

Whither? or Wither?

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My Prediction

- Intel will not exist in *nnn* years
 - or won't be the company it is today
 - or some other major player won't exist
 - doesn't matter - "stuff happens"

The future?

- Clock speeds won't increase
- DSM leads to expensive variability problems
 - if problems can be solved, how can we exploit DSM
- Future of Computing is parallelism
 - and always will be!

The fatal lure

- Fab companies will believe the hype
 - analogy with 3G phone auction
 - companies invested in a ruinous auction
- But:
 - consumers expect faster, better, cheaper each year
 - It is not going to happen.
- Consumers stop upgrading
 - expensive capital intensive plant lies idle

Salvation?

- The channel tunnel syndrome
 - too expensive to let go bankrupt
- Even so traditional fab company is finished
- Real Question
 - what happens when traditional consumer expectations can't be met?
 - new un-foreseen products
 - who will exploit that niche?

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- The End