We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

# Forecast :
IT Market in Israel 2012

Dr. Jimmy Schwarzkopf
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IT Knowledge Integrators

- Dr. Schwarzkopf has worked during the last 35 years in all areas of Computer Information Services.
  - IT Analyst as META Group Israeli Research Manager and was named a META Group Research Fellow.
  - As an academic researcher in Entrepreneurship Sciences; has published and presented in the Academy of Management and Babson Conferences and Editorial Board Member of the academic journal "International Journal of Opportunity, Growth and Value Creation".
  - As a consultant in Arthur Andersen Consulting (USA), Booz Allen (USA) and Kesselman & Kesselman.
  - As a systems professional in SCS Computers and the R&D Unit of the Israel Defense Forces.
  - As a sales and marketing professional in Digital Equipment Corporation.
  - Teaching in the MIS department at Ben Gurion University, the TelAviv Yafo Academic College and the Computer School of the IDF.
  - Entrepreneur founding three companies in the IT arena: STKI, store and forward mail and office information systems.

- Dr. Schwarzkopf served on the Board of Directors of Ashot Ashkelon Industries, served as President of the Gymnazia Herzelia Association, Co-founder of the Mashov Political Movement and was a member of the Central Committee of the Labor Party. Major (Rav-Seren) in the reserves, Israel Defense Forces (where he served in an elite unit and later in the R&D unit). Registered Engineer (IS22881), member of MENSA Israel.

- Dr. Schwarzkopf received BSE and MSE degrees (Systems Engineering) from the University of Central Florida. Received a MSIA (Management Information Systems) and is an ABD (in PhD Program) in Systems Science (received (twice) the William Larimer Mellon Scholarship/Award) from Carnegie Mellon University. His doctorate (Management/ Entrepreneurship) he received from Case Western Reserve University.

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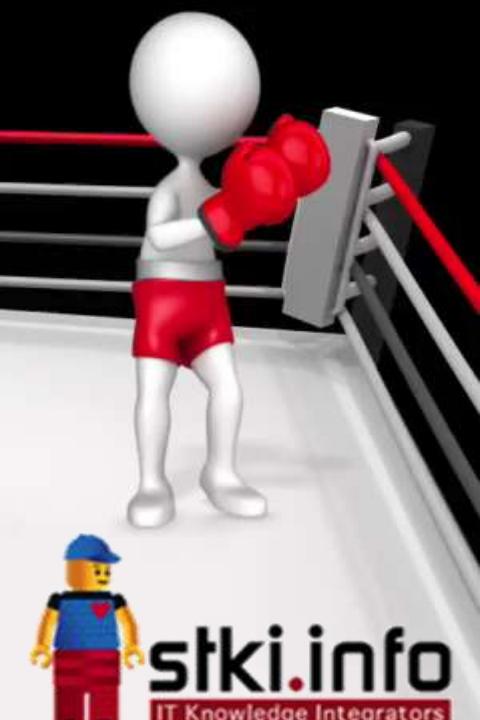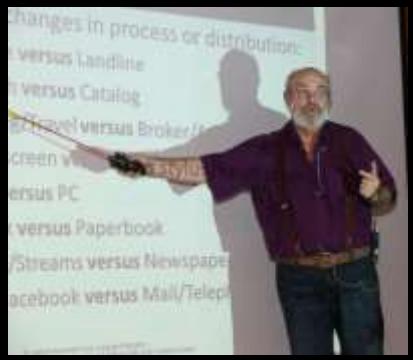
Unlike some research and advisory firms

STKI

does no consulting work ,
allowing our research to be **totally unbiased, with no hidden agendas to promote** any particular technology or vendor.
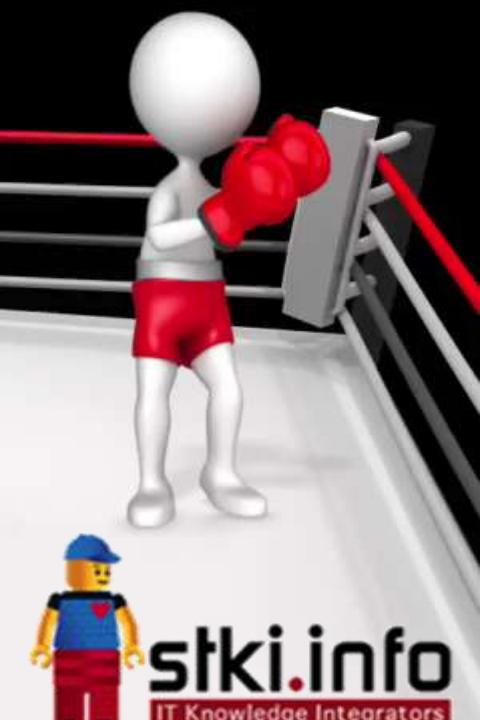
Founded in 1992, STKI is the leading market research and strategic analyst firm in Israel, covering the IT infrastructures, IT applications and IT services industry .

Over 20 years of experience in the IT analyst sector and thousands of annual face-to-face interviews with key industry participants have enabled us to establish solid, long-standing relationships with our customers.

Our customers include major IT organizations (government, financial institutions, telecoms, manufacturing, medical, education, etc.) and IT suppliers/vendors (infrastructure and software suppliers, consulting and professional services firms).

STKI works closely with vendor senior management (strategy, business development, and marketing). Where end users are concerned, STKI meets with IT managers as well as with all levels of IT decision making, thereby attaining complete information of processes.

STKI's mission is to advise and analyze users of information technology as well as their suppliers while conducting original research and providing advisory services regarding all parts of the information system puzzle. Israel's foremost IT companies have come to rely on STKI's market-proven experience and expertise.

Our services include:

- Face-to-face meetings
- STKI Analyst House Calls (for both users and vendors)
- CIO STKI "Help Desk"
- Inquiries
- Surveys
- Strategic Marketing & Positioning
- Round Tables for users
- Vendor Discovery Series (Newsletters and workshops)
- In-house Workshops
- CIO Annual Bootcamp
- CTO Annual Bootcamp
- Brainstorming Workshops
- STKI Annual Summit

who are we?

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3

What STKI analysts did for this report:
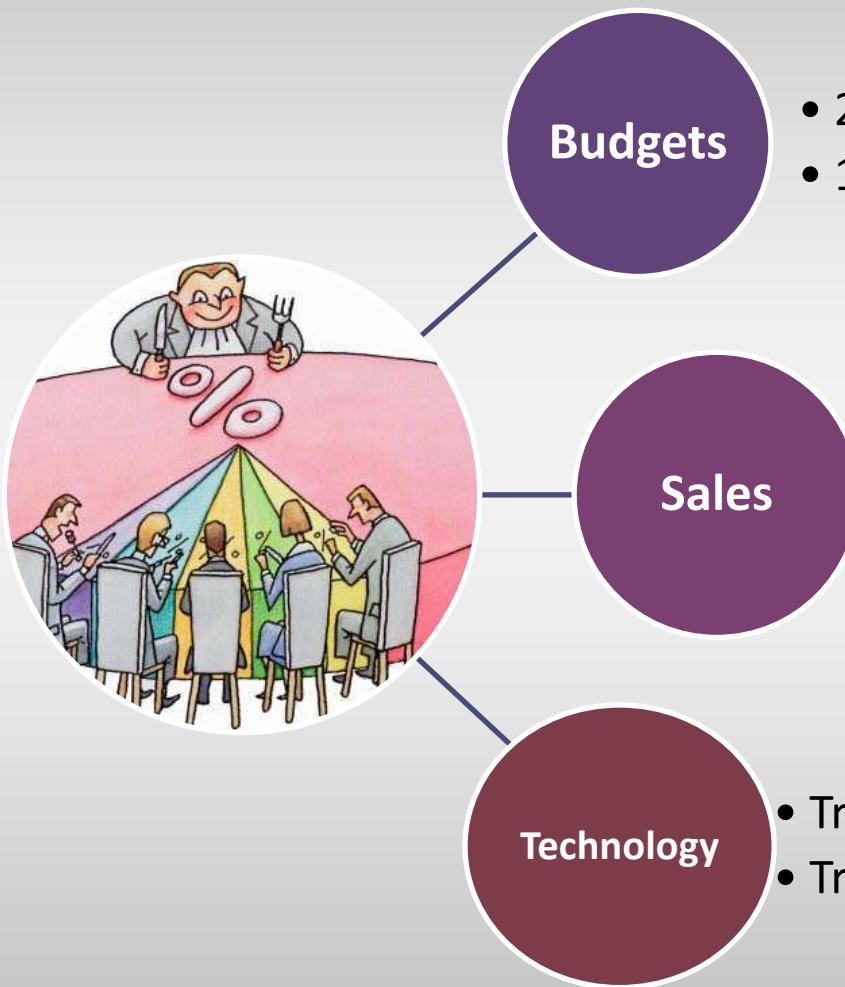
Budgets
- 210 CIOs
- 16 Industries

Sales
- 310 Vendors
- 106 categories
- X000s products/services

Technology
- Trends in Israel
- Trends in World

STKI's Methodology

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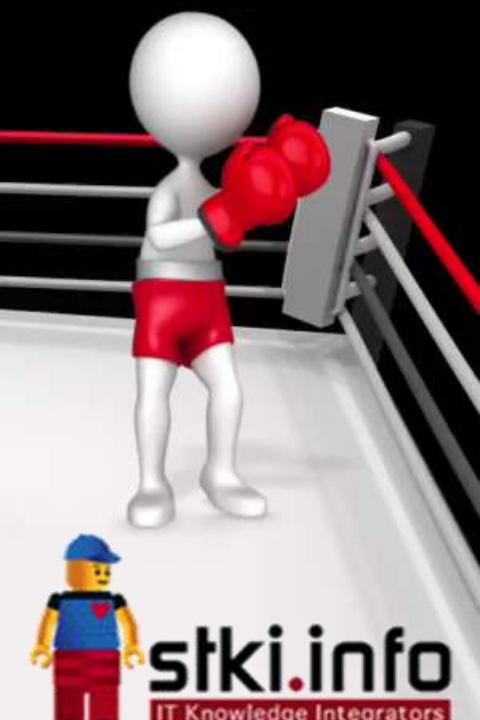
EQUILIBRIUM MODEL.

The sum of all *IT expenditures* (from users) has to be equal to all *IT sales* (from vendors).

Most research firms are either a

"demand-based"

(market information based on data from users of IT)

or

"supply-based"

(market information based on data from IT vendors).

STKI is one of the only research firms using an equilibrium model and the only one in Israel.

STKI's Methodology

Users of IT

Vendors of IT

Equilibrium model

categories

25 years of IT user behavior and data

25 years of IT vendor behavior and data

Hardware, Software & Value Added Services Categories

ISRAELI MARKET

FACTS

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What our study looks at:

- Real revenues of software licenses and maintenance.

- Real revenues of hardware sales.

- Differentiation between new projects and continuing projects. New projects count more.

- We do not include any work/ products for OEMs and military non-IT projects.

- We distinguish between work done by the vendor's employees and work outsourced to another vendor. The revenue is transferred to the vendor actually doing the work.

- Distinguish revenues from projects done in fixed price, cost plus (SLA defined) and staff augmentation (non SLA) projects.

- Differentiate value between work done by high level internal professionals in a project and staff augmentation employees in the clients IT department.

- Take into consideration IT department's view/mindshare of vendor's value in projects/products

We rank VENDORS by
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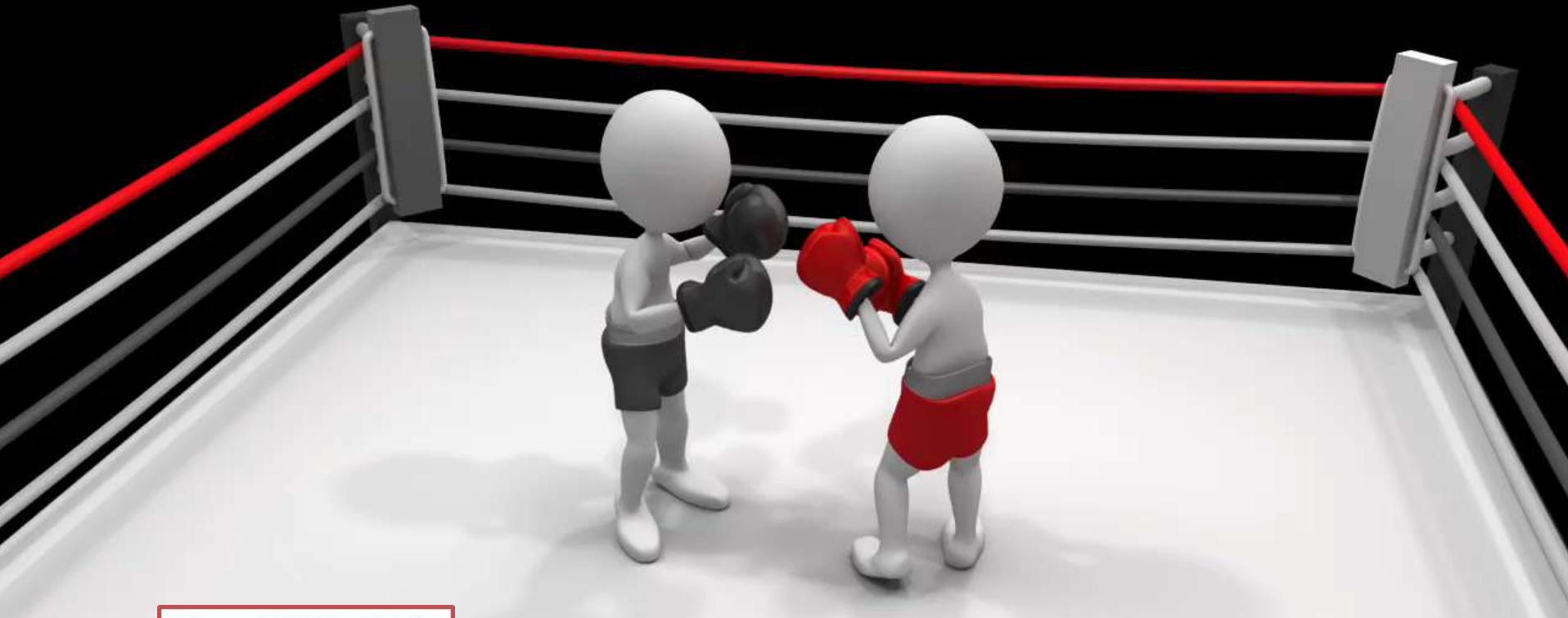
All amounts in M $ USD

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We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Israel: Economic Data
2012 Israel IT Market

Economic Figures

Criteria	2009	2010	2010 Q4	2011 Q1	2011 Q2	2011 Q3
GDP (constant prices, 2005, in $B)*	189.9	199.0	50.9	51.5	51.9	52.4
Real GDP growth rate (% change)	**0.8%**	**4.8%**	**7.2%**	**4.7%**	**3.5%**	**3.4%**
GDP per capita growth rate (%, 2005 prices)	-0.9%	2.9%	8.6%	5.2%	2.6%	5.3%
Exports (goods & services), $B* *(As % of GDP)*	75.1 *39.5%*	85.3 *42.9%*	22.1 *43.4%*	22.5 *43.7%*	22.6 *43.5%*	21.5 *41.0%*
Unemployment rate	7.6%	6.6%	6.5%	6.0%	5.5%	5.6%

* Using a public exchange rate of 1USD=3.7NIS (2010 average)
** Estimated

Additional Sources: IMF

Real GDP Growth

Estonia, Ireland, Iceland, Greece, Italy, Hungary, Finland, Denmark, Japan, United Kingdom, Slovenia, Spain, France, Portugal, Norway, Sweden, Netherlands, OECD, Germany, United States, Austria, Belgium, Czech Republic, Mexico, Russian Federation, Canada, Luxembourg, New Zealand, Switzerland, Turkey, South Africa, Slovak Republic, Australia, Chile, Korea, Israel, Poland, Brazil, Indonesia, India, China

-0.10%

3.19%

Additional Sources: OECD

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GDP per Capita

U.S $, Current prices, PPP, 2010
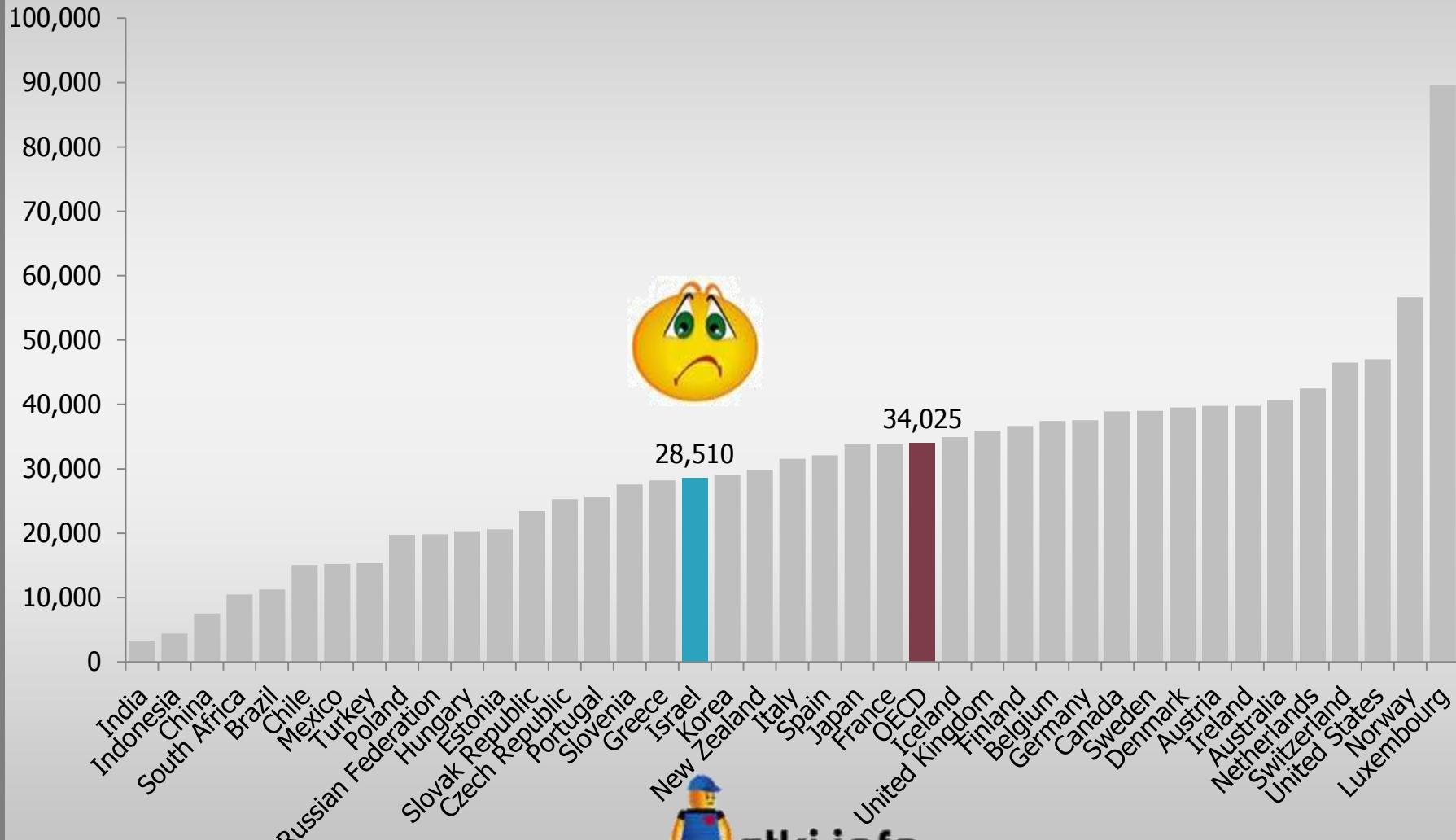
Additional Sources: OECD

Unemployment Rate

3-year average 2008-2010, or latest available period

Israel's unemployment rate is in an ongoing downtrend, reaching an **historic low level** of 5.5% in Q2 2011.

