
THE MERCHANT EMBEDDED COMPUTING MARKET

2012 EDITION

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Table of Contents

Chapter 1 INTRODUCTION.....	1
1.1 Objectives.....	1
1.2 Scope and Definitions	2
1.2.1 Merchant Embedded Computing (MEC) Definition.....	2
1.2.2 Systems Not Included in MEC Definition and coverage:.....	3
1.2.3 Five Application Areas.....	4
1.2.4 Nine Bus Architectures.....	4
1.2.5 Four Functional Categories	5
1.2.6 Report Organization.....	6
1.2.7 Methodology.....	7
Chapter 2 EXECUTIVE SUMMARY	8
2.1 Introduction	8
2.2 MEC Industry Analysis.....	8
2.3 Application Analysis	10
2.4 Revenue by Bus Architecture.....	14
2.5 Revenue by Function.....	17
Chapter 3 TECHNICAL TRENDS.....	20
3.1 Overview	20
3.1.1 Backplanes and Board Connectors	20
3.1.2 Enter the “Open Bus” Architectures	21
3.1.3 Low Cost SerDes Changes the Bus Game.....	23
3.1.4 Major Changes and Initiatives.....	24
3.1.5 Microprocessor Trends	26

3.1.6	DSP Trends	27
3.1.7	GPU Trends	28
3.1.8	APU Trends.....	28
3.1.9	FPGA Trends.....	29
3.1.10	Interconnects - High Density Silicon, 3DICs, Integrated Optical Links	29
3.1.11	Silicon photonics	30
3.1.12	3DICs	30
3.1.13	Combining Optical and Silicon	31
3.1.14	Operating Systems	32
3.1.15	Conclusion	32
3.2	VMEbus International Trade Association.....	33
	VITA Standards - What's New	34
3.2.1	2eSST (VITA 1.5) – 2 edged Source-Synchronous Transfers	35
3.2.2	Serial I/O on VME64x (VITA 31) – Serial with Ethernet Added	37
3.2.3	PMC (IEEE 1386.1) - PCI Mezzanine Card.....	38
3.2.4	PrPMC (VITA 32) - processor PMC	39
3.2.5	PCI-X for PMC (VITA 39) – Adds PCI-X.....	41
3.2.6	VXS (VITA 41) – Adds Switched Serial	42
3.2.7	XMC (VITA 42) - Next-Generation VME Mezzanine card	44
3.2.8	VPX (VITA 46) – Higher Speed I/O, Switched Fabrics in Harsh Environments	45
3.2.9	REDI (VITA 48) - Ruggedized Enhanced Design Implementation	48
3.2.10	FMC (VITA 57.1) - FPGA I/O Mezzanine Card.....	50
3.2.11	LRIE (VITA 58.0) - Line Replaceable Integrated Chassis	50
3.2.12	Yet To Be Ratified And Working Groups	51
3.3	PCI Industrial Computer Manufacturers Group (PCIMG).....	52
3.3.1	PCI-SIG.....	52
3.3.1.1	PCI Slot (PICMG 1.x)	54
3.3.1.2	ePCI-X (PICMG 1.2) - adds PCI-X.....	55
3.3.1.3	PCI Express (PICMG 1.3) - SHB Express	55
3.3.2	CompactPCI (PICMG 2.x) – PCI with Rugged Connectors	56

