

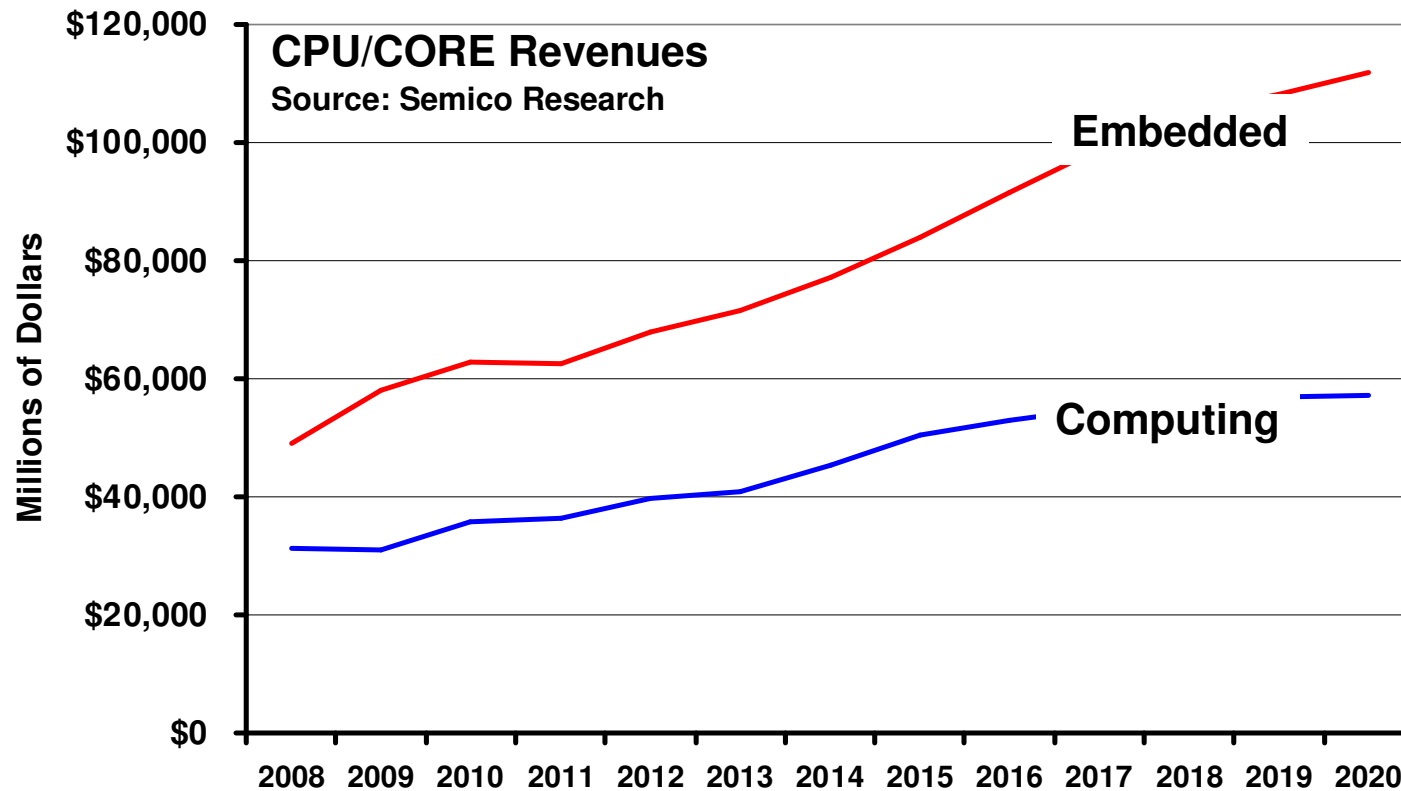
Consulting and Training

The Evolving Supply Chain

Phil Casini
Managing Partner



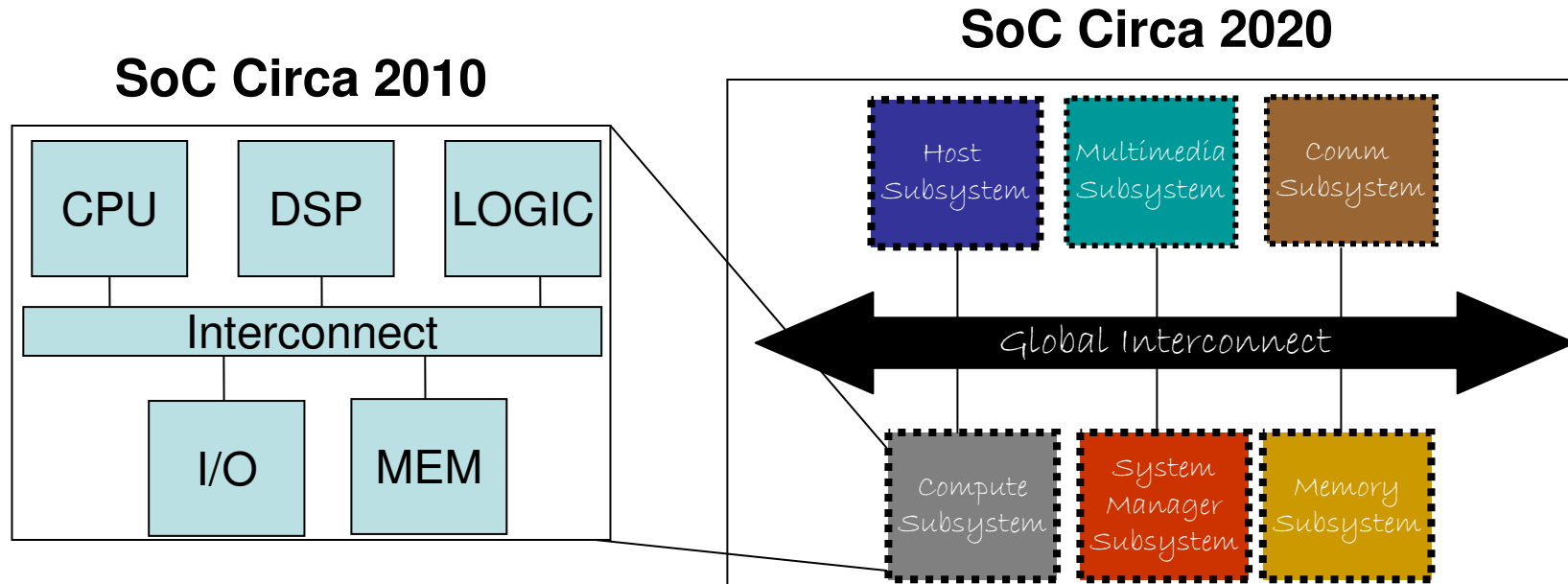
Embedded Systems “Counting” More and More



Supply Chain MUST Become More Efficient



Effect on SoC Evolution



- **More System Integration Creates the Need for “Outsourced” Subsystems (Not Just IP Building Blocks)**
- **SIP Vendor’s Role/Value Will Change**



Continuing Trends to Watch

- “Strategic” SIP Supplier-Buyer Alliances
 - Quantifying the “value” of IP is now key
- Emergence of SoC Subsystem IP
- Migration to Standards for Infrastructure Integration
- Emergence of S/W integration services as a key supply chain provider

GSA Provides The Visibility You Need !