DSCI
PROMOTING DATA PROTECTION

State of India's Semiconductor Industry 2026

Capacity, competitiveness, and trust across the chip value chain



Executive summary

Five of twelve approved plants are producing and a larger second phase of policy is funded. The next phase will turn on converting capital, suppliers and talent into a competitive and trusted industry.

Where the programme stands

As of September 2026, five of the twelve units approved under the ISM are in commercial production, Micron is exporting finished memory from Sanand, and the Union Cabinet approved the second phase (Semicon 2.0) in July 2026 with ₹1,27,500 crore (US$13.4 bn).[1,2,13] The five operating units are 42% of approved projects but hold only about a fifth of the ₹1,63,659 crore (US$17.2 bn) investment pipeline; the two Tata Electronics projects, with 72% of committed capital, are still under construction.

The stakes are rising. The import bill grew at 23% a year from FY17 to FY25, and electronics production reached ₹13,11,000 crore (US$138 bn) in FY26, so domestic demand for chips is growing faster than domestic supply.[34,35] Globally, WSTS expects sales of ₹1,43,45,000 crore (US$1,510 bn) in 2026 on an AI-driven memory surge; India's market, about ₹5,89,000 crore (US$62 bn) in 2026, is roughly 4% of that total.[23,27] The most durable signal is the arrival of suppliers: Applied Materials, Lam Research and Fujifilm committed to Indian capacity during 2025–26, and suppliers tend to commit only when they expect a lasting customer base.[11,12]

Principal findings

#	Finding	Evidence (period)
1	**Progress is visible in output, not only policy.**	Operating units rose from three to five in July–September 2026; India-assembled DRAM and NAND ship worldwide.[1,13]
2	**Count is ahead of capital.**	Operating units hold 21.0% of pipeline value; Dholera and Jagiroad, with 72%, are the next milestones (September 2026, DSCI analysis).
3	**Lead times are compressing.**	Approval-to-production fell from about 32 months (Micron, 2023–26) to 13 months (CDIL, 2025–26) (DSCI analysis).
4	**The strategy is an ecosystem strategy.**	The second phase (July 2026) rests on six pillars, with design first and equal standing for equipment, packaging, research and talent.[8]
5	**Design talent is the established advantage.**	About 20% of the world's chip design engineers (2025); first commercial wafer due in 2028.[38,42]
6	**The map is widening beyond Gujarat.**	Five more states host ISM-approved plants (September 2026); state top-ups lift combined support to 70–80% of cost.[31]
7	**Headline commitments overlap.**	The ₹1,63,659 cr (US$17.2 bn) pipeline, about ₹1,00,000 cr (US$10.5 bn) of second-phase commitments and SEMI India's tally measure different things and should not be summed.[5,10]
8	**Talent focus is moving to the factory floor.**	About 70,000 design engineers trained in 2022–26; next target is one lakh technicians.[9]
9	**Trust is the next measure of progress.**	Where a chip comes from, who can update it and whether it can be verified will matter alongside how many are made (Part four).

Where India can lead

India can accelerate its advantage through targeted specialisation: packaging, compound semiconductors, design and the supplier layer offer the strongest pathways. The premise is to build the ecosystem, not only the fab.

1 Specialise	2 Localise	3 Skill	4 Own
Compete in packaging, compound devices and design, not the leading edge	Build the gases, chemicals, parts and tools around every plant	Train technicians on production tools, where plants need them	Turn design talent into Indian products and IP

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About this report

Building, shipping and competing: the state of India’s semiconductor industry

Semiconductors sit beneath almost every modern system, from phones and vehicles to power grids and defence platforms. India consumes a fast-growing share of the world’s chips but imported 90–95% of what it used in FY25, at a cost of ₹2,87,850 crore (US$30.3 bn).[3,4] Between December 2021 and July 2026 the Government of India committed ₹2,03,500 crore (US$21.4 bn) across two phases of the India Semiconductor Mission (ISM), and the first plants are now shipping product.[2,4]

This report takes an industry view of where that effort stands as of September 2026. It moves through four parts and closes with separate appendices:

Part	What it covers	Chapters
Part one: The landscape	The market, the government’s six-pillar strategy and the national agenda	02–04
Part two: The players and the places	Indian and global companies, the value chain, the state map and the investment pipeline	05–08
Part three: The capabilities and the path	Talent, start-ups, capital and India’s technical position against global benchmarks	09–10
Part four: Trust, security and self-reliance	Supply resilience, cybersecurity, ecosystem capability, AI compute and ecosystem mapping	11–16
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Why a security lens on semiconductors

Most assessments of India's chip programme ask how much capacity is being built. This report goes one step further and asks whether the chips that banks, telecom networks, power grids, defence platforms and AI data centres rely on can be trusted, sourced in a crisis and verified. A chip passes through many hands, in many countries, between design and deployment, and a compromise at any stage may reach a critical system before conventional cyber controls can detect it. Unlike software, a flaw built into silicon or low-level firmware cannot simply be patched once the chip is deployed, and a single compromised design can be replicated across thousands of devices. Attacks have already reached fab tools, suppliers and customers' intellectual property. As AI data centres gather the most valuable chips in the densest configurations, the cost of a compromise is rising further.

For DSCI, this is a natural extension of its work. Cybersecurity has long been built at the level of networks, applications and data; it now must reach the hardware those layers run on. India is building its first fabs and packaging lines today, which makes this the moment when security can be designed in rather than added later. Drawing on DSCI's work on critical technologies, including TechSagar, the report extends the bottom-up technology radars already maintained for supercomputing, electric vehicles and 6G to semiconductors (Chapter 16).

Scope, currency and conventions

Status is as of September 2026. Figures come from government releases, market researchers and company statements, each with a numbered citation. All money values are shown in ₹ crore with the US$ billion equivalents in brackets, converted at ₹95 per US dollar (the September 2026 average). Every derived number is labelled **DSCI analysis,** and its working is shown beside it and in Appendix B. The report does not endorse any company.

India’s semiconductor moment in six numbers

₹1,27,500 crore
second-phase outlay (US$13.4 bn), approved July 2026; 68% more than the first phase[2]

5 of 12
approved manufacturing units in commercial production, September 2026[1]

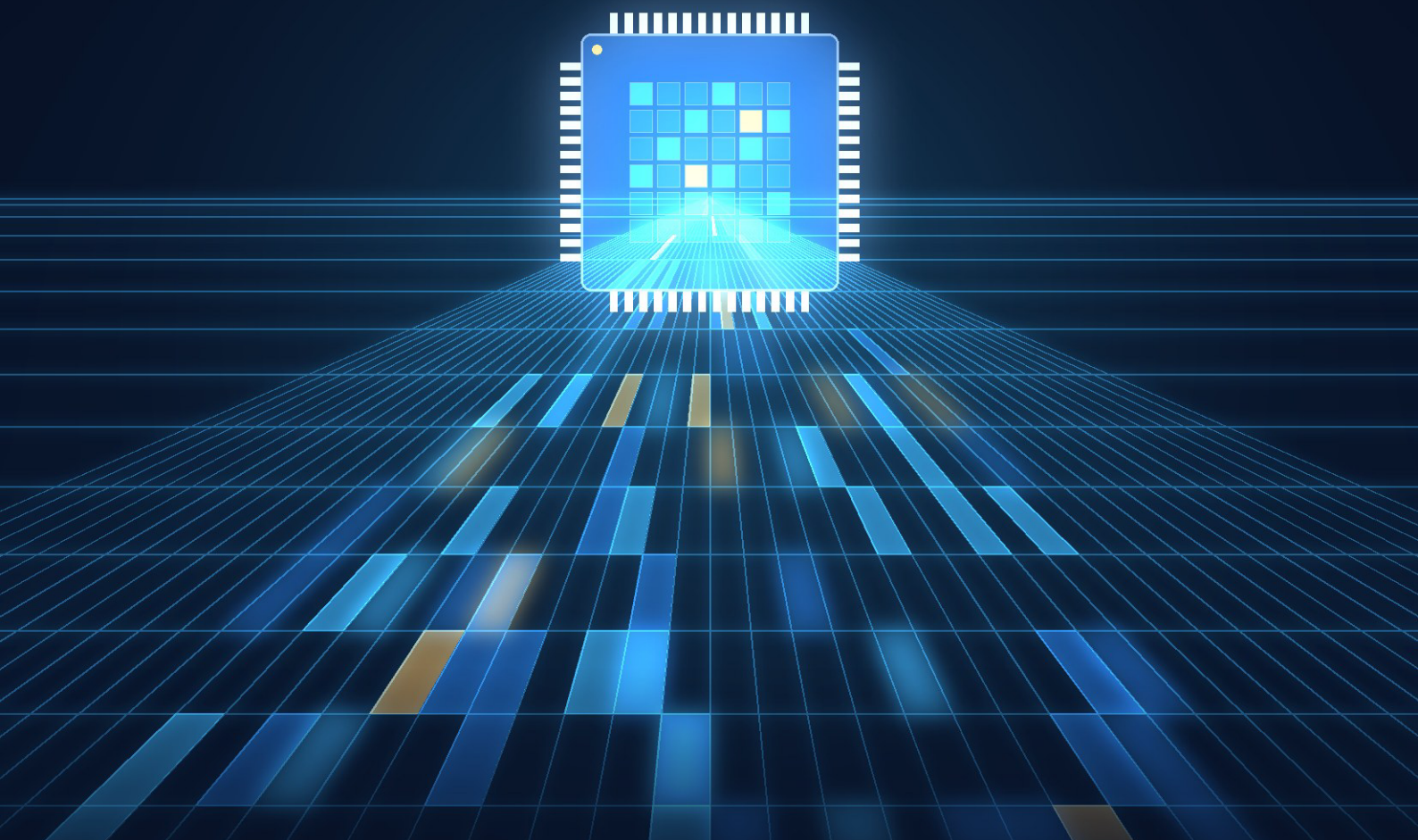
2.2×
approved project investment drawn per rupee of first-phase outlay, December 2021 to September 2026 (DSCI analysis)[4]

₹2,87,850 crore
semiconductor import bill in FY25 (US$30.3 bn), up from ₹54,150 cr (US$5.7 bn) in FY17[34]

~20%
of the world’s chip design engineers work in India (2025)[38]

₹14,72,500 crore
projected Indian chip market in 2031 (US$155 bn), from ₹5,89,000 cr (US$62 bn) in 2026[27]





Part one

The landscape

A market in an AI-driven super-cycle, a government strategy in its second phase, and the national agenda for the next phase.

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03 Leadership priorities: setting the national agenda 17

01

Market context: India and the global industry

The global market is surging, and India's demand is outrunning its supply.

₹1,43,45,000 crore	₹5,89,000 crore	90–95%
forecast global chip sales in 2026 (US$1,510 bn)[23]	India's semiconductor market in 2026 (US$62 bn)[27]	of India's chip demand met by imports (FY25)[34]

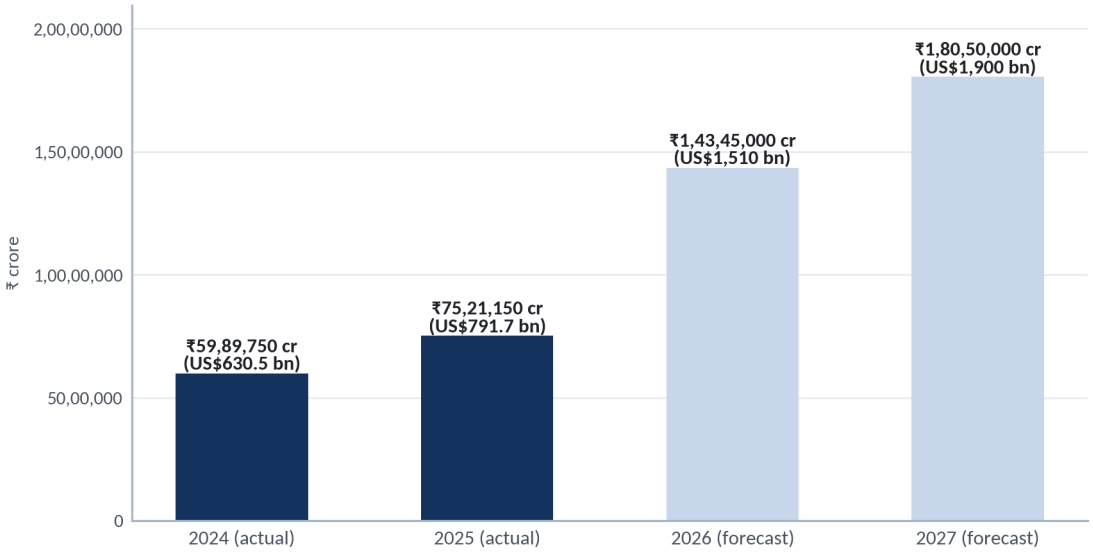
The global market has outrun earlier forecasts

For most of the past decade the industry's reference milestone was a market of ₹95,00,000 crore (US$1,000 bn) by 2030. It will be passed in 2026. Global sales reached ₹75,21,150 crore (US$791.7 bn) in 2025, up 25.6% on 2024, and the WSTS Spring 2026 forecast projects ₹1,43,45,000 crore (US$1,510 bn) for 2026 and about ₹1,80,50,000 crore (US$1,900 bn) for 2027. The August 2026 update, using actual first-half results, lifts these to about ₹1,57,70,000 crore (US$1,660 bn) and ₹1,99,50,000 crore (US$2,100 bn).[23,24,43]

Growth is skewed. Memory is forecast to rise about 250% in 2026, to more than ₹76,00,000 crore (US$800 bn), as AI accelerators absorb high-bandwidth memory, against about 37% growth in logic.[23] For India this lifts the value of memory assembly at Sanand today but exposes any memory-linked business case to a later price correction.

Figure 1. Global chip sales will nearly double in 2026 on AI-driven memory demand

Global semiconductor sales, ₹ crore (US$ billion), calendar years 2024–2027



N = 4 annual observations (2 actual, 2 forecast)

Note: Forecasts are the WSTS Spring 2026 figures; the August 2026 update raises 2026 to ₹1,57,70,000 cr (US$1,660 bn). Converted at ₹95 per US$ (DSCI analysis: US$ bn × 9,500 = ₹ crore).

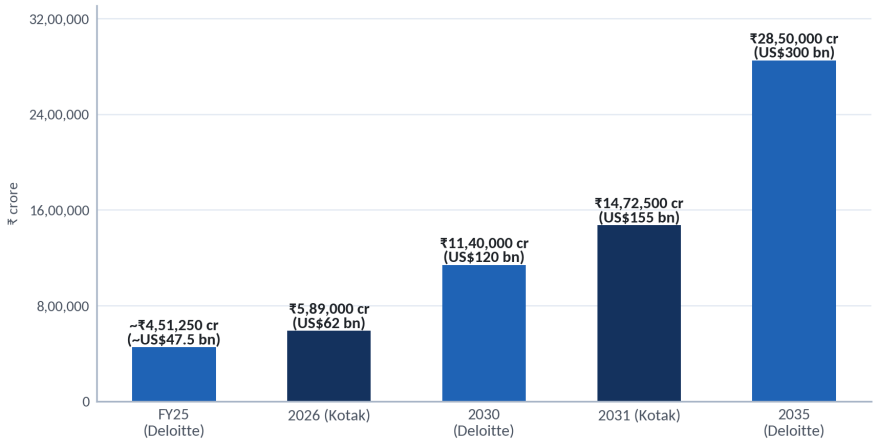
Source: SIA (2024 and 2025 actuals); WSTS Spring 2026 forecast and Q2 2026 update.[23,24,43]

India's market: rapid growth from a modest base

Kotak Mahindra Mutual Fund estimates India's semiconductor market at about ₹5,89,000 crore (US$62 bn) in 2026, rising to ₹14,72,500 crore (US$155 bn) by 2031, a compound growth rate of about 20% a year.[27] Deloitte's TMT Predictions 2026 puts the market at ₹4,27,500 cr (US$45 bn)–₹4,75,000 cr (US$50 bn) in FY2024–25, reaching ₹11,40,000 crore (US$120 bn) by 2030 and ₹28,50,000 crore (US$300 bn) by 2035, by which time it expects domestic production to meet more than 60% of demand.[74] Both paths point the same way: India's market more than doubles within five years.

Figure 2. Independent estimates put India's chip market at 2.5–5 times its 2026 size within a decade

India semiconductor market, ₹ crore (US$ billion), published estimates for FY2024–25 to 2035



N = 5 published estimates from 2 independent sources

Note: FY25 shows the mid-point of Deloitte's US$45–50 bn range. Growth rates are DSCI analysis: Kotak (155 ÷ 62)^(1/5) − 1 = 20.1% a year (2026–31); Deloitte (300 ÷ 120) ^(1/5) − 1 = 20.1% a year (2030–35). Teal: Kotak; light teal: Deloitte.

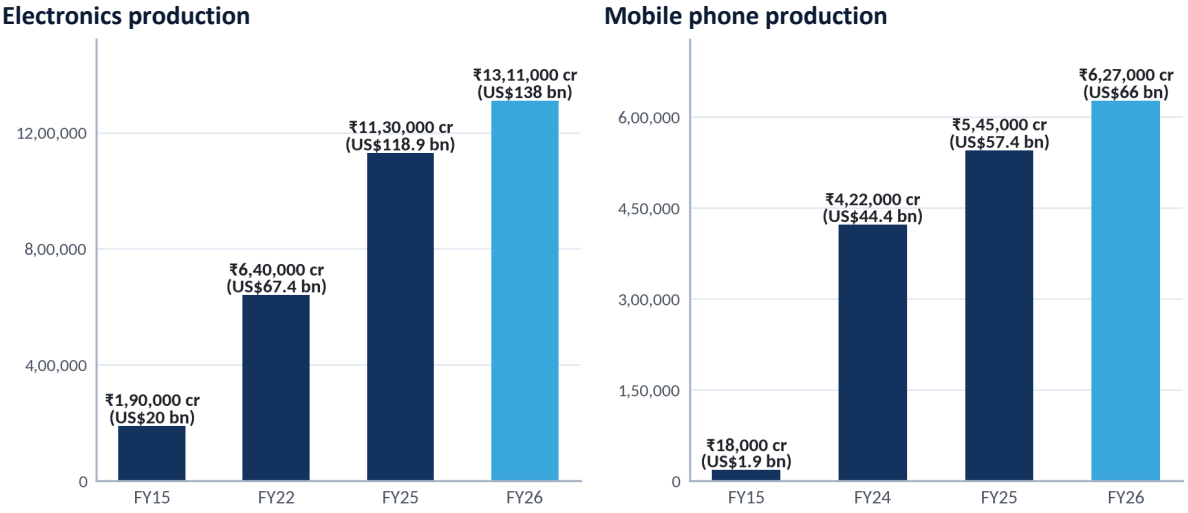
Source: Kotak Mahindra Mutual Fund, via NewsBytes (August 2026); Deloitte, TMT Predictions 2026, via Swarajya (March 2026).[27,74]

Demand is outrunning domestic supply

Electronics production rose from ₹1,90,000 crore (US$20 bn) in FY15 to ₹13,11,000 crore (US$138 bn) in FY26, almost sevenfold, and mobile phone production from ₹18,000 crore (US$1.9 bn) to ₹6,27,000 crore (US$66 bn). In FY26 India made about 99% of the phones it sold and exported ₹4,24,000 crore (US$44.6 bn) of electronics.[35,36]

Figure 3. Electronics output has grown almost sevenfold in just over a decade

Production value, ₹ crore (US$ billion), selected financial years FY15–FY26



N = 4 financial-year observations per panel

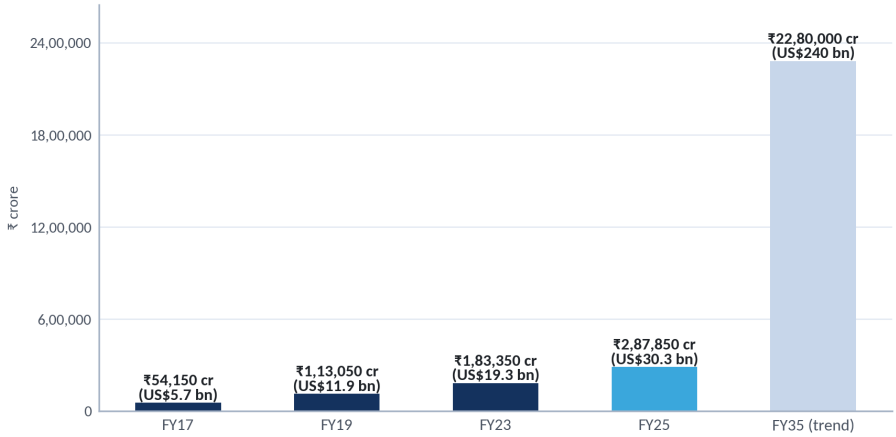
Note: DSCI analysis: ₹13,11,000 crore ÷ ₹1,90,000 crore = 6.9 times (FY15 to FY26).