3.3.2.1	cPSB (PICMG 2.16) –Adds Packet Switching to CompactPCI	59
3.3.2.2	CompactPCI Express (PICMG EXP.0)	59
3.3.2.3	CompactTCA (PICMG 2.0)	61
3.3.3	AdvancedTCA (PICMG 3.x) – Adds ATCA to PCIMG	61
3.3.3.1	Base Specification (PICMG 3.0)	63
3.3.3.2	Ethernet (PICMG 3.1)	67
3.3.3.3	InfiniBand (PICMG 3.2).....	67
3.3.3.4	StarFabric (PICMG 3.3).....	68
3.3.3.5	PCI Express (PICMG 3.4).....	68
3.3.3.6	RapidIO (PICMG 3.5)	68
3.3.4	Advanced Mezzanine Card (AMC)	68
3.3.4.1	Base Specification (PICMG AMC.0)	70
3.3.4.2	PCI Express for AdvancedMC (PICMG AMC.1)	73
3.3.4.3	Ethernet for AdvancedMC (PICMG AMC.2)	73
3.3.4.4	Storage Interfaces for AdvancedMC (PICMG AMC.3).....	73
3.3.4.5	RapidIO for AdvancedMC (PICMG AMC.4)	73
3.3.5	MicroTCA (MTCA.0)	74
3.4	PC/104 Embedded Consortium.....	76
3.4.1	PC/104.....	76
3.4.2	PC/104-Plus	78
3.4.3	PCI-104	80
3.4.4	PCI/104-Express and PCIe/104.....	80
3.4.5	EBX and EBX Express	83
3.4.6	EPIC and EPIC Express	86
3.5	Intel and VIA Motherboards	87
3.5.1	ATX	87
3.5.2	MicroATX.....	88
3.5.3	FlexATX.....	89
3.5.4	BTX	89
3.5.5	Mini-ITX.....	90

3.5.6	Nano-ITX.....	90
3.5.7	Pico-ITX	90
3.6	Computer on Module (COM)	91
3.6.1	ETX - Embedded Technology eXtended	92
3.6.2	COM Express (PICMG COM.0).....	93
3.6.3	XTX	95
3.6.4	Rugged System-on-Module Express (VITA 59).....	96
3.6.5	Qseven	96
3.6.6	Other COM Implementations: CoreExpress, ESM, etc.....	98
3.7	SFF-SIG: Small Form Factor - Special Interest Group	98
3.7.1	SUMIT Interface	99
3.7.2	COMIT	100
Chapter 4 INDUSTRY STRUCTURE		101
4.1	Introduction	101
4.2	Global Economic Factors.....	101
4.3	Mergers and Acquisitions	103
4.4	Assembly - Total Available Market	105
4.4.1	Electronics Assembly Overview	105
4.4.2	MEC Industry Electronics Assembly Overview by Applications	105
4.4.2.1	Communications Assembly	107
4.4.2.2	Industrial Assembly.....	110
4.4.2.3	Medical Assembly	113
4.4.2.4	Military/Aerospace Assembly.....	116
4.4.2.5	Other Assembly.....	119
4.5	Competitive Strategies.....	119
4.5.1	Time to Market	120
4.5.2	Life Cycle Management.....	120
4.5.3	Intellectual Property	121
4.5.4	How to Pick a Strategy	121

4.5	Corporate Relations	122
4.5.1	Outsourcing.....	122
4.5.2	Alliances and Partnerships – Creating a Leverage Effect.....	123
4.5.3	Mergers and Acquisitions – A Unique Opportunity	125
4.5.4	Industry Consolidation.....	127
4.6	Standards Proliferation – Embrace the Change.....	128
Chapter 5 INDUSTRY ANALYSIS & HISTORY 2002-2011		130
5.1	Introduction	130
5.1.1	MEC Size and History	130
Chapter 6 - APPLICATION FORECAST		135
6.1	MEC Overall Industry Forecast.....	135
6.1.1	State of the Industry – The Next Two Years.....	135
6.1.2	Security and Counterfeits Issues Rise Up.....	137
6.1.3	Cloud Services	138
6.1.4	Intel, ARM, and Win8.....	138
6.1.5	ARM and AMD.....	139
6.2	Revenue by Application Summary	140
6.3	MEC Communications.....	144
6.3.1	MEC Communication Forecast.....	145
6.3.2	MEC Communications Industry Trends & Analysis:	146
6.3.2.1	Telecom.....	147
6.3.2.2	Datacom.....	149
6.3.3	MEC Communication by Bus Architecture	150
6.3.4	MEC Communication by Function.....	153
6.4	MEC Industrial Automation.....	155
6.4.1	MEC Industrial Automation Forecast.....	155
6.4.2	MEC Industrial Automation Industry Trends & Analysis.....	158
6.4.3	MEC Industrial Automation by Bus Architecture	159