7.1%

7.7%

Norway, Korea, Netherlands, Switzerland, Austria, Japan, Luxembourg, Mexico, Australia, Denmark, New Zealand, Slovenia, Iceland, Czech Republic, United Kingdom, Israel, Russian Federation, Canada, Germany, Brazil, Sweden, Italy, Finland, OECD, Belgium, Indonesia, United States, Poland, Chile, France, Portugal, Hungary, Greece, Ireland, Turkey, Slovak Republic, Estonia, Spain, South Africa

Additional Sources: OECD

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Long-term unemployment

Persons unemployed for 12 months or more as a percentage of total unemployed
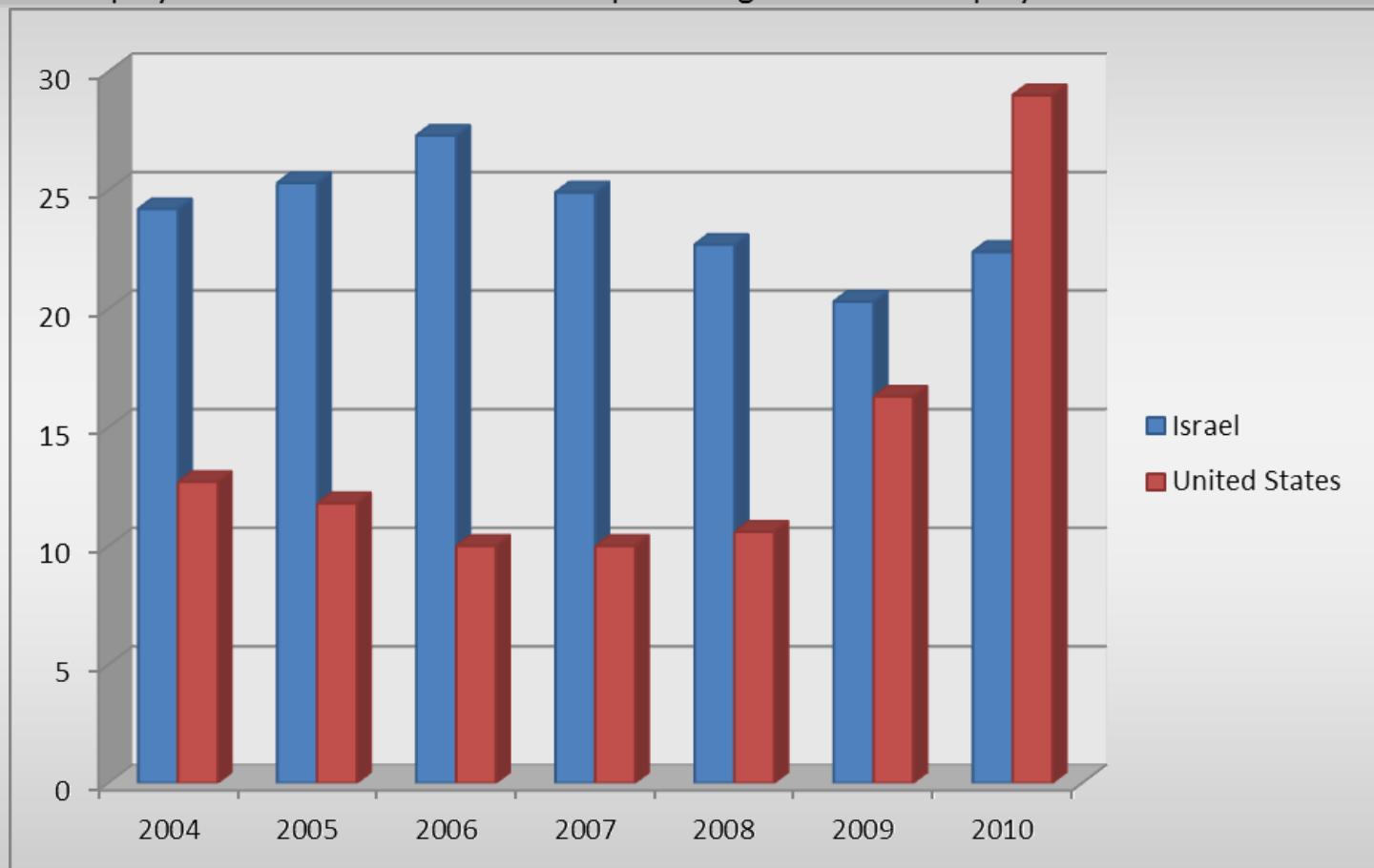
Unemployment and Participation

As % of total labor force

Since the 2nd quarter of 2009 unemployment is relatively **decreasing**, hand in hand with a relative **increase** in participation rate since the 1st quarter of 2010.

Unemployment Rate

Participation in the Labor Force
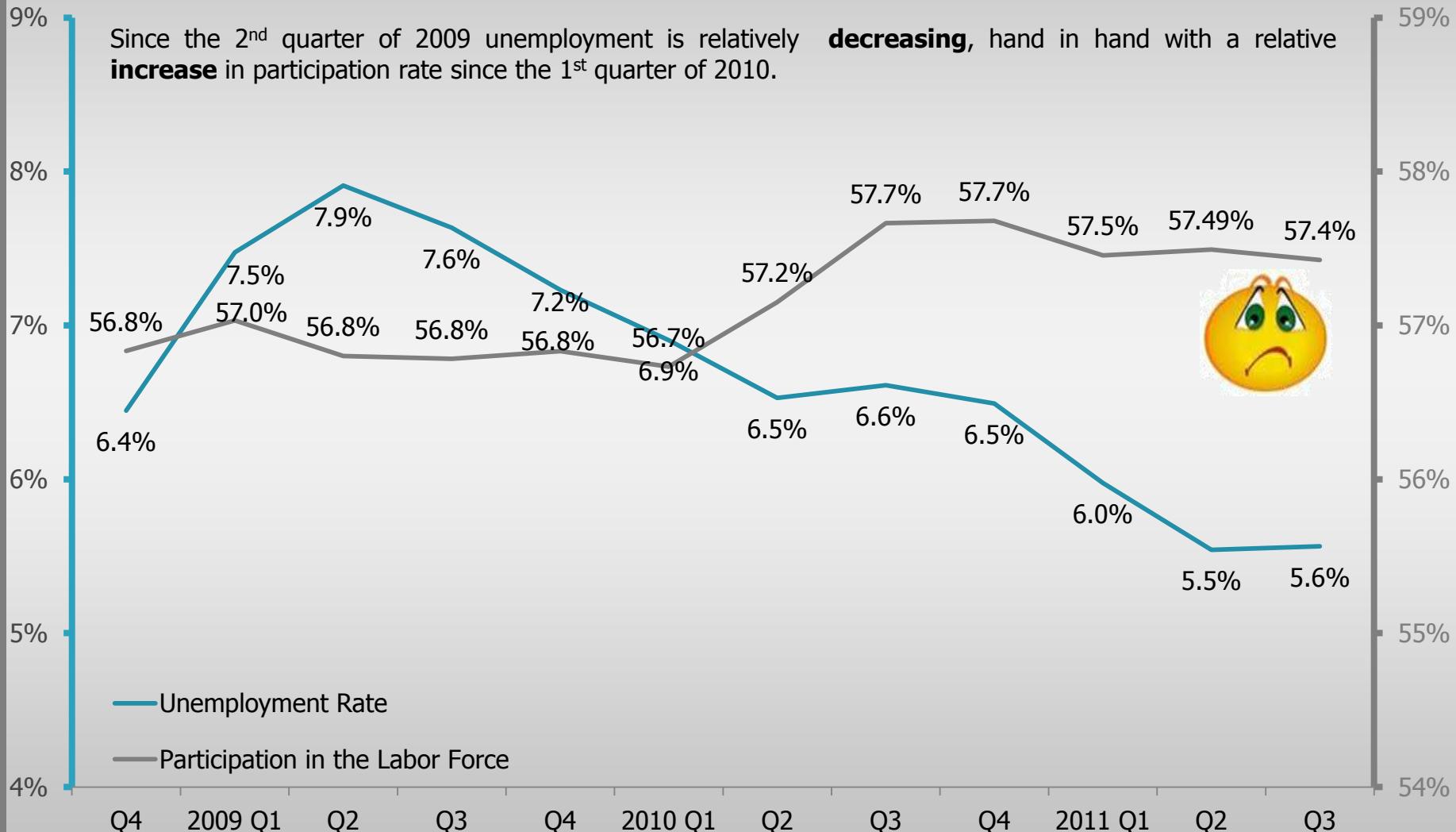
DOING BUSINESS

MEASURING BUSINESS REGULATIONS

DATA | RANKINGS | REPORTS | METHODOLOGY | RESEARCH | BUSINESS REFORMS | LAW LIBRARY

PRESS

Ease of Doing Business in
Israel

2012 Rank	2011 Rank	2010 Rank	2009 Rank	Country/Region
34	**29**	**29**	**30**	Israel

Israel on IMD Rankings

IMD World Competitiveness Yearbook 2011

The Institute for Management Development ranked Israel **17th** out of 59 countries for 2011 (Israel was also ranked 17th in 2010)

Additional Sources: IMD World Competitiveness Yearbook 2011

Israel on IMD Rankings

IMD World Competitiveness Yearbook 2011

Information technology skills

I	ISRAEL	9.22
2	ICELAND	9.07
3	DENMARK	9.05
4	SWEDEN	8.93
5	INDIA	8.77
6	FINLAND	8.70
7	NORWAY	8.68
8	USA	8.63
9	CANADA	8.57
10	TAIWAN	8.47

Innovative capacity

I	USA	8.24
2	ISRAEL	8.00
3	SWITZERLAND	7.88
4	GERMANY	7.60
5	SWEDEN	7.52
6	TAIWAN	7.30
7	AUSTRIA	7.24
8	DENMARK	7.21
9	KOREA	7.04
10	JAPAN	7.00

Additional Sources: IMD World Competitiveness Yearbook 2011
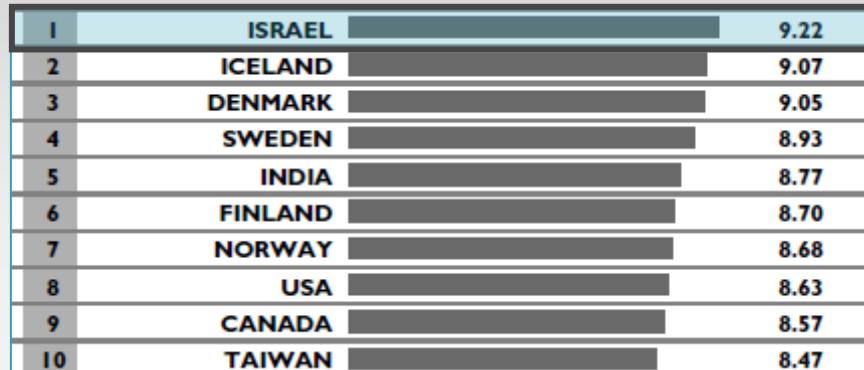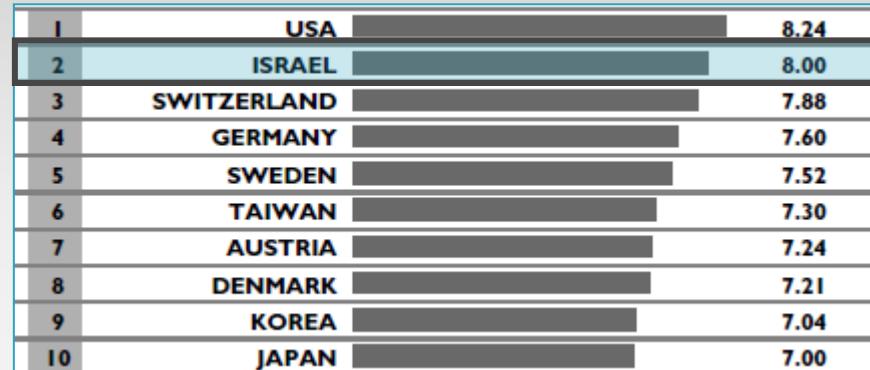
Flexible and adaptability
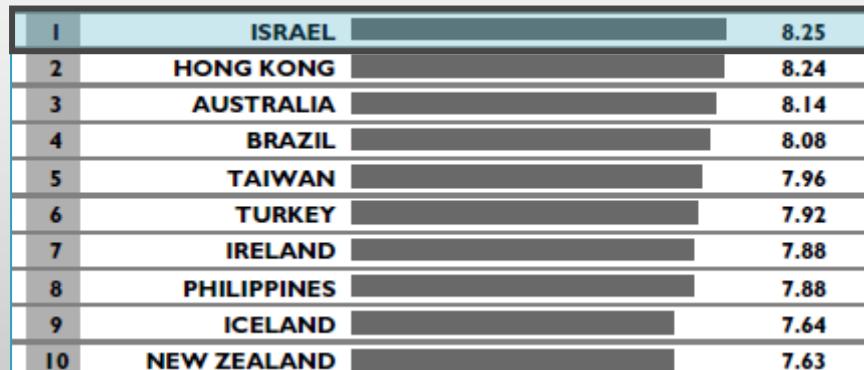
I	ISRAEL	8.25
2	HONG KONG	8.24
3	AUSTRALIA	8.14
4	BRAZIL	8.08
5	TAIWAN	7.96
6	TURKEY	7.92
7	IRELAND	7.88
8	PHILIPPINES	7.88
9	ICELAND	7.64
10	NEW ZEALAND	7.63

Entrepreneurship

I	ISRAEL	7.50
2	MALAYSIA	7.06
3	COLOMBIA	7.00
4	TAIWAN	6.98
5	HONG KONG	6.98
6	KOREA	6.87
7	POLAND	6.82
8	BRAZIL	6.70
9	IRELAND	6.69
10	USA	6.64

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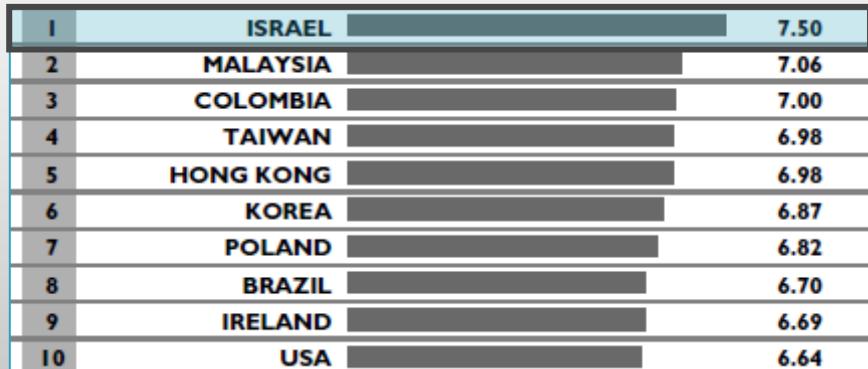
Israel on WEF Rankings

World Economic Forum Global Competitiveness Index 2011-2012

The World Economic Forum ranked Israel **22nd**

out of 142 countries for 2011-2012

Additional Sources: World Economic Forum Global Competitiveness Index 2011-2012

| Country/Economy	GCI 2011-2012 Rank	GCI 2011-2012 Score
Switzerland	1	5.74
Singapore	2	5.63
Sweden	3	5.61
Finland	4	5.47
United States	5	5.43
Germany	6	5.41
Netherlands	7	5.41
Denmark	8	5.40
Japan	9	5.40
United Kingdom	10	5.39
Hong Kong SAR	11	5.36
Canada	12	5.33
Taiwan, China	13	5.26
Qatar	14	5.24
Belgium	15	5.20
Norway	16	5.18
Saudi Arabia	17	5.17
France	18	5.14
Austria	19	5.14
Australia	20	5.11
Malaysia	21	5.08
Israel	22	5.07
Luxembourg	23	5.03
Korea, Rep.	24	5.02
New Zealand	25	4.93
China	26	4.90
United Arab Emirates	27	4.89

