

MARKET SHARE

Synopsys continues to be uncertain about their future direction. In the meantime Cadence has put together an ESL flow that when paired with Atrenta's Silicon Virtual Prototype completes the ESL Flow. Mentor's strong position in the Embedded Tools market keeps them in the running. All they need to do is take a position in the Software Virtual Prototype market and they will be in good shape. With Synopsys' weaker position in the Emulation market, Cadence and Mentor would then be able to dominate the ESL flow.

MARKET GROWTH

With the late entry of the ESL flow this year there was no time to see the expected ESL hockey stick in 2012. As the Upper Mainstream users moved up from RTL to ESL they still did not find a complete commercial ESL flow available.

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