

**The Semiconductor Industry
in India**

Industry Developments, Intellectual Property and Policy



FOREWORD

India's semiconductor sector is expanding from its established base in chip design and engineering into fabrication, assembly, packaging, testing and the supply of specialised materials and equipment. This development brings together industrial investment, technology ownership and public support, with businesses participating through manufacturing projects, design services, proprietary products and technology licensing.

The legal framework protects different elements of semiconductor technology. The Patents Act, 1970 and the Patents Rules, 2003 govern protection for qualifying inventions involving devices, materials, manufacturing processes and related technologies. The Semiconductor Integrated Circuits Layout-Design Act, 2000 provides a separate registration framework for eligible integrated circuit layouts. Software and other qualifying original works are protected under the Copyright Act, 1957, and contractual and confidentiality obligations govern access to proprietary designs, process information and technical know-how. These rights operate alongside the agreements through which technology is developed, licensed, transferred and manufactured.

Public policy supports the sector through the India Semiconductor Mission, the semiconductor and display manufacturing programme, design incentives and state-level assistance. Semicon 2.0 extends this framework across six pillars: design, machines and materials, fabrication, assembly and testing, research and development, and talent development. Related electronics-manufacturing and infrastructure programmes support other parts of the supply chain. Eligibility, financial assistance and disbursement are governed by the applicable scheme notifications, guidelines and approval conditions.

This booklet covers the semiconductor industry and its markets, India's industrial capabilities, business models, opportunities and challenges, central and selected state policies, incentives and application procedures, startup support, research infrastructure and skills programmes. It also examines investment and regulatory requirements, patent protection and filing activity, integrated circuit layout-design registration, copyright, confidential information, IP ownership, licensing and technology transactions.

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How LexOrbis Can Assist

EXECUTIVE SUMMARY

India’s semiconductor sector brings together an established design workforce, growing domestic demand and investments in fabrication, packaging and testing. The policy framework supports participation across this value chain, including equipment, materials, research and skills.



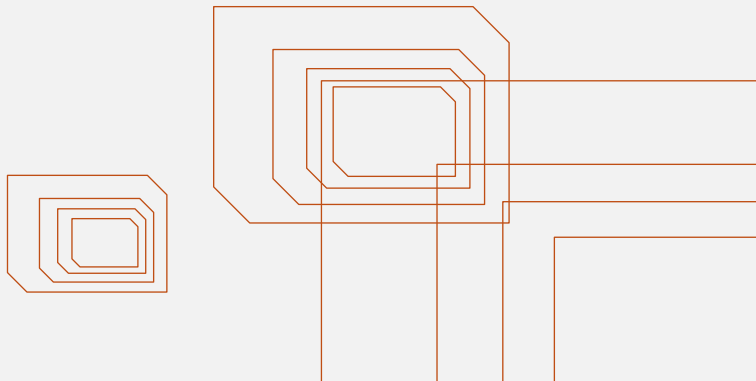
<i>India at a glance</i>	<i>Reported position</i>
<i>Semiconductor market</i>	Nearly USD 64 billion in 2026; projected USD 200 billion by 2035
<i>Domestic demand forecast</i>	USD 110 billion by FY2030; more than USD 200 billion by FY2035
<i>Manufacturing portfolio</i>	12 approved units in 6 states; proposed investment exceeding INR 1.64 lakh crore; 5 units in commercial production as reported on September 17, 2026

Government support

- › The original INR 76,000 crore semiconductor programme established manufacturing and design support.
- › Semicon 2.0, approved in July 2026 with an outlay of INR 1,27,500 crore, extends assistance across six pillars.
- › ECMS has an enhanced outlay of INR 40,000 crore, and selected states provide additional capital, land, utility and training benefits.
- › Programme outlays are distinct from annual budget allocations and project-level entitlements.

Opportunities and conditions

Areas of participation include fabless products, reusable IP, specialised and power devices, advanced packaging, testing, high-purity materials and equipment services. Commercial development depends on technology access, customer qualification, reliable infrastructure, skilled personnel and financing through the development period. IP ownership and licensing arrangements affect collaboration, manufacturing access and commercialisation.



1. INTRODUCTION

Semiconductors are essential components of electronic products and systems, enabling the processing and storage of information, transmission of signals, sensing and control of electrical power. Their applications extend from mobile phones, computers and household appliances to telecommunications networks, vehicles, industrial machinery, medical equipment and energy infrastructure.

The industry supplies a broad range of products, including processors, memory devices, analogue circuits, microcontrollers, sensors and power semiconductors, each serving different technical and operational requirements.

The development of these products involves specialised activities across design, fabrication, packaging and testing, supported by suppliers of materials, equipment, engineering software and reusable intellectual property. Production is organised through international supply chains in which a chip can be designed, manufactured and assembled in different countries. Access to process technology, manufacturing capacity and specialised inputs therefore forms an integral part of semiconductor production. The concentration of these capabilities and disruptions to international supply have increased government attention to domestic manufacturing and supply-chain resilience.

India has multinational development centres, engineering-services companies, domestic chip-design businesses and an expanding manufacturing base. Various central and state programmes support the development of fabrication and packaging facilities, indigenous designs, research capabilities and the infrastructure required for production. The sector's commercial activities consequently encompass both the supply of semiconductor devices and the engineering, materials, equipment and technology used to develop them.

Technology ownership is a significant feature of these activities because semiconductor products frequently incorporate inventions, circuit layouts,

software and confidential manufacturing knowledge developed by several organisations. A product developer may combine its own technology with licensed processor cores, third-party design tools and a foundry's manufacturing process. Statutory IP rights and contractual arrangements determine the ownership and permitted use of these contributions, including their incorporation into commercial products, transfer to manufacturing partners and licensing to customers. The industry's development in India involves the growth of manufacturing and design capabilities together with the legal arrangements through which semiconductor technology is protected and commercialised.

Key Takeaways for Businesses and Investors

Participation extends from chip design and reusable IP to fabrication, packaging and specialist supplies; each activity has different investment and operating requirements.

Technology ownership and permissions for third-party IP form part of product development and commercial supply arrangements.



2. SEMICONDUCTOR MARKET ANALYSIS

The semiconductor market comprises products used in computing, communications, consumer electronics, automotive systems, industrial equipment, healthcare and energy applications.

Demand varies across product categories: processors and memory support computing and data storage, analogue and mixed-signal circuits process real-world signals, and power devices control and convert electrical energy. This diversity creates markets for both advanced computing chips and specialised devices used in established electronic systems.

2.1 Global market value and growth

World Semiconductor Trade Statistics reported global semiconductor sales of USD 795.6 billion in 2025, representing annual growth of 26.2%. Logic and memory were the principal contributors to this expansion, supported by demand for data-centre infrastructure, artificial intelligence and advanced computing.

Indicator	Period	Value billion)	(USD
Worldwide semiconductor sales	2025	795.6	
Worldwide semiconductor market	January-June 2026	702	
Worldwide semiconductor equipment billings	2025	135.1	
Indian semiconductor demand	FY2030	110	
Indian semiconductor demand	FY2035	More than 200	

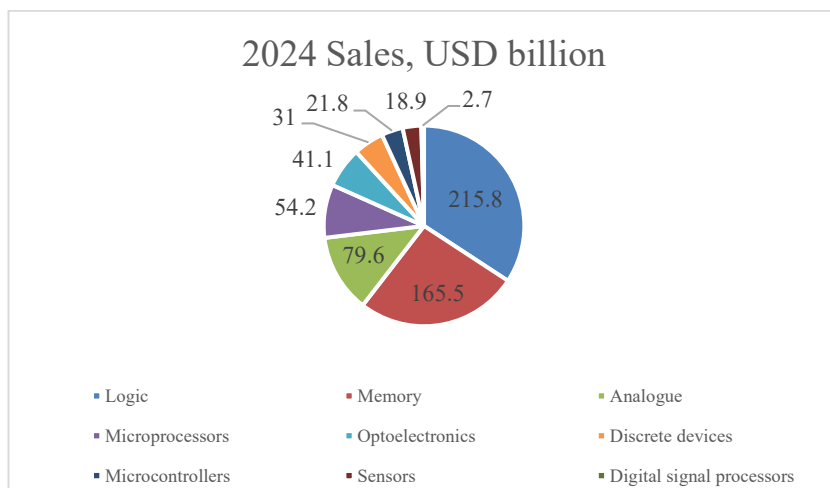
Sources: SIA, WSTS, SEMI and PIB.

