



GENERAL MEETING OF JULY 22 , 2025

Responses to written questions received from a shareholder

On July 9, 2025, Soitec received written questions from a shareholder who exercised the right provided under Article L.225-108 of the French Commercial Code. The questions received and the Company's responses are given below.

Question:

During an interview, the CEO stated that Soitec was benefiting from the growth of AI, but without selling to Nvidia. How is Soitec connected to this? Is it for Data Centers?

Response:

It is true that Soitec does not sell directly to Nvidia, which is a fabless company, meaning it has no manufacturing sites. Our direct customers are the foundries, which use our substrates to manufacture chips for customers like Nvidia.

However, Soitec fully benefits from the rise of AI, particularly in Data Centers and at the network edge (Edge AI), because our SOI (Silicon-on-Insulator) technology is well-suited to the critical needs of these markets:

- FD-SOI for low-power AI accelerators in Edge devices;
- Photonics-SOI for optical interconnects in Data Centers.

Question:

More generally, SOI technology was growing faster than the semiconductor market. Is this still the case, and do you have specific data?

Response:

During the presentation of our 2024-2025 fiscal year results in May 2025, Soitec confirmed that its addressable market is expected to grow by an average of +15% per year between 2024 and 2030, compared to an estimated annual growth of +10% for the global semiconductor market over the same period.

This outperformance is driven by the increasing adoption of SOI in several high-growth segments (Smartphones, Automotive, Edge computing, Photonics for AI and data centers), as well as the deployment of our product diversification strategy with compound materials, such as POI for 5G smartphone filters.

Question:

Setting aside competence, does the executive leadership have a strong grasp of SOI technology and its impact?

Response:

Soitec's executive leadership has a nuanced and strategic understanding of SOI technology and its role in the value chain. The company builds on more than 30 years of technological expertise, protected by a portfolio of nearly 4,300 patents.

This excellence is widely recognized: in March 2025, Soitec confirmed its top position among the most innovative mid-caps (ETIs) in France according to the INPI ranking, and rose to the 22nd position nationally, moving up three spots in just one year. This reflects the strong innovation momentum driven by all teams, including at the highest level.