

Netherlands Mission to Semicon India 2026

16 - 19 Sept 2026



Netherlands



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Foreword



The Netherlands is proud to join Semicon India 2026 with a high-level delegation that reflects our country's full strength across the semiconductor value chain. This mission comes at a pivotal moment: India's semiconductor market, already valued at USD 64 billion in 2026 and projected to reach USD 150 billion by 2030, is rapidly emerging as a global hub for chip design, manufacturing, and innovation. With twelve semiconductor manufacturing units approved by the Government of India and several already in commercial production, India's ambitions in this strategic sector are both clear and credible.

The Netherlands brings to this partnership a unique and complementary profile. We are home to ASML, the world's only producer of extreme ultraviolet (EUV) lithography systems that underpin the most advanced chip manufacturing. Our ecosystem includes global leaders such as NXP Semiconductors, top research universities, and the High Tech NL network, which together drive innovation in equipment, materials, chip design, and R&D. This makes the Netherlands not only a key player in the global semiconductor landscape, but also a natural strategic partner for India's next phase of growth.

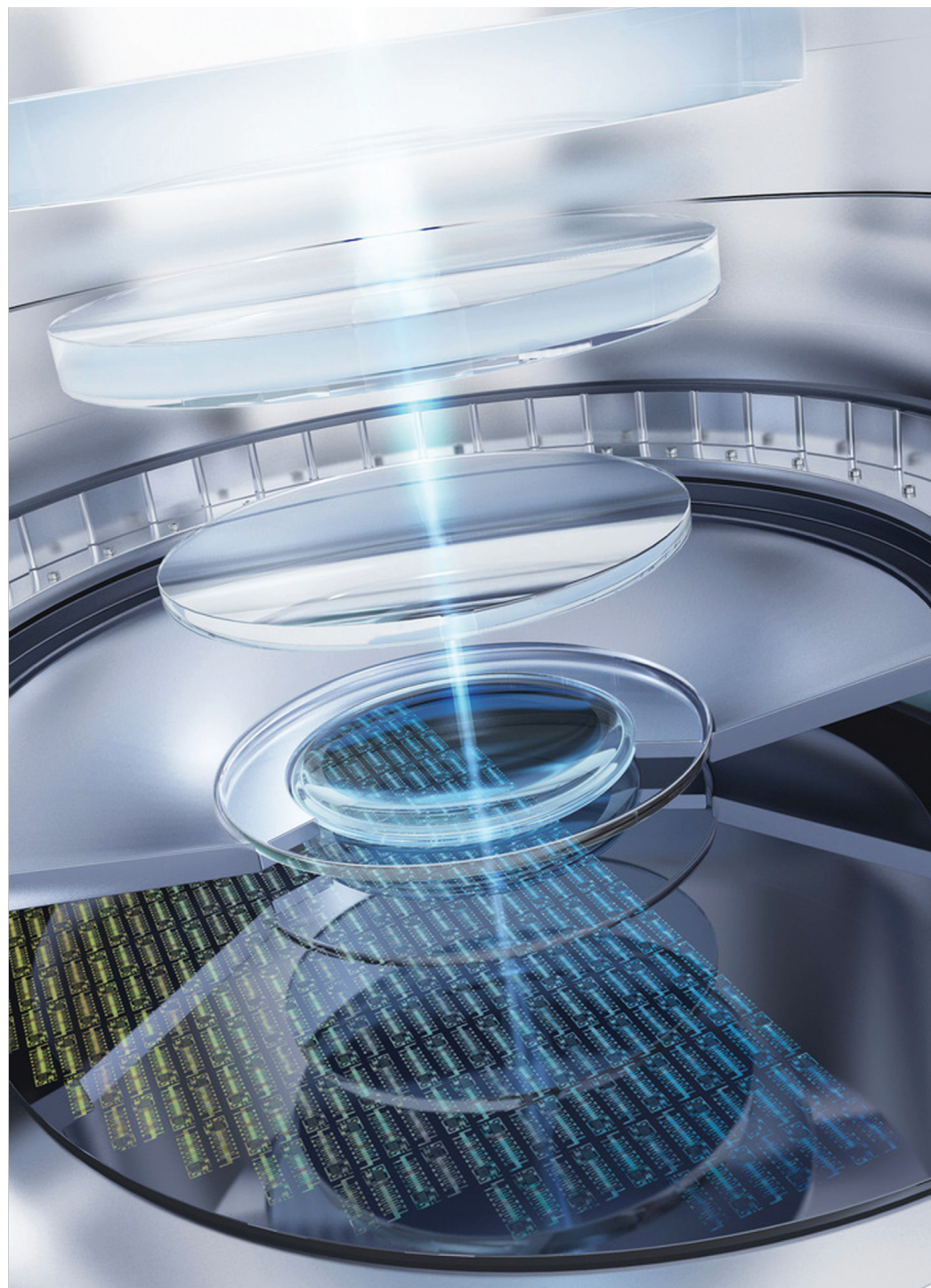
In May 2026, our two countries elevated their relationship to a Strategic Partnership and adopted the India–Netherlands Roadmap 2026–2030, with semiconductors as one of its central pillars. Under this framework, a landmark Memorandum of Understanding on Semiconductor Partnership was signed, linking the Dutch Semicon Competence Centre with the Indian Semiconductor Mission (ISM). This will help nurture startups and SMEs, strengthen talent development, and foster innovation-led collaboration across our ecosystems.

