

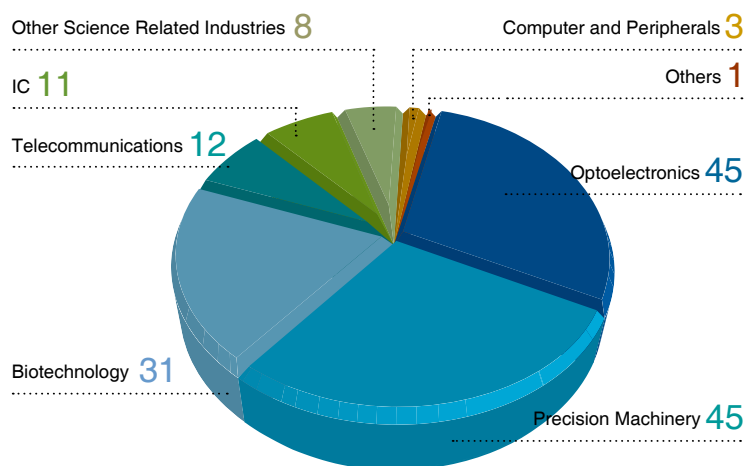
Industrial Builder and the Giant Wheel, the STSP

Industrial Trend

Industrial Investment

As the world is still dealing with the economic recession, the STSP continues its efforts of the previous years. By the end of 2009, the number of existing approved enterprises reached 156 and in 2009 alone, the investment of an additional 18 Park enterprises in the STSP was successfully approved, including ten from biotechnology, five from optoelectronics, two from precision machinery, and one from the telecommunications industry while 14 presented themselves at the Kaohsiung Science Park and four at Tainan Science Park with an approximate approved investment amount of NT\$2.3 billion.

Total Effective Number of Approved Enterprises by Industry (As of the end of 2009)

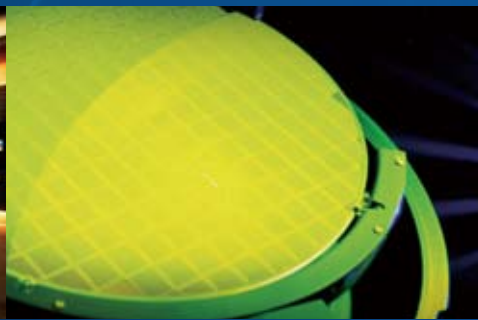


Total Effective Number of Approved Enterprises by Year

	1998 Before	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Effective Number of Approved Enterprises	20	29	47	65	91	114	132	138	144	155	158	156



Optoelectronics Industry



IC Industry



Biotechnology and Medical Device Industry

Investment Trend of the Industrial Clusters

Optoelectronics Industry

The STSP has Taiwan's most integrated optoelectronics industrial cluster and by the end of 2009, the existing approved Park enterprises totaled 45 with the presence of five additional new Park enterprises in 2009. In terms of Flat Panel Display, fabs that started mass production include two Generation 3.5-4, four Generation 5-5.5, one Generation 6, and one Generation 7.5. One Generation 8.5 is now under construction. The presence of G-Tech Optoelectronics, Nissan Chemical Taiwan, and New E Materials at the STSP was approved in 2009. Park enterprises engaged in the solar cell industry range from upstream material, middle stream cell producers to downstream modules and system products including companies such as Motech, Gloria Solar, Chi Mei Energy, Kenmos PV, AURIA Solar, AxunTek, Everphoton Energy, King Enertech System, Delta Electronics, and Ag Pro Technology. LED manufacturers presenting at the STSP are upstream material and downstream packing and system suppliers, including companies such as EPISTART, UBILUX, Genesis Photonics, Epileds Technologies, and ISTI.

IC Industry

By the end of 2009, 11 IC approved manufacturers were in presence at the STSP. In addition to mass production of Fab 6 (8-inch wafer fab) and Phase 1, 2, and 3 of Fab 14 (12-inch wafer fab) of TSMC, at present, TSMC is constructing its advanced wafer packaging fab that is expected to start mass production in September 2010. Phase

1 and 2 of Fab 12 A of UMC at the STSP are in mass production stage and Phase 3 is at the equipment installation stage and UMC has set up its R&D Center at the STSP making the STSP become one of the most important 12-inch wafer fab clusters in Taiwan.

