

Neither Stellar Nor Stagnant

Six in 10 integrators were able to move ahead in 2012 and counted an increase in systems integration revenue; but one-third slipped back — showing that the security marketplace is not yet where it was pre-recession.

By Laura Stepanek, Editor

A 9 percent decrease in the 2012 revenue for *SDM's* Top Systems Integrators is a deceiving number because individual company results did not recede to that extent. By all accounts, systems integrators described 2012 as average to improved — at least moderately better than the dismal results they encountered in 2011. While some companies found it “challenging,” others experienced the opposite. Most were in the middle — financial performance was neither stellar nor stagnant, but “acceptable” compared with the past few years.

“2012 was another challenging year for the larger commercial integrated systems business. It wasn’t worse than 2011 but about the same,” notes No. 25-ranked ASG Security, Beltsville, Md. “There are still fewer projects, less funding and great pressure on margins. However, the low and mid markets performed very well for us again; specifically, a continued great resurgence in residential sales with excitement around our enhanced service platform. Small business was also a continued strong growth segment for the company, led by enhanced intrusion sales and cloud-based video services.” ASG Security reported \$20.9 million in 2012 North American systems integration revenue, 6 percent less than in 2011. However, the company simultaneously climbed on the just-released *SDM* 100, with 12.4 percent better recurring monthly revenue — an outward sign of the company’s comments regarding their stellar residential program.

Revenue classified as North American systems integration revenue fell from \$6.91 billion in 2011, to \$6.29 billion in 2012 — even though 10 more companies were included in the report. However, for comparison purposes, *SDM* measures the top 100 companies’ 2011 integration revenue (\$6.88 billion) against the top 100’s 2012 integration revenue (\$6.24 billion). Partly responsible for the decline is the removal of ADT from the Top Systems Integrators Report, as this company was split in 2012 into separate businesses that handle residential

and small commercial (ADT) and commercial security (Tyco Integrated Security). In addition, *SDM* is reporting a modified, but lower, estimate for Siemens Industry Inc. based on new information.

For systems integrators in general, they saw a marked improvement in spending availability in their markets. In most cases, this translated to higher sales, greater revenue, and even better profits.

Business was “BETTER than 2011,” remarks No. 33-ranked MidCo Inc., located in Burr Ridge, Ill. “Business revenue and profits are growing.”

Among the Top Systems Integrators ranked in this report, for which year-to-year comparisons could be made, 62 percent reported increased systems integration revenue. But as many as one-third (33 percent) of integrators reported decreased revenue from systems integration. So, many are still struggling against challenges in the market, such as minimized spending by clients, very little to no new construction in their territories, and heated competition, among other factors.

“The market was flat across all segments,” remarks No. 6-ranked Johnson Controls Inc., based in Milwaukee.

“The market was strong, but much more competitive, with overall gross margins declining,” states Genesis Security Systems LLC, Germantown, Md., ranked No. 34.

While the challenges and hurdles to better growth in systems integration revenue continue, there is no doubt that some improvement was seen between 2011 and 2012, and it continues into the current year. Among *SDM's* Top Systems Integrators, 78 percent expect revenues to increase in 2013 compared with last year. ■



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To find this article online, as well as previous years' editions of the Top Systems Integrators Reports, visit www.SDMmag.com/Top-Systems-Integrators-Report.

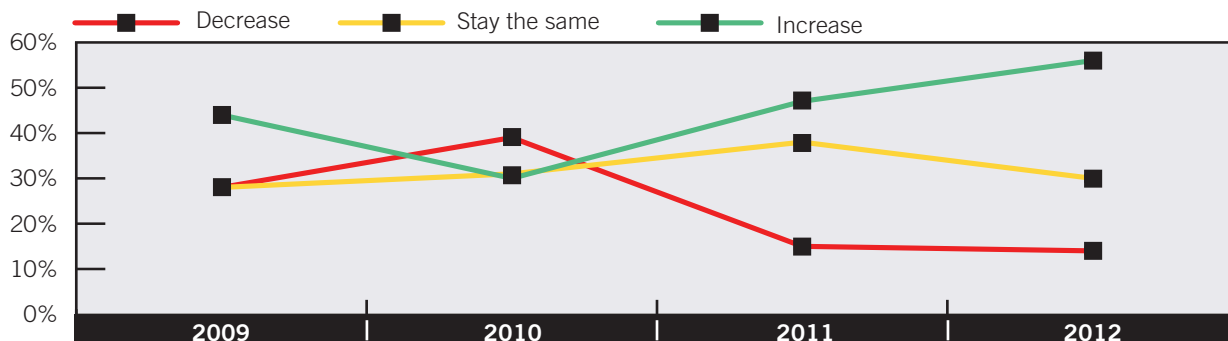
2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
1		Tyco Integrated Security, SimplexGrinnell Boca Raton, Fla.	\$2,535,680,000 e	na	na	na	na	10,000e	na
2	2	Siemens Industry Inc. Buffalo Grove, Ill.	\$546,000,000 e	na	\$4,141,472	\$250	edu, govt, corp	na	100
3	4	Diebold Security North Canton, Ohio	\$540,000,000	na	\$5,300,000	na	na	na	110
4	5	Stanley Convergent Security Indianapolis, Ind.	\$360,000,000 e	na	na	na	na	8,375	100
5	7	Convergent Technologies LLC Schaumburg, Ill.	\$278,159,685	10,000	\$9,500,000	\$10,500	law, health, corp	1,199	29
6	6	Johnson Controls Inc. Milwaukee, Wis.	\$250,600,000	na	\$14,000,000	\$150,000	health, transport, correctional	695	35
7	8	HBE, a Kratos Company San Diego, Calif.	\$184,830,000	na	\$18,000,000	na	na	na	32
8	10	G4S Technology LLC Omaha, Neb.	\$109,377,000	212	\$19,500,000	\$1,500	govt, utility, transport	652	18
9	9	Schneider Electric Carrollton, Texas	\$89,810,000	200	\$6,500,000	\$10,000	govt, health, airport	1,468	15
10		Vector Security Inc. Pittsburgh, Pa.	\$73,500,000	4,665	na	na	retail, industrial, health	1,106	38
11		Protection 1 Romeoville, Ill.	\$70,300,000	na	\$2,458,000	\$2,500	retail, finance, corp	2,538	74
12	11	Kastle Systems Springfield, Va.	\$68,000,000	na	na	na	corp, govt, finance	na	8
13	13	NAVCO Anaheim, Calif.	\$44,624,550	na	\$750,000	\$10,000	finance, retail, industrial	134	10
14	16	AFA Protective Systems Inc. Syosset, N.Y.	\$43,897,600	6,400	\$920,000	\$200	retail, airport, corp	446	19
15	14	Tri-Signal Integration Inc. Sylmar, Calif.	\$39,856,000	530	\$2,800,000	\$9,867	health, corp, edu	206	8
16	15	RFI Communications & Security Systems San Jose, Calif.	\$38,221,291	1,294	\$2,055,046	\$4,265	corp, health, edu	268	5
17	17	Tech Systems Inc. Duluth, Ga.	\$33,783,595	950	\$1,318,773	\$20,000	corp, health, finance	166	3
18		Securadyn Systems LLC Carrollton, Texas	\$33,092,513	na	\$1,800,000	\$5,000	utility, health, edu	147	7
19	23	SFI Electronics LLC / Universal Protection Security Systems LP Santa Ana, Calif	\$30,340,717	715	\$850,000	\$1,000	health, utility, corp	130	13
20	18	VTI Security Integrators Burnsville, Minn.	\$29,861,238	na	\$1,200,000	\$5,000	health, govt, utility	135	6
21		Entech Sales & Service Inc. Dallas, Texas	\$23,461,011	25	\$1,500,000	\$1,500	telecommunications, corp, healthcare	197	5
22	22	Security Corporation Novi, Mich.	\$22,188,679	na	na	na	finance, correctional, utility	110	3

