Device Software Market Overview

Martin Klaus
Wind River

September 23, 2005

Market Size

- **Worldwide Shipments**
  - 2004: $905 Million
  - 2007: $1.5 Billion (20% growth rate)

- **Key Market Segments**
  - Consumer Electronics (42%)
  - Telecom/Datacom (20%)
  - Industrial Automation (14%)

- **Leading Vendors**
  - Microsoft (26%)
  - Wind River (23%)

Source: VDC July 2005

Market Drivers

- Increasing demand for pre-integrated platforms as a basis for standardization enterprise wide
- Need for standard development environment regardless of:
    - RTOS, Architecture, Programming Language
- Focus on building out product offerings through internal development and strategic partnerships
- Adoption of Linux forces vendors to focus on addressing the needs of embedded developers
- Trend towards commercial OSes from proprietary
- Complexity of systems driving towards use of high level design languages (UML) and the adoption of commercial middleware

Device Development Process

| Hardware Bring-Up | Application Software | Verification and Test | Deployment | Manufacturing |

Enterprise Development Process

- Challenges
    - Extremely fragmented solution space
    - Increasingly complex hardware and software designs
    - Integration of software modules from different sources
    - Difficult transition across development phases
    - Time, Cost and Quality constraints

Device Software Development Platform

- Objective
  - Develop frameworks and exemplary tools for device software development to enable hardware bring-up, platform and application software development in a consistent manner

- Initial Projects
  - Target Management
  - Device Debugging
  - Mobile Java Tools

- Related Projects
  - CDT, eSWT, TPTP …

Contacts and Resources

- **DSDP Website and Mailinglist**
  - www.eclipse.org/dsdp
  - news://news.eclipse.org/eclipse.dsdp
  - Doug Gaff, doug.gaff@windriver.com

- **Embedded Marketing Workgroup**
  - eclipse.org-embedded-marketing@eclipse.org
  - Martin Klaus, martin.klaus@windriver.com
  - Robert Day, robert_day@mentor.com

Join the Workgroup!