2007 European Product Innovation Award
Award Recipient: InduSoft

Award Description

The Frost & Sullivan for Product Innovation Award is presented each year to the company that has demonstrated excellence in new products and technologies within their industry. The recipient company has shown innovation by launching a broad line of emerging products and technologies.

Research Methodology

To choose a recipient of this Award, the analyst team tracks all new product launches, R&D spending, products in development, and new product features and modifications. This is accomplished through interviews with the market participants and extensive secondary and technology research. All new product launches and new products in development in each company are compared and evaluated based on degree of innovation and customer satisfaction. Companies are then ranked by number of new product launches and new products in development.

Measurement Criteria

In addition to the methodology described, there are specific criteria used to determine final competitor rankings in this industry. The recipient of this Award has excelled based on one or more of the following criteria:

- Significance of new product(s) in their industry
- Competitive advantage of new product(s) in their industry
- Product innovation in terms of unique or revolutionary technology
- Product acceptance in the marketplace
- New product value-added services provided to customers
- Number of competitors with similar product(s)

I. Market Overview and Key Challenges

A user interface is a collection of equipment and processes through which users interact with a particular electronic device, computer programme or other such complex machines. A human machine interface (HMI) is an ensemble of apparatuses that presents data to human operators and also enables the operators to control a process. User/operator interfaces play a vital role in industrial automation, allowing for efficient operation and monitoring of essential production equipment. From their initial applications, which primarily consisted of electromechanical interface systems such as pushbuttons, lights, switches and levers to the increasing use of programmable graphic interfaces with touch-screen technology, modern HMIs have become much more intuitive, reliable and easy to use, by both skilled and unskilled operators.

The European HMI market is growing at present having registered a growth rate of approximately 10 per cent in 2006. The market has been witnessing moderate growth rates, following a period of global economic slowdown in 2001-2002, which resulted in limited investment across all industrial sectors as a whole. However, the European HMI market observed a sustained period of growth thereafter with revenues rising steadily from 536.7 million in 2003 to about 623.7 million in 2006-2007. The market is also expected to witness steady growth and faster developments over the coming years with revenues reaching 725.3 million by 2010. This level of growth is mainly attributable to the continued demand for improved automation systems and thus more efficient HMIs. The focus of manufacturers to invest in HMI solutions that provide added functionality and include state-of-the-art features that are more efficient and easy to integrate into communication networks, is expected to result in further rise in future revenues and growth rates.

The participants in the European HMI market have to overcome a few critical challenges to ensure successful functioning despite the overall growth it is witnessing. For instance, the need for security in operations is rising with the integration of plant floor automation and control into supervisory and enterprise-level systems through remote communications. The adoption of Web-based HMIs, which offer low operating costs, also poses a threat to the company, as it may cause unauthorised access of vital

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information and an intentional functional disruption. Thus, security becomes a key focus area.

With the growing trend of linking manufacturing processes to enterprise functions such as financial control, order management and purchasing, companies are increasingly facing the need to upgrade their processes and automation systems. Therefore, there is a rising demand for Ethernet-ready and single-point HMIs that are capable of being integrated into enterprise-wide communication networks. This trend of increasing use of Ethernet technologies and factory-floor/enterprise level integration has been an important factor in boosting the growth of the HMI market. In addition, technological developments that are in tune with the changing market demands stimulate market growth. For instance, the demand for an efficient and flexible manufacturing system paves the way for easy and quick reconfiguration of machinery and flexible manufacturing processes by reducing time-to-market, enabling mass customisation and initiating just-in-time production. This leads to continuous advancements in HMI technologies and stimulates overall growth in the European HMI market.

However, the present European HMI market is witnessing an overcrowding of participants. This leads to high competition among companies and flooding of the market with low-priced products, creating pricing pressure on the existing participants and impeding market growth. The market is also adversely affected by the continuous appreciation of the Euro compared to the US Dollar, making imports costlier for the foreign customers of HMI who focus mainly on exports. The rising difference between the two currencies also impacts customer confidence and planning, potentially resulting in reduced investment, thus hampering growth and development of the European HMI market.