No. 1 – First-time ranking on the Top Systems Integrators Report since separating from ADT in 2012. Includes Tyco Integrated Security (revenue estimated by *SDM*) and SimplexGrinnell (North American systems integration revenue of \$949 M reported to *SDM*). ■ No. 2 – *SDM*'s 2010 Systems Integrator of the Year. North American systems integration revenue is estimated by *SDM*. ■ No. 3 – *SDM*'s 2011 Systems Integrator of the Year. ■ No. 5 – *SDM*'s 2012 Systems Integrator of the Year. ■ No. 6 – *SDM*'s 2009 Systems Integrator of the Year. ■ No. 7 – The integration of the Ingersoll Rand system integration division greatly enhanced the company's footprint in North America, giving it a total of 32 offices and 600 employees. ■ No. 8 – *SDM*'s 2008 Systems Integrator of the Year (Adesta). ■ No. 9 – Company leveraged its Security Center of Excellence on complex integrated solutions. ■ No. 11 – Most significant accomplishment in 2012 was to attain the highest level of national account growth the company has seen to date. ■ No. 16 – Acquired Microsoft Dynamics AX as RFI's new ERP platform to support the company's future growth while gaining workflow efficiencies and overall experience. ■ No. 17 – Company built its reputation on service after the sale with guaranteed response time and functionality; it is one of the ISO Quality Objectives. In 2012, company had 16,467 service calls; of those, the company missed the guaranteed response time on only 11 calls and missed restoring immediate functionality on 19 calls. That resulted in a success rate of 99 percent accuracy. ■ No. 18 – Acquired SecureNet Inc. and Surveillance Specialties Ltd. ■ No. 19 – Record sales and earnings. Opened two new branch offices in California. ■ No. 20 – Company made its first acquisition of another security integrator (SIC). ■

e = *SDM* estimate. na = not available. Abbreviations to markets: airport = airports; corp = corporate office space; correctional = correctional; edu = education/campus; entertainment = entertainment/sports venues; finance = financial/banking; gaming = casinos/gaming; govt = government; health = healthcare; hospitality = hotels/hospitality; industrial = industrial; law = law enforcement; retail = retail/restaurants; transport = transportation/distribution; utility = utilities/critical infrastructure.

Much Improved Profit in 2012

Top Systems Integrators were asked, "Did your company's net profit margin increase, decrease or stay about the same in 2012 compared with 2011?"



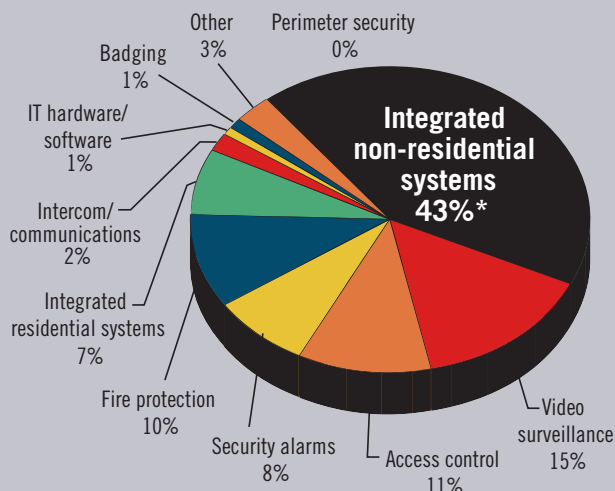
Top Systems Integrators noted much-improved net profit margins compared with the previous year. Well more than half of integrators (56 percent) recorded an increase in 2012, compared with less than half in 2011.

**percentage of Top Systems Integrators indicating each answer; based on 118 responses*

Source: SDM Top Systems Integrators Report, July 2013

Integrators' Sales Revenue by Product Category

Top Systems Integrators were asked to break down their 2012 revenue by type of product. The majority is earned from integrated non-residential systems that combine two or more different technology solutions. No significant changes were recorded from 2011 to 2012 in the percentage of revenue from products.

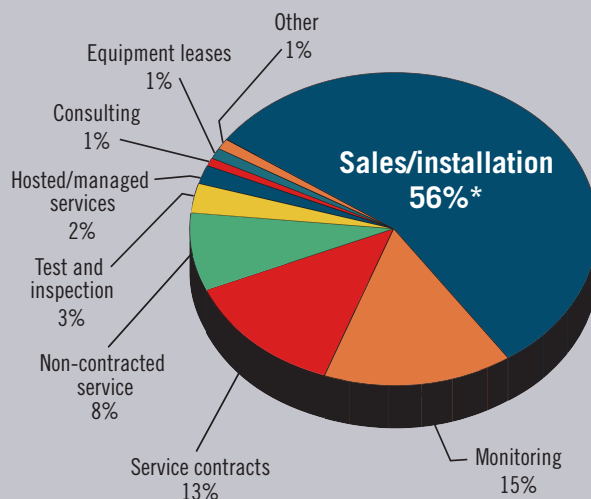


**percentage of Top Systems Integrators' 2012 sales revenue; based on 100 responses.*

Source: SDM Top Systems Integrators Report, July 2013

Integrators' Sales Revenue by Service Category

Top Systems Integrators were asked to break out their 2012 revenue by type of service. The majority is earned from sales and installation of engineered systems. No significant changes were recorded from 2011 to 2012 in the percentage of revenue from services.



