



The CSconnected SIPF
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UK Research
and Innovation

CSconnected Report 2026

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Executive summary



As we reach the conclusion of the Strength in Places Fund (SIPF) programme, we do so standing on the foundations of a transformative five year period for the South Wales region's compound semiconductor cluster.

SIPF, funded by UKRI, has enabled far more than the sum of its investments: **it has catalysed deep collaboration, strengthened strategic capability and demonstrated the power of working as a coordinated community with shared purpose and ambition.**

Through this programme, we have seen genuine step change. The cluster has matured into an internationally recognised ecosystem, with partners across industry, academia and government operating in alignment, leveraging long-term infrastructure and shared expertise. SIPF has enabled us not only to accelerate innovation and productivity but also to spin out CSconnected as a dedicated, world-first entity – one positioned to drive strategic growth, attract further investment and champion the region and UK on a global stage.

The achievements of this period are far reaching. Across research, commercialisation, infrastructure development and skills, the metrics speak for themselves. CSconnected SIPF has fostered trust, cohesion and a collective understanding of what we can achieve through collaboration. That mindset is now embedded across the cluster; it frames what comes next.

This is not an ending, far from it. The conclusion of the project marks the start of our next phase of growth: a springboard into an even more ambitious future. Our vision for the coming years builds directly on progress made to date, but scales it with clear, measurable intent.

We aim to grow cluster revenue to £1 billion, ensuring that value created within our ecosystem is captured across the wider regional supply chain. This next phase is fundamentally about ensuring that prosperity reaches the whole community – not only through commercial success but through the development of skilled, meaningful, long term employment.

Over the next five years, we aim to grow the cluster community to 6,000 people, with a major focus on developing local talent that will sustain the region's competitiveness for decades to come.

However, we cannot afford to be complacent. Although the South Wales cluster continues to defy national trends and demonstrate robust growth, sustaining this momentum will depend on securing future funding and investment that is agile, dynamic and responsive to rapidly evolving global markets. For the UK to fulfil its ambition of becoming an innovation powerhouse, one that is competitive on the world stage alongside the US and China, we must ensure that support mechanisms are flexible enough to keep pace with both opportunity and disruption.

As we look ahead, we continue to work closely with UK Government, Welsh Government, Cardiff Capital Region and other stakeholders. The Industrial Strategy (IS-8) and forthcoming funding mechanisms offer significant potential to drive the next wave of innovation and growth.

Howard Rupprecht
Managing Director
CSconnected

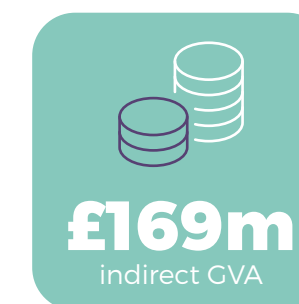
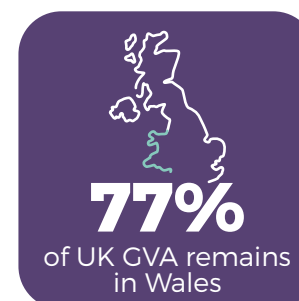
“CSconnected SIPF has fostered trust, cohesion and a collective understanding of what we can achieve through collaboration.”

2025 highlights

About CSconnected

CSconnected is the **world's first compound semiconductor cluster**. Located in South Wales and supported by the Strength in Places Fund (UK Research and Innovation) and Cardiff Capital Region. The cluster unites leading companies, research institutions and government partners to drive innovation, economic growth, and global leadership in semiconductor technology.

Since launch, the cluster has demonstrated robust growth and resilience, attracting major private investment, strengthening supply chains and developing a talent pipeline delivering impact across the South Wales economy.



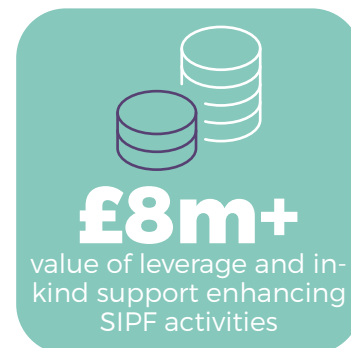
The Strength in Places Fund (SIPF)

The Strength in Places Fund (SIPF), backed by UK Research and Innovation (UKRI), supports place based industrial clusters to scale, collaborate and compete globally. In South Wales the £43m programme, led by Cardiff University, has accelerated growth in compound semiconductor research, skills and advanced manufacturing.

Since 2021, SIPF has strengthened CSconnected's position as the world's first compound semiconductor cluster through collaborative R&D, infrastructure expansion and enhanced skills provision.