Israel on WEF Rankings

World Economic Forum Global Competitiveness Index 2011-2012

### Government procurement of advanced technology products

RANK	COUNTRY/ECONOMY	VALUE
1	Qatar	6.2
2	Singapore	5.4
3	Saudi Arabia	4.9
4	Malaysia	4.9
5	United Arab Emirates	4.8
6	Israel	4.8
7	Luxembourg	4.7
8	Finland	4.7
9	United States	4.7
10	Sweden	4.5

MEAN: 3.6
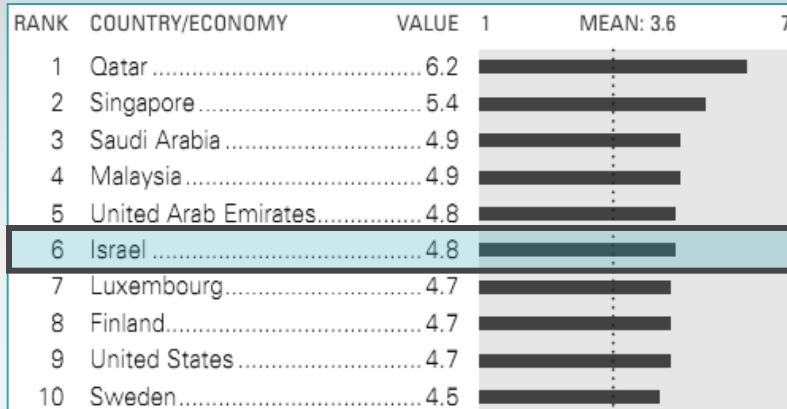
Capacity for innovation

RANK	COUNTRY/ECONOMY	VALUE
1	Japan	5.8
2	Switzerland	5.8
3	Germany	5.7
4	Sweden	5.7
5	Finland	5.6
6	Israel	5.3
7	United States	5.2
8	France	5.1
9	Denmark	5.1
10	Netherlands	5.0

MEAN: 3.2

Firm-level technology absorption

RANK	COUNTRY/ECONOMY	VALUE
1	Sweden	6.5
2	Iceland	6.3
3	Japan	6.3
4	Switzerland	6.2
5	Norway	6.1
6	Israel	6.1
7	Qatar	6.0
8	Korea, Rep.	6.0
9	Denmark	6.0
10	Singapore	6.0

MEAN: 4.8
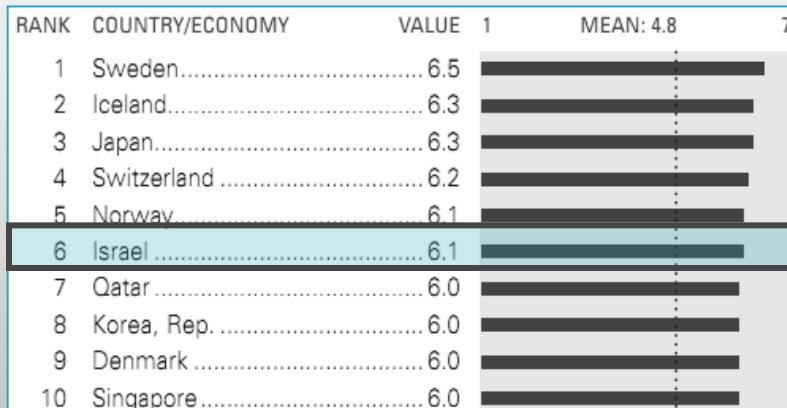
University-industry collaboration in R&D

RANK	COUNTRY/ECONOMY	VALUE
1	Switzerland	5.8
2	United Kingdom	5.8
3	United States	5.7
4	Finland	5.6
5	Sweden	5.5
6	Singapore	5.5
7	Israel	5.4
8	Netherlands	5.3
9	Belgium	5.3
10	Qatar	5.3

MEAN: 3.7

Additional Sources: World Economic Forum Global Competitiveness Index 2011-2012

# High Technology Industry Trends

מגמות תעשיות טכנולוגיה עלית
High - Technology Industries trends
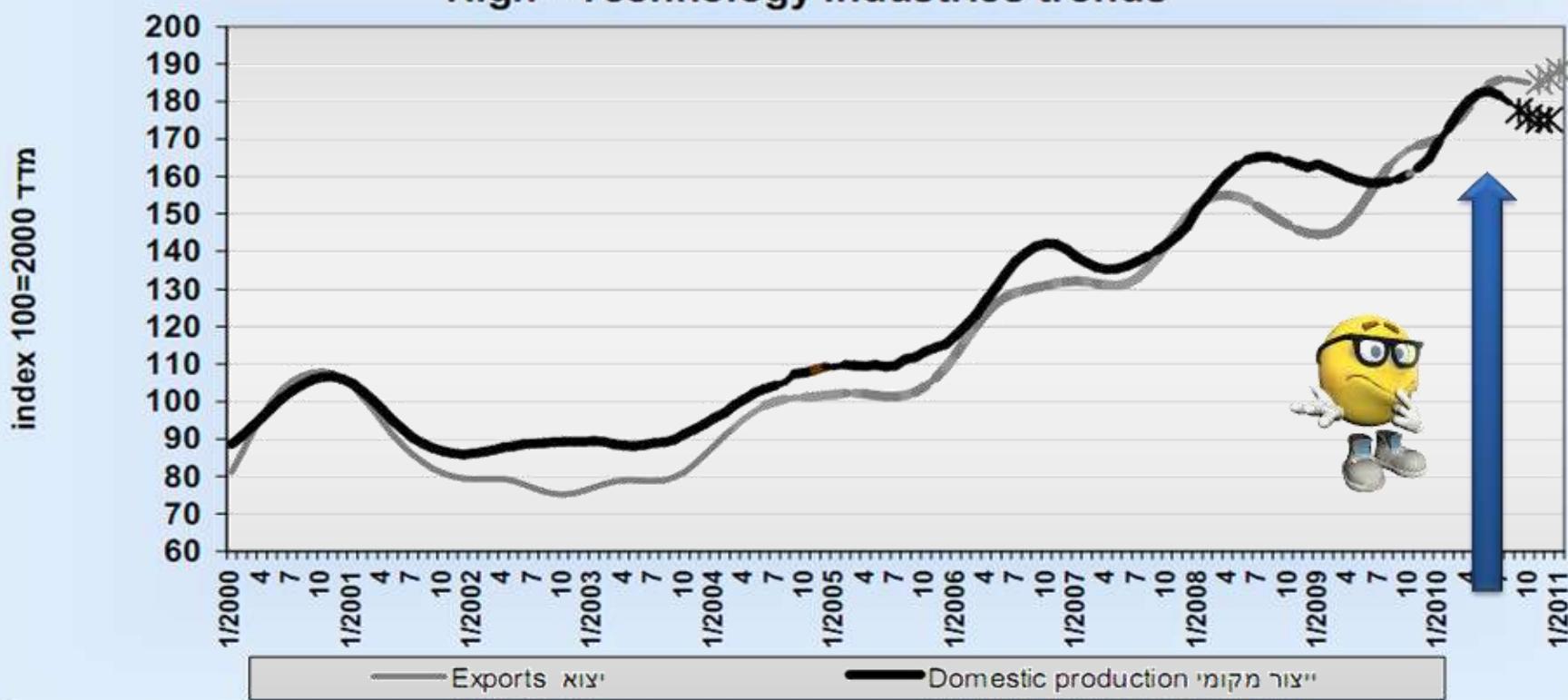
18.4 חלקם של ענפי ICT מכלל התוצר המקומי הגולמי, היצוא והמשרות
18.4 ICT Sector's Share of the Total Gross Domestic Product, Exports and Jobs
2004–2010

ICT gross value added out of the total business sector GDP[1] — ערך מוסף גולמי של ICT מסה"כ תמ"ג המגזר העסקי[1]
ICT exports out of the total goods and services exports[2] — יצוא ענפי ICT מסה"כ יצוא הסחורות והשירותים[2]
Jobs in ICT out of total jobs — משרות בענפי ICT מסה"כ המשרות
Jobs in ICT out of total jobs in the business sector — משרות בענפי ICT מסה"כ המשרות במגזר העסקי
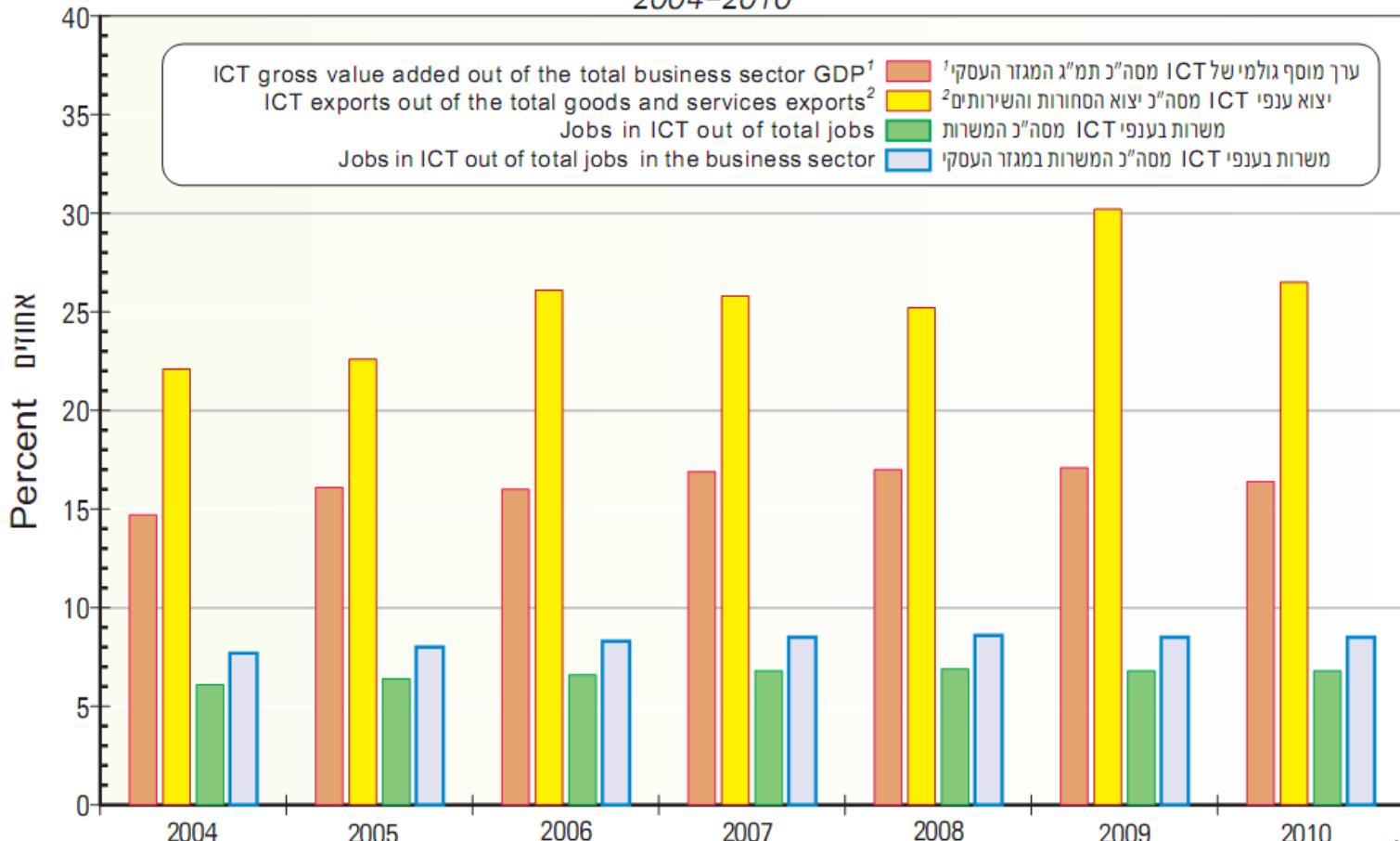
[1] Chained at 2005 prices.
[2] By classification of establishments, chained at 2005 prices.

[1] משורשר במחירי 2005.
[2] לפי סיווג החברות, משורשר במחירי 2005.

הלשכה המרכזית לסטטיסטיקה   CENTRAL BUREAU OF STATISTICS

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

סקר הערכת מגמות בעסקים: ינואר 2012
Business Tendency Survey: January 2012
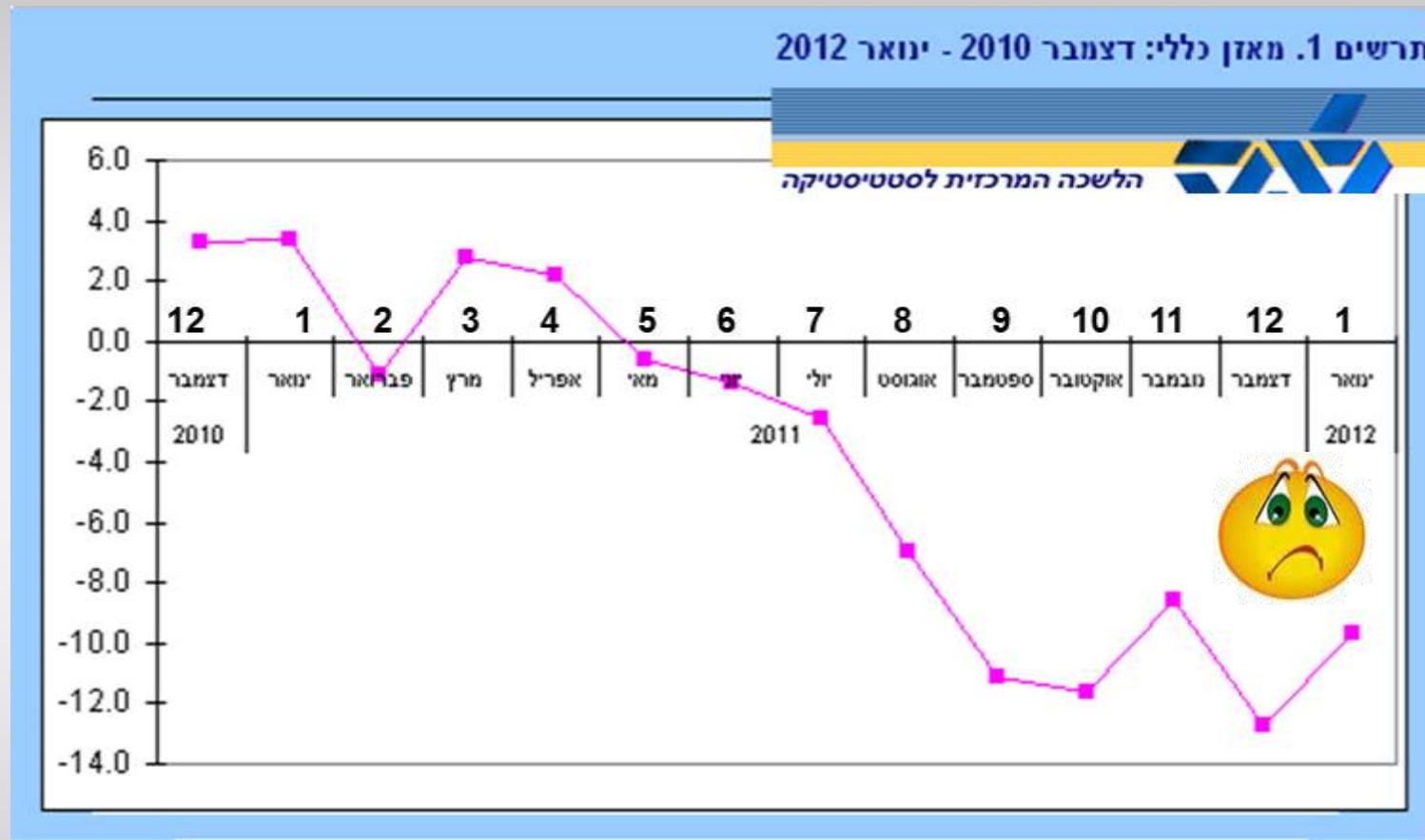
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Israel : IT Market Sizes
2012 Israel IT Market

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IT Israel 2012:
expectations from Bank Israel & STKI

State of the Israel Economy (Bank of Israel) % change*

(01.2006–01.2012)
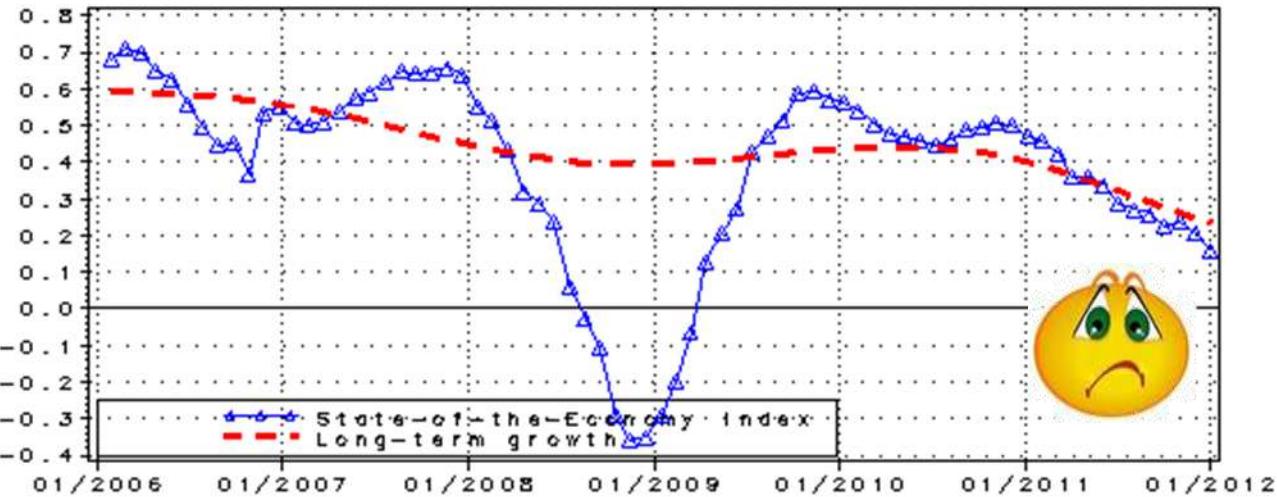
*Correlates with % change of the IT Market in Israel

