



## Electronic System Level (ESL) Market Trends 2009 ESL Becomes Mainstream

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### EXECUTIVE SUMMARY

It would be nice if we could present these numbers as being completely correct, but we can't. We are still suffering from the Cadence bookings machinations of the past. This time the numbers reflect a more negative view of Cadence that actually exists. The problem is by how much. We believe that there is only a 15% to 20% downside left in Cadence's revenue figures. That probably will be taken care of this year but may run into 2010. What is compounding the problem is that the Upper Mainstream Users, Cadence's main customer base, is continuing to drop out of the Implementation market. That mainly shows up in the IC CAD and IC CAD Synthesis numbers. We just don't know by how much.

Still these are by far the best look at the market we've had since 2004; before the bookings game started. What we are seeing is the flattening of the IC CAD market while the ESL market grows as it becomes the design methodology of choice. IC CAD continues to grow even as we are losing seats, because of the merciless march of Moore's Law. There may be fewer IC CAD engineers but the ones that we have are being swamped by problems that only RET (Resolution Enhancement Tools) and DFY (Design for Yield) tools can resolve. That will bring more dollars into the EDA vendor's bottom line. So welcome to the future; 2008 was the first year of the new era of EDA.

### INTRODUCTION

This is the make or break year for ESL. Now that the Upper-Mainstream users are beginning their migration to ESL we should know the winners and the losers fairly soon. If you don't have a position by the end of 2009 you will need to acquire a company to become a player. In fact many of the medium-sized vendors are using acquisitions to strengthen their position, especially in ESL Synthesis.

Overall the leaders today are Cadence, The MathWorks, Mentor and CoWare. Cadence is a surprise to many but their position in ESL Co-Verification has kept them high in the rankings for awhile now. ESL Co-Verification uses Emulation to speed up the hardware so that HW/SW verification is possible. Cadence may have its problems but its Verification group is still a strong competitor in the market.

### OVERVIEW

The ESL Market Trends report includes market share, market forecast and analysis by sub-applications for the ESL sub-applications.

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## ESL Becomes Mainstream



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