Semicon India 2026, with more than 350 exhibitors from 48 countries and tens of thousands of participants, showcases India's rising global role in chips. Against this backdrop, the Netherlands Pavilion will present our delegation of 15+ companies and over 50 industry leaders spanning equipment, materials, chip design, system integration, R&D, and talent. We are here not as individual actors, but as a cohesive, innovation-driven ecosystem looking to build enduring partnerships with Indian counterparts.

The future of semiconductors will be written through collaboration. The India–Netherlands Strategic Partnership gives us the framework; Semicon India 2026 gives us the momentum. Let us seize this opportunity together not just to observe the chip revolution, but to build it, side by side.

Wishing you a successful event!

H.E. Marisa Gerards
Ambassador of the Kingdom of the Netherlands



Foreword



2026 marks an important milestone for High Tech NL and our semiconductor members. For the first time, we are participating in SEMICON India in New Delhi with our own Netherlands Pavilion.

Together with 15 Dutch companies, ranging from innovative SMEs to global players such as NXP, I am proud to present the strength and diversity of the Dutch semiconductor ecosystem in India. The participating companies represent expertise from across the value chain and demonstrate how specialised technologies and close collaboration contribute to internationally competitive solutions.

Collaboration is essential to advancing semiconductor innovation. The complexity and pace of technological development require companies, knowledge institutions and governments to combine their expertise and build strong international partnerships. By connecting these parties, High Tech NL aims to accelerate innovation, create opportunities for its members and contribute to a competitive and future-proof semiconductor industry.

India is becoming an increasingly important partner for our members and for the Netherlands. The Dutch ecosystem offers advanced knowledge, technologies and specialised suppliers, while India brings a rapidly developing market, technological expertise and the ambition to strengthen its position in the global semiconductor value chain. Connecting these complementary strengths can create lasting opportunities for innovation, technology partnerships and business development.

Our participation is organised in close cooperation with the Embassy of the Kingdom of the Netherlands in New Delhi and the Netherlands Enterprise Agency (RVO). For me, this first participation is about more than being present at an exhibition. It is about exploring India together, understanding its semiconductor strategy, meeting the right partners and identifying areas in which our ecosystems can strengthen one another. This first Netherlands Pavilion is not a destination, but a starting point. I very much look forward to building long-term relationships between Dutch and Indian companies, knowledge institutions and public partners – and to turning shared ambitions into concrete cooperation.