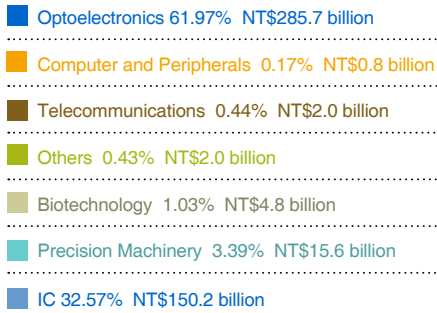
Precision Machinery Industry

By the end of 2009, the investment of 45 precision machinery manufacturers was in presence with two newly-approved enterprises that specialize in solar cell conversion efficiency testing and measuring equipment and atomic force microscope equipment production providing real-time and interactive services for IC and optoelectronics factories that help to achieve time and cost efficiency and create opportunities of mutual benefit for different businesses.

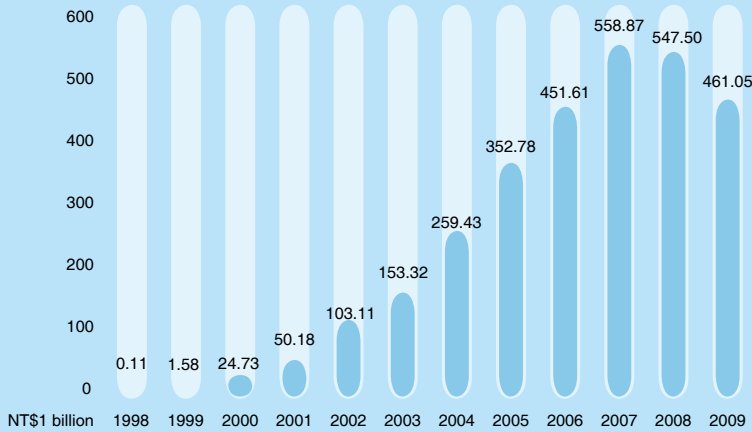
Biotechnology Industry

The biotechnology industry generated the highest turnover and investment approval growth rates at the STSP in 2009. The existing approved Park enterprises in this industry reached 31 with the presence of ten new Park enterprises by the end of 2009. Since the implementation of the "Southern Taiwan Biomedical Device Industrial Cluster Development Plan," 23 applications were approved in 2009 with an approximate grant of NT\$309 million. In addition, research institutions such as Kaohsiung Medical University and Taipei Medical University have set up their R&D Centers at the STSP. The effectiveness of implementation has already been seen and it is expected to boost the prosperous growth of the biotechnology (medical device) industry in southern Taiwan.

2009 Turnover by Industry



Turnover by Year



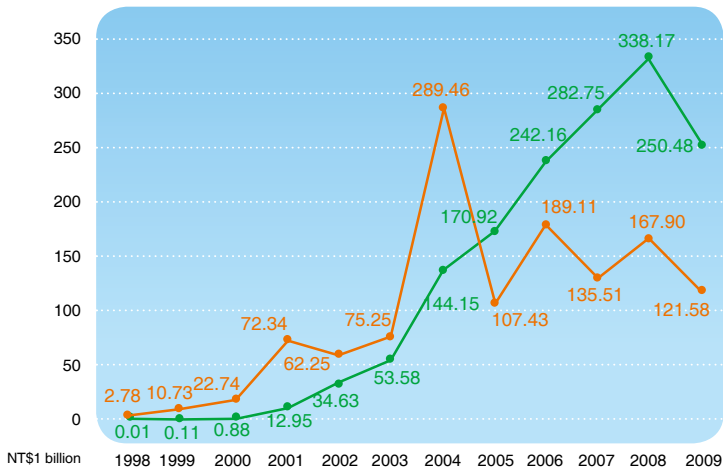
Achievements

The Highest Turnover Growth Rate Generated by the Biotechnology Industry

The overall turnover of the STSP in 2009 totaled NT\$461.05 billion and among which, the contribution from the optoelectronics industry (61.97%) and the IC industry (32.57%) accounted for 94.54% while the biotechnology industry enjoyed the highest growth rate (27.15%).