Currently, there are more than 100 participants in the European HMI market. With HMIs increasingly becoming a commodity product, competition in the European market has been rising. The vast majority of HMI hardware suppliers are based in Europe itself. However, there are also a considerable number of European-based software companies and an increasing number of US-based software suppliers operating in the European market. Since the market is highly technology driven, successful introduction of new products, processes and technologies, and the upgrading of the existing technologies all provide the competitive edge to the market participants.

II. Award Categories & Relevance

The European HMI market is characterised by the presence of over a 100 companies, with some vendors exclusively supplying hardware and software products and others offering integrated solutions. The growing market demand, however, is for integrated solutions, which are driving companies to collaborate with each other in this immensely competitive market. Companies operating in this market are therefore expanding their product and solution offerings and gaining product specialisation, thereby increasing market shares and meeting increased customer demands for better and customised solutions through active participation in mergers and acquisitions (M&As), joint ventures, and alliances. Considerable investment in research and development (R&D) for innovating new products, processes and technologies as well as upgrading existing solutions has always been an area of keen focus for all HMI manufacturers. Because the market is technology driven, successful implementation of these strategies will give an edge to competitors. Another key factor for market excellence is the development of competent technical services and after-sales support to provide uninterrupted production process to customers, as HMIs constitute an essential part of the industrial automation solution. Therefore, companies that have adapted themselves to changing market trends through successful implementation of a combination of these strategies have a competitive advantage over others and are worthy of recognition.

III. Award Recipient : InduSoft

The 2007 Frost & Sullivan Product Innovation Award is presented to InduSoft in the European HMI market. This award is presented in recognition of its revolutionary product innovation to introduce InduSoft Web Studio™ with its latest version of InduSoft Web Studio™ v6.1. This, along with its wide portfolio of other high-quality HMI/SCADA products, ensures InduSoft a significant

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presence in the market. The latest version of InduSoft Web Studio™ v6.1 SP3 is a powerful and well integrated foundation for developing HMI and SCADA applications that support all Microsoft operating systems—including the latest—Microsoft Vista. In the automation and control industry, this capability ensures that it is the only HMI/SCADA solution that runs on almost every type of hardware, which operates with the full advantage of the new features in Microsoft Vista. InduSoft Web Studio™ is structured on a PC-based development system. Therefore, it helps users to easily configure real-time embedded controls. It also enables the user to use a single development software system that can efficiently operate on varied systems, such as remote data acquisition and control room HMI/SCADA systems, as well as historians and database systems. This, in turn, enables users to use the same operating platform and thus simplifies and accelerates the automation of their whole production process.

Company Overview

InduSoft Ltd. was established in 1997. InduSoft's highly efficient skilled personnel have a diverse experience in industrial automation, instrumentation, embedded system and information technology. InduSoft presents pioneering technology through its HMI/SCADA products that help users to access data collected on industrial devices and test and measurement equipment over the Internet. Additionally, InduSoft's HMI/SCADA tools and technologies also enable conversion of users' personal computers, Web browsers, and remote productivity devices such as cell phones, pagers and personal digital assistants (PDAs) into industrial automation and test and measurement systems. InduSoft was the first company to introduce the first HMI/SCADA package for Windows CE® and introduced the first HMI/SCADA package that incorporated Extensible Markup Language (XML) for Web publication. InduSoft's prime strategy is to focus on developing tools and technologies that enable its clients to develop graphical interfaces and integrate Web browsers by utilising the advantage of Internet connectivity. The company has installed more than 20,000 HMI and SCADA applications worldwide. These applications help client organisations to enhance their productivity and also implement maintenance strategies that are predictive and preventative enough to attain the best possible process uptime and availability.

Product Portfolio of InduSoft: A Brief Overview

InduSoft provides a cluster of HMI/SCADA software products for developing applications in industrial, instrumentation and embedded systems, for all Microsoft operating systems. The InduSoft product portfolio comprises the following:

• InduSoft Web Studio™ - It is a powerful and well-integrated collection of automation tools that consist of the units to develop modern HMI and SCADA applications that can run on Windows NT, 2000, XP, CE and CE .NET and in Internet and intranet environment.

• CEView - It is a complete supervisory control, process monitoring and operator interface software for use with the Windows CE® operating system platform and was the first of its type in the world, and introduced by InduSoft. It is enabled to function on diskless handheld, pocket, mobile and embedded PCs, including industrial PDAs. CEView can be ideally used by original equipment manufacturer (OEM) applications. CEView is equipped with an object-oriented database, math functions, report generation, archiving, alarms, batch recipes and interfaces required in PLCs, remote I/O and TCP/IP networking. CEView is based on InduSoft's full scale Windows-based supervisory control and monitoring system that, at present, is being used in over 8,000 installations worldwide.