2.2 The Indian market and domestic demand

The September 2026 EY-IESA report estimates India's semiconductor market at nearly USD 64 billion in 2026 and projects it to reach USD 200 billion by 2035. A government update published in September 2026 separately projects domestic semiconductor demand of USD 110 billion by FY2030 and more than USD 200 billion by FY2035.

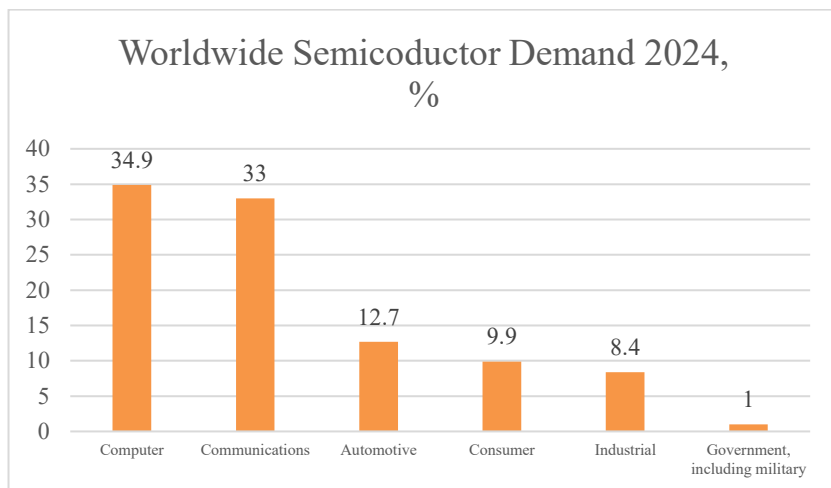
2.3 Product markets and industry statistics

Logic and memory were the largest semiconductor product categories by worldwide sales in 2024. The following tables set out product revenues, end-use demand, Indian imports and manufacturing-equipment spending.



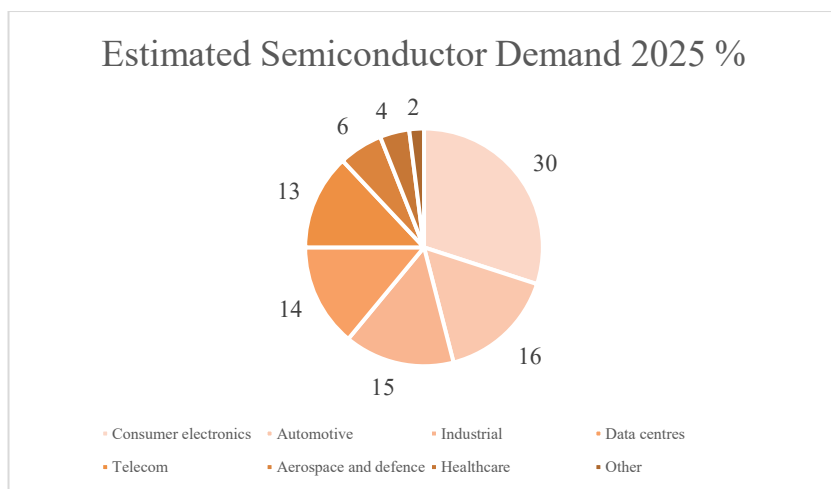
Source: *SIA 2025 Factbook*.

Computing and communications together accounted for 67.9% of worldwide semiconductor demand in 2024.



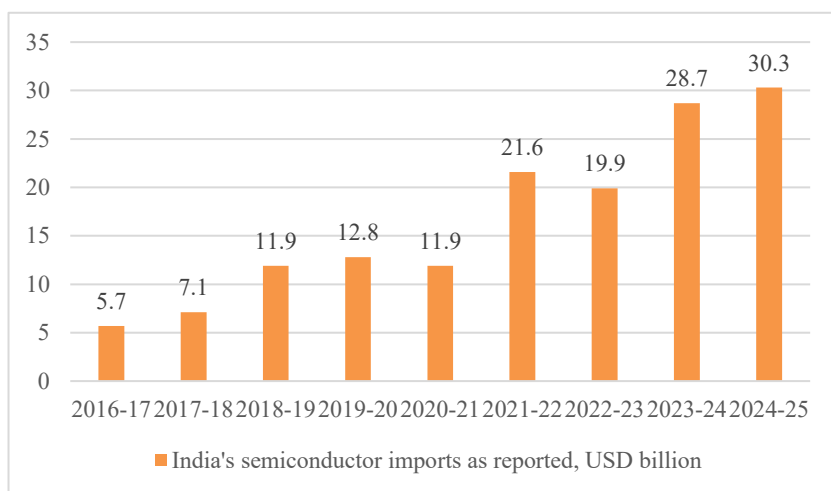
Source: SIA 2025 Factbook.

Further, consumer electronics, automotive and industrial applications accounted for 61% of India's estimated semiconductor demand in the EY-IESA end-use series for 2025.



Source: EY-IESA, September 2026.

Additionally, India's imports under HS headings 8541 and 8542 increased from USD 5.7 billion in FY2016-17 to USD 30.3 billion in FY2024-25. NITI Aayog reports cumulative imports of almost USD 150 billion and a CAGR of 23% over this period. This continuation-of-growth scenario places annual imports at USD 240 billion by 2035.



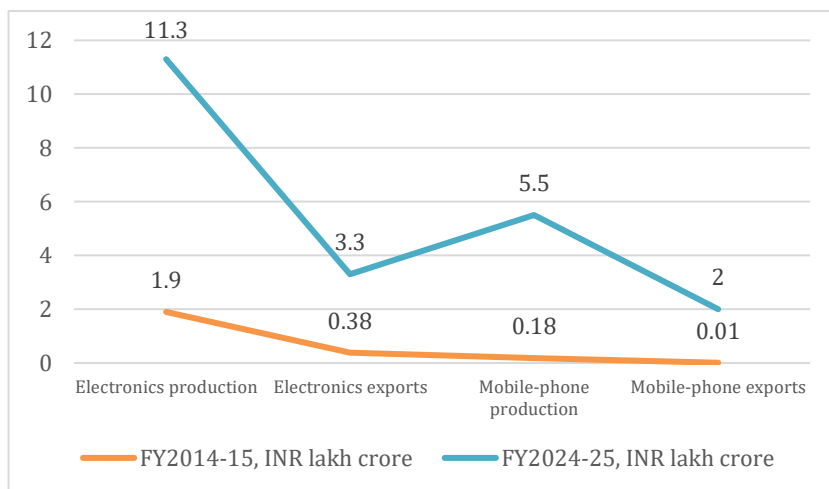
Source: NITI Aayog, *Future of India's Semiconductor Industry*, May 2026.

Worldwide semiconductor-equipment billings reached USD 135.1 billion in 2025, with China, Taiwan and South Korea as the three largest regional markets.

Geography	Semiconductor equipment billings in 2025, USD billion
China	49.3
Taiwan	31.5
South Korea	25.8
North America	10.9
Japan	9.5
Europe	2.9
Rest of world	5.2
Worldwide total	135.1

Source: SEMI, April 2026

The electronics production in India reached INR 11.3 lakh crore and electronics exports reached INR 3.3 lakh crore in FY2024-25.



Source: MeitY Parliamentary Response Published by PIB, February 6, 2026.

2.4 Applications and semiconductor requirements

Application	Principal semiconductor requirements
Consumer electronics and communications	Processors, memory, connectivity chips, sensors and power management; radio-frequency devices, baseband processing and optical interfaces for telecom networks.
Automotive and electric mobility	Microcontrollers, sensors, analogue circuits and power devices for propulsion, battery management, safety, connectivity and charging.
Industrial electronics and energy	Motor control, automation, measurement and power conversion; silicon carbide and gallium nitride devices for selected power applications.
Healthcare and medical electronics	Precision analogue circuits, low-power sensors, data converters and signal processors, with application-specific accuracy, isolation and reliability requirements.
Data centres and AI	Processors, memory, high-speed interfaces, power delivery and advanced packaging; integration with interconnects, cooling and supporting software.