Source: MeitY reply in the Lok Sabha (FY15, FY26); Economic Survey 2025–26 (FY22, FY25); MeitY (FY24).[35,36,39]

Almost all the chips inside those products are imported. The semiconductor import bill rose from ₹54,150 crore (US$5.7 bn) in FY17 to ₹2,87,850 crore (US$30.3 bn) in FY25, and India spent close to ₹14,25,000 crore (US$150 bn) on chip imports over those nine years. NITI Aayog estimates the bill could reach ₹22,80,000 crore (US$240 bn) by FY35 if the trend holds.[34] Total electronics imports crossed ₹11,02,000 crore (US$116 bn) in FY26, and domestic value addition in electronics remained around 18–20%.[37]

Figure 4. India's chip import bill grew more than fivefold between FY17 and FY25

Semiconductor imports, ₹ crore (US$ billion), FY17–FY25 actuals and FY35 trend projection



N = 4 financial-year actuals and 1 projection

Note: DSCI analysis: growth FY17–FY25 = (30.3 ÷ 5.7) ^ (1/8) − 1 = 23.2% a year; the FY35 value is NITI Aayog's trend projection, which DSCI analysis reproduces as 30.3 × 1.232^10 ≈ US$240 bn. A trend projection, not a forecast.

Source: NITI Aayog, Future of India Semiconductor Industry (May 2026); MeitY estimates.[34]

How India compares with the global industry

Table 1. India is a volume-and-localisation story; the global market is a price-and-mix story

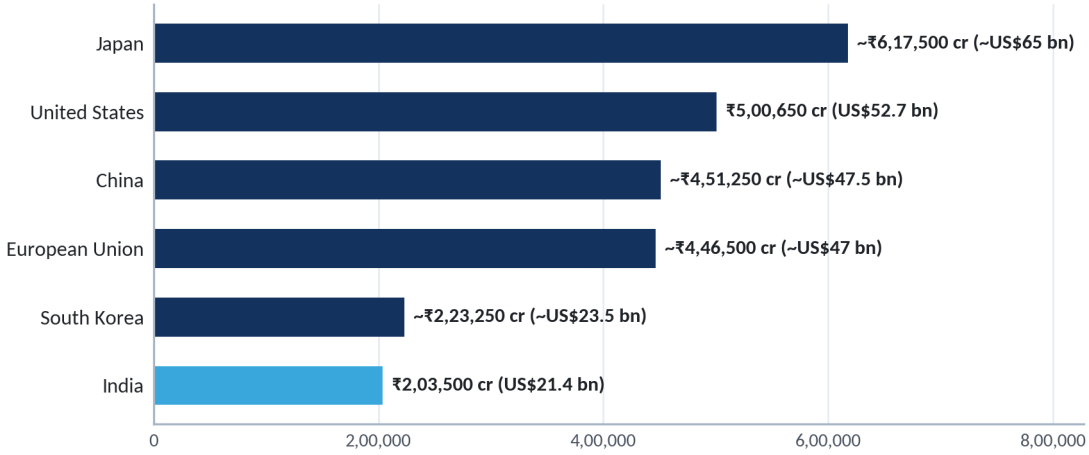
Six dimensions framing the domestic market within the global industry, latest available year

Dimension	India	Worldwide	Implication
Market size	₹5,89,000 cr (US$62 bn) (2026) to ₹14,72,500 cr (US$155 bn) (2031)	₹75,21,150 cr (US$791.7 bn) (2025); ₹1,43,45,000 cr (US$1,510 bn) (2026F)	India ≈ 4% of 2026 global sales (DSCI analysis: 62 ÷ 1,510; indicative, as India's figure measures consumption)
Growth driver	Volume and localisation: electronics, EVs, data centres	Price and mix: memory up ~250% in 2026	India's curve is capacity-led; the global curve is cycle-exposed
Import dependence	₹2,87,850 cr (US$30.3 bn) of chip imports (FY25); 90–95% of demand	Leading-edge supply concentrated in Taiwan and South Korea	Every plant localised cuts a fast-growing import bill
Manufacturing	12 approved units (1 silicon fab, 2 compound fabs, 9 packaging); 5 operating (Sept 2026)	Taiwan leads advanced chips; China leads mature-node capacity	Near-term strength is back-end and specialty
Design talent	~20% of world's chip design engineers (2025)	Structural shortages in established hubs	India's most defensible advantage
Strategic focus	Advanced packaging, glass substrates, SiC and GaN, memory ATMP, RISC-V IP	Sub-2 nm logic, HBM, AI accelerators, chiplets	India targets adjacencies, not the leading edge

Source: WSTS; SIA; Kotak Mahindra Mutual Fund; NITI Aayog; MeitY; ISM.[23,24,27,34,35]

Figure 5. Public funding envelopes for semiconductors differ widely in scale

Headline government funding envelopes (grants, capital subsidies and state-backed funds), ₹ crore (US$ billion), as announced 2021–2026



N = 6 economies

Note: Japan: ¥10 trillion AI and semiconductor framework to FY2030. United States: CHIPS Act. China: National IC Fund Phase III. EU: Chips Act (€43 bn). South Korea: ₩33 trillion package. Foreign US$ values are as reported at announcement (EU converted at about US$1.09 per euro; South Korea at about ₩1,400 per US$), then converted to ₹ at ₹95. India: ₹76,000 crore (first phase, 2021) + ₹1,27,500 crore (second phase, 2026) = ₹2,03,500 crore; DSCI analysis: 2,03,500 ÷ 9,500 = US$21.4 bn. Durations, instruments and scope differ.

Source: CNBC; US Senate Commerce Committee; Business Standard (Reuters); European Commission; SCMP (Reuters); ISM.[2,4,46,47,75,76,77]

Implications

Because India's demand is driven by volume and localisation rather than by the price cycle now lifting global sales, domestic supply has a structural market however the memory boom resolves; the exposure sits mainly with business cases tied to memory prices.

With the import bill compounding at 23% a year (FY17–FY25), each plant that localises supply reduces a strategic exposure as well as a trade deficit, a theme Part four returns to.

02

Six pillars of the Government of India's strategy

The Government of India is building an ecosystem, not just fabs. Continuity between the two phases of the mission is itself a signal to investors.

₹2,03,500 crore
committed across both phases of the mission, 2021–26 (US$21.4 bn)[2,4]

6 pillars
design, machines and materials, fabs, packaging, R&D and talent (2026)[8]

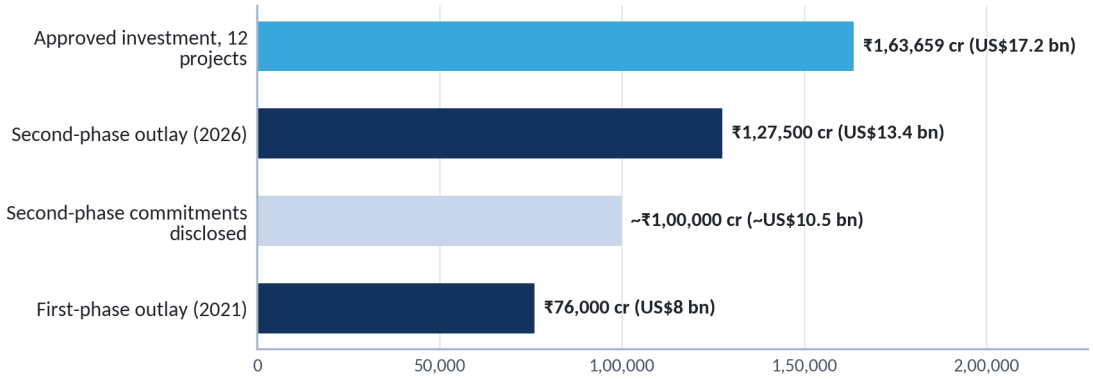
50%
central fiscal support on eligible project cost[4]

Key milestones of the mission, 2021–2026

Dec 2021	Jun 2023	Feb 2026	Jul 2026
Semicon India programme approved with ₹76,000 crore (US$8 bn)[4]	First manufacturing project approved: Micron, Sanand[4]	Micron Sanand begins commercial production[13]	Cabinet approves the second phase with ₹1,27,500 crore (US$13.4 bn)[2]

Figure 6. Each rupee of first-phase outlay has drawn about ₹2.2 of approved investment

Public outlay and the investment it has drawn, ₹ crore (US$ billion), December 2021 to September 2026



N = 4 values: 2 public outlays, 12 approved projects (aggregated) and 1 disclosed commitment total

Note: Second-phase commitments are as disclosed in September 2026; the firms are unnamed.

Source: ISM; Cabinet releases; Deccan Chronicle.[2,4,10]

Why it matters: the 2.2× multiplier

Each rupee of first-phase outlay has drawn about ₹2.2 of approved project investment. A useful measure of the second phase may be whether it draws suppliers and designers, not only more plants.

Calculation: approved investment across the 12 ISM manufacturing projects (to September 2026) ÷ first-phase outlay (December 2021) = ₹1,63,659 crore ÷ ₹76,000 crore = 2.15, rounded to **2.2**. In dollar terms: US$17.2 bn ÷ US$8.0 bn.

Source: DSCI Insights, based on Cabinet approval values and ISM programme data.[3,4]

India Semiconductor Mission: from foundation to scale

Table 2. The second phase is 68% larger and covers the whole ecosystem

The two phases of the India Semiconductor Mission compared, status September 2026

Feature	First phase (Semicon 1.0)	Second phase (Semicon 2.0)
Approval	December 2021	Budget 2026–27; Cabinet approval July 2026; schemes notified August 2026
Outlay	₹76,000 crore (US$8 bn)	₹1,27,500 crore (US$13.4 bn), +68% (DSCI analysis: 1,27,500 ÷ 76,000 − 1)
Orientation	Anchor fab and OSAT units; design-linked incentives; design talent	Whole ecosystem across six pillars, with design first
Results or targets	12 projects; pipeline of ₹1,63,659 cr (US$17.2 bn) (2.2× outlay) 5 operating (Sept 2026); 105 firms given design tools ~20 start-ups raised ~₹800 cr (US$0.08 bn) of venture capital; 70,000 engineers trained (2022–26)	200+ design start-ups and companies; 1 lakh technicians ~₹1,00,000 cr (US$10.5 bn) of commitments (Sept 2026) close to 1 lakh jobs over 2026–29
Support model	Up to 50% fiscal support on project cost, with state top-ups	Co-investment and ecosystem incentives; application guidelines are the next signal to watch

Source: ISM; Cabinet and PIB releases; Union Minister's briefings (ANI, ThePrint, BusinessToday).[2,4,7,8,9]

Six pillars of the strategy

The second phase shifts the emphasis from attracting individual plants to building the design houses, suppliers, research base and workforce that make plants competitive.[8,9]

Figure 7. Six pillars define where public support will go

Pillars of the Government of India's semiconductor strategy and stated targets, announced July–September 2026



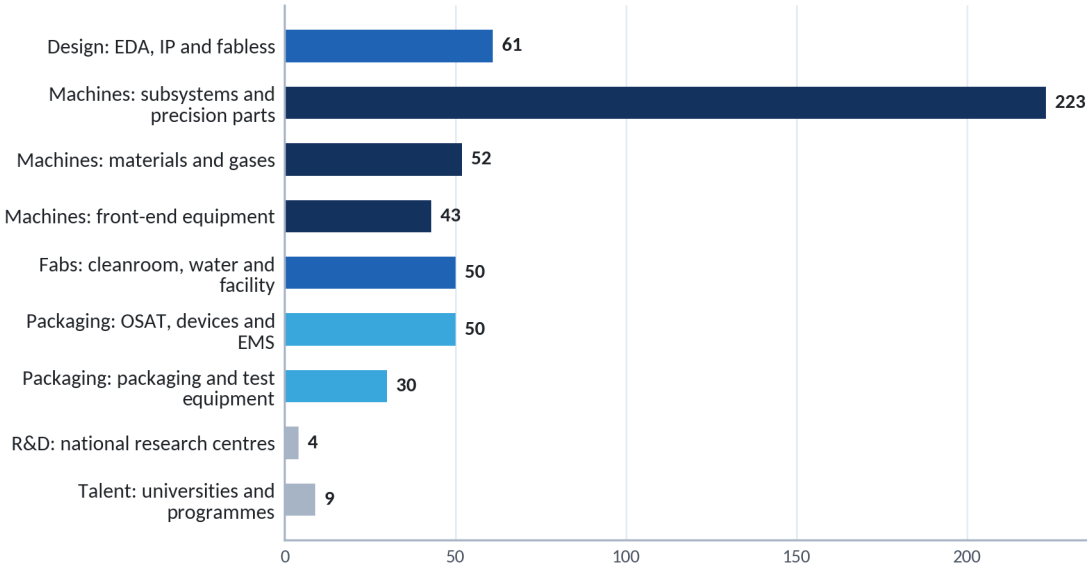
Source: Union Minister's address and briefings; ISM.[8,9]

Industry is already organising around the pillars

To test whether industry is moving where policy points, 542 companies and organisations active in India's semiconductor ecosystem were classified by primary line of business against the six pillars. Of these, 522 map to a single pillar; 20 state agencies and trade bodies support all six.[44] Three findings stand out: suppliers are the largest group (318 firms, 61% of those mapped to a pillar); design is the most start-up-led pillar (43 of 61 firms are start-ups); and 223 subsystem and precision-component makers form a broad base that machines-and-materials incentives can lift towards higher-value work.

Figure 8. Three in five mapped firms serve machines and materials

Companies and organisations in India's semiconductor ecosystem by pillar and segment, number, September 2026



N = 542 organisations mapped; 522 shown (each counted once under its primary line of business)

Note: DSCI analysis: machines and materials = 223 + 52 + 43 = 318; 318 ÷ 522 = 61%. The 20 state agencies and trade bodies that support all six pillars are not shown.

Source: DSCI ecosystem mapping, September 2026.[44]

How the support is structured

Table 3. India's support spans manufacturing, design, components and skills

Main national and state instruments

Instrument	What it supports	Scale or status (Sept 2026)
ISM, first phase	Silicon, compound and display fabs; ATMP and OSAT; design incentives	₹76,000 crore (US$8 bn); 12 projects approved
ISM, second phase	Design, machines and materials, fabs, packaging, R&D and talent	₹1,27,500 crore (US$13.4 bn); schemes notified August 2026
Central fiscal support	Fabs, compound units, ATMP/OSAT, released against milestones	Up to 50% of eligible project cost[4,31]
State top-ups	Capital top-ups plus land, power and water concessions	Gujarat 40%; UP, Tamil Nadu, Odisha 50%; Andhra Pradesh 60% of central amount; combined 70–80% of cost[31,32]
Design Linked Incentive (DLI)	Chip-design start-ups and MSMEs, including design infrastructure	24 projects approved; 23 tape-outs (to June 2026)[26,50]
Chips to Start-up (C2S)	Chip-design training at academic institutions	70,000 engineers trained (2022–26) against an 85,000 goal
Electronics Components Manufacturing Scheme	PCBs, displays, passives and other components	Expanded to ₹40,000 crore (US$4.2 bn) in Budget 2026–27[37]

Source: ISM; Cabinet releases; Union Minister's briefings; The Week; ThePrint (Ideas for India); CSIS.[2,4,8,9,31,32,37]

03

Leadership priorities: setting the national agenda

National priorities for the next phase are clear: judge progress by output, build an ecosystem rather than isolated plants, and pursue self-reliance through trusted partnership.

160 GW+	1 lakh	56
of solar capacity cited as a power-security advantage (2026)[1]	technicians to be trained in the second phase (2026–29)[9]	MoUs, announcements and initiatives at SEMICON India 2026[45]

SEMICON India 2026 (New Delhi, 17–19 September 2026), jointly organised by the ISM and SEMI, brought together more than 600 exhibitors from 52 countries.[5,6] Two more commercial production lines opened during the event, and the roadmap for the second phase was set out. Taken together, the national agenda and industry's response can be read as three strategic priorities.[1,8]

Three strategic priorities for the next phase

1 Judge progress by output	2 Build an ecosystem, not isolated plants	3 Self-reliance through trusted partnership
The programme has moved from policy, through project planning and pilot lines, to commercial production (2022–26). Two more lines opened in September 2026, at CDIL (Mohali) and Suchi Semicon (Surat); Indian-made chips now reach customers at home and abroad. Second-phase commitments of about ₹1,00,000 cr (US$10.5 bn) span equipment, materials, gases, ATMP, substrates and one wafer project, expected over 2026–29 with close to 1 lakh jobs.	Six pillars with design first; at least 200 design firms targeted, against 105 supported in 2022–26. Suppliers of equipment, chemicals, gases and materials invited to build around the 12 approved projects. Talent effort turns to 1 lakh technicians and cleanroom staff; energy security (160 GW+ of solar capacity, 2026) positioned as a location advantage.	Sovereignty over a few critical capabilities; disciplined partnership everywhere else. Partners chosen for complementarity over duplication, and predictability as much as price. India's chip requirement, a broader measure than the market estimates in Chapter 02, put at about ₹9,50,000 cr (US$100 bn) today, rising to ₹19,00,000 cr (US$200 bn).[17]

Source: Government addresses and briefings at SEMICON India 2026 (Ministry of Electronics and IT, Ministry of External Affairs, ISM).[1,7,8,9,10,16,17]

How industry responded

Table 4. Industry answered with supplier, research and talent commitments rather than new fabs

Main signals from industry leaders at SEMICON India 2026

Signal	What industry committed or said (September 2026)
Scale of activity	More than 50 MoUs and major announcements in the first two days, with >₹66,500 cr (>US$7 bn) of investment commitments reported by SEMI India.[5]
Execution	Micron's Sanand output ships worldwide: tens of millions of units in 2026, hundreds of millions guided for 2027.[13]
Supplier and research layer	Applied Materials: ₹47,500 cr (US$5 bn) over 2026–35, with a 140-acre research park. Tata Electronics: 16 MoUs and a 363-acre vendor park at Dholera. Infineon: India headcount up 28% in a year.[11,15,18]
Policy continuity	Continuity between the two phases seen as a key strength; a large domestic customer base as a reason to keep investing.
The main gap	Moving beyond engineering services to owning products and IP, so more of the value created by Indian talent is captured in India.

Source: Addresses and statements by industry leaders, including SEMI, SEMI India, Micron, Applied Materials, Infineon, Tata Electronics and Infosys.[5,11,13,14,15,18]



Part two

The players and the places

Who makes India’s chips, where the industry is clustering, and the capital behind it.

In this section

04 India’s semiconductor players 20

05 Global players and the value chain 24

06 State map: where the industry leads and grows 28

07 Major commitments in the industry 31

04

India’s semiconductor players

A back-end industry today, with a front-end anchor under construction. Most of the capital sits in two flagship projects.

₹1,63,659 crore
approved investment across 12 projects (US$17.2 bn), June 2023–May 2026[4]

9 of 12
approved units are assembly, test and packaging plants (Sept 2026)[4]

13 months
CDIL’s approval-to-production time (2025–26), the fastest for units approved before 2026 (DSCI analysis)[1]

India’s industry is best read in three layers. **Manufacturing**: twelve ISM-approved projects, from Tata Electronics’ ₹91,000 crore (US$9.6 bn) fab at Dholera to CDIL’s ₹117 crore (US$0.01 bn) power-discrete line at Mohali, plus Sahasra Semiconductors’ ATMP unit at Bhiwadi, opened in May 2026 under a separate scheme.[3,4,31] **Design**: the India centres of global chip companies, which employ most of the country’s chip engineers, and a smaller group of Indian product firms such as L&T Semiconductor Technologies, which showcased 40 products in September 2026.[20,33] **Suppliers** of equipment, materials and gases, which are only now arriving.

