



The European Institute for the PCB Community

## **EIPC SPEeDNEWS**

*Issue 17— June 2020*

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### **NEWS FROM BELGIUM**

#### **Elsyca offers free white paper on how Plating Simulation Raises Yield and Profitability!**

Problems with non-uniformity in PCB copper pattern plating are typically described as “the FAB problem”.

But imagine how much time and money one could save when each player in the process (Design -> CAM -> Production) would be able to identify potential problems at an early stage.

What if the PCB pre-production engineer could upfront identify problem areas for the pattern plating and apply auto-intelligent copper balancing, as part of the CAM process to provide a right-first-time panel layout for production?

And what if the process engineer has a software that accurately predicts the impact of plating parameters on the layer thickness distribution to increase first pass yields on new PCB parts?

Download Elsyca’s new white paper to learn more about production-proofing PCB copper plating.

To download this paper, click [here](#).



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## NEWS FROM GERMANY



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Ihr Eugen G. Leuze Verlag

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We decided to support our subscribers during the next 3 months by offering our online access for free and without further obligations. This offer is for our subscribers and also for prospective customers.

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This can be sent by you or directly from the member to my mail address.

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***A very kind offer! Ed.***



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### NEWS FROM NORWAY

#### **Elmatica CEO to Serve as Vice Chair for New IPC Cyber Security Task Group**

**“The goal of the IPC 2-12c Cybersecurity Protection Standard Task Group is to develop a new industry standard to provide a system to reduce the manufacturing supply-chain cybersecurity risks. We are pleased to have Didrik Bech and his experience within cybersecurity on-board as Vice Chair,” says Chris Jorgensen, Director Technology Transfer at IPC.**

IPC-1792, *Standard for Cybersecurity Management in the Manufacturing Industry Supply Chain* is an open international standard, meaning that anyone from the electronics manufacturing industry with interest in the topic can join the task group. Anyone with interest in participating can contact Chris Jorgensen to be added to the task group or for more information.

#### **Task Group International Leadership**

The 2-12c Task Group leadership is a representation of IPC as an international standards body. The group is chaired by Toshiyuki Sawada of NEC Japan, and in addition to Didrik Bech, Kathleen Nargi-Toth with Bowhead USA also serves as co-vice chair.

“IPC is continuously providing important standards for the entire industry. Lately we have experienced a shift in knowledge and focus toward cybersecurity, driven forward by both new legislations in EU, Nationally and not at least by US DoD and the CMMC standard,” says Bech.

“I am looking forward to working closely with both IPC, the Task Group members and the industry, to ensure that IPC-1792 is set within the correct scope in a fast moving cyber landscape, make sure it will augment other cybersecurity standards and regulations, and be specific to our industry,” Bech concludes.

#### **Aim to reduce manufacturing supply-chain cybersecurity risks**

IPC-1792 cybersecurity standard is applicable for internal cybersecurity and external cybersecurity. It also includes mechanisms for self- or third-party assessment to the four cybersecurity models as well as a mechanism of validation by a certificate authority (CA).

The standard will provide a system for reducing manufacturing supply-chain cybersecurity risks.

Within this system, the standard will identify levels of cybersecurity protection which can be used to assess a manufacturing facility's cybersecurity model to show existing cybersecurity protections and to identify steps to take to achieve higher cybersecurity levels.

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**About Elmatica**

Elmatica was established in 1971 and is the oldest broker of PCB in the world. Delivering to 5 continents and 39 countries with over 10 000 orders per year, to small family businesses and companies listed on the stock exchange. We are honored for being selected to chair several new independent standards in our industry together with IPC.

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**Elmatica CEO approved member of the Swedish Cyber Defence and Export Control groups**

“We are pleased that Didrik Bech is willing to contribute time and effort to the collective work of the groups “ ,says Robert Limmegård, Secretary general at SOFF.

The amount of cyber-attacks on companies is rising, and the jungle of defence regulations pushes the need for Compliance Control in front. This has led to an increased focus in the defence industry to learn more about Cyber Security and Export Control.