Semiconductor requirements differ within each application. Industrial and medical customers can require extended product availability, reliability evidence and application support. Advanced computing depends on the interaction of the chip, package, memory and software, creating demand for specialist engineering and reusable IP as well as complete devices.

**Key Takeaways
for Businesses
and Investors**

Market size, imports and domestic production measure different activities and should be assessed separately.

Demand extends beyond advanced logic to analogue, power, sensing, memory and connectivity devices.

Customer qualification, system compatibility and product life influence the commercial potential of semiconductor design.

3. SEMICONDUCTOR INDUSTRY IN INDIA

India's semiconductor industry comprises multinational design centres, Indian engineering-services companies, domestic fabless businesses and manufacturing units engaged in fabrication, assembly, packaging and testing.

The country's share of the global semiconductor design workforce has been placed at approximately 20%. Manufacturing is developing through projects in silicon fabrication, compound semiconductors, display-related technologies and packaging, supported by the India Semiconductor Mission and state policies.

The domestic industry serves electronics applications ranging from consumer devices and communications to automotive, industrial and power systems. Its activities include developing chips, providing engineering services, producing semiconductor devices and supplying the materials, equipment and infrastructure used in production. These activities are organised through distinct business models, which determine whether a company earns revenue from product sales, manufacturing, engineering or technology licensing.

3.1 Industry Structure and Business Models

Business Model	Activity and Commercial Role
Integrated device manufacturer	Designs and manufactures devices within the same group; selected activities may be outsourced.
Fabless product company	Develops and sells chips using external fabrication and packaging capacity; retains responsibility for the product and its customers.
Foundry	Manufactures wafers for customers using specified process technologies and associated process design kits.
OSAT and ATMP	Provides assembly, packaging and testing. ATMP denotes assembly, testing, marking and packaging in Indian policy usage.
Design services and captive centres	Provides engineering under customer contracts or for group companies, including verification, physical design and custom layout.
Reusable IP business	Licenses processor cores, interfaces or other design blocks, with licence fees and royalties as agreed.

3.2 From Chip Design to Production

Stage	Main Activity
1. Specification and architecture	Define functions, performance, interfaces and manufacturing requirements.
2. Design and verification	Implement circuits and physical layout using EDA tools and the foundry's process design kit.
3. Fabrication	Form devices and interconnections on wafers using the selected process technology.
4. Packaging and testing	Separate and package dies, provide electrical and thermal connections, and assess the finished device against its specification.

Different applications use different production technologies. Established processes serve many analogue, mixed-signal, power-management, industrial and automotive products, and advanced logic processes support demanding computing applications. Silicon carbide and gallium nitride address power, radio-frequency and optical functions, creating separate requirements for materials, equipment and packaging.

3.3 Manufacturing Projects in India

The government's update of September 17, 2026 records 12 approved semiconductor manufacturing projects across Gujarat, Assam, Uttar Pradesh, Odisha, Punjab and Andhra Pradesh, with proposed investment exceeding INR 1.64 lakh crore. 5 facilities had commenced commercial production. The approved portfolio comprised one silicon fab, one silicon carbide fab, one integrated GaN micro-LED display fab and nine ATMP/OSAT units.

Project and location	Activity	Investment (INR crore)
Micron; Sanand, Gujarat	Memory assembly and test	22,516
Tata Electronics, with PSMC technology partnership; Dholera, Gujarat	Silicon wafer fabrication	Approximately 91,000
CG Power, Renesas and Stars Microelectronics; Sanand, Gujarat	Assembly and test	Approximately 7,600
Tata Semiconductor Assembly and Test; Morigaon, Assam	Assembly and test	Approximately 27,000
Kaynes Semicon; Sanand, Gujarat	Assembly and test	3,307
HCL-Foxconn joint venture; Jewar, Uttar Pradesh	Display-driver chip packaging and related operations	Approximately 3,700
SiCSem; Odisha	Silicon carbide fabrication and packaging	2,066
3D Glass Solutions; Odisha	Advanced packaging and glass substrates	1,943
Continental Device India; Mohali, Punjab	Discrete semiconductor expansion	117

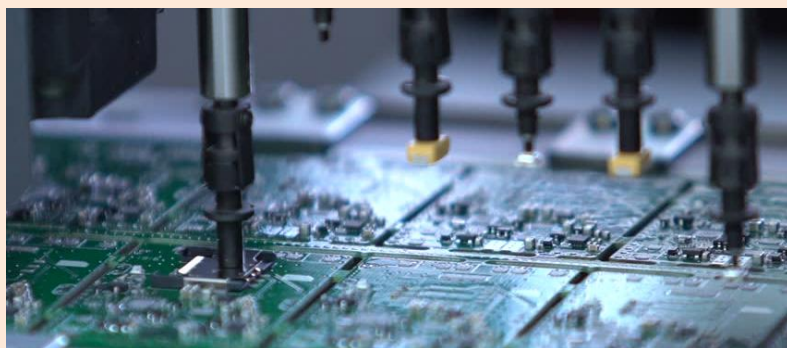
Advanced System in Package Technologies; Andhra Pradesh	Packaging	468
Crystal Matrix; Dholera, Gujarat	Integrated GaN mini/micro-LED fabrication and packaging	Part of combined 3,936 for the two May 2026 approvals
Suchi Semicon; Surat, Gujarat	OSAT for discrete devices	Part of combined 3,936 for the two May 2026 approvals

Key Takeaways for Businesses and Investors

Approved projects, construction activity, commercial production and capacity utilisation represent different stages of development.

Design-service revenue differs from ownership of a chip product or reusable IP that can be sold or licensed.

Manufacturing growth also creates requirements for testing, materials, utilities, maintenance and specialist engineering.



4. CHALLENGES AND OPPORTUNITIES

India's opportunities in semiconductors are linked to its design workforce, domestic electronics demand and the manufacturing capacity being established under approved projects.

Design ownership, mature-node devices, compound semiconductors, advanced packaging and specialist materials are considered among the areas for development. However, barriers include capital, technology, talent, resources, customer acceptance and development time.

4.1 Participation across the value chain

Area	Opportunity and Principal Requirements
Design and reusable IP	Circuit design, verification, physical implementation and licensable blocks; access to tools, licensed technology, prototypes and validation is material to cost.
Specialised devices	Mature-node, analogue, mixed-signal, power and compound semiconductor products; process selection and customer qualification depend on the application.
Packaging and testing	Substrates, interconnects, multi-die integration, thermal management, characterisation and reliability services.
Materials and equipment	High-purity chemicals and gases, equipment components, precision engineering and maintenance; inputs require semiconductor-grade consistency and qualification.

Indian design projects supported by the earlier DLI scheme cover satellite communications, drones, surveillance, smart meters, IoT, LED drivers, AI systems and telecommunications. Reusable processors, interfaces and other IP blocks provide a separate licensing market. These segments connect design activity with identifiable products and customer requirements.

4.2 Development Costs, Infrastructure and Qualification

Manufacturing investment includes facilities, equipment, and technology transfer prior to process qualification and production ramp-up. Fabless development involves spending on engineers, tools, licensed technology, prototypes, and testing before reaching commercial sales, and design revisions may lead to additional fabrication runs. The time to revenue is also influenced by customer qualification, which assesses the device against electrical, reliability, and application standards.

Fabs and packaging facilities require power, water, gas, and chemical systems suited to the process, along with contamination control, waste management, and skilled operators. Production costs depend on yield, packaging, testing, and supply stability. These factors highlight the importance of manufacturing infrastructure, workforce development and supplier relationships, complemented by capital incentives in India's semiconductor policy.

Key Takeaways for Businesses and Investors

Capital assistance addresses only part of a project's funding needs; design iterations, qualification and production ramp-up also require resources.