Micha Tahar
Business Development & Project Manager High Tech NL Semiconductors



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The Netherlands

The Netherlands



Locations

- 1. Amsterdam (and Airport Schiphol) |
- 2. Arnhem | 3. Assen | 4. Breda |
- 5. 's Hertogenbosch | 6. Eindhoven |
- 7. Enschede | 8. Groningen | 9. Haarlem |
- 10. The Hague | 11. Leeuwarden |
- 12. Lelystad | 13. Maastricht |
- 14. Middelburg | 15. Rotterdam |
- 16. Utrecht | 17. Zwolle |

Introducing the Netherlands

The semicon industry is a truly global industry, with products crossing borders up to 70 times. The Netherlands is one of only three countries to have all 6 steps of the value chain - from design and fabrication to packaging, testing and assembly of the end product - all within a 200-km radius. The close proximity of members of the ecosystem keeps the lines of communication short and accelerates innovation.

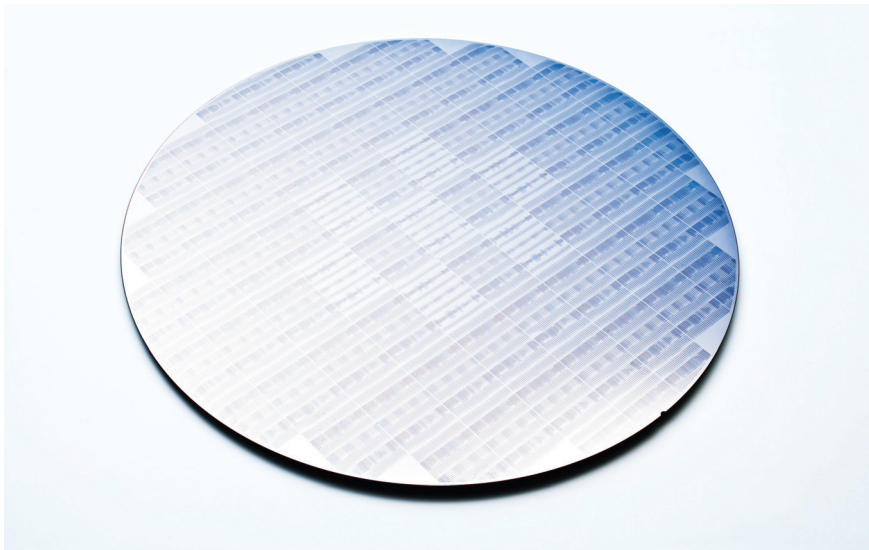
Similarly, in the Netherlands, governments, businesses, research and local stakeholders work together in what is known as the quadruple helix. This model reinforces the effectiveness of the ecosystem, by nurturing interaction at all levels. The lack of a hierarchical system makes it easier for quick decision-making and bottom-up ventures. Centuries of joining forces against the elements has taught the Netherlands how inclusive action provides better results and out-of-the-box solutions.

As early adapters with a high level of digital literacy, consumers and companies alike are keen to buy new technology creating a ready market at home. At the same time,

the Netherlands is a seasoned partner in networks and international cooperation on global markets. Our proven track record in major innovations makes the Netherlands an attractive semicon partner.

The Netherlands is a leading global player with regard to knowledge on and production of semiconductors. We are the largest supplier to the automotive industry and home to the world's biggest machine builder for semicon manufacturing, ASML. Nevertheless, the semicon industry in the Netherlands is largely fed by small to medium-sized companies employing up to 50 people. As a result, the Netherlands boasts both the stability of large companies with comprehensive vertical integration and the versatility of independent operators.

Inside the Netherlands, around 200 semicon companies employ 40,000 people and have an annual turnover of 23 billion euros*. Considering the Netherlands is internationally renowned with many companies active outside the country, the total turnover is much higher.