**percentage of Top Systems Integrators' 2012 service revenue; based on 119 responses.*

Source: SDM Top Systems Integrators Report, July 2013

2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
23	38	SIGNET Electronic Systems Inc. Norwell, Mass.	\$22,000,000	850	\$1,550,000	\$780	govt, edu, law enforcement	83	3
24	34	DTT Los Angeles, Calif.	\$21,350,583	2,000	\$30,000	\$2,000	na	268	3
25	19	ASG Security Beltsville, Md.	\$20,927,000	18,735	\$419,646	\$149	retail, industrial, govt	922	18
26	20	Securityhunter Inc. Baltimore, Md.	\$20,517,540	50	\$5,615,711	\$2,301	govt, health, retail	19	1
27		Sound Incorporated Naperville, Ill.	\$20,272,096	250	\$604,000	\$2,000	edu, health, industrial	92	1
28	109	Interface Security Systems Holdings Inc. Earth City, Mo.	\$20,190,000	4,800	\$500,000	\$0	retail, hospitality, corp	826	22
29	21	Allied Fire & Security Spokane, Wash.	\$20,000,000	150	\$1,200,000	\$1,000	health, govt, industrial	120	3
30	24	Northland Control Systems Inc. Fremont, Calif.	\$19,000,000	na	\$2,500,000	\$5,000	corp, edu, health	na	5
31	31	Intertech Security Pittsburgh, Pa.	\$18,501,429	530	\$1,400,000	\$5,000	na	144	7
32	35	Unlimited Technology Inc. Chester Springs, Pa.	\$18,200,000	245	\$1,900,000	\$3,500	utility, corp, transport	51	4
33	26	MidCo Inc. Burr Ridge, Ill.	\$18,000,000	1,100	\$2,175,000	\$10,000	corp, edu, industrial	107	2
34	25	Genesis Security Systems LLC Germantown, Md.	\$17,500,000	350	\$5,400,000	\$5,000	finance, corp, health	52	1
35	37	Intelligent Access Systems Garner, N.C.	\$16,054,512	480	\$1,300,000	\$10,000	utility, health, edu	62	6
36	28	ARK Systems Inc. Columbia, Md.	\$16,000,000	200	\$588,000	\$2,000	edu, health, hospitality	117	3
37	36	SDI Chicago, Ill.	\$15,718,042	8	\$1,756,150	\$93,300	airport, transport, govt	112	6
38	39	Low Voltage Contractors Inc. Minneapolis, Minn.	\$15,642,159	711	\$517,000	\$150	corp, health, industrial	70	2
39	30	Idesco Corporation New York, N.Y.	\$15,204,650	24	\$1,600,000	\$350,000	na	43	1
40	29	SSD Alarm Systems / Kern Security & Fire / Alpha Security & Fire Anaheim, Calif.	\$15,156,045	na	na	na	na	na	12
41	49	Koorsen Security Technology Indianapolis, Ind.	\$13,918,887	60	\$2,500,000	\$10,000	corp, health, utility	42	2
42	43	Integrated Security Technologies Herndon, Va.	\$13,323,713	285	\$2,837,063	\$1,553	govt, edu, health	65	2
43	33	BCI Technologies Inc. Grand Prairie, Texas	\$12,700,000	na	na	na	na	79	4
44	42	CONAVA Inc. Edmonton, Alberta	\$12,515,040	403	\$1,360,300	\$195	govt, tech, industrial	59	2
45	32	MSE Corporate Security Branchburg, N.J.	\$12,388,060	50	\$75,000	\$3,000	retail, govt, edu	55	4

No. 23 – Secured a \$2.2 million K-12 project including integrated security, AV, telecommunications, intercommunications, and more. ■ No. 24 – Established a cloud-based portal to aggregate all loss prevention and business intelligence solutions for clients. ■ No. 25 – Company continued to benefit from increased market penetration and greater sales force adoption across all of its markets with the ASG Connect brand, an enhanced interactive service platform for intrusion systems. Also launched ASG Video, a new hosted video service, in 2012. Sold more than 1,000 channels of RMR-generating video in six months and was recognized by Axis Communications as their Video Hosting Partner of the Year. ■ No. 26 – Entered the automated vehicle access control market and gained market share within the Department of Defense. ■ No. 28 – Acquisition and successful integration of Westec Intelligent Video Surveillance ■ No. 29 – Restructure in 2010/2011 helped facilitate very strong bottom line for company. ■ No. 33 – Formed Data Division for managed services entry. ■ No. 34 – Moved to a new headquarter, doubling square footage to 13,000 sq. ft. ■ No. 35 – 20+ percent growth while developing a new corporate staff team. ■ No. 37 – Chosen by Minneapolis-St. Paul International Airport to replace their current CCTV system with an airport-wide iVSN surveillance system. Company has a 20-year track record of delivering highly integrated solutions for large airport and public safety clients. ■ No. 38 – Designed and built a “virtual showroom” that has live interactive systems on all products the company sells and services. ■ No. 42 – Opened a new office location in Virginia Beach, Va. ■ No. 44 – Undertook a large, complex project that included 245 doors, 90 video surveillance cameras, Pivot3 vSTAC architecture, Cisco switching and network layer and more than 500 intrusion devices — which helped to showcase the company's project management, engineering and enterprise IT capabilities and experience. ■ No. 45 – In negotiations to expand geographically into Midwest region. ■