Supplier opportunities depend on meeting process, purity and reliability specifications.

Customer adoption and access to production technology are material considerations alongside demand forecasts.



5. GOVERNMENT INITIATIVES AND CENTRAL INCENTIVES

India's central support framework covers semiconductor and display manufacturing, design, equipment, materials, electronics components and shared infrastructure.

Assistance takes the form of contributions to eligible project costs or capital expenditure, development funding and incentives linked to deployment or sales. The principal schemes and their published eligibility and assistance provisions are set out below.

5.1 The Original Semiconductor and Display Programme

Approved in December 2021 with an outlay of INR 76,000 crore, the original programme provided support for semiconductor and display manufacturing together with domestic chip design. The September 2022 modification established fiscal support of 50% of project cost for semiconductor fabs across technology nodes and for display fabs. Assistance for compound semiconductors, silicon photonics, sensors, discrete semiconductors and ATMP/OSAT facilities was set at 50% of capital expenditure.

5.2 Semicon 2.0

Semicon 2.0 carries a fiscal outlay of INR 1,27,500 crore and covers six pillars: design, machines and materials, fabs, ATMP/OSAT, research and development, and talent development. Notifications for these pillars were announced on August 31, 2026, and the ISM portal lists implementation guidelines dated September 16, 2026 for machines and materials, fabs and ATMP/OSAT.

Semicon 2.0 category	Headline fiscal support	Important qualification
Silicon semiconductor fabs	40% of eligible capital expenditure	Technical, capacity, investment and revenue thresholds apply
Compound semiconductors, silicon photonics, sensors and discrete semiconductor fabs	35% of eligible capital expenditure	Category-specific technology and capacity conditions apply
Display fabs	35% of eligible capital expenditure	Separate requirements for OLED, LCD and micro-LED
Advanced ATMP/OSAT	35% of eligible capital expenditure	Eligibility follows the advanced packaging category
Legacy ATMP/OSAT	25% of eligible capital expenditure	Different rate from advanced packaging
Eligible machines and materials activities	30% of eligible capital expenditure	Activity-specific investment and revenue thresholds
Eligible semiconductor R&D projects	Up to 75% of project cost	Includes state support; approved capital and operating expenditure
Eligible talent-development projects	Up to 75% of project cost	Includes state support; institution and project conditions

5.3 Manufacturing Eligibility and Investment Thresholds

Fab categories carry minimum investment, revenue, capacity and technology requirements. The published thresholds are set out below; revenue eligibility follows the prescribed applicant, group-company or joint-venture basis and qualifying financial years.

Fab Category	Minimum Investment/Revenue (INR crore)	Capacity and Wafer/Panel Requirement
Silicon	20,000 / 7500	40,000 wafer starts per month; 300 mm wafers
Compound semiconductors, sensors, photonics and discrete devices	500 / 200	500 wafer starts per month; 200 mm for sensors/MEMS, 150 mm for compound/discrete and 100 mm for photonics
OLED display	10,000 / 5000	Generation 6 or above; 30,000 panels per month
LCD display	10,000 / 5000	Generation 8 or above; 60,000 panels per month
Micro-LED display	1500 / 600	Panel area of 500 square centimetres per month

ATMP/OSAT categories specify a minimum capital investment of INR 1000 crore and revenue of INR 200 crore. Access to production-grade technology is an eligibility condition under the relevant manufacturing scheme.

5.4 Machines, materials and equipment support

The machines and materials pillar covers semiconductor manufacturing equipment, raw materials, testing and characterisation, and specified refurbishment, assembly and equipment-component activities. The published capital assistance is 30% of eligible expenditure, with activity-specific investment and revenue requirements.

Machines and Materials Activity	Minimum Investment (INR crore)	Capital (INR crore)	Revenue Threshold (INR crore)
R&D for semiconductor manufacturing equipment	300		120
Semiconductor raw materials	50		20
Testing and characterisation facilities	100		40
Equipment manufacturing, refurbishment, assembly and specified components	300		120

The equipment-related production incentive uses rates of 10%, 8%, 6%, 4% and 2% over five years from FY2028-29 on the prescribed domestically sourced bill of materials, subject to the published ceiling and conditions. The framework states an overall ceiling of 50% of capital expenditure for the equipment-related incentive. Technology ownership or licensing is prescribed for applicable activities, with testing and characterisation treated separately.

5.5 Electronics Component Manufacturing Scheme

The Electronics Component Manufacturing Scheme, or ECMS, was notified in April 2025 with an original outlay of INR 22,919 crore, subsequently enhanced to INR 40,000 crore in the Union Budget 2026-27. It has a six-year tenure with an optional one-year gestation period and covers specified subassemblies, bare components, advanced printed circuit boards, passive components and capital goods. Assistance is linked to turnover, capital expenditure or both, according to the product category.

For the supply-chain ecosystem and capital-equipment category, the launch framework specifies minimum investment of INR 10 crore and a capital-expenditure incentive of 25%. The application window for this category was set at two years from May 1, 2025. The official portal records closure of applications for categories A, B, C and E on September 30, 2025, with

subsequent notifications governing amendments and application arrangements.

5.6 Manufacturing Clusters and the Earlier SPECS Scheme

The Modified Electronics Manufacturing Clusters scheme, EMC 2.0, finances infrastructure developed through a project implementing agency. Assistance for an approved electronics manufacturing cluster is up to 50% of project cost, subject to INR 70 crore per 100 acres and an overall ceiling of INR 350 crore. Common facility centres can receive up to 75% of project cost, capped at INR 75 crore. The implementing agency develops the approved facilities, and businesses occupy the site under the applicable allotment or lease arrangements. The earlier Scheme for Promotion of Manufacturing of Electronic Components and Semiconductors, SPECS, offered an incentive of 25% of eligible capital expenditure for specified activities. Its new-application window closed on March 31, 2024, although implementation and claims for approved beneficiaries continue under their sanctions. SPECS therefore remains relevant to existing approved projects rather than as an open route for new applications.

5.7 Application, Appraisal, Approval and Disbursement

Stage	Information or Decision
Application	Submit the project report, technology and financing arrangements, eligibility documents and prescribed fee through the designated route during the applicable window.
Appraisal	Technical and financial review of the activity, capacity, technology access, eligible investment and implementation plan.
Approval	Sanction and agreement establish recognised expenditure, assistance, milestones, reporting and conditions for project changes.
Disbursement	Submit expenditure or milestone evidence and claims in accordance with the sanction and scheme requirements.

5.8 Budget Allocations and Related Programmes

The following table identifies the principal programme outlays and FY2026-27 provisions.

Programme	Amount (INR crore)	Budget or Programme Basis
Original semiconductor and display programme	76,000	Programme outlay approved in 2021
Semicon 2.0	1,27,500	Next-phase programme outlay approved in 2026
Modified semiconductor and display programme	8,000	FY2026-27 budget allocation
India Semiconductor Mission 2.0	1,000	Initial FY2026-27 budget provision announced in February 2026
ECMS	40,000	Enhanced scheme outlay announced in Budget 2026-27
PLI for IT Hardware 2.0	17,000	Six-year scheme outlay
Chips to Startup	250	Five-year programme outlay
Research, Development and Innovation fund	1,00,000	Six-year fund corpus across eligible research sectors

The PLI Scheme 2.0 for IT Hardware covers laptops, tablets, all-in-one PCs, servers and ultra-small form-factor devices over six years. It links assistance to incremental sales and investment thresholds and promotes localisation, including semiconductor design, IC manufacturing and packaging within the stated framework. The scheme supports the downstream electronics market served by semiconductor suppliers.

Key Takeaways for Businesses and Investors

Identify the applicable programme phase and project category before comparing support rates.

Eligibility thresholds, expenditure definitions and approval conditions determine the assistance available to an individual project.

Sanctioned support and cash disbursement are distinct stages; project financing must account for the claim and payment schedule.

6. DESIGN STARTUPS AND TECHNOLOGY DEVELOPMENT SUPPORT

Semiconductor design support addresses expenditure on development, EDA tools, licensed IP, prototypes and validation, together with incentives for deploying eligible products. Semicon 2.0 and the earlier DLI scheme provide sector-specific routes, supplemented by startup recognition, research financing, defence innovation and IP reimbursement programmes.