Figure 9. India’s players cluster in packaging, with the first fab and suppliers arriving
Leading players in India by value-chain stage, and India’s position at each stage, September 2026

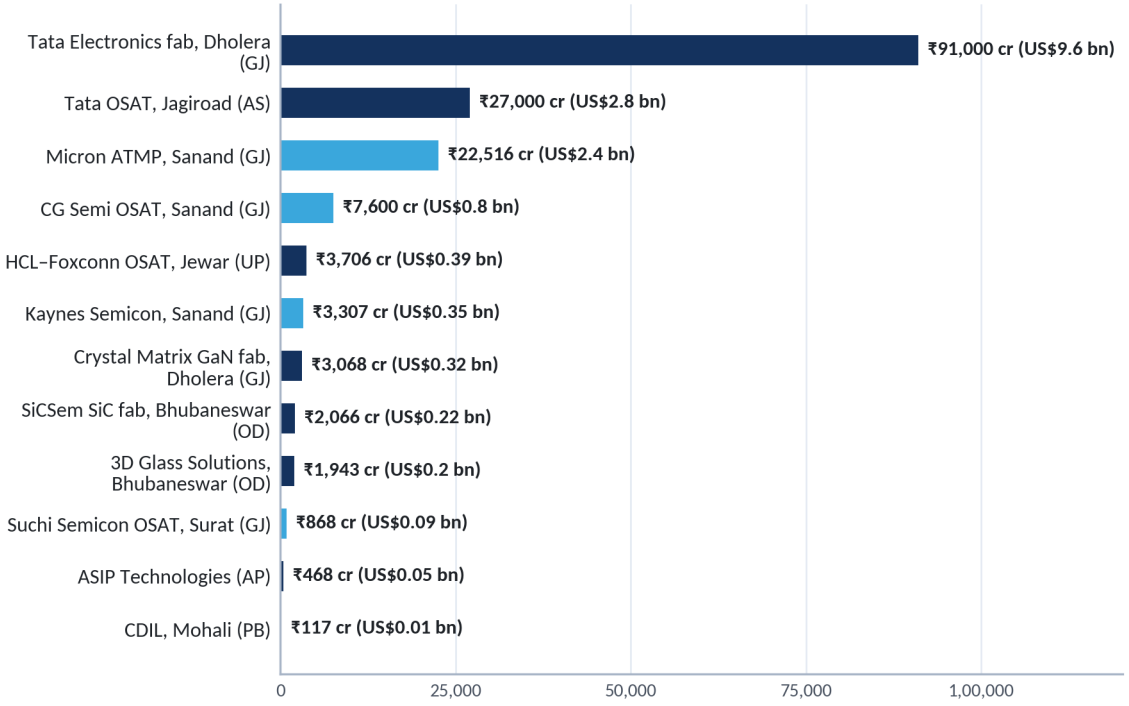
Value-chain stage	Leading players in India (September 2026)	Where India stands
Design and IP	India design centres of Qualcomm, Intel, NVIDIA, Texas Instruments, AMD and others · L&T Semiconductor Technologies · Mindgrove · InCore · MosChip · Cyient Semiconductors	~20% of global design engineers; Indian product base growing
Front-end fabrication	Tata Electronics with PSMC (Dholera; 28–110 nm, first wafer expected 2028) · SCL Mohali (government fab, legacy nodes)	First commercial fab under construction
Assembly, test and packaging	Micron, Kaynes, CG Semi (Sanand) · CDIL (Mohali) · Suchi Semicon (Surat) · Tata OSAT (Jagiroad) · HCL–Foxconn (Jewar) · 3D Glass Solutions (Odisha) · ASIP (Andhra Pradesh) · Sahasra (Bhiwadi, under SPECS)	Five units in commercial production
Compound semiconductors	SiCSem (silicon carbide, Bhubaneswar) · Crystal Matrix (GaN micro-LED, Dholera)	Two compound fabs under construction
Equipment and materials	Applied Materials · Lam Research · ASML (in-country support) · Fujifilm · Sumitomo Chemical · JSR · INOX Air Products · Enomoto (lead frames)	Suppliers arriving; first local output FY2028
Fab facility and infrastructure	Kelington (gas distribution, ultra-pure piping) · Ascendas Firstspace (363-acre vendor park, Dholera)	Supplier park forming around Dholera

Note: Companies are placed by what their Indian operations do. Research institutions and design-enablement programmes are listed in the institutions table later in this chapter. The list is not exhaustive and does not imply endorsement.
Source: ISM; Cabinet approvals; company announcements; ThePrint (Ideas for India).[3,4,18,20,31]

Approved manufacturing projects

Figure 10. Two Tata projects hold 72% of approved manufacturing capital

ISM-approved manufacturing projects by investment, ₹ crore (US$ billion), approvals June 2023 to May 2026



N = 12 approved projects; total ₹1,63,659 crore (US$17.2 bn)

Note: Saffron: in commercial production; teal: under implementation (September 2026). DSCI analysis: Tata share = (91,000 + 27,000) ÷ 1,63,659 = 72.1%. Crystal Matrix and Suchi Semicon were approved together in May 2026 for ₹3,936 crore; Suchi's cost is ₹868 crore and Crystal Matrix's ₹3,068 crore the balance.[41]

Source: Cabinet approvals 2023–2026 (PIB, PMO); ISM fact sheet.[3,4]

Table 5. Capital is concentrated in one fab; units are concentrated in packaging

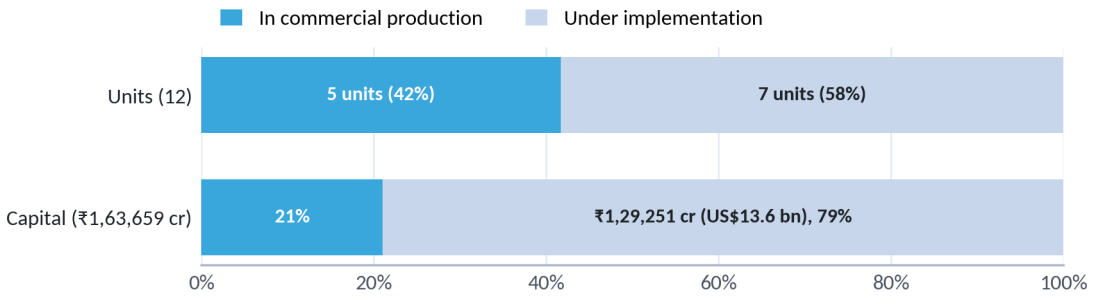
Approved manufacturing projects by segment, September 2026

Segment	Units	Approved capital	Share
Silicon fab (Tata Electronics, Dholera)	1	₹91,000 cr (US$9.6 bn)	55.6%
Assembly, test and packaging (incl. glass substrate and discretes)	9	₹67,525 cr (US$7.1 bn)	41.3%
Compound semiconductor fabs (SiCSem; Crystal Matrix)	2	₹5,134 cr (US$0.54 bn)	3.1%
Total	12	₹1,63,659 cr (US$17.2 bn)	100%

Source: DSCI analysis: aggregation of Cabinet approval values (each segment ÷ ₹1,63,659 crore); the total reconciles to the ISM figure.[3,4]

Figure 11. Count is ahead of capital: 5 of 12 units, but 21% of approved capital, are producing

Operating share of approved units and of approved capital, %, September 2026



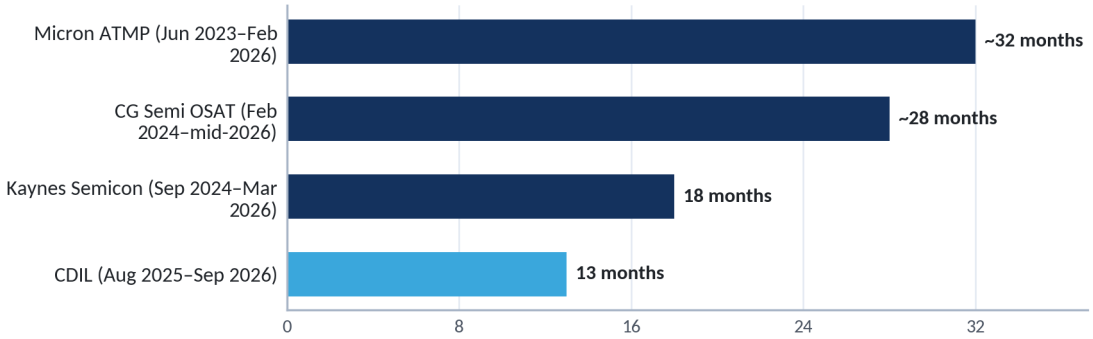
N = 12 approved units; ₹1,63,659 crore of approved capital

Note: Operating: Micron, CG Semi and Kaynes (Sanand), CDIL (Mohali), Suchi Semicon (Surat), with ₹34,408 crore (US$3.6 bn). DSCI analysis: 22,516 + 7,600 + 3,307 + 117 + 868 = ₹34,408 crore; ÷ 1,63,659 = 21.0%; 5 ÷ 12 = 42%.

Source: DSCI analysis from Cabinet approval values.[3,4]

Figure 12. Approval-to-production times are falling

Months from Cabinet approval to commercial production, 2023–2026



N = 4 producing projects with a measurable interval

Note: DSCI analysis: months between Cabinet approval date and announced start of commercial production. CG Semi measured to its mid-2026 start of production. Suchi Semicon excluded (approved May 2026, producing September 2026, about 4.5 months).

Source: Cabinet approval dates; company and government launch announcements.[1,4,13]

Profiles of the leading Indian players

Table 6. India's leading players span fabs, packaging, compound devices and design

Company	Segment and site	Scale	Status (September 2026)
Tata Electronics	Silicon fab with PSMC (Dholera, GJ); OSAT (Jagiroad, AS)	₹91,000 cr (US$9.6 bn) fab, 28–110 nm, ~50,000 wafers a month; ₹27,000 cr (US$2.8 bn) OSAT	Both under construction; first wafer expected 2028[42]
Micron Technology	Memory ATMP (Sanand, GJ)	₹22,516 cr (US$2.4 bn); 7,000+ staff in India	Producing since February 2026; exporting DRAM and NAND[13]
CG Semi	OSAT (Sanand, GJ), with Renesas and Stars	₹7,600 cr (US$0.8 bn)	Producing since mid-2026
Kaynes Semicon	OSAT (Sanand, GJ)	₹3,307 cr (US$0.35 bn)	Producing since March 2026
HCL–Foxconn	Display-driver OSAT (Jewar, UP)	₹3,706 cr (US$0.39 bn)	Under implementation

Company	Segment and site	Scale	Status (September 2026)
SiCSem	Silicon carbide fab (Bhubaneswar, OD)	₹2,066 cr (US$0.22 bn); partner Clas-SiC	Under construction[31]
3D Glass Solutions	Glass-substrate packaging (Bhubaneswar, OD)	₹1,943 cr (US$0.2 bn); output targeted by 2030	Under construction; MoU with Intel (May 2026)[19,25]
Suchi Semicon	OSAT (Surat, GJ)	₹868 cr (US$0.09 bn)	Producing since September 2026[1]
CDIL	Power discretes (Mohali, PB)	₹117 cr (US$0.01 bn)	Producing since September 2026[1]
Sahasra Semiconductors	ATMP (Bhiwadi, RJ)	Approved under SPECS	Opened May 2026[31]
L&T Semiconductor Technologies	Fabless product company	40 products, incl. a 1,200 V SiC MOSFET platform	India-designed motor controller taped out (2026)[20]
SCL Mohali	Government-owned fab (PB)	Legacy nodes	Operating

Note: Micron's project was announced as US$2.75 bn at the 2023 exchange rate; the approved rupee value is shown, converted at ₹95.

Source: Cabinet approvals; ISM; company statements; Business Standard; The Tribune; ThePrint (Ideas for India).[3,4,13,19,20,25,31]

Table 7. Institutions and programmes anchor every stage of the value chain

Research institutions, design-enablement programmes and talent anchors

Institution or programme	Stage	Role and scale (latest)
ChipIN Centre, C-DAC Bengaluru	Design and IP; incubation	Shared EDA tools, compute and IP libraries; 320 academic institutions and 105 start-ups and MSMEs supported (2026)
Chips to Start-up (C2S), MeitY	Design; talent	Chip design to tape-out; 211 chips taped out by 75 institutions by April 2026, incl. 12 nm designs
Design Linked Incentive (DLI)	Design; start-ups	24 design projects approved; 105 start-ups and MSMEs given EDA access (to June 2026)
C-DAC (VEGA) and IIT Madras (SHAKTI)	Design and IP	Indigenous RISC-V processor families
SCL Mohali	Prototyping	Fabricates and packages academic and start-up designs through shared wafer runs
IISc CeNSE; IIT Bombay SemiX; IIT Delhi NRF	Process R&D	Nanofabrication, device and semiconductor technology research
NIELIT; Gati Shakti Vishwavidyalaya	Talent	Centre of Excellence with Infineon; MoU with Tata Electronics on talent and supply chains
IIT Hyderabad, Guwahati, Bhubaneswar	Talent near clusters	Regional anchors near the Hyderabad design cluster, Jagiroad and Odisha's projects

Source: PIB; MeitY DLI portal; DD India; inkl; Infineon; Tata Electronics; DSCI ecosystem mapping.[15,18,44,48,49,50,51]

05

Global players and the value chain

Leadership is concentrated and fast-moving. The fastest progress for India may come where scale subsidies matter less than talent, cost and speed.

₹11,94,150 crore
NVIDIA's 2025 chip revenue (US$125.7 bn), the industry's largest[28]

72.5%
TSMC's share of foundry revenue in Q2 2026[29]

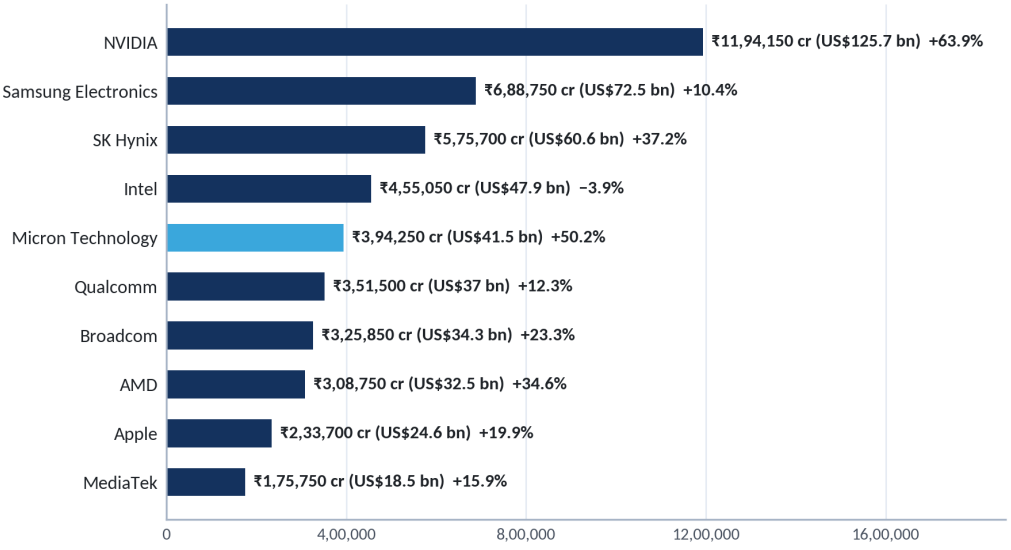
69%
of sub-10 nm logic capacity was in Taiwan in 2022[30]

The world's largest chip companies

Global semiconductor revenue reached ₹75,33,500 crore (US$793 bn) in 2025, up 21% on 2024, according to Gartner. NVIDIA became the first company to pass ₹9,50,000 crore (US$100 bn) in chip sales, and AI processors, high-bandwidth memory and networking chips made up nearly a third of the market. Memory makers gained most: SK Hynix grew 37% and Micron, which assembles and tests memory at Sanand, grew 50%. Intel was the only top ten company whose revenue fell.[28]

Figure 13. AI demand has reshaped the top ten, with NVIDIA far ahead

Top 10 semiconductor vendors by revenue, ₹ crore (US$ billion) and growth on 2024, calendar year 2025

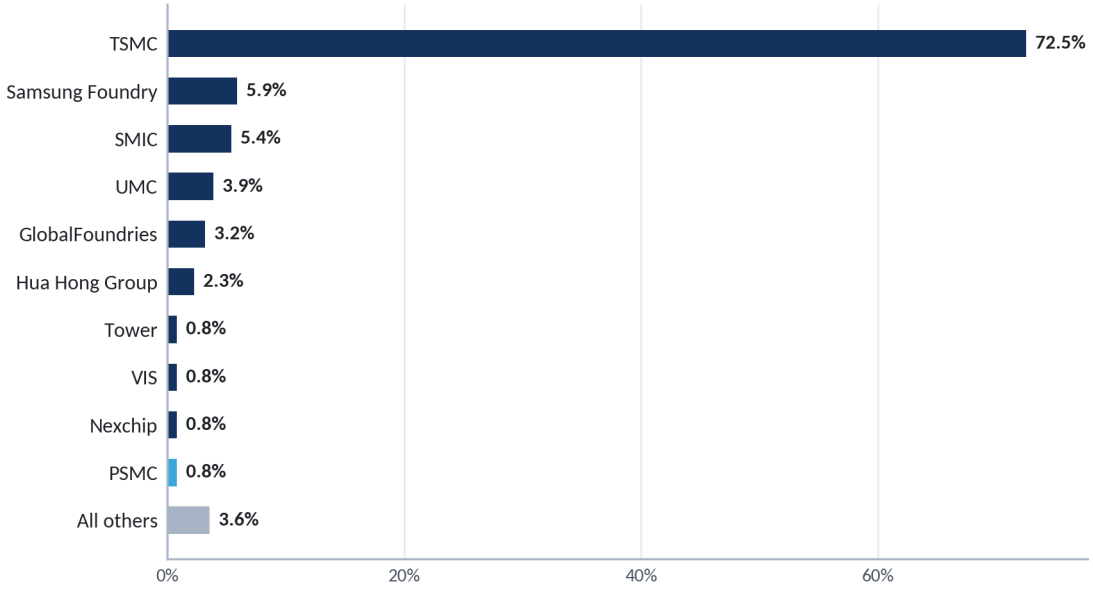


N = 10 vendors (Gartner preliminary ranking)
Note: Gartner's vendor ranking excludes pure-play foundries such as TSMC. Saffron: Micron, which manufactures in India.
Source: Gartner (January 2026), preliminary results.[28]

Manufacturing is even more concentrated. TSMC took 72.5% of global foundry revenue in Q2 2026; the next two, Samsung and SMIC, held under 6% each. PSMC, Tata Electronics' technology partner at Dholera, is among the ten largest.[29]

Figure 14. One company earns nearly three-quarters of foundry revenue

Share of global foundry revenue, %, Q2 2026



N = 10 named foundries plus all others (11 categories)

Note: Hua Hong Group and all others are DSCI analysis, derived from TrendForce revenue figures (see Appendix B). Saffron: PSMC, the Dholera technology partner.

