

Global OEM Manufacturing and Design Analysis (GOMDA)™

Who's Designing What? Who's Building What?

By Jeffrey Wu, Analyst

Forecast**Frequency, Time Period**

- Annual update; 5-year period

Measures

- Units
- Percentages

Sectors Covered

- OEM
- EMS
- ODM

Detail Level

- Units produced by a node of the supply chain (OEM, EMS, or ODM) in a given year with the most recent year's detailed volume breakdown by company

Relationship Map

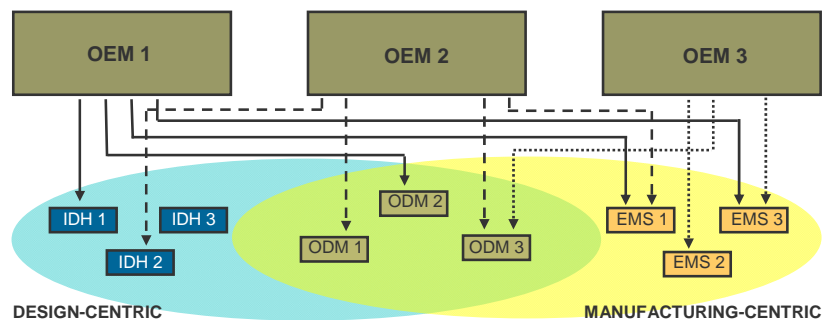
- Each OEM's contract manufacturers and their respective share splits
- Each contract manufacturer's shipment breakdown by OEM client

2009 Application Markets Covered

- Mobile Handsets (Nokia, Motorola, Samsung, LG, Sony Ericsson, etc)
- Mobile PCs and Servers (HP, Dell, Acer, Toshiba, Lenovo, Fujitsu Siemens, etc)
- Flat Panel TVs (LG, Panasonic, Philips, Samsung, Sony, Sharp, Toshiba, Vizio, etc)
- GPS PNDs (TomTom, Garmin, Mio, Magellan, Medion, Becker, Navigon, Thinkware, etc)
- Set-top Boxes (Motorola, Thomson, Pace, Micro, Cisco/Scientific Atlanta, Humax, etc)
- Enterprise Routers and DSLAMs (Cisco, Juniper, Nortel, Alcatel, Huawei, ZTE, etc)

Outsourcing strategies employed by Original Equipment Manufacturers (OEMs) dictate the growth prospects of all other nodes participating in the electronics supply chain. With OEMs depending increasingly on external partners for product design and manufacturing services, managers are challenged with critical tasks such as understanding the complex OEM-EMS-ODM-IDH relationships to identify business opportunities and conduct competitive analyses.

To help you navigate the electronics value chain, iSuppli developed the Global OEM Manufacturing and Design Analysis (GOMDA)™. The GOMDA is a unique service which examines the design and manufacturing outsourcing strategies of leading OEMs and tracks the relationship maps of these OEMs across their extended supply chains (EMS, ODM, independent design houses, component suppliers) to address the critical questions referenced below.

**Critical Questions Answered**

- Who designs for an OEM? What roles do these design houses play in an OEM's product development process? Their locations and capabilities?
- Who builds for an OEM? Where do these contract manufacturers build? What are the share splits of these contract manufacturers for an OEM?
- What are the key outsourcing strategies of leading OEMs? Why are an OEM's design / manufacturing activities insourced or outsourced?
- How do these outsourcing strategies dictate the design and manufacturing relationships across the supply chain? What are the outsourcing trends?
- How might the evolution of contract manufacturers impact OEMs and component suppliers?
- What should I know about my peers' competitive positions in order to better penetrate and service OEMs and contract manufacturers?

Who Should Read This?

- Component Suppliers
- OEMs
- EMS providers
- ODMs
- Financial Analysts
- Consultants
- Independent Design Houses

Lead Analyst**Jeffrey Wu, Senior Analyst**

Prior to joining iSuppli, Jeffrey worked for leading technology companies such as BenQ, Acer Communications and Multimedia, and Dell, where his main responsibilities included channel management, product management, and OEM project management.

While working on the OEM engagement, he was in charge of cost estimation, cost reduction, logistics and service terms negotiation, and Supplier-Managed Inventory implementation.

At iSuppli Corp., Jeffrey is responsible for the analysis and projection of the trends and dynamics of the electronics contract manufacturing industry.

Jeffrey earned a Bachelor of Science degree in Computer Science from Taiwan University and a Master of Business Administration degree from the University of Michigan.

Sample Table of Contents

- Findings and Implications
- Introduction
- Industry Overview
- Major Players
- Trends Analysis
 - Technology
 - Markets
 - Outsourced Design
 - Outsourced Manufacturing
- Analysis of OEMs
 - Design Profile
 - In-house Design Centers
 - Design Partners
 - Manufacturing Profile
 - In-house Facilities / Footprint
 - Manufacturing Partners (EMS, ODM)
 - Share Splits
 - Design and Manufacturing Outlook
- OEM Benchmarking
 - Design Strategies
 - Manufacturing Forecast
 - Outsourcing Strategies
- Analysis of Contract Manufacturers
 - Investments, Mergers & Acquisitions
 - Design Profiles
 - Design centers
 - Manufacturing Facilities / Capacity
 - Customers & Shipment Breakdown
- Contract Manufacturer Benchmarking
 - Manufacturing Rankings
 - Manufacturing Footprint
- Component Suppliers
 - Highlight of key component suppliers

- Figures & Charts**
- Industry Growth
- OEM Rankings
- Design Forecast (where applicable)
- Manufacturing Forecast
- Manufacturing Profiles (in-house vs. EMS / ODM)
- Design Profiles
- OEM Manufacturing Footprint by Region
- OEM-EMS-ODM Relationships Maps
- OEM Strategy Diagram
- Contract Manufacturer Footprint and Capacity
- Contract Manufacturer Mergers & Acquisitions
- Contract Manufacturer capacity estimates
- Top Manufacturers Rankings