6.1 Design Support Under Semicon 2.0

The strategic-design category covers IP, chips, systems-on-chips and modules identified for national importance or strategic priorities. Applicants must meet the specified Indian incorporation, headquarters, operational presence and ownership and control requirements, and may participate independently or through a consortium. The resulting IP is co-owned with C-DAC, whose commercial use is restricted for as long as the applicant fulfils its contractual obligations. The company also undertakes long-term support and complies with the stated security and export-control conditions.

The commercial-design category permits the prescribed Indian citizen or OCI ownership and control and requires Indian incorporation, headquarters and operational presence. IP rights and associated design and development files are required to remain in India. The published financial support comprises the following provisions.

Commercial Design Support	Principal Terms in the Source Framework
Seed funding	For eligible startups and MSMEs: lower of 50% of project cost or INR 15 crore per application, linked to milestones.
Equity or royalty financing	Co-investment follows the applicable investor terms. The royalty route for eligible companies specifies 5% of net product or technology revenues until recovery of 1.5 times assistance.
Deployment incentive	9% of qualifying net sales over five years, capped at INR 30 crore per application and INR 120 crore per company including group companies; first-launch and no-prior-sales conditions apply.
Shared infrastructure	EDA tools, multi-project wafer access, IP cores and post-silicon validation under the relevant access terms.

Exit from seed or equity support requires the higher of seed assistance plus the prevailing market value of government-held equity, or 1.5 times total seed and equity support. Royalty-financing exit requires 1.5 times the support within 4 years of the last disbursement and twice the support after that period.

6.2 Earlier DLI Support and Startup Programmes

The earlier Design Linked Incentive scheme combines shared design infrastructure with product-design and deployment incentives. Its product-design component provides reimbursement of up to 50% of eligible expenditure, capped at INR 15 crore per application, and the deployment component uses rates declining from 6% to 4% of net sales over five years, subject to a ceiling of INR 30 crore. The July 2026 government update recorded 24 approved design projects and EDA access for 105 startups and MSMEs. A September update placed the value of the 24 approved projects at approximately INR 900 crore. Applications represented in the supported projects include satellite communications, drones, surveillance cameras, IoT devices, LED drivers, AI systems, telecommunications and smart meters.

The February 2026 DPIIT framework retains a ten-year period for standard startup recognition with an INR 200 crore turnover threshold, and provides a deep-tech category with a twenty-year period and INR 300 crore threshold, subject to its conditions. ChipIN, C2S and Karnataka's Semiconductor Future Accelerator Lab provide infrastructure or acceleration support through their participation arrangements.

The Startup India Seed Fund Scheme portal's final extended notice set May 31, 2026 as the startup application deadline. The identified SIPP extension

covered April 1, 2023 to March 31, 2026. Patent-fee concessions and expedited examination separately operate under the Patents Rules for qualifying applicants.

6.3 Research and Defence Innovation Funding

The Research, Development and Innovation fund was launched on 3 November 2025 with a stated corpus of INR 1 lakh crore over 6 years, targeting eligible private-sector R&D, critical-technology acquisition and deep-tech financing. Under TDB's published route, assistance ordinarily covers up to 50% of assessed project cost; indicated loan terms are 3-4% interest and twelve to 15 years, subject to assessment. That route excludes grants and short-term loans.

For defence-related development, iDEX supports projects addressing the relevant challenge statement. The published framework identifies up to INR 1.5 crore under DISC and Open Challenge and up to INR 25 crore under ADITI, with a stated minimum applicant contribution of 50% of the product-development budget. Evaluation and award are followed by milestone-based development and grant disbursement, and IP is retained by the winner subject to the SPARK agreement. However, funding would not itself constitute a procurement award.

6.4 MSME Patent Reimbursement

The IPR component of MSME Innovative reimburses eligible patent-registration expenditure up to INR 1 lakh for an Indian patent and INR 5 lakh for a foreign patent. The published provisions cover specified official and professional costs for searching, drafting, filing and prosecution, supported by invoices and payment records. Applications are administered through the MSME IPR portal, and expenditure already claimed under another central scheme is excluded from the one-time assistance.

Key Takeaways for Businesses and Investors

Startup recognition and eligibility for a particular grant, investment or deployment incentive are separate assessments. Public support can carry ownership, IP-location, revenue-sharing and exit obligations.

The status of application windows and scheme extensions must be distinguished from continuing benefits under the Patents Rules.

7. STATE POLICIES AND INVESTMENT INCENTIVES

Dedicated state policies supplement central support through capital assistance, land and utility benefits, training and specified research or IP measures. Several states calculate capital support as a percentage of Government of India assistance, and additional benefits are governed by their own expenditure bases and ceilings. The following provisions cover selected published state frameworks.

7.1 Gujarat

Gujarat's Semiconductor Policy 2022-27 provides eligible projects with state capital assistance equal to 40% of the capital assistance approved by the Government of India. The disbursement schedule comprises five equal annual instalments beginning in the year after investment. The policy also provides land, utility and transaction-cost support:

Benefits	Provisions
Land subsidy	75% for the first 200 acres for a fab; 50% for additional land and other eligible ISM-approved projects, subject to policy categories
Location basis for land support	Government-agency allotments in Dholera SIR; other locations at state discretion; private purchases are outside this land-subsidy provision
Stamp duty and registration	One-time 100% reimbursement under the policy conditions
Power	INR 2 per unit subsidy for ten years; electricity-duty exemption under the applicable legislation
Water	INR 12 per cubic metre for five years, followed by 10% annual increases for the next five years
Desalination facility	50% of project cost excluding land, with eligible project cost capped at INR 8 crore per million litres per day

The land subsidy applies to qualifying government-agency allotments in Dholera SIR, with other locations subject to state discretion. Design Linked

Incentive projects are excluded from this dedicated manufacturing policy and are addressed through other applicable state frameworks.

7.2 Tamil Nadu

Tamil Nadu's Semiconductor and Advanced Electronics Policy 2024 provides semiconductor capital assistance up to 50% of the Government of India capital assistance for qualifying projects. It also includes training support of INR 10,000 per person per month for twelve months for eligible Tamil Nadu residents employed in the specified technical and operational roles. Prototype support is calculated at 25% of eligible capital expenditure, capped at INR 1 crore. Quality certification and in-house IP assistance each use a 50% reimbursement basis and an INR 1 crore ceiling, subject to their policy conditions. The policy separately defines semiconductor and advanced-electronics projects, with the latter category carrying its own investment, employment and value-addition requirements.

7.3 Uttar Pradesh

Uttar Pradesh's Semiconductor Policy 2024 provides capital support equal to 50% of Government of India-approved capital assistance. The state's published resources also identify interest assistance, land benefits, electricity-duty relief and support for R&D or centres of excellence, governed by the respective conditions and ceilings. The policy is administered together with its subsequent government orders and project approvals. The official resource page includes a February 2026 order addressing related-party transactions, which forms part of the policy's implementation material.

7.4 Assam

The Assam Electronics (Semiconductor etc.) Policy 2023 provides eligible centrally approved projects with capital assistance equal to 40% of Government of India assistance. Its normal disbursement schedule comprises five annual instalments of 20% each across two construction years and three production years, subject to the variation permitted under the policy. The policy operates for five years from notification or until a new or revised policy takes effect, whichever is earlier.

Benefits	Provisions
Land	Nominal pricing and freehold transfer on a case-by-case basis
Stamp duty	100% exemption for eligible government/development-authority land or built-up-space allotments
Power tariff	Up to 50% support for ten years from commercial operations, disbursed annually
Water	INR 5 per cubic metre for the first ten years; further tariff subsidy at state discretion
SGST	Case-specific reimbursement for up to fifteen years
Local employment	Discretionary payroll assistance of 20% of net wages of local employees

Source: Assam Electronics (Semiconductor etc.) Policy 2023

7.5 Other States

Andhra Pradesh's Semiconductor and Display Fab Policy 4.0, 2024-29, provides assistance equal to 60% of the Government of India incentive for the relevant centrally supported project category, capped at 30% of approved project cost. The policy contains separate project categories and provisions for larger investments, with the recognised category determining the applicable assistance.

