

# EDAC CEO Forecast Panel - 2005

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President & CEO

The logo for Denali, featuring the word "Denali" in a stylized, cursive font. The letter "D" is red, and the remaining letters "enali" are blue.

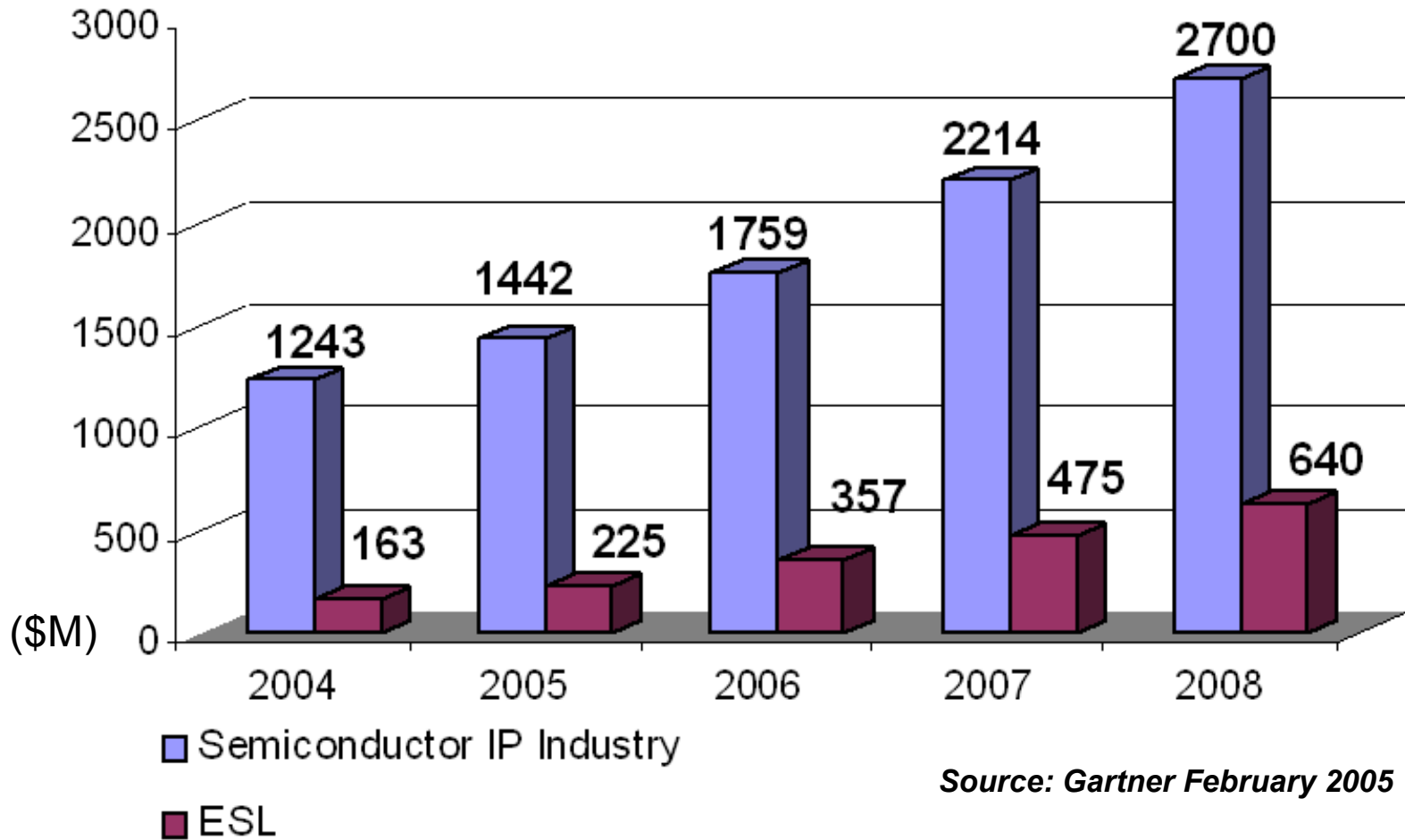
# Some Observations

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- DSM implementation challenges under control
- Lots of immediate unsolved problems in the front-end, especially ESL, IP, and Functional Verification