Worldwide rankings

1st

Largest flower exporter
(Source: OEC, 2024)

1st

Quality of Life Index by Country
(Source: Numbeo, 2026)

2nd

Euro Health Consumer Index Score
(Source: World Population Review, 2026)

4th

Technology Readiness
(Source: Economist Intelligence Unit, 2018–2022)

4th

Largest importer of goods in the world, 842.05 billion US dollars
(Source: Statista, 2023)

4th

Largest exporter of goods in the world, 934.57 billion US dollars
(Source: Statista, 2023)

4th

Leading economy worldwide by Foreign Direct Investment (FDI) inward stock, 2,86 trillion US dollars
(source: Statista, 2023)

7th

Greatest place to live
(Source: World Happiness Report, 2026)

8th

on the Global Innovation Index
(Source: WIPO, 2025)

Facts & figures

Official name:

Kingdom of the Netherlands

Capital:

Amsterdam

Seat of government:

The Hague

Form of government:

Parliamentary democracy (cabinet of Prime Minister and Ministers) within a constitutional monarchy

Head of State:

His Majesty King Willem-Alexander, King of the Netherlands, Prince of Orange-Nassau

Location:

Western Europe, bordering Germany, Belgium and the North Sea

Administrative structure:

The kingdom consists of four countries: the Netherlands on the European continent and three countries in the Caribbean: Aruba, Curaçao, and St. Maarten.

Special municipalities:

The overseas islands of Bonaire, Saba and St. Eustatius, all three of which are situated in the Caribbean

Surface area:

41,543 km²

Number of provinces:

12

Number of inhabitants (2026):

18,4 million

Number of inhabitants per km2 (2025):

536

Monetary Unit:

Euro

Unemployment rate (CBS, 2025):

4%

Languages:

Dutch, Frisian and on the overseas islands also English and Papiamentu

GDP per capita (World Bank, 2024):

68,219 US dollars

English speaking Dutch people:

90%

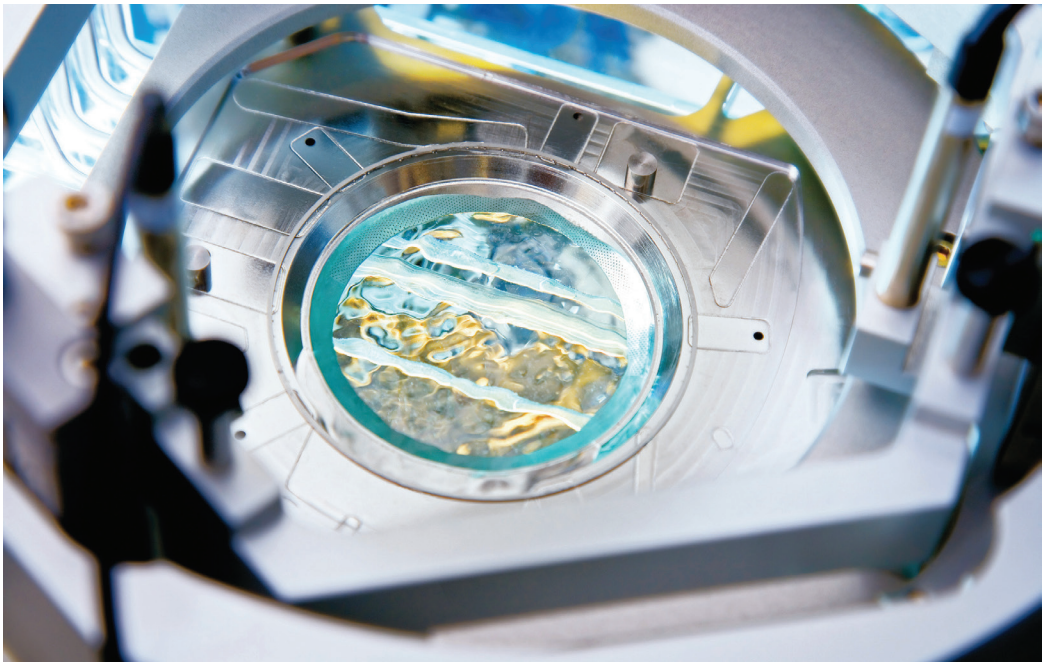
India and the Netherlands:

India–Netherlands Semiconductor Partnership

In the last 50 years, semiconductors have revolutionised our lives. This key enabling technology is an essential component driving innovations in computers, smart devices, cloud computing, and 5G communication networks. And with the Internet of Things, 70% of semicon chips are now inside everyday consumer appliances from washing machines and fridges to self-driving electric vehicles, wearables and drones.