CSconnected SIPF review

KPI summary



SIPF overview

At the core of the SIPF project are four major collaborative R&D programmes:

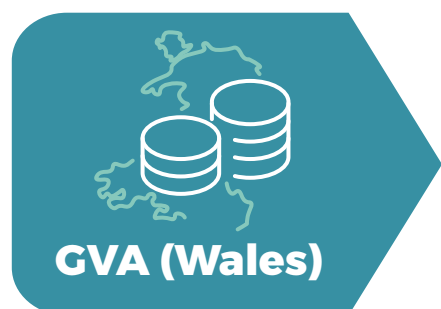
- 1** Next generation optical communications and sensing
- 2** Large scale GaAs based wafer manufacturing
- 3** Novel and efficient CS wafer fabrication tools
- 4** Advanced processes for 5G and EAV systems

CSconnected SIPF impact at a glance



Direct jobs **1,407** >>> **1,914** +36%

Total Welsh jobs **2,085** >>> **3,140** +51%



Direct GVA **£172m** >>> **£267m** +55%

Total Welsh GVA **£227m** >>> **£436m** +92%



Annual sales **£440m** >>> **£531m** +21%

Exports **~£438m** >>> **£480m** 90%+ export intensity

Global perspective: The compound semiconductor sector

The global compound semiconductor sector is accelerating rapidly, driven by growing demand for advanced communications, clean energy, autonomous systems and next generation electronics. As these technologies become increasingly strategic, international supply chains are facing heightened political, economic and operational pressures.

Geopolitical tensions, export controls and growing competition for sovereign capability are reshaping where and how semiconductor manufacturing takes place, with significant investment underway across the US, Europe and Asia. At the same time, global supply chains remain vulnerable to disruption, particularly around critical inputs such as specialist materials, energy and logistics.

Rising and volatile energy costs are placing further pressure on fabrication environments that require consistent, high intensity power, challenges that are compounded by the rapid expansion of AI driven semiconductor demand. Together, these factors reinforce the importance of resilient, diversified and strategically coordinated compound semiconductor supply chains rooted in trusted regional ecosystems.

Business development and FDI

Overview of 2025 activity

Business development and supply chain engagement in 2025 focused on strengthening ecosystem connectivity across South Wales and the wider UK. A key milestone was the launch of the Supply Chain Funding Call (March 2025) which rapidly became a driver of supplier engagement and capability building.

The programme now supports six active projects. In addition, the business development team headed up by Hazel Hung has grown with new staff member Erin Davies, who joined as cluster development coordinator.

Supply Chain Development Programme funding

The £1 million Supply Chain Development Programme was delivered in partnership with Cardiff Capital Region (CCR) and announced its fourth funding round in March 2026.

Empowering Next-Generation
Semiconductor Talent

and Future Impact

Cardiff
South Wales, Wales, UK
2026

CS connected



This dedicated fund aims to accelerate the expansion of the compound semiconductor supply chain, driving job creation, stimulating economic growth, and strengthening the UK's strategic position in advanced semiconductor manufacturing.

The programme was launched at a dedicated event in March 2025 and the first of two Supply Chain networking events was held in July.

New entities joining the cluster recently

In 2025, a number of companies located into the cluster region, further strengthening the community and contributing to inward investment momentum. There were a mix of Wales based expansions and UK relocations and included organisations taking first steps into the compound semiconductor sector alongside long term established companies. Some of the companies include:



SIEMENS



Business development and FDI

Network expansion and membership model

The Membership Model formally launched in Nov 2025 at a prestigious celebration 10 year anniversary of CSconnected event. The member framework provides a structured pathway for industry engagement and future growth. Four member types cover all aspects of the ecosystem from raw material suppliers, wafer fabrication and chip design to precompetitive R&D, assembly, test and packaging and component distribution. It supports the cluster's wider goal of strengthening industry connections, creating a more cohesive and accessible network for companies seeking to work within the region.

Members benefit from accreditation, access to job listings and wider supply chain connections, logistics support and advisory board.

FDI international engagement and visits

2025 saw extensive international interest in the region. Foreign direct investment (FDI) visits increased significantly, with delegations arriving from Canada, Indonesia, Bulgaria, and Malta, among others.

These visits demonstrate the effect of SIPF investment in boosting the global visibility of the cluster. The region is increasingly acting as a 'magnet' for organisations seeking to learn how a successful cluster is built; explore technology partnerships; or to assess potential commercial collaboration.

