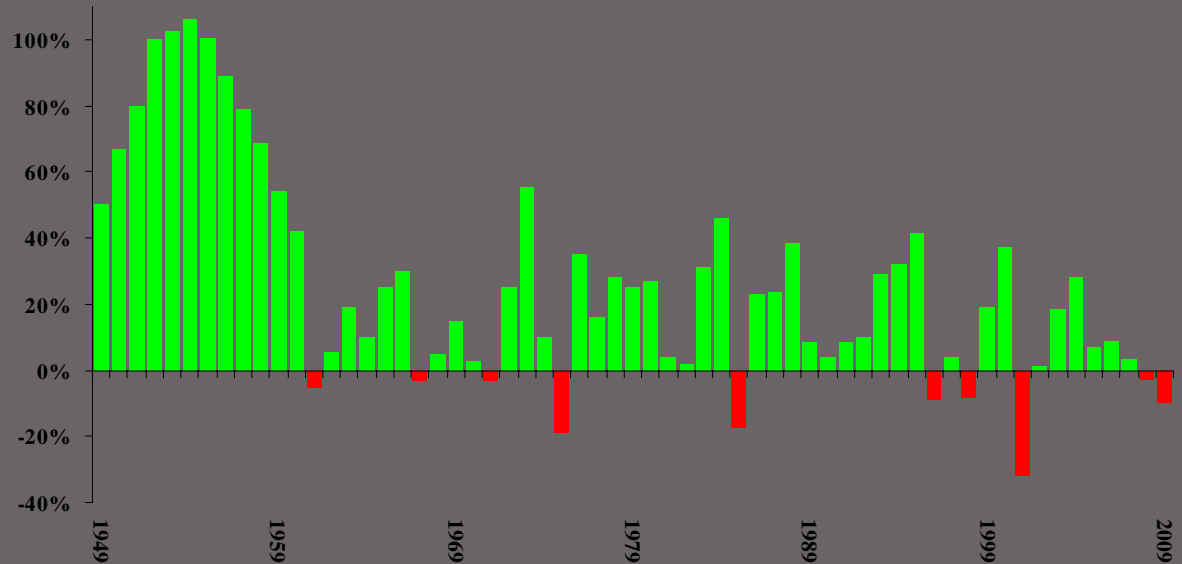


# Your Passport To Future Horizons

## Making Sense Of The Industry 'Tea Leaves'

- ◆ The Economy
- ◆ Unit Demand
- ◆ Fab Capacity
- ◆ ASPs



*The Global Semiconductor Industry Analysts*



# *Future Horizons Chronology & Background*

- ◆ 1989 - Established Operations In Europe
- ◆ 1991 - Established Research Operations In Moscow
- ◆ 1998 & 2000 - Major Research Expansions
- ◆ Worldwide Semiconductor Industry Focus
- ◆ Proprietary East & West European Industry Database
- ◆ Market Research, Industry Analysis & Training
- ◆ Custom Consulting, Marketing Studies, Due Diligence
- ◆ Business Development Opportunities & Contacts
- ◆ Off-The-Shelf Research Reports & Industry Intelligence/Analysis
- ◆ Bespoke Research Assignments - From Proof Of Concept To Full Market Development
- ◆ Due Diligence Analysis - From Seed Funding Through IPO
- ◆ Competitive Benchmarking & Positioning - From the Basic IC Design & Technology Up
- ◆ Unique Combination Of Chip Design Know-How With Market & Business Insight

**Global Organisation, Headquartered In Sevenoaks, Kent, UK**

Regional Offices In The UK & Russia

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

# Research Team

**Malcolm Penn**

(Venner, ITT SC, ITTE,  
Dataquest)

Chairman & CEO  
SC Industry Analysis &  
Executive Support

**Mike Bryant**

(HP, Fujitsu, Westell,  
Soundcraft)

Chief Technology Officer  
IC & System Design  
Analysis & Support

**Gemma Fabian**

Chief Operating Officer  
Operations Management  
Events & Forums  
Client Support

**Sergey Orlov**

Research Analyst  
Russia/CIS Operations  
Business Opportunity  
Development

**Jean Evans**

Administration Assistant

**Paula Gilzean**

Company Secretary

**Over 143 Man-Years Of SC Industry Experience ...  
(From 1962 & The First Commercial IC)**

**No Other Analyst Has This Depth Of Experience**

# *Malcolm Penn* (Founder) Chairman & CEO

- 1989      Founded Future Horizons (Industry Analyst)
- 1982-89   Founded Dataquest Europe (Market Research)
- 1980-82   System House (ITTE Component Engineering)
- 1970-80   ITT Semiconductors (Logic, DRAM, ASSP)
- 1966-70   Electronic System Design (Test & Measurement)
- 1962-66   Electronics Degree (London University)