Israeli IT people : Wow! Unprecedented times!
*If you can keep your head when all about
you are losing theirs...*

*Rudyard Kipling - 'If'

Number of "legal" entities paying taxes

Growth of 6.4 % in number of tax-paying companies 2010 to 2012

number of employees	number of companies (2/2011)	number of companies (2/2012)	& of TOTAL	subtotals		subtotals		& of TOTAL	number of companies (2/2010)	number of employees
251+	1,348	1,416	0.59%	3,814		3,298		0.10%	236	1001+
								0.18%	419	401-1000
101-250	2,384	2,398	1.00%					0.64%	1,470	151-400
								0.51%	1,173	101-150
51-100	3,871	4,040	1.64%	36,528	236,463	225,824	56,603	6.28%	14,419	21-100
10-50	31,720	32,488	13.43%					18.38%	42,184	6-20
up to 9	196,802	199,935	83.35%	199,935			169,221	73.71%	169,221	up to 5
TOTAL	240,277					441		0.15%	335	municipalities
								0.05%	106	government
						225,824				TOTAL

ACCORDING TO BITUACH LEUMI 2/2011 & 2/2012   *ACCORDING TO BITUACH LEUMI 2/2010*

We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

All amounts in M $ USD

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BUDGETS (opex/capex): include **some** internal expenses					
industry	Market size	% total	% total	Market size	industry
government	1,350	19.88%	33.87%	2,300	public
security	400	5.89%			
education	250	3.68%			
health	300	4.42%			
utilities	280	4.12%	8.54%	580	utilities/ transport
transport	300	4.42%			
banks	900	13.25%	21.35%	1,450	financial
insurance	350	5.15%			
fin other	200	2.95%			
manuf	820	12.08%	15.02%	1,020	manuf/ retail
retail	200	2.95%			
high tech	650	9.57%	12.37%	840	high tech/ IT
IT local vendors	190	2.80%			
telecomm	260	3.83%	5.15%	350	Telecomm/ media
media	90	1.33%			
SMB	250	3.68%	3.68%	250	SMB
TOTAL		6,790 M USD			TOTAL

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All amounts in M $ USD

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Why does the "STKI Market size" change?

The More I Think
The More Confused I Get

truth the
genuine or factual 2
true 3 a proven or

Oct-Dec 2011 ladder:
- 8 budget used
- invoices paid
- 7 capex re-approved
- 6 invoices approved
- contracts signed
- 5 RFP process
- capex re-approved
- 4 RFI process
- 3 opex re-approved
- 2 capex approved
- opex approved
- 1 budget requested

Oct-Dec 2011
Jan-Sept 2011
Oct-Dec 2010

Right ladder:
- 8 budget used
- invoices paid
- 7 capex re-approved
- 6 invoices approved
- contracts signed
- 5 RFP process
- capex re-approved
- 4 RFI process
- 3 opex re-approved
- 2 capex approved
- opex approved
- 1 budget requested

Oct-Dec 2012
Jan-Sept 2012
Oct-Dec 2011

Workers in company budget
Workers in project budget
Budget Capex forecasted
Budget Opex in maintenance
Workers in IT budget
Budget Capex in RFP process

Budget Capex Spent
Budget Opex forecasted
Contracts signed
Budget Opex Spent

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IT Markets in Israel

	2007		2008		2009		2010
HARDWARE	1,750,000	-27.14%	1,275,000	-3.53%	1,230,000	22.20%	1,503,000
SOFTWARE	732,150	14.73%	840,000	10.19%	925,620	21.22%	1,122,000
VALUE ADDED SERVICES	2,320,000	13.37%	2,630,200	-8.94%	2,395,000	11.15%	2,662,000
TOTAL	4,802,150	-1.19%	4,745,200	-4.10%	4,550,620	16.18%	5,287,000

	2010		2011		2012		2013
HARDWARE	1,503,000	13.04%	1,699,000	1.82%	1,730,000	3.35%	1,788,000
SOFTWARE	1,122,000	8.84%	1,221,200	5.49%	1,288,200	7.90%	1,390,000
VALUE ADDED SERVICES	2,662,000	12.58%	2,997,000	4.07%	3,119,000	11.61%	3,481,000
TOTAL	5,287,000	11.92%	5,917,200	3.72%	6,137,200	8.50%	6,659,000

Forecasted

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and
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IT Market (% change) in Israel (3/2012)

	IT budget change (spent data)				*forecasted	
	2007-8	2008-9	2009-10	2010-11	2011-12	2012-13
HARDWARE	-27.14%	-3.53%	22.20%	13.04%	1.82%	3.35%
SOFTWARE	14.73%	10.19%	21.22%	8.84%	5.49%	7.90%
VALUE ADDED SERVICES	13.37%	-8.94%	11.15%	12.58%	4.07%	11.61%
total	-1.19%	-4.10%	16.18%	11.92%	3.72%	8.50%

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Percent change per IT Market

Projects are difficult to stop but also to start

Software sales are not influenced by economic turns
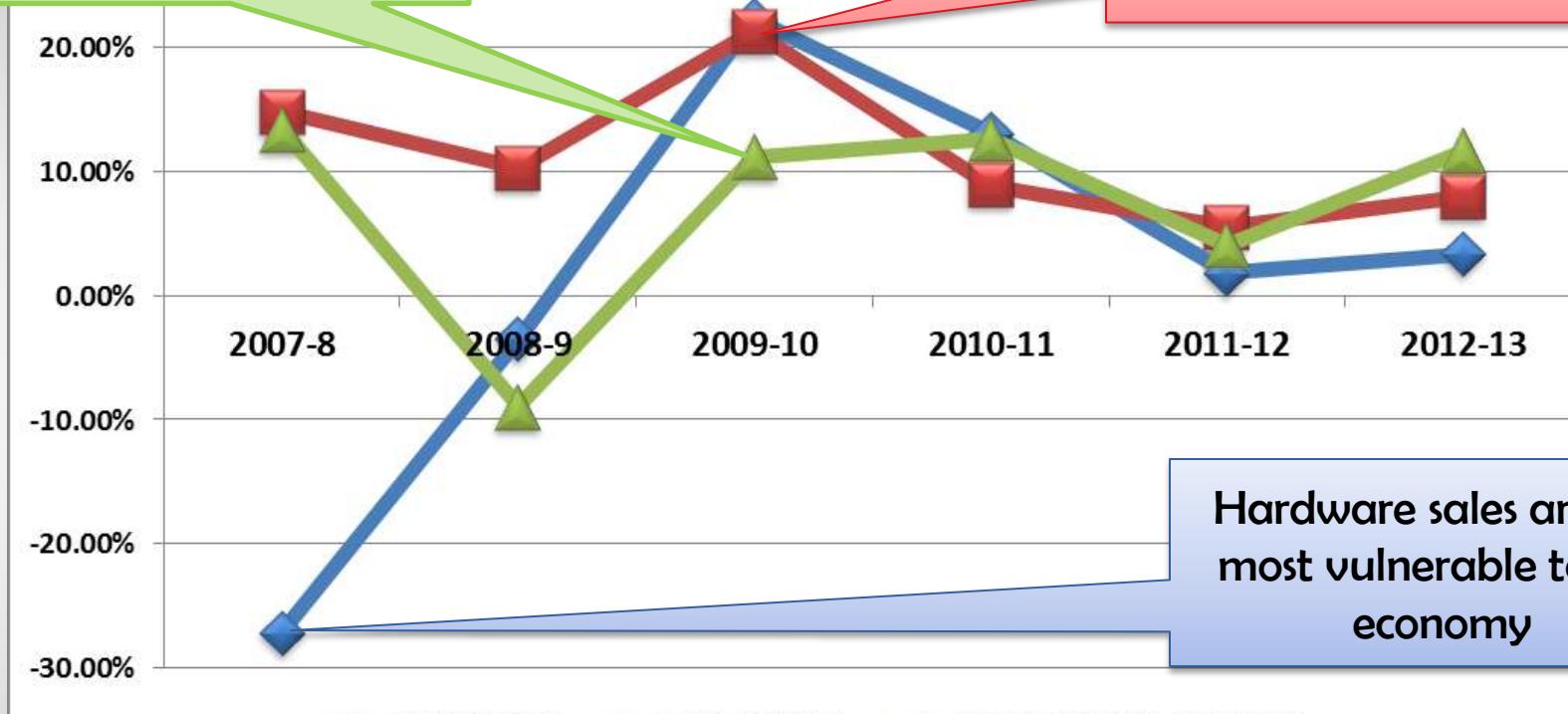
Hardware sales are the most vulnerable to the economy

20.00%

10.00%

0.00%

-10.00%

-20.00%

-30.00%

2007-8   2008-9   2009-10   2010-11   2011-12   2012-13

◆ HARDWARE   ■ SOFTWARE   ▲ VALUE ADDED SERVICES

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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30

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Total IT Market : TIERS
2012 Israel IT Market

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THE GREAT

A | | B
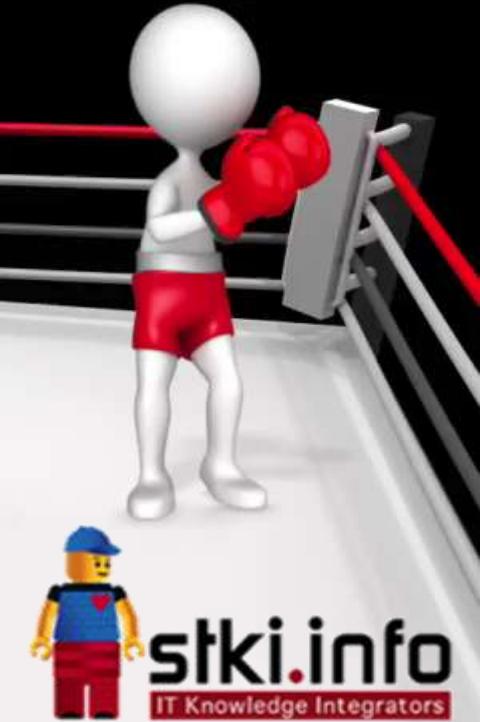
DEBATE

-"*It is not enough that I should succeed, others must fail* "-
Gore Vidal

First Tier

1rst
2nd
3rd
4th
5th
6th

SECOND TIER

1
2
3
4
4
6
:
N

We rank VENDORS by REVENUE and CLIENT MINDSHARE
All amounts in M $ USD

✳ Manufacturer (vendor)

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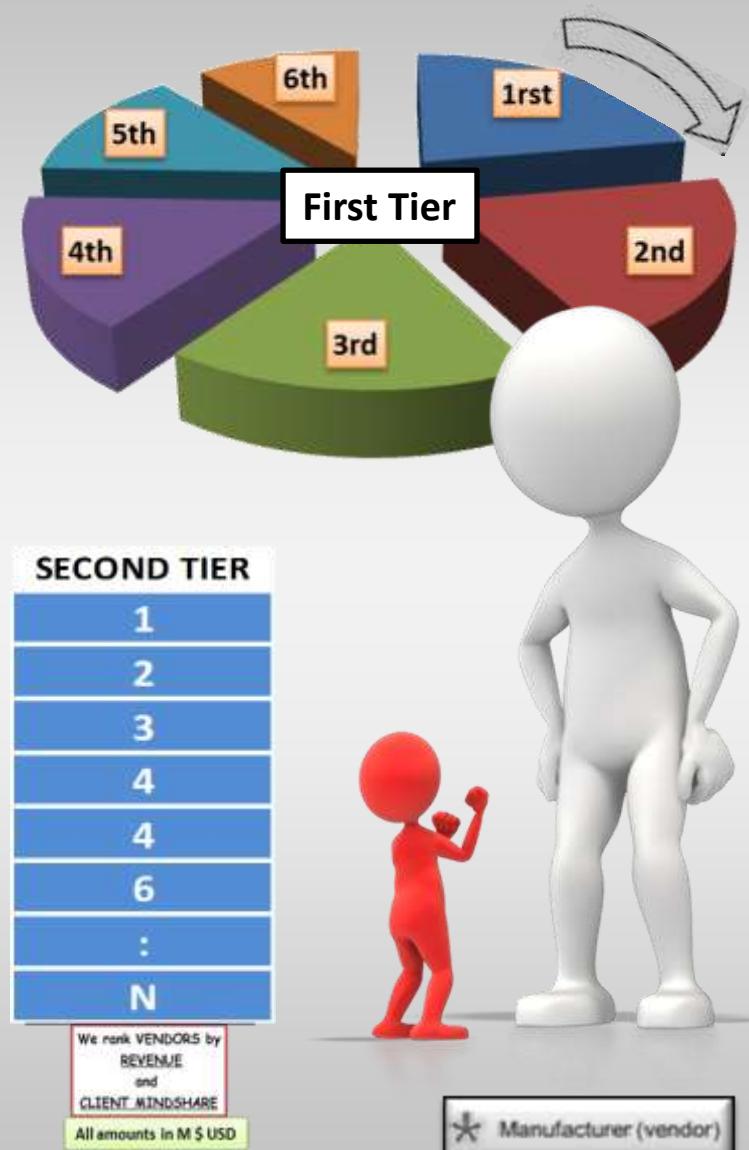
Value Added Resellers **"VAR or Partners"** are incorporated into STKI's "TIERS" as is the original product developer. Both sell into the Israeli Market.

IT department

value added reseller

* Manufacturer

- Adds VAS to product
- Sells several products

- Direct sales force
- VAR sales

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33
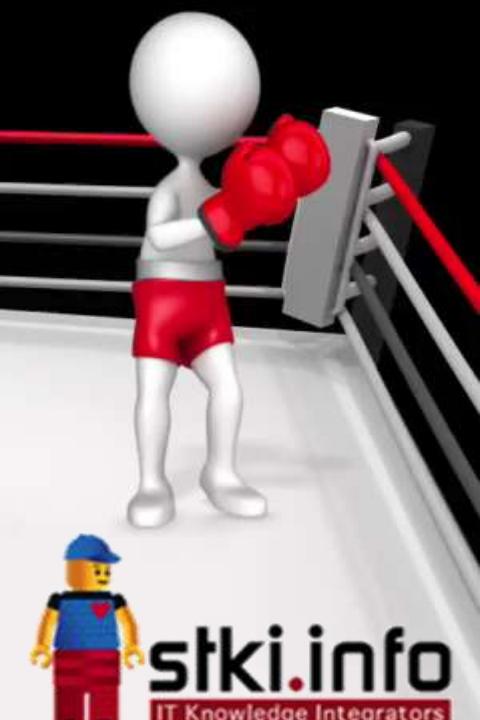
Biggest IT Vendors in Israel
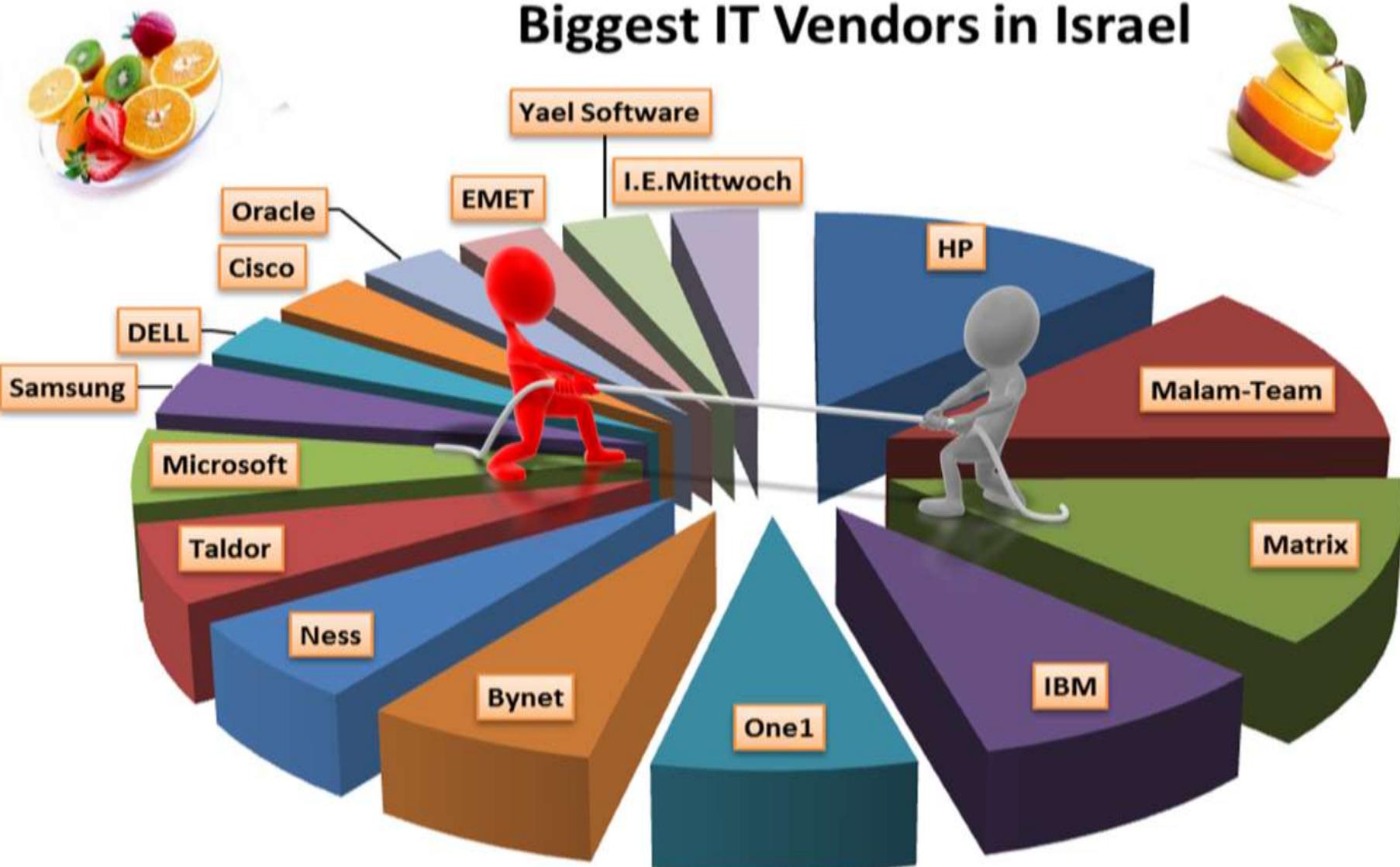
Yael Software
I.E.Mittwoch
EMET
Oracle
Cisco
DELL
Samsung
Microsoft
Taldor
Ness
Bynet
One1
HP
Malam-Team
Matrix
IBM