Partnership development and sector impact

2025 saw a significant uplift in partnership building with the SIPF directly improving regional visibility and credibility. The business development team expanded cross cluster and cross sector partnerships, contributing to growing recognition of cluster expertise. Activities included:

- ▶ Regular attendance at industry events
- ▶ Facilitating connections between companies and cluster partners
- ▶ Reporting on new connections, affiliations and collaborations.

Core members



Network members



Skills and outreach

Skills: Overview and impact

The SIPF has played a pivotal role in expanding CSconnected's outreach, skills development and talent pipeline programmes across Wales. Over the funding period, SIPF has enabled meaningful engagement with learners, teachers and professionals, improving awareness of the semiconductor sector and laying the foundations for long term workforce growth.

Reach and engagement: Building awareness

12,000-13,000 individuals reached in 2025 alone

SIPF-backed activity delivered a significant visibility in engagement across schools, colleges, universities and skills and careers focused events. The areas covering postcodes SA1-SA15 (Swansea and surrounds) were the focus area for the SIPF funded activity in 2025.

- ▶ **96%** of engagement was delivered through **school based projects and South Wales outreach providers**.
- ▶ Activity reached learners from **years 5-13**, with structured "touch points" at critical decision making stages:
 - ▶ **Years 5-6:** early awareness before transition to secondary school
 - ▶ **Years 7-8:** second touch point as subject choices emerge
 - ▶ **Year 9:** GCSE selection support
 - ▶ **Years 10-11:** college and future pathway guidance
- ▶ Engagement also included **college and university students, teachers, parents and adult professionals** through careers fairs and community events.



Connections Made in Wales

Introducing '**Connections Made in Wales**', our interactive display, developed with Whitefire Associates Ltd to support STEM outreach across South Wales. Designed to engage and inspire, the display helps students explore the building blocks of compound semiconductors. Using tokens, learners combine elements from the periodic table to form compound materials, then see how these are applied as real-world electronic components, powering technologies such as electric vehicles, solar panels, sensing and communications. The interactive format is designed for older students and naturally draws in younger audiences too, making it a powerful tool for sparking curiosity and conversations about future technology careers.

Case study: Sparking STEM Futures

The **CSconnected: Sparking STEM Futures initiative** is inspiring the next generation of semiconductor talent across South Wales by delivering hands on, curriculum linked STEM learning to thousands of pupils. Through a coordinated network of partners – including EESW, Lungo Solutions, Technquest, UKESF and Oriel Science – the programme introduces young people to the science and real world applications of compound semiconductors at both primary and secondary level.

Primary pupils engage with foundational concepts through practical activities such as **Circuit Explorers**, while older students explore sustainability, coding and engineering through **Smart Homes** projects, accredited workshops, competitions and enrichment events. These experiences build confidence, digital capability and awareness of local career pathways.

By combining interactive learning with industry engagement – such as lab tours, activity kits and meet the engineer events – the initiative strengthens the region's talent pipeline and connects learners directly with South Wales' growing semiconductor ecosystem.



Programme highlights

A flagship two phase programme jointly funded by SIPF and CCR, **Sparking STEM Futures** has delivered widespread, high impact enrichment across South and West Wales.

Phase One launched January 2024

Phase Two completed March 2026

Key elements funded and delivered through SIPF:

- ▶ **Hands on school workshops**, showcases and immersive STEM experiences
- ▶ **In house activity at Technquest**, including a new **interactive semiconductor exhibit** installed April 2026
- ▶ Funding for a partner organisation to deliver the WJEC Level 2 **GCSE in Semiconductors**
- ▶ **Teacher CPD programmes** enabling educators to confidently deliver the new WJEC qualification
- ▶ Support for the development of **Level 2 and Level 4 semiconductor qualifications**

Infrastructure and outreach assets

SIPF investment enabled the development of new engagement tools, including:

- ▶ A **Technquest interactive exhibit**, designed and built by specialist studio Whitefire
- ▶ A **CSconnected tabletop outreach stall**, deployed across science centres and public STEM events

These assets will continue delivering value beyond the life of the SIPF programme.

Programme highlights

- ▶ **23,000+ people reached** across South Wales
- ▶ Expanded pipeline activity into **underserved West Wales regions**
- ▶ Enhanced visibility and understanding of **semiconductor careers among primary, secondary and post 16 learners**
- ▶ **Strengthened teacher capability** through targeted CPD
- ▶ Early evidence of **growing public recognition** of the semiconductor industry
- ▶ Clear progress toward long term sector goals, including supporting the ambition to **double the semiconductor workforce and enable 6,000 jobs by 2030**

CPD activity

Overview

SIPF funding has enabled Cardiff University to lead on the development and delivery of a suite of CPD short courses supporting both upskilling and reskilling across the compound semiconductor cluster.