6.4.4	MEC Industrial Automation by Function.....	162
6.5	MEC Medical	164
6.5.1	MEC Medical Forecast.....	165
6.5.2	MEC Medical Industry Trends & Analysis:	167
6.5.3	MEC Medical by Bus Architecture.....	167
6.5.4	MEC Medical by Function	170
6.6	MEC Military/Aerospace	172
6.6.1	MEC Military/Aerospace Forecast	173
6.6.2	MEC Military/Aerospace Industry Trends & Analysis:	176
6.6.3	MEC Military/Aerospace by Bus Architecture	176
6.6.4	MEC Military/Aerospace by Function	179
6.7	MEC All 'Other' Applications.....	181
6.7.1	MEC All Other Applications Forecast	181
6.7.2	MEC All Other Applications Industry Trends & Analysis:.....	182
6.7.3	MEC All Other Applications by Bus Architecture	182
6.7.4	MEC All Other Applications by Function	185
Chapter 7 BUS ARCHITECTURE FORECASTS.....		187
7.1	Bus Architecture Trends & Analysis:.....	187
7.2	PCI	191
7.3	CompactPCI.....	194
7.4	VMEbus	198
7.5	AdvancedTCA.....	204
7.6	PMC.....	211
7.7	PC/104, EPIC, EBX, ATX, ITX	216
7.8	COM	223
7.9	AMC AdvancedMC and MicroTCA (μ TCA).....	228
7.10	Other Bus Architectures.....	235
Chapter 8 BOARD FUNCTION FORECASTS.....		239

8.1	Summary Revenue Forecast by Function.....	239
8.2	SBC Boards/Modules.....	242
8.3	DSP Boards/Modules	247
8.4	I/O Boards/Modules	252
8.5	Other Functions	257
8.5.1	Other Functions by Categories:	262
 Chapter 9 COMPANY PROFILES		265
	AAEON Technology, Inc. (an ASUS assoc. Co).....	266
	AcQ Inducom.....	268
	Acromag, Inc.	269
	Acrosser Technology Co., Ltd.....	270
	ADLINK Technology, Inc.	271
	Ampro	273
	AdvancedIO Systems, Inc.	274
	Advantech Co., Ltd.	276
	Aitech Defense Systems, Inc.	278
	ARBOR Technology Corporation	280
	AudioCodes, Ltd.	281
	Avalue Technology, Inc.	282
	AXIOMTEK Co., Ltd.....	283
	BittWare, Inc.	284
	Concurrent Technologies	285
	congatec AG	286
	Connect Tech, Inc.....	287
	Continuous Computing	288
	Cornet Technology Communications.....	289
	Critical I/O, Inc.	291
	Curtiss-Wright Controls Embedded Computing	292
	Cyclone Microsystems	295

Data Device Corporation.....	296
Dialogic Corporation	297
Diamond Systems Corporation	299
Diversified Technology, Inc.	301
DSM Computer AG.....	302
Dynatem, Inc.	303
Electronic Equipment Produktion & Distribution GmbH	304
Elma Electronics	305
ELTEC Elektronik AG.....	306
Embedded Planet.....	307
Emerson Network Power Embedded Computing.....	308
Eurotech Group.....	310
EVOC Intelligent Technology Co., Ltd.	311
X-ES eXtreme Engineering Solutions, Inc.	312
Fastwel	313
GE Intelligent Platforms	314
General Micro Systems, Inc.	316
iBASE Technology.....	317
I-Bus Corporation	318
IEI Technology Corp.	319
Interface Concept.....	320
Interphase Corporation.....	321
ITOX Applied Computing.....	322
Kontron AG.....	323
Lanner Electronics, Inc.	325
LiPPERT Embedded Computers GmbH	326
Lyrtech, Inc.....	327
Magma	328
MEN Micro Elektronik GmbH.....	329
Mercury Computer Systems, Inc.....	331