India Semiconductor Mission (Semicon) 2.0 on 15 July 2026, representing India's next phase in building a globally competitive semiconductor ecosystem. This represents a shift from supporting individual fabrication projects to building a complete semiconductor ecosystem—integrating design, manufacturing, advanced packaging, equipment, materials, research, talent, supply chains

and strategic international partnerships across Asia, Europe and North America. The mission directly supports the NTS priority on semiconductor technologies by linking Dutch strengths in equipment, precision engineering, design enablement and system integration to India's scale in design talent, manufacturing expansion and industrial adoption. Under the India–Netherlands Strategic Part-



nership (2026–2030), semiconductors are a flagship area of cooperation. Both governments agreed to:

- Implement a bilateral partnership on semiconductors and emerging technologies
- Promote semiconductor investment
- Support collaborative R&D
- Increase talent mobility
- Build academic partnerships
- Strengthen industrial cooperation
- Develop resilient semiconductor supply chains
- Cooperate on critical minerals
- Via the Indo-Dutch Semicon Online School, India–Netherlands Academic “Brain Bridge” program among others

Facing global challenges together

Companies worldwide face supply chain issues. Semicon is no exception. Extremely specialised tech companies are hampered by a global shortage in chip production. The US and China are currently leading semicon markets. Europe needs to upscale its production to meet the shortfall in supply. The chip shortage has been exasperated by logistic problems caused by COVID-19. Meanwhile, a lack of skilled technicians and outsourcing are making it difficult for the industry to flourish in Europe. At the same time, the semicon industry faces threats to data security and possible energy shortages with subsequent rising costs.

The semicon industry also has to contend with national and international environmental legislation as governments tackle climate change. The industry itself requires large quantities of water and energy. This has a huge impact on the environment. In reverse, climate change negatively impacts semicon supply chains and production. All this reinforces the case for long-term investment in increasing the capacity for sustainable and innovative chip production. The Netherlands and India are committed to realising such long-term investment.

Although the production of semicon technology uses lots of natural resources, applying it can help tackle the Sustainable Development Goals and Climate Change. In achieving food security, big-data software for climate models and sensors help crop monitoring. In the transition towards a zero-emission economy, electronics are used for solar energy, electric vehicles and energy storage systems. And in health, miniaturised healthcare diagnostics, personalised medication and life-style applications are saving and enhancing lives.





Company Profiles



Axelera AI

Axelera AI, a Netherlands-based deep-tech company pioneering next-generation AI Processing Units (AIPUs) that deliver high-performance, energy-efficient AI inference.



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We are enabling real-time AI inference in Smart City and Safe City deployments, powering computer vision for Defence and Surveillance, driving automation in Manufacturing and Industry 4.0, supporting AI-driven decision-making in BFSI, Pharma, Healthcare and empowering Retail and IT/ITeS enterprises with scalable, cost-efficient AI at the edge.

As India accelerates its AI ambitions through the India AI Mission and semiconductor self-reliance push, Axelera AI's hardware-first approach offers a compelling alternative — bringing datacenter-grade AI performance to the edge, at a fraction of the power and cost.



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We help in delivering measurable ROI for AI deployment.



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Axelera AI

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Boschman Technologies

Boschman Technologies is a market leader in Pressure Sintering and Advanced Transfer Molding, offering both development services and industrial equipment. We provide a one-stop-shop for innovative packaging solutions, from concept to industrialization, ensuring efficient and effective packaging with a short time-to-market.



James Tan
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Boschman specializes in advanced transfer molding and sintering systems for electronic assembly industries, offering technologies like Ag-Sintering, Film Assisted Molding (FAM), Dynamic Insert Technology (DIT), and Through Polymer Via (TPV). Their applications span various industries, including automotive, medical, avionics, mobile, industrial, and renewables.

Their package development process includes conceptualization, design, prototyping, and sampling, ensuring high yield production and compliance with ISO-9001-2015 standards. Boschman also offers low to medium volume assembly services, leveraging over 30 years of experience in advanced packaging solutions.

Boschman Technologies

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Bronkhorst High-Tech B.V.