Activity developed since the start of the programme now encompasses **nine CPD courses** – some in-person and some online – ranging from introductory-level courses in topics such as the semiconductor supply chain and cleanroom etiquette to more advanced modules in electronics, photonics, etching, and wire bonding.

These programmes have been shaped directly through industry consultation, ensuring they address real skills needs and support the long term talent pipeline of the sector.

Programme development and industry alignment

The CPD programme has been built through:

- **Extensive scoping with cluster companies**, identifying shared skills priorities and training needs across organisations.
- **Iterative development with industry representatives**, ensuring courses reflect authentic workplace skills and challenges.
- **Piloting and feedback cycles** before launch, enabling refinement and improvement based on participant and employer input.

Course: Introduction to Compound Semiconductor Electronics



I am deeply committed to both personal and professional development and constantly seek opportunities to expand my knowledge and skills. When I saw the Introduction to Compound Semiconductor Electronics course, I was immediately drawn to it. The semiconductor industry is rapidly growing in South Wales, so this was an opportunity I didn't want to miss.

Jonathan Wonnacott
Retail Maintenance Technician

Delivery highlights (2025)

Nine courses created and delivered:

- **Specialist technical modules** (e.g., compound semiconductor electronics, photonics, etching).
- **Awareness raising introductory pathway** for professionals with transferable skills who might consider entering the sector.
- Online and in person blended options, **widening access for working professionals**.