Odisha's Semiconductor Manufacturing and Fabless Policy 2023 covers manufacturing and fabless activity and has been amended, including through the second amendment published in July 2025. Madhya Pradesh's investment authority lists its Semiconductor Policy 2025, and Rajasthan's official investment portal lists the Semiconductor Policy 2026. These instruments form part of the wider state-level framework for semiconductor investment.

Karnataka's Semiconductor Future Accelerator Lab Foundation supports the fabless ecosystem through technical facilities and acceleration services. Its activities address design and startup development and operate through the programme's participation conditions.

State benefits are administered through relevant policies and sanctions, which prescribe the application, commencement, recognised expenditure, and claim provisions. Capital assistance, land allotment and utility benefits also involve separate approval and disbursement processes.

**Key Takeaways
for Businesses
and Investors**

State assistance, land allotment and utility benefits may involve separate approvals.

Location decisions also depend on infrastructure, skilled personnel, suppliers and customer requirements.



8. RESEARCH INFRASTRUCTURE AND SKILL DEVELOPMENT

India's semiconductor training and prototyping infrastructure includes Chips to Startup, C-DAC's ChipIN Centre, the Semi-Conductor Laboratory at Mohali and participating academic institutions.

These programmes provide design tools, fabrication access, validation and training, complemented by the R&D and talent-development pillars of Semicon 2.0.

8.1 Chips to Startup and ChipIN

Launched in 2022 with an outlay of INR 250 crore over five years, C2S targets development of 85,000 industry-ready professionals through academic design projects and shared infrastructure. The government's reported programme outcomes and wider ecosystem access figures are set out below.

Programme Outcome	Reported Figure	Reporting Period and Source
Academic institutions with EDA tools under C2S	320	August 2026 update
Students trained	More than 68,000	August 2026 update
Chip tape-outs	211 from 75 institutions	By April 2026, reported in August
Engineers provided access to advanced design tools across the wider ecosystem	More than 100,000	September 2026 update
Organisations covered by the wider design-tool access programme	500, including 400 academic institutions and 100 startups	September 2026 update

**Chip designs developed
across these
organisations**

More than 300

September 2026 update

C2S project submissions address specifications, novelty, technology readiness, fabrication, testing, milestones and commercialisation, with collaborative proposals identifying responsibilities, budgets and IP arrangements. Tool access follows the programme process and vendor licences. ChipIN coordinates design submission, verification and aggregation for shared fabrication at SCL Mohali using 180 nm technology. Approved designs are fabricated and packaged, then returned to participating institutions for testing.

8.2 Semiconductor Research and Talent Funding

Semicon 2.0 R&D support covers advanced CMOS, photonics, displays, chiplets and other approved semiconductor research, undertaken by companies independently or with academic and research organisations. Assistance can cover eligible capital and operating expenditure up to 75% of project cost inclusive of state support, with project duration preferably up to 6 years.

Talent-development support covers eligible institutions, laboratories, scientific societies and domestic training organisations. It includes EDA and prototyping access, validation, hands-on manufacturing training and nanofabrication laboratories, with assistance up to 75% of approved capital and operating expenditure inclusive of state support.

Key Takeaways for Businesses and Investors

Shared tools and prototyping reduce access barriers, but participation and use remain subject to programme and vendor terms.

Research collaborations need agreed responsibilities for background technology, new IP, publication and commercial use.

Training and tool-access statistics should retain their programme scope and reporting date.

9. INVESTMENT AND REGULATORY CONSIDERATIONS

Semiconductor projects are subject to Indian investment, environmental, workforce and trade requirements alongside incentive eligibility.

Manufacturing permissions depend on the site and production process, and cross-border investment or technology arrangements are governed by the provisions applicable to the transaction and its participants.

9.1 Foreign Investment and Operating Permissions

Electronics manufacturing is eligible for 100% FDI under the automatic route, subject to applicable conditions, including restrictions and reporting relating to investor nationality and beneficial ownership. The 2026 land-border framework includes the Non-Debt Instruments Rules amendment of May 1, 2026. Scheme-specific ownership and control conditions also apply to publicly supported businesses, including the Semicon 2.0 design categories.

Manufacturing may require consent to establish, consent to operate, and hazardous-waste authorisation, along with applicable requirements for chemicals, gas systems, fire safety, and water and effluent treatment. Workforce obligations arise under the labour-code framework, whose commencement was announced for November 21, 2025, and the relevant rules, state provisions and transitional arrangements.

9.2 Trade Controls and Customs

India's SCOMET framework regulates listed dual-use goods and technologies according to classification, destination, end use and authorisation requirements. The 2025 list took effect on October 23, 2025 and may cover specified semiconductor equipment, software and technical information, including transfers within cross-border development arrangements. Foreign-origin technology can also carry restrictions under its originating jurisdiction and licence.

Customs classification and exemptions depend on the goods and notified conditions, including whether the import concerns wafers, devices, machinery, parts or materials. Incentive approval for a semiconductor project does not itself establish an exemption for every import.

10. PATENT PROTECTION AND FILING

The Patents Act, 1970 and Patents Rules, 2003 govern protection of semiconductor inventions in India.

Eligible subject matter can include device structures, materials, fabrication processes, packaging, interconnections and testing technologies, provided the invention meets novelty, inventive step, industrial applicability and disclosure requirements.

Section 3(k) excludes computer programmes per se and other specified subject matter; section 3(o) excludes integrated-circuit topography, which falls under the layout-design legislation.

10.1 Filing and Examination

An application may be filed by the inventor, assignee or another person entitled under the Act, with the specification disclosing the invention and claims defining the protection sought. A provisional filing must be followed by the complete specification within twelve months.

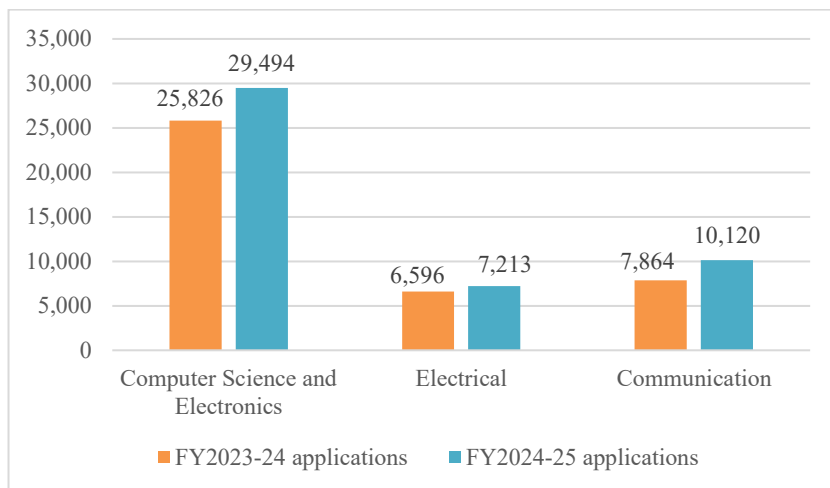
Public disclosure can affect novelty subject to the statutory exceptions, and the 2025 Computer Related Inventions Guidelines address examination of relevant computer-implemented claims within the Act and Rules. Section 39 generally requires a person resident in India to obtain permission before causing an application to be filed abroad unless an Indian application was filed at least six weeks earlier and the applicable secrecy-direction conditions are satisfied. The provision is relevant to cross-border semiconductor development involving Indian-resident inventors and overseas applicants.

Procedure	Applicable Position
Request for examination	Generally, 31 months from priority or filing, whichever is earlier, under the amended rule; the earlier 48-month period is preserved for applications filed before commencement of the March 15, 2024 amendment.
Foreign-application information	Form 3 under rule 12; initial filing normally within 6 months, with the amended update linked to the first statement of objections and further Controller directions.
Response to examination objections	The rule 24B period for putting the application in order is 6 months, with the prescribed extension mechanism.
Working statement	Form 27 for each three-year financial-year period beginning with the financial year after grant; generally due within 6 months after that period.
Expedited examination	Available only to qualifying categories under rule 24C
Patent term	Twenty years from filing; for PCT national-phase patents, measured from the international filing date.

