Steve Jobs' Full Legacy Yet to be Written - What's Next?

Steve Jobs' has left a legacy that is hard to capture. His vision and product from Pixar to Apple are still growing. It is also widely believed that there are more cool products in the pipeline that have Steve's touch to them – such as a rumored Apple iOS central HDTV. This blog however addresses what I believe will be a tectonic shift in the high technology ecosystem which is likely to happen over the next 12 months. It is my conjecture that Apple is building a highly customized multi-core ARM processor suitable for a future MacBook Air – and one that displaces Intel in the entry level platforms in the process. Much as Apple moved from PowerPC to X86, now Apple is getting ready to move over to its own in-house "uber-ARM" silicon for the next MacBook.

Just to set the record straight, I have no inside information of any kind. What I do see however are indications that Apple and TSMC are doing a lot of chatting. Many tech types, which are not semiconductor folks, have speculated that Apple is dropping Samsung because of the legal issues (re: lawsuits) between the companies. Given the volume of Apple's wafer consumption that simply isn't possible. A logical explanation however is that the Apple A series, including the rumored new A6 quad core which are the focus of the iPhone and the iPad, are going to continue to be designed by Apple's Intrinsity team and built by.

The TSMC industry scuttle-butt is better explained by conjecturing that the former PA Semiconductor team (now an Apple team) is planning to build a new uber-ARM chip at TSMC. Moreover, if you look at the very long history of the PA Semi team part of their *modus operandi* is to use TSMC models, build specialty transistors, libraries and data paths, and build the highest performance yet lowest power consumption/MHz processor possible. They did this for the original StrongARM, they did this at SyByte using a MIPS processor and finally using the Power architecture at PA Semi. It only seems reasonable to guess they are using the same playbook at Apple – but most likely using ARM. There is also a chance, given that Apple's OS ran for years on the Power architecture, that PA Semi is simply morphing their

original networking oriented Power chip into an uber-Power chip.

In any case, don’t be surprised when Apple announces a future MacBook Air that uses an internally designed “uber-chip” done by the PA Semi team that displaces Intel from the entry level Apple laptops. That will indeed be a tectonic shift in the technology landscape – and Steve’s legacy will only grow that much larger because of it. Never under estimate Steve’s vision – even if it means taking away some of Intel’s business.

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