Participation and engagement



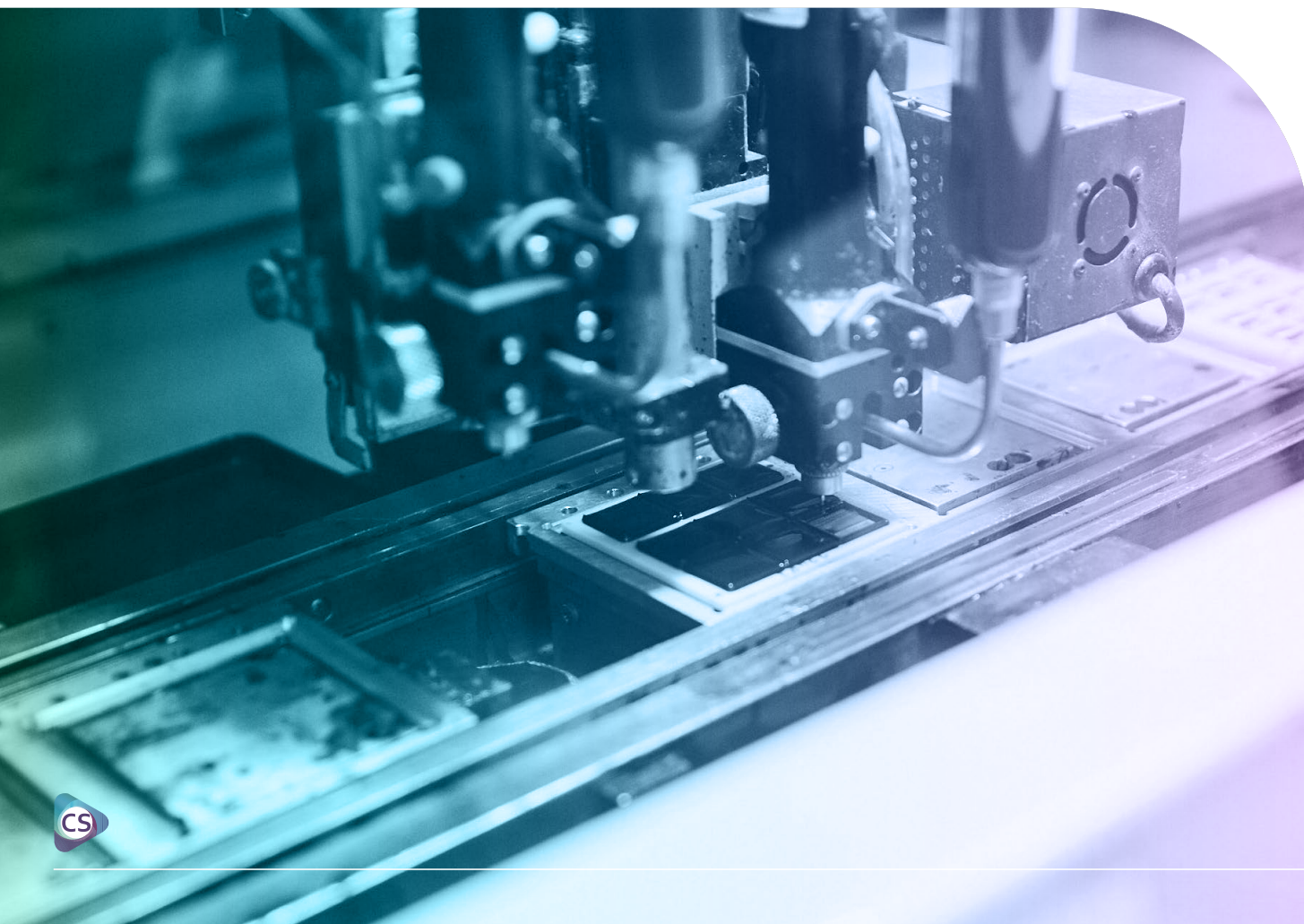
CPD activity

Upskilling and reskilling impact

The suite of courses serves two core purposes:

- ▶ **Upskilling existing employees** within cluster companies – improving specialist knowledge and supporting progression.
- ▶ **Reskilling professionals** from adjacent industries who are exploring a transition into the semiconductor sector.

Approximately **40% of learners from outside the cluster**



Course spotlight

Compound Semiconductor Electronics (2-part course)

- ▶ Strong participation and consistently positive feedback.
- ▶ Blended model: **4 hours' online content** followed by an **in person practical workshop**.
- ▶ Target participants: individuals at any career stage (students/educators/existing professionals/supply chain partners) seeking to upskill, retrain in the semiconductor/compound semiconductor sector.
- ▶ Content focused on foundational understanding and real world context. Covering semiconductor materials, device fabrication and applications. Includes current and future societal and commercial impact of compound semiconductor technologies.
- ▶ Part two of this course is an in-person interactive workshop.

Pathway into Semiconductors

- ▶ A fully funded, three-day programme introducing the South Wales compound semiconductor industry and its career opportunities.
- ▶ Piloted in 2026 for professionals outside the sector, specifically career changers, including engineers affected by redundancy/change in career direction. Sector targets: the armed forces, automotive, aviation and manufacturing, focusing on transferable skills rather than prior sector knowledge.
- ▶ Provides insight into the compound semiconductor supply chain, typical engineering roles and the skills sought by cluster employers.
- ▶ Includes hands-on activities, VR experiences, an industry site visit and direct engagement with professionals and HR/recruitment teams with ongoing development through CPD courses in areas such as compound semiconductor electronics and photonics.

Communications and marketing impact in 2025

Throughout 2025, communications and marketing activity focused on reinforcing CSconnected's position as the recognised voice of the UK compound semiconductor sector, while clearly articulating the outcomes and impact of SIPF investment as the programme reached its final phase.

Activity prioritised engagement with UK and devolved governments, industry, investors and international partners, ensuring that the South Wales cluster's economic, technological and skills contributions were visible, credible and well evidenced. Communications also supported SIPF delivery across supply chain development, skills and inward investment, aligning messaging around resilience, sovereignty and long term economic value.

Events and engagement



Media and external comms content



Official and governmental visits



Five year communications overview

Over the five years of SIPF delivery, communications activity evolved in line with the maturity of the programme and the cluster itself.



Establishing identity (2021-2022)

Early activity focused on building recognition of South Wales as the world's first compound semiconductor cluster and establishing a shared narrative across industry, academia and government. Compound semiconductors were positioned as critical enabling technologies for net zero, telecommunications, healthcare, defence and future mobility.