“We are very pleased that Elmatica has joined both our Cyber Defense Group and our Export Control Group. The engagement from our member companies are crucial for the development and enhancement of the market. We are pleased that Didrik is willing to contribute time and effort to the collective work of the groups”, says Limmegård.

Certified for FAR, DFARS and ITAR - starting to work on CMMC

Last year Bech was Certified in FAR, DFARS, ITAR, Advanced ITAR and Cyber Security by the Federal Publications Seminars (FPS) in Washington, presented at several defence seminars in the Nordics and has started working on implementing the new CMMC regulations. “SOFF is

establishing a valuable and important arena for the Swedish Defence Industry to meet, learn and discuss. We appreciate the effort they put into further enlightening the field of Cyber Security and Export Control, and are honoured to be able to share our knowledge and experience, says Bech.

The Cyber domain is in a continually evolving landscape “The industry is set on meeting new challenges and as an association, the knowledge of the companies are an important contribution to how we as an association can promote the best policies, practices, and innovation needed to ensure that an effective market supports our Armed Forces”, says Limmegård.

Limmegård specifies that the work carried out within the fields of cyber defence and export control are two of the most important groups. “Especially with new national and European cybersecurity legislation and a new set of cybersecurity standards developed by the US Department of Defense (DoD), the cyber domain is in a continually evolving cyber landscape”,

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# EIPC SPEeDNEWS

*The Weekly On-Line Newsletter*  
*Issue 17 - June 2020*

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## NEWS FROM SWITZERLAND

### DYCONEX AG implements various measures to reduce lead time



*DYCONEX AG announces the first results from its scheme to reduce the lead time in manufacturing. Production flow has been improved over the past eight months, while waiting times have been cut and investments have been made in new machinery.*

DYCONEX has defined a range of measures as part of its project to shorten the lead time in sales and manufacturing. These measures have already made a significant impact, leading to a reduction of up to 15% in February through May 2020:

- Installation of a new UV laser, which reduces the processing time for various products by up to 50%.
- Installation of new transport and handling robots with a higher throughput.
- Implementation of lean office activities within the sales department.
- Implementation of various lean activities in production, from planning through to panel handling.
- Increase in testing capacities (e.g. for e-tests and hot e-tests).

DYCONEX is continually working on further reducing the lead time for sales and manufacturing processes with the help of these measures, with a view to making the time it takes to deliver to its customers noticeably shorter.

#### **About**

#### **DYCONEX**

#### **AG**

With more than 50 years of experience, DYCONEX AG is a global leader in the supply of highly complex flexible, rigid-flex and rigid ultra-HDI/microvia circuit boards, LCP substrates and chip-substrate solutions. These products are used in every application where miniaturization, increased functionality, quality and the highest level of reliability play a role. With its headquarters in Bassersdorf, DYCONEX today has 190 employees and the company is a member of the Micro Systems Technologies Group.

**About the Micro Systems Technologies group**

The Micro Systems Technologies group consists of four high-tech companies that offer innovative components and services for medical devices and other high-tech industries that demand exceptional performance, quality and the highest levels of reliability. The globally active companies that make up the MST group – DYCONEX AG (Switzerland), LITRONIK Batterietechnologie GmbH (Germany), Micro Systems Engineering GmbH (Germany) and Micro Systems Engineering, Inc. (USA) – offer their customers integrated solutions ranging from initial design through to series production.

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## EIPC SPEeDNEWS

*The Weekly On-Line Newsletter from the European Institute of Printed Circuits.  
Issue 17 – June 2020*

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### ELECTRONIC INDUSTRY NEWS