Bronkhorst High-Tech B.V. is a Netherlands-based global leader in precision low-flow measurement and control solutions for gases and liquids, with 45 years of expertise in flow and pressure technology. And offers a comprehensive portfolio including Mass Flow Meters (MFM), Mass Flow Controllers (MFC), Pressure Controllers, Coriolis Flow Meters & Controllers, Vapor Delivery Systems, and Liquid Dosing Systems. These solutions serve diverse industries including biotechnology, pharmaceuticals, chemicals, food & beverage, renewable energy, research, and semiconductor manufacturing. Bronkhorst's wholly owned subsidiary, Bronkhorst Instrumentation India Pvt. Ltd., based in Pune, Maharashtra, provides local sales, service, calibration, and application engineering support across India.

In the semiconductor market, Bronkhorst offers highly accurate gas and liquid flow control solutions for critical processes such as wafer fabrication, Atomic Layer Deposition (ALD), Chemical Vapor Deposition (CVD), plasma etching, wafer cleaning, specialty gas delivery, and FOUF handling systems. Its advanced mass flow controllers ensure precise dosing of process gases, helping semiconductor manufacturers achieve higher yield, process consistency, and contamination control. As India's semiconductor ecosystem continues to expand through new fabrication facilities and supply-chain investments, Bronkhorst is well positioned to support OEMs, equipment manufacturers, research institutions, and semiconductor fabs with reliable and accurate flow-control technologies.

Bronkhorst High-Tech B.V.

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Fastmicro

Fastmicro is a technology leader in advanced surface particle contamination inspection equipment, serving the microtechnology industries. Our fast particle detection and measurement solutions offer high throughput and cost-efficient cleanliness control at sub-micron level, reducing defectivity, failures and yield losses.



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Our product range and analytics software cover a wide variety of applications and processes, including in-line defect inspection systems, transportable scanners, continuous particle fallout monitoring, and scanning modules for system integration.

As an innovative metrology equipment and service supplier based in the Eindhoven Brainport area (Netherlands), Fastmicro has a global presence with sales offices and local representation in Europe, Asia, and the USA.

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GX International BV

GX International BV is the advanced fiber and photonics division of GX Group, dedicated to developing and manufacturing high-performance optical components and photonic technologies that power next-generation communication networks. Leveraging cutting-edge research, precision engineering, and advanced manufacturing, the company delivers solutions for fiber-to-the-home (FTTH), telecom, enterprise, hyperscale data centers, and AI-driven network infrastructure. Its portfolio includes optical transceivers, passive optical components, wavelength division multiplexing (WDM) solutions, and photonic integrated technologies designed for exceptional reliability, scalability, and energy efficiency. With a strong focus on innovation, quality, and sustainability, GX supports global service providers, OEMs, and technology partners in building faster, smarter, and more resilient optical networks. By continuously advancing photonic technologies, GX International BV is helping shape the future of high-speed connectivity and the digital economy.

GX International BV

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Innatera Nanosystems BV



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Innatera enables the world's sensor data to be processed as soon as it is captured, directly at the source. Incorporated in 2018 as a spin-off from the Delft University of Technology, it develops a line of neuromorphic processors that mimic the mechanisms the brain uses for processing sensory data. Using a radically new computing architecture that is massively more efficient than conventional technologies, its chips enable breakthrough physical AI capabilities even in devices powered by small batteries. Innatera's technology makes intelligence pervasive for a smarter, safer, and cleaner world.

Innatera is backed by leading European deep-tech investors and aims to bring intelligence to a billion devices by 2030.



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Innovally

Innovally is a public-private innovation platform in Almere that connects companies, governments, knowledge institutions and talent to turn digital and high-tech ideas into real-world solutions. At its core is a dynamic ecosystem built on three pillars: Meet, Connect and Accelerate. People, ideas and challenges come together in events, programs, workspaces and testbeds, where innovations are developed, tested and scaled. Innovally focuses on areas such as AI, robotics, smart manufacturing and sustainable technologies, always with an eye on societal impact. By bringing the right partners together and offering access to knowledge, networks and capital, Innovally helps promising concepts grow into impactful innovations and strengthens Almere and Flevoland as a leading tech hotspot.

