# Annex A: Full methodology

## A.1 Report design decisions

This annex provides the full account of how this report was designed, how the data was collected and prepared, and how every analytical decision was made. It is intended for readers who want to verify a figure, understand a definition, or follow the analysis step by step.

The focus on retention was a collective decision, reached in consultation with consortium partners and through engagement with the ECDA DEI working group between December 2025 and February 2026. That process was set up to define sector priorities and identify where new research would add most value. Several areas emerged, including the talent pipeline, but the pipeline is already served by existing research. Retention was the gap prioritised: it was identified as a major difficulty for individual organisations and for the competitiveness of the sector, with little evidence specific to the European semiconductor workforce. For a project whose purpose is building inclusive workforces, the case was direct. An organisation cannot build an inclusive workforce while losing the technical talent it already has.

The report's format also responds to feedback. Stakeholder feedback on the first ECDA report was that its length limited its use. This report was therefore designed as a shorter, action-focused document: findings lead, method is summarised in one page in Chapter 2, and the full process detail sits here.

## A.2 Survey method

The survey ran from March to May 2026 and covered six areas of working life: what drew respondents to the sector and how it matched their expectations, what they value most and how well their role delivers, their future in the sector, the pressures of their work and the support their organisation provides, the fairness and clarity of career progression, and what would most improve their experience. The full instrument is reproduced in Annex C.

The survey was distributed through social media, including LinkedIn, and through partner networks, industry bodies and professional associations. Two conditions governed inclusion: each respondent gave informed consent to participate, and each confirmed the statement "I am a technical worker in the semiconductor sector in Europe." In total, 220 technical workers met both criteria, with 247 responses in total.

Two steps were taken in preparing the open-text data. Qualitative responses written in French, Italian and German were translated directly into English, with no added interpretation. Spelling errors in responses were corrected. No other changes were made to respondents' words.

The sample is a convenience sample reached through the channels above, not a probability sample of the European semiconductor workforce. It skews experienced and male and is geographically concentrated: Ireland and Germany together account for just over six in ten respondents. The full country breakdown is given in section A.6.

## A.3 Interview method

The survey was complemented by four semi-structured interviews: HR professionals in Germany and France, and national sector bodies in Spain and Ireland. The interviews had two aims. The first was to understand the trends practitioners observe in the loss of technical talent. The second was to understand what organisations are putting in place to slow those exits. The interview protocol is reproduced in Annex D.

Interview material was analysed thematically and aligned to the same three-strand frame used for the survey open text: what makes people stay, what helps them grow, and what drives them to leave. Interview sources are identified by role and country only, never by organisation name. With four interviews, no interview theme can support a claim about how widespread a practice or experience is. Where an interview theme converges with a survey finding, that raises confidence in the mechanism described rather than in its prevalence. Findings attributable to a single interview are attributed to that country and source type only.



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## A.4 Variable definitions and computed measures

The analysis used the survey variables directly and a set of computed variables built from them. Each computed variable is defined below.

| Variable | Definition |
|---|---|
| LeaveIntent | 1 = intends to leave the organisation within three years or is actively looking; 0 = staying (intends to stay more than three years, or has no plans to leave). Built from Q8. |
| RetireFlag | 1 = born before 1965 and planning to leave, treated as a plausible retirement; 0 = otherwise. Used to exclude likely retirements from the leave-intent models. |
| TenureBand | Years in the sector (Q24) grouped into five bands: under 2, 2 to 4, 5 to 7, 8 to 15, 16 plus. |
| CountryGroup | Ireland, Germany, Other. Only Ireland and Germany had enough respondents for country-level comparison. |
| DemandsMean | Mean of the eight Q11 job-demand items (pace, workload, mental effort, emotional demands, working outside hours, conflicting instructions, administrative burden, changing priorities). Computed where at least six items were answered. |
| ResourcesMean | Mean of the nine Q12 support items (flexibility, involvement in decisions, colleague support, clear expectations, feedback, manager support, learning and development, growth opportunities, feeling safe to speak up). Computed where at least seven items were answered. |
| SDTneeds | Mean of the Q6 satisfaction items for belonging, technical challenge and purpose, reflecting the three needs of Self-Determination Theory, which holds that people are most motivated where needs for belonging, capability and purpose are met. Computed where all three were answered. |
| Q17_fair | Perceived fairness of progression on a 1 to 4 scale (very fairly to very unfairly), with “Not sure” responses set aside so the scale stays ordered. |
| Gap flags (nine) | For each of the nine aspects of working life, flagged 1 where the respondent rated the aspect Essential in importance (Q5) but Below what I need in satisfaction (Q6). |
| GapCount | Number of unmet essentials, 0 to 9, summed from the gap flags. |
| Strength flags (nine) | The positive mirror: flagged 1 where the aspect was rated Essential and satisfaction was Meets or Exceeds what I need. |
| StrengthCount | Number of met essentials, 0 to 9. |
| RoleGroup | Role (Q22) mapped to the occupational classification in the ECSA Skills Strategy 2024: Hardware engineers, Technicians, Software engineers, Data specialists, Others. Software engineers and Data specialists are merged into one Software and data group for testing. The full mapping is given in Annex B. |

Internal consistency of the three multi-item scales was acceptable to good: job demands (Cronbach’s alpha .815), job resources (.834) and SDT needs met (.707).

## A.5 Analytical decisions in full

The decisions below shaped how the data was handled. The main decisions are summarised in Chapter 2. This is the complete record.

- Retirees excluded from leave models only. Respondents flagged as plausible retirees are excluded from all models and tests of intention to leave (n=216), so that the findings reflect avoidable turnover an employer can influence rather than departures that would happen regardless. The main model was also rerun with retirees included as a check, and the fairness finding held. The exclusion applies only to leave-intent analysis: descriptive questions about entry to the sector and attitudes use all 220 respondents.
- Scope of every finding. All findings measure intention to leave one’s organisation within three years. They do not measure actual attrition, and leaving an organisation is not leaving the sector. No finding or recommendation claims otherwise.