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Largest Project Winners

Company	Value of Largest Project	2013 Rank	Company	Value of Largest Project	2013 Rank
G4S Technology LLC	\$19,500,000	8	Enterprise Security Inc.	\$1,000,000	69
HBE, a Kratos Company	\$18,000,000	7	EO Integrated Systems Inc.	\$980,000	97
Johnson Controls Inc.	\$14,000,000	6	Qualified Systems Contracting Inc.	\$975,000	71
Convergint Technologies LLC	\$9,500,000	5	The Protection Bureau	\$925,000	51
Schneider Electric	\$6,500,000	9	AFA Protective Systems Inc.	\$920,000	14
Securityhunter Inc.	\$5,615,711	26	PASS Security	\$900,000	74
Genesis Security Systems LLC	\$5,400,000	34	Security Equipment Inc.	\$880,000	58
Diebold Security	\$5,300,000	3	SFI Electronics LLC / Universal Protection Security Systems LP	\$850,000	19
Siemens Industry Inc.	\$4,141,472	2	Firstline Security Systems Inc.	\$840,000	70
Advanced Electronic Solutions	\$3,450,000	53	NAVCO	\$750,000	13
Advanced Cabling Systems	\$3,200,000	48	Ferndale Electric Systems Integration Division	\$750,000	65
Integrated Security Technologies	\$2,837,063	42	Sentry Communications & Security	\$750,000	76
Tri-Signal Integration Inc.	\$2,800,000	15	ASCC Inc.	\$710,000	66
Northland Control Systems Inc.	\$2,500,000	30	Access Control Consultants	\$655,000	85
Koorsen Security Technology	\$2,500,000	41	Sound Incorporated	\$604,000	27
Protection 1	\$2,458,000	11	Electronic Security Systems	\$600,000	95
MidCo Inc.	\$2,175,000	33	Engineered Security Systems	\$600,000	102
Minuteman Security Technologies, Inc.	\$2,100,000	68	ARK Systems Inc.	\$588,000	36
RFI Communications & Security Systems	\$2,055,046	16	SecurAlarm Systems Inc.	\$550,000	92
Mountain Alarm	\$2,000,000	55	American Alarm & Communications	\$548,888	52
Midstate Security Company	\$1,905,661	72	Sonitrol New England	\$540,483	84
Unlimited Technology Inc.	\$1,900,000	32	Low Voltage Contractors Inc.	\$517,000	38
Securadyne Systems LLC	\$1,800,000	18	Interface Security Systems Holdings Inc.	\$500,000	28
ATCI Communications Inc.	\$1,800,000	57	APL Access & Security Inc.	\$500,000	75
SDI	\$1,756,150	37	AVS Technology	\$500,000	87
Idesco Corporation	\$1,600,000	39	All Systems Designed Solutions Inc.	\$461,046	124
Redrock Security & Cabling Inc.	\$1,566,784	94	Electronic Security Concepts LLC	\$460,000	93
ArCom Systems Inc.	\$1,563,712	61	Per Mar Security Services	\$451,540	82
SIGNET Electronic Systems Inc.	\$1,550,000	23	Strategic Security Solutions	\$433,028	115
Entech Sales & Service Inc.	\$1,500,000	21	ASG Security	\$419,646	25
Simpson Security Systems Inc.	\$1,450,000	104	Sonitrol of Lexington / Bates Security	\$390,855	89
Intertech Security	\$1,400,000	31	Life Safety Engineered Systems Inc.	\$388,000	73
CONTAVA Inc.	\$1,360,300	44	Advanced Control Concepts Inc.	\$369,081	79
Tech Systems Inc.	\$1,318,773	17	Guardian Protection Services	\$357,078	60
Intelligent Access Systems	\$1,300,000	35	American Security Systems Inc.	\$350,000	101
SDT Inc.	\$1,280,000	50	Habitec Security	\$350,000	108
ACT	\$1,269,458	46	Security Integrations	\$341,000	47
VTI Security Integrators	\$1,200,000	20	Advance Technology Inc.	\$325,000	64
Allied Fire & Security	\$1,200,000	29	CGL Electronic Security Inc.	\$320,000	80
GSI	\$1,200,000	54	Yarnell Security Systems	\$300,000	110
CTSI	\$1,200,000	56			
MSA Systems Integration	\$1,100,000	113			

These 82 companies reported having the highest-value security projects started in 2012. (Note: Projects below \$300,000 are not ranked here.) Three of the top 10 companies did not report project sizes as requested by *SDM*.

Source: *SDM Top Systems Integrators Report, July 2013*

2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
46	53	ACT Clifton, N.J.	\$11,982,344	na	\$1,269,458	\$4,023	finance, edu, health	36	1
47	52	Security Integrations Albany, N.Y.	\$11,660,445	375	\$341,000	\$7,500	utility, correctional, govt	31	3
48	45	Advanced Cabling Systems North Little Rock, Ark.	\$11,500,000	350	\$3,200,000	\$5,000	corp, edu, finance	105	3
49	55	Safeguard Security Scottsdale, Ariz.	\$11,448,000	na	na	na	na	na	3
50	41	SDT Inc. Newtown, Pa.	\$11,391,000	317	\$1,280,000	\$1,500	Pharma, law, airport	88	1
51	46	The Protection Bureau Exton, Pa.	\$11,250,000	550	\$925,000	\$99	property, utility, retail	90	3
52	54	American Alarm & Communications Arlington, Mass.	\$11,211,737	3,421	\$548,888	\$50	property, finance, corp	193	5
53	48	Advanced Electronic Solutions College Point, N.Y.	\$10,831,000	87	\$3,450,000	\$175,000	gaming, correctional, govt	54	3
54	62	GSI Troy, Mich.	\$10,546,197	335	\$1,200,000	\$180	corp, utility, industrial	46	2
55		Mountain Alarm Ogden, Utah	\$10,072,975	1,488	\$2,000,000	\$100	utility, edu, health	142	6
56	40	CTSI Chantilly, Va.	\$9,965,936	439	\$1,200,000	\$5,000	govt, health, edu	39	1
57		ATCI Communications Inc. Miami, Fla.	\$9,625,600	30	\$1,800,000	\$25,000	na	43	3
58	51	Security Equipment Inc. Omaha, Neb.	\$9,424,237	822	\$880,000	\$99	edu, finance, corp	140	4
59	73	Tele Tector of Maryland Columbia, Md.	\$8,962,632	21	\$86,513	\$930	health, govt, edu	40	1
60	57	Guardian Protection Services Warrendale, Pa.	\$8,821,132	3,335	\$357,078	\$0	industrial, health, edu	858	13
61	74	ArCom Systems Inc. North Little Rock, Ark.	\$8,769,260	184	\$1,563,712	\$1,188	health, edu, industrial	56	3
62	56	Operational Security Systems Inc. Atlanta, Ga.	\$8,751,938	395	\$171,000	\$0	edu, health, corp	48	2
63	44	Dallas Security Systems Inc. & DSS Fire Inc. Dallas, Texas	\$8,700,000	850	\$250,000	\$500	health, corp, govt	188	1
64		Advance Technology Inc. Scarborough, Maine	\$8,067,030	544	\$325,000	\$2,000	finance, health, edu	35	2
65	59	Ferndale Electric Systems Integration Division Ferndale, Mich.	\$7,990,520	278	\$750,000	\$2,000	industrial, health, govt	28	1
66		ASCC Inc. Cranberry Township, Pa.	\$7,799,400	725	\$710,000	\$2,500	health, edu, retail	87	1
67	95	F.E. Moran Inc. Alarm and Monitoring Services Champaign, Ill.	\$7,678,077	4,087	\$116,101	\$100	corp, finance, edu	183	7