#### McKinsey: Bumpy Rebound in Asia-Pacific Supply Chain

*By Barbara Jorgensen*

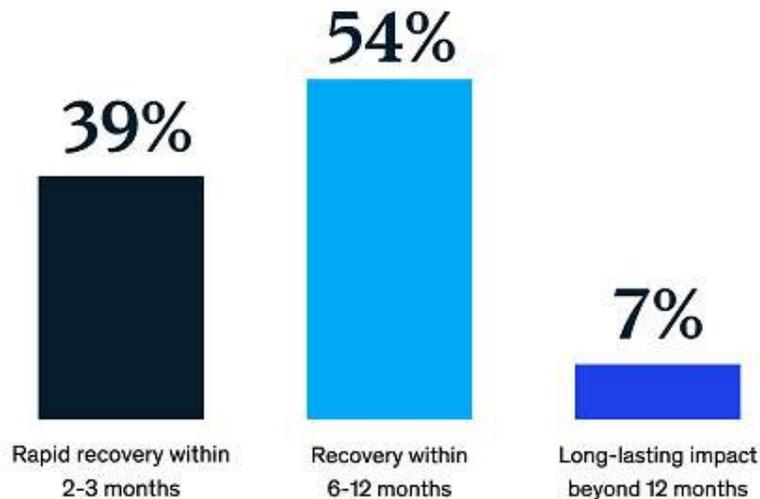
The Asia-Pacific region -- now an epicenter of electronics -- is at widely varying points on its journey through the COVID-19 pandemic. China is broadly beginning to restart its operations amid recovering domestic demand, while other geographies, such as Southeast Asia, Japan, and South Korea, are still tackling cases and under a range of control measures to help stop the spread.

##### **Recovery is coming, but isn't here yet**

Overall, 39 percent of respondents are confident that the manufacturing sector will recover rapidly from disruptions caused by COVID-19, according to a study by McKinsey, estimating that as little as two to three months will be sufficient. However, 61 percent expect that recovery will take at least six months.

## Responses show a marked split in expectations for when recovery could take hold.

Confidence in recovery of the manufacturing sector from the effects of COVID-19, %



Source: McKinsey COVID-19: Global Manufacturing & Supply Chain Pulse Survey (2020)

McKinsey  
& Company

Responses

split by subregions across Asia Pacific—Australia and New Zealand; China; Japan and South Korea; South Asia; and Southeast Asia—found optimism closely aligns with the stage of progression through the pandemic timeline.

Nearly half of respondents in China expect rapid recovery, possibly because the country is further along the timeline in its pandemic response. Responses from Southeast Asia, Japan, and South Korea, on the other hand, report markedly lower confidence in a swift recovery. The majority of these regions are still tackling cases and only just beginning to ease lockdown measures—South Korea is currently preparing to slowly and cautiously proceed to the next normal under “everyday quarantine” measures.

Japan’s lack of confidence is worth noting, as the country has a wealth of experience managing natural disasters and boasts a manufacturing sector that is well-versed in responding to and recovering from them. Nevertheless, the dynamic nature of COVID-19 appears to have challenged the Japanese manufacturing sector.

"Despite the relative success of Australia and New Zealand in controlling the spread of COVID-19—at this writing, the two countries’ incidence rates are both less than one-tenth of rates seen in Western European and North America—almost 20 percent of respondents from Australia and New Zealand expect manufacturing operations to take longer than 12 months to recover," the study noted. "In Australia, this negative sentiment may be due to its manufacturing profile which is largely focused on the hardest hit primary industries."

### **The impact of COVID-19 is being felt across industries**

Five common challenges are identified by leaders across industries: material shortages; drop in demand; worker shortages; cash-flow issues; and planning issues.