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- Country comparison limited to Ireland and Germany. These were the only two countries with enough respondents to support reliable comparison (95 and 39). All other countries are reported descriptively and never tested against one another.
- Fairness tested on definite views. Tests involving progression fairness use only respondents who gave a definite view (188 of 220). Those who answered “Not sure” were set aside rather than forced onto the scale. Where other exclusions also apply, the base is smaller and is reported with the test.
- The 8-to-15-year band kept broad. Dividing this band more finely would have left groups too small to test with confidence.
- Small groups reported as directions. Findings for smaller subgroups, such as individual generations, are reported as reliable directions rather than precise figures. With 33 women in the sample, only sizeable gender differences would have been detectable. Flat gender results mean no detectable difference at this sample size, not proof that none exists.
- Q1 reported in full, collapsed for testing. The eleven entry-reason categories are kept in full for descriptive reporting, since the small categories are themselves findings. For subgroup testing they are collapsed to four groups, and any significant result was checked against adjacent groupings to confirm it does not depend on one collapse choice.
- Expectations handled descriptively. The expectations item (Q2) was unstable in the multi-factor model and is reported descriptively.
- Test selection. Group comparisons on ordinal measures use Kruskal-Wallis or Mann-Whitney tests. Categorical associations use chi-square, with Fisher’s exact test where expected cell counts fall below five. Models of leave intention use logistic regression. Significance is assessed at $p < .05$, and the exact base (n) is reported for every test.
- Analysis environment. The analysis was conducted in IBM SPSS and in Python, with computed variables built to the definitions in section A.4 and results cross-checked between the two.

## A.6 Country sample breakdown

Respondents by country of residence (Q25), all 220 respondents.

| Country | n | % |
|---|---|---|
| Ireland | 95 | 43.2 |
| Germany | 39 | 17.7 |
| France | 25 | 11.4 |
| Italy | 17 | 7.7 |
| Belgium | 16 | 7.3 |
| Switzerland | 7 | 3.2 |
| United Kingdom | 5 | 2.3 |
| Portugal | 4 | 1.8 |
| Spain | 3 | 1.4 |
| Czech Republic | 2 | 0.9 |
| Denmark | 1 | 0.5 |
| Finland | 1 | 0.5 |
| Hungary | 1 | 0.5 |
| Norway | 1 | 0.5 |
| Ukraine | 1 | 0.5 |
| Prefer not to say | 2 | 0.9 |
| Total | 220 | 100.0 |



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## A.7 Analysis record: every test and result

This section is the full technical record of every test in the analysis, grouped by research theme. Each row gives the finding, the test used, the key number, the base (n), an effect size where one exists, and a plain verdict. Rows are numbered in the order the tests were run. The report body carries no test names or p-values. This record carries that detail.

Verdict key: SUPPORTED (clear effect), NULL (no effect, well-powered), SOFT NULL (no effect but underpowered, direction only), MIXED (partial), DESCRIPTIVE (no test, shape only).

Standing notes that apply throughout: - Retirees (RetireFlag=1) are excluded from the leave-intent regression models (n=216) so factors reflect turnover employers can act on. Descriptive "who is leaving" tests use the full sample (n=220). The base is stated for each test. - Several attitude items are coded so higher = worse (Q03, Q07, Q13, Q16, Q17, Q20). Verdicts below are stated by meaning, not raw sign. - All findings are correlational and use intention to leave, not actual leaving. This applies to every row and is not repeated per line. - With four interviews, no interview theme supports a claim about prevalence. Convergence with a survey finding raises confidence in the mechanism described.

Models of intention to leave

| # | Finding | Test | Key number | n | Effect | Verdict |
|---|---|---|---|---|---|---|
| 12 | Of six factors tested together, progression fairness is the only one that stays significant | Logistic regression (6-factor) | Sig. .020 | 216 (53 leavers) | ~2.3x more likely leaving if progression feels unfair | SUPPORTED |
| 13 | Same model rerun with retirees included, fairness holds | Logistic regression | fairness ~2.1x | 220 | n/a | SUPPORTED (retirees incl.) |
| 12b | The other five (support, clarity, reward, expectations, tenure) each link to leaving alone but drop out when competing | Logistic regression | individually sig.; tenure not | 216 | n/a | MIXED (overlap) |
| 14/15 | Support predicts leaving; pressure does not | Logistic regression (JD-R, 2-factor) | support sig.; pressure ns | 216 | support odds ~0.42 | SUPPORTED |
| 16 | Feeling you belong, are challenged and have purpose predicts staying | Logistic regression (SDT) | Sig. .001 | 216 | odds ~0.31 | SUPPORTED |
| 17 | JD-R and SDT explain about the same | Model comparison | $R^2$ .082 vs .080 | 216 | n/a | MIXED (two lenses, one message) |

Caveat: six factors on 53 leavers is stretched. Expectations (Q02) was unstable in the model and is handled descriptively. Read Step 12 as "fairness stands strongest when factors compete", not "only fairness matters".

Stayers and leavers compared, item by item

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 18 | Leavers less satisfied on belonging, reward, purpose, balance, | Mann-Whitney | belonging <.001 (ranks 90 vs 118); reward .004; purpose .003; balance | 220 (57 leavers) | SUPPORTED |



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| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| | recognition | | .003; recognition .023 | | |
| 18b | No stay/leave difference on sector meaning, technical challenge, senior leaders value me, manager support | Mann-Whitney | .107 / .151 / .256 / .488 | 220 | NULL |
| 19 | Leavers feel less supported overall; pressure does not differ | Mann-Whitney | support .001 (ranks 87 vs 119); pressure .135 ns | 220 | SUPPORTED (support); NULL (pressure) |
| 20 | Eight of nine everyday supports separate stayers from leavers, led by voice and clarity | Mann-Whitney | safe to speak up .003; feedback .004; clear expectations .010; decisions .018; L&D .031; manager .037; grow .043 | 220 | SUPPORTED |
| 20b | Flexibility does not separate stayers from leavers | Mann-Whitney | .578 ns | 220 | NULL (because near-universal: ~80% have it often/very often) |
| 21 | Leavers feel progression less fair, less supported, much less optimistic the place will improve | Mann-Whitney | optimism <.001; fairness <.001 (n=188); support balance .016 | 220 / 188 | SUPPORTED |
| 22 | Path clarity and expectations-match separate the groups; being overlooked once does not | Chi-square | path clarity .003; expectations <.001; overlooked .125 ns | 220 | MIXED (structural sig.; one-off slight null) |
| 22b | Why people joined the sector has no link to leaving | Chi-square (5 groups) | .810 | 220 | NULL (clean, healthy cells) |
| Gap-A | The more unmet essentials someone has, the more likely they are leaving | Mann-Whitney | <.001 (ranks 137 vs 101) | 220 | SUPPORTED |
| Gap-B | Specific unmet essentials linked to leaving: purpose, reward, balance, challenge, leaders | Chi-square | purpose .003; reward .005; balance .010; challenge .022; leaders .028 | 220 | SUPPORTED |
| Gap-B2 | Belonging gap points the same way but underpowered; recognition, manager, impact gaps not sig. | Chi-square / Fisher | belonging .057 (Fisher .070); recognition .281; manager .505 | 220 | SOFT NULL (belonging); NULL (rest) |