Micro/sys, Inc.....	333
MPL AG.....	334
N.A.T. GmbH	335
Nallatech	336
National Instruments Corporation.....	337
NEXCOM International Co., Ltd.....	339
Octagon Systems.....	340
One Stop Systems, Inc.....	341
Pentek, Inc.	342
Performance Technologies	343
PFU Systems, Inc.	345
Portwell, Inc.	346
RadiSys Corporation.....	347
RTD Embedded Technologies, Inc.....	349
SECO	350
SKY Computers, Inc.	351
Sun Microsystems, Inc./Oracle	352
Technobox, Inc.....	353
Tekmicro, Inc.....	354
Telco Systems.....	355
TEWS TECHNOLOGIES GmbH.....	356
Themis Computer.....	357
Trenton Technology, Inc.	358
V Rose Microsystems, Inc.	359
Vadatech, Incorporated	360
VersaLogic Corporation.....	361
VIA Technologies, Inc.	362
WinSystems, Inc.	363
Xembedded, Inc.	364

2012 MERCHANT EMBEDDED COMPUTING MARKET

Embedded Board and Bus Systems

Communications



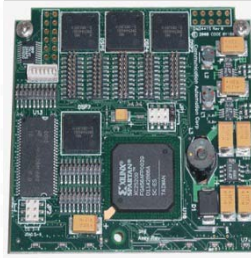
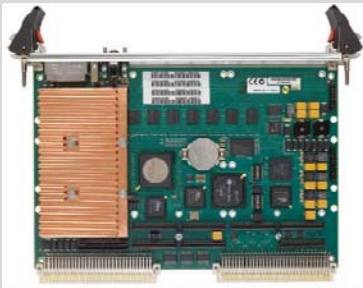
Industrial Automation



Military/Aerospace



Medical



Buses: VME, PCI, PCIe, cPCI, PC/104, COM, SFF, ATCA, AMC, PMC

Chapter 1

INTRODUCTION

1.1 Objectives

This report examines in detail the size, trends, technology, and market opportunity in the **Merchant Embedded Computing (MEC)** market. It relates technological advances and development of various product specifications, core technology road maps, and trends and issues of importance to the industry; it examines the market forces that are changing the nature of the business, including trends toward outsourcing; and it considers M&A impacts on industry consolidation and the issues that are altering the basic business and future success of the merchant vendors. Secondly, it analyzes business issues and forecasts the market size and growth for various segments and technologies. Finally, the report profiles selected vendors, summarizing their products, services, and primary value propositions.

Information and analysis is current as of June 2012.

The MEC report is designed to aid executives in senior management, sales, business development, marketing among current and potential manufacturers and for users of embedded computing products in making important strategic and product decisions.

The MEC business consists of several dozen large companies with diversified product portfolios and nearly a hundred of small companies targeting product niches, often with special, long-established relationships with buyers. MEC products number in the thousands and unit shipments in the hundreds of thousands to millions as of this writing—hence, this report sizes the major applications and segments by revenue as well as analyzes trends and key issues facing MEC executives. It is not an exact science, as detailed data is often not available in all cases—at best, it is an estimate based on all available information and incomplete data.

In the last two years the MEC business and applications have undergone significant changes, particularly with respect to the end applications markets. Going forward, with the advent of 28-nm CMOS technology and 4-8 billion transistor ASICs, it is clear that in a few years

a single-board computer (SBC) will have functionality and processing power equivalent to that found in the rows of computers in the raised-floor data centers of the past decade. This functionality will be field programmable at the gate level. Multi-core microprocessors are being integrated with graphic processing units, digital signal processors, and soon FPGAs – all in a single, very powerful AISCs.

