



Joint EDA & IP Advisory Panels Meeting

Accellera, GSA, IEEE, Si2, SPIRIT

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Santa Clara, February 2nd, 2009



- **Lisa, Herb, Bill: Introductions, Misc updates**
- **Brian Matas: Semicond. Forecast 2009 & 10**
- **Shrenik Mehta, Steve Schulz, Gary Delp:**

Standards Activities and Plans

- **Herb: Standards Questionnaire**



EDA Standards Questionnaire

Joint Market Research Project

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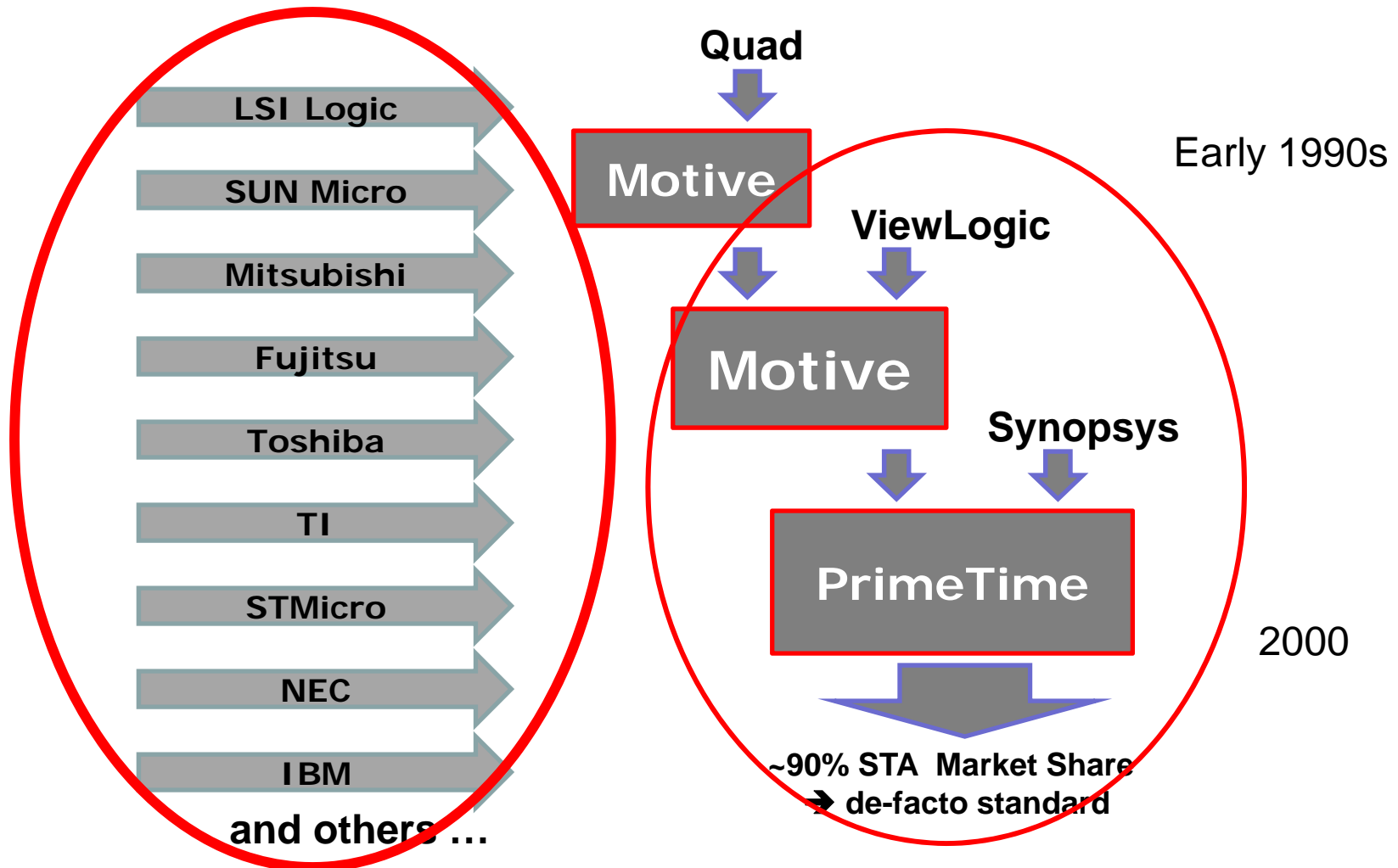
- **Both large and smaller Semiconductor Companies have expressed repeatedly that EDA Vendors don't support/comply with EDA standards and cause customers extra work and delays in tape-out schedules**
- **EDA vendors state that semiconductor companies are not engaged enough in the ongoing and planned EDA standards work**
- **The following slides outline some key inputs and suggest a "Standards Survey"**