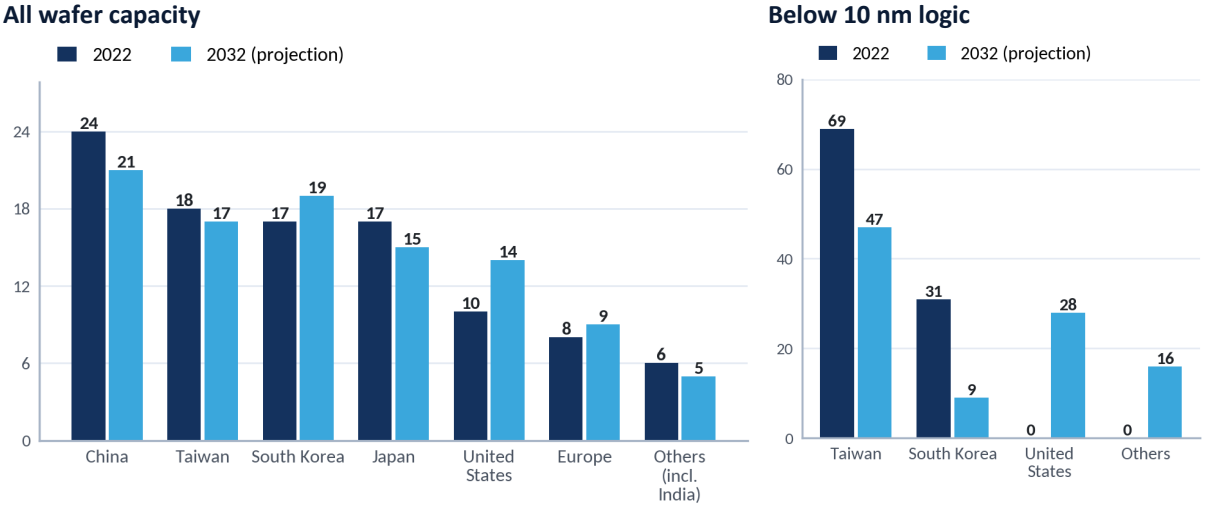
Source: TrendForce (September 2026).[29]

Where the world makes chips

In 2022 China held about 24% of global fab capacity, Taiwan 18%, and South Korea and Japan about 17% each; the United States held 10%. Taiwan and South Korea held all capacity below 10 nm. SIA and BCG project that by 2032 the United States will hold 28% of that advanced capacity. As capacity diversifies beyond East Asia, India enters the map with its first commercial fab, due to produce its first wafer in 2028.[30,42]

Figure 15. Advanced capacity is diversifying beyond Taiwan and Korea

Share of global wafer fabrication capacity by region, %, 2022 and 2032 projection



N = 7 regions (all capacity) and 4 regions (below 10 nm), 2 points in time

Note: Japan, Europe and others in 2032 are DSCI analysis, derived from regional growth rates reported by SIA and BCG (see Appendix B).

Source: SIA and BCG, Emerging Resilience in the Semiconductor Supply Chain (May 2024).[30]

Leadership across the value chain, and India's position

Table 8. Leadership across the value chain, and the capability forming in India

Dimension	Leading locations (share)	Capability forming in India	Suggested priority
Logic chip design (value, 2022)	United States 65%; Taiwan 11%; China 5%	Design-services depth; 24 DLI product-design projects	Indian product companies at scale
Memory chips (value, 2022)	South Korea 60%; United States 25%	Memory assembly and test at scale (Micron Sanand, since 2026)	Deepen test and module capability
Wafer fabrication (capacity, 2022)	China 24%; Taiwan 18%; South Korea 17%; Japan 17%; Taiwan ~70% of sub-10 nm	First commercial fab at Dholera; first wafer 2028	Yield and customers at 28 nm and above; a second front-end project
Assembly, test, packaging (capacity, 2022)	China 30%; Taiwan 28%	Five units producing; nine approved (Sept 2026)	Advanced and glass-substrate packaging
Equipment (value, 2022)	United States 47%; Japan 26%	Supply base forming around Applied Materials and Lam Research	Indian vendors on global approved-vendor lists
Materials, gases, chemicals	Japan, Taiwan, South Korea, China	First local materials output (Fujifilm) targeted FY2028	Localise inputs around every plant
Design talent (engineers, 2025)	India ~20%; United States and China	Global leader	Product ownership, not only services
Public funding	Japan ~₹6,17,500 cr (~US$65 bn); US ₹5,00,650 cr (US$52.7 bn)	₹2,03,500 cr (US$21.4 bn) across two phases (2021–26)	Specialise rather than match envelopes

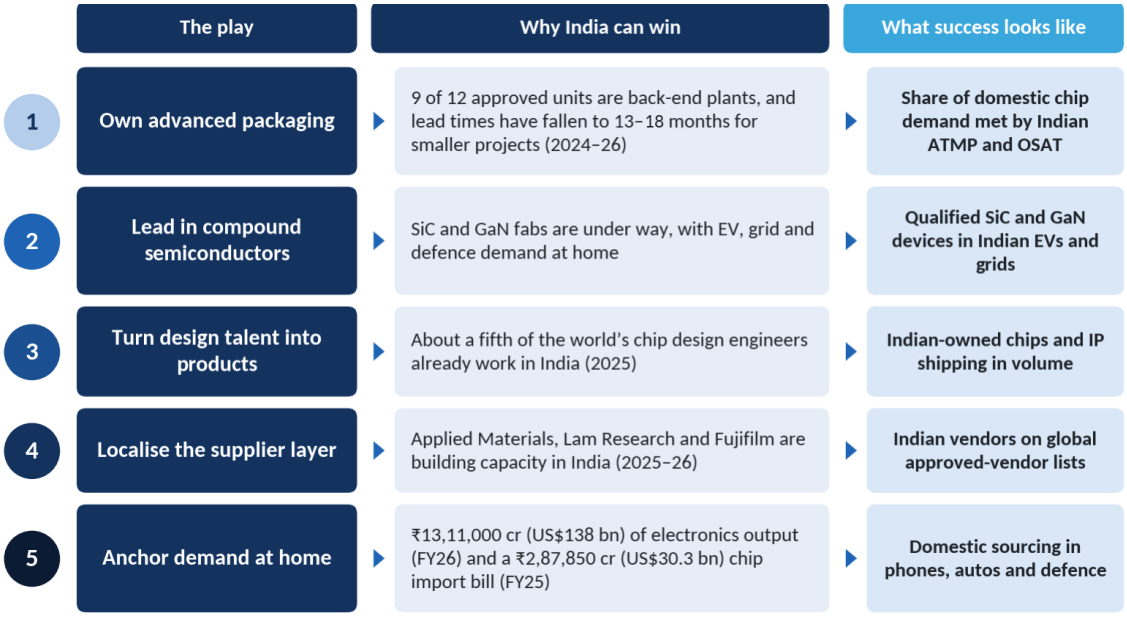
Note: Leading locations are the largest by share as reported by SIA and BCG. India is classed as a global leader where it holds about 15% or more of global value or capacity (DSCI classification). Europe, a leader in EDA, IP and equipment, is outside the comparison.

Source: SIA and BCG (2022 shares); Gartner; TrendForce; NITI Aayog; ISM; CNBC; US Senate Commerce Committee; DSCI analysis.[4,28,29,30,34,42,46,47]

Where India can lead: five strategic plays

Figure 16. Five strategic plays where India can lead

Strategic plays, the basis for India's advantage and what success would look like



Source: DSCI analysis.

06

State map: where the industry leads and grows

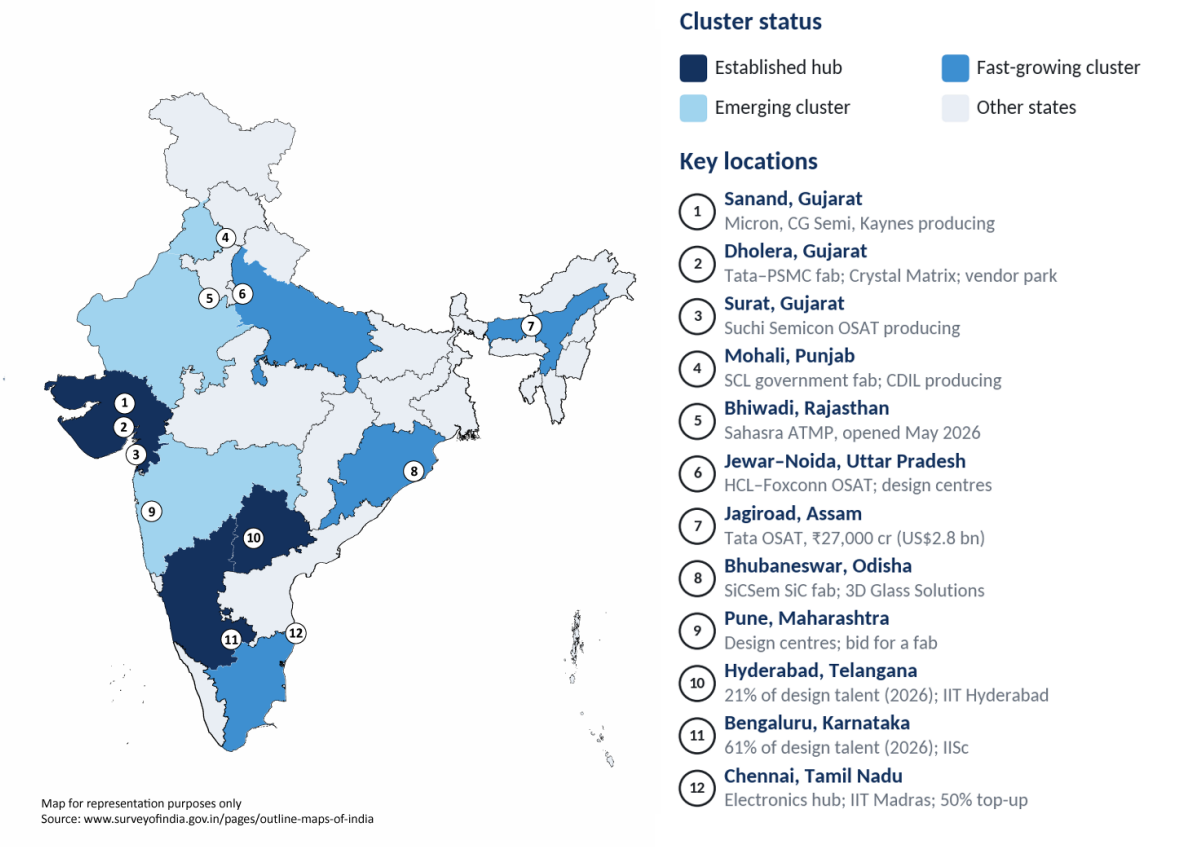
Gujarat leads manufacturing and Karnataka leads design, while the map widens east and north. Capital remains concentrated.

78.4% of approved manufacturing capital is in Gujarat (Sept 2026)[4]	**61%** of design-centre talent is in Bengaluru (2026)[33]	**70–80%** combined central and state support for a flagship project (2026)[31]

India’s semiconductor geography has two centres of gravity. Manufacturing is anchored in Gujarat, where Sanand hosts three operating plants and Dholera the first commercial fab. Design is anchored in Bengaluru and Hyderabad, which together held 82% of semiconductor design-centre talent in 2026. A second ring of states has each landed a first plant and is competing for the next.[31,33]

Figure 17. Manufacturing clusters in Gujarat and design in the south, with new clusters rising in the east and north

Semiconductor cluster status by state, with key locations, September 2026



N = 11 states classified; 12 key locations

Note: Cluster status is a DSCI classification. Established hub: commercial production at scale, or at least 15% of India's design talent. Fast-growing: an approved project above ₹1,500 crore under construction, or India's largest electronics base with a 50% top-up. Emerging: a first unit below ₹500 crore, a unit outside the ISM, or a bid without an approved plant. The external boundary follows the Survey of India; internal boundaries are indicative and the map is not to scale.

Source: ISM; Cabinet approvals; state semiconductor policies; Careernet; ThePrint (Ideas for India).[3,4,31,33]

Why some states lead and others are growing

Five forces explain the pattern: state incentives, an anchor investor, skilled talent, strong institutions, and land, power and water. Higher top-ups from states with smaller industrial bases work as catch-up bidding for the clustering advantages Gujarat already has.[31,32]

Table 9. What places each state on the map

Cluster status, approved capital, incentives and talent, September 2026

State and hub	Status	Approved ISM capital (Sept 2026)	Incentive and infrastructure	Why this status
Gujarat (Sanand, Dholera, Surat)	Established	6 units; ₹1,28,359 cr (US$13.5 bn); 78.4%; 4 producing	40% top-up; land up to 75% off for first 200 acres at Dholera; power ~₹2 a unit for 10 years	Only state with production at scale and suppliers following anchors
Karnataka (Bengaluru)	Established	None	ESDM policy: 10% capital subsidy; IISc	61% of design talent (2026)
Telangana (Hyderabad)	Established	None	IIT Hyderabad; deep IT base	21% of design talent (2026)

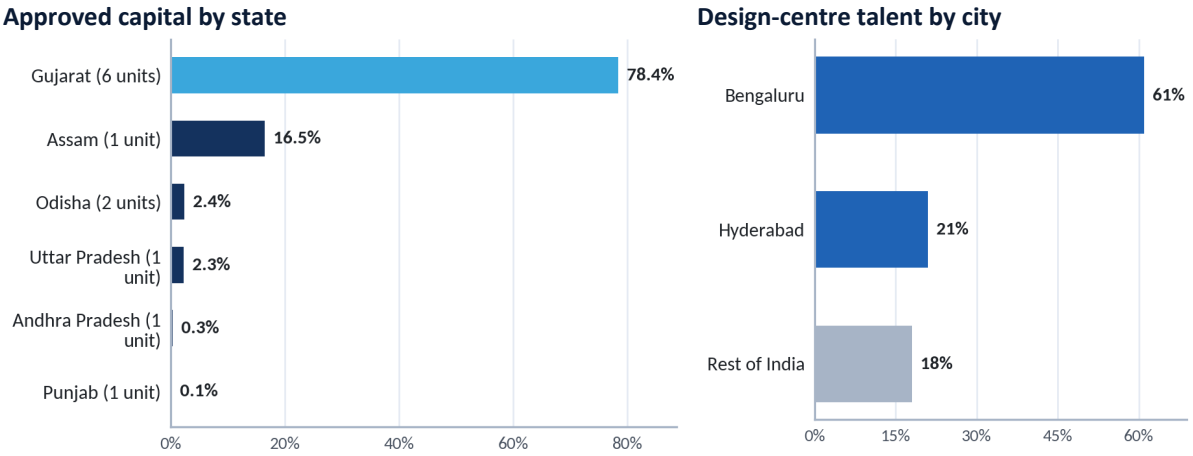
State and hub	Status	Approved ISM capital (Sept 2026)	Incentive and infrastructure	Why this status
Assam (Jagiroad)	Fast-growing	1 unit; ₹27,000 cr (US$2.8 bn); 16.5%	Water at ₹5 a cubic metre; 50% power-tariff cut for 10 years; IIT Guwahati	Second-largest approved project
Uttar Pradesh (Jewar, Noida)	Fast-growing	1 unit; ₹3,706 cr (US$0.39 bn); 2.3%	50% top-up; SGST exemptions; airport access	Large OSAT under construction
Odisha (Bhubaneswar)	Fast-growing	2 units; ₹4,009 cr (US$0.42 bn); 2.4%	50% top-up; 870 acres at Naraj; IIT Bhubaneswar	India's first SiC fab and glass-substrate packaging
Tamil Nadu (Chennai)	Fast-growing	None yet	50% top-up (2024 policy); IIT Madras	Largest electronics manufacturing base
Andhra Pradesh	Emerging	1 unit; ₹468 cr (US$0.05 bn); 0.3%	60% top-up, the highest	First unit is small
Punjab (Mohali)	Emerging	1 unit; ₹117 cr (US$0.01 bn); 0.1%; producing	SCL government fab; discrete-device skills	Small unit, although producing
Rajasthan (Bhiwadi)	Emerging	None under ISM; Sahasra under SPECS	Electricity, stamp-duty and land-conversion exemptions	Unit sits outside the ISM
Maharashtra (Pune)	Emerging	None; a proposed fab lost its technology partner	Design centres	Design base but no approved plant

Note: DSCI analysis: state share = state's approved capital ÷ ₹1,63,659 crore. Top-ups are stated as a share of the central incentive.

Source: DSCI classification; Cabinet approval values; state policies as compiled by ThePrint (Ideas for India) and CSIS; Careernet.[4,31,32,33]

Figure 18. Capital clusters in Gujarat; design talent in Bengaluru and Hyderabad

Share of ISM-approved capital by state, September 2026 (left); share of design-centre talent by city, 2026 (right), %



N = 6 states with 12 approved units (left); talent in about 180 design centres run by 79 companies, 1.1 lakh+ professionals (right)

Note: DSCI analysis (left): Gujarat 1,28,359 ÷ 1,63,659 = 78.4%; Assam 27,000 ÷ 1,63,659 = 16.5%.

Source: DSCI analysis from Cabinet approval values; Careernet, Semiconductor Design GCC Talent Demand Analysis (May 2026).[3,4,33]

07

Major commitments in the industry

Large numbers are arriving from equipment makers, investors and the government. They sit at very different levels of certainty and are best read separately rather than added together.

₹47,500 crore
Applied Materials' ten-year India programme, 2026–35 (US$5 bn)[11]

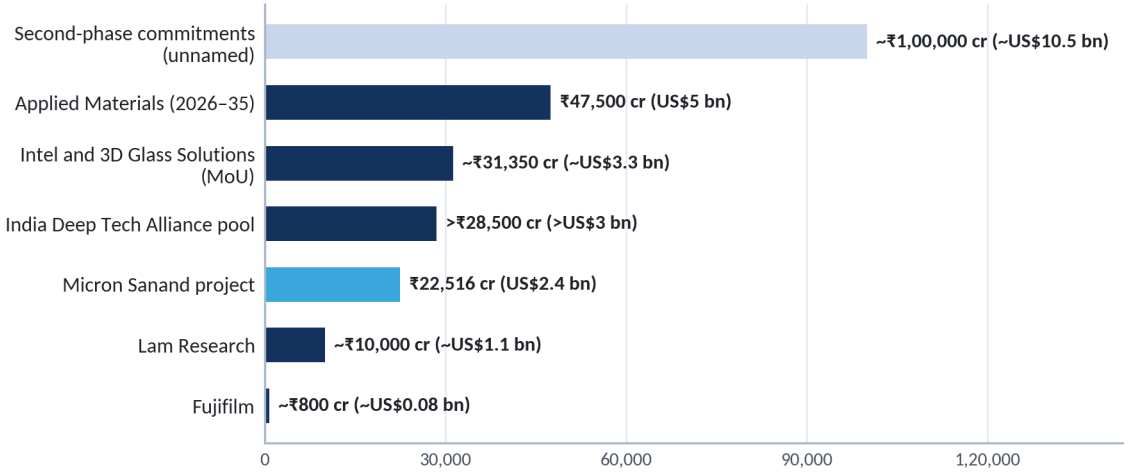
~₹1,00,000 crore
second-phase commitments disclosed, firms unnamed (Sept 2026; US$10.5 bn)[10]

56
MoUs, announcements and initiatives at SEMICON India 2026[45]

The past year (September 2025 to September 2026) brought the largest corporate commitments India's industry has seen, led by equipment and materials suppliers rather than new fabs. The largest single pledge is Applied Materials' ₹47,500 crore (US$5 bn) India Vision 2035; the largest aggregate is about ₹1,00,000 crore (US$10.5 bn) of second-phase commitments, with the firms to be named after board approvals.[10,11]

Figure 19. Equipment makers made the largest named pledges

Selected commitments to India's semiconductor industry, ₹ crore (US$ billion), announced 2023–2026



N = 7 commitments (1 aggregate, 6 named)

Note: Figures overlap and are not summed. US$ commitments converted at ₹95 (DSCI analysis: Applied Materials 5 × 9,500 = ₹47,500 crore; Intel–3DGS 3.3 × 9,500 = ₹31,350 crore). The Union Minister cited the second-phase total as US$11–12 bn at a different rate. Saffron: in production.