1.2 Scope and Definitions

First, the market is extremely complex, therefore its definitions are not precise. There are many overlaps in products and markets. Attempts to put everything into nice neat buckets and assign a number do not always work which makes market issues difficult to characterize. The term “embedded computing” has become a favorite buzzword. It is freely used about the industry to refer to anything that is a computer in a box; therefore, as see below we try to specify exactly how the term is used within the context of this report.

1.2.1 Merchant Embedded Computing (MEC) Definition

MEC is defined as a computer system consisting of a single-board computer or a series of boards and a backplane. The bus architectures are defined by a set of industry standards for the signaling, bus, connectors, and physical form factors. The key differentiator from simply any embedded computer is the MEC system supports an industry standard bus. It usually is in a pluggable format with multiple boards. MEC boards are designed for multiple applications and not a single, dedicated application.

- MEC systems are usually products available from multiple vendors offering a variety of standard, “off-the-shelf” boards available from merchant vendors within the open market.
- The system may run a proprietary operating system or a generic off-the-shelf operating system, with the application software usually product specific.
- The operating and application systems are not exposed to the end user, nor can the user change or run general-purpose applications software.

- Generally, the user does not see the actual function of the computer inside but may only access its operation with a button control panel, menu system, or screen with a dedicated application.
- Typical MEC applications might include use in a medical scanner, industrial robot, manufacturing process control system, various communications equipment, complex military equipment, etc. Some embedded computing systems are operated in a manner that the computer function is not apparent to the final application, while other embedded systems are clearly operated by computers which are integrated into a machine's functionality. An example is the highly complex imaging system of a CAT, PET, or MRI diagnostic system or an industrial automation robot.

1.2.2 Systems Not Included in MEC Definition and coverage:

- "A microprocessor on a board of electronics" not conforming to an industry bus standard as its scope is too broad and could encompass virtually everything with a microprocessor.
- Single application-specific microcontroller-operated applications, such as a musical greeting card, appliance, stereo system, thermostat, etc., or any device that embeds a microprocessor of some kind
- Complex, single-chip embedded solutions and systems on chip (SoCs)
- Consumer PC motherboards and add-in boards
- Data center server boards

While PC motherboards are bus based and popular in many industrial applications, they are designed primarily for general desktop applications, not for dedicated applications. However, capturing data about PC-grade motherboards used in the embedded market is quite difficult because a large percentage of such boards are sold through commercial channels. Motherboards sold by merchant vendors in this report are covered in the "PC/104, EPIC, EBX, ATX, and ITX" category, as they typically have been enhanced beyond normal PC-grade quality used to run Windows, Google, and Facebook.

Scope

The MEC report analysis covers:

- Five vertical market application areas
- Nine bus architectures categories

- Four functional categories

1.2.3 Five Application Areas

While there are hundreds of sub-applications, MEC vendors generally compete in five broad vertical market application categories:

- 1) **Communications** (cellular infrastructure, CPE, etc.)
- 2) **Industrial** (process control, test and measurement, and other)
- 3) **Medical** (diagnostics/imaging, therapeutic, and surgical/monitoring)
- 4) **Military/Aerospace** (flight navigation, weapons, C3, and other)
- 5) **Other** (automotive, off-road, ships, trains, kiosks, etc.)

These applications typically have common product characteristics and operating environments. Mil/Aero equipment requires battlefield-rugged architecture, whereas medical equipment typically operates in a “72 degrees and fluorescent lighting” environment of a hospital. Industrial automation boards may be in process control, mining, chemical, or agricultural equipment, or a production line robot; communication boards might be focused on high-speed, optical transfer data rates. Outside plant equipment may operate in harsh environments and require the ability to withstand -40°C to $+80^{\circ}\text{C}$ temperatures and greater amounts of shock, vibration, humidity, and electrostatic discharge.