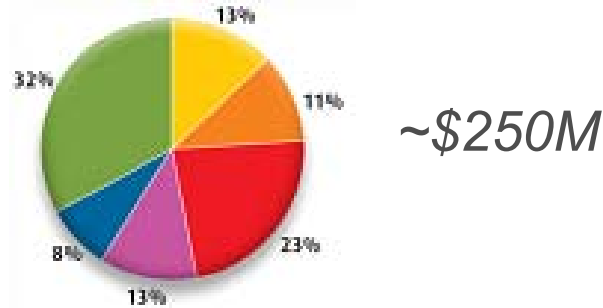


# Opportunities for Growth



# SoC Enablement Report Card

- Microprocessor IP
  - Grade = A



- Memory IP
  - Grade = A

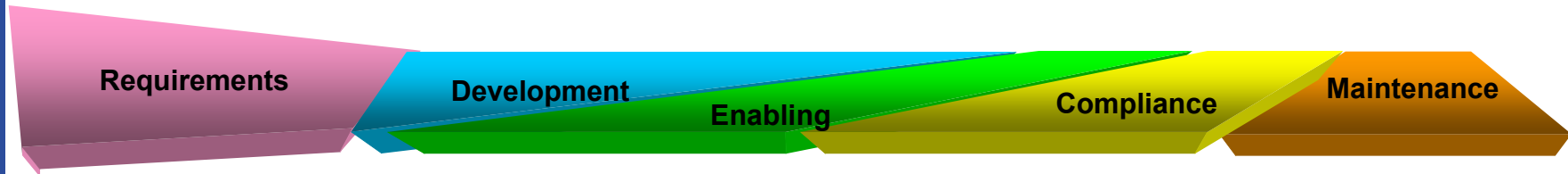


- Standard Interfaces
  - Grade = *incomplete*
  - *Lots of ingredients, but no “pie”...*



Denali

# PCI Express: *the first two years*



- Significant investments across the board:

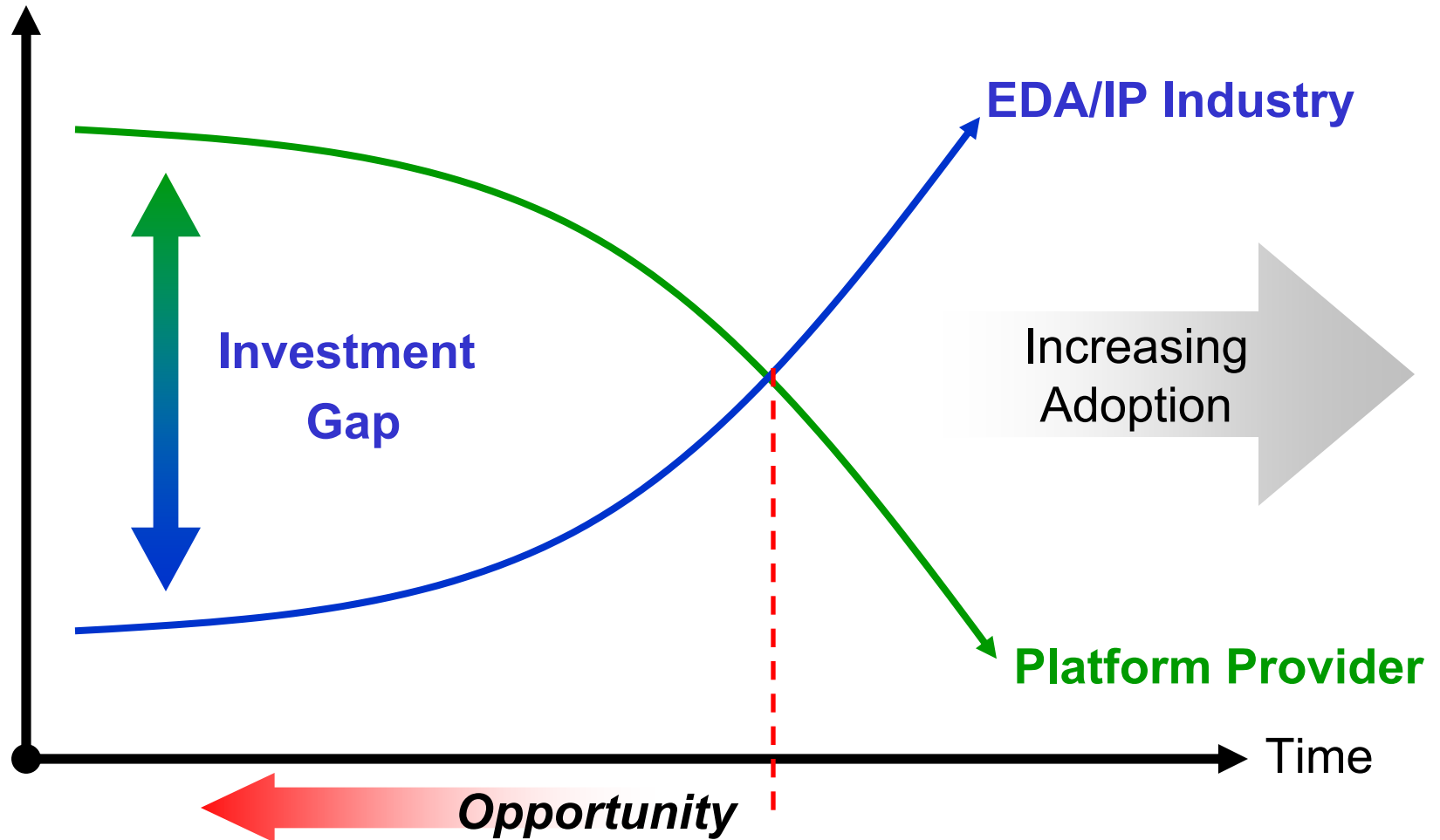
- architecture development, usability studies
- specifications: protocol, software, cable
- technical support, specification revs
- whitepapers, technical training, conferences
- technical marketing, collateral, branding,
- press, analysts, articles, websites, enablers
- compliance checklists: system, card, electrical
- protocol tests, hardware, and test procedures
- compliance workshops, plugfests

**Big \$'s**

and the PCI-SIG has a full calendar for '05...