Innovally

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<https://innovally.nl/>

MECAL High-tech / Systems

MECAL High-tech / Systems is an independent global engineer with an OEM product base that specializes in being in control of critical conditions for research, development and production in high-tech materials and high-tech systems. Our technology is developed in and for the semiconductor industry.

We focus on applied research and engineering and have been developing a vast IP base, and a very strong OEM product base.

We are involved in multiple co-developer relations with high-end developers and demanding top tier customers. We optimize and enable technologies through our applied engineering over the full span of the technology: design/ specification phase, prototypes and 1st series production, as well as custom made products, operations and support in the operational phase of technologies.



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Nexperia

Headquartered in the Netherlands, Nexperia is a global semiconductor company with a rich European history and over 12,500 employees across Europe, Asia, and the United States.



Sreekanta Esturi

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As a leading expert in the development and production of essential semiconductors, Nexperia's components enable the basic functionality of virtually every electronic design in the world – from automotive and industrial to mobile and consumer applications.

Nexperia

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<https://nexperia.com/>



NXP Semiconductors

NXP Semiconductors is the trusted partner for innovative solutions in the automotive, industrial & IoT, mobile, and communications infrastructure markets. NXP's "Brighter Together" approach combines leading-edge technology with pioneering people to develop system solutions that make the connected world better, safer, and more secure. The company has operations in more than 30 countries and posted revenue of \$12.27 billion in 2025. Find out more at www.nxp.com



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Raynetics

At Raynetics, we are building platform for those who build the future. Our mission is rooted in deep understanding that nanoscale characterization is just a beginning step in materials science. True innovation in nanotechnology requires tools that do more than just observe. These must accelerate discovery, guide design workflows and scale impact. Hence, we aim to change how scientists and engineers interact with matter at the atomic and molecular level. Our advanced 3D imaging and analytics platform enables comprehensive spatial and compositional analysis of materials, providing the quantitative foundation necessary for predictive modeling, AI-driven experimentation, and automated hypothesis testing. Rather than being about better data, it is the creation of a language for matter that machines can understand, reason with and use to accelerate discovery.



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Source Engineering Services

Engineering Expertise. Global Reach. Lasting Impact. Source Engineering was built on a simple idea: bring world-class engineering talent to companies that need to move fast, stay flexible, and deliver with precision.

Today, with offices in the US, India, and the Netherlands and a global partner network, we help businesses across industries—from semiconductors to advanced manufacturing—achieve faster time-to-market, streamlined operations, and measurable ROI through high-impact engineering services.



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Tempress

Tempress' purpose is to support customers in the semiconductors, power, MEMS, photonics, life sciences and coating markets to produce advanced materials and devices with high added value innovative furnace solutions. Tempress' over 50 years of heritage in developing and producing diffusion and deposition equipment and related processes is a testament to the company's flexibility, innovation, quality, and dedication. Our technologies and products have advanced the semiconductor industry. Tempress' headquarters and assembly and testing facilities are located in Vaassen, The Netherlands. Customers are supported throughout the world by its highly professional direct sales and service people and commercial partner network.

Tempress

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Netherlands Organisation for Applied Scientific Research (TNO)

The Netherlands Organisation for Applied Scientific Research, abbreviated TNO, is an independent statutory research organisation in the Netherlands that focuses on applied science. It conducts contract research, offers specialist consulting services, and grants licenses for patents and specialist software. TNO founds new companies to market innovations.



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Netherlands Organisation for Applied Scientific Research (TNO)

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WorldEmp

For ambitious Dutch companies in semiconductors and advanced technology, access to skilled engineering talent is critical — and increasingly scarce. WorldEmp has operated in India for 10 years, with offices in Pune and Bangalore, and understands its market and talent landscape inside out. We offer a fast, structured and trusted route to connect you with highly educated remote specialists in engineering, software, AI and data, working full-time and exclusively as part of your own team. From dedicated capacity to your own office through our Build-Operate-Transfer model: a risk-free first step into India, without entity or major investment.



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