**45+ Years Experience In The Electronics Industry**

## Future Horizons Since 1991

(Incl Work For European Commission As External Expert Project Reviewer)

### **Soundcraft**

Professional audio mixing equipment using high-performance DSP/24 bit A-D and D-A, with Ethernet, ATM, USB, Firewire, Bluetooth, ADAT and TDIF interfaces

### **Westell**

ADSL and HDSL modems, high performance ATM switching & network interface cards, SNMP based management system (DSLAM)

### **Fujitsu Microelectronics**

Analogue & Digital VLSI ICs For ISDN, Voice Data Compression, X.25, Frame Relay Controllers & Telecommunications Systems / HDL & Logic Synthesis

### **Hewlett Packard, Telecommunications Division**

Audio & PCM Test Equipment/ Large-Scale System Performance Monitoring S/W

**40+ Years Experience In The Electronics Industry**

## Future Horizons Since 1991

2001 - Marketing & Commercial Director of Electronintorg,  
Future Horizons' Russian Affiliate

1993 - Executive Director East-West Electronics, a wholly-owned  
subsidiary of Future Horizons

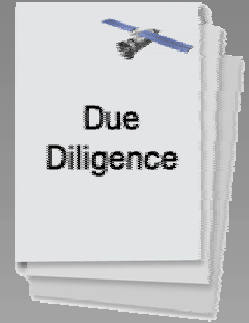
1991 - Future Horizons Account Manager

1989 - Amsoinvest Project Manager, one of the first Joint Venture  
companies in the former USSR

Previously Medical Doctor (Specialising In Dermatology)

**15+ Years Experience In The Semiconductor Industry**

# Future Horizons Organisation & Products



- ◆ Market Research Reports - *Covering Basic Industry Statistics*
- ◆ Dedicated Studies - *For a More Focused Analysis*
- ◆ Industry Networking Events – *With Key Industry Executives*
- ◆ Monthly Newsletters - *For The Latest News & Information*
- ◆ Dedicated Research - *For Added Insight & Analysis*
- ◆ Flexible Resource Support - *A Few Hours To Custom Study*
- ◆ Clearly Defined Objectives - *You Get Exactly What You Want*
- ◆ Controlled Budget - *Pay Only For What You Want*
- ◆ Insight & Analysis - *From Seasoned Industry Veterans*

# Research Reports



- ◆ Full Analysis Of The Key Worldwide Semiconductor Application Markets
- ◆ Complete Reference Source On The European Semiconductor Industry
- ◆ Market Data & Analysis By Product & End Market Segment
- ◆ Detailed Analysis Of The European Fabless Semiconductor Industry
- ◆ Monthly Industry Analysis To Keep In Touch With The Underlying Trends
- ◆ Fraction Of The Cost of Service Type, Subscription Alternatives
- ◆ Convenient Report Format – E-Mail (PDF), Printed (Binder) Or CD-ROM



# Industry Workshops & Training

**FutureHorizons**  
The Global Semiconductor Industry Analysts

**"The Silicon Chip" Industry Training Seminar**  
A One Day Interactive Seminar To The Semiconductor Industry Technology, Manufacturing and Markets

**Future Horizons**  
The Global Semiconductor Industry Analysts

**"The Silicon Chip" Industry Training Seminar**

Discover a new insight into the semiconductor industry. This seminar is essential for anyone involved in the semiconductor industry and getting your finger into the pulse of the world's most important technology. This seminar is essential for anyone involved in the semiconductor industry and getting your finger into the pulse of the world's most important technology. This seminar is essential for anyone involved in the semiconductor industry and getting your finger into the pulse of the world's most important technology.

**15 March**  
**07 June**  
**06 September**  
**22 November**

**FutureHorizons**  
The Global Semiconductor Industry Analysts

**2010 Industry Forecast Seminar Mid-Term Update**  
Connected About The Industry Outlook for 2010: IT and Beyond?

**Future Horizons**  
The Global Semiconductor Industry Analysts

**2010 Industry Forecast Seminar Mid-Term Update**  
Connected About The Industry Outlook for 2010: IT and Beyond?

**2010 Market Outlook**  
- Strategic Focus Analysis  
- 2011 Industry Outlook  
- What May Not Be Industry Out  
- Industry Segmentation: Drivers  
- IT Outlook & Forecast  
- Market & Revenue  
- Major Technology Trends  
- European Outlook & Future Outlook

**Thursday July 15, 2010**  
2010 London (Olympic Venue), London, England

**FutureHorizons**  
The Global Semiconductor Industry Analysts

**"The IC Economics" Industry Training Seminar**  
A One Day Interactive Seminar To The Economic Performance Of The Integrated Circuit Industry

**Future Horizons**  
The Global Semiconductor Industry Analysts

**"The IC Economics" Industry Training Seminar**  
A One Day Interactive Seminar To The Economic Performance Of The Integrated Circuit Industry

The seminar is a unique opportunity to gain insight into the industry's economic performance and to understand the challenges and opportunities facing the industry. This seminar is essential for anyone involved in the semiconductor industry and getting your finger into the pulse of the world's most important technology.