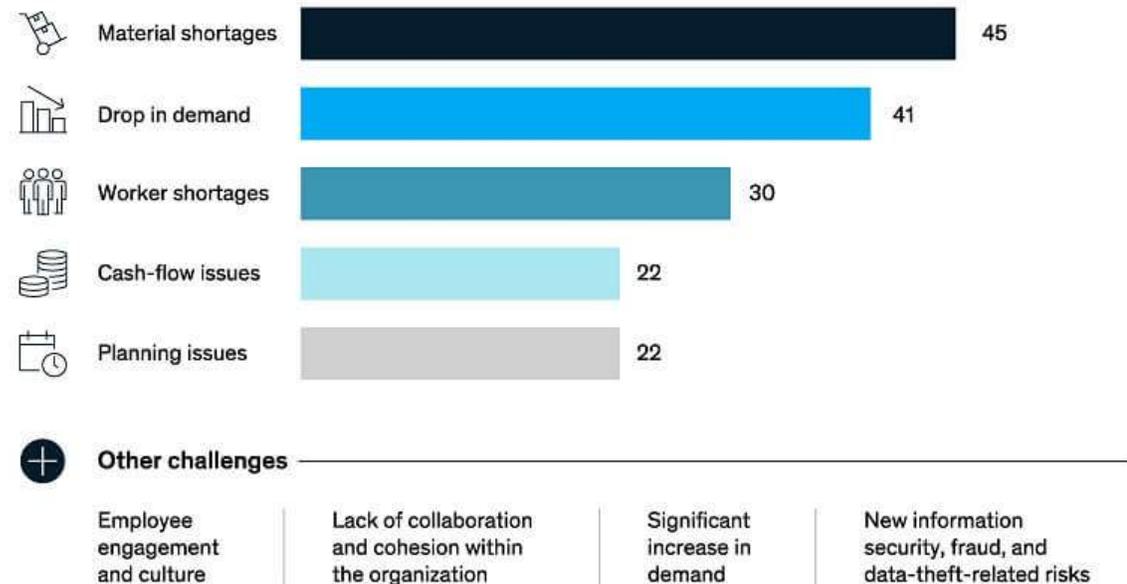
Advanced industries are most affected by material shortages, primarily due to interconnected supply chains spanning multiple geographies. For example, a respondent

from an auto company in Southeast Asia commented, “We are facing raw-material shortages from tier-2 companies, including aluminum and imported chemicals.”

The biggest impact on consumer-facing companies is decreased demand, particularly in discretionary categories such as apparel, fashion, luxury goods, skincare, and cosmetics, where demand has dropped significantly during the pandemic.

## COVID-19 has disrupted businesses worldwide, resulting in a range of operational challenges.

Challenges faced due to the effect of COVID-19 disruption<sup>1</sup>, %



<sup>1</sup>Multi-select question – respondents selected multiple options.  
Source: McKinsey COVID-19: Global Manufacturing & Supply Chain Pulse Survey (2020)

### McKinsey & Company

Labor-intensive industries are suffering the most from worker shortages, many of which are due to restrictions on workplace capacity and physical-distancing measures. This challenge is expected to resolve independently as restrictions are lifted and more employees are able to return to the workplace.

Demand volatility is causing issues for planning, with many leaders reporting that they are finding it challenging to trigger new orders because they cannot make accurate demand forecasts.

Leaders also reported cash-flow issues—both on their own part and across their multitier supplier chains. Additionally, McKinsey's research reveals some examples of automotive original equipment manufacturers (OEMs) partnering with other organizations to jointly manage risks for suppliers. For example, a leading auto OEM provided a lower commercial discount rate and multichannel financing support to its suppliers.

Digital options can also help. While many of the top challenges faced by each industry seem to be influenced by their specific external situations, there is an opportunity across sectors for companies to leverage their data to create transparency and better address short- and

medium-term demand and supply-chain implications. In this way, companies can minimize disruptions and optimize cost.

**Resilience and reimagination—short-term actions and long-term strategy**

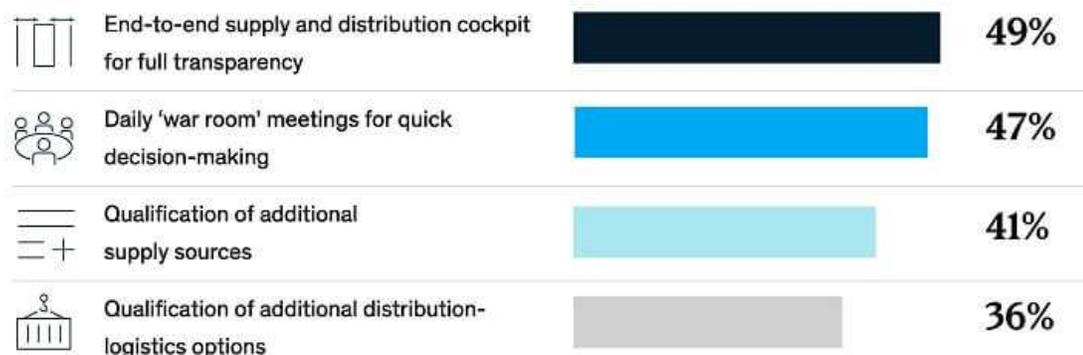
To respond to these challenges, industry leaders are making quick short-term pivots as they take immediate actions to restart operations and ramp up production while considering resource availability and demand fluctuations. In the medium to long term, more strategic changes are being made to build resilience and enhance efficiency.