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Hardware Market : Tiers
2012 Israel Hardware Market

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Israel: IT Hardware Total Market 2011-2013

2011		2012		2013
1,699.0	1.82%	1,730.0	3.35%	1,788.0

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Top Hardware Vendors

Taldor

EMC

NetApp

I.E.Mittwoch

EMET

HP

iCon Group (Apple)

Malam-Team

LENOVO

Cisco

Bynet

One1

DELL

IBM

Samsung

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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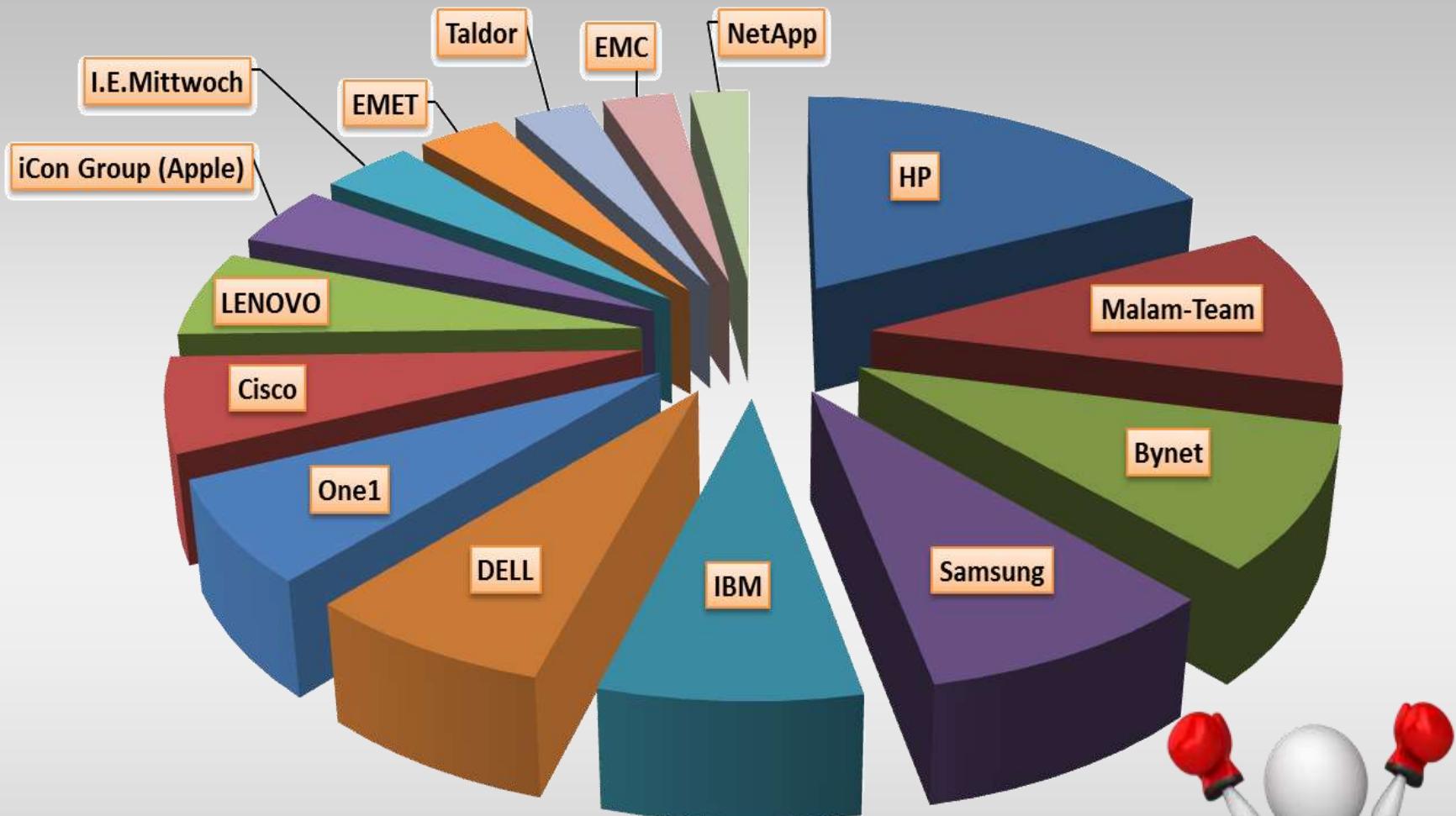
Server Market
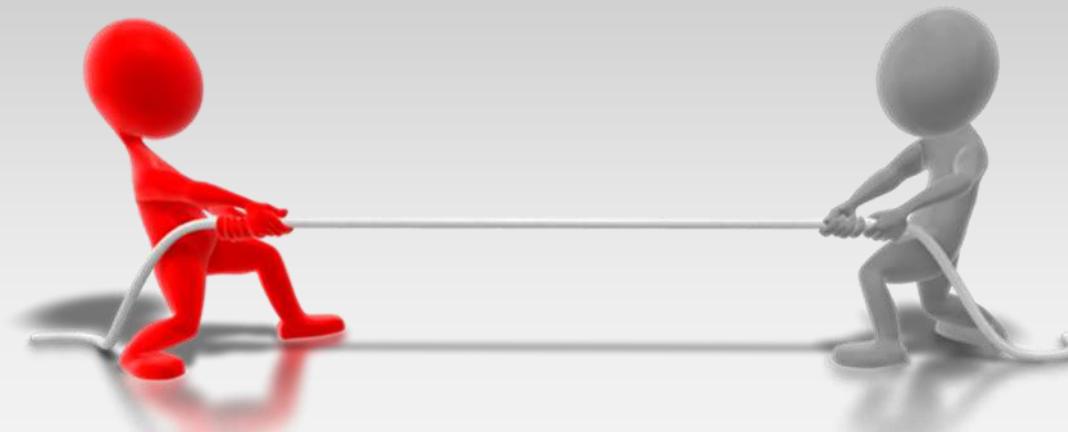
2011		2012		2013			
110.0	4.55%	115.0	4.35%	120.0	servers	x386	servers
130.0	15.38%	150.0	6.67%	160.0	blades		
60.0	-16.67%	50.0	-10.00%	45.0	legacy (non X86)		
12.0	50.00%	18.0	38.89%	25.0	DBMS Appliances		
312.0	6.73%	333.0	5.11%	350.0	totals		

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison Servers 2012

Rack-mounted servers

Labels: TripleC, Matrix, Yael Software, Bynet, I.E.Mittwoch, Oracle, We (Hilan), BenefIT, Ankor (Hilan), DELL, EMET, One1, IBM, HP, Malam-Team

Blade Servers

Labels: Matrix, I.E.Mittwoch, Oracle *, DELL*, TripleC, We (Hilan), EMET, Cisco*, Bynet, One1, Malam-Team, Yael Software, BenefIT, Ankor (Hilan), Taldor, HP*, IBM*

All amounts in M $ USD

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

39
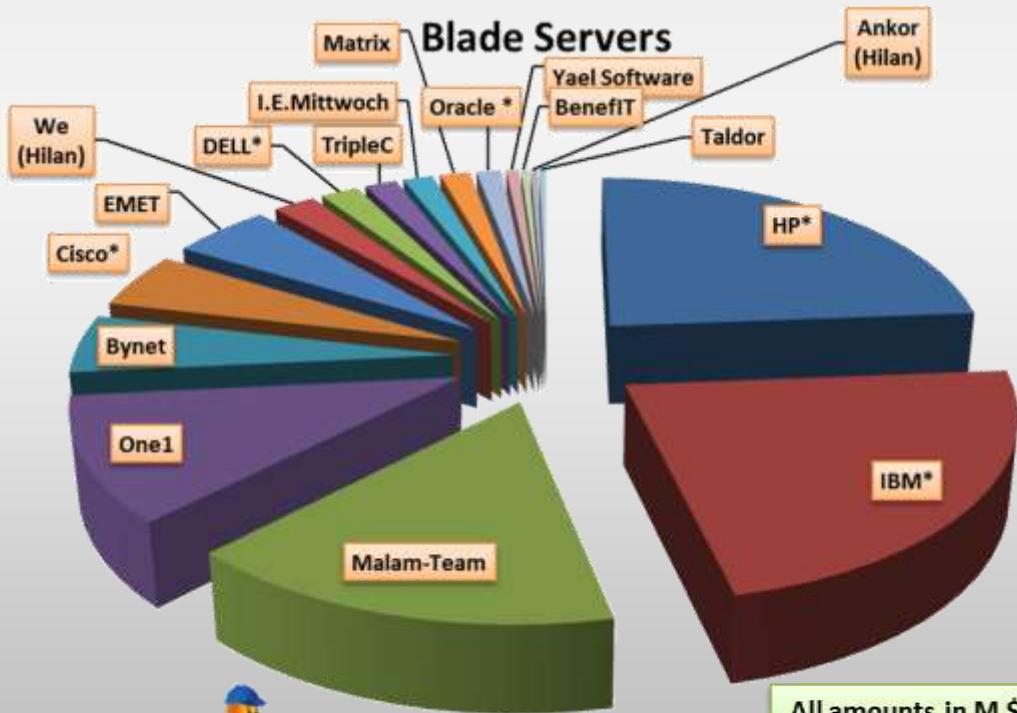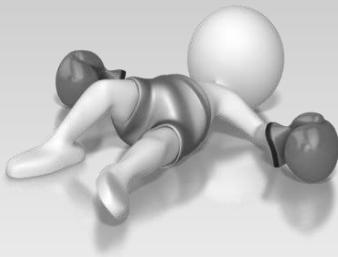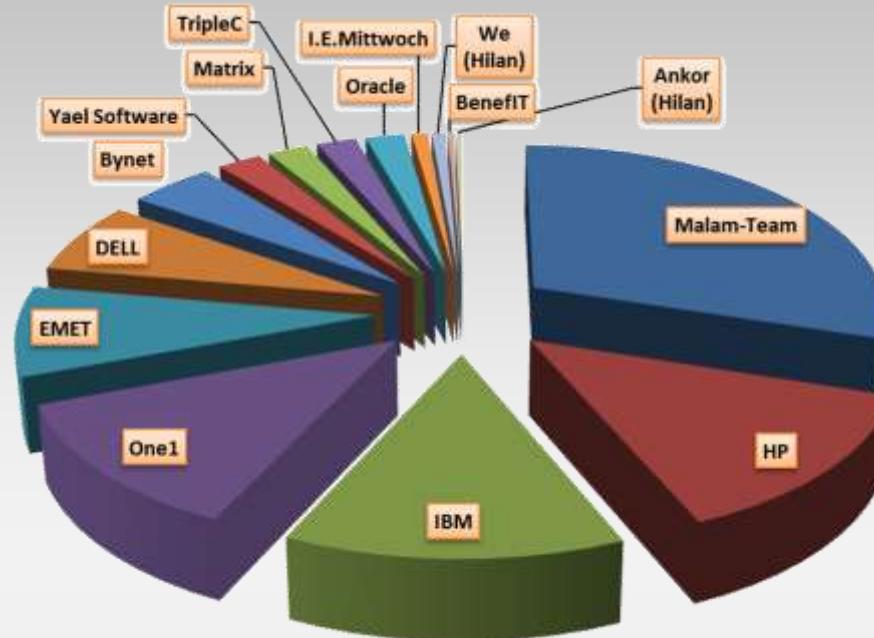
Client Market
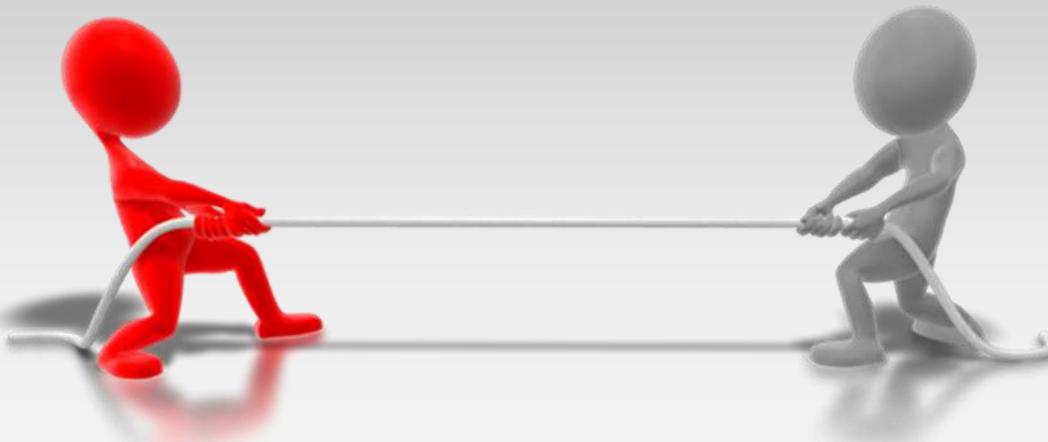
2011		2012		2013		
205.0	-11.22%	182.0	-3.85%	175.0	notebooks	
152.0	-13.16%	132.0	-16.67%	110.0	desk	
7.0	-28.57%	5.0	40.00%	7.0	thin clients	Clients
100.0	20.00%	120.0	25.00%	150.0	mobility/tablets	
464.0	-5.39%	439.0	0.68%	442.0	totals	

We rank VENDORS by
<u>REVENUE</u>
and
<u>CLIENT MINDSHARE</u>

All amounts in M $ USD

iPads: 400,000
iPhones: 1,500,000

Tablets: 100,000
Phones: 800,000

By the end of 2012 W8 will be a REAL COMPETITOR

Wintel: Q42011 compared to Q42010
Desktop PCs: -25%   Notebooks: -35%

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Comparison Clients 2012

Desktop Manufacturers

- iCon Group (Apple)*
- others
- DELL*
- LENOVO*
- HP*
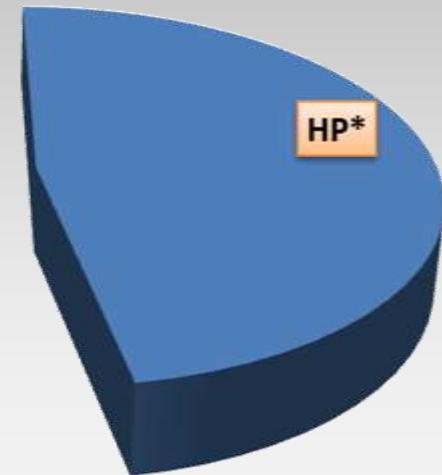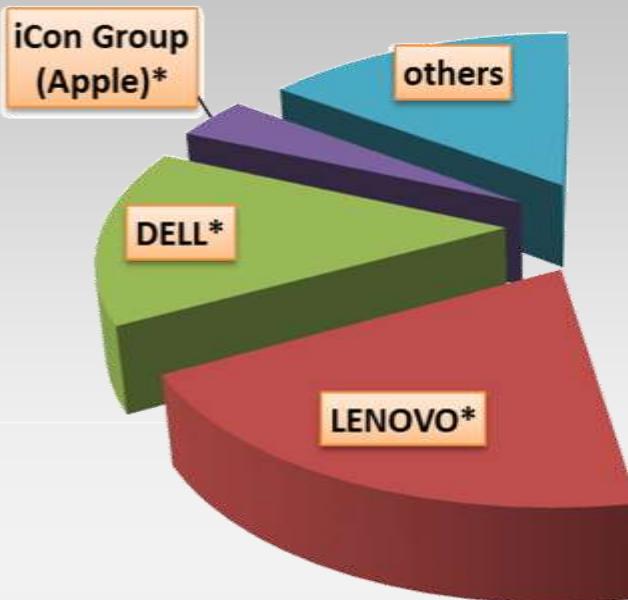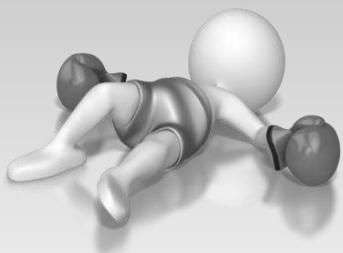
Notebook Manufacturers

- iCon Group (Apple)*
- LG*
- Acer*
- Toshiba*
- Samsung*
- DELL*
- LENOVO*
- HP*