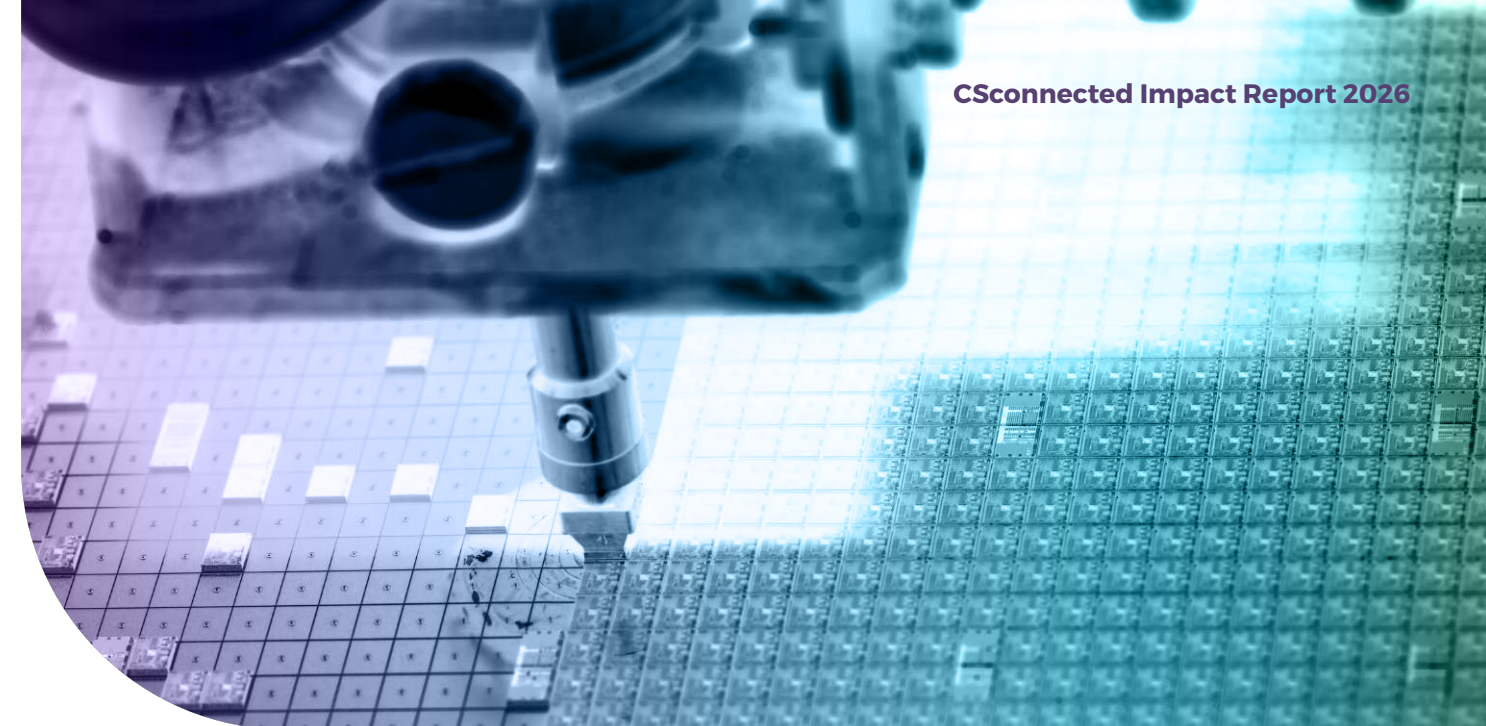
Growing influence and visibility (2023)

CSconnected became increasingly prominent in national policy discussion surrounding the UK Semiconductor Strategy and was regularly engaged by policymakers, international delegations and global industry stakeholders. Communications emphasised the strategic importance of place based industrial clusters in delivering sovereign capability.



Demonstrating impact and value (2024-2025)

As the programme matured, communications became increasingly evidence led, focusing on independently validated economic impact, productivity, exports, skills development and capital investment. Activity supported major investment announcements and reinforced confidence among global partners.



A consistent thread

Across the full SIPF period, communications and marketing activities have:

- ▶ Positioned CSconnected as a trusted, authoritative voice for the compound semiconductor sector
- ▶ Enabled effective engagement between government, industry and academia
- ▶ Amplified the impact of SIPF investment beyond project outputs
- ▶ Supported the transition from programme delivery to long term cluster sustainability

“CSconnected is recognised not only as a regional success, but as a national asset within the UK’s semiconductor landscape.”

Case study: Innovation and R&D Breakthrough

How SIPF enabled IQE to scale epitaxy to next generation wafer sizes



Over the past five years, IQE has used SIPF funding to deliver major advances in epitaxial wafer manufacturing, enabling the company to scale critical technologies and strengthening the UK's compound semiconductor ecosystem. The programme has been especially important in supporting transitions from legacy wafer diameters to emerging global standards.

A cornerstone of this work was the successful scale up of indium phosphide epitaxy from 3–4 inch wafers to full 6-inch (150 mm) production. Previously, all commercial manufacturing was constrained to smaller wafer sizes, and scaling required significant process redevelopment, equipment adaptation, and validation. With SIPF support, IQE developed and qualified 150 mm processes that deliver material quality and uniformity equal to – or better than – its established 100 mm lines, placing the company ahead of global competitors now beginning similar transitions.