Source: ANI; Deccan Chronicle; Open Magazine; The Tribune; Business Standard.[10,11,12,19,22,73]

Table 10. Commitments span research, manufacturing and capital, and mostly sit in the supplier layer

Largest commitments and signals, as stated by companies or government to September 2026

Commitment	Size	Scope	Timeline and stage	What it signals
Applied Materials	₹47,500 cr (US$5 bn)	140-acre research park; 10× India supply-chain capacity; 2× R&D headcount	To 2035; company programme	Equipment ecosystem expects a lasting Indian customer base
Second-phase investors (unnamed)	~₹1,00,000 cr (US$10.5 bn)	Equipment, materials, gases, ATMP, substrates, one wafer project	2026–29; commitments received	Breadth of interest beyond fabs
Intel and 3D Glass Solutions	~₹31,350 cr (US$3.3 bn)	Glass-core substrate plant, Odisha (separate from the ISM unit); ~1,800 jobs	5–6 years; MoU (May 2026)	AI-era packaging adjacency
Micron, Sanand	₹22,516 cr (US$2.4 bn)	Scaling to hundreds of millions of units in 2027	2026–27; in production	Indian memory back-end serves global customers
Lam Research	~₹10,000 cr (US$1.1 bn)	First silicon-component and ingot-processing facility; export-oriented	Not disclosed; announced	A route up the value chain for 223 precision-component firms
India Deep Tech Alliance	>₹28,500 cr (US$3 bn)	Deep-tech venture pool, up from ₹9,500 cr (US$1 bn) at its 2025 launch	Not stated; investor pledges	Capital for product start-ups
Fujifilm	~₹800 cr (US$0.08 bn)	Greenfield materials facility in two phases	Output FY2028; announced	First local materials supply
Tata Electronics	16 MoUs	Materials, gases, chemicals, packaging, vendor park, logistics	Tied to Dholera and Jagiroad	A co-located supplier cluster
ASML	Service	In-country lithography support for the first commercial fab	Ahead of first wafer (2028)	Service capability arriving early
Customs hold-ups	Issue	Delays to tools, chemicals and gases; MeitY to raise with Finance	September 2026	Logistics becoming a binding constraint

Source: ANI; Open Magazine; Business Standard; The Tribune (ANI); ThePrint; Deccan Chronicle; Akashvani News; PR Newswire.[7,10,11,12,13,19,21,22,40,45,52,73]

Of the 56 MoUs, announcements and initiatives recorded at SEMICON India 2026, most of the significant ones sit in the supplier, service and enabling layer rather than in new plants.[45] A useful leading indicator for 2026–28 is whether these suppliers begin local production, rather than whether more plants are announced.

Anchor projects and their global partners

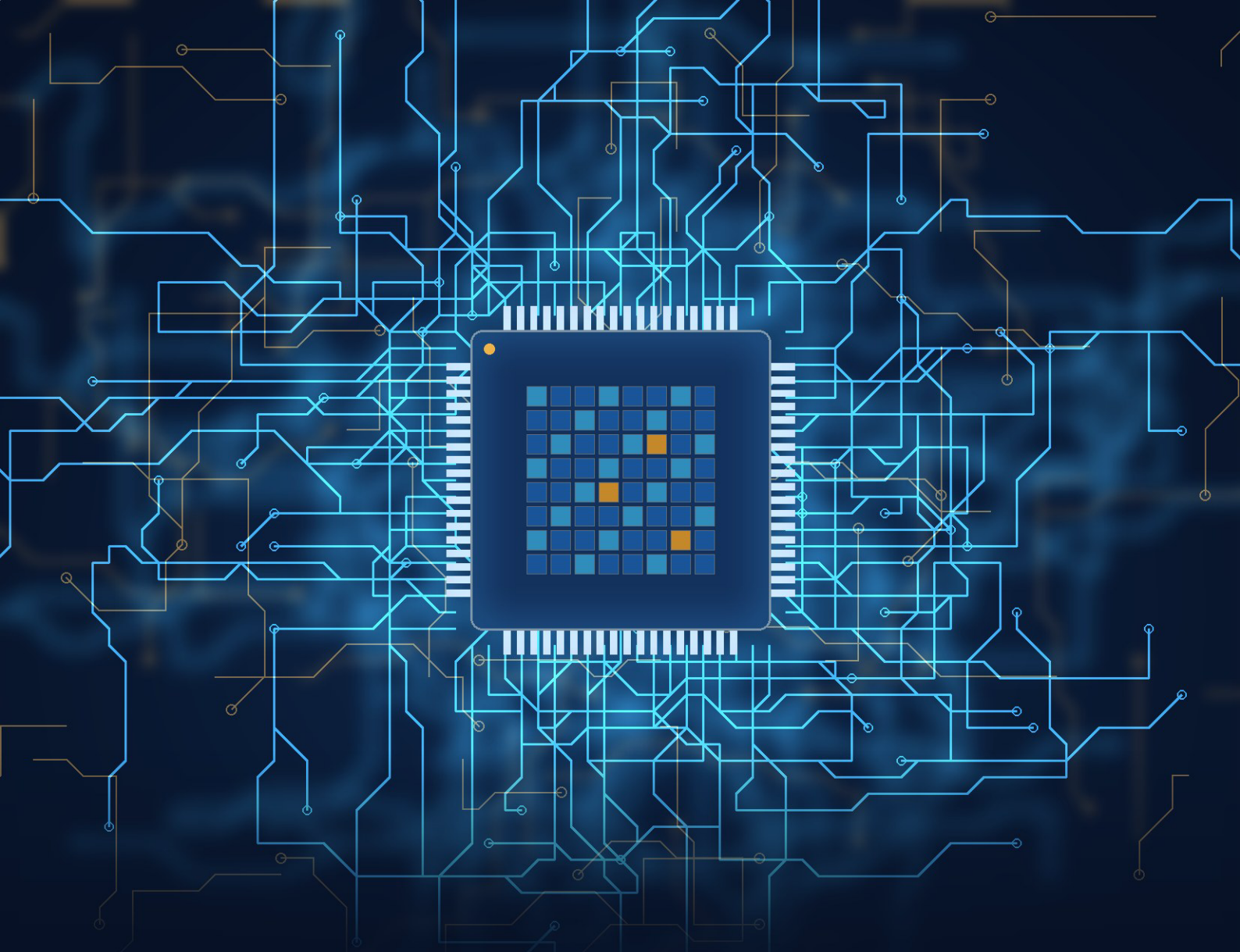
Table 11. Every anchor project rests on global partners

Key partners of approved projects; Tata Electronics shown in detail as it holds 72% of approved capital and signed 16 MoUs in September 2026

Project	Key partners and roles	Partner base
Tata Electronics fab, Dholera	PSMC (technology partner); ASML (lithography, MoU May 2026); Fujifilm, Sumitomo Chemical (materials and chemicals); INOX Air Products (high-purity gases); Kelington (gas distribution, ultra-pure piping); Sojitz with NRS (materials); Ascendas Firstspace (363-acre vendor park); Nexperia (parts of its portfolio)	Taiwan; Netherlands; Japan; India; Singapore

Project	Key partners and roles	Partner base
Tata OSAT, Jagiroad	BESI (advanced packaging); Enomoto (lead frames); Nexperia (discretes packaging)	Netherlands; Japan
Micron ATMP, Sanand	Micron's global memory network supplies the wafers; first India-made modules delivered to Dell Technologies	United States
CG Semi OSAT, Sanand	Joint venture of CG Power with Renesas Electronics and Stars Microelectronics	Japan; Thailand
HCL–Foxconn OSAT, Jewar	Joint venture for display-driver chips	Taiwan
SiCSem SiC fab, Bhubaneswar	Clas-SiC Wafer Fab as technology partner	United Kingdom
3D Glass Solutions, Bhubaneswar	MoU with Intel on glass-substrate packaging	United States

Source: YourStory; BusinessToday; Open Magazine; ASML statements; ThePrint (Ideas for India); The Tribune (ANI).[4,8,12,13,18,19,21,31]



Part three

The capabilities and the path

What India can already do, how it is building talent and capital, and its technical position against global benchmarks.

In this section

08 Talent, start-ups and deep-tech capital 35

09 Strategic assessment 37

08

Talent, start-ups and deep-tech capital

Design talent is India's established advantage. Factory-floor skills and capital for product companies are the next priorities.

70,000
design engineers trained in four years (2022–26)[9]

1 lakh
technicians targeted in the second phase (2026–29)[9]

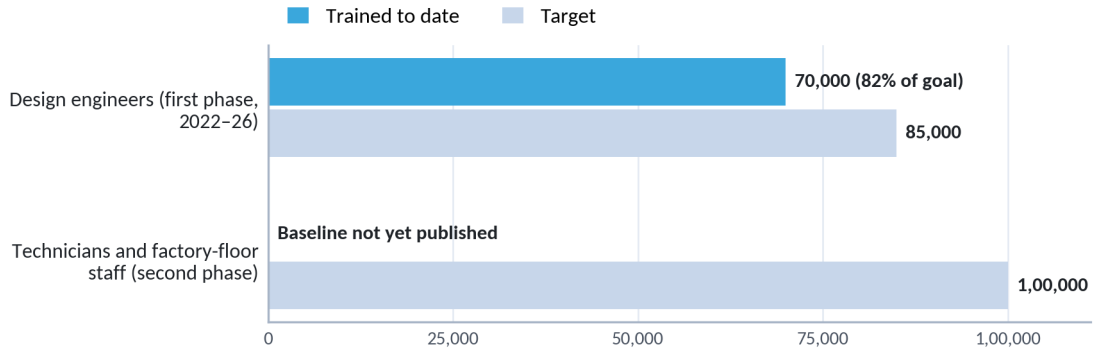
>₹28,500 crore
India Deep Tech Alliance pool, Sept 2026 (>US$3 bn), up from US$1 bn in 2025[22]

Talent: from design desks to cleanrooms

The first phase set out to train 85,000 chip design engineers over ten years; about 70,000 were trained in four (2022–26).[9] With plants now ramping, the second phase targets one lakh technicians, cleanroom operators, maintenance staff and process engineers. These skills are learned largely on production tools, so training works best where the plants are and at the pace of their ramp-up.

Figure 20. Design training is ahead of schedule; factory-floor training has no published baseline yet

Progress against national talent targets, number of people, 2022 to September 2026



N = 2 national programmes

Note: DSCI analysis: 70,000 ÷ 85,000 = 82% of a ten-year goal reached in four years. The same cohort has also been described against a goal of one lakh engineering students.

Source: Union Minister (ANI); ISM.[1,9]

Table 12. National programmes now span design, tools, factory skills and partnerships

Initiative	What it does	Scale (latest)
Chips to Start-up (C2S)	Chip-design training at academic institutions	70,000 engineers trained (2022–26) against an 85,000 goal
Access to design tools	Government-provided EDA tools and design infrastructure	320 academic institutions; 105 start-ups and MSMEs (2026)
Second-phase talent pillar	Technician, cleanroom, maintenance and process skills	Target of 1 lakh skilled personnel
Industry centres of excellence	Industry-ready skills, e.g. Infineon with NIELIT	Builds on a January 2026 agreement
India Semiconductor Academy	SEMI and India Deep Tech Alliance workforce collaboration	Announced September 2026
Indigenous RISC-V processors	SHAKTI (IIT Madras) and VEGA (C-DAC) for teaching and products	Royalty-free domestic designs

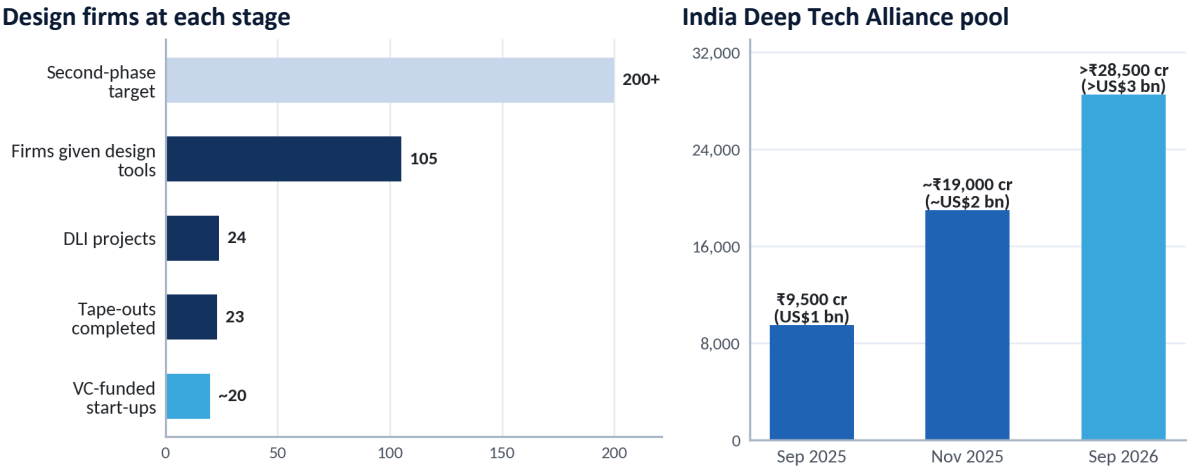
Source: MeitY; ISM; Infineon; YourStory; OpenGov Asia.[6,9,15,45]

Start-ups and design: conversion is the metric

Of the 105 firms supported with design tools in the first phase, about 20 raised venture capital, roughly ₹800 crore (US$0.08 bn) in all. If the 200-firm target converts at the same rate, India would have around 38 venture-backed design companies (DSCI analysis below). Closing the gap between tape-out and volume product may matter more than the headline count.

Figure 21. Design firms are multiplying, and venture capital is following the strongest

Design firms at each stage, number (left); India Deep Tech Alliance commitments, ₹ crore (US$ billion) (right); 2022 to September 2026



N = 105 firms supported in the first phase (left); 3 reported pool sizes (right)

Note: DSCI analysis: conversion = 20 ÷ 105 = 19%; 200 × 19% ≈ 38 venture-backed firms; average raise ≈ ₹800 crore ÷ 20 = ₹40 crore (about US$4 million) each.

Source: Union Minister; ISM fact sheet (June 2026); Reuters (November 2025); Celesta Capital (September 2026).[9,22,26]

Capital is improving but the base is small. The India Deep Tech Alliance has grown from ₹9,500 crore (US$1 bn) at its 2025 launch to more than ₹28,500 crore (US$3 bn) in September 2026, with Qualcomm Ventures and Lam Research among participants.[22,26] Indian deep-tech start-ups raised about ₹15,200 crore (US$1.6 bn) in 2024, roughly a fifth of the ₹70,300 crore (US$7.4 bn) raised by Indian tech start-ups that year.[72]

09

Strategic assessment

Execution is under way; the evidence points next to scale, supply and skills.

₹1,29,251 crore
of approved capital under construction, Sept 2026 (US$13.6 bn)[4]

2028
first wafer expected from the Dholera fab[42]

6
technology areas benchmarked against global leaders (2026)

Strengths, priorities, opportunities and external factors

Figure 22. India's strengths are real and measurable, and the build-out is under way
Strengths, build-out priorities, opportunities and external factors, with a key number for each

Strengths		Build-out priorities	
5 of 12	approved units in commercial production (Sept 2026)	₹1,29,251 cr	of approved capital (US$13.6 bn) under construction, Sept 2026
~20%	of the world's chip design engineers are in India (2025)	₹2,87,850 cr	annual chip imports in FY25 (US$30.3 bn): demand ready for domestic supply
2.2×	project investment per rupee of first-phase outlay (2021–26)	5 states	beyond Gujarat already host approved plants (Sept 2026)
₹13,11,000 cr	electronics output in FY26 (US$138 bn) anchors chip demand	2028	first wafer expected from the Dholera fab

Opportunities		External factors	
₹22,80,000 cr	annual import bill by FY35 on trend (US$240 bn): a market to substitute	~₹6,17,500 cr	Japan's funding envelope (~US$65 bn), about 3× India's
₹1,57,70,000 cr	global chip sales in 2026 (US$1,660 bn), WSTS August 2026 update	~250%	memory growth in 2026 invites a later price correction
SiC, GaN	power devices for EVs, grids, displays and defence	72.5%	of foundry revenue with one firm (Q2 2026); fierce talent competition
Glass, chiplets	AI-era packaging where no incumbent is locked in	Tool access	export controls could slow lithography and etch supply

Note: DSCI analysis: under construction = ₹1,63,659 crore – ₹34,408 crore = ₹1,29,251 crore; Japan vs India = US$65 bn ÷ US$21.4 bn ≈ 3.0. Values in ₹ crore with US$ bn in the description.
Source: As cited in Chapters 02 to 09.[2,4,23,28,29,31,34,38]

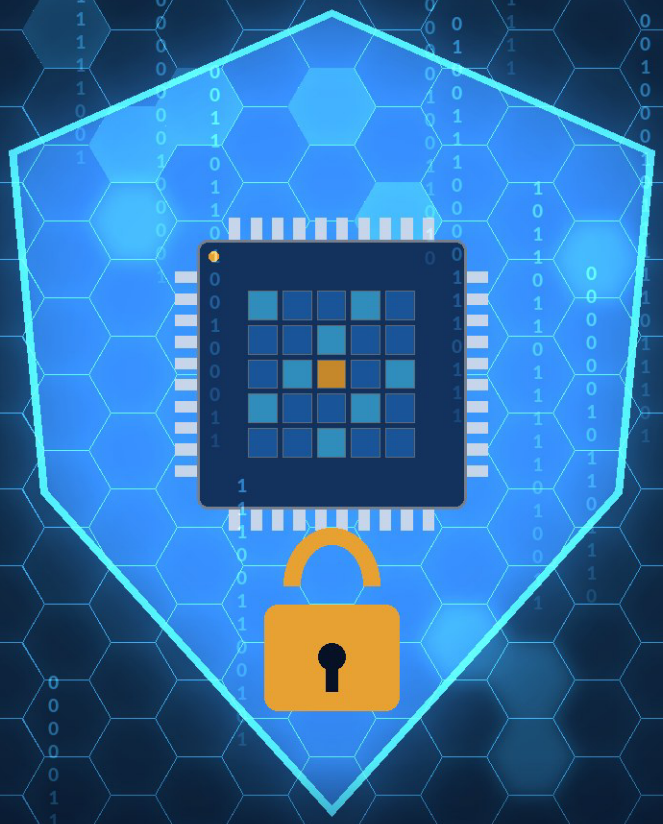
Technical position in the context of global benchmarks

Figure 23. Where India stands technically, and the focus for the coming months

Technology area, India's position (September 2026), the global benchmark and the technical focus for the next 6–12 months

Technology area	Where India stands	Global benchmark	Focus, next 6–12 months
Logic fabrication	300 mm fab at Dholera covering 28–110 nm; ramp starts on a proven 90 nm process; first wafer expected 2028	Leading edge at 2–3 nm; mature nodes (28 nm and above) serve autos, power, IoT and displays	Tool installation and qualification; process transfer from PSMC; yield learning on 90 nm
Memory back-end	Micron Sanand assembles and tests DRAM and NAND; tens of millions of units in 2026	High-bandwidth memory stacking for AI accelerators	Ramp to hundreds of millions of units in 2027; deeper test and module capability
Advanced packaging	Nine packaging units approved, five producing (Sept 2026); glass-substrate packaging under way in Odisha	2.5D and 3D integration, chiplets and glass substrates for AI-era chips	Qualify flip-chip and advanced lines with global customers; glass-substrate pilot output
Compound semiconductors	Silicon-carbide fab (SiCSem) and GaN micro-LED fab (Crystal Matrix) under way	SiC for EVs and power grids; GaN for fast charging, RF and displays	Process and device qualification with Indian EV, grid and defence customers
Design and IP	About 20% of global design engineers; 211 chips taped out by 75 institutions (to April 2026), incl. 12 nm designs	Product ownership at advanced nodes; RISC-V gaining ground in embedded and AI chips	Convert tape-outs into production silicon; scale DLI-backed products; build IP portfolios
Equipment and materials	Applied Materials, Lam Research, Fujifilm, JSR and gas suppliers localising around Dholera	Japan, the United States and Europe lead tools and materials supply	Qualify locally made chemicals, gases and components with the first fabs; supplier-park readiness

Source: DSCI analysis based on ISM, PIB, company and ministerial statements.[4,8,13,42,51]



Part four

Trust, security and self-reliance

Why chips have become a question of trust as well as capacity, and what that implies for supply, policy, industry capability and AI compute.

In this section

10	Why chips are now a question of trust	40
11	Self-reliance in chip supply	41
12	Semicon 2.0 through a cybersecurity lens	44
13	Cybersecurity capability in the ecosystem	47
14	Securing the AI factory	48
15	Mapping the ecosystem: DSCI's semiconductor radar	51

10

Why chips are now a question of trust

The earlier chapters track capacity. The trustworthiness of chips, and not only their availability, is becoming central to India's critical systems.

90–95%
of India's chip demand met by imports (FY25)[34]

72.5%
of global foundry revenue earned by a single company (Q2 2026)[29]

6
stages of a chip's life at which trust must hold

Every sector India treats as critical information infrastructure now runs on semiconductors. A payment switch, a 5G base station, a smart meter, a naval radar and a GPU cluster share one dependency: chips whose behaviour is fixed in silicon and firmware long before they are installed. Most security effort targets networks, software and people; the hardware layer is largely taken on trust. Each hand-off between design, fabrication, packaging and remote updates is a point of risk.