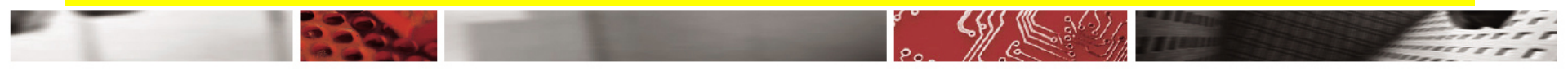
- **Utilize GSA's strengths** (large membership, neutral position, communication expertise...) **to better understand reality** & capture ideas
- The GSA's EDA/Design Advisory Panel will drive a market research project to
 - **capture** how the (lack of) **EDA standards impact(s)** IC Design productivity (TTM) and cost
 - **assess** members' **pains points and their ability to contribute more** to development of EDA Standards
- The **GSA will NOT duplicate** standards efforts



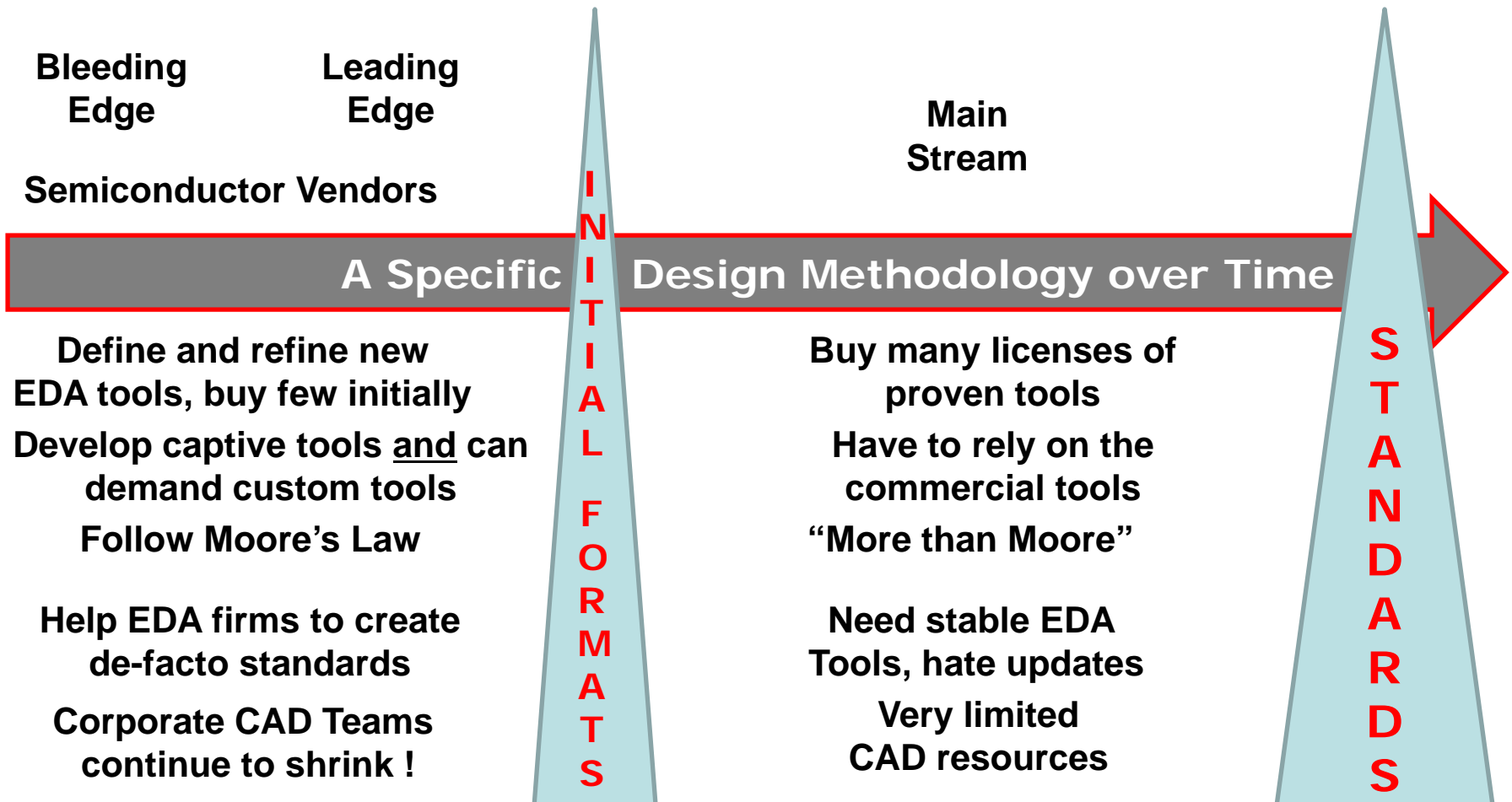
Example for Design Productivity



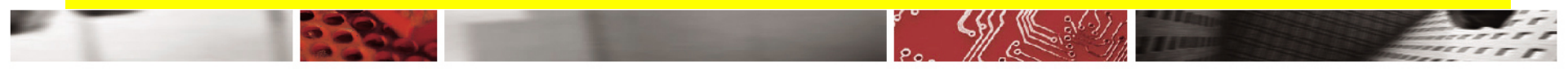
From '96 til 2000 Herb enjoyed excellent cooperation from semiconductor vendors to deploy first Motive, then PrimeTime as highly productive STA tools.