• RealTime Performance Management - It is an affordable and reliable enterprise solution from InduSoft that enables real-time collection of data throughout the user enterprise. Instead of the conventional use of a typical client/server protocol, Real Time Performance Management uses a browser-based interface: a Web Thin Client, which connects to a server or servers using TCP/IP and maximises connection speeds. Installing applications that feed RealTime Performance Management is a one-time event that makes data available at virtually any number of remote locations for the user. Administrators at every station can independently view all available data and make any necessary changes to the system, anywhere, anytime.

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• Panel Builder™ Import Tool - InduSoft Import Tool for PanelBuilder is a powerful and innovative add-on for InduSoft Web Studio™ (IWS) that can reduce the cost and hassle of modernising the end users' automation system. The user-friendly tool expands the capabilities of plant-floor system where it is installed. Using this highly efficient, fast and intuitive wizard, applications are created that can be imported into InduSoft Web Studio (IWS) after which the features of IWS can be used.

• PanelMate™ Import Tool - It is an efficient application that enables users to migrate existing legacy PanelMate terminals to Windows or Windows CE platforms which are more cost effective. It seamlessly converts the look and feel of the PanelMate or PanelMate Plus application into the Web-enabled, open-standard InduSoft Web Studio environment.

All these HMI/SCADA products from InduSoft are enabled with the advanced ability of InduSoft's pioneering HMI/SCADA technologies that are efficiently equipped for:

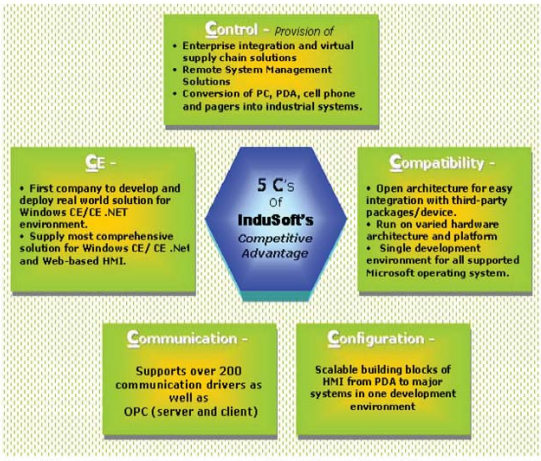
• Efficient data acquisition form various real world devices in real time and highly efficient architecture enabled with the latest standards and technology in the wireless, mobile, distributed and Internet areas.

• Use of the most common and popular Web browsers for displaying and accessing real-time, dynamic and animated graphic screens, trends, recipes and reports.

• Import and export data in Extensible MarkUp Language (XML) format so that they integrate impeccably with databases and the Microsoft Office Suite and are easily compatible with corporate and business applications.

Chart 1.1 illustrates the factors contributing to the competitive advantage of InduSoft in the European HMI Market in 2007.

HMI Market: Factors Contributing to Competitive Advantage of InduSoft's HMI/SCADA Products (Europe), 2007



Source: Frost & Sullivan

Revolutionary Product from InduSoft: InduSoft Web Studio™

InduSoft Web Studio™ is an ideal e-Automation solution for the automation industry. It is a powerful, efficiently integrated collection of automation tools consisting of the foundation units required to develop modern HMI and SCADA applications. InduSoft Web Studio™ runs on native Windows NT, 2000, XP, CE 3.0 and CE .NET 4.0/4.1/4.2 environments. It also runs on both Internet and intranet environments and complies with the industry standards such as Microsoft.NET, OLE for Process Control (OPC, where OLE stands for object linking and embedding), Data Dictionary Entry (DDE), Open Data Base Connectivity (ODBC), XML, Simple Object Access Protocol (SOAP) and Active X. Its working mechanism is based on a simple drag-and-drop, point-and-click development environment; it supports OPC server and client along with various PC control packages and can be used with any common Web browser. Moreover, the system has open connectivity with other Windows-based software systems, which makes it ideal for communication with other management systems such as manufacturing execution system (MES) or enterprise resource planning (ERP).