Rule 12 provides for the foreign-application update within three months of the first statement of objections and further information when directed by the Controller. Form 27 extensions or condonation operate through the prescribed Form 4 mechanism under Rule 131.

10.2 Patent Rights and Filing Statistics

The claims granted determine the protection for a product or process, and rights remain territorial. A chip can embody several patented technologies, so ownership of a patent for one feature does not resolve access to other protected features used in the same product. CGPDTM's Annual Report 2024-25 provides the following figures for broad technical fields relevant to electronics:



Source: CGPDTM Annual Report 2024-25

10.3 Patent Searches and Freedom to Operate

Patent landscape searches organise published patent information by technology, applicant, jurisdiction and filing period to support an understanding of research and filing activity. A semiconductor landscape requires a defined search strategy, relevant classifications and keywords, and review of the resulting patent families; broad annual filing totals cannot substitute for that analysis.

Freedom-to-operate analysis examines potentially relevant third-party patent claims in the jurisdictions where specified activities are planned. Its scope depends on the product or process, territory and date of assessment. Patentability, ownership of a granted patent and freedom to operate are separate questions.

**Key Takeaways
for Businesses
and Investors**

Patent claims determine the protected invention; protection remains territorial.

Filing strategy must address disclosure timing, entitlement and foreign-filing requirements for Indian residents.

Patent ownership does not by itself establish freedom to manufacture or sell a product incorporating third-party technology.

11. PROTECTION OF INTEGRATED CIRCUIT LAYOUT DESIGNS

The Semiconductor Integrated Circuits Layout-Design Act, 2000 provides registration-based protection for the physical arrangement of elements and interconnections in a qualifying integrated circuit. It protects the layout as defined under that statute, separately from a patent directed to an invention in the device or manufacturing process.

11.1 Eligibility, Registration and Protection

Registrability depends on originality, distinctiveness and the statutory treatment of commercial exploitation. Originality relates to the creator's intellectual effort and the absence of commonplace character among layout creators and manufacturers; a combination of commonplace elements can qualify if the combination meets the statutory standard. Section 7 addresses prior exploitation and the two-year period relevant to filing.

The Registry's guidance identifies Form LD-1, an application fee of INR 5,000, and prescribed representations and supporting particulars. Examination is followed by acceptance, advertisement, opposition where filed and registration. The opposition period is three months from

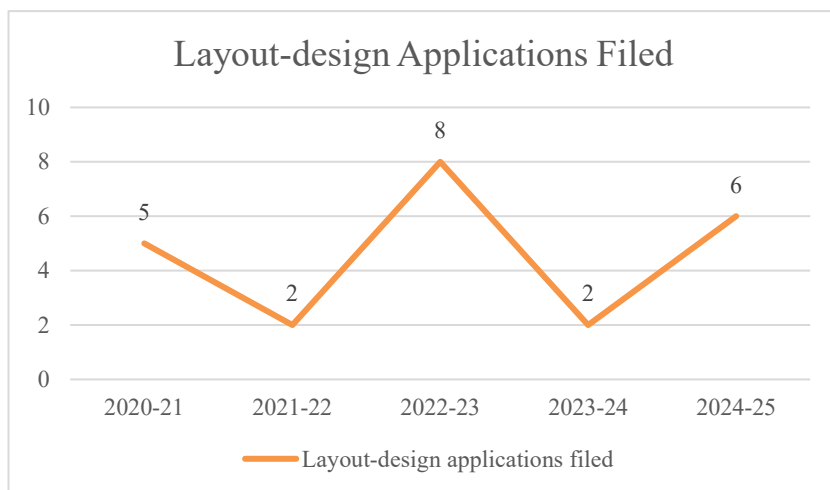
advertisement, and the applicant has two months to submit a counterstatement after receiving the opposition.

Protection runs for 10 years from filing or first commercial exploitation in India or another country, whichever is earlier. The rights address unauthorised reproduction and specified commercial dealings, subject to exceptions including evaluation, analysis, research and teaching. The Act also addresses innocent acquisition of unlawfully reproduced layouts and subsequent dealings after notice.

Ownership provisions address layouts created in employment or under a commission, subject to agreement to the contrary. These rules are relevant to outsourced layout work, together with contractual rights in supporting tools, customer information and third-party process material.

11.2 Indian Filing and Registration Statistics

The CGPDTM reported 6 layout-design applications received in FY2024-25, with preliminary scrutiny completed. Its five-year filing series is set out below.



As of March 31, 2025, the Registry had received 31 applications cumulatively and examined 15, of which 7 were registered and 8 were not accepted or abandoned. The 7 registrations comprised 6 layouts of Bharat Electronics Limited and one of ISRO.

**Key Takeaways
for Businesses
and Investors**

Layout-design registration protects qualifying integrated-circuit layouts separately from patents for inventions.

First commercial exploitation affects the filing position and calculation of the protection term.

Commissioned and collaborative layout work requires clear ownership arrangements and records of creation.

12. COPYRIGHT, TRADE SECRETS AND TECHNOLOGY OWNERSHIP

Semiconductor development produces software, verification code, documentation and confidential process information alongside inventions and circuit layouts.

Copyright can protect qualifying original expression in development materials under the Copyright Act, 1957, and confidentiality obligations govern protected non-public information such as process recipes, unreleased designs, test parameters and yield-improvement knowledge.

Ownership varies according to the type of asset and the employment, consultancy or research relationship in which it was created. Assignments and licences identify rights transferred or made available to the business; collaborative research arrangements also address pre-existing technology, new results, publication and commercial use. Public-funding conditions can add requirements on ownership or IP location, including those under Semicon 2.0.

Commercial and open-source components remain subject to their licenses, including permissions for modification and distribution and any attribution, source-code or patent provisions. Development records can provide evidence of authorship and independent creation, and confidentiality agreements establish permitted use and disclosure when designs are shared with employees, contractors, foundries and customers.

13. Semiconductor IP Licensing and Technology Transactions

Semiconductor technology is commercialised through product sales, IP licenses, design services, manufacturing and technology-transfer arrangements. A developer may license processor or interface IP, contract for engineering and use separate fabrication and packaging providers before supplying a chip. The agreements establish the rights and responsibilities associated with each contribution.

13.1 IP Licenses and Design Services

An IP license identifies the permitted products, users, processes, foundries and territories, together with modification, affiliate and sublicensing rights. Deliverables can include design files, verification models, documentation and integration support, with payment through fees, royalties or support charges. Evaluation access and commercial manufacturing rights are governed by their respective terms.

Design-services agreements define the commissioned work, inputs, tools, milestones and acceptance criteria. Their ownership provisions distinguish customer-specific output from the supplier's pre-existing tools and technology, and their scope determines any support after tape-out or during validation.

13.2 Manufacturing Transfer and Continuity

Foundry and packaging contracts address production specifications, capacity, materials, delivery, acceptance and defective output. Technology-transfer agreements may combine licenses with process documentation, training and technical assistance, including rights in improvements developed during implementation. Changes of ownership or technology transfers can be subject to contractual consent, export controls and public-funding conditions. These provisions determine continued access to licensed technology and approved support, including the exit terms for Semicon 2.0 design funding.

Patent rights and the scope of licenses remain relevant to manufacture and sale in each jurisdiction.

**Key Takeaways
for Businesses
and Investors**

Different rights can protect different aspects of the same semiconductor product.

Employment, consultancy and research agreements should identify existing technology and ownership of newly created work.

Third-party licences and confidentiality obligations continue to govern how development materials may be used and shared.