Reward is the strongest single target: the most common gap, and one of the gaps linked to leaving.

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Who is leaving: demographics, tenure and country (full sample, n=220)

| # | Finding | Test | Key number | n | Effect | Verdict |
|---|---|---|---|---|---|---|
| 23 | Leaving does not differ by country | Chi-square | .902 | 220 | Cramer's V .031 | NULL |
| 24 | Younger workers leave at roughly double the Gen X rate | Chi-square | .036 (Gen Z 33%, Mill 34%, Gen X 18%) | 201 | Cramer's V .182 | SUPPORTED |



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| # | Finding | Test | Key number | n | Effect | Verdict |
|---|---|---|---|---|---|---|
| 25 | Leaving does not clearly differ by tenure; soft early-years signal | Chi-square / Mann-Whitney | banded .106; unbanded .125 | 218 | Cramer's V .187 | SOFT NULL |
| 26 | Among leavers, most who decided plan to stay in the sector; no country difference | Fisher's exact | .694 | 29 | n/a | DESCRIPTIVE (too small) |

Conclusion: who someone is matters far less than how they are treated. Country and tenure do not separate leavers. Generation does, and the generational difference likely traces back to the same workplace conditions.

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What is going well: strengths and advocacy

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 26b | Stayer profile: positively engaged, not inert (87% recommend sector, 96% positive about future, 82% feel well supported; every facet delivered for a majority) | Frequencies | n/a | 163 stayers | DESCRIPTIVE |
| 27 | Recommending the sector goes with meaning, sector mattering, safe to speak up, recognition | Spearman | meaning .36; sector .31; speak up .29; recognition .28 (all <.001) | 220 | SUPPORTED (modest, ~.3) |
| 28 | Path clarity goes with optimism; support goes with optimism | Spearman | path/optimism +.45; support/optimism .585; colleague/support -.33; flex/future -.17 (.010) | 220 | SUPPORTED (two firm, two weak) |
| 29 | People whose job met or beat expectations far more likely to recommend the sector | Kruskal-Wallis | <.001 (gradient) | 220 | SUPPORTED |
| 30 | Among decided leavers, sector-stayers beat sector-leavers ~2:1; nearly half undecided | Frequencies | Yes 35% (19), No 19% (10), Unsure 46% (25) | 54 leavers | DESCRIPTIVE |
| 31 | Stayers have more essentials met and fewer unmet; gap side is the sharper signal | Mann-Whitney | unmet <.001 (ranks 137 vs 101); met .007 (117 vs 91) | 220 | SUPPORTED |

Bounded headline (Step 30, hard limit): about a quarter of the workforce surveyed (26%, 57 of 220) plan to leave their employer, and of those, up to 65% are not committed to staying in the sector (19% set on leaving it, 46% undecided). Keep as a two-part sequence on the 54-leaver base. Do NOT multiply into a single whole-workforce figure or extrapolate to the sector.

Note: technical challenge does not separate leavers from stayers because it is delivered almost universally (92% of stayers, and .151 ns in the satisfaction comparison). Advocacy rests on meaning rather than challenge. The report presents the survey and interview perspectives as two lenses, not as one correcting the other.

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Attitudes and group differences

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 32 | Support, fair and clear | Spearman | support/optimism .601; | 220 | SUPPORTED |



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| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| | path, optimism and recommending form one connected web; pressure sits at the edge | matrix | fairness/resources .584; pressure links weak (.15 to .42) | (fairness 188) | |
| 32b | The combined support bundle still separates leavers | Mann-Whitney | .002 (ranks 85 vs 116) | 216 | SUPPORTED |
| 33 | General unfairness and personal feeling of being overlooked are related but distinct | Spearman | rho -.248, <.001 | 185 | SUPPORTED (modest, distinct) |
| 34 | Leavers cooler on recommending the sector, but not lost to it | Mann-Whitney | <.001 (ranks 134 vs 100) | 216 | SUPPORTED (softening, not rejection) |
| 34b | The undecided group, not the sector-leavers, are coolest on recommending | Kruskal-Wallis | <.001 (stay 57.8, leave 78.9, unsure 85.2) | 140 | SUPPORTED (winnable but wavering) |
| 35 | More pressure goes with worse-feeling support (ordinary strain) | Spearman | rho .419, <.001 | 216 | SUPPORTED (snapshot, not causal) |
| 36 | Ireland reports better everyday support than Germany | Mann-Whitney | .006 (ranks 71.4 vs 51.3) | 130 | SUPPORTED (optional country box only) |
| 36b | No clear Ireland/Germany difference on fairness | Mann-Whitney | .073 | 110 | SOFT NULL (near line, thin bases) |
| 37 | Younger workers weight work-life balance more; purpose shared across all ages | Chi-square | balance .008; reward .067; purpose .115 | 216 | MIXED (balance sig.; reward/purpose ns) |
| 38pre | Most technical workers want to grow at the work, not climb out of it | Frequencies | grow depth 45% | 205 | DESCRIPTIVE |
| 38a | Progression type does not predict leaving | Chi-square | .538 | 205 | NULL (healthy cells) |
| 38b | Progression type does not predict fairness feeling | Kruskal-Wallis | .655 | 175 | NULL |
| 38c | Progression type does not differ by gender | Chi-square | .520 | 205 | SOFT NULL (32 women) |
| 38 | What “progression” means shifts by generation: younger want technical-skills growth | Chi-square | .037 (grow skills Gen Z 67%, Mill 49%, Gen X 38%) | 205 | SUPPORTED (skills slide); CAUTION (50% cells <5) |
| 39 | Path clarity does not differ by generation | Kruskal-Wallis | .380 | 201 | NULL |
| 40 | Progression feels least fair at the 8 to 15 year band | Kruskal-Wallis | .017 (8-15 rank 117, peak) | 183 | SUPPORTED; converges with interview tenure risk windows (T6) |
| 41 | Flexibility by role | n/a | not run, sample too thin | n/a | DROPPED |



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| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| | | | (fab/process n=26) | | |
| 42 | People do not sour on the sector the longer they stay | Chi-square | .200 | 214 | NULL |

Gender and generation

Gender setup: men compared with women, with “prefer not to say” excluded. With 33 women, only a sizeable gap would be detectable. A flat result means no difference was detected at this sample size, not that none exists.

