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Competitive Re-Aggregation: Opportunities for EDA

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Business Session II

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Gartner Dataquest Competitive Re-Aggregation: Opportunities for EDA

Abstract

Semiconductor supply chain dis-aggregation or re-aggregation as the case may be, is influencing EDA tool purchase decisions. Outsourcing in the semiconductor industry is big business. The manufacturing outsourcing market serves integrated device manufacturers (IDM), fabless semiconductor companies and IP/cores vendors. Changes in the semiconductor industry and in the semiconductor supply chain thus have a strong influence on the EDA industry. For example the ongoing debate on COT vs. ASIC model is one. The rise of super IDMs, where ownership of the different pieces of the design chain is causing a change in the competitive edge is another. Gartner Dataquest is calling this the Competitive Re-Aggregation of the Semiconductor Supply Chain.

The user base is also changing. Gartner Dataquest user surveys and seat count surveys are consistently pointing to a long term shift in moving up a level of abstraction to the ES level. Embedded software is becoming an increasingly important part of the design. On the back end, IC Layout engineers are starting to incorporate more and more DFM tools into the flow because the technological barriers posed by manufacturability are holding up many a good design.

One of the big questions that EDA vendors are trying to address today is how to grow the market for EDA tools. In some ways the EDA market in 2005 is rather different from the market 10 years ago. For one thing, the market is much larger in terms of absolute revenue so high double digit growth rates are more difficult to achieve. Given all these changes in both technology and business conditions, where do we go from here.

Biography



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She is a research vice president with the Design & Engineering group in Semiconductors. She leads the research effort for the embedded software development tools and RTOS program and contributes to research efforts for ESL (electronic system level design tools), EDA (electronic design automation tools) and nanotechnology design. She has bachelor s and master s degrees from Cambridge University, UK and is a Fellow of the Cambridge Commonwealth Society.

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