Import/Export Amount by Year

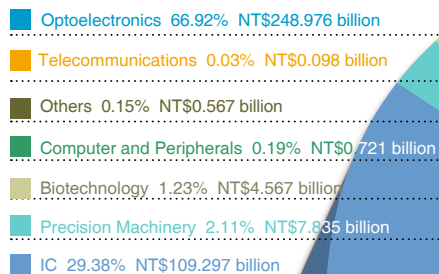
— Import Amount — Export Amount



The Highest Trading Amount Created by Optoelectronics

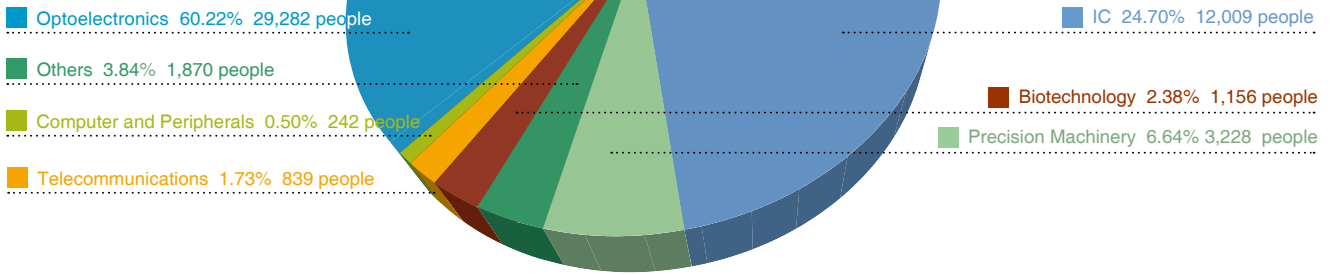
The total import and export amount of the STSP in 2009 reached NT\$372.06 billion and among which, the optoelectronics industry contributed the most with NT\$249 billion and the IC industry came in second at NT\$109.3 billion.

2009 Import/Export Amount by Industry

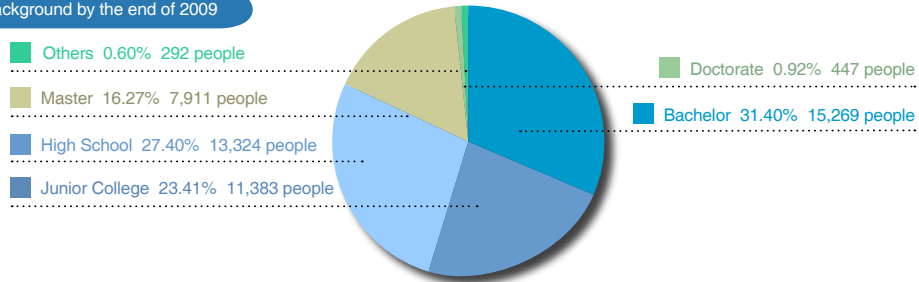


Note: 1. Due to different calculation bases used before December 31, 2007 and after January 1, 2008, it is not suitable to run a comparison of the growth rates.
2. Domestic sales and transfer within the bonded area are excluded.

Workforce by Industry by the end of 2009



Workforce by Educational Background by the end of 2009

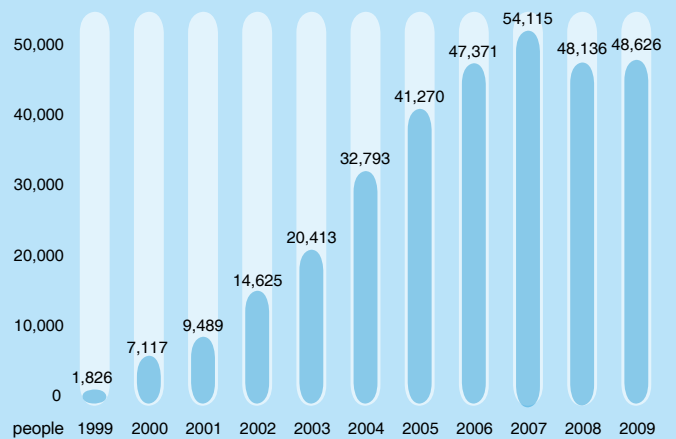


A Park of Hope

The Continuous Growth of Park Employees

As the whole of Taiwan is striving for economic growth, the number of Park employees at the STSP continues growing. Compared with 2008, the number in 2009 grew by 500 for a total of 48,626. The continuous growth of employee numbers is the result of efforts by the Park enterprises.

Workforce by Year



Land Leases

Until the end of 2009, the land allocation rate at Tainan Science Park and Kaohsiung Science Park stood at 70.73% and 73.96%, respectively. In terms of leasing area, leased land reach the area of 453.99 hectares and compared with Hsinchu Science Park and the Central Taiwan Science Park, the STSP leased out more pieces of land.

Land Lease by the end of 2009