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 43.1 | Leaving does not differ by gender | Chi-square | .885 (men 23.1%, women 24.2%) | 202 (33 w) | NULL |
| 43.2 | Fairness does not differ by gender | Mann-Whitney | .715 | 173 (25 w) | NULL (most report-relevant) |
| 43.3 | Feeling overlooked does not differ by gender | Mann-Whitney | .506 | 165 (28 w) | NULL |
| 43.4 | Support and pressure do not differ by gender | Mann-Whitney | support .247; pressure .277 | 202 (33 w) | NULL |
| 43.5 | Path clarity does not differ by gender | Mann-Whitney | .686 | 202 (33 w) | NULL |
| 43add-S | Younger workers feel better supported | Kruskal-Wallis | .011 (Gen Z best) | 201 | SUPPORTED |
| 43add-P | Younger workers report much less pressure | Kruskal-Wallis | <.001 (Gen Z lowest) | 201 | SUPPORTED |
| Gen-1 | Younger workers see growth opportunity at least as clearly | Kruskal-Wallis | .089 | 201 | SOFT NULL (leans higher, not lower) |
| Gen-2 | Younger workers feel at least as positive about their future | Kruskal-Wallis | .155 | 201 | NULL (leans positive) |
| Gen-3 | Younger leavers’ reasons cluster on pace, pay and better opportunity, not dissatisfaction | Crosstabs (descriptive) | Gen Z ~two-thirds on pay + better offer + blocked path; relational near zero | 111 considering | DESCRIPTIVE |

Generation block conclusion: younger workers’ higher leaving is opportunity-driven mobility, not unhappiness. Retention lever for them is pace of progression and competitive offer, not support or culture. Honest limit: cannot fully separate from general life-stage churn.

Open-text responses: stay, grow and leave

No significance tests apply in this group. It reports coded free-text responses, read as leans against small bases.

| # | Finding | Method | Key number | base | Verdict |
|---|---|---|---|---|---|
| 44 | Why stayers stay: good people, interesting work, flexibility, security recur | Coding (Q04) | n/a | stayers | DESCRIPTIVE (STAY strand) |
| 45a | Progression means deepening expertise and | Coding (Q14) | mastery dominant | 159 | DESCRIPTIVE (GROW strand) |



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| # | Finding | Method | Key number | base | Verdict |
|---|---|---|---|---|---|
| | responsibility, not climbing out | | | | |
| 45b | What the org could do: make the path explicit, fix culture and management, pay/conditions | Coding (Q21) | three clusters | 145 | DESCRIPTIVE (GROW/LEAVE) |
| 45-skim | Q01/Q02/Q19 skim: confirms pay, progression and conditions threads; nothing new | Skim | text sparse (8/20/12 rows) | 216 | DESCRIPTIVE |
| 46-Q14 | Leavers fold pay and promotion into the meaning of progression more than stayers | Coding by side | pay 54% vs 34%; promotion 27% vs 15% | 41 leavers | LEAN (small base) |
| 46-Q21 | Leavers ask for culture and management change far more; no leaver said the place was already fine | Coding by side | culture 20% vs 6%; management 26% vs 17%; “fine” stayers 9%, leavers 0% | 35 leavers | LEAN (small base) |
| 46-Q02 | All bureaucracy/rigor complaints came from leavers; too small to count further | Coding by side | 3 of 3 leavers | 12 leavers | DESCRIPTIVE (too small) |
| Belong | Belonging-as-absence (isolation by specialism) is a distinct but thin seam, carried by stayers | Belonging sweep across all fields | ~4 rows absence (3 stay, 1 leave) vs ~16 rows presence | 187 text rows | FLAGGED SEAM (not a leave driver) |

Survey-only codes added to the shared frame: belonging-as-absence (new theme, across STAY and LEAVE, thin), gendered progression-meaning (shade within GROW: women weight mastery+recognition, men weight pay), grad-salary-correction knock-on (fairness mechanism within LEAVE).

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Role groups (ECSA classification)

Grouping follows the ECSA Skills Strategy Annex 1 classification of job profiles by main occupation: Hardware engineers (109), Others (51), Technicians (31), Software engineers (14) and Data specialists (9), with six unclassified. Software engineers and Data specialists are merged into one Software and data group (n=23) for testing only, the single stated departure from ECSA, since each alone falls below the n=20 minimum. Retirees excluded from all role tests for sample consistency (role-tested base n=210).

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 47 | Role-group variable built to ECSA’s five occupations; free-text “Other” placed against the same definitions | Classification (verified against SPSS role table) | 109/51/31/23, 6 unclassified | 220 | DESCRIPTIVE (grouping step) |
| 48 | Planning to leave does not differ by role group (22-30% band) | Chi-square | p .902 | 210 | NULL |
| 49 | Progression fairness does not differ by role group | Kruskal-Wallis | p .740 | 179 (“Not sure” dropped) | NULL |
| 50 | Support does not differ by role group (means within | Kruskal-Wallis | p .929 | 210 | NULL |



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| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| | a tenth of a point) | | | | |
| 51 | Belonging does not differ by role group | Kruskal-Wallis | p .075 | 210 | NULL (closest of the set; Software and data lean highest, Others lowest, below threshold) |
| 52 | Path clarity does not differ by role group | Kruskal-Wallis | p .207 | 210 | NULL |
| 53 | Feeling overlooked for progression does not differ by role group | Chi-square | p .329 | 210 | NULL |
| 54 | Organisational optimism does not differ by role group | Kruskal-Wallis | p .240 | 210 | NULL |

Conclusion: role is not a dividing line for retention in this sample. The conditions that separate stayers from leavers are felt similarly across occupations, mirroring the country and tenure nulls. Generation remains the only demographic that separates leavers from stayers. This strengthens the report's central argument that the fixes are organisational, not role-specific.