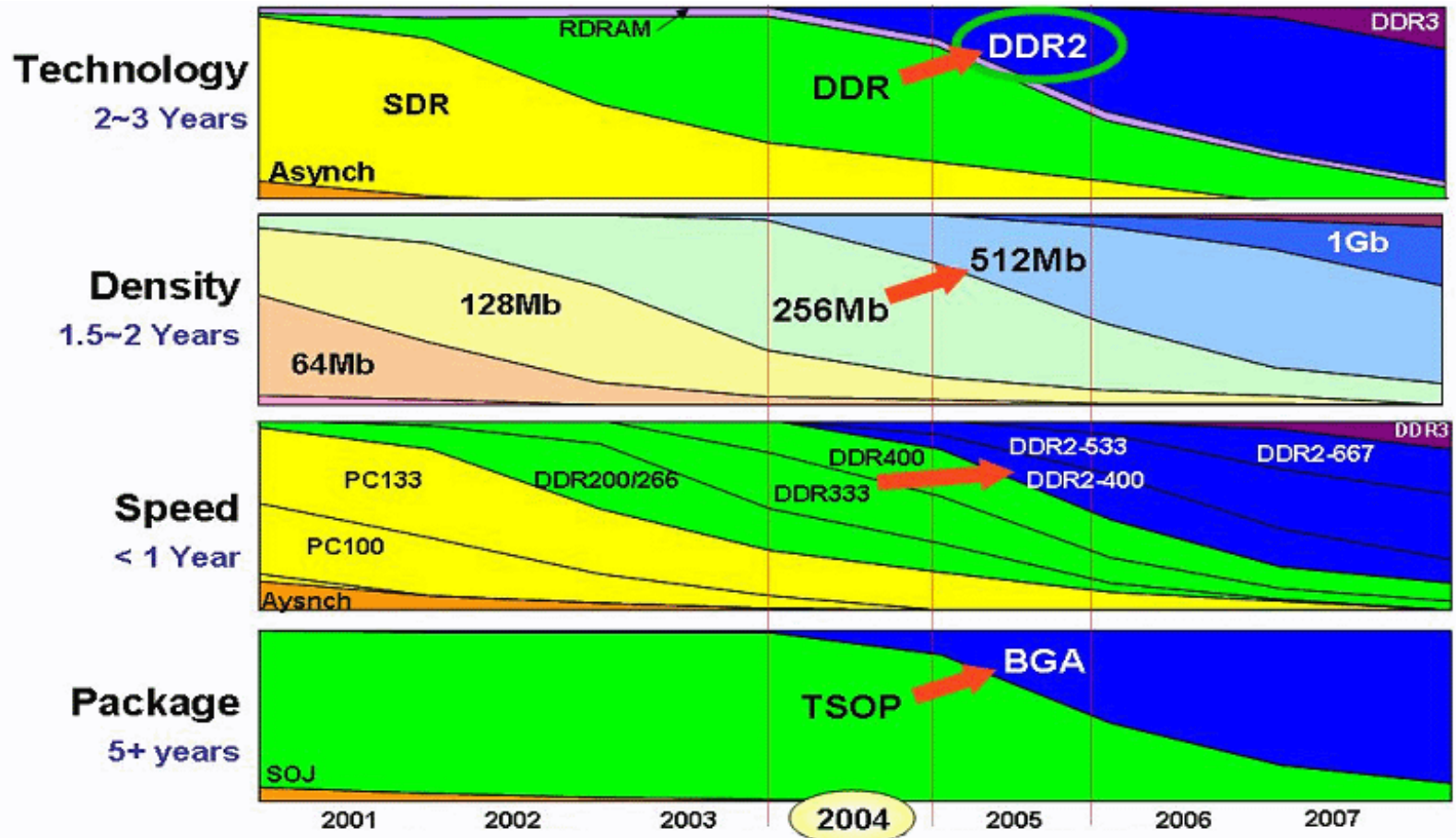
# What about Other Interface Standards?

Enablement Value



# Not-So-Standard Interfaces

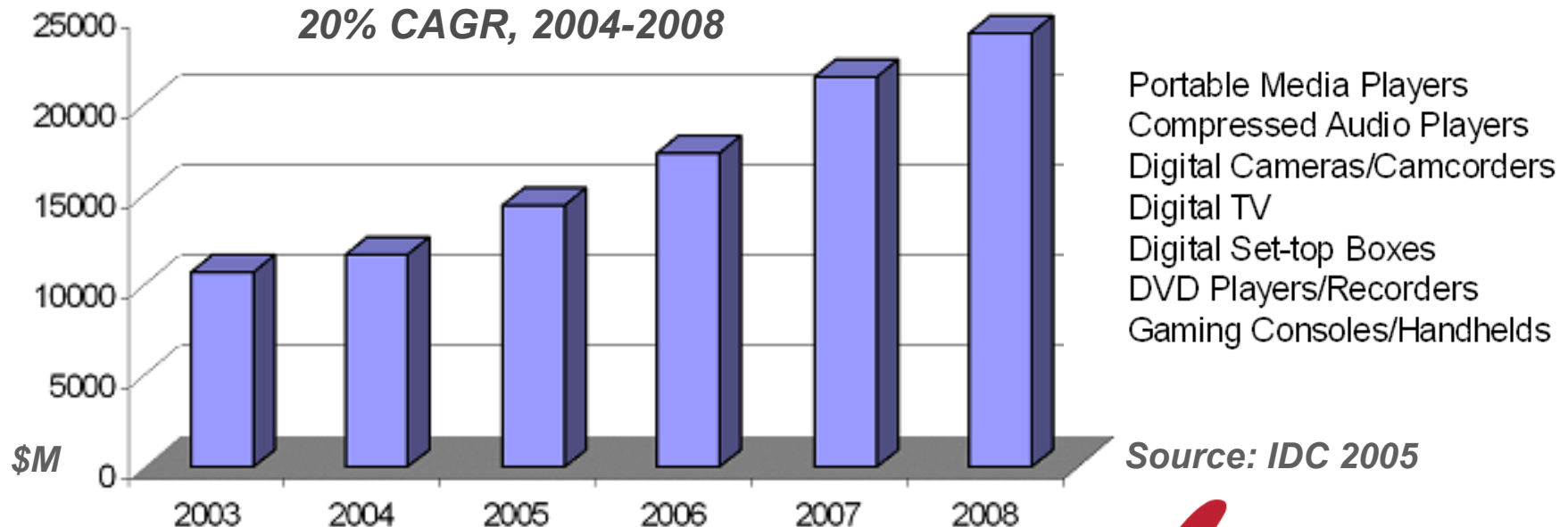
- “Standard” does not equal “Stable”