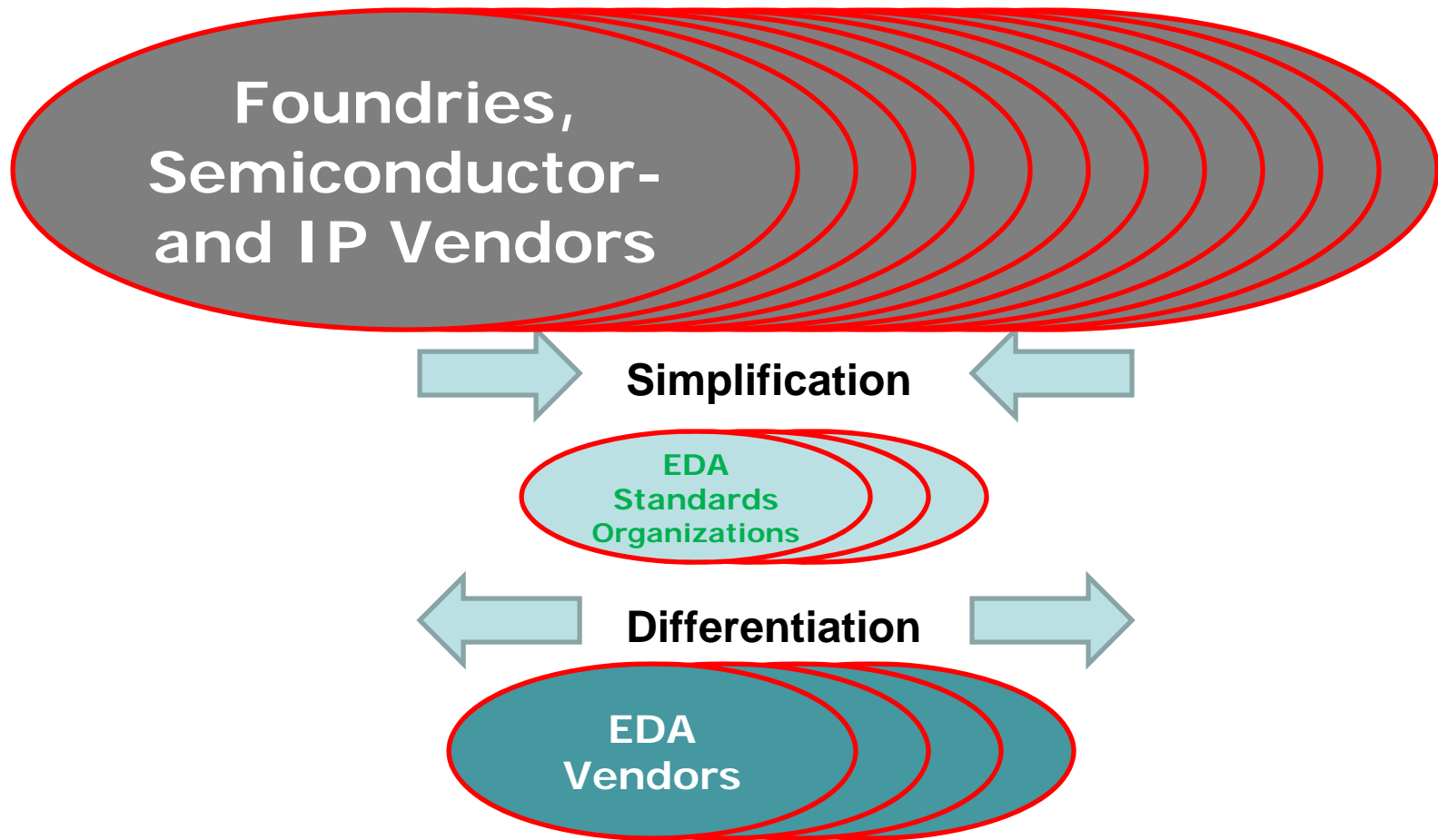


The Path to an EDA Standard



In the initial discussions with leading edge and mainstream semiconductor vendors Herb learned that both wants to see API's and formats frozen as soon as possible. It will accelerate tools deployment & EDA revenue ramp-up. Standards take years.





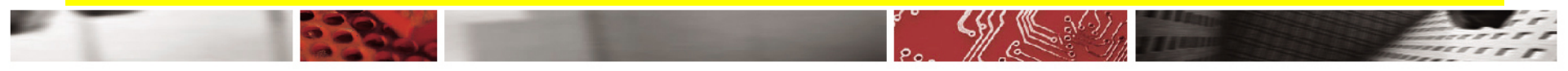
While EDA vendors want standards organizations' support to differentiate their tools, the EDA tools users expect standards to simplify (if not unify) tools & methodologies. By contributing more part-time resources and funding to the standards efforts, the tools' users can assure that the resulting standards will better meet their needs.

- **Global Economy will be in recession until ...?**
 - The **US consumers face a mountain of debt**
 - Semiconductor **revenues may drop \$ 50B** vs '08
- **Semiconductor mergers, layoffs and site closures reduce the EDA seat-count**
 - Same scenario for 3rd party IP vendors
- **Falling EDA revenues force cost reductions and have already triggered layoffs in EDA**
- **Less output will further reduce EDA revenue**
 - captive development, delayed orders, lower prices
- **Hope** (for a quick recovery) **is NOT a strategy!**



- **Expand the role** of standards organizations
 - Capture & address **“bleeding edge”** market needs
 - Establish **“Initial Formats”** as early as possible
 - **Broaden scope** to include **“more-than-Moore”**, IP, above RTL, software development tools,...
 - Win more **part-time contributors from IC vendors**