No. 47 – Company had an outstanding year for sales and the installation of cutting-edge technologies. ■ No. 49 – Completed a large \$3.2 M project with integrated access and security and data center. ■ No. 50 – Company was successful in closing two key accounts. Also invested heavily in training of field staff (product and installation). ■ No. 51 – Increased managed services business. ■ No. 53 – Company was able to ensure minimal downtime (where possible) during a natural disaster and established communications with top clients for emergency response. ■ No. 54 – Expanded business with Quicken Loans in downtown Detroit. ■ No. 55 – Refinanced the company and with additional capital bought several other companies, growing RMR significantly. ■ No. 57 – Acquired great talent and one competitor. ■ No. 58 – Company expanded its hosted and managed services. ■ No. 60 – Placed increased focus on customer base by recognizing and meeting the demands of the base for home automation services. ■ No. 61 – Closed the contract for the Northeast Arkansas Baptist Medical Center in Jonesboro, Ark. for \$2.6 million. ■ No. 62 – Strong business controls allowed the management of cash flow and maintenance of stability in spite of the worst new construction environment the company has seen in decades. ■ No. 63 – Contracted to install IP cameras viewing the printing process of highly sensitive financial reports. Installed cameras from lifts while machines were in use. ■ No. 64 – 45 new customers. ■ No. 66 – Installed more than 70 life-safety solutions in healthcare and one contract for a multi-site customer that consisted of more than 200 video surveillance installations. ■ No. 67 – Company doubled the number of employees and experienced significant RMR growth. ■

e = SDM estimate. na = not available. Abbreviations to markets: airport = airports; corp = corporate office space; correctional = correctional; edu = education/campus; entertainment = entertainment/sports venues; finance = financial/banking; gaming = casinos/gaming; govt = government; health = healthcare; hospitality = hotels/hospitality; industrial = industrial; law = law enforcement; retail = retail/restaurants; transport = transportation/distribution; utility = utilities/critical infrastructure.

Top Systems Integrators' Totals

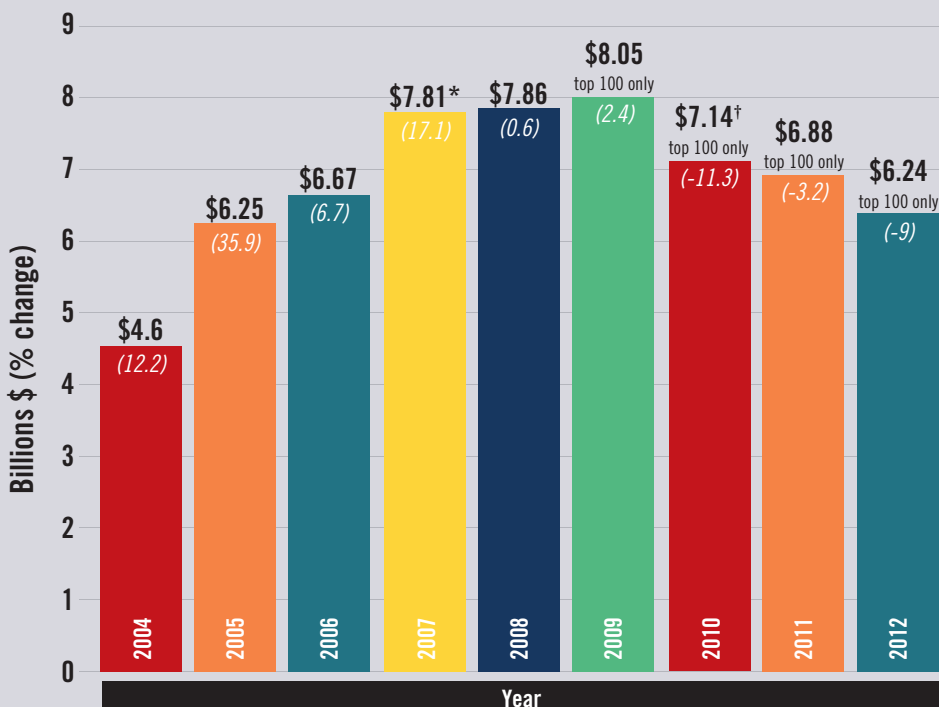
2012

Total North American systems integration revenue:	\$6.29 billion
New systems started:	179,199
Total full-time employed:	37,275
Business locations operated:	970

Total North American revenue from systems integration for the 124 largest integrators reached \$6.29 billion in 2012 from solutions such as design, project management, product, installation, programming, start-up, and training sold directly to an end user customer or through a tier of contractors. It does not include recurring revenue from service and monitoring, as integrators were asked to report that amount separately in order to be ranked on the SDM 100, a report based on RMR in the security industry. Last year's Top Systems Integrators Report ranked 114 systems integrators; this year's report ranks 124 companies. A comparison between the top 100 companies ranked this year and the top 100 ranked in 2012 shows a 9 percent decrease in systems integration revenue. *Source: SDM Top Systems Integrators Report, July 2013*

Top Systems Integrators: 8-Year Performance

North American systems integration revenue (as reported to or estimated by SDM) reached \$6.29 billion in 2012, based on reporting from 124 Top Systems Integrators. However, for comparison purposes, SDM measures the top 100 companies (\$6.24 billion in 2012) against the top 100 companies from the previous year (\$6.88 billion in 2011), which registers a 9 percent decrease. One important change is the exclusion of ADT from the Top Systems Integrators Report.



