Q1 2010 | ABSTRACT

India Research Topical Report

iSuppli®

Opportunities Loom Ahead for India's IC Design Industry

By Jagdish Rebello, PhD., Senior Director & Principal Analyst

Forecast

Frequency, Time Period

- 3-year historical + 5-year annual forecasts

Measures

- Revenue

Regions, Markets

- India

Detail Level

- Independent Design houses, captive design centers

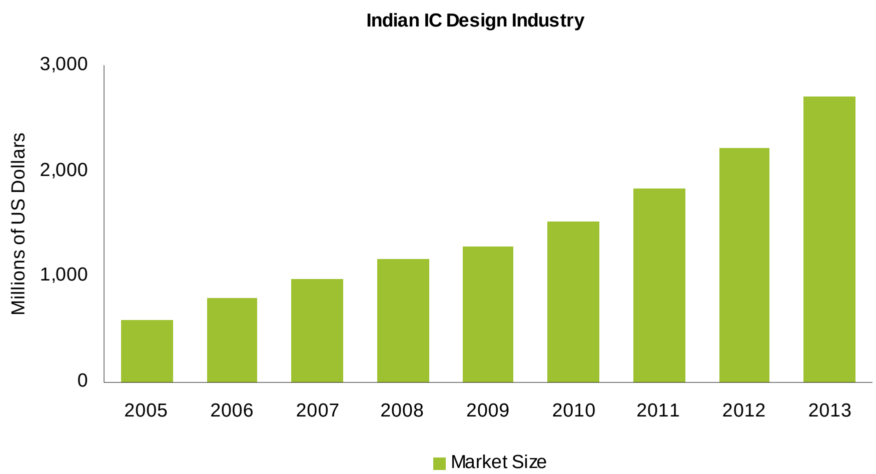
Applications/Products Covered

- Semiconductor Design
- Design and IP vendors

The role of Indian design firms in global design activities is gaining strategic importance, consequently helping the industry to also move up the value chain. Although the number of projects and employee utilization dropped earlier in 2009, new opportunities brought forth by the global recession coupled with the unique enablers prevailing in the Indian semiconductor ecosystem are expected to help the industry withstand the global recession.

Independent Design Houses (IDHs) in India are now starting to move up the value chain while striving to establish a proven track record of solving complex design problems. With a booming domestic market, the demand for IC designs catering to the Indian market is increasing. However, the India IDH industry continues to face challenges including the shortage of engineers, escalating salaries and rising attrition. And with semiconductor manufacturing in India being almost non-existent, the Indian industry also faces increased competition from other design destinations such as eastern Europe, the Middle East, China, and Israel.

As the India semiconductor design industry seeks to move from cost arbitrage to value arbitrage to win turnkey design projects, the iSuppli study on the India semiconductor industry helps you understand the challenges and the competitive landscape of semiconductor design in India to realize the full potential of off-shoring or outsourcing semiconductor design to India.



Key Issues Addressed:

- What is the current and forecasted market size for the Indian semiconductor design industry? What are the key growth drivers?
- Who are the key Independent Design players in the India IC design industry? What design activities are these companies focused on?
- Who are the key customers for India's IDH industry?
- What are the critical challenges facing companies looking to develop or expand existing semiconductor design operations in India?
- How is the regulatory environment in India impacting the India semiconductor design industry?

Applicable To:

- Semiconductor Manufacturers
  - Chief Technology Officers
  - Product Managers
  - Marketing Managers
  - R&D Managers
- Semiconductor Design
  - Chief Technology Officers
  - R&D Managers
- Electronics Manufacturers
  - Purchasing

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Jagdish is responsible for research and competitive analysis of various optical and opto-electronic components, wireless infrastructure and applications in optical networking communications. He also provides insights into emerging optical and wireless technologies such as Passive Optical Networks and WiMAX, while assessing their market impact.

Jagdish Rebello also directs the iSuppli India research initiative and analyzes the rapidly growing demand for consumer, automotive and wireless electronics in India as well as the emerging supply of electronic design and integration capabilities in India.

Prior to iSuppli, Jagdish worked with ADC Tele-communications as a Product Manager for several photonic components, directing the strategic and tactical marketing of MEMS switches, FBGs, optical couplers and WDMs - all specific to the telecommunications market.

Jagdish also successfully managed the optical spectroscopic detector line for Jobin Yvon, Inc. Jagdish has a PhD and MS in mechanical engineering from Ohio State University, an MBA in finance and marketing from Rutgers University, and a BS in mechanical engineering from the University of Bombay.

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