 - Offer **EDA selection guide (“ROI”)** to tools buyers
 - **Publize standards news** widely and regularly
- **Cooperate** to offer best possible efficiency
 - **Minimize duplication** & conflicting standards work
 - Help IC designers to bridge standards differences

•) Based on Herb's initial conversations with many GSA members. The results of the Standards Questionnaire will give a more detailed and substantiated picture soon!



- Discuss at **GSA Panel mtg** on Feb 2 **goals & approach**
- Herb works with a small team to **draft questionnaire**
- **Interested and contributing parties** to review it
- Face-to-face meetings with a few **"beta" customers**
- **Announcements** of survey **in the trade press**
- **Wide distribution** to GSA Members (and others?)
- **Analyze survey result**, create & publish summary report
- **Derive suggestions** from it and **implement as practical**
- **Quarterly progress reports** to interested parties



- Lengths of the general survey: ~ **10 min**
- Face-to-face meetings with key customers
- Bulk mailing addressed to **CTO/VP of Eng.**, with a request for a working-level contact
- Use database of all interested parties



- **Function & contact info of person responding**
- **Company size (revenue/y, people), location**
- **Business purpose and model**
 - **IDM, fab-less /fab-light, foundry, IP vendor, other**
- **Number of tape-outs /year, avg complexity**
- **Feature sizes in use now, ...in two years**



Thank You !

Next: Discussion