1.2.4 Nine Bus Architectures

The industry-standard, committee, trade association bus architectures are addressed in this report. These include:

- 1) PCI
- 2) CompactPCI (cPCI)
- 3) AdvancedTCA (ATCA)
- 4) VMEbus
- 5) PMC
- 6) AdvancedMC (AMC) and MicroTCA (μTCA)
- 7) PC/104, EPIC, EBX, ATX, and ITX
- 8) Computer on Module (COM)

9) Other

Each bus architecture has either evolved from a specific technology or from a company spinoff that became an industry standard. Each specific architecture generally fills specific product requirements, although considerable overlap among many of the different buses occurred over time. In some cases the bus structures compete head-on with each other. In other applications they are completely independent and do not compete. Some buses are designed for harsh operating environments such as outside plant, military-grade, etc., and others are designed for less stringent indoor applications. Some applications focus on high-speed interconnection while others require only low-speed interconnects. This can have a dramatic impact on how the boards are designed and which bus structures are selected. Lastly, some applications are price sensitive and require bus structures that are made in very high volumes in order to have low prices.

1.2.5 Four Functional Categories

The MEC industry revenues can be broken into four functional categories:

- 1) **SBC (Single-Board Computer) Boards/Modules:** A board or module whose primary function is data or control processing and that incorporates a combination of computing engines and I/O devices
- 2) **DSP (Digital Signal Processing) Boards/Modules:** A board or module whose primary function is processing a stream of analog signals and also converting from analog to digital formats. This could be voice processing, image processing, communication signals, etc. The processor may be a “traditional” DSP or a general-purpose processor used as a signal processor, and now even graphic engines are being used. DSP processing usually involves Fourier waveform analysis and signal processing.
- 3) **I/O Boards/Modules:** A board or module whose primary function is its connection to other parts of a system or network (or user interface). Such boards may contain various processors, but the primary function is moving data in and out of the system through various electrical or optical interfaces.
- 4) **Other:** Any board that does not fit the above categories, including the following:
 - Switchboards/Modules: Switch fabric cards

- Other Boards/Modules: Any board that does not fit into another category, such as memory boards
- Chassis/Backplanes: The physical components, including power supplies, connecting the system's boards and modules
- Software: Software—typically OS or middleware—products sold by the merchant vendors
- System Integration: The value placed by the merchant vendors on the integration of various products sold as a unit

1.2.6 Report Organization

This report is organized into eight chapters and an appendix.

Chapter 1, "Introduction" - outlines the scope, organization, and methodology and it defines some common embedded terminology.

Chapter 2, "Executive Summary" - highlights all key facts detailed within the main body of the report.

Chapter 3, "Technical Trends" -presents the bus architectures and specifications.

Chapter 4, "Industry Structure"- presents business issues that are altering the embedded computing market going forward.

Chapter 5, "Industry Analysis and History 2002–2011" - analyzes the historical data and trends starting in 2002 and analyzes the industry's results for 2011

Chapter 6, "Application Analysis and Forecast 2012–2016" -analyzes key issues and trends by application going forward.

Chapter 7, "Bus Architecture, Functions, and Technologies"- analyzes key issues and trends for 2011–2016 by technologies, bus architectures, and form factors.

Chapter 8, "Board Functions" - analyzes the data by type of board (SBC, I/O) and bus.

Chapter 9, "Company Profiles"- provides profiles of the key merchant companies competing in the merchant embedded computing market.

1.2.7 Methodology

The information presented in this report was gathered from a variety of sources. The primary sources were engineering, marketing, business development, and communications managers in merchant embedded computing companies who were contacted via the Internet, directly, or at trade shows and conferences. These individuals were asked to respond to a survey. In some cases, the answers to the survey were delivered as written responses. In other cases, the information was conveyed via telephone or personal interviews.

The secondary sources were company literature (such as websites, annual reports, SEC filings, white papers, and press releases) and trade publications. Other secondary sources were materials distributed by companies during industry conferences and trade shows.