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Reason for joining, by subgroup

Q1's 11 categories were collapsed to four for subgroup testing only: qualifications and training, interest in the technology, practical or career opportunity, and other reasons. The full 11-category detail is retained in descriptive reporting. All 220 respondents used, since this is an entry question and retiree exclusion applies only to leave-intent models. Subgroup-specific exclusions noted per row.

| # | Finding | Test | Key number | n | Verdict |
|---|---|---|---|---|---|
| 55 | Four-category collapse built; finer collapse rejected (half of cells under expected 5) | Collapse design | four groups: 59/76/49/36 | 220 | DESCRIPTIVE (design step) |
| 56 | Men and women joined for the same mix of reasons | Chi-square (Man vs Woman) | p .460 | 206 | NULL |
| 57 | Generations joined for the same mix of reasons | Chi-square (Gen Z/Mill/Gen X) | p .099 | 201 | NULL (closest; mild Millennial practical/career lean below threshold) |
| 58 | Role groups joined for the same mix of reasons | Chi-square | p .062 | 214 | NULL (borderline but well-filled cells; genuine null, not underpowered) |
| 59 | Reason for joining differs by tenure: longest-serving entered mainly via qualifications/training (~33%), newest joiners via a wider spread of routes | Chi-square (3 tenure bands) | p .038 | 218 | SUPPORTED (five-band test agreed, p .019, but thin cells; quote the three-band result) |

Conclusion: why people joined is the same across gender, generation and role. Tenure is the one line that separates. The sector's historical reliance on the education pipeline is clearest among its most experienced people, and the entry mix has broadened for more recent joiners. The result reinforces the pipeline-dependence finding from the Q1 descriptives.



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# Annex B: Role mapping

Respondents described their current role by selecting from a list of 19 job titles, with an open response option for those whose role was not listed. Each respondent was then assigned to an occupational group for analysis. The grouping follows the classification of semiconductor job profiles developed by the European Chips Skills Academy and published in its Skills Strategy 2024, prepared by DECISION Études & Conseil.

## The ECSA classification

The classification organises semiconductor roles into five occupational groups. The job profiles ECSA places within each are set out below.

| ECSA occupation | Job profiles ECSA places in this occupation |
|---|---|
| **Technicians** | Test technician, maintenance technician, process technician, operator or inspector, and test engineer. |
| **Hardware engineers** | Design engineer, system design engineer, analog design engineer, digital design engineer, process engineer, robotic engineer, computer engineer, power electronics engineer, material engineer, marketing engineer and application engineer. |
| **Software engineers** | Software engineer, embedded, firmware or cloud software engineer, and software designer. |
| **Data specialists** | Data scientist, data analyst, data engineer and machine learning engineer. |
| **Others** | General services, management, administration, human resources and sales. |

## Assigning the listed roles

Of the 220 respondents, 140 selected one of the 19 listed job titles. Each listed title corresponds to a single ECSA profile, so these were assigned directly to the group containing that profile.

## Assigning the open responses

The remaining 80 respondents used the open response option and described their role in their own words. Each was read individually and assigned to the group that matched the primary function of the role described, using the same ECSA definitions. These 80 responses did not fall into a single group. The largest share described management, leadership or business roles and were assigned to others, but a substantial number described engineering or research roles and were assigned to hardware engineers, with smaller numbers assigned to technicians and to software and data. Six responses were left blank or given as prefer not to say and could not be classified. The approximate distribution is shown below.

| Assigned to | Approx. | Typical descriptions given |
|---|---|---|
| **Others** | ~48 | Managers, directors, CEOs and founders, project and product managers, and business support roles. |
| **Hardware engineers** | ~21 | Engineering and research write-ins: reliability, verification, design, materials and R&D roles. |
| **Technicians** | ~3 | Laboratory and maintenance roles described in the respondent's own words. |

| Assigned to | Approx. | Typical descriptions given |
|---|---|---|
| **Software and data** | ~2 | Software, TCAD and EDA-tool roles. |
| **Not classified** | 6 | Blank responses or prefer not to say. |

## What the others group contains

The others group holds the roles ECSA defines as management, administration, human resources, sales and general services. In this sample it is made up mostly of management and leadership roles, from engineering managers and directors through to chief executives and founders, alongside a smaller number of business support roles. All respondents, including those in this group, met the study's inclusion criterion of self-identifying as a technical worker in the European semiconductor sector.

## Combining two groups

Software engineers and data specialists are separate occupations in the ECSA classification. In this sample each was small, at 14 and 9 respondents, below the sample size needed to analyse a group on its own. The two are combined into a single software and data group of 23 respondents. Both are computational roles, so the combination is coherent. This is the only point at which this report departs from the ECSA structure.

## Final groups

After grouping, the four occupational groups used throughout the report are as follows. The six respondents who could not be classified are excluded from role-based analysis. Descriptive figures reported in the main text are based on the classified sample.

| Group | Respondents |
|---|---|
| **Hardware engineers** | 109 |
| **Others** | 51 |
| **Technicians** | 31 |
| **Software and data** | 23 |
| **Not classified** | 6 |
| **Total** | **220** |

## Note

One listed option, expert in cybersecurity, does not appear under any occupation in the ECSA classification and was assigned to hardware engineers by inference; no respondent selected it, so it has no effect on any figure. The approximate counts shown for the open responses reflect the individual coding of free-text answers and are given to illustrate how the 80 responses were distributed; the group totals are the figures used throughout the report. Role-based statistical tests reported elsewhere use the sample with retirees excluded, for consistency with the other analyses in this report.