Evolution of InduSoft Web Studio™: A Brief Glance at the Recent Past

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In 2003, InduSoft released InduSoft Web Studio™ Version 6.0. It had new features for industrial automation, instrumentation, process control and embedded systems running on Windows XP, 2000, NT, CE and CE .NET.

In 2004, InduSoft had introduced the version of InduSoft's Web Studio™ with SCADA/HMI software systems, which runs on both small, embedded machine controls such as mobile phones as well as large, advanced process control systems with thousands of process tags and interfaces to high level enterprise software. This new version of InduSoft Web Studio™ could run on various Microsoft® operating system platforms, including high-availability redundant servers, desktop and industrial PCs, embedded and panel PCs, and on mobile devices such as tablet PCs, handheld PCs, PDAs and mobile phones or smart appliances. Moreover, this advanced version allowed users to create applications ranging in size from 150 tags to large-scale SCADA/HMI, process control or automation applications with an unlimited tag count from a single development environment.

In March 2005, InduSoft upgraded IndSoft Web Studio™ (IWS) Version 6.0 and released its newest service pack (SP4). It consisted of a new OPC Historical Data Access (HDA) server, new Import Wizards and new communication options, along with numerous other enhancements. IWS V6.0 SP4 contained an OPC HDA server for Windows 2000/XP/NT-based systems. This OPC HDA server from InduSoft is enabled with such features .like browsing, synchronous or asynchronous reading, reading on change, writing and deleting. It also supports the annotations and playback interfaces of the HDA standard and complies with the latest OPC Historical Data Access standard 1.20. Moreover, it supports any OPC client that confirms to this standard. IWS V6.0 is also compatible with several Import Wizards that permit automated importing of tag databases and communication interfaces into IWS, such as Beckhoff TwinCAT™ PC-based control software, RSLogix™ 5000 CSV database, OPC server database, ODBC database, CSV database and PanelBuilder™ for PanelView™ applications. InduSoft also aims to make the OPC HDA server compatible with Windows CE® as well in the near future.

Latest Version of InduSoft Web Studio v6.1 SP: Unique Features

InduSoft has been constantly evolving its HMI/SCADA package of InduSoft Web Studio™, while dedicatedly catering to its customers' investment in their application by providing them the most up-to-date facilities of technology in Web, wireless and HMI/SCADA technology. InduSoft had introduced 'InduSoft Web Studio v6.1 SP1', a version of InduSoft Web Studio, in 2006. This version runs on varied configurations of the Windows platform. Using the latest Intel processors and Windows server software, it can operate on powerful redundant workstations as well as serve simple handheld PDAs and 'smart phones' that use mobile technology supported by Windows CE®/Windows. Moreover, it supports Web-based applications and diskless embedded processors and panel PCs. These features, in turn, offer an exclusive advantage in terms of the wide application area coverage for 'InduSoft Web Studio v6.1' over other HMI/SCADA software systems in the market. It supports almost all industrial tools, standards and protocols, including .Net, OPC, ActiveX Data Object (ADO) (Microsoft)), XML, SOAP, ActiveX, FDA 21 CFR Part 11, graphic formats, SQL and Excel. More than 200 communication drivers are available for communication with PLCs, DCSs and similar devices. This new version also supports Microsoft's latest Windows operating system: Vista. Therefore, HMI/SCADA users, OEMs and systems integrators are able to take advantage of the latest Microsoft security improvements and graphical capabilities by adding Vista to their existing systems. This is because, although new PC-based hardware is needed to support Vista, existing InduSoft solutions can also be transferred to the new hardware without any changes. The prime reason why InduSoft has been able to initiate Microsoft Vista support so early is because InduSoft is a Gold Certified Microsoft Partner and has been working with Microsoft since Vista was first announced under its original codename, Longhorn.

InduSoft Web Studio V6.1 SP1 is unique as it provides Visual Basic (VB) scripting. This can be ported to Windows CE® devices such as PDAs or viewed on Web browsers. This feature is unique in the sense that no other HMI/SCADA

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software allows Visual Basic scripts to be executed in a handheld device or a diskless panel PC. InduSoft Web Studio™ V6.1 SP1 includes several other enhancements such as a powerful trend object tool and a remote management tool, sophisticated screen translations, advanced development environment, super symbols interface and database management functions. It also features an optional wizard imports legacy PanelMate® applications, along with the wizard to import legacy PanelView® applications available in its previous versions. The latest version, InduSoft V6.1 SP3, has also been released very recently in 2007.

