

Will 'Santa Rosa' Make a Big Splash in the Mobile Market?

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Think of it as Centrino, part 4. While Advanced Micro Devices' attempted to steal the spotlight last week, all the company did was call attention to Intel's 'Santa Rosa' launch tomorrow, which represents the latest major update to Intel's Centrino mobile platform. Intel is now set to officially launch the platform Wednesday morning.

So will the new platform make the big splash the company is hoping for, or will its addition simply mean another minor plop in the mobile market waters? No one knows for sure yet, but at this point analysts seem to be split over Santa Rosa's impact, with some saying the platform will bring significant innovations, while others are a bit less enthusiastic.

The "Santa Rosa" flavor of the Centrino technology includes a combination of components: an Intel Core 2 Duo processor, the Mobile

Intel 965 Express chipset family, Intel's next-generation wireless-N network connection, and its (for now) optional Turbo Memory technology. Intel launched the "Centrino" brand with its "Carmel" platform in 2003, then followed it up "with the Pentium M-based "Sonoma" in 2005 and the dual-core Core Duo "Napa" platform in 2006.

Lately, both Intel and AMD have been talking a lot about the importance of mobile processors and platforms. Last month, Intel executives outlined their plans for Santa Rosa, Montevina, and other future mobile platforms during its Developer Forum in Beijing.

In fact, during IDF, the company seemed to place so much faith in mobile computing's future that it bumped up its mobile processor roadmap and continued to emphasize near-future innovations, such as the integrated Wi-Fi/WiMAX solution supposedly coming in 2008 with Montevina-based notebooks.

Of course those announcements followed what is now common knowledge in the industry: that the mobile market is exploding. Most market research firms now predict that notebook shipments will outpace their desktop counterparts by 2011, with some saying the shift may come even sooner.

Dean McCarron of Mercury Research believes tomorrow's Santa Rosa debut will be a fairly significant platform introduction, and attributes this significance primarily to one thing: that the platform signifies yet another important step towards eliminating the performance gap between mobile and desktop microprocessors.

"One of the big things about the Santa Rosa launch is that Intel is migrating its vPro professional features onto a mobile platform for the first time," McCarron said. "People - both mainstream consumers and business users - are continuing to migrate from desktop to notebook," he

added. "In the past, the manageability issues have been significant - between desktop and laptop - , but with Santa Rosa, those differences are now becoming less and less visible."

Santa Rosa includes the optional "Turbo Memory" technology, otherwise known as "Robson". The technology calls for a small flash drive to cache frequently-used content, including startup files. It's another reason McCarron believes Santa Rosa will have a fairly big impact on the marketplace.

"This platform is also going to have the option of having onboard flash for disk access acceleration," he said. "That is certainly another attribute that is unique to Intel for the moment."

For its own part, Intel says that the optional Turbo Memory will do things like decrease resume time from notebook hibernations, as well as further reducing system power drain - another important feature with Santa Rosa, according to Jon Peddie of Peddie Research.

"The significance - of Santa Rosa - is that Intel has been working on power reduction technology for some time now," Peddie said. "The first offering was Centrino, which was wildly successful," he added. "Now we're seeing even greater power reduction, which is significant especially because we're also seeing a substantial bump in performance."

In the past, Peddie said that Intel has not had a particularly good reputation for power management, but that with Santa Rosa, it has not only caught up, but surpassed AMD.

Peddie, like McCarron, also believes Santa Rosa will stand out because its added processing power. People will now be able to do virtualization and threaded computing just like they would on a desktop system, Peddie said. Combine that power with improved operating system

performance with Vista, and users will be multi-tasking on their laptops with fewer and fewer system hiccups - something that still hasn't been possible with today's laptop offerings.

Peddie also believes that Santa Rosa will be appealing because Intel has opened it up to OEMs, and is not making them stick with the company's integrated graphics, which even Intel has admitted to be a weak link in the past.

But others aren't as excited about Santa Rosa.

"It's not as radical as when Centrino was first announced with the performance and connectivity improvements," said Richard Shim, senior research analyst with IDC's Personal Computing Program.

Like McCarron and Peddie, Shim admits that Santa Rosa does address what are, for the time being, key issues in the notebook market: connectivity and battery life savings. But that's about it, as far as he can tell.

"It really doesn't offer anything new from a feature standpoint," Shim said, "and breaks little ground. And while he does admit that users will likely find the platform appealing, he believes that its differences will be subtle at best, and most likely noted by power users.

"The power savings offset some of the battery-life reduction that Vista added and the groundwork has been laid for such things as turbo memory and the "Robson" flash-based hard drive – but the latter doesn't look like it's playing out as it was once billed, but we'll see what impact it has," Shim continued.

So should AMD be worried? Shim believes the company needs to at least start delivering on its mobile roadmap.

"They need to start moving faster, and have a faster response," he said. "From a marketing perspective, they don't have the punch. People took little notice of AMD's own mobile announcements last week."

McCarron and Peddie, on the other hand, see no need for panic...yet.

"Once they came out with the dual core Turion product, that narrowed the gap pretty significantly," McCarron said. "It's still kind of a difference in approach, but AMD - in the second half of last year - made enough moves to narrow the gap between the two companies in the mobile space."

In terms of market presence, McCarron points out that AMD's mobile market share was actually much lower than their desktop share. "With Turion, they changed it enough so that it was competitive," he said.

As far as AMD is concerned, Peddie admits that Intel does seem to have a leg up for now in the mobile market, but that could change very quickly.

"AMD currently doesn't have the same power management features that Santa Rosa has," he said. "Also, Intel has a more scalable chip at this point. Of course, AMD's counterpoint on that is that, yes, Intel is beating us on the high-end segment, but the mainstream is where the big numbers are."

Peddie admits however that Intel could very well take the Core 2 duo and downscale it, claiming that its now a midrange part, which would make AMD's claim tenuous at best.

"The flip side is that the OEM and ODMs want AMD in the game," said Peddie. "They don't want to be under the thumb of Intel and if they can find any good reason to pick AMD, they'll do it. So for now, the steering

wheel is with in the OEMs, which is where it should be. I think we have a more equal level playing field now, and that each company will have its advantages."

"That's nothing but good news for us and for the OEMs," Peddie added.

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