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# Annex C: Survey

## Creating workplaces where technical talent want to stay and grow

Survey of technical talent in the European semiconductor sector | 2026

### Introduction

What is the European Chips Diversity Alliance

The European Chips Diversity Alliance (ECDA) is an EU-funded consortium of 11 partners from 6 European countries, coordinated by SEMI Europe. Its aim is to improve inclusion in the European semiconductor sector by bridging industry and education, lowering barriers to participation for under-represented groups, and developing practical tools and programmes to support more belonging in workplaces.

About this survey

This survey explores the experiences of technical workers in the European semiconductor sector and what shapes their decision to stay or leave.

Your responses are anonymous and no company-identifying information is collected. The findings will inform a practical report for semiconductor employers and European policy makers, with the goal of making the sector a better place to work.

The survey takes approximately 10 to 15 minutes to complete. Most questions ask you to select a single answer or rate a statement. There are no right or wrong answers. We want to understand your genuine experience.

Who should complete this survey?

This survey is for people currently working in a technical role in the European semiconductor sector, including apprentices and interns.

Data Handling

Participation in this survey is confidential. All data is protected and secured and will be deleted after the ECDA project is completed in 2027. For questions, please contact ksrivastava@semi.org.

**Consortium Members**




**Associated Partners**




I confirm that I am a technical employee in the semiconductor sector in Europe.

- Yes
- No

I consent to participate in this survey.

- Yes
- No



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## Section 1: Your experience of the sector

These questions explore what brought you to the sector and how your experience has compared to your expectations.

Q1. What was the main reason you chose to work in the semiconductor sector?

Select one

Career growth opportunities

Job opportunities in my area

Job security

My qualifications or training led me here

Opportunity to contribute to social good

Opportunity to work on innovative technology

Recommendation from someone I knew

Reputation of the organisation I joined

Salary and benefits

Technical challenge of the work

Other (please specify)

Q2. Overall, how well has the sector matched your expectations?

Select one

Much better than expected

Somewhat better than expected

About what I expected

Somewhat worse than expected

Much worse than expected

Q3. If your answer was worse than expected, why is this the case?

Optional

Q4. How likely are you to recommend the semiconductor sector as a career?

Select one

Very likely

Likely

Neutral

Unlikely

Very unlikely



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## Section 2: What matters to you

These questions explore what you value most in your work and how well your current role delivers on what matters to you.

Q5. If you are planning to stay in your current organisation, what most influences that decision?

Optional

Q6. For each statement below, rate how important it is to you personally and how well your current role delivers on it.

| | **How important is this to you?** | | | **How satisfied are you currently?** | | |
|---|---|---|---|---|---|---|
| | *Not important* | *Somewhat important* | *Essential* | *Below what I need* | *Meets my needs* | *Exceeds my expectations* |
| I am fairly rewarded for my work | | | | | | |
| I feel a strong sense of belonging in my team | | | | | | |
| I find genuine meaning and purpose in my work | | | | | | |
| I have a healthy balance between my work and personal life | | | | | | |
| I see the semiconductor sector as important for global development | | | | | | |
| My contribution is recognised and valued | | | | | | |
| My day-to-day work is technically stimulating and challenging | | | | | | |
| My manager supports and advocates for me | | | | | | |
| Senior leaders are aware of and value my contribution | | | | | | |



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## Section 3: Your future in the sector

*These questions explore your sense of where you are headed and how long you see yourself in the sector.*

**Q7. Overall, I feel positive about my future in the semiconductor sector.**

*Select one*

- Strongly agree
- Agree
- Disagree
- Strongly disagree

**Q8. How long do you intend to stay in your current organisation?**

*Select one*

- Less than 1 year
- 1 to 2 years
- 2 to 3 years
- 3 to 4 years
- 4 to 5 years
- More than 5 years
- I have no plans to leave
- I am already actively looking to leave

**Q9. If you are considering leaving your current organisation, what is the main reason?**

*Optional*

- Better opportunity elsewhere in tech
- Lack of recognition for my technical expertise
- Limited career progression opportunities
- Limited learning or development opportunities
- Personal or life circumstances
- Quality of management or leadership
- Salary or benefits
- Poor work-life balance
- Limited flexibility in how or when I work
- Workplace culture or environment
- Other (please specify)

**Q10. If you are considering leaving your current organisation, do you intend to remain in the semiconductor sector?**

*Optional*

- Yes
- No
- Unsure



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## Section 4: Your working conditions

*This section asks about the day-to-day realities of your working environment. The first question covers the pressures and challenges the work places on you. The second covers what your organisation provides to support you.*

For each statement, choose how often it applies using the scale below:

1 = Never: this does not happen in my working week
2 = Rarely: this happens occasionally, perhaps once a month
3 = Sometimes: this happens most weeks but not every day
4 = Often: this happens most days
5 = Very often: this happens every day or multiple times a day

**Q11. Thinking about a typical working week, how often do the following apply to you in your organisation?**

| | 1 Never | 2 Rarely | 3 Some-times | 4 Often | 5 Very often |
|---|---|---|---|---|---|
| I have to work at a high speed or under significant time pressure | | | | | |
| I have more work than I can complete in the time available | | | | | |
| My work requires sustained mental effort and concentration | | | | | |
| My work involves difficult or emotionally charged situations or interactions | | | | | |
| I am expected to be available or respond to work outside my normal working hours | | | | | |
| I receive conflicting instructions or expectations from different people | | | | | |
| I have to deal with a lot of administrative processes or obstacles to get my work done | | | | | |
| My workload or priorities change unexpectedly, making it hard to plan | | | | | |



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| | | | | | |
|---|---|---|---|---|---|
| my work | | | | | |

**Q12. Thinking about a typical working week, how often do the following apply to you in your organisation?**

| | 1 Never | 2 Rarely | 3 Some-times | 4 Often | 5 Very often |
|---|---|---|---|---|---|
| I have flexibility in how I carry out my work | | | | | |
| I can participate in decisions that affect my work | | | | | |
| I can count on my colleagues to support me when difficulties arise | | | | | |
| I receive clear information about what is expected of me in my role | | | | | |
| I receive useful feedback on the quality of my work | | | | | |
| My manager supports me and takes my concerns seriously | | | | | |
| I have access to learning and development relevant to my role | | | | | |
| I can see clear opportunities to grow within my organisation | | | | | |
| I feel safe to speak up, ask questions, or raise concerns at work | | | | | |

