OPENING KEYNOTE ADDRESS

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<100nm...A Giant Leap for Mankind?

Moore's Law is predicted to continue its relentless pace for the next 15 or so years. By a series of small steps we have 100Mtr of ASIC capacity available today, and will have more than 1 billion within the next five years. The product opportunities presented by this opportunity will change our lives ... However with every new opportunity come some new challenges. Rapidly escalating mask charges and wafer fabrication costs will cause the shape of the semiconductor industry to change. The shake down of lead players focused on wafer foundry and others focused on IP building blocks will continue. The approach to total system design will need to change with verification and validation becoming the biggest bottlenecks.

Design, long considered as a negligible amortized cost, has started to compete with fabrication costs! But whilst fabrication costs are rising as a square law, design costs are rising with at least a cubic law! For an industry where FAB costs have dominated, this shift of emphasis over the next few years will shake the foundations of our entire industry. What giant leap is required, how will the global landscape alter, what are the emerging applications and can we take advantage of all those available transistors?

Biography: Sir Robin Saxby was involved in the founding of ARM and served as Chairman, President and Chief Executive Officer since joining the company full-time in February 1991. In October 2001, he split the role of chairman and chief executive officer, becoming Executive Chairman while Warren East took on the role of Chief Executive Officer. Besides directing ARM, Robin was also appointed to the board of Giotel plc as a non-executive director in April 1999. Prior to this, he worked for five years for European Silicon Structures SA (ES2), where he was Vice-President of Northern Europe, Managing Director ES2 Limited and President of its USA affiliate US2. Between 1984 and 1986, Robin was Chief Executive Officer of Henderson Security Systems Limited and before that, spent eleven years with Motorola Semiconductors in a variety of sales, marketing and engineering management roles. His early career was in design and development with Rank Bush Murphy and PyeTMC. Robin also served as Chairman of the Open Microprocessor Initiative Advisory Group, a European Union panel set up to advise on collaborative R&D activity in Europe. In 2000, Robin was awarded an honorary Doctorate D.Eng from Liverpool University. He was also appointed a visiting professor to his old Department of Electronics at the University. In July 2001, he was awarded an honorary Doctorate D.Tech from Loughborough University. He was awarded a Knighthood in the 2002 New Year Honours for services to the Information Technology industry.