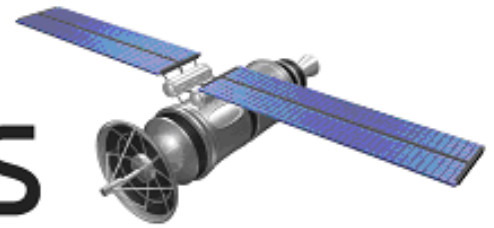


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The Global Semiconductor Industry Analysts

FH MONDAY

30 July 2018

Apple Could Face Deactivation of iPhones in India

The Telecom Regulatory Authority of India (TRAI) has warned the US smartphone maker Apple, that if it doesn't allow a TRAI's Do-Not-Disturb (DND) app on its phones, it would ask telecom companies like Airtel, Vodafone and Reliance's Jio to deregister iPhone from their networks.

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WiFi Going 6GHz

Engineers agreed to start work in May on a next-generation Wi-Fi standard that could provide up to a four-fold boost in throughput. The Extreme High Throughput (EHT) spec may be the first designed from the start to include support for the 6 GHz band and to put Wi-Fi standards on an accelerated release cadence.

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Silicon Labs to Launch M&A Binac

Silicon Labs is rising. The company reported on Wednesday that its second quarter set an all-time record, achieving "the high end of guidance at \$217 million, up from \$205 million in the first quarter." The company's IoT revenue increased to \$116 million, up 13% sequentially and 19% year-on-year.

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TALK TO US



Intel Aims to Drive Chiplet Standard

SAN FRANCISCO — Intel is weeks away from releasing a small but strategic piece of its proprietary packaging technology. It could become part of a future standard enabling a Lego-like design of SoCs out of chiplets.

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STMicro Sees Strong Demand for Silicon Carbide

As STMicroelectronics reported its first quarterly results since President and CEO Jean-Marc Chery took the helm, the company was bullish about its automotive market pipeline, and especially for its silicon carbide (SiC) products from which it expects revenues of \$100 million in 2018.

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

Tel: +44 1732 740440 • Fax: +44 1732 740442

e-mail: mail@futurehorizons.com • <http://www.futurehorizons.com/>

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

Apple Could Face Deactivation Of iPhones In India

BENGALURU — The Telecom Regulatory Authority of India (TRAI) has warned the US smartphone maker Apple, that if it doesn't allow a TRAI's Do-Not-Disturb (DND) app on its phones, it would ask telecom companies like Airtel, Vodafone and Reliance's Jio to deregister iPhone from their networks.

The two-year-old fight between TRAI and Apple over SPAM calls and messages has culminated into TRAI coming out with the Telecom Commercial Communication Customer Preference Regulation, 2018 which "proposes to curb the problem of unsolicited commercial communication," popularly known as spam calls and text messages. This provision that directly impacts Apple, calls for telcos to "derecognise" devices that - among other things - do not allow installation of an app developed by the regulator.

WiFi Going 6GHz

SAN JOSE, Calif. — Engineers agreed to start work in May on a next-generation Wi-Fi standard that could provide up to a four-fold boost in throughput. The Extreme High Throughput (EHT) spec may be the first designed from the start to include support for the 6 GHz band and to put Wi-Fi standards on an accelerated release cadence.

Developers hope the 6 GHz band is cleared by 2020 for unlicensed use that would include both Wi-Fi and cellular. Wi-Fi proponents aim to retrofit 802.11ax for 6 GHz by that time and have an enhanced 6 GHz implementation available with EHT by 2023.

The EHT initiative comes on the heels of disappointment over the longer than expected time it took to finish the latest Wi-Fi upgrade. The .11ax spec, just now coming to market in pre-standard versions, took more than four years to finish, one of the longest 802.11 projects to date.

Silicon Labs To Launch M&A Binge

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Separately, Silicon Labs announced two new executive appointments last week. It promoted Daniel Cooley, 35, who led Silicon Labs' IoT business over the last four years, to chief strategy officer — a corporate position that the company hasn't filled for a very long time. It also recruited Matt Johnson, a veteran executive from NXP Semiconductors. Johnson was senior vice president and general manager of NXP's product lines and software, auto MCU, and processors

Intel Aims to Drive Chiplet Standard

SAN FRANCISCO — Intel is weeks away from releasing a small but strategic piece of its proprietary packaging technology. It could become part of a future standard enabling a Lego-like design of SoCs out of chiplets.

The x86 giant is putting the final touches on a specification for its Advanced Interface Bus (AIB). AIB is a physical-layer block for the die-to-die connection in its dense, low-cost Embedded Multi-Die Interconnect Bridge (EMIB).

The company already licensed the spec to a handful of partners in a government research program. It aims to make AIB available royalty-free to anyone interested through a consortium.

STMicro Sees Strong Demand For Silicon Carbide

LONDON — As STMicroelectronics reported its first quarterly results since President and CEO Jean-Marc Chery took the helm, the company was bullish about its automotive market pipeline, and especially for its silicon carbide (SiC) products from which it expects revenues of \$100 million in 2018.

"We have more than 25 automotive projects in discussion, and 85% of these are in SiC," Chery said. "We are preparing our capital expenditure next quarter to support this, as SiC will be an important game changer for the industry."

Asked by analysts about his confidence level in growth in the automotive and industrial sector for ST, he said, "We don't see any weak signals, we are really confident as demand is really strong