**Q13. Overall, how well does your organisation support you given the pressures of your role?**

*Select one*

- Very well: the support more than matches the pressures
- Well: the support is broadly adequate
- Poorly: the pressures often outweigh the support available
- Very poorly: I feel unsupported relative to what is expected of me



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## Section 5: Progression and development

*People define career progression differently. For some it means promotion. For others it means growing expertise, taking on new challenges, or being better recognised. These questions explore what it means to you and how well your organisation supports it.*

**Q14. In one or two sentences, what does career progression mean to you?**

*There are no right or wrong answers.*

**Q15. Which type of progression matters most to you this year?**

*Select one*

Broadening my technical skills across different areas
Deepening my expertise in a specialist area
Gaining external recognition (e.g. publications, patents, conference speaking)
Greater flexibility or autonomy in how I work
Increasing my influence or visibility within my organisation
Mentoring others or contributing to the growth of my team
Moving into a more senior technical role
Moving into management or leadership
Working on more complex or high-impact projects
Other (please specify)

**Q16. How clearly defined is your career path within your current organisation?**

*Select one*

- Very clear: I know exactly what progression looks like for me
- Somewhat clear: I have a general sense but it is not fully defined
- Unclear: I am unsure what progression looks like for someone in my role
- There is no visible career path for me here

**Q17. How fairly do you feel progression opportunities are allocated in your organisation?**

*Select one*

- Very fairly
- Fairly
- Unfairly
- Very unfairly
- I do not have enough visibility to judge

**Q18. Have you ever felt overlooked for a progression opportunity you deserved?**

*Select one*

- Yes, more than once
- Yes, once
- No
- I am not sure



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## Section 6: What would make a difference

*This final section looks forward. We want to understand what changes would most improve your experience and make your organisation a workplace you never want to leave.*

**Q19. Thinking about the next 12 months, which single change would most improve your experience at your current organisation?**

*Select one*

- Better compensation and benefits
- Better quality of management and leadership
- Better workload management
- Clearer career progression pathways
- Greater autonomy in how I do my work
- Greater flexibility in working hours or location
- More access to learning and development
- More meaningful feedback and recognition
- More visible impact of my work
- Stronger team culture and sense of belonging
- Other (please specify)

**Q20. How optimistic are you that your organisation could become a better place to work?**

*Select one*

- Very optimistic
- Fairly optimistic
- Not very optimistic
- Not at all optimistic

**Q21. More generally, what could your organisation do to make it a workplace where you would want to stay and grow?**

*All responses are completely anonymous.*



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## Section 7: About you

*A few final questions about your background. All responses are anonymous.*

**Q22. Which of the following best describes your current role?**

*Select one*

- Analog design engineer
- Application engineer
- Data specialist (data scientist, data analyst, data engineer)
- Design engineer (designer, electrical design engineer, electrical project engineer, electrical product engineer, product development engineer)
- Digital design engineer
- Expert in cybersecurity
- Machine learning engineer
- Maintenance technician (electrical technician, breakdown technician)
- Marketing engineer
- Operator / Inspector (machine operator, inspector, repair operator, general labourer)
- Process engineer (manufacturing (support) engineer)
- Process technician (manufacturing (support) technician)
- Robotic engineer (electrical automation engineer, controls and robotic engineer, control system engineer, PLC programmer engineer)
- Software engineer (controls and software engineer, software developer, solution engineer, computer software engineer)
- Supply chain expert / Logistics specialist
- System design engineer (complex ASIC, SoC, SiP, SoP)
- Test engineer (product test engineer, test engineer, Design For Test (DFT) engineer, associate test engineer, senior test engineer)
- Test technician (electrical test technician, environmental and life-time test technician, troubleshooter technician, quality technician)
- Other

**Q23. What is your current employment status?**

*Select one*

- Full-time employee



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Part-time employee

Apprentice

Intern

Other (please specify)

**Q24. How many years have you worked in the semiconductor sector?**

**Q25. In which country do you currently live?**

*European countries dropdown.*

**Q26. What is your gender?**

*Select one*

Man
Non-binary
Prefer not to say
Woman
Other

**Q27. What is your year of birth?**

*Select one*

1997 or later (Generation Z)
1981 to 1996 (Millennial)
1965 to 1980 (Generation X)
Before 1965 (Baby Boomer or earlier)
Prefer not to say

**Thank you for completing this survey.**

Your responses will inform a practical report for semiconductor employers and European policy stakeholders. The goal is to make the sector a better place to work.

*Results will be published in the ECDA DEI Report 2, published in August 2026.*



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# Annex D: Interview Protocol

*DEI Report 2: How do you create a workplace people where people want to stay and grow?*

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**Interview type:** Semi-structured qualitative interview

**Participants:** HR professionals who conduct exit interviews

**Duration:** 30 minutes

**Format:** Virtual

**Interviewer:** Nessa Maguire, EudaOrg, Work Package 2 Leader

## 1. Purpose

This protocol is for use by the interviewer conducting semi-structured interviews with HR professionals who conduct exit interviews with technical talent in the European semiconductor sector. The interviews form the second strand of DEI Report 2, alongside the broader anonymous survey of technical talent.

DEI Report 2 is produced by EudaOrg on behalf of the European Chips Diversity Alliance (ECDA). The report focuses on retention of technical talent in the European semiconductor sector and is guided by the central research question: how do you create a workplace people want to stay and grow in? It is designed to be practical and action-oriented, with findings intended to support semiconductor employers and policy stakeholders across Europe.

The interviews explore two connected research focuses:

**Focus 1:** The patterns HR professionals observe across exit interviews with technical talent, including the reasons most commonly given for leaving and whether certain groups leave at higher rates than others.

**Focus 2:** How organisations use exit interview findings, including who receives them, what decisions they inform, and what enables or prevents action on what is heard.

All findings will be reported at an aggregated level. Responses will not be attributed to named individuals or organisations.

## 2. Pre-interview communication

For guidance on conducting interviews, please consult the interview protocol guidelines in the DEI Mapping Methodology.

Interview invitation and scheduling

Subject: ECDA research - interview invitation

Dear [Name],



The European Chips Diversity Alliance has received funding from the European Education and Culture Executive Agency (EACEA) under project No 101140006.

