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EE Times:

EDA pundits confront market projections for 2010

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Anne-Francoise Pele
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EE Times
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Joseph Borel, Catrene European EDA Roadmap


Joseph Borel
JB-R&D EDA consulting company

Joseph Borel, former executive vice president in central research and development at STMicroelectronics NV (Geneva, Switzerland).

Borel, now of the JB-R&D consulting company, co-wrote the *2009 European Roadmap for design automation in semiconductor products.*

EE Times: Will the EDA market stabilize in 2010?

Joseph Borel: I don't see any reasons why EDA market will stabilize in 2010 because EDA market by construction is not consolidated and that's a prerequisite for its stabilization at the required level.

What I mean is that there should BE NO stabilization but rather a significant move towards EDA industry standardization and more sharing of complementary industrial offers (e g new system level solutions to address design needs from system houses functional specifications to support their ramping up in the semiconductor market share).

The implementation way is the common adoption of an International EDA Roadmap, as there is an International SIA technology roadmap. The European CATRENE EDA Roadmap could play a role as a starting template of the work to be done.

I proposed a statement on this topic at the latest Design Automation Conference in San Francisco, Calif., that should be seriously and positively analyzed by the current EDA players, for their own benefit (including system houses, semiconductor companies, EDA companies and EDA startups).

EE Times: What will be the positive trends and negative trends?

Borel: A positive trend would be more dialog between EDA customers, including from one side customers —system houses and semiconductor companies— and from the other side suppliers —EDA vendors and EDA startups including tools and libraries with an emphasis on System Level Design and eSW with a specific attention to application using low cost and low power FPGA solutions.

There would a negative trend if that does not happen!

EE Times: Is it likely that the EDA pickup in revenues may not be until well in 2010, or even in 2011, when customers are certain that their markets have recovered?

Borel: Real pickup will occur only when EDA suppliers understand the above, their present business being still in the noise level!

EE Times: Should we expect more consolidations this year?

Borel: It will take at least five years to reach the above targeted level together with making available in parallel the new EDA tools needed for the 3D integration that could well see their industrial move slowing down the 3D product developments on the market.

A new DDA (Device Design Automation) level will become mandatory in this business. This is related to 3D Integration in terms of "Multiphysics Device Simulations" to study process variability and its impact on devices at the nanoscale level and then circuits variability

EE Times: Will big EDA companies (Cadence, Mentor, Synopsys, Magma) keep going or change course?

Borel: In my opinion, they will need to change course to cooperate more closely and share a much bigger cake than what it is today!

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