*2007 figure reflects a correction to reported revenues for Johnson Controls and ADT, following incorrect reporting in 2006. While it appears that there was a 17 percent increase in total revenue between 2006 and 2007, it was actually 4 percent growth.

†In the 2010 report, several notable companies did not participate, including SAIC, Red Hawk Security, North American Video, and National Security Systems Inc., which skewed the results. Among systems integrators for which a year-to-year comparison could be made, there was actually only a 4.4 percent decrease in performance between 2009 and 2010.

**Two major factors contributed to the decrease in systems integration revenue; ADT was not ranked, and Siemens Industry Inc. systems integration revenue was adjusted downward by an SDM estimate.

Source: SDM Top Systems Integrators Report, July 2013

2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
68		Minuteman Security Technologies, Inc. Andover, Mass.	\$7,516,249	160	\$2,100,000	\$500	transport, edu, health	29	1
69	78	Enterprise Security Inc. Anaheim, Calif.	\$7,406,635	na	\$1,000,000	\$5,000	na	40	3
70	64	Firstline Security Systems Inc. Anaheim, Calif.	\$7,350,000	41	\$840,000	\$2,300	utility, corp, finance	36	2
71	67	Qualified Systems Contracting Inc. Tampa, Fla.	\$7,350,000	125	\$975,000	\$1,500	health, govt, utility	42	3
72	47	Midstate Security Company Grandville, Mich.	\$7,318,311	1,103	\$1,905,661	\$450	retail, airport, industrial	74	2
73	108	Life Safety Engineered Systems Inc. Buffalo, N.Y.	\$7,168,031	97	\$388,000	\$1,500	retail, health, edu	37	4
74	66	PASS Security Fairview Heights, Ill.	\$7,122,221	300	\$900,000	\$5,000	edu, utility, health	na	1
75	75	APL Access & Security Inc. Gilbert, Ariz.	\$6,665,629	75	\$500,000	\$10,000	corp, govt, health	39	2
76	87	Sentry Communications & Security Hicksville, N.Y.	\$6,150,000	10	\$750,000	\$500	corp, retail, transport	na	3
77	71	Custom Alarm Rochester, Minn.	\$6,101,945	865	\$158,575	\$195	health, retail, edu	62	1
78	63	Ackerman Security Systems Atlanta, Ga.	\$6,057,740	2,129	na	\$199	retail, utility, govt	273	2
79	76	Advanced Control Concepts Inc. Pensacola, Fla.	\$5,983,793	425	\$369,081	\$1,431	govt, edu, utility	32	1
80	68	CGL Electronic Security Inc. Norwood, Mass.	\$5,948,037	250	\$320,000	\$15,000	edu, defense, corp	31	1
81	79	Scarsdale Security Systems Inc. Scarsdale, N.Y.	\$5,925,000	na	\$125,000	\$250	retail, airport, govt	83	2
82	91	Per Mar Security Services Davenport, Iowa	\$5,266,755	7,372	\$451,540	\$99	industrial, health, corp	296	13
83	72	Will Electronics St. Louis, Mo.	\$5,264,464	150	\$250,000	\$5,000	na	26	1
84	100	Sonitrol New England Rocky Hill, Conn.	\$5,155,000	2,055	\$540,483	\$99	edu, corp, industrial	105	5
85		Access Control Consultants Greensboro, N.C.	\$5,066,148	325	\$655,000	\$1,500	edu, corp, law	33	4
86	77	Telenet VoIP Inc. El Segundo, Calif.	\$5,041,143	44	\$80,000	\$2,500	na	51	1
87	88	AVS Technology Totowa, N.J.	\$4,967,952	200	\$500,000	\$5,000	airport, corp, govt	20	3
88	92	Atlantic Coast Alarm Inc. Mays Landing, N.J.	\$4,875,050	200	na	na	na	82	3
89	89	Sonitrol of Lexington / Bates Security Lexington, Ky.	\$4,788,069	319	\$390,855	\$95	edu, govt, corp	53	1
90	82	D/A Central Inc. Oak Park, Mich.	\$4,782,476	648	\$250,000	\$1,000	finance, health, mfg	37	3

No. 69 – Continued efforts in the government arena enabled the company to open an office to capitalize on government work. ■ No. 71 – Enhanced management tools/upgraded software management. Rolled out new accounting software, new service dispatching software, and new project management software. ■ No. 73 – Became Vendor of the Year for OfficeMax. ■ No. 75 – Developing an infrastructure for video monitoring stations for remote video monitoring and remote access control management services. ■ No. 77 – Successfully converted central station software to a new platform. ■ No. 78 – In addition to double-digit revenue growth, Ackerman was selected by the Atlanta Business Chronicle as one of the Best Places to Work. ■ No. 79 – Renegotiation and continuance of the company's GSA schedule for another five years. ■ No. 80 – Maintained reasonable gross margins, even with a drop in overall annual revenue. ■ No. 81 – Process improvements and restructuring, rebranding. ■ No. 82 – Record internal RMR growth year due to an increase in the services provided in the last couple of years. Also saw great increases in financial success, which was due mostly to the growth in integrated projects and larger projects. ■ No. 84 – 2012 saw the complete integration of IP-based alarm communication within the company. Technicians and sales teams received extensive training and in the central station, IP was embraced not only from a hardware and equipment perspective, but also as far as policies and procedures, and disaster recovery. ■ No. 85 – Received reward for Educational Partner of the Year, from Axis Communications. ■ No. 86 – Acquired two high-profile projects, MLK Hospital and Rose Bowl Stadium. ■ No. 89 – Moved to a brand new corporate headquarters, a three-story 14,000 sq. ft. building. This was a very involved project yet the company was able to continue its strong sales growth and maintain a high level of customer service. ■

e = SDM estimate. na = not available. Abbreviations to markets: airport = airports; corp = corporate office space; correctional = correctional; edu = education/campus; entertainment = entertainment/sports venues; finance = financial/banking; gaming = casinos/gaming; govt = government; health = healthcare; hospitality = hotels/hospitality; industrial = industrial; law = law enforcement; retail = retail/restaurants; transport = transportation/distribution; utility = utilities/critical infrastructure.