**16 March**  
**08 June**  
**07 September**  
**23 November**

**FutureHorizons**  
The Global Semiconductor Industry Analysts

**Events Management Workshop**  
This One Day Interactive Workshop Will:

**Future Horizons**  
The Global Semiconductor Industry Analysts

**Events Management Workshop**  
This One Day Interactive Workshop Will:

- Show you how to manage your events to the right standard
- Offer you insight into the global events market
- Provide you with the latest industry news
- Allow you to ask the most relevant questions
- Meet the industry's leading experts
- Gain a unique insight into the industry's economic performance

**09 March**  
**18 May**  
**21 September**  
**13 November**

**Silicon Chip:**  
15 March  
07 June  
06 September  
22 November

**Industry Forecast:**  
27 January  
20 July

**IC Economics:**  
16 March  
08 June  
07 September  
23 November

**Events Management:**  
09 March  
18 May  
21 September  
13 November

*London, UK - All Seminars Can Be Held In-House If Preferred  
(Please Call For Details)*

# Industry Forum

## 19<sup>th</sup> Annual International Electronics Forum IEF2010 – Dresden, Germany Hilton Hotel, 5-7 May, 2010

- High level speakers and participants from across the globe
- Covers the key issues effecting the semiconductor industry
- Includes Business-To-Business Speed Networking
- High quality information and insight from discussion panels
- Debate issues with world leading experts
- By gathering top industry executives in one place at one time this Forum maximises productivity and delegate ROI

- ◆ Help Shape & Influence The Future Industry Direction
- ◆ Share Views & Opinions With Industry Peers
- ◆ Informal Networking & New Business Opportunities
- ◆ Interactive Panel Discussions, CEO Interview & Keynote Presentations

**Plus the Latest Market Forecasts From Future Horizons**

# New For 2009 - SME/Start Up Support Service

*Too Busy ... Too Niche ... Too Stealth ... Too Knowledgeable ... Too Poor ...  
Too Soon ... Too Unnecessary ... Too Everything? ... Not Any More*

**Sign Up Now To Future Horizons SME/Start Up Option ...  
The Optimum Way To Feel & Tap Into The Industry Pulse  
Conveniently Packaged Into A Single Affordable Offering**

The screenshot shows the Future Horizons website interface. At the top, the logo reads 'FutureHorizons The Global Semiconductor Industry Analysts' with a satellite icon. Below the logo, the text 'FUTURE HORIZONS Presents' is followed by the service title 'Start Up/SME Company Support Service'. A list of bullet points describes the service's benefits, including access to reports, subscriptions, seminars, and business appraisal. The bottom of the page contains contact information and a small satellite graphic.

- ◆ Access To FH Annual Semiconductor & Key Applications Reports  
- for a database of industry/market statistics
- ◆ Global SC Monthly Report Subscription  
- to keep abreast of the industry outlook
- ◆ Report Site Licence  
- for information dissemination throughout your organisation
- ◆ Single Delegate Industry Forecast Seminar Attendance  
- in January and July
- ◆ Single Delegate Electronics Industry Forum Attendance  
- for top-level industry networking
- ◆ Initial Business Appraisal  
- for an independent market opportunity assessment
- ◆ Referral To Freshleaf Media & EML  
- for corporate web design and PR support
- ◆ Potential Investors & Media Contacts  
- for business development support

*All This For Just UK£3k/€4.8k Per Year (£250/€400 Per Month)*



# *New For 2009 – B2B Speed Networking Event*

**“Speed Networking is very good, rapid way to meet many people in a short period of time”** Sophia Business Angels, IEF2009 Delegate

## **Benefits**

- ◆ The main purpose of the speed networking is to meet lots of new contacts in a short space of time saving you valuable time and money
- ◆ Within a few minutes you can decide if there is a possibility of a business relationship
- ◆ If you take into account each participants business contacts, you are potentially connecting with hundreds of relevant industry people
- ◆ Increases your networking profile within the industry
- ◆ People like to do business with people they have met and like
- ◆ The informal format takes the awkwardness out of traditional networking, it is a fun and easy way to meet a wide variety of people

## **How It Works**

We will be running the networking session for approx 10-15 delegates, each person will spend 3-4 minutes (depending on final numbers) with each participant.