SIPF also enabled IQE to pioneer the world's first 8-inch (200 mm) VCSEL epitaxy capability, on both GaAs and Ge substrates, supporting the continued expansion of compound semiconductor applications. Device performance has been independently validated through collaboration with Cardiff University, while IQE retains proprietary manufacturing know how. This positions the company to respond rapidly as markets such as 3D sensing, LiDAR and photonics move toward larger wafers and greater economies of scale.

Beyond individual breakthroughs, SIPF strengthened collaboration across South Wales, supporting shared research with universities and industry partners and reinforcing the region's international reputation as a leading compound semiconductor cluster.



Case study: Collaboration and ecosystem success

How SIPF enabled KLA to accelerate photonics and power technology development



KLA's participation in SIPF has delivered significant progress in both manufacturing capacity and advanced semiconductor process development, reinforcing South Wales as a hub for photonics and power technologies. The programme combined near term commercial priorities with longer term exploratory research to support future markets.

A major outcome of SIPF was the expansion of KLA's manufacturing footprint. The company developed a new and expanded facility near Junction 28 of the M4 corridor, co located with key cluster partners including IQE and the CSA Catapult. This investment increased throughput, strengthened supply chain integration, and provided the physical infrastructure required to scale new hardware platforms and advanced processes.

Technically, SIPF enabled substantial advances in gallium arsenide VCSEL etching, indium phosphide processing, and next generation inductively coupled plasma (ICP) reactor design. Access to large volumes of epitaxial material, far beyond what customers typically supply, gave engineers deep insight into layer behaviour, enabling improved uniformity, profile control, and management of complex aluminium containing layers. These developments reached technology readiness levels appropriate for commercial deployment.

Exploratory work under SIPF also addressed emerging materials and processes, including gallium oxide, plasma dicing, and silicon carbide trench etching, positioning KLA for future opportunities in power electronics and advanced materials. Close collaboration with Cardiff University, Swansea University, IQE and CSA Catapult helped embed this work within the wider South Wales ecosystem, strengthening collective capability and resilience.

Case study: Capability expansion

How SIPF enabled Microchip to establish new UK power electronics and MMIC capabilities

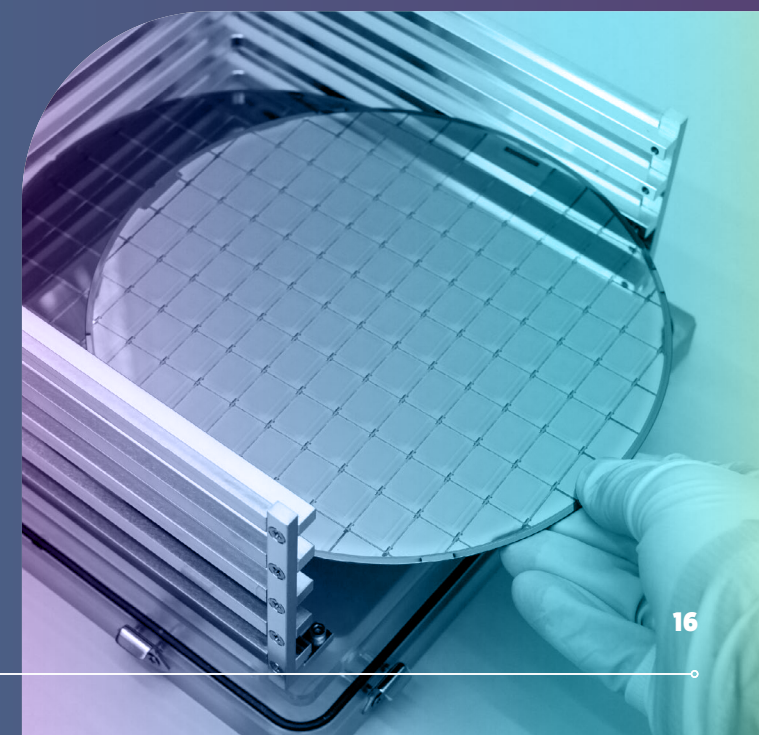


SIPF funding transformed Microchip's Caldicot site, enabling the creation of new power electronics and advanced packaging capabilities where none previously existed. Before SIPF, the site lacked the equipment, specialist expertise required to enter these strategically important technology areas.

With SIPF's matched funding model and capital support, Microchip successfully built a compelling internal business case, securing approval to transfer manufacturing and pilot line capability to the UK. The company invested £3-4 million in new equipment and recruited specialist engineers, allowing Caldicot to fabricate, assemble and test high voltage silicon carbide devices for the first time. Several products are now in advanced development, with some reaching pre qualification and others progressing into manufacture.