Figure 1-1 illustrates the unique attributes of InduSoft Web Studio™ in the European HMI Market in 2007.

HMI Market: Unique Attributes of InduSoft Web Studio™ (Europe), 2007

InduSoft Web Studio™ - Unique Features, Trending, Alarm, Graphics

FEATURES

***Equipped with*:**
- Real-time graphical interface that helps to develop industrial automation, instrumentation and embedded systems.
- Devices to publish real-time dynamic and animated graphic screens, trends, alarms, reports and recipes to standard browsers.
- Capabilities for online configuration, debugging and remote application management.
- Wide-ranging development support tools such as message register, error codes, event codes, Database Spy and LogWin.
- A powerful, flexible tags database with Boolean, Real, String, and Array tags, classes and indirect pointers.
- Automatic language translation facility at runtime to produce import/export recipes, reports and real-time data in XML format.
- An advanced math library with more than 100 standard functions.
- Multi-level security check for applications, including use over intranets and the Internet.
- Tools to configure applications in conformance with the FDA 21 CFR Part 11 regulation.

***Supports*:**
- Windows desktop applications (such as Microsoft Word and Excel); interfaces with third-party packages such as Java, C, C++ and Visual Basic.
- Multi-dimensional interface in the Web Thin Client environment
- ActiveX for Web Thin Clients.
- Viewing multiple Web Thin Client applications from a common Web Browser (such as Microsoft Internet Explorer or Netscape) through the Internet/Intranet and exchange data with a server using a TCP/IP protocol.
- Data exchange between wireless and mobile devices.
- Internationalisation by use of Unicode.

TRENDING

***Equipped with*:**
- Devices to distribute information throughout the network for easy monitoring on application screens or through Web browsers.

***Supports*:**
- Online tracking or historical trending of process behaviour and sending information across a network for monitoring on screens or Web browsers.

ALARMS

***Equipped with*:**
- Highly efficient alarm management system to send alarms to utilities such as a screen, e-mail and Web browser and archive to the printer.
- Technology to provide free format alarm messages; uses secondary search keys and grants accesses through groups or tags.

***Supports*:**
- Mechanism for users to store notes after acknowledgement of alarms.
- Archiving of alarms to a file, printer or to a database.
- Filtering of alarms by categories at runtime.
- Filtering, sorting or colour sorting alarms for easier visual interpretation.

GRAPHICS

***Equipped with*:**
- Full-featured screen objects and dynamics
- Customizable object properties such as bar graphs, colour, resizing, blinking, animation, scale, fill, positioning, rotation, commands, hyperlinks, combo-boxes and text input and output.
- An extensive symbol library to simplify development.

***Supports*:**
- An object-oriented environment that facilitates development of simple application and re-usability of screen and object.
- Import of graphics from more than 15 different formats for enhanced and realistic screens.

Competitive Advantage of InduSoft Web Studio™

InduSoft Web Studio™ is a very potent collection of rapid application configuration environment (RACE) tools that offer both Web and wireless integration available in the present European HMI market. It can be used to configure native applications that are compatible with all supported Windows operating systems and Web-based HMI/SCADA applications – with no other tools required.

InduSoft' Web Studio™ is enabled with a complete HMI/SCADA development environment for all of Microsoft's operating systems. The functionality that is available on Microsoft Vista and XP (such as SQL interface to relationship database) is also available on Windows CE and Windows Mobile. InduSoft Web Studio™ is the only HMI/SCADA development environment that does not require two separate development environments; that is, one for Windows Vista, XP and 2000 and another for Windows CE and Windows Mobile.

InduSoft Web Studio™ also provides customers with the flexibility to integrate their current operating environment. For example, InduSoft Web Studio™ has over 240 drivers to communicate with various PLCs along with OPC clients and the server. It is one of the few HMI/SCADA packages that include an OPC server to allow customers to integrate their current HMI/SCADA packages such as Wonderware, Rs/View, Copa-Data and Progea with InduSoft Web Studio™. InduSoft Web Studio™ OPC server can communicate with the OPC client in these packages to exchange data. Moreover, InduSoft Web Studio™ publishes its Open Application Programming Interface (API) so that the clients can access the database, write their own driver or change the look and feel of InduSoft Web Studio™ according to their requirements.