Table 13. Trust must hold at every stage of a chip's life

Stage	Typically controlled by	What can go wrong	How it can be verified
Design and IP	Chip designers, IP licensors and EDA vendors, often across several countries	Flawed or malicious logic in licensed IP; theft of the design	Design verification; IP provenance; security review of third-party IP
Fabrication	Foundries concentrated in a few locations	Alteration at mask or process stage; over-production of unauthorised parts	Trusted-foundry arrangements; post-fabrication testing
Assembly, test, packaging	OSAT providers	Counterfeit or remarked parts; falsified tests; tampering in multi-die packages	Electrical and X-ray inspection; test-data integrity; secure die-to-die links
Firmware and updates	Chip vendors and device makers, often remotely	Tampered firmware or a compromised update channel	Secure boot from a hardware root of trust; signed updates; attestation
Distribution	Distributors, brokers and resellers	Grey-market, recycled or cloned parts	Authorised channels; serialisation and provenance records
In service	Operators of critical systems	Side-channel leakage; fault injection; unsupported parts left in place	Monitoring; lifecycle management; planned substitution

Note: Illustrative; does not describe any specific product or supplier.
Source: DSCI analysis.

Why the question is pressing now

The plants are being built now	Policy has made the link explicit	Supply is concentrated and contested
Five units producing and seven under construction (Sept 2026). Security designed in while fabs and supplier parks are planned costs far less than retrofitting, and some hardware controls cannot be added later.	The second phase lists national security through resilient supply networks among its aims. Budget 2026–27 commits it to full-stack Indian semiconductor IP.[53,54]	90–95% of demand imported (FY25); one firm earns 72.5% of foundry revenue (Q2 2026). An export control, conflict or cyber incident could reach critical systems within months.[29,34]

11

Self-reliance in chip supply

Assured supply rather than isolation: building self-reliance where it matters most.

₹2,87,850 crore
semiconductor import bill in FY25 (US$30.3 bn)[34]

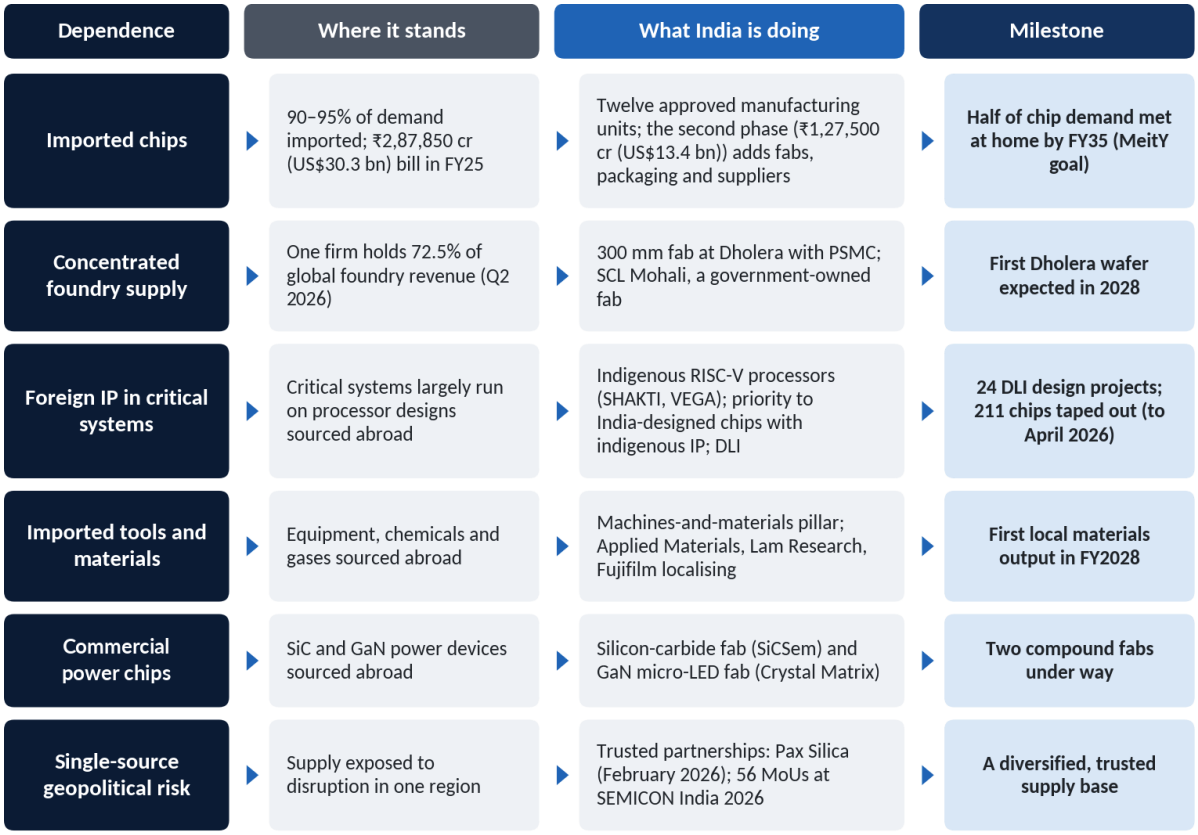
5,760
of about 7,000 chips on each RISAT satellite made in India (2026)[68]

5
further steps proposed for a supply shock

A conflict, blockade or export-control shock in a producing region could reach India's critical systems through shortages of new chips and of spares. The effect would be uneven: consumer electronics can wait, but a telecom operator replacing baseband cards, a utility maintaining protection relays or a defence programme awaiting radar modules often cannot. What matters is which specific parts critical systems depend on, how many sources exist and how long a switch would take. The aim, in our reading, is that India should not be critically dependent on any single foreign source for chips its essential services cannot do without.[53,54]

Figure 24. India is answering each form of chip dependence with domestic capacity or trusted partnership

Where India's chip dependence lies, what India is doing about it, and the next milestone



Note: The FY35 goal of meeting half of chip demand at home is MeitY's, as reported with the NITI Aayog study[34]; the 2028 date for the first Dholera wafer was given in September 2026. Descriptions of dependence are a DSCI assessment.

Source: NITI Aayog; TrendForce; MeitY; ISM; PIB; Akashvani News; company announcements; DSCI analysis.[4,29,34,42,45,49,51]

If supply is cut: India's resilience levers

DRDO's leadership has warned that foreign embargoes could halt key programmes; the LSTAR radar and the Netra airborne system were both delayed when components were denied.[68] India's response combines levers already in place, capacity being built and inputs still to be brought home.

Table 14. India already makes its most sensitive chips at home, and is building the rest

Lever	What India has	Status (2026)
Trusted defence fab	DRDO's GAETEC, Hyderabad (est. 1996), produces GaN-on-SiC MMICs for radar and electronic warfare; DRDO's SSPL grows 4-inch SiC wafers	In place: limited production
Space-grade chips	5,760 of 7,000+ chips on each RISAT satellite made in India; 6,000+ of 9,000 MMICs in the SBS-3 radar payload produced at GAETEC	In place
Government-owned fab	SCL Mohali fabricates and packages chips on legacy nodes, including Indian designs	In place
Domestic assembly and test	Five commercial packaging units in production	In place

Lever	What India has	Status (2026)
Trusted-partner agreements	India–US semiconductor MoU (March 2023); India–Japan supply-chain partnership (July 2023, five years); Pax Silica (February 2026)	In force
Commercial and compound fabs	Dholera 300 mm fab (first wafer 2028); SiC and GaN micro-LED fabs	Being built
Local materials and suppliers	Fujifilm materials plant (FY2028); Applied Materials, Lam Research and gas suppliers localising	Being built
Inputs still imported	Ultra-pure precursor gases and GaN growth reactors; DRDO tasking academia to indigenise them	Next priority

Source: The Week; Business Standard; ISM; PIB; Akashvani News; Outlook Business (PTI); MeitY (Digital India); Business Today.[4,42,48,56,68,69,70,71,78]

Table 15. Five further steps could prepare India for a supply shock

Proposals for discussion, not existing policy

Proposed step	What it would do in a supply shock
Strategic buffer stocks	Reserves of critical chips and spares for defence, power, telecom and finance, sized to the time needed to qualify an alternative supplier
Priority allocation	A pre-agreed mechanism to direct domestic fab and packaging output to critical users first
Trusted-foundry certification	Fabs, packaging lines and design houses supplying critical infrastructure certified to work under controlled, verifiable conditions, building on the GAETEC model
Dual sourcing across trusted partners	At least two qualified suppliers in different partner countries for chips India cannot yet make
Bringing the inputs home	Localising precursor gases, growth reactors and specialty materials

Source: DSCI analysis.

12

Semicon 2.0 through a cybersecurity lens

The second phase builds security through sovereignty; security by design could be the next step.

630 GB
of data leaked after a 2026 attack on an Indian electronics manufacturer[59]

₹665 crore
ransom demanded after a 2023 breach at a foundry's hardware supplier (US$0.07 bn)[58]

2018
year malware halted fab tools at the world's largest foundry[57]

A fab disrupted by a cyber incident is, for its customers, a supply shock; a component that arrives on schedule but cannot be verified may be of limited use in a critical system. The second phase sets the terms on which the next generation of plants, suppliers and design firms will be supported, so it is the natural place to look for how India intends to address both.

Table 16. The second phase builds security through sovereignty and supply resilience
Security-relevant provisions, as announced July–September 2026

Provision	What it says	Security relevance
Programme objective	Strengthen national security through resilient supply networks; secure strategic technological sovereignty	Makes security an explicit aim
Design pillar and indigenous IP	Full-stack Indian semiconductor IP; priority to India-designed chipsets	Reduces foreign IP inside critical systems; designs can be verified at home
Supply chains	Fortify both domestic and global supply chains	Continuity of supply in a crisis
Pax Silica	Cooperation on secure, resilient supply chains for chips, critical inputs and AI infrastructure	Trusted sourcing for inputs India does not make
R&D and talent pillars	Industry-led research; one lakh skilled personnel	Base for secure fab operations and hardware-security research

Source: Framework as summarised by IMPRI; Budget 2026–27 as summarised by PIB; The Tribune (ANI); MeitY (Digital India).[8,53,54,55,56]

Public descriptions of the schemes do not yet set explicit hardware-security or cybersecurity requirements for the fabs, packaging units and design firms they fund. That may be the next opportunity, and reported incidents suggest why.

Table 17. Attacks have reached fab tools, suppliers and customers' intellectual property

Year	What happened	What it shows
2018	A WannaCry variant infected fab tools and automated material handling at TSMC; the tools ran unpatched Windows 7	Factory operational technology can halt production
2023	A ransomware group breached Kinmax, an IT hardware supplier to TSMC, and demanded a ransom of ₹665 cr (US$0.07 bn)	Supplier networks are an entry point
2026	About 630 GB (200,000+ files) stolen from a major Indian electronics and semiconductor manufacturer, including clients' engineering specifications; no operational impact reported	One breach can expose many customers' IP

Source: TSMC Form 6-K (2018); Security Affairs (2023); Recorded Future News and TechCrunch (June 2026).[57,58,59]

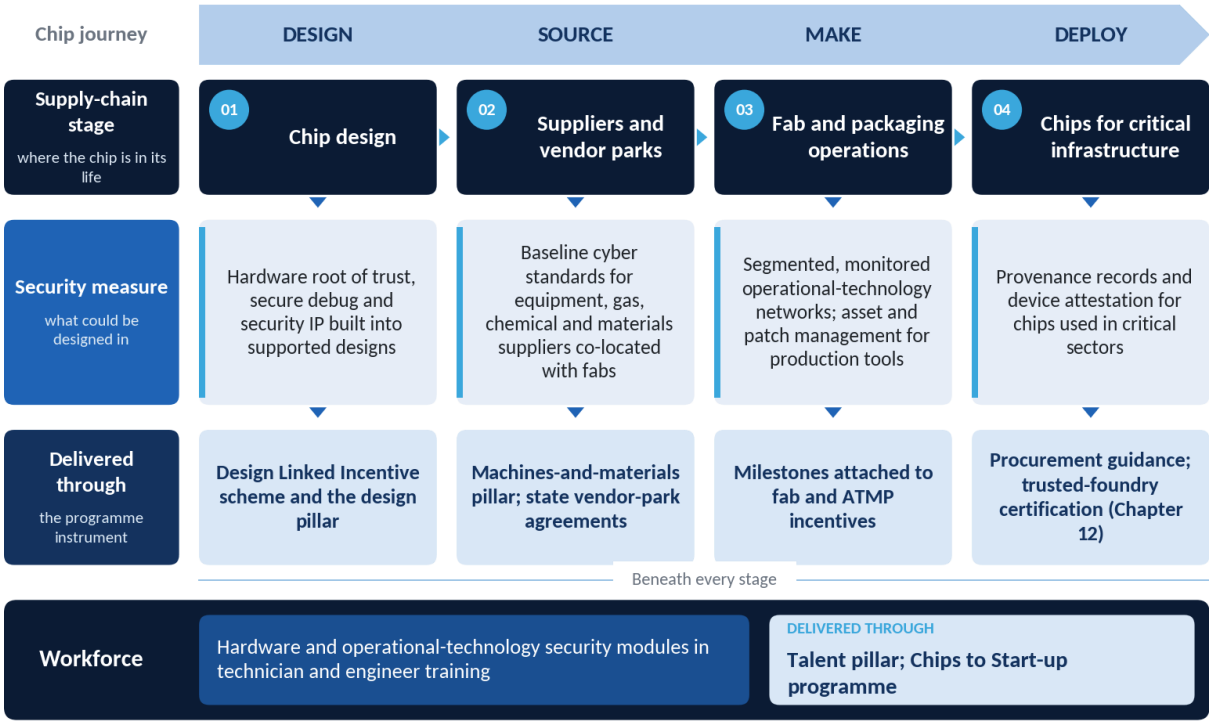
Why the sector's security merits particular attention

Hardware cannot be patched	Long-lived factory OT	One breach exposes many
A flaw in silicon or low-level firmware stays for the device's life, often a decade or more.	Fab tools stay in service for years; one unpatched system stopped production in 2018.	Chipmakers hold customers' designs, so one intrusion becomes a supply-chain IP loss.
Concentration magnifies impact	**AI raises the stakes**	**India's advantage is timing**
When a few plants serve the world, one incident ripples across industries.	An attack on shared control systems can idle thousands of processors at once.	Plants, clusters and AI data centres being built now can adopt defences from day one.

Where security could be designed in

Figure 25. Security could travel through the instruments the programme already uses

Suggested security measures at each stage of the chip supply chain, and the instrument through which each could be introduced



Note: Suggestions for discussion; they do not describe existing policy. Workforce measures apply across every stage.
Source: DSCI analysis.

13

Cybersecurity capability in the ecosystem

What security capability is already present across the stack, and where it may need to deepen as plants come on stream.

542
organisations mapped in India's semiconductor ecosystem (Sept 2026)[44]

6
capability areas that may need to deepen as manufacturing scales

4
layers of the stack where security capability is already present

Security in semiconductors is a property built into silicon, design tools, workloads and operations. Engineering teams in India already work on confidential computing, embedded security IP and hardware roots of trust for chip and chiplet designs, and trusted execution environments for AI in the cloud.[60,61,62,63,64] Two features stand out: the capability is largely held by global firms with large Indian teams, so the know-how is exercised in India even where the IP is owned elsewhere; and it sits towards the top of the stack, rather than in the manufacturing layers India is now building for the first time.

Table 18. Six capability areas may need to deepen as manufacturing scales

Capability area	What it protects	Suggested direction
Hardware security verification	Detects flawed or malicious logic before a design goes to fabrication	Build through DLI-supported firms and national design centres
OT security for fabs and OSATs	Production tools and automated handling systems	Develop specialised practice alongside plant ramp-up, not afterwards
Supply-chain provenance	Traces parts to source; detects counterfeits	Pilot for chips used in critical sectors
Roots of trust and secure firmware	Device identity; only trusted updates run	Encourage adoption in Indian designs, including RISC-V cores
Confidential computing	Data and models while being processed	Extend from cloud platforms to AI infrastructure deployed in India
Post-quantum cryptography in hardware	Long-lived devices against future cryptographic attacks	Track readiness now for decade-long deployments

Source: DSCI ecosystem mapping and analysis.[44]

Bringing industry together: the semiconductor security cohort

Capability grows fastest when companies share practice. DSCI runs a semiconductor security cohort of global companies that design or manufacture chips, or supply the manufacturing chain, in India. It offers a forum to compare approaches to OT and supplier security, discuss threats relevant to fabs, and connect this capability with the plants coming on stream.

14

Securing the AI factory

AI data centres concentrate the most valuable chips in the densest configurations, and call for a different security model.

4
things to protect at once in an AI factory

7
frontier areas of AI-compute security tracked

1,00,000
GPUs in the illustrative AI factory used to size stranded-compute risk

In an AI data centre, chips are gathered by the thousand into one system: accelerators, high-bandwidth memory, data processing units and interconnects, managed by shared control software and fed by megawatt-scale power and cooling. The unit of risk becomes the cluster, and the most valuable assets are models rather than databases.

Table 19. AI data centres need a different security model

Dimension	Conventional data centre	AI data centre (AI factory)
Unit of risk	A server or an application	A cluster of thousands of GPUs working as one machine
Most valuable assets	Databases and applications	Model weights, training data, prompts, KV cache and checkpoints
Trust boundary	Host operating system and network perimeter	CPU, GPU, HBM and interconnect, each needing attestation
Network traffic	Mostly north–south, filtered at the perimeter	Mostly east–west RDMA and NVLink traffic, enforced by DPUs
Control plane	Hypervisors and VM management	Schedulers, fabric managers, BMCs and telemetry across the cluster
Impact of an outage	One server or service unavailable	Stranded compute: an entire cluster idle at once

Dimension	Conventional data centre	AI data centre (AI factory)
Physical systems	Standard power and air cooling	Megawatt racks, liquid cooling and 800 VDC power

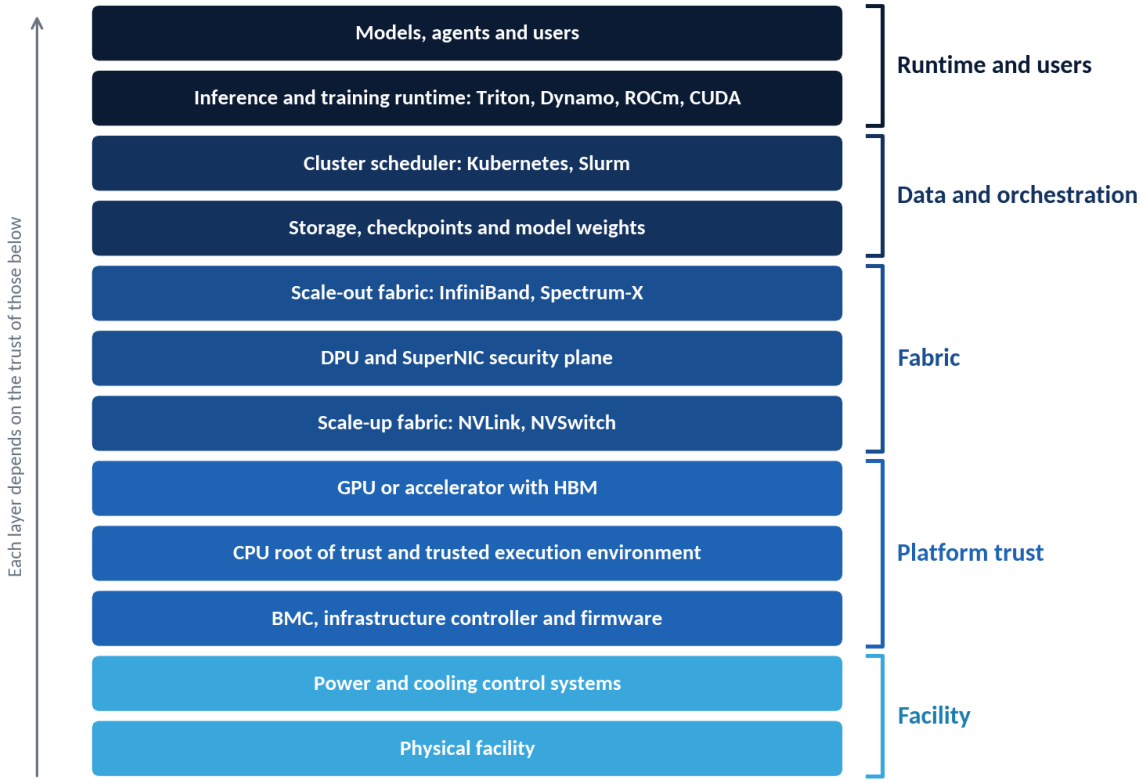
Source: DSCI analysis.