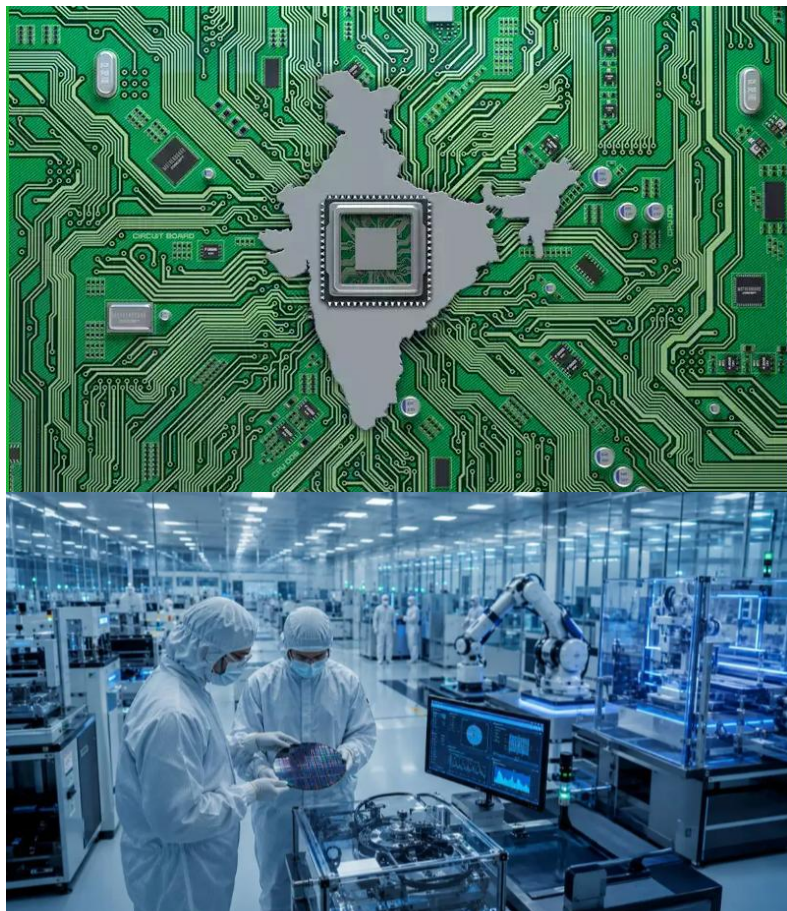
14. OPPORTUNITIES AHEAD

India's semiconductor sector combines a substantial engineering base with manufacturing investments across silicon, compound semiconductors and packaging. The twelve projects reported in September 2026 span six states and proposed investment exceeding INR 1.64 lakh crore, and five facilities had commenced commercial production.

These developments extend domestic participation from design into a wider range of production activities. The opportunities ahead include fabless products, reusable IP, design and layout services, power and industrial devices, advanced packaging, testing and qualified supplies of materials and equipment. Developing these capabilities requires commercial adoption, manufacturing skills, reliable infrastructure, and suppliers capable of meeting semiconductor specifications.

The policy framework now covers these stages through Semicon 2.0, the earlier semiconductor programme, ECMS, manufacturing clusters, design and research funding, skills programmes and state incentives. Patent and

layout-design protection, copyright, confidentiality and technology licences provide the legal framework for owning and commercialising the resulting technology. The sector's expansion therefore involves both new production capacity and the development of Indian products, IP and specialist suppliers. Its contribution to the wider electronics industry will be reflected in commercially deployed designs, qualified manufacturing output and the domestic capabilities supporting those activities.



HOW LEXORBIS CAN ASSIST

LexOrbis assists semiconductor businesses, investors and research institutions with the protection, assessment and commercial use of intellectual property across development, collaboration and transactions.

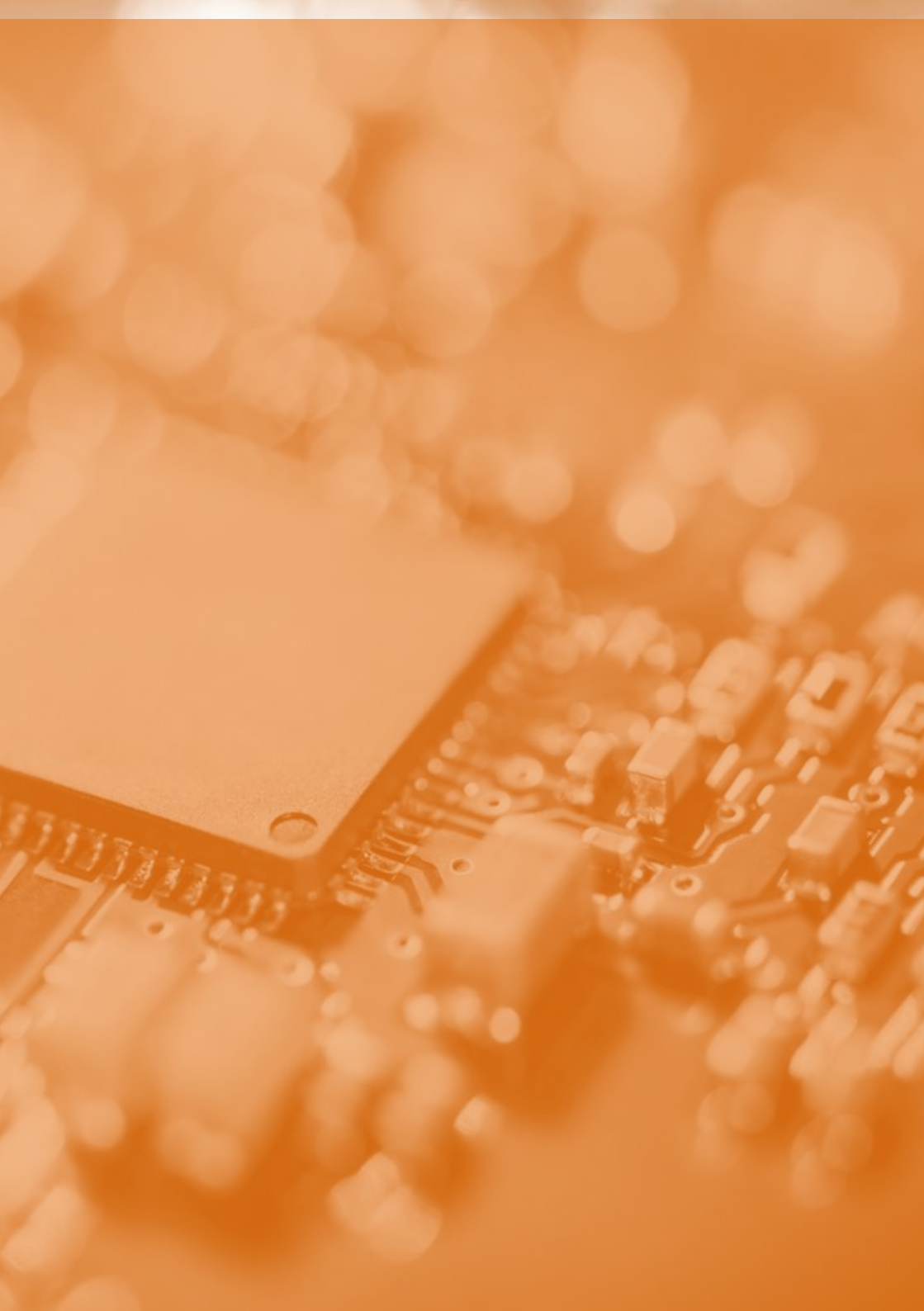
Patent strategy and prosecution	Identifying potentially patentable inventions, developing filing strategies, drafting and prosecuting applications, and coordinating protection in India and other jurisdictions.
FTO and landscape searches	Conducting freedom-to-operate and patent landscape searches to assess relevant patent activity, potentially material third-party rights and the scope for further analysis.
IP due diligence	Reviewing ownership, assignments, licences, portfolio status and contractual restrictions in investments, acquisitions and technology collaborations.
Technology licensing	Drafting and reviewing IP licences, development agreements and technology-transfer arrangements, including rights in improvements and permitted manufacturing use.
Trade secrets	Confidentiality agreements, ownership provisions and contractual measures for protecting non-public designs, process information and technical know-how.
Semiconductor layout-design protection	Advising on eligibility, ownership, filing and prosecution of applications for integrated circuit layout-design registration.

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