All amounts in M $ USD

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We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE
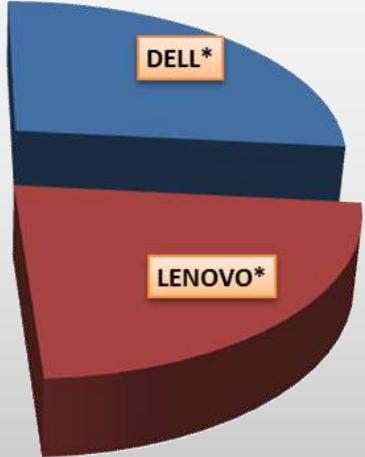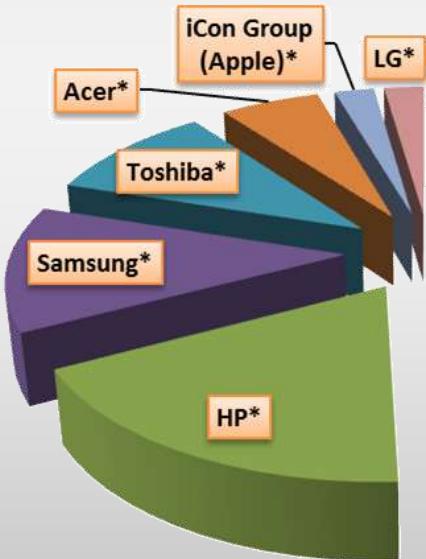
Storage Market
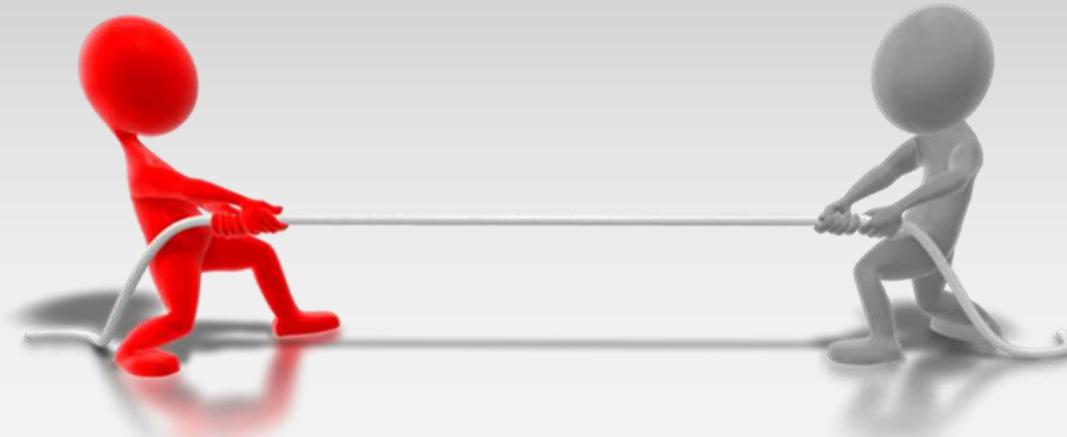
2011		2012		2013		
165.0	5.45%	174.0	6.90%	186.0	disks	
15.0	-33.33%	10.0	-20.00%	8.0	tapes	storage
180.0	2.22%	184.0	5.43%	194.0	totals	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Comparison Storage 2012

VTL backup appliances

Malam-Team · GlassHouse · EMET · Ankor (Hilan) · EMC · IBM · One1 · Bynet

disks

DELL · Yael Software · Oracle · Taldor · TripleC · DDN · Kaminario · Matrix · BenefIT · We (Hilan) · Bynet · GlassHouse · HP · IBM · HDS · Ankor (Hilan) · One1 · EMC · NetApp · Malam-Team

Tape Libraries*

Bynet · Ankor (Hilan) · TripleC · We (Hilan) · GlassHouse · I.E.Mittwoch · EMET · Oracle * · IBM*
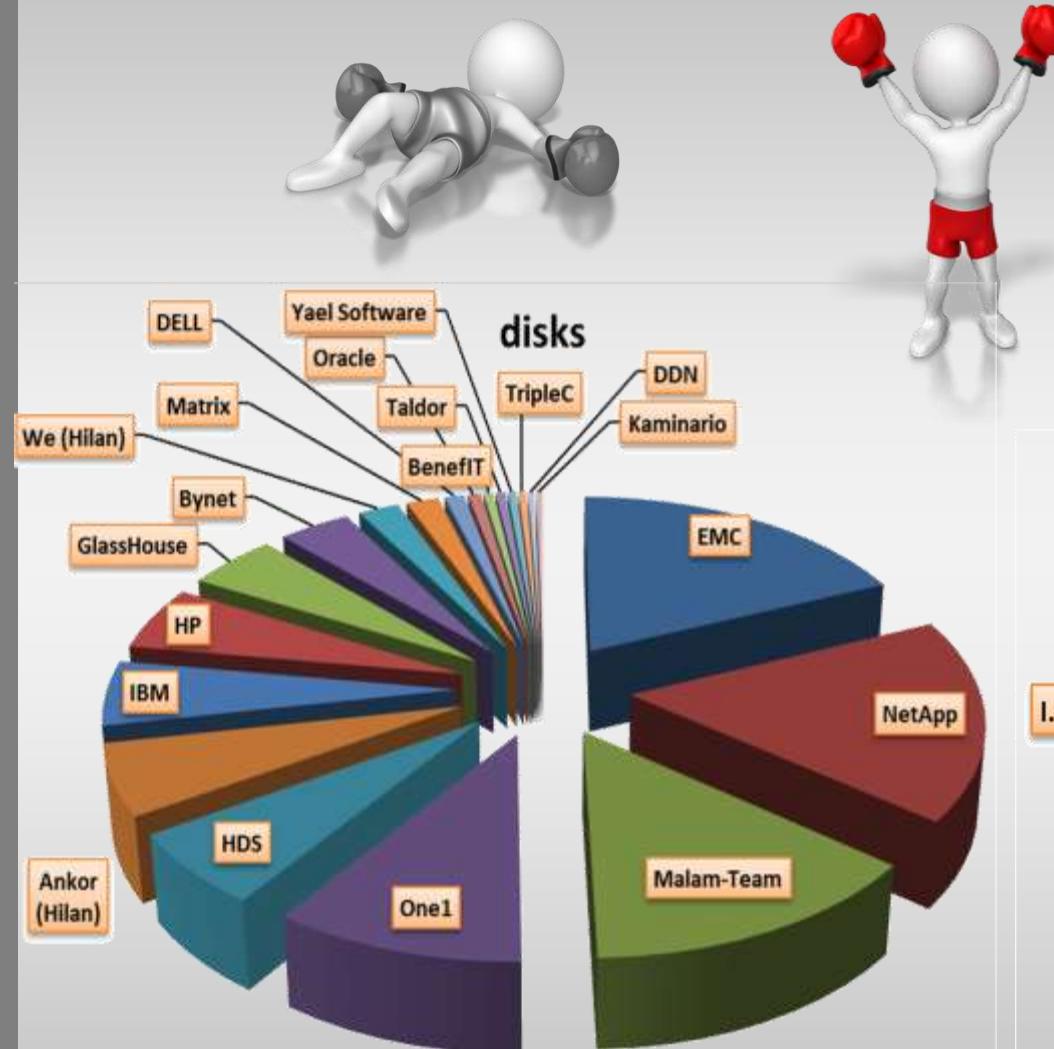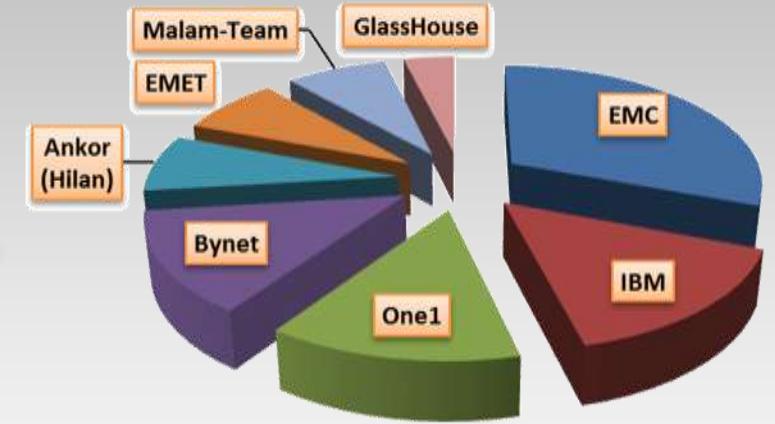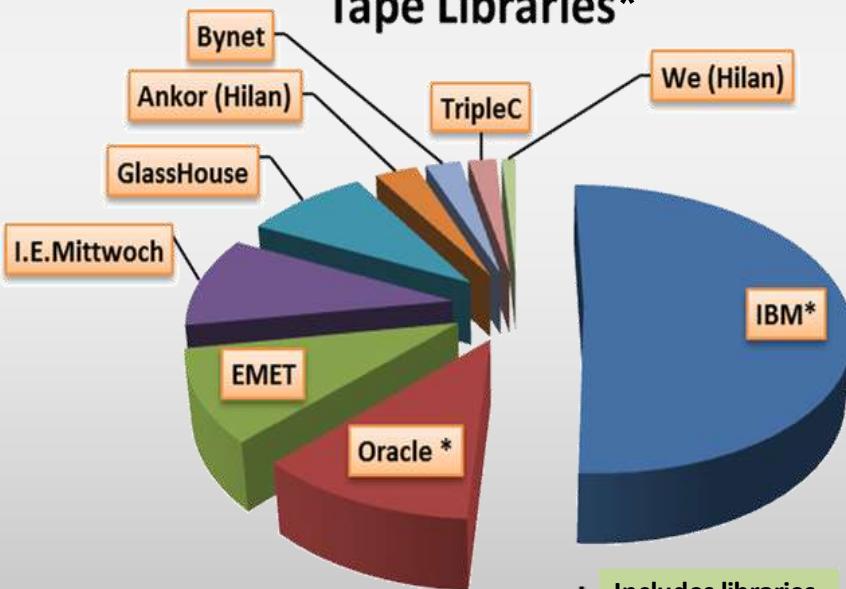
* **Includes libraries & supplies**

All amounts in M $ USD

We rank VENDORS by
REVENUE
and
<u>CLIENT MINDSHARE</u>

44

Networking Market
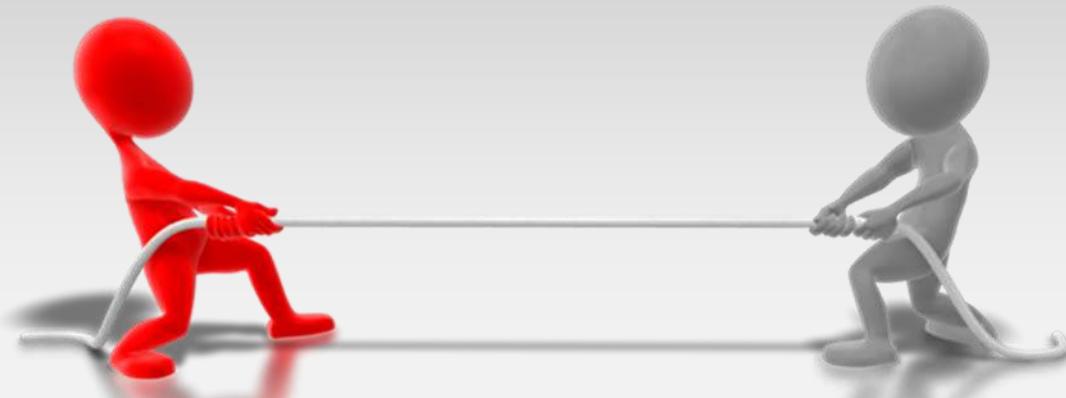
2011		2012		2013		
192.0	9.38%	**210.0**	6.19%	**223.0**	enterprise networking	
52.0	11.54%	**58.0**	10.34%	**64.0**	security equipment	networking
40.0	12.50%	**45.0**	11.11%	**50.0**	VoIP/call center equipment	
284.0	10.21%	**313.0**	7.67%	**337.0**	totals	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison Enterprise Networking 2012

Enterprise Networking

F5*
Avaya* 2Bsecure Alcatel-Lucent*
Bezeq Int
Netvision/Cellcom
HP*
Malam-Team
Juniper*
Taldor
Bynet
Cisco*
I.E.Mittwoch

One1
EMET
Radware*
Partner/012
Riverbed*
Brocade*
Matrix
Minicom
DELL*
A10*

All amounts in M $ USD

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REVENUE
and
CLIENT MINDSHARE

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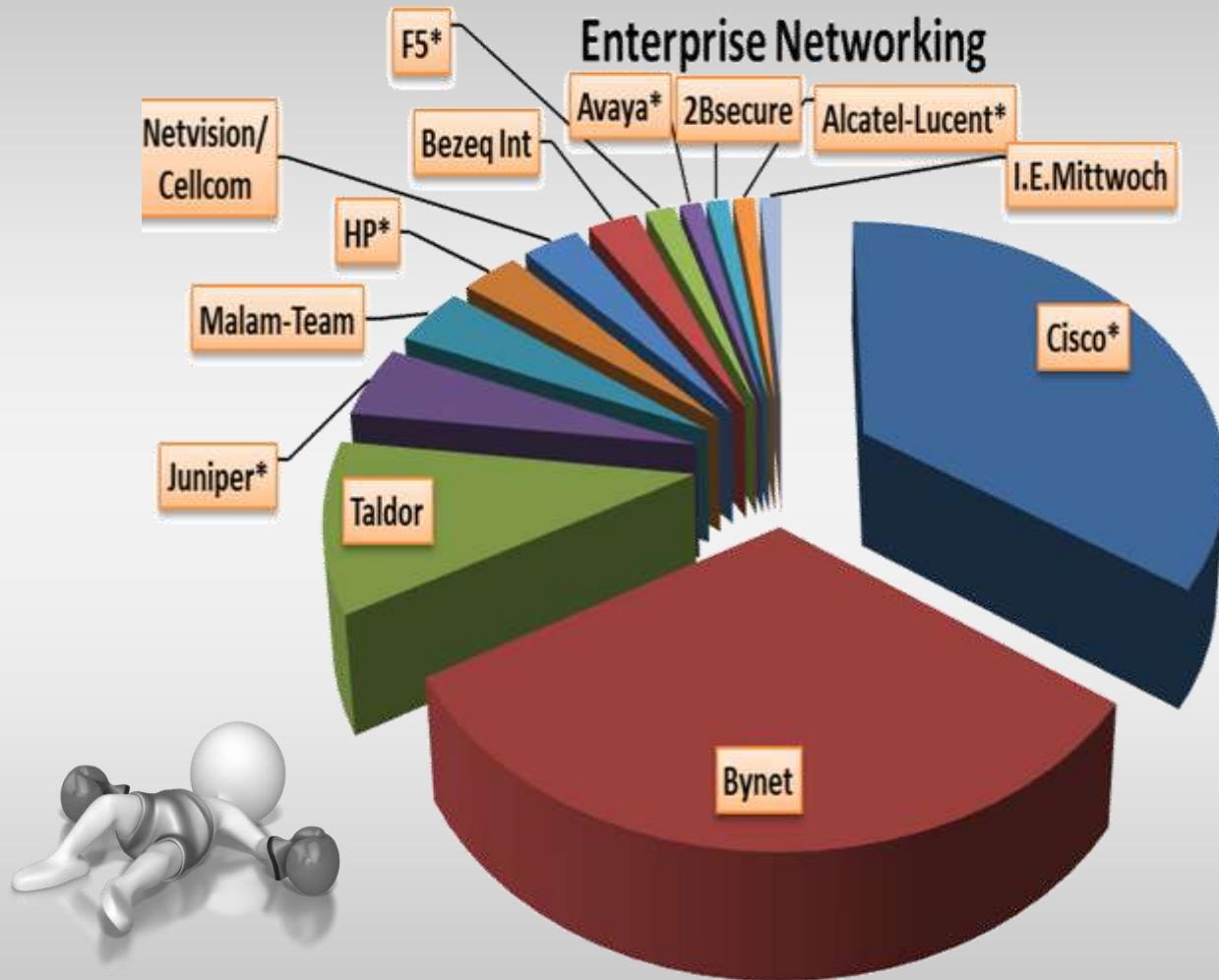
Comparison Security Appliances 2012
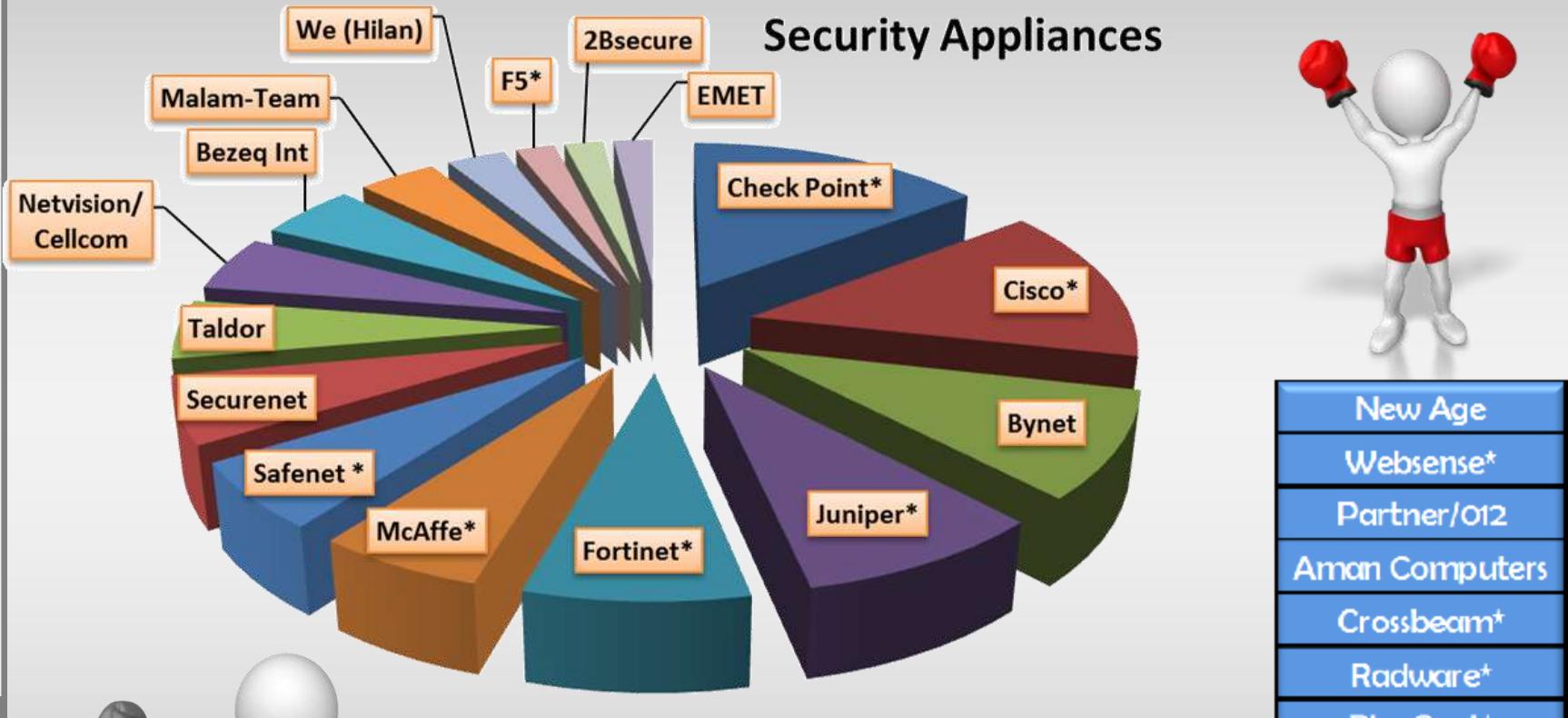
Security Appliances