Security runs from the building to the model

Security in an AI factory runs through a stack of interdependent layers, from the building's power and cooling to the models and agents at the top; a weakness at any layer can compromise those above it.

Figure 26. Security in an AI factory runs from the building to the model

Layers of an AI data centre, grouped by security domain

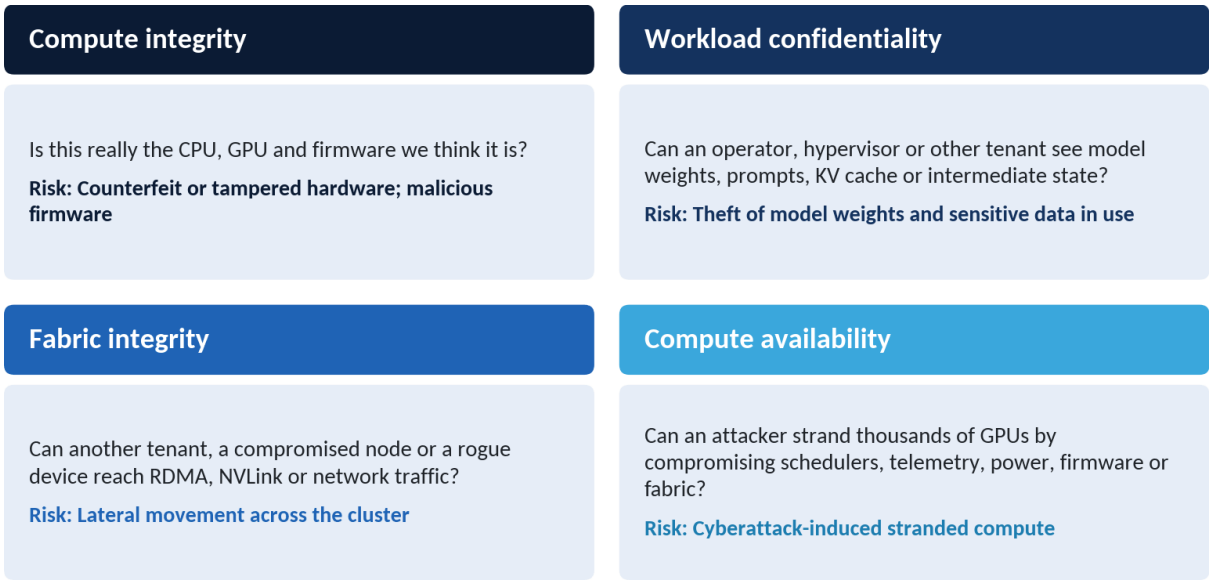


Note: Product names are examples of common AI-infrastructure components.
Source: DSCI analysis.

Four things now need protection at once: compute integrity, workload confidentiality, fabric integrity and compute availability.

Figure 27. Four things need protection at once

Security objectives in an AI factory, the question each answers, and the risk it addresses



Source: DSCI analysis.

Availability deserves particular attention. For a conventional server, a denial-of-service attack affects one machine; for an illustrative AI factory with 100,000 GPUs, compromise of the control plane, fabric manager or scheduler can idle compute worth tens of thousands of crores of rupees at once (DSCI analysis: 1,00,000 GPUs × an assumed US$30,000–40,000 each ≈ ₹28,500–38,000 crore). We propose that cyberattack-induced **stranded compute** be treated as a formal risk category. Industry is responding at the infrastructure level: NVIDIA's BlueField DPUs, for example, enforce hardware isolation between tenants and accelerate encryption, firewalls and micro-segmentation, and BlueField-4 adds secure boot from a hardware root of trust and attestation.[65,66,67]

Table 20. Seven frontier areas define AI-compute security

As tracked in the Trust and Security view of the Supercomputing Radar, alongside its memory, networking, power, cooling and packaging frontiers

Frontier area	What it protects	Where it applies
Confidential AI	Data and models while in use	Encryption and attestation across CPU, GPU, HBM and interconnect
AI-fabric zero trust	Traffic between nodes	DPU-enforced segmentation of RDMA, NVLink-adjacent and scale-out traffic
Compute identity	Authenticity of hardware	Cryptographic identity of CPUs, GPUs, DPUs, firmware and racks
Model-weight protection	Model weights	At rest, in memory, during checkpointing and between nodes
AI control-plane security	Orchestration of the cluster	BMCs, controllers, schedulers, Kubernetes and Slurm, fabric managers, telemetry
AI-runtime security	Training and serving software	Triton, Dynamo, CUDA and ROCm, containers, model loading, inference APIs
Cyber-physical AI-factory security	Power and cooling	800 VDC power, cooling distribution units, substations, building controls

Note: The seventh area grows as racks move to megawatt scale: a compromise of cooling or power orchestration becomes a compute-security event, not only an OT incident.

Source: DSCI, Supercomputing Radar (Trust and Security view).

15

Mapping the ecosystem: DSCI's semiconductor radar

From tracking investment to mapping dependence: a bottom-up map of chips, control and concentration.

5 questions turn an ecosystem map into a dependency map	**7** areas in the first reading of what to build at home or secure through partners	**4** audiences the radar serves: government, investors, enterprises, researchers

A technology radar gives a running view of which technologies are emerging, maturing or stalling, so that support arrives in time. Under TechSagar, each radar maps the component technologies in a domain, the organisations developing them, reported breakthroughs and each technology's readiness level. Read side by side, the supercomputing, EV and 6G radars converge on one layer: accelerators and HBM for AI, SiC and GaN for EVs, and RF and baseband chips for 6G. The semiconductor radar makes that layer explicit and adds a national-security lens: who controls the technology, where supply is concentrated, and what can be verified and substituted at home.

Government	Investors	Enterprises	Researchers and start-ups
Evidence to direct missions, grants and procurement; early warning of narrow foreign dependence	Lower cost of discovery: readiness levels, active organisations and direction of travel	When to adopt, whom to partner with, and which risks planning for before deployment	Where gaps remain, and visibility with funders and adopters

A national-security dependency map

Table 21. Five questions turn an ecosystem map into a dependency map

Question	What it maps	Why it matters in a crisis
Which sectors use which chips?	Banking, telecom, power, defence and AI infrastructure, and the chip categories each relies on	Shows where a shortage or compromise is felt first
Who controls each stage?	Ownership and location of design IP, fabrication, packaging, test, firmware and update channels	Identifies who could alter or withhold a component
Where is supply concentrated?	Number of qualified sources per chip category and their geographic spread	Reveals single points of failure
What can be verified?	Whether provenance, integrity and firmware can be checked by Indian institutions	Separates evidence-based trust from faith
What can be substituted?	Domestic or trusted-partner alternatives and time to qualify them	How long critical systems can run through a disruption

Source: DSCI analysis.

Placed on this map, exhibitor lists, MoUs and investment figures become more consequential: each plant, supplier or partnership can be read for whether it reduces a concentration, closes a verification gap, or adds capacity where India is already served. A new high-purity gas supplier near Dholera shortens a critical supply line; a new design centre adds talent but may leave control of the resulting IP unchanged.

Table 22. An illustrative first reading: what to build at home and what to secure through partners

Area	Dependence observed (2026)	Suggested approach
Chips for defence and space	Largely produced at home (GAETEC, SCL); some gases and reactors imported	Build at home; localise remaining inputs
Mature-node logic and power devices	First commercial wafer due 2028; SiC fab under construction	Build at home with technology partners
Assembly, test and packaging	Five units producing, nine approved	Build at home; add security baselines as lines ramp
Processor IP	RISC-V cores (SHAKTI, VEGA) alongside licensed architectures	Build at home for critical uses
Leading-edge logic and HBM	Capacity concentrated in Taiwan and South Korea	Secure through partnerships and dual sourcing
Lithography and advanced equipment	A few global suppliers; in-country support arriving	Secure through partnerships, with local service capability
Chip design software (EDA)	A small number of global vendors	Secure through partnerships; track indigenous alternatives

Note: Illustrative; reflects the evidence in Chapters 05 to 12 and is not a policy classification.

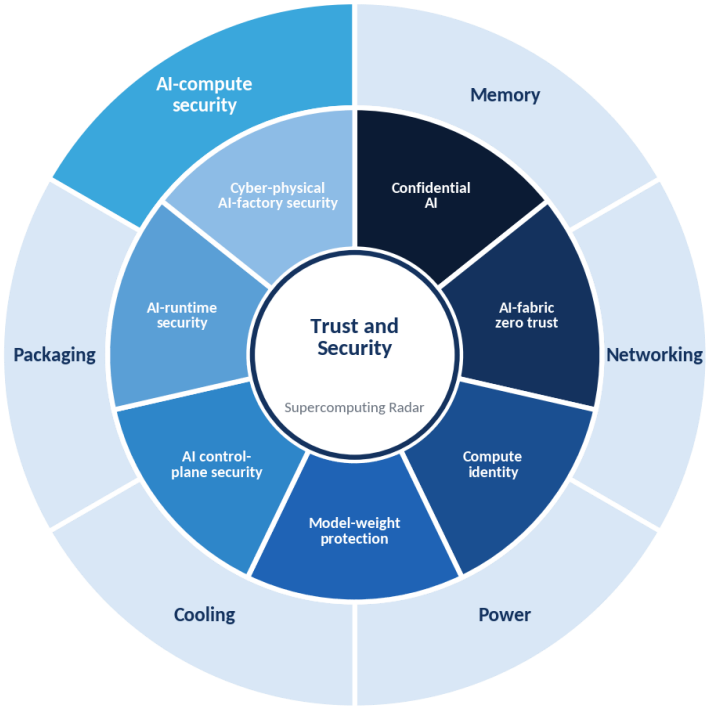
Source: ISM; The Week; Business Standard; PR Newswire; DSCI analysis.[4,21,68,69]

Keeping the map current

The radar is updated as evidence arrives plant milestones, supplier localisation, reported incidents and changes in technology readiness. The semiconductor security cohort (Chapter 14) offers an industry channel for testing the map against practice. This report began with capacity and closes with trust, because the value of that capacity to India's critical systems depends on whether the chips it produces, and those it continues to import, can be relied upon in a crisis.

Figure 28. AI-compute security is tracked as a frontier in its own right

Supercomputing Radar: compute-tracker frontiers (outer ring) and the Trust and Security view (inner ring)



Outer ring

Frontiers in the compute tracker. AI-compute security is now tracked as a frontier in its own right.

Inner ring

Seven frontier areas of AI-compute security, followed in the Trust and Security view of the Supercomputing Radar.

Source: DSCI.

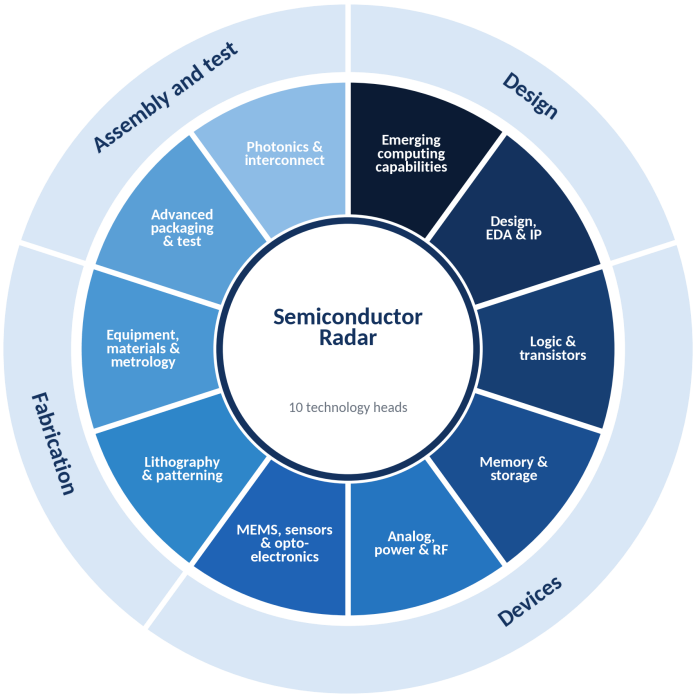
The Semiconductor Radar

The Semiconductor Radar is DSCI's running view of the technologies that make up the chip industry. Like the supercomputing, EV and 6G radars, it is built bottom-up on TechSagar. It organises the field into ten technology heads that together cover the value chain: new computing paradigms and chip design; the devices themselves, from logic and memory to analog, power, RF and sensors; the tools and materials used to make them; and the packaging, test and interconnect that turn dies into working systems (Figure 29). Under each head the radar tracks the component technologies, the Indian and global organisations developing them, reported breakthroughs and each technology's readiness level.

Read through the national-security lens of Table 21, the ten heads show where India's capability is forming and where dependence persists. Chip design and advanced packaging and test are where Indian activity is densest today, while EDA tools, lithography and patterning, and much of equipment, materials and metrology rest on a small number of foreign suppliers. Emerging computing capabilities and photonics and interconnect are the frontiers to watch, because they will shape which chips India's critical systems need over the next decade. Tracking all ten heads side by side lets the radar flag early when a new technology creates a fresh dependence, and when Indian capability is ready to be backed.

Figure 29. The Semiconductor Radar tracks ten technology heads across the chip value chain

Semiconductor Radar: technology heads (inner ring) grouped by value-chain stage (outer ring)



Outer ring

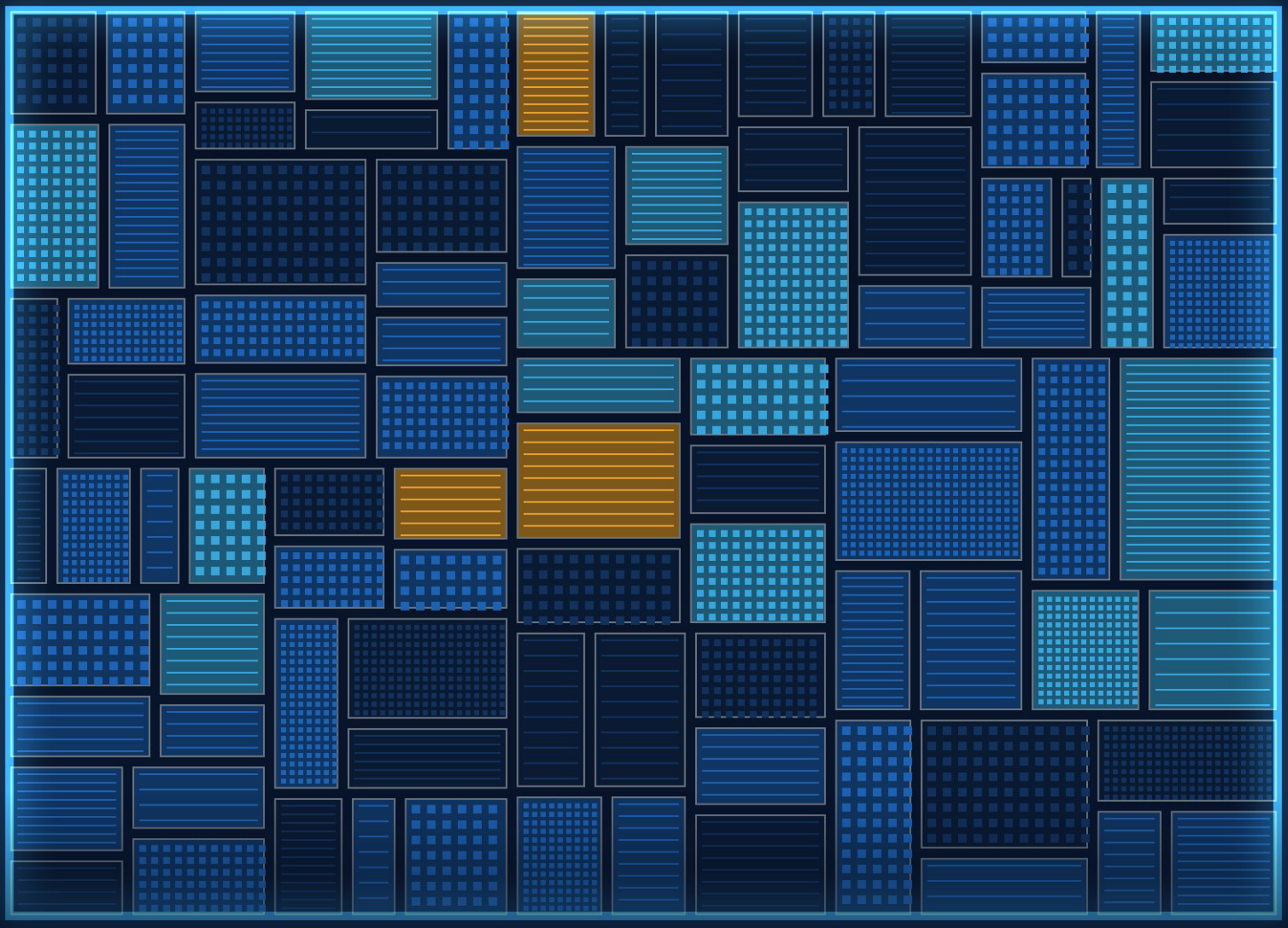
The stage of the chip value chain in which each technology head sits, from design to assembly and test.

Inner ring

Ten technology heads tracked in the Semiconductor Radar, each broken down into the component technologies it follows.

Note: Grouping by value-chain stage is indicative; some heads, such as photonics and interconnect or equipment, materials and metrology, span more than one stage.

Source: DSCI.



Appendices

Reference material

Glossary, notes on data and calculations, and the sources cited in this report.

In this section

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B	Notes on data and calculations	58
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A

Glossary

Terms used in this report.

Term	Meaning
AI factory	A data centre built to train and run AI models at industrial scale, with thousands of accelerators working as one system.
ATMP / OSAT	Assembly, testing, marking and packaging; outsourced semiconductor assembly and test. The back-end stage that turns wafers into packaged chips.
Attestation	Cryptographic proof that a device, firmware or computing environment is genuine and unaltered.
BMC	Baseboard management controller: a small processor that manages a server's hardware independently of its main operating system.
C2S	Chips to Start-up programme for chip-design training at academic institutions.
Compound semiconductor	Devices made from materials such as silicon carbide (SiC) or gallium nitride (GaN), used in power electronics, RF and displays.
Confidential computing	Protecting data while it is processed, inside hardware-isolated, attested environments.
Dependency map	A mapping of which sectors rely on which chips, who controls each stage, where supply is concentrated, and what can be verified or substituted.
DLI scheme	Design Linked Incentive scheme supporting semiconductor design companies in India.
DPU	Data processing unit: a network processor that offloads and isolates networking, storage and security tasks.
ECMS / SPECS	Electronics Components Manufacturing Scheme; Scheme for Promotion of Manufacturing of Electronic Components and Semiconductors.
EDA	Electronic design automation: software used to design and verify chips.
Fab / foundry	A wafer fabrication plant (the front end). A foundry makes chips designed by other companies.
Glass substrate	A packaging substrate of glass rather than organic laminate, offering flatness and finer interconnects.
HBM	High-bandwidth memory: stacked DRAM packaged next to AI processors.
Lakh / crore	1 lakh = 1,00,000; 1 crore = 1,00,00,000 (10 million). ₹9,500 crore = US$1 bn at ₹95 per US dollar.
MMIC	Monolithic microwave integrated circuit, used in radar, electronic warfare and satellite communication.

Term	Meaning
MoU	Memorandum of understanding: a statement of intent that precedes binding investment.
Operational technology (OT)	Hardware and software that monitor and control physical equipment, such as fab tools, power and cooling.
Pax Silica	A coalition for secure and resilient technology supply chains; India joined in February 2026.
Provenance	A verifiable record of where a component was designed, made, packaged and tested, and how it was supplied.
RISC-V	An open, royalty-free processor instruction set; SHAKTI (IIT Madras) and VEGA (C-DAC) are Indian implementations.
Root of trust	A hardware component that anchors a device's security, verifying each piece of software as the system starts.
Semicon 1.0 / 2.0	The first (2021) and second (2026) phases of the India Semiconductor Mission. The second has six pillars: design, machines and materials, fabs, advanced packaging, R&D, and talent.
State top-up	Additional capital support from a state government, stated as a share of the central incentive.
Stranded compute	AI processors left idle when an attack disables the shared systems they depend on.
Tape-out	The point at which a chip design is finalised and sent for fabrication.
TechSagar	DSCI's platform for mapping technology capability, under which it maintains technology radars.
TEE	Trusted execution environment: a hardware-isolated area of a processor protecting code and data.
TRL	Technology readiness level: a scale of maturity from early research to proven operation.
Trusted foundry	A fab or packaging line certified to supply critical uses under controlled, verifiable conditions.

