



NEM Technology Platform Workshop
3 December 2004 Nice

STMicroelectronics

a **global semiconductor company**

Sales by region % of 9 months 2004 sales

14 %
North
America

27 %
Europe

5 %
Japan

42 %
Asia Pacific

12 %
Emerging
Markets*

○ 9 months 2004 Sales : **US\$ 6.43 billion**

○ 2003 Sales : **US\$ 7.24 billion**

○ over **45,000** employees

○ **17** main production sites

○ **16** advanced R&D centers

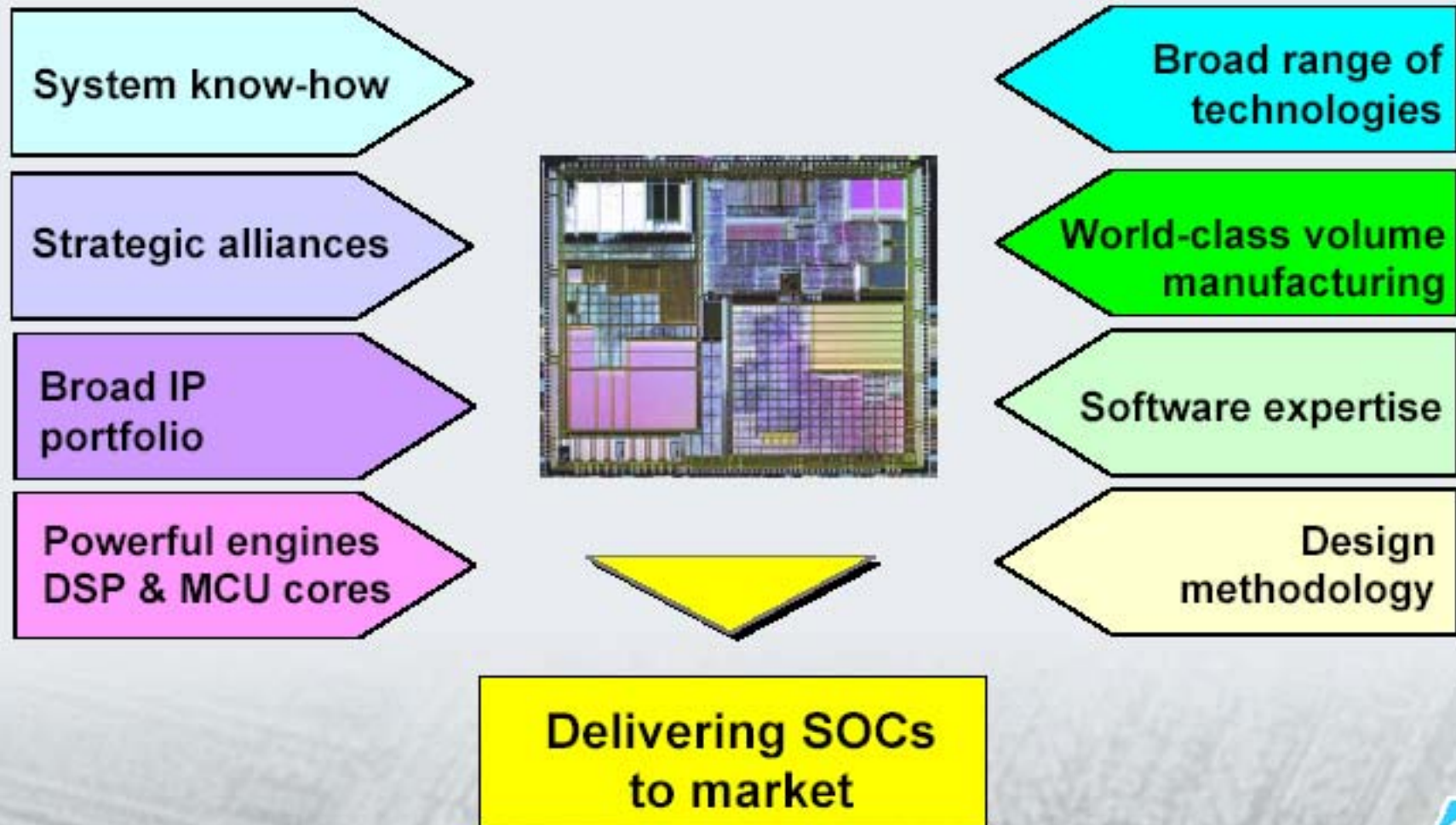
○ **39** design and application centers

○ **88** direct sales offices in **31** countries

* Eastern Europe, India, Africa, Latin America, Middle East



A **pioneer** and **leader** in system-on-chip solutions



Application specific product

leadership

(Based on 2003 Revenues)

#1 in application specific ANALOG solutions with over \$3 billion in revenues or 15% market share



Key targeted market segments

#1 in wireless with \$1.1 billion in revenues, or 18% market share

#1 in computer peripherals with \$1 billion in revenues, or 27% market share

#1 in automotive with \$780 million in revenues, or 22% market share

And #1 in Digital Consumer ASSPs with \$684 million in revenues, or 11% market share



ST 's contribution to NEM

- ST supports the enabling technologies for NEM by the development of SOC components for the Reference Architecture and Platforms in the field of personal and home communication networks and appliances
- ST is number one in the world of differentiated products by exploiting the strategic partnerships with equipment and terminal manufacturers
 - Nokia, Alcatel, Thomson.....



ST's contribution to NEM

- Developing enabling technologies
 - deep submicron high level integration and high performance analogue for communications and interfaces.
 - micro-systems integration
 - IP's for multi-standard and multi-mode multi-media systems
 - Flexible and reconfigurable SoC's for any-time any-place communication

ST's contribution to NEM

- Extensive experience and product portfolio in NEM application fields
 - consumer electronics, audio and video
 - communications; wired and wireless, PAN and WAN.
 - automotive
 - computer peripherals
 - processors and memories
 - embedded systems

ST's contribution to NEM

- Added Value for NEM
 - Advanced technology offer will allow to meet or supersede the NEM requirements and offer competitive advantage.
 - Fast access to enabling technologies for "lighthouse" projects.
 - Existing wide strategic customer base related to NEM.
 - Completes the value chain with embedded and integrated systems on silicon.