To deal with challenges concerning material shortage, leaders are increasing end-to-end transparency and implementing nerve centers to help navigate the storm, while also increasing their supplier and logistics bases to mitigate potential long-term risk. For example, a leading automotive manufacturer decided to move away from a sole-supplier partnership for one of its critical components, while another respondent reported that it is engaging with vendors much earlier to ensure supply continuity over a period of 6-12 months.

In response to reduced capacity due to worker shortages, most of the industry leaders reported that they are focusing their efforts on fulfilling demand from priority customers. For example, a leading automotive player in China resumed its production in stages, beginning with production of its fastest-selling products, while a consumer-products manufacturer in New Zealand reported changing its production mix, and an oil and gas respondent in Singapore is prioritizing work type in order of safety, compliance, and reliability.

**Transparency and nerve centers help mitigate potential long-term risks.**

Measures to minimize materials shortages<sup>1</sup>, %



<sup>1</sup>Multi-select question—respondents selected multiple options.  
Source: McKinsey COVID-19: Global Manufacturing & Supply Chain Pulse Survey (2020)



Additionally, leaders are also considering investments to automate production lines to enhance productivity where they are dealing with a shortage of workers, while in some less-skilled environments, leaders are preferring to hire additional temporary employees and implementing rapid capability-building programs. A white-goods manufacturer in China solved its understaffing problem through cross-training its employees, deploying their administrative staff to production-related tasks.

**Is your supply chain risk blind—or risk resilient?**

As leaders plan the return phase of their operations, employee safety is their primary concern while they restart and stabilize their operations in the next normal. Across subregions, respondents report that implementing basic safety measures, such as employee temperature checks and the use of face masks, has been a top priority.

Though many respondents are prioritizing the reconfiguration of common areas such as canteens and factory entrances to allow for physical distancing, there is lower inclination towards reconfiguring shop floors. Some of this may be due to challenges such as inadequate floorspace, an inability to deploy support services because of lockdown measures, or a potential fear of falling productivity. Such reconfigurations will also likely require investment that leaders may be less inclined to make, as they may not offer long-term value once restrictions on physical distancing are lifted. However, one automotive-company executive has suggested that there may be a possibility to increase manufacturing productivity while adopting some these safety measures.

"While the COVID-19 pandemic remains first and foremost a humanitarian challenge, as we move further along the timeline it is creating an opportunity for companies to reimagine their operations," said the report. "Many have already begun to do so, and history tells us that those which build resilience into their operations will be well placed to move further and faster than their peers in recovery as we transition into our next normal."



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## International Diary

### 2020

#### **EIPC Webinar with Walt Custer**

Business Outlook for Global Electronics Industry

**Fully booked!**

23 June

#### **KPCA**

21-23 July

Incheon, Korea

#### **FED Conference**

17-18 September

Augsburg, Germany

#### **IPCA Expo**

23-25 September

India

#### **EIPC @ Evertiq Expo**

20 October

Tampere, Finland

#### **TPCA Exhibition**

21-23 October

Taipei, Taiwan

#### **EIPC @ Electronica 2020**

10-13 November

München, Germany

#### **ECWC15, WECC World Electronics Circuits Council**

30 November-2 December

Shenzhen, China

**HKPCA Exhibition**  
2-4 December  
Hong Kong, China

**2021**

**EIPC @ SMTconnect**  
4-6 May  
Nuremberg, Germany