In addition, InduSoft Web Studio™ is one of the few HMI/SCADA packages on the market for which an initial version 1.0 application written in InduSoft Web Studio™ would run seamlessly with impeccable precision on its latest version, InduSoft Web Studio V6.1 SP3. InduSoft always keeps backward compatibility with all its previous release so that the newer releases can be easily integrated with them.

InduSoft Web Studio™ is also the richest Web-based HMI/SCADA package available on the market in terms of its features. Not only does it enable display of HMI/SCADA screens in a standard Web browser, but it also allows

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interacting with applications on a standard Web browser assuming that the user has the right security privileges to do so. Security is a fundamental design consideration in the InduSoft Web Studio package.

Other advantages of InduSoft Web Studio™ include the following general features:

• Open Architecture: It features a complete Open API for easy integration with existing and future applications.

• Extensibility: The features of InduSoft Web Studio™ can be extended to other InduSoft HMI/SCADA applications as well. 3-D animation, Web capability historical data, XML reports and so on can be added to the existing InduSoft PanelBuilder™ for users (with existing InduSoft PanelBuilder™ applications) who do not want to alter the originals, but still take advantage of new technology of InduSoft Web Studio™. This is because existing applications can be converted to InduSoft Web Studio™ by – InduSoft Import Tool for PanelBuilder™.

InduSoft Web Studio™ - a Revolutionary Product with Widespread Customer Acceptance

Since its inception, InduSoft Web Studio™ has been growing at a rate of 50 to 55 per cent every year with an installed base of over 22,000 worldwide in 2006. InduSoft Web Studio™ has revolutionised the concept of how customers' interact with their traditional HMI/SCADA applications. It is a private brand which has gained widespread user acceptance and has been labelled by many renowned client companies in the European market. For OEMs, machine builders, systems integrators and end users, InduSoft Web Studio™ simplifies the HMI/SCADA development process. By using a single development tool, engineers can generate operator displays, Visual Basic scripts, trends, alarms, logs and other functions that can run on desktop computers, panel-mounted displays and handheld devices. These can be accessed from Web-based PCs and handheld devices without the requirement of any other tool to make applications run in all these environments.

The InduSoft Web Studio™ development environment is constructed so as to make it highly user friendly. It consists of the following components to help user operations:

• Shortcut Toolbar – It helps to develop and manage applications more efficiently.

• Execution Toolbar – It enables users to execute or stop local and remote applications without leaving the development environment.

• Graphical Toolbar – It consists of a simple point-and-click graphic design in the object-oriented screen editor.

• Workspace – It allows for navigation between modules and screens and thereby helps to improve ability of the user to reuse work.

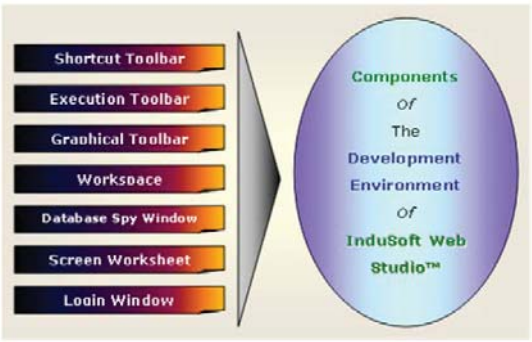
• Database Spy Window - It facilitates easy reading and debugging of tasks, expressions, functions and checkpoints.

• Screen Worksheet - It helps to quickly and easily design complex applications using visual layout tools such as cut and paste, drag-and-drop and so on.

• LogWin Window – It helps to view execution logs, visually trace programme topics or search references for any particular tag.

Chart 1.2 illustrates the components of the development environment of InduSoft Web Studio™ in the European HMI Market in 2007.

HMI Market: Composition of the Development Environment of InduSoft Web Studio™ (Europe), 2007



Source: Frost & Sullivan

InduSoft Web Studio™ is a complete HMI and SCADA package comprising alarms (both on-line and historical),

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trends (both on-line and historical), recipes, scheduler, reports and tools that enable scripting (both InduSoft scripting and Visual Basic scripting). It is equipped with communication drivers, OPC (client and server), Web capability (including remote operations over the Web), database interface using SQL commands, remote management capability and many more features.

The development environment that is used to build large-scale highly redundant SCADA applications is the same as the one used to build HMI applications for mobile devices. The total market included over 700 million mobile workers worldwide in 2005 and is expected to grow to nearly 880 million in 2009. Further, Europe is growing at a faster rate than the rest of the world. Even traditional SCADA applications are being augmented to use mobile technology. In addition, InduSoft Web Studio™ has the strongest offering on the Web for organising HMI, SCADA and real-time performance monitoring applications. The development environment allows saving the applications as an HTML page and enables users to view it from any client system. According to the current market trend, many HMI manufacturers in Europe are looking for ways to make their machines more intelligent and smart. This in turn requires them to offer services on the Web to augment their standard HMI interface. Therefore, InduSoft Web Studio™ is being used in many such applications to service the machines remotely before sending a technician in person, as the Web capabilities and remote debugging of InduSoft Web Studio™ present the ideal solution for service-oriented applications.

InduSoft Web Studio™ - A League Ahead of its Competitors

The HMI/SCADA software market has more than 100 participants. However only a select few participants offer complete HMI/SCADA solutions compatible for mobile devices and the Web. Vendors that do offer such solutions in this market vary widely in terms of functionality of the HMI/SCADA applications and on the particular platforms. InduSoft offers InduSoft Web Studio™, a powerful collection of automation tools consisting of all the building blocks needed to develop HMIs, SCADA systems and embedded instrumentation and control applications. Some competitors in the European market have been trying to follow suit. For instance, a prominent market participant is in the process of merging its 'ProTool' and 'WinCC' products into 'WinCC Flex'; however, all the functions of these various tools are not offered in one complete environment so far. While another key market participant has also initiated the process, it does not offer a Windows CE or Mobile HMI/SCADA application environment. Again, some other participants operate on OPC to the core architecture that is not always conducive to the Mobile or Windows CE environment.

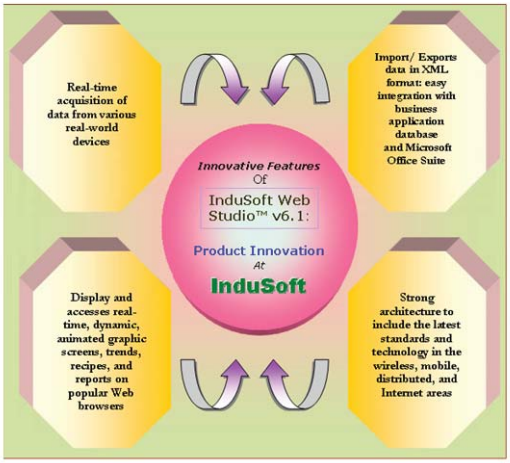
InduSoft's laboratory certification tests prove that InduSoft Web Studio™ software runs effectively on a wide spectrum of industrial computers from a number of leading vendors. In fact, InduSoft Web Studio HMI/SCADA software is offered by many industrial control vendors under license from InduSoft, often under private labels. Thus InduSoft, empowered with the family of innovative industrial software products, develops applications for industrial automation, instrumentation and embedded systems using Microsoft-supported operating systems and leads the way in the competitive European HMI market.

IV. Conclusion

InduSoft is a leading supplier in the European HMI market with an impressive portfolio of highly innovative products (such as InduSoft Web Studio™ v6.1) punctuated by high quality and performance.

Chart 1.3 illustrates the key features of InduSoft Web Studio™ v6.1 in the European HMI market in 2007.

HMI Market: Key Features of InduSoft Web Studio™ v6.1 - Product Innovation, InduSoft (Europe), 2007



Source: Frost & Sullivan

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2007 FROST & SULLIVAN
Business Development Strategy Leadership Award

Web-Ready InduSoft® Realize Your Potential

By introducing innovative designs and technological revolution, the company has overcome competition while still attracting customers with its highly innovative products. Its commitment to R&D and quality control has enabled the company to stay ahead of customer expectations. These attributes have given InduSoft an advantage over other participants in the HMI market. Thus, a strong market presence and a technological instinct for path-breaking product innovation have enabled the company to sustain and grow in the highly competitive European HMI market. This distinction makes InduSoft the worthy recipient of the Frost & Sullivan 2007 European Product Innovation Award.