

FUTURE HORIZONS

Presents

The European Fabless Semiconductor Report



2009 Edition

Annual Analysis Of The European
Fabless, Chipless & High-Level
IC Design House Industry

Future Horizons

The European Fabless Semiconductor Report 2009 Edition

Annual Analysis Of The European Fabless, Chipless & High-Level IC Design House Industry

- ❑ **European IC Design House Phenomenon**
- ❑ **IC Design House Industry Drivers**
- ❑ **IP Market Development**
- ❑ **IC Design House Market Segmentation**
- ❑ **IP Portfolios & Design Skills Analysed**
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Future Horizons

www.futurehorizons.com ♦ **e-mail: mail@futurehorizons.com**

Future Horizons Ltd, 44 Bethel Road, Sevenoaks, Kent TN13 3UE, England

Tel: +44 (0)1732 740440 • Fax: +44 (0)1732 740442

Affiliates In Europe, India, Israel, Japan, Russian, San Jose California, USA

In Russia, Call Future Horizons' wholly-owned subsidiary East-West Electronics, Moscow, Russia Tel +7 495 228 0766

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The European Fabless Semiconductor Report

Foreword

The **2009 Edition** of the **European Fabless Semiconductor Report** (previously known as the European Chipless & Fabless IC Design House Report) is the most comprehensive analysis of the **European Independent IC Design House Industry** and its importance in the **European Electronic Product and Semiconductor Market**.

This **unique report** focuses on **Europe** and **European IC design expertise**. It highlights the considerable number of independent companies that supply the **key enabler**, allowing **European system companies** to achieve **early market entry** and **leading edge product performance**. The **strength** of the **IC design expertise** in **Europe**, is one of the **semiconductor industry's best-kept secrets**, and partially **balances the influence** of the trend towards **foreign ownership of European wafer manufacturing**.

Now in the **System-on-Chip (SoC)** era, system and semiconductor companies alike are increasingly challenged to find both the **knowledge and resources** necessary to achieve the **mammoth task** of **managing and designing** the complex ICs, and are increasingly resorting to **outside expertise**.

This report is essential for those planning the resources of subcontracting new product design in the semiconductor industry, and those involved in the final system end product. It will also prove invaluable for authorities and government departments in planning and directing economic growth, as well as companies seeking to invest in Europe.

Future Horizons was established in April 1989 by Malcolm Penn, previously Director of European Research with Dataquest. It provides market research, technology and design evaluation, training and other business support services for use in opportunity analysis, business planning and new market development. Its competence spans the world-wide electronics and IT industries and the European market environment. **Future Horizons**, together with its wholly owned Moscow-based subsidiary, **East-West Electronics**, is widely recognised as the world's leading authority on the former USSR and East European electronics market.

With more than 100 man-years experience in the semiconductor and related industries, **Future Horizons** offers access to experienced industry veterans, each in a different aspect of the worldwide electronics and IT industries. In addition, **East-West Electronics** offers direct access to the Russian and Newly Independent States electronics industry and markets.

Each year, **Future Horizons** hosts its renowned '**International Electronics Industry Forum** (May) and '**International System & SoC Forum** (October)

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Foreword

aimed at fostering opportunities for co-operation in the global electronics OEM, IDM, foundry, fabless and chipless worlds, and **widely regarded as best in class**.

In addition, its international affiliation with **Pathfinder Research** in the USA and **Semicon Research** in Japan, enables **Future Horizons** to offer a complete programme of European and worldwide semiconductor market research, consulting and training services.

We look forward to working with you on your market research and business development needs.

Malcolm Penn
Chairman & CEO
Future Horizons

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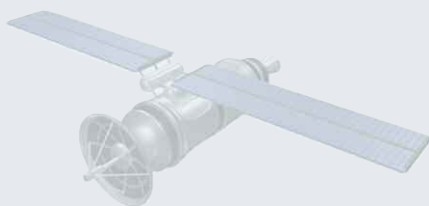
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Malcolm Penn is the founder and CEO of Future Horizons, with over 45 years experience in the electronics and semiconductor industry. He has worked extensively throughout Europe as well as in the United States, the former USSR, Japan and Korea, and was an early pioneer of pan-European research and product development collaboration in the 1970s during his tenure with ITT Europe. His industrial experience has involved him with all aspects of the management, manufacturing, marketing and use of electronic components, particularly semiconductor devices.

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US Affiliate:

Pathfinder Research

13901 North 73rd Street, Suite 205
Scottsdale, Arizona 85260, USA
Tel: + 1 480 348 1133
Fax: + 1 480 348 9745
hfeeney@pathfinder-research.com

Israel Affiliate:

Amir Ben Artzi Content & Media

40 Derech Hayam St.
Havatzelet Hasharon, 42937 Israel
Tel: + 972 73 7367966
Fax: + 972 9 8665799
amir@amircm.com

Russian Affiliate:

ELINT

6th Floor, 40 Bldg
1, 3y Proezd Maryinoy Roshchi
127018 Moscow, Russia
Tel: +7 459 228 0766
Fax: + 7 495 787 3869
elintsp@mail.ru

Indian Affiliate:

**Pradeep Chakraborty PC
Mediaworks**

Tel: +91 99451 27632
pradeepchakra@gmail.com

European Affiliate:

GMC Suisse

Ch. de la Dauphine 20
CH-1291 Commugny
Switzerland
Tel: + 41 22 349 0939
wladek@grabinski.ch

Far East Affiliate:

Semicon Research Ltd

Kagami Ishi Bldg., 1-11-7, Bunkyo-Ku
Yushima, Tokyo 113, Japan
Tel: + 81 3 5684 3941
Fax: + 81 3 5684 3943
o_ohtake@semiconresearch.com