B

Notes on data and calculations

How the figures were compiled, and the logic behind every derived number.

This report draws on releases from the Prime Minister's Office, MeitY, PIB, the India Semiconductor Mission and SEMI; market data from WSTS, SIA, Gartner and TrendForce; market estimates from Kotak Mahindra Mutual Fund and Deloitte; analysis by NITI Aayog, SIA and BCG and CSIS; and wire and trade coverage published up to September 2026. Global figures are calendar years; import and production figures are Indian financial years (April–March); India market figures measure consumption and are not directly comparable with global sales.

Currency. All values are shown in ₹ crore with the US$ billion equivalents in brackets at ₹95 per US dollar (September 2026). US$ equivalents may therefore differ from figures announced at earlier exchange rates (for example, Micron's US$2.75 bn in 2023 and the first phase's ~US$10 bn in 2021). **N** on each chart is the number of entities, observations or estimates plotted. The map shows the external boundary of India as depicted by the Survey of India; internal boundaries are indicative and the map is not to scale.

Table 23. Register of DSCI analysis

Every calculation or classification made for this report, with its working

Derived figure	Chapter	Logic (DSCI analysis)
Currency conversion	All	US$ bn × 9,500 = ₹ crore; ₹ crore ÷ 9,500 = US$ bn (₹95 per US$, September 2026). Rupee-announced values are kept as announced.
Investment multiplier (2.2×) — DSCI Insights	03	₹1,63,659 crore approved investment ÷ ₹76,000 crore first-phase outlay = 2.15 ≈ 2.2
Second phase vs first phase (+68%)	03	₹1,27,500 crore ÷ ₹76,000 crore − 1 = 67.8%
Combined public outlay	02, 03	₹76,000 crore + ₹1,27,500 crore = ₹2,03,500 crore = US$21.4 bn
Operating share of capital (21.0%)	01, 05	(22,516 + 7,600 + 3,307 + 117 + 868) = ₹34,408 crore ÷ ₹1,63,659 crores
Capital under construction	10	₹1,63,659 crore − ₹34,408 crore = ₹1,29,251 crore
Tata share of capital (72%)	05	(₹91,000 + ₹27,000) crore ÷ ₹1,63,659 crore = 72.1%
State shares	07	State's approved capital ÷ ₹1,63,659 crore (e.g. Gujarat ₹1,28,359 crore = 78.4%)
Approval-to-production lead time	05	Months between Cabinet approval and announced start of commercial production: Micron 32, CG Semi ~28, Kaynes 18, CDIL 13; Suchi Semicon (about 4.5 months, approved 2026) shown separately

Derived figure	Chapter	Logic (DSCI analysis)
Import growth (23% a year) and FY35 trend	02	(30.3 ÷ 5.7) ^ (1/8) − 1 = 23.2%; 30.3 × 1.232^10 ≈ US$240 bn, reproducing NITI Aayog's FY35 trend projection
Electronics output growth (≈7×)	02	₹13,11,000 crore (FY26) ÷ ₹1,90,000 crore (FY15) = 6.9
India share of global market (~4%)	02	US$62 bn (Kotak, 2026) ÷ US$1,510 bn (WSTS, 2026); indicative only, as India's figure measures consumption
Market growth rates	02	Kotak (155 ÷ 62) ^ (1/5) − 1 = 20.1%; Deloitte (300 ÷ 120) ^(1/5) − 1 = 20.1%
Ecosystem shares	03	Machines and materials 318 ÷ 522 organisations mapped to a single pillar = 61%
Design start-up conversion	09	20 VC-funded ÷ 105 supported = 19%; 200 × 19% ≈ 38; ₹800 crore ÷ 20 ≈ ₹40 crore each
Design training progress	09	70,000 ÷ 85,000 = 82%
Japan vs India envelope (~3×)	10	US$65 bn ÷ US$21.4 bn = 3.0
Foreign funding envelopes	02, 06, 10	Foreign US$ values as reported at announcement (EU at about US$1.09 per euro; South Korea at about ₩1,400 per US$); US$ bn × 9,500 = ₹ crore
Foundry shares not reported individually	06	Hua Hong Group and all others derived from TrendForce Q2 2026 revenue figures; all shares sum to 100%
Regional capacity shares, 2032	06	Japan, Europe and others derived from regional growth rates reported by SIA and BCG; shares sum to 100%
Stranded compute (illustrative)	15	1,00,000 GPUs × an assumed US$30,000–40,000 each = US$3–4 bn ≈ ₹28,500–38,000 crore; an assumption, not a sourced price
Classifications	06, 07, 12, 16	Cluster status, global leadership and dependence readings are DSCI classifications with the rules stated beside each exhibit

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542 companies used for analysis

The exhibitors at SEMICON India 2026 (New Delhi, 17–19 September 2026) whose profiles make up the DSCI ecosystem mapping used in this report, listed alphabetically as registered with the organisers. Their inclusion reflects participation in the event, not endorsement by DSCI.

3D Glass Solutions	3M INDIA LIMITED	ABB India Limited
ABLROOTS INDUSTRIES PVT PTD	ABV ENGINEERS AND CONSULTANTS PVT LTD	AC&C Technology Pte Ltd
Accurex Solutions Pvt. Ltd	ACM Research Inc.	Adaptsys Limited
Addverb Technologies	Advance Panels & Switchgears P Ltd	ADVANCED EXPERTISE TECHNOLOGY PVT. LTD.
ADVANCED SEMICONDUCTOR EQUIPMENT TECHNOLOGY SINGAPORE	ADVANCED SYSTEM IN PACKAGE TECHNOLOGIES	Advantec Materials India Pvt Ltd
Advantest (Singapore) Pte. Ltd.	AECOM India Private Limited	Aequs SEZ Private Limited
Aeromech Equipments Private Limited	Aether Semiconductors Private Ltd	AGC Asia Pacific (India) Pvt. Ltd.
AGEM Innovation Private Limited	Agilent Technologies	Agnisys Technology Pvt. Ltd
AGNIT Semiconductors Pvt Ltd	AGRU Plastic Technology Pvt Ltd	AHEESA DIGITAL INNOVATIONS PRIVATE LIMITED
Aimil Ltd	Air Liquide India Holding Pvt Ltd	Air Water India Pvt Ltd
AirLife Gases Pvt. Ltd	AIRTECH SYSTEMS INDIA PVT LTD	Akribis Systems Pte Ltd
Akros Trading India Pvt Ltd	ALIGNED TEST PTE LTD	ALLIED RESOURCING
AMD India Private Limited	Ami Polymer	Amity University Uttar Pradesh Noida
Ample Semiconductors Private Limited	ANANANT SYSTEMS PRIVATE LIMITED	Andhra Pradesh Economic Development Board - Govt of Andhra Pradesh
ANEMO PRIME	Anora Instrumentation Private Limited	Ansell India Protective Pvt Ltd
APK AQUATECH PVT. LTD.	APP SYSTEMS SERVICES PTE LTD	Applied Materials India Pvt. Ltd.
Aquatech Systems (Asia) Pvt. Ltd.	Arvind Envisol Limited	ASAHI DIAMOND INDUSTRIAL INDIA PVT. LTD.
Ascentrade India Private Limited	ASM HHV ENGINEERING PRIVATE LIMITED	ASM Technologies LTD
ASML Technology Taiwan Ltd	ASMPT Singapore	Assam Industrial Development Corporation Limited (Government of Assam)
Astec Valves & Fittings Pvt. Ltd.	Asterion Semitech Private Limited	Astro Plasma Private Limited
Atantri Communications Pvt Ltd	ATCO ATMOSHPERIC AND SPECILAITY GASES	Atlas Copco India Private Limited
Automated Tooling Systems India Pvt. Ltd	AVANT GARDE CLEANROOM & ENGG. SOLUTIONS PVT LTD	Avcon Technics Pvt Ltd
Axiro Semiconductor Private Limited	AZELIS (INDIA) PRIVATE LIMITED	BABA FINE CHEMICALS
Bangalore Refinery Pvt Ltd.,	Bergen Systems Pvt. Ltd.	Besi Singapore Pte. Ltd.
Bharat Forge Limited	Bharat Semitech Pvt LTd	Bharatam Mechatronics Private Limited
BHORUKA SPECIALTY GASES PRIVATE LIMITED	Bigprosolution PVT LTD	BIS INFOTECH
BMT Co., Ltd.	Brain Domain Pte Ltd	Bruker India Scientific Pvt Ltd
Bry-Air (Asia) Pvt. Ltd.	Business Sweden	Cadence Design Systems
CADFEM India - Ansys Elite Partner	CALIBER INTERCONNECTS PRIVATE LTD	Canon Singapore Pte Ltd
Carl Zeiss India (Bangalore) Pvt Ltd	CCD Technical Solutions Pvt Limited	CDIL Semiconductors Private Limited
CECO Environmental Solutions India Pvt. Ltd.	Centre for Development of Advanced Computing	Centre for Nano Science & Engineering (IISc)
Centre for Semiconductor Technologies (SemiX) IIT Bombay	CeramTec GmbH	CG SEMI PRIVATE LIMITED
Chasen (India) Hi-Tech Logistics Services Private Limited	CHIPEX TECHNOLOGIES PRIVATE LIMITED	ChipIN Centre
Chipspirit Technologies Pvt Ltd	Chukoh Chemical Industries Limited	Cir-Q-Tech Tako Technologies Pvt. Ltd.
circuitEvolve	CKD Corporation	Clariant
CleanTech Services India Pvt Ltd	CN Water Systems Private Limited	CNW- Courier Network
Cohizon Life Sciences	CoreTech System (Moldex3D) Co., Ltd.	COVERIFY SYSTEMS TECHNOLOGY LLP
CraftifAI	Cryogenic Specialty Manufacturing Sdn. Bhd.	Crystal Matrix Limited
Cubetor India Private Limited.	Cyient Semiconductors Pvt Ltd	DAIFUKU CO, LTD.
DAIICHI JITSUGYO INDIA PVT. LTD.	DAIKIN CHEMICAL INDIA PRIVATED LTD.	Daksh Instruments Pvt Ltd
Danfoss Industries Pvt. Ltd.	Dassault Systèmes	DCAS Technologies
DDE ULTRA HIGH PURITY PRIVATE LIMITED	DeepLase Technologies	Deerns Spectrum Private Limited

Delta Electronics India Pvt Ltd	Department of Industries, Govt. of Bihar	DHL Supply Chain India
Dhruv Compusoft consultancy pvt ltd	Disco Hi-Tec (Singapore) Pte Ltd.	Dixon Technologies (India) Limited
Dockweiler India Pvt Ltd	Dou Yee Enterprises (S) Pte Ltd	DTECH PRODUCTS PVT LTD
Durga Mechatronics Pvt. Ltd.	DYNA Filters Private Limited	E3 TECH SYSTEMS AND SERVICES LLP
Ebara Corporation	Ecolab	EdgeCortix India Research Center Pvt Ltd
Edgetech Air Systems Pvt. Ltd.	EDGETECH SCIENTIFIC PRIVATE LIMITED	Edveon Technologies Private Limited
Edwards India Pvt Ltd	EFY Enterprises Pvt Ltd	Einnosys Technologies
El Camino Technologies Pvt Ltd	Ellipsiz DSS Pte Ltd	Eltech Engineers Pvt Ltd
EO Technics Singapore Pte, Ltd.	Esmo Asia Pte. Ltd.	EV Group
Evatec AG	Evident Scientific Private Limited	Fabtech Technologies Cleanrooms Pvt Ltd
FEC India Private Limited	FELCON CLEAN ROOM TECHNOLOGY (INDIA) PRIVATE LIMITED	Festo India Private Limited
FILMTEC WATER SOLUTIONS INDIA PRIVATE LIMITED	FIXOTEC PIPE SUPPORTS PRIVATE LIMITED	Flowell Corporation
Fluor	Fluro Engineering Pvt Ltd	Forbes Marshall Pvt Ltd
FS COMPRESSORS INDIA PVT LTD	FUJIFILM India Pvt. Ltd	Fujikin, Incorporated
GAMP SERVICES PVT LTD	Gastron Asia Pacific Pte. Ltd	GCE India Pvt. Ltd
GENIC Co. Ltd.	GenISys GmbH	GERB Vibration Control Systems Pvt Ltd
GfG - Gesellschaft für Gerätebau mbH	Global Gases India Pvt Ltd	Global Marketing Services
Global Now Pte. Ltd.	GLOBAL ZEUS	GLOBETEK INDIA PRIVATE LIMITED
GMP Technical Solutions Pvt Ltd	Gopalam Embedded Systems Pte Ltd	Government of Telangana
Grauer and Weil (India) Limited	Green PMU Semi Private Limited	Greene Tweed & Co./Vin-Tec Engineers
Grindwell Norton Ltd.	GRUNDFOS PUMPS INDIA PVT LTD	GST CO., LTD.
Guidance Tamil Nadu	GUJARAT FLUOROCHEMICALS LTD	Gujarat State Electronics Mission
H2LooP AI pvt. ltd.	Hae Kwang Co., Ltd.	HAMAMATSU PHOTONICS K.K.
Handotai India Pvt Ltd	HANKOOM WATTTECH ENERGY INDIA PRIVATE LIMITED	Hankyu Hanshin Express India Pvt. Ltd.
HCLTech	HCP Technologies Private Limited	Hegzaflon Global pvt ltd
Heidelberg Instruments Mikrotechnik GmbH	HIGGS BOSON SYSTEMS PRIVATE LIMITED	HIGHSTAR TECHNOLOOGY PRIVATE LIMITED
Hilti India Private Limtied	Hitachi High-Tech	Hitech Tools & Instruments
HMC Sales & Service	Homwell Co., Ltd.	Honeywell International India PVT LTD
HORIBA India	HP Valves & Fittings India Private Limited	HTL COMPANY INDIA PRIVATE LIMITED
Huake Engineenring India pvt. ltd.	Humidity Technologies India	HVAX TECHNOLOGIES LIMITED
HYC Precision Engineering Private Limited	HYSPEC CHEMICALS PRIVATE LIMITED	I R Technology Services Pvt Ltd
IBM India Private Limited	Ihara Science Corp.	INABATA&Co., Ltd.
InCore Semiconductors Private Limited	Indian Design, Semiconductors, Packaging and Systems (IDSPS)	Indian Institute of Information Technology and Management Kerala
Indnix Technology Limited	Industrial Vision Technology (S) Pte Ltd.	Infosys
Ingersoll Rand India Ltd.	INNOWELL ENGINEERING INTERNATIONAL PVT LTD	INOX Air Private Limited
Integrated Cleanroom Technologies Pvt. Ltd.,	IntelliSense Software	INTERNATIONAL FACILITY ENGINEERING PTE. LTD.,
International Green Technology Japan	INTERTEC SQUARED INC	Intics.ai INC
INVENTEC Performance Chemicals	Ion Exchange (India) Ltd.	Iwate Industry Promotion Center
izmo microsystems private limited	Janatics Global Solutions Pvt. Ltd.	Japan India Business Bureau (NPO)
JEOL INDIA PRIVATE LIMITED	Jiangsu Jinggong Semicon Equipment Co., Ltd	Jindal SAW Ltd.
Jipal Hi-Tech	JITECH INDIA PRIVATE LIMITED	JMJ Korea Co., Ltd
JSR Electronic Materials Singapore Pte Ltd	JT Corp.	Jubilant Ingrevia Limited
Jung Sung Tech Co.,Ltd.	Kaijo Corporation	Kanken Techno Co., Ltd.
Karnataka Innovation and Technology Society, Government of Karnataka	Kay International Pvt. Ltd.	Kaynes Semicon Private Limited
KEYSIGHT TECHNOLOGIES INDIA PRIVATE LIMITED	Khurana & Khurana (K&K)	KIANSH INTERNATIONAL TECHNOLOGIES PVT LTD
Kinesis Semiconductor Wire Solutions India Pvt Ltd	KISCO LTD.	KITZ SCT CORPORATION
KLA Corporation	Kleenclad International Private Limited	KOCOS
KOKUSAI ELECTRIC	Korea Trade-Investment Promotion Agency (KOTRA)	KPT Piping System Private Limited
Krisemi Design Technologies Pvt Ltd	KRISHNA INTERNATIONAL INSTRUMENTS	Kuehne + Nagel India
Kulicke & Soffa Pte Ltd	Kurin Tech Private Limited	Kyoritsu Electric India Pvt. Ltd.
L&T Semiconductor technologies	Labindia Instruments Pvt. Ltd.	Labort Fine Chem Pvt Ltd
Lam Research India Pvt Ltd	LanceSoft, Inc.	Lasertec U.S.A., Inc.

LeadIC Design	Leica Microsystems-A Division of DHR Holding India Pvt Ltd	LightSpeed Photonics
Linde India	Lindstrom India	LINTEC ADVANCED TECHNOLOGIES (SINGAPORE) PTE LTD
LINTEC Co., Ltd.	LPS Bossard Pvt. Ltd.	Lucky Deep Cleanroom Pvt. Ltd.
MacDermid Alpha Electronics Solutions	Machine House (India) Pvt. Ltd.	Madhya Pradesh State Electronics Development Corporation (MPSEDC)
Maharashtra Industrial Development Corporation	MASCOT SYSTEMS PRIVATE LIMITED	MatterWave Technologies Private Limited
Maverick Engineering Company	Maxell Asia, Ltd	MAXIM SMT TECHNOLOGIES PVT LTD
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Mel Systems and Services Limited	Membrane Group India Pvt Ltd	Membrane Solutions Corp.
Merck Performance Materials Co., Ltd.	Metkorp Equipments Pvt Ltd.	Mettler-Toledo India Pvt. Ltd
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Micron Technology Operations India LLP	Mihama India Pvt Ltd	Millice PTE LTD
Mindgrove Technologies	Mindox Techno Pte. Ltd.	Mirafra Software Technologies Pvt. Ltd.
Misumi India Private Limited	Mitsui Chemicals India Pvt. Ltd.	Mitutoyo South Asia Private Limited
Modutek Corporation	Morimura Brothers Trading India Pvt Ltd	Morphing Machines Private Limited
MOSCHIP	MTU India Private Limited	Multi Nano Sense Technologies Private Limited
MumbaiSemi	MyCAE India Pvt Ltd	Nagase India pvt ltd
Nano Clean Technologies	Nanoscale Research Facility, IIT Delhi	Nasscom
National Institute of Technical Teachers Training and Research	Navin Fluorine International Limited	NeevSemi India Private limited
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Shin-Etsu Polymer India pvt ltd	SHREE VISHWAKARMA	SiCSem Private Limited
SignOff Semiconductors	Silicon Creations	SIMCO Global Technology & Systems Ltd.
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ThirdAI Automation Inc	THK India Private Limited	TMEIC Industrial Systems India Private Limited
Toho international Inc.	Toho Koki Seisakusho Co., Ltd.	Tokyo Electron Limited (TEL)
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Transport Corporation Of India Limited	TriQuanta Labs	Trojan Technologies
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Unites Systems a.s.	UST	Uttar Pradesh Electronics Corporation Limited
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VT VACUUM TECHNOLOGIES PVT LTD	Waaree Clean Energy Services	WFD Pavilion
Wisely Gobal Solutions Pte Ltd	WOG Technologies Limited	Yamaha Robotics Co., Ltd.
Yield Engineering Systems India Pvt ltd	Zestron Surface Technology Solutions India Private Limited	

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Data Security Council of India (DSCI), set up by Nasscom, is a not-for-profit industry body and think tank on data protection, cyber security and critical technologies in India. DSCI is committed to making cyberspace safe, secure and privacy-assured, and to advancing critical technologies vital for national security through policy advocacy, thought leadership, capacity building and outreach initiatives. DSCI engages with the government, regulators, defense, law enforcement agencies, embassies, industry members and academia to position India as a leader in the global digital ecosystem.

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