Pie chart segments labeled:
- We (Hilan)
- F5*
- 2Bsecure
- EMET
- Malam-Team
- Bezeq Int
- Netvision/Cellcom
- Taldor
- Securenet
- Safenet *
- McAffe*
- Fortinet*
- Juniper*
- Bynet
- Cisco*
- Check Point*

| New Age |
| Websense* |
| Partner/012 |
| Aman Computers |
| Crossbeam* |
| Radware* |
| BlueCoat* |
| Virgonet |

All amounts in M $ USD

We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

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Comparison Networking (other) 2012

Videoconfering Equipment

Netvision/ Cellcom · Bezeq Int · Malam-Team · TripleC · Veidan · Polycom* · Cisco* · Bynet · AVCS · Taldor · Avcom

VoIP/Call Center

Alcatel-Lucent* · IT Navigator · IBM · Tadiran Telecom · Malam-Team · Bezeq Int · Avaya* · Bynet · I.E.Mittwoch · Cisco*

All amounts in M $ USD

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We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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48

Printer Market

2011		2012		2013		
124.0	-11.29%	110.0	-13.64%	95.0	printers	
85.0	4.71%	89.0	2.25%	91.0	toners/ink/refillers	Printer
209.0	-4.78%	199.0	-6.53%	186.0	totals	

Comparison Printers 2012

Printers

- I.E.Mittwoch
- Canon*
- EPSON*
- Brother*
- Xerox*
- Lexmark*
- One1
- Malam-Team
- Printer Center
- Yael Software
- Samsung*
- HP*

All amounts in M $ USD

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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IT Knowledge Integrators
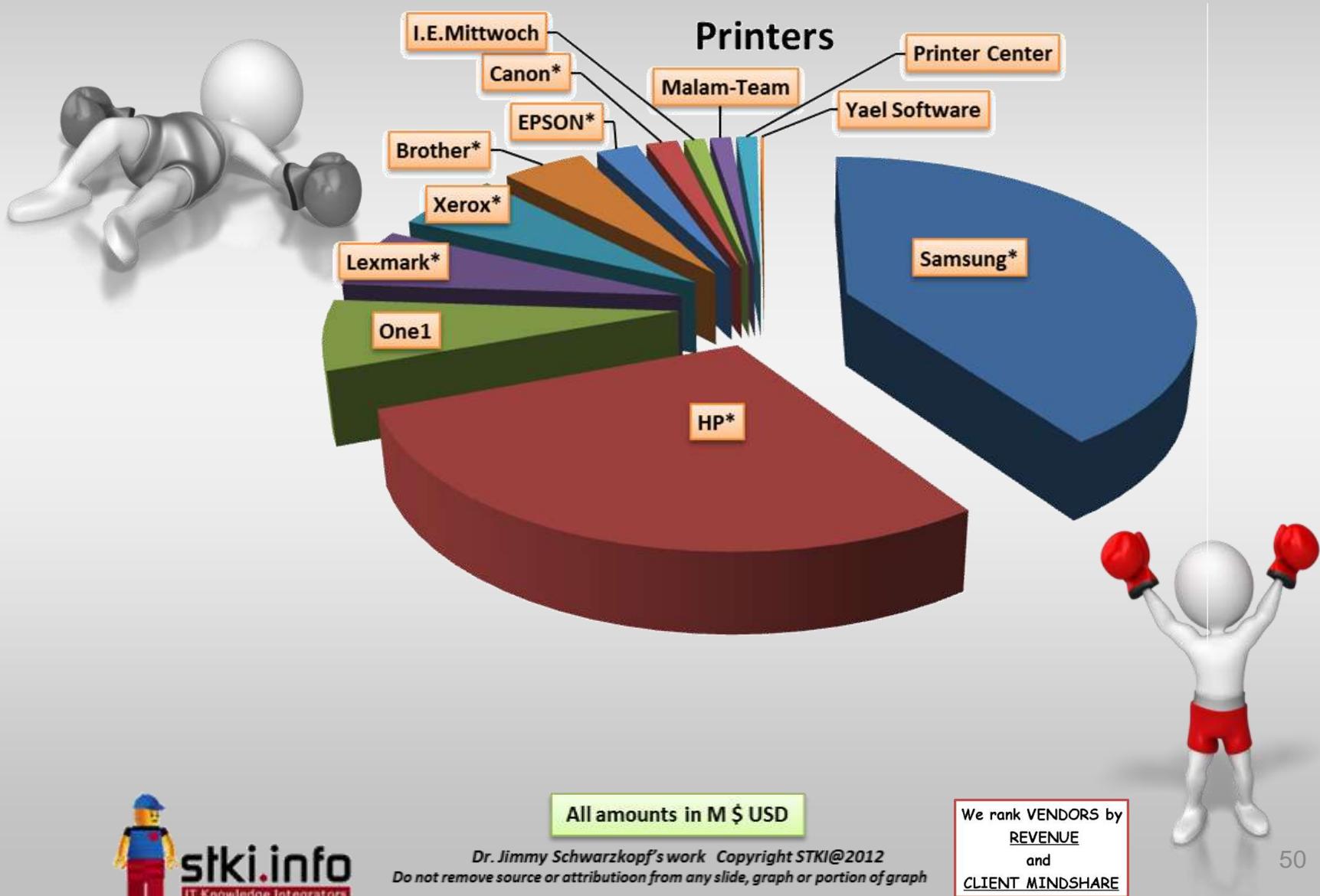
Specialty Hardware Market

2011		2012		2013	
60.0	3.33%	62.0	4.84%	65.0	Self Service Appliances (ATMs, Kiosks, etc)
30.0	6.67%	32.0	9.38%	35.0	Point of Sale Appliances
70.0	5.71%	74.0	9.46%	81.0	Data Center Physical Infrastructure
90.0	4.44%	94.0	4.26%	98.0	miscellaneous: Computer Supplies
250.0	4.80%	262.0	6.49%	279.0	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE
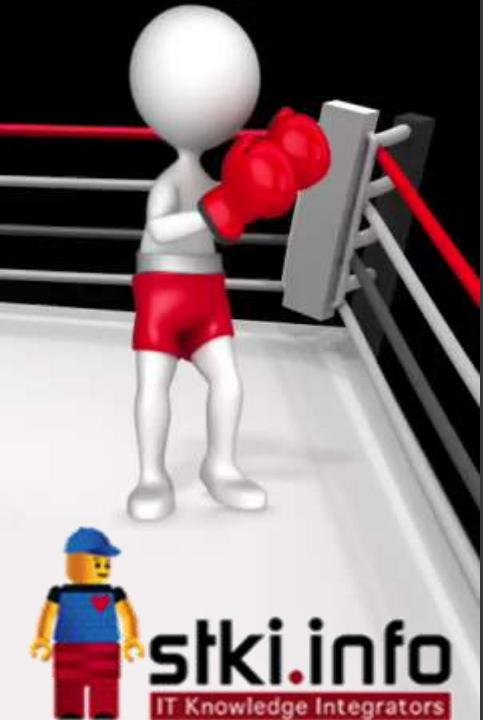
All amounts in M $ USD

Data Center Physical Equipment

Emerson*
Magalcom
Alexander Schneider
Rittal*
APC*

POS Appliances

Bynet
I.E.Mittwoch
One1
IBM
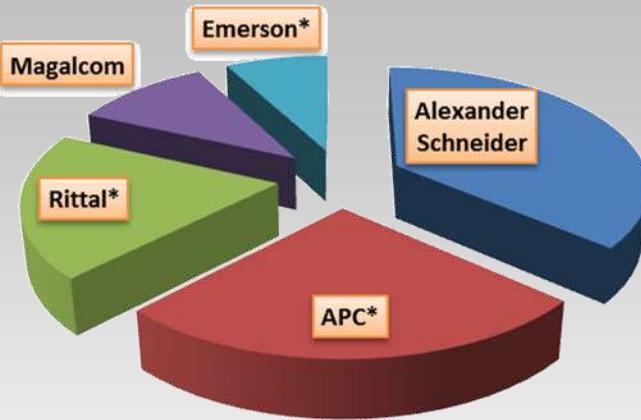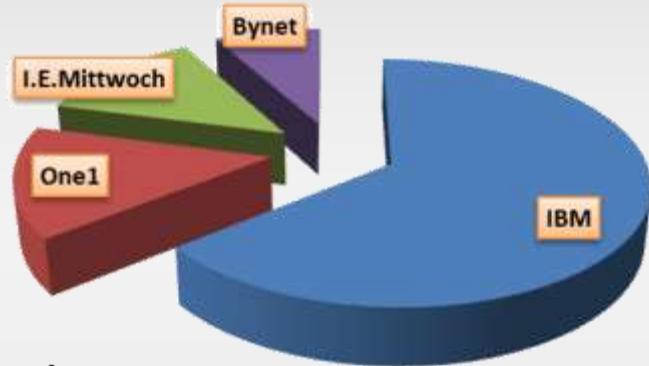
Self-Service (ATM, Kiosks, etc)
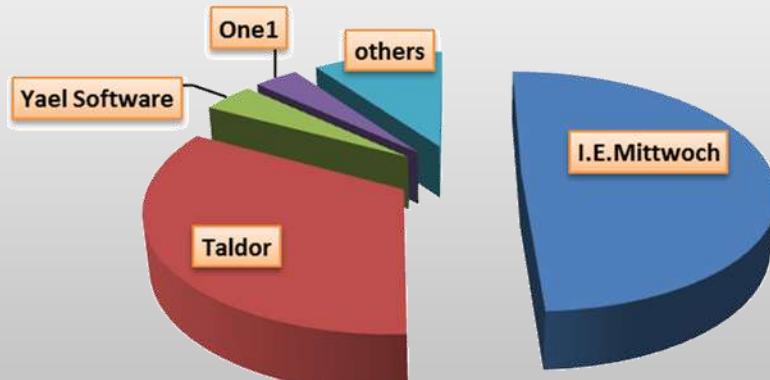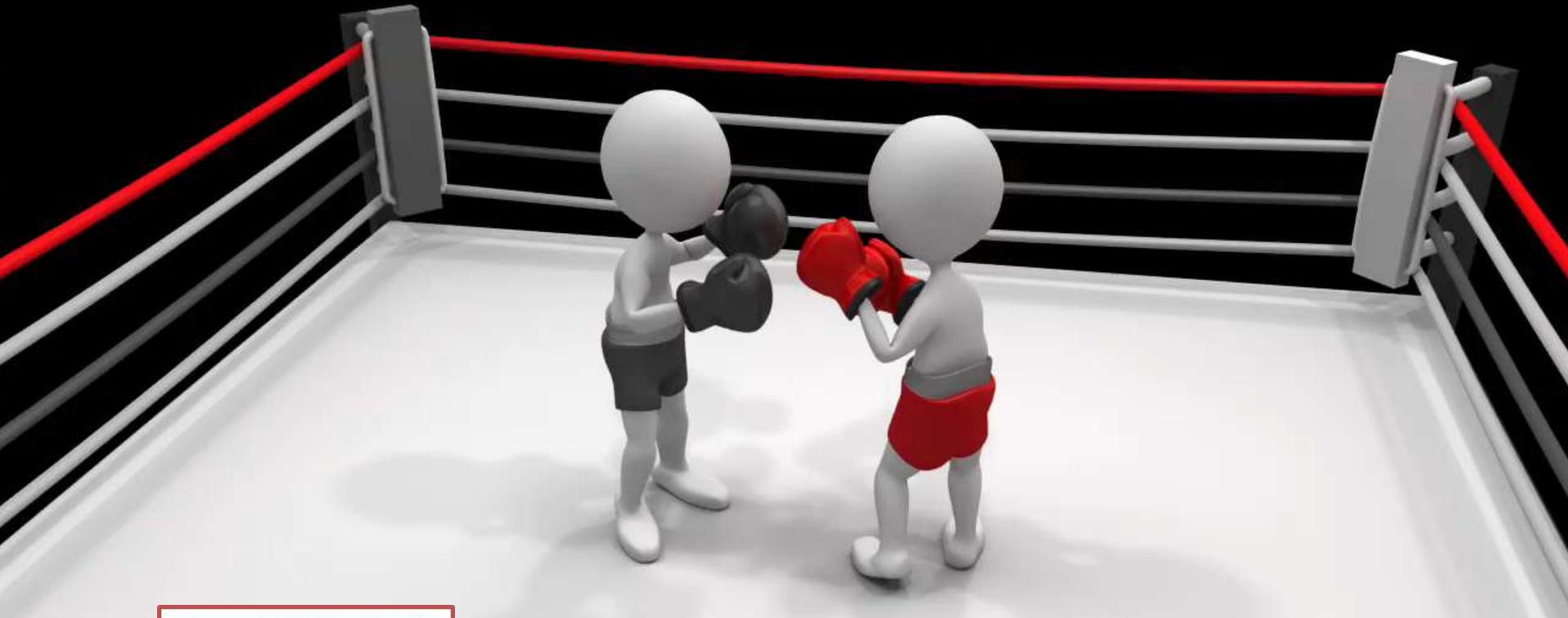
One1
others
Yael Software
I.E.Mittwoch
Taldor

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Software Market : **Tiers**
2012 Israel Software Market

Israel: IT Software Total Market 2011-2013

2011		2012		2013
1,221.2	5.49%	1,288.2	7.90%	1,390.0

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Top Software Vendors

Bynet

Aman Computers

Malam-Team

One1

Matrix

Ness

SAP

IBM

Microsoft

Oracle

Packages that can be used "only" as SaaS are cataloged under SaaS category "only"

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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IT Knowledge Integrators
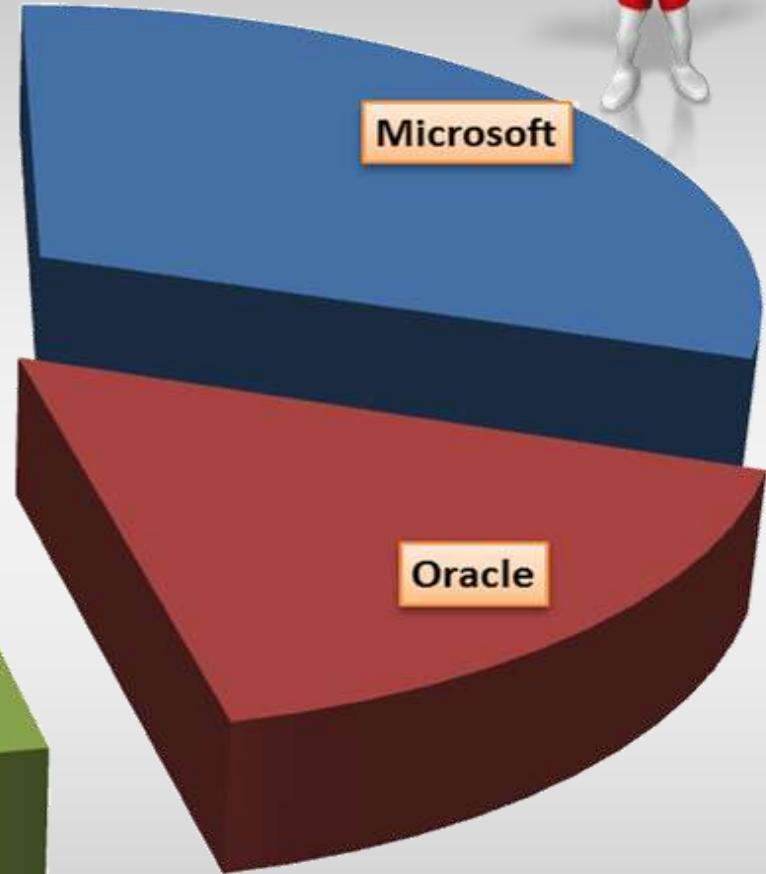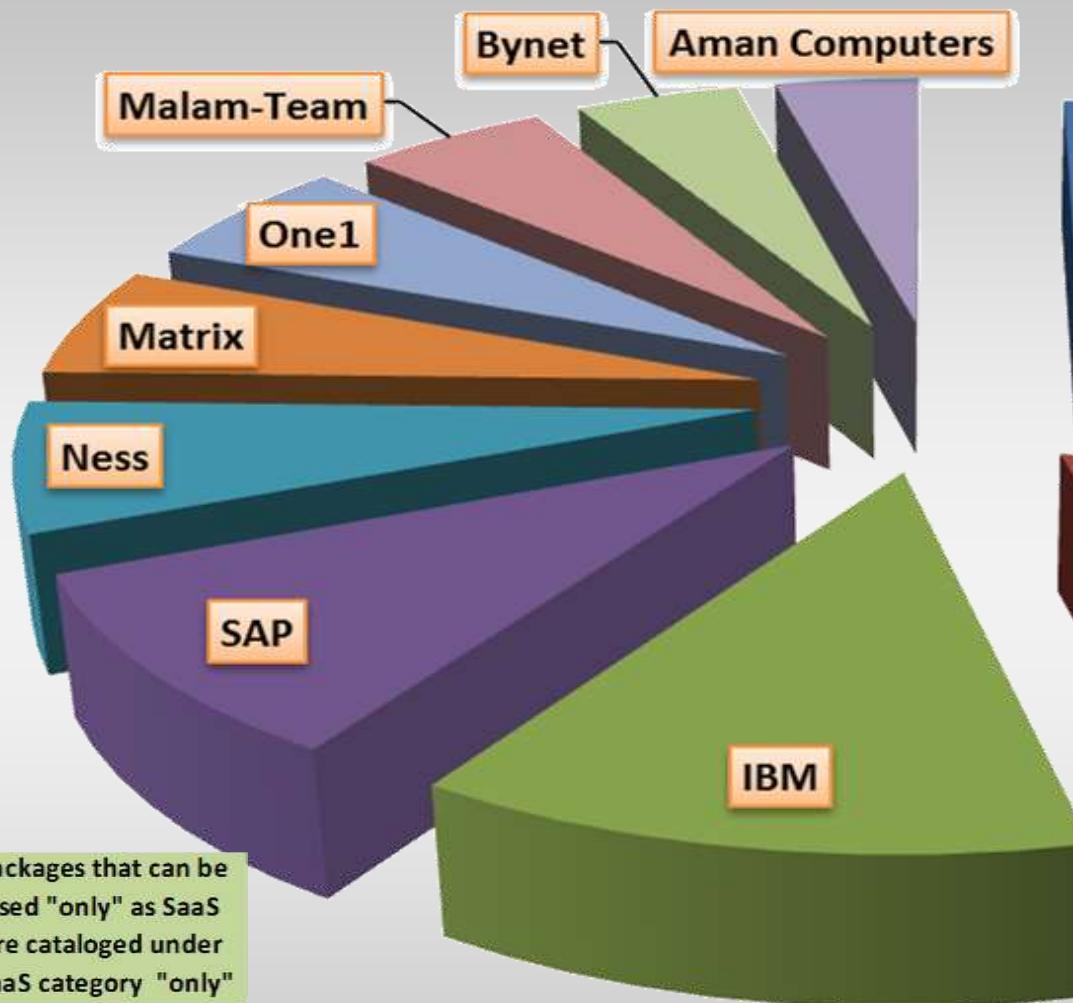
Software Categories 1