A key achievement was the establishment of a high voltage power module pilot line capable of operating at 1.2-3 kV and up to 1000 amps. This required specialist low thermal resistance assembly equipment alongside advanced electrical and thermal simulation tools, creating an integrated design build test workflow not previously available at the site.

Through collaboration with universities and CSconnected partners, Caldicot has become a recognised "added value" Microchip site, strengthening UK semiconductor capability and supply chain resilience.



Strategic priorities



Future outlook: 2026 and beyond

“SIPF has enabled CSconnected and the wider ecosystem not just to grow, but to safeguard the future of UK manufacturing in advanced technologies. It has supported businesses to scale and innovate, powered world-leading research, and fostered collaboration, while creating high-value careers and skills pathways that would not otherwise exist. With a strong track record and new funding programmes ahead, **the cluster is well placed to target new milestones on its path to 2030.**”

“Compound semiconductors are central to the next global technology shift, **delivering performance that silicon alone cannot achieve.** As 6G, AI, electrification, autonomous vehicles and net-zero energy systems accelerate, materials such as GaN and InP will enable faster networks, more efficient power electronics and resilient infrastructure – **driving long-term economic growth and positioning the UK to compete at the forefront of global innovation.**”

Wyn Meredith
Chair
CSconnected

Market opportunities

The compound semiconductor sector sits at the forefront of the next wave of global technology transformation. As digital infrastructures evolve and sustainability imperatives intensify, compound semiconductors will play a critical enabling role across multiple high-growth markets, offering performance advantages that traditional silicon cannot deliver alone.

In telecommunications, the transition towards **6G** will drive demand for higher-frequency, higher-power and lower-latency devices, positioning compound materials such as gallium nitride (GaN) and indium phosphide (InP) as foundational technologies for future network architectures. Similarly, the rapid acceleration of **artificial intelligence** – from data centres to edge computing – will increase the need for efficient power management, photonics and high speed interconnects, areas where the sector already demonstrates global leadership.

The **automotive** transition towards electrification, autonomy and advanced driver-assistance systems presents significant opportunities, particularly in **power electronics, radar and advanced sensing**. Compound semiconductors enable faster switching, higher efficiency and improved thermal performance, supporting extended vehicle range, reduced energy losses and enhanced safety. In parallel, the shift to a net zero economy is accelerating adoption of compound semiconductor technologies in **renewable energy, grid infrastructure and energy storage**, underpinning smarter, more resilient power systems.

The UK's **IS-8 ambitions** signal strong national intent to secure a strategic position in this globally competitive sector, building on existing strengths in research, manufacturing capability and innovation clusters. This ambition aligns with international strategies being pursued by the United States, Europe and key Asian economies, all seeking greater technological sovereignty and supply-chain resilience.

The compound semiconductor sector is a driver towards technological progress, as well as being the cornerstone of future economic growth, resilience and global competitiveness.

Membership and governance

CSconnected membership model overview

The CSconnected membership model was established in 2025. It is designed to enhance the connections and depth of relationships between organisations across the compound semiconductor ecosystem. Members represent research, innovation, manufacturing and the wider supply chain. The membership model will strengthen collaboration and accelerate regional and sector-wide growth.

Benefits include access to specialist skills and outreach activities, access to exclusive events and industry roundtables that help organisations raise their profile and engage with key stakeholders.

Open to organisations directly involved in compound semiconductor technologies, as well as those whose products and services are enabled by them. While the cluster is rooted in South Wales, CSconnected recognises that impactful collaboration often

extends beyond political boundaries. Organisations located within 20 miles of South Wales, employing a significant proportion of South Wales-based staff, or engaged in major collaborative R&D or supply chain activity with cluster partners may also qualify for membership.

Membership type and cost are determined by factors such as organisational size, location and role in the ecosystem, with SME status defined according to the European standard of fewer than 250 employees and/or turnover under £44m.

Through curated introductions, coordinated promotion, and strategic stakeholder engagement, CSconnected ensures its members benefit from a unified cluster voice at regional, national and international levels – creating practical opportunities for growth, innovation and long term impact.



Core members

Core members are a subset of connected members and are 'By Invitation Only', selected by the Cluster Steering Board.



Connected members

Companies based in and around South Wales and involved in the advanced semiconductor industry.



Network members

Semiconductor companies based outside of the CSconnected cluster region.



Service sponsors

Companies that supply services or products to the cluster but are not involved with semiconductors.



Thanks to our SIPF partners

