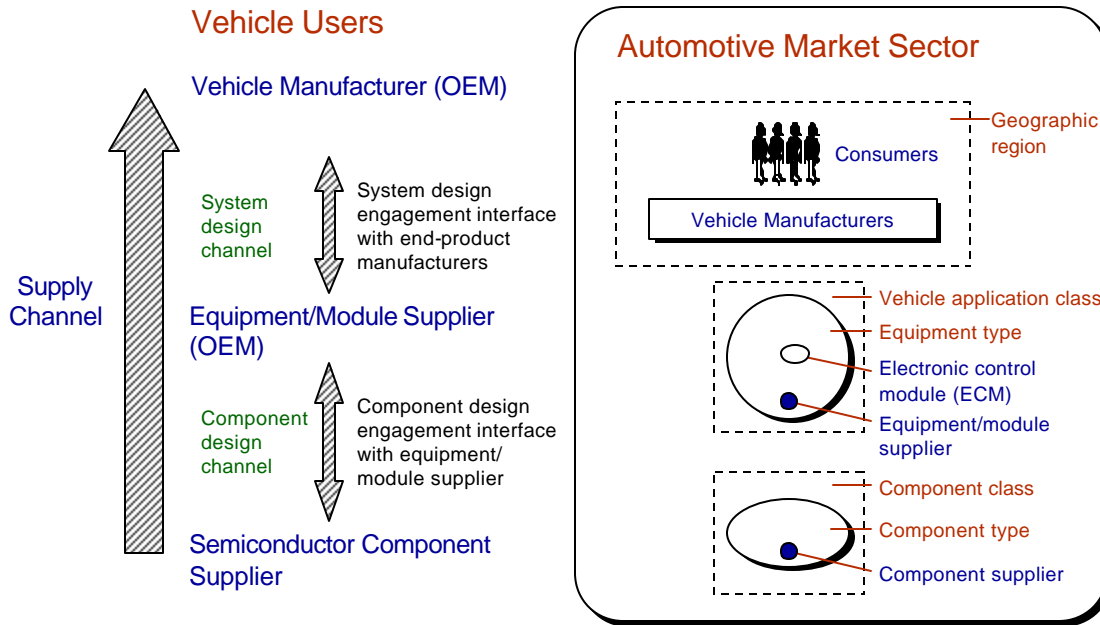


Fig.1 Automotive Market Sector—Analysis Blueprint



Study Focus Areas:

- IC design analysis focus is on mixed-signal ASIC (custom) and ASSP products (versus standard/generic off-the-shelf products)
- Supply channel analysis focus is on the IC design engagement interface between semiconductor component and electronic system/module suppliers
 - This interface serves as the channel for delivery of the end-system's semiconductor content
- System vendor analysis focus is on the large Tier 1 suppliers providing comprehensive end-system solutions directly to the vehicle manufacturers (VM)
 - These suppliers have first-hand insights into end-system applications and market requirements and technology trends
- IC supplier analysis focus is on mixed-signal semiconductor components and technologies

Six Overlays of the Automotive Market Map:

- 1. Market terrain data and trends (2002-2010)**
 - Vehicle production by geography, manufacturer, and brand
 - Equipment/module content by geography and application
 - Semiconductor content by geography, application class, and equipment type
 - Semiconductor content by geography, content class and component type
- 2. Equipment/module suppliers**
 - Supply channel position
- 3. Mixed-signal component suppliers**
 - Supply channel position
- 4. Equipment/module application and technology trends**
- 5. Mixed-signal semiconductor component and technology trends**
 - Design technology (methodology and tools)
 - Design engagements (turnkey, semicustom, COT)
 - Design implementations (CSIC, MCU, ASSP, SIP)
 - Manufacturing technology (fabrication, packaging, assembly, test)
- 6. Mixed-signal component design channel**
 - Attributes and interactions

Fig. 11 Anatomy and Classification of Automotive Semiconductor Content