2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
91	85	ESIGroup Houston, Texas	\$4,776,213	212	na	na	corp, industrial, hospitality	18	1
92	93	SecurAlarm Systems Inc. Grand Rapids, Mich.	\$4,697,542	330	\$550,000	\$99	corp, correctional, retail	40	1
93		Electronic Security Concepts LLC Scottsdale, Ariz.	\$4,633,782	460	\$460,000	\$1,600	govt, health, law	23	2
94	98	Redrock Security & Cabling Inc. Irvine, Calif.	\$4,573,089	188	\$1,566,784	\$5,057	correctional, utility, entertainment	33	2
95	83	Electronic Security Systems Warren, Mich.	\$4,455,000	25	\$600,000	\$5,000	edu, health, corp	26	2
96	80	T&R Alarm Systems Inc. Clifton, N.J.	\$4,437,741	100	\$250,000	\$500	edu, health, corp	29	3
97	60	EO Integrated Systems Inc. Washington, Mich.	\$4,116,105	25	\$980,000	\$40,000	correctional, utility, govt	15	3

No. 92 – Won 2012 Small Business of the Year Award from the Grand Rapids Chamber of Commerce, as well as won for the second year in a row 101 Best and Brightest Companies to Work for (West Michigan and national). Also received an Award of Excellence for Low Voltage Systems from Associated Builders & Contractors for a significant project completed during the year. ■ No. 93 – Finished the year with 30 percent growth over 2011. Awards from Honeywell CSS included first place in sales for 2012 and Technical Application Achievement Award. Awards from Honeywell HIS included Integrated Systems Southwest Dealer of the Year. ■ No. 94 – Project at Hyundai Motor Finance Company: 800 CAT6A 10 Gig locations, 600 CAT6 locations, server room build out, sound masking system, access system with badging and video surveillance system. ■ No. 95 – Installed card access, video, sliding doors, high-security key system, metal detector in a high-end watch manufacturing facility. ■ No. 96 – Installed an integrated access, fire, video, burglar alarm in a factory that processes gold and silver into electrical ribbon for circuit boards. ■ No. 97 – Completed the North Carolina Central Prison project that included detention door control, card access, IP video and IP intercom systems. ■

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Top 3 Market Sectors: Corporate, Education, Healthcare

Top Systems Integrators were asked to rank the sectors that provided the most significant portion of their 2012 revenue.

2012

1. Corporate
2. Education/Campus
3. Healthcare
4. Retail/Restaurant
5. Government
6. Utilities/Critical Infrastructure
7. Financial/Banking
8. Industrial
9. Correctional
10. Law Enforcement

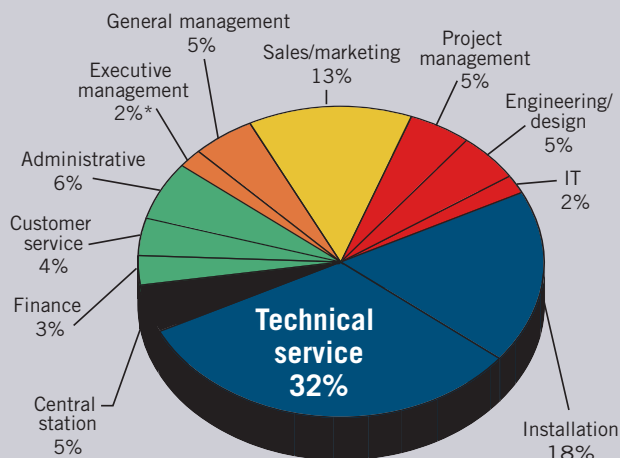
2011

1. Corporate
2. Industrial
3. Education/Campus
4. Healthcare
5. Government
6. Retail/Restaurant
7. Utilities
8. Financial/Banking
9. Transportation
10. Law Enforcement

These top 10 market sectors provided the most significant portion of revenues to systems integrators in 2012. For the past several years, corporate/property management, education, and healthcare have steadfastly appeared among the top market sectors.

Source: SDM Top Systems Integrators Report, July 2013

Composition of an Integrator Staff



This chart, which you can use to compare job titles in your own company with industry averages, shows the average percentage distribution of job titles among Top Systems Integrator companies. Fifty percent of positions are in installation and technical service.

*average percentage distribution of staff titles among systems integrators; based on 113 responses

Source: SDM Top Systems Integrators Report, July 2013

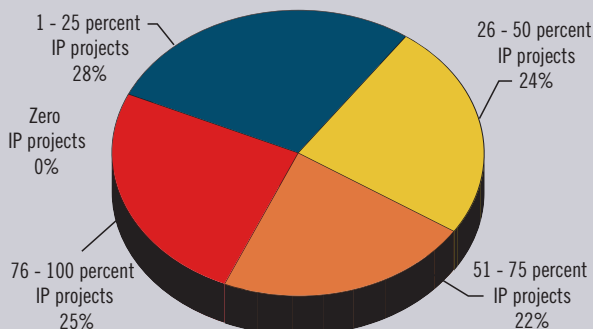
2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
98		Kimberlite Corp. Fresno, Calif.	\$4,099,845	459	\$100,000	\$1,500	law, edu, govt	105	8
99	96	EPS Security Grand Rapids, Mich.	\$4,001,264	645	\$200,000	\$99	na	183	6
100	104	Sonitrol of Sacramento & Sonitrol Orange County Roseville, Calif.	\$3,764,565	1,434	\$115,440	\$195	na	68	2
101		American Security Systems Inc. Long Island City, N.Y.	\$3,750,000	150	\$350,000	\$299	hospitality, new constr., edu	75	2
102		Engineered Security Systems Towaco, N.J.	\$3,678,355	na	\$600,000	\$1,200	hospitality, corp, health	47	3
103	102	Matson Alarm Co. Inc. Fresno, Calif.	\$3,124,916	899	\$179,868	\$500	corp, industrial, retail	66	4
104	81	Simpson Security Systems Inc. Alexandria, La.	\$3,036,637	180	\$1,450,000	\$850	correctional, gaming, hospitality	45	1
105		Sonitrol of Buffalo, Rochester, Toronto Buffalo, N.Y.	\$2,887,453	179	\$160,000	\$2,000	corp, industrial, health	86	3
106	97	Custom Security Systems Lacey, Wash.	\$2,771,418	485	\$80,000	\$300	govt, edu, utility	102	3

No. 98 – Central station aided in the apprehension of 1,035 criminals. ■ No. 101 – Continued to build up the company's fire division, both installations and "parts and smarts" for electricians. ■ No. 103 – A 12.7 percent increase in total revenue over the prior year. ■ No. 104 – Completed Federal Correctional Institution in Aliceville, Ala. ■ No. 106 – No layoffs; maintaining economic position; minimal RMR net attrition. ■

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Integrators Climb the Ranks of IP Technology Usage

Top Systems Integrators were asked, "What percentage of projects sold in 2012 incorporated IP-based technology?"