I am writing on behalf of the European Chips Diversity Alliance (ECDA) to invite you to take part in a short research interview as part of our second DEI report.

The report focuses on retention of technical talent in the European semiconductor sector and explores the question: how do you create a workplace people want to stay and grow? As part of this research, we are conducting a series of interviews with HR professionals who conduct exit interviews. The interviews focus on the patterns observed across exit interviews with technical talent, and how organisations use those insights to inform their approach to retention.

The interview will be conducted virtually and will last 30 minutes. With your permission, we will use transcription to support accurate note-taking. The transcript will be used for research purposes only and will not be shared externally. All findings will be reported at an aggregated level and will not be attributed to named individuals or organisations.

If you are happy to participate, please reply with a few times that work for you and I will confirm a slot. Do not hesitate to get in touch if you have any questions beforehand.

If there are any accommodations that would help, please let me know.

Kind regards,

[Name]

[Position], EudaOrg

[ECDA website]

3. The interview

---

A. Opening script

*Approx. 3 minutes*

Good [morning/afternoon] [Name], thank you for making the time to speak with me today. My name is Nessa, and I am a researcher at EudaOrg. We are conducting this research on behalf of the European Chips Diversity Alliance.

The focus of our conversation today is retention of technical talent in the semiconductor sector. I am interested in what you observe through exit interviews, the patterns you see, and how that information is used within your organisation. There are no right or wrong answers.

With your permission, I will use transcription to support my note-taking. The transcript is for research use only and will not be shared. All findings from this research will be reported at an aggregated level and will not be attributed to you or your organisation by name.

The interview will last approximately 30 minutes. Are you happy to proceed?

B. Context

*Approx. 3 minutes*



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**[Must ask] Q1. To start, could you briefly describe your role and how exit interviews fit into your work?**

*Optional probes / follow-ups:*

- How frequently do you conduct exit interviews - roughly how many per year?
- Is there a standard process for exit interviews in your organisation, or does it vary?
- Who else in the organisation is involved in exit interviews?

C. What HR professionals observe

*Approx. 8 minutes*

**[Must ask] Q2. When technical talent leave your organisation, what reasons do they most commonly give in exit interviews?**

*Optional probes / follow-ups:*

- Are there reasons that come up consistently, regardless of role or level?
- Are there reasons that are mentioned less often, but that you think are important?
- Are there topics that rarely come up in exit interviews, but that you think play a role in people's decisions to leave?
- How do the reasons technical talent give compare to other employee groups?

**[Must ask] Q3. Do you notice any patterns in who is leaving - for example, by role, career stage, or background?**

*Optional probes / follow-ups:*

- Are there particular teams or functions where turnover tends to be higher?
- Do different groups tend to give different reasons for leaving?
- Have these patterns changed over time?

**[Must ask] Q4. Do you observe any patterns in relation to diversity - for example, by gender, nationality, or other dimensions?**

*Optional probes / follow-ups:*

- Are certain groups leaving at higher rates than others?
- Do people from different backgrounds tend to give different reasons for leaving?
- Is diversity something that comes up in exit interviews directly, or does it tend to emerge indirectly?

**[Optional] Q5. Is there anything important for us to understand about why technical talent leaves that does not always come through in formal exit interviews?**

*Optional probes / follow-ups:*

- Are there things that people mention informally that they do not say in the exit interview itself?
- Are there things that only become clear in hindsight, once someone has left?

**[Optional] Q6. Thinking about the semiconductor sector more broadly - do you think retention of technical talent is handled differently here compared to other industries?**

*Optional probes / follow-ups:*

- What do you think the sector does well?



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- Where do you think there is room to improve?

D. How findings are used

*Approx. 10 minutes*

**[Must ask] Q7. After an exit interview, where does the information go? For example, is it shared with anyone, recorded, or reported on?**

*Optional probes / follow-ups:*

- Who typically receives exit interview findings in your organisation?
- Is the information from individual interviews brought together in any way - for example, as a regular report or summary?
- Are there parts of what you hear in exit interviews that are harder to pass on to others?

**[Must ask] Q8. Can you think of an example where something you heard in exit interviews led to a change in how your organisation operates?**

*Optional probes / follow-ups:*

- What helped that happen?
- Are there situations where the findings pointed to something important, but it was difficult to act on? What got in the way?
- What would need to be in place for exit interview findings to have more impact?

**[Optional] Q9. If you were designing an ideal exit interview process from scratch, what would it look like?**

*Optional probes / follow-ups:*

- Who would be involved?
- What would happen with the findings?
- How would you know it was working?

E. Looking ahead

*Approx. 6 minutes*

**[Must ask] Q10. Based on your experience, what do you think would most help organisations in the semiconductor sector to retain technical talent?**

*Optional probes / follow-ups:*

- Is that something you think is within reach for most organisations, or are there barriers that make it difficult?
- What role do you think exit interviews could play in supporting retention?

**[Optional] Q11. If you could change one thing about how your organisation approaches retention, what would it be?**

*Optional probes / follow-ups:*

- Is that something that feels achievable from where you sit?
- What would need to change for that to happen?



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F. Closing script

*Approx. 3 minutes*

Thank you very much for your time today, [Name]. I have learned a great deal from our conversation and your perspective will be a real contribution to this research.

Before we finish - do you have any questions for me, or anything else you would like to add?

We will be in touch as the research progresses. If anything comes to mind afterwards that you would like to share, you are very welcome to get in touch.

4. Post-interview

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A. Follow-up email

Subject: Thank you - ECDA DEI research interview

Dear [Name],

Thank you for taking the time to speak with me on [date]. Your contribution to this research is much appreciated.

As a brief summary of what we covered:

- [Key theme 1]
- [Key theme 2]
- [Key theme 3]

We will keep you updated as the research progresses. If you have any further thoughts in the meantime, do get in touch.

Kind regards,

[Name]

[Position], EudaOrg

[ECDA website]

B. After each interview

1. Review the transcript promptly and note any corrections or clarifications while the conversation is fresh.
2. Record any immediate observations about themes or points of particular interest.
3. Note any follow-up actions, for example if the participant offered to share additional information or make an introduction.
4. Consider whether any adjustments to the protocol would improve subsequent interviews.



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