System Infrastructure	operating systems	מערכות הפעלה	מערכות תשתיתיות
	data bases	בסיסי נתונים	
	middleware	כלי תווכה	
	other	אחר	
IT Mgmt Tools	Service Desk	Service Desk	מערכות ניהול
	System Control & Mgmt Systems (BSM, APM, BTM)	שליטה ובקרה (כל הסוגים כולל חוויית משתמש, ניטור טרנזאקציות וכד')	
	storage & backup	אחסון וגיבוי	
	Security	אבטחת מידע	
	other	אחר	
Office of the CIO	Project & Portfolio Management	ניהול פרוייקטים ופורטפוליו	מערכות לניהול IT (תחום Office of the CIO)
	Asset Management	ניהול נכסי IT	
	Governance Risk & Compliance	ציות רגולציות וניהול סיכונים	
	other	אחר	
Development Tools	Development and ALM (including testing)	פיתוח ובדיקות תוכנה	כלי פיתוח
	mobile development tools	פלטפורמות לפיתוח מובייל	
	PLM	PLM	
	LMS learning management	LMS - כלי ניהול למידה	
	other	אחר	

System Infrastructure Software Market

| 2011		2012		2013		
78.0	-3.85%	75.0	-6.67%	70.0	operating systems	Basic Systems
83.0	-3.61%	80.0	-2.50%	78.0	data bases	
65.0	10.77%	72.0	4.17%	75.0	middleware	
226.0	0.44%	227.0	-1.76%	223.0	totals	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison
System Infrastructure
2012

Operating Systems

- Matrix
- Malam-Team
- One1
- HP
- IBM
- Aman Computers
- Bynet
- Microsoft
- VMWare

Middleware

- Magic
- Taldor
- SoftwareAg
- e-Business Design
- Attunity
- Malam-Team
- Yael Software
- One1
- Microsoft
- IBM
- Matrix
- Oracle

DBMS

- One1
- IBM
- Ness-SAP
- SoftwareAg
- Microsoft
- Oracle

All amounts in M $ USD

We rank VENDORS by
REVENUE
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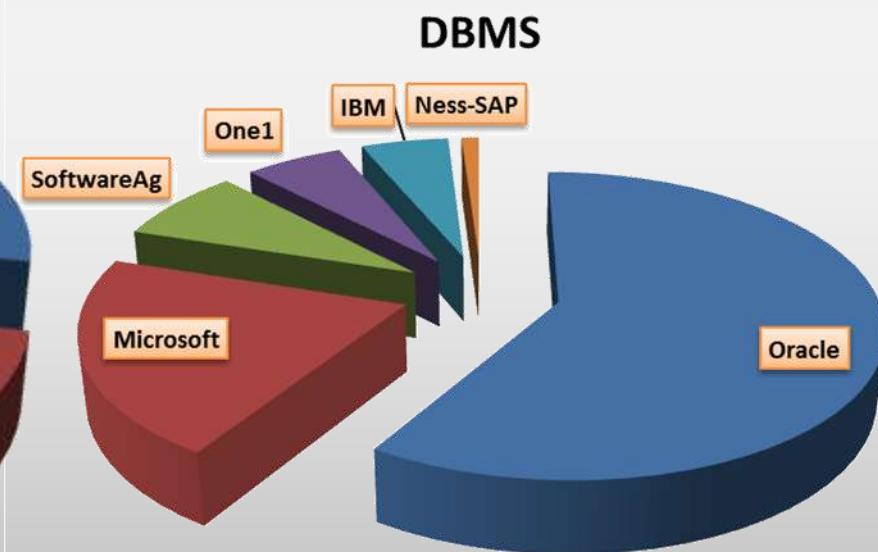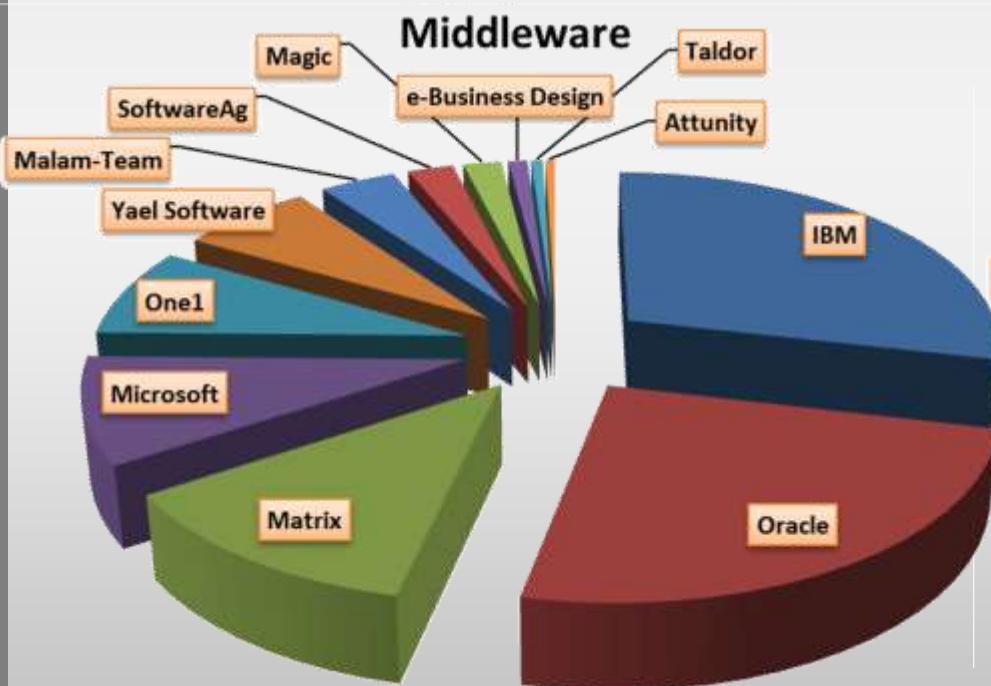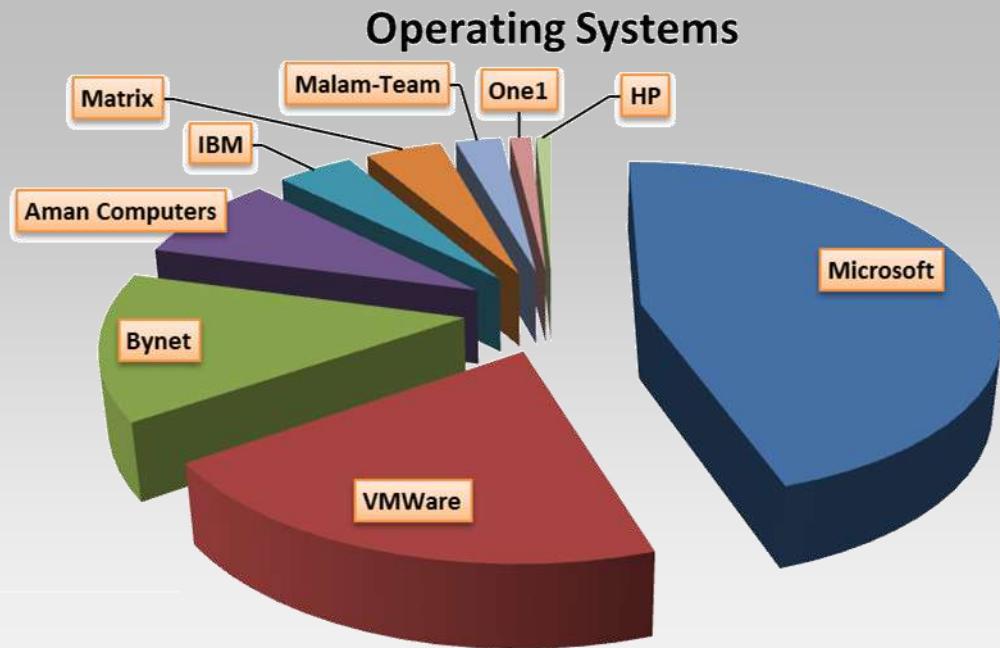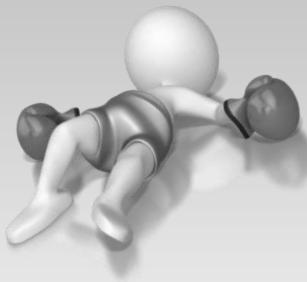
IT Management Tools Software Market
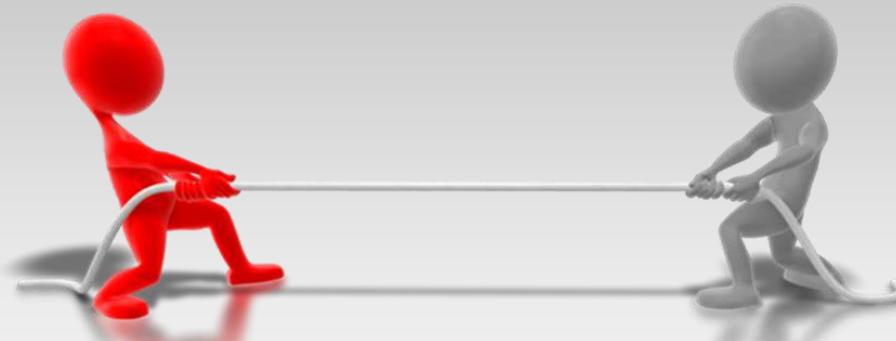
| 2011		2012		2013	
15.0	13.33%	17.0	17.65%	20.0	Service Desk
75.0	4.00%	78.0	6.41%	83.0	Systems Control and Mgmt
64.0	6.25%	68.0	5.88%	72.0	Storage/ backup
127.0	3.94%	132.0	6.06%	140.0	Security
281.0	4.98%	295.0	6.78%	315.0	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison IT Management Tools 1 Market 2012

Service Desk

- Consist
- HP*
- One1
- Taldor
- IBM*
- Matrix
- CA*+ Ness
- Microsoft+

System Control & Mgmt Systems (BSM, APM, BTM)

- I.E.Mittwoch
- Magalcom
- Headon
- Bynet
- Avaya
- Centerity
- Aman Computers
- BenefIT
- Malam-Team
- Oracle
- Matrix
- Microsoft
- HP
- BMC
- CA
- IBM

Storage & Backup

- One1
- Blocal
- Ankor (Hilan)
- We (Hilan)
- EMET
- HDS
- Taldor
- Wanova
- openstorage
- Malam-Team
- IBM
- Bynet
- Symantec
- NetApp
- GlassHouse
- EMC

System Control & Mgmt Systems (BSM, APM, BTM)
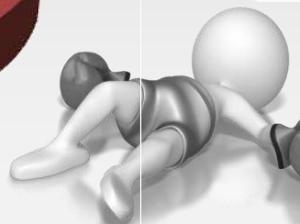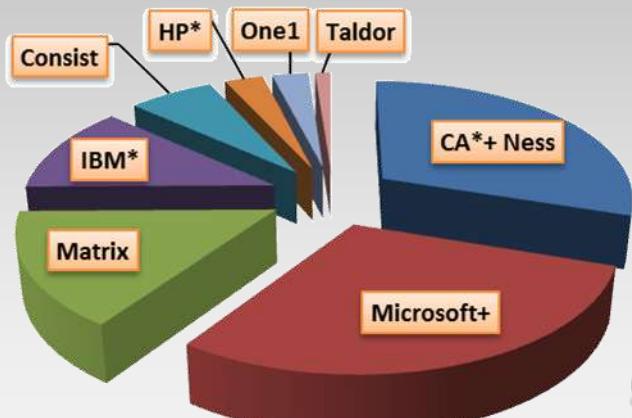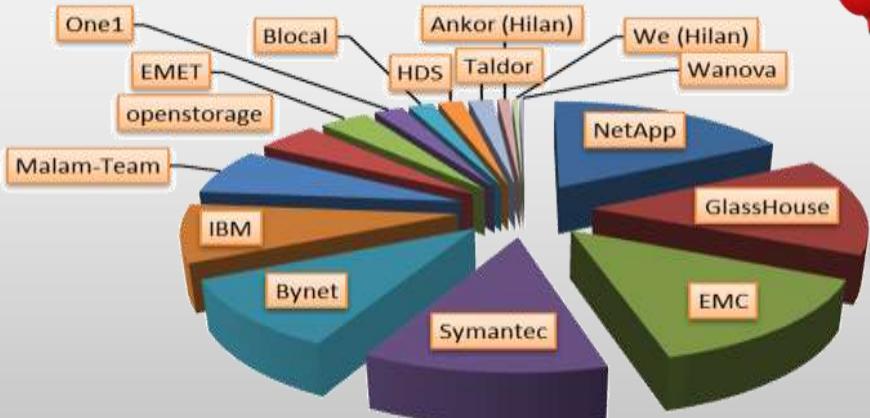
- Alexander Schneider
- Trigerplus
- ACS
- Agile Sparks
- GlassHouse
- Ness
- Ankor (Hilan)
- IT Analyzer
- One1
- Taldor
- We (Hilan)
- evolen
- IntegrITy
- neebula
- venotion
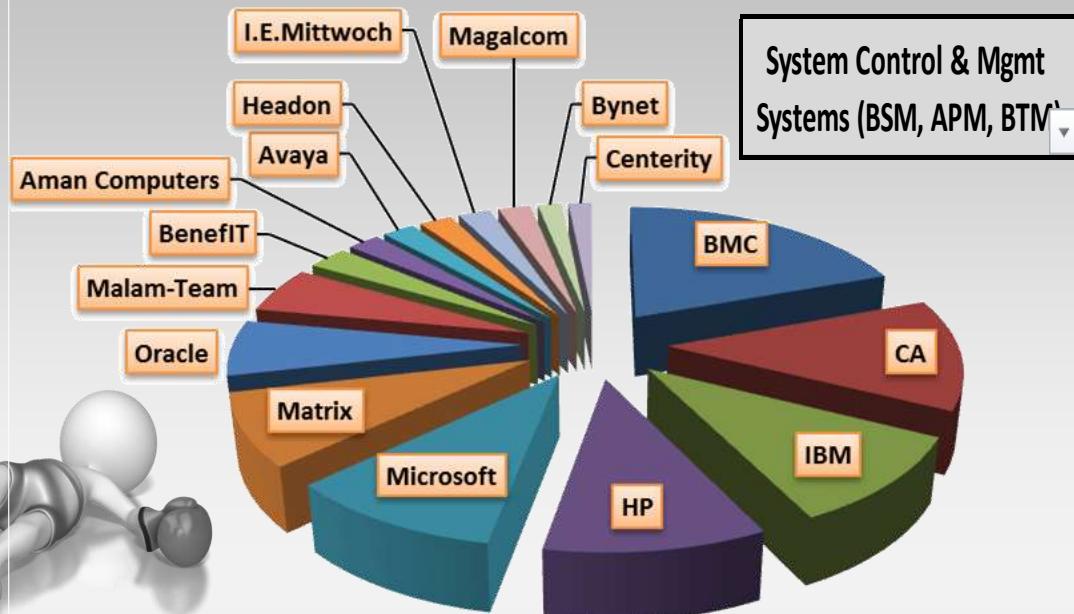
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60