# Forecast

- New business models and companies emerge to serve interface enablement
- SoC verification crisis tracks  $1/(IP \text{ quality})$

## Digital CE Semiconductor Revenues



# Conclusion

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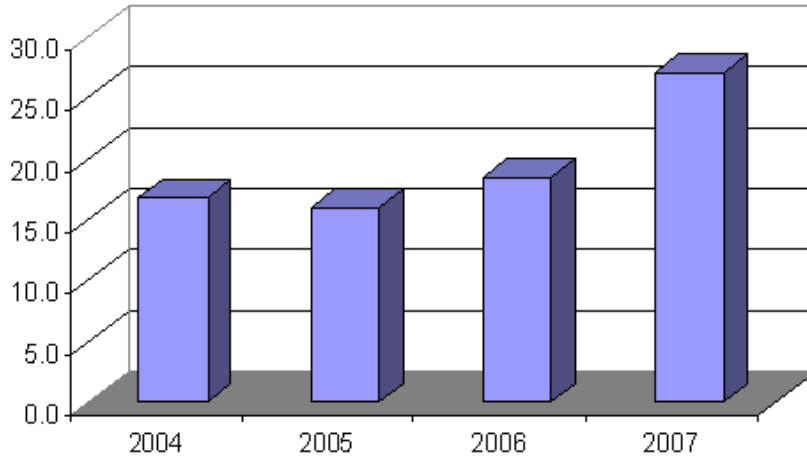
- On the verge of explosive growth
  - IP
  - ESL
  - DFM
  - Platform enablement
- Unsolved Challenges
  - Software productivity gap
  - Interface enablement
  - Channels for “per-design” IP



*Denali*

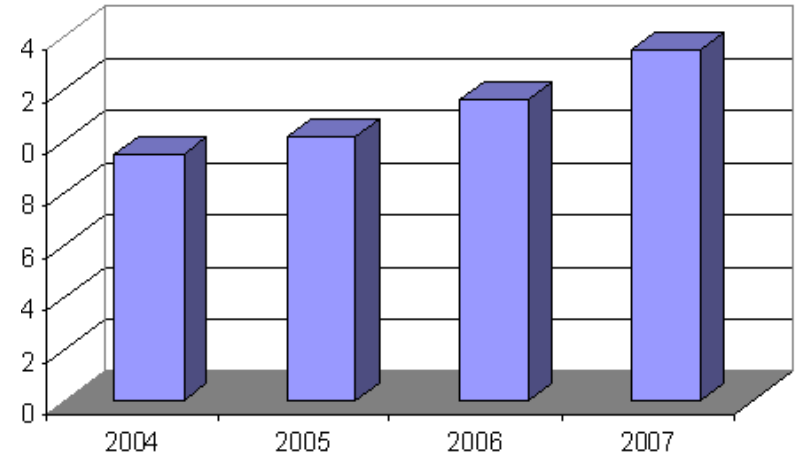
# CE Interface Enablement

*(\$B) FLASH*



Source: SemiCo, Webfeet, SIA

*(\$B) SFF HDD, ≤ 2.5"*



Source: IDC 2005