# *New For 2010 - Event Management Workshop*

## **This One-day Interactive Workshop Provides:**

- ◆ Step By Step Guide How To Create Successful, Dynamic Events
- ◆ Fresh Ideas & Sharpens Existing Skills
- ◆ Tool Kit to Create, Plan, Market & Evaluate Events With Finesse
- ◆ Increased Confidence As An Events Manager
- ◆ An Understanding Of The Importance Of Events In The Overall Marketing Mix
- ◆ Fully Packed With Real Life Examples, Interactive Activities & Theory
- ◆ Giving You The Confidence To Organise Any Event From Start to Finish



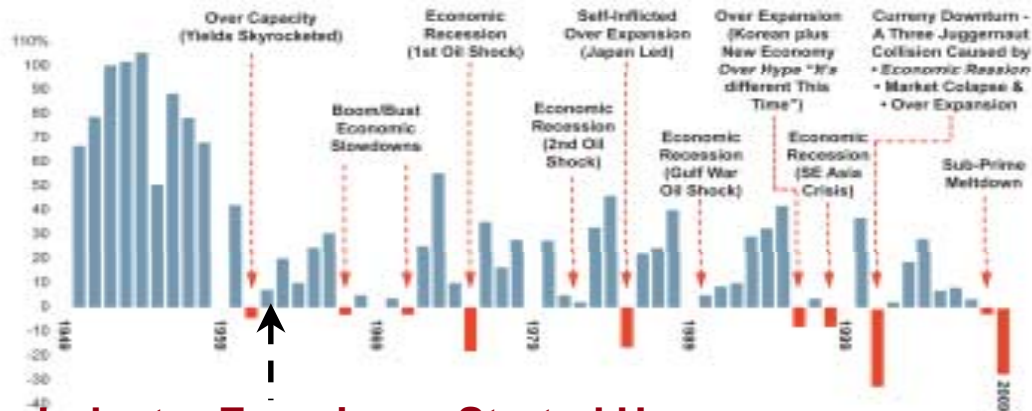
**Interactive \* Full Of Examples \* Practical Activities \* Theory \*  
Discussions \* Group & Individual Tasks**

**Make People Remember Your Events For The Right Reasons ...**

**Suitable For Anyone Tasked With Organising Company Events, **BIG** or small**

# Future Horizons B2B Triumvirate

## Semiconductor/Electronics Industry Analysis



**Our Industry Experience Started Here ...  
Longer Than Any Other Analyst AND Most Industry Execs**

### Web Design Partner

*Freshleaf Media Ltd*

1st Floor  
2 The Square  
Wimborne  
Dorset , BH21 1JA



Tel: +44 1202 847160  
Freephone (UK): 0800 075 8177  
<http://www.freshleafmedia.co.uk/>  
e-mail: [enquiries@freshleafmedia.co.uk](mailto:enquiries@freshleafmedia.co.uk)

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Surrey KT2 5BB



Tel: +44 208 408 8000  
<http://www.eml.com/contactus.htm>  
e-mail: [futurehorizons@eml.com](mailto:futurehorizons@eml.com)



**FutureHorizons**  
The Global Semiconductor Industry Analysts

Home Networking Seminars Consulting Reports Order Ask The Analyst Pressroom

### About Future Horizons

In the industry for the industry, Future Horizons, under the guidance of industry expert Malcolm Penn, has unrivalled knowledge and understanding of the semiconductor industry.

- ▶ 148 man-years of electronics experience
- ▶ Informative market briefings and training seminars
- ▶ Industry forums and networking executive lunches
- ▶ For full daily data listing visit our [Networking Page](#)
- ▶ Semiconductor start-up? Visit our [Start Up Support Page](#)
- ▶ Do You Organise Events? Visit Our [Approved Suppliers Page](#)

### Global Semiconductor Report

A CEO favourite, this monthly report is all a busy executive needs to keep in touch with industry trends. Receive your sample copy.

### Industry Reports & Consulting

Future Horizons publish off the shelf reports analysing key sectors of the semiconductor industry. Customer focused and diligence reports are also our speciality.

### Get In Touch

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E: [mail@futurehorizons.com](mailto:mail@futurehorizons.com)

Increase Staff Productivity Training Seminars  
Latest Industry Outlook Marketing Seminars  
New Business Opportunity Industry Forums

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