



COMMENT

A rebirth for the chip business?

If eco-initiatives are to haul the world out of the economic abyss, then the semiconductor industry will have its role to play in the recovery. Semiconductor technology is crucial to many economies' and individuals' plans to be more environmentally aware. So it is not unlikely that US president-elect Barack Obama will seriously consider a semiconductor specialist for the proposed new position of chief technology officer for the US.

Speaking at the launch of the Electronica trade exhibition in Munich last week, Brian Halla, CEO of National Semiconductor, said, "It needs to be someone from the semiconductor industry because semiconductors implement everything."

We also welcome Obama's decision to invest \$150bn over 10 years in renewable energy technologies. Halla agreed. "I think it's great he has a thirst to solve some of these problems," he said.

It is now becoming a popular belief that energy-efficient technology in the analogue semiconductor domain – and not digital processor technology alone – will create the next big growth cycle for the semiconductor industry.

According to Halla, you can feel it happening already. "There are some amazing things happening. Analogue will take us into the next upward cycle of the industry."

However, the big analogue semiconductor growth cycle will be different from the last few decades of digital processor-dominated growth.

With analogue, it is not about throwing more gates at problems, as Moore's Law would have the industry do.

"Analogue does not follow Moore's Law. Moore's Law is not about power efficiency, it is only about more transistors. There are smarter things for us to do now," said Halla.

Driving this upswing for IC demand will be markets in renewable energy, distributed healthcare, sensing and detection, electric vehicles and battery management, and personal mobile devices. So this eco-opportunity for the chip industry comes just as the industry's finances need a boost.

"The bloom has gone off the lily. All our share prices are below where they were 10 years ago," said Halla. "But the semiconductor industry is essential for everything. This spells a rebirth for the semiconductor industry." ●

"There are some amazing things happening. Analogue will take us into the next upward cycle of the industry"

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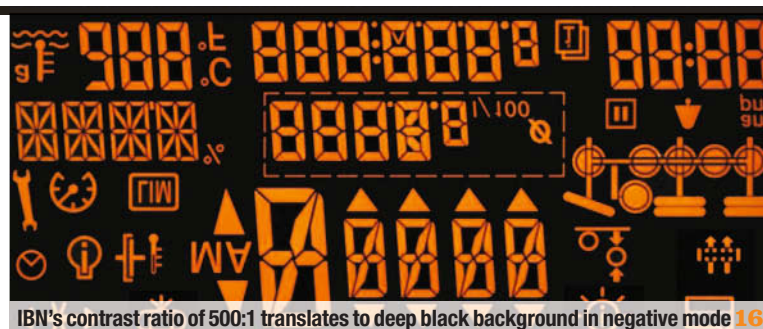
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