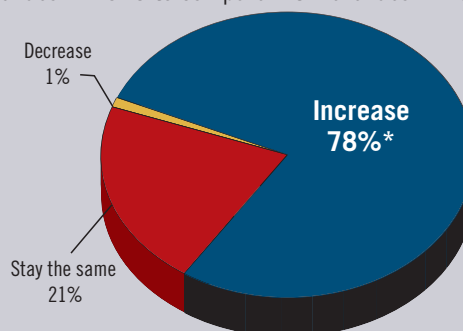
You can benchmark your company's expertise in IP technology against the group of Top Systems Integrators, using the information shown above. Systems integrators demonstrate a wide range of experience in this area; however, over the past few years, more integrators are climbing into the ranks of having more than 50 percent of their projects use IP-based technology.

*percentage of Top Systems Integrators indicating each category; based on 115 responses Total does not equal 100% due to rounding

Source: SDM Top Systems Integrators Report, July 2013

A Bit of Optimism, a Bit of Caution

Top Systems Integrators were asked, "How do you expect revenues in 2013 to compare with revenues in 2012?"



Just under eight in 10 Top Systems Integrators (78 percent) expect their 2013 revenues to exceed 2012's. This marks a slight level of caution, when one year ago, 84 percent of integrators said they expected an increase. This year, more integrators (21 percent compared with 14 percent one year ago) were likely to expect to maintain the same level of revenue, rather than expect an increase.

*percentage of Top Systems Integrators indicating each answer; based on 122 responses

Source: SDM Top Systems Integrators Report, July 2013

2013 Rank	2012 Rank	Company & Headquarters Location	North American Systems Integration Revenue 2012	Number of New Projects 2012	Value of Largest New Project	Value of Smallest New Project	Top 3 Markets Contributing to Revenue	Full-time Employees	Business Locations
107	94	SCI Inc. Albuquerque, N.M.	\$2,646,054	212	\$275,000	\$5,000	govt, utility, corp	15	1
108	110	Habitec Security Toledo, Ohio	\$2,600,000	650	\$350,000	\$500	edu, corp, govt	90	3
109	105	Key-Rite Security Denver, Colo.	\$2,543,218	96	\$125,000	\$1,500	corp, govt, industrial	16	1
110		Yarnell Security Systems Lancaster, Pa.	\$2,400,000	120	\$300,000	\$99	corp, industrial, retail	41	1
111	99	Sonitrol Pacific Portland, Ore.	\$2,400,000	338	\$80,000	\$995	edu, corp, retail	85	5
112	103	Triad Protective Service Union, N.J.	\$2,192,000	205	\$165,000	\$1,000	corp, edu, health	20	1
113		MSA Systems Integration Eatontown, N.J.	\$2,154,000	na	\$1,100,000	\$2,500	utility, industrial, corp	71	8
114	101	Sentry Security Wheeling, Ill.	\$2,151,755	521	\$114,000	\$499	health, corp, industrial	21	1
115		Strategic Security Solutions Raleigh, N.C.	\$1,974,852	181	\$433,028	\$450	na	9	1
116		Briscoe Protective Systems Inc. Centereach, N.Y.	\$1,879,745	80	\$43,000	\$6,000	edu, health, corp	35	1
117	113	World Wide Security & GC Alarm Inc. Garden City, N.Y.	\$1,800,000	300	\$100,000	\$350,000	retail, education, corp	55	1
118		Sonitrol Security Services Inc. Charlotte, N.C.	\$1,657,681	60	\$75,000	\$1,000	law, hospitality, entertainment	53	2
119	114	EMC Security Suwanee, Ga.	\$1,576,595	775	\$240,000	\$300	corp, edu, industrial	100	1
120		Washington Alarm Inc. Seattle, Wash.	\$1,548,968	1,092	\$73,000	\$300	edu, corp, health	46	1
121	107	First Alarm Aptos, Calif.	\$1,350,000	1,563	\$186,300	\$100	industrial, corp, govt	137	5
122		Sonitrol SW Ohio Mason, Ohio	\$1,300,000	75,000	\$125,000	\$600	corp, edu, govt	48	2
123	112	Protex Central Inc. Hastings, Neb.	\$1,100,000	360	\$275,000	\$500	industrial, health, edu	58	4
124		All Systems Designed Solutions Inc. Kansas City, Kansas	\$1,020,619	77	\$461,046	\$5,956	health, govt, edu	43	2

No. 108 – Adding more recurring service solutions, including verified video monitoring, managed access control and simplified home automation. Positioned the company as a services business and avoid sales without RMR. ■ No. 113 – Deployed new integration offices in Houston, Charlotte, Ohio and California. ■ No. 115 – Implementation of the restructure resulted in the company significantly increasing RMR, landing three profile accounts and secured the highest profile access control / CCTV project in the company's region. ■ No. 116 – Installed and programmed a fire alarm system for a 40-story hotel in Manhattan. This is the largest building in which Briscoe Protective Systems has installed a fire alarm system, to date. ■ No. 117 – Integrated acquired accounts and had organic growth. ■ No. 119 – Continues to expand monitoring of school systems with seven total school systems now being monitored. Connected services business growing with continued expansion of the "SecurePath" marketing message that includes three connected paths for security monitoring. ■ No. 120 – Investment in a new building, infrastructure and personnel. ■ No. 121 – Significant investment in company's IT plant; switching to a virtual server arrangement. ■ No. 123 – Implementation of Salesforce CRM to better serve customers and improve communication and efficiencies internally.

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More from the Report

To gain additional information beyond that published in this issue and online, the complete SDM Top Systems Integrators Report and Database is available in Excel format. Included are contact names, mailing addresses, telephone numbers, website URLs, targeted vertical markets, branch office locations, and much more.

SDM's Top Systems Integrators Report and Database contains the information needed to target products and services to the systems integration market.

The cost of the report is \$595. It may be ordered by contacting Heidi Fusaro at 630-518-5470 or by emailing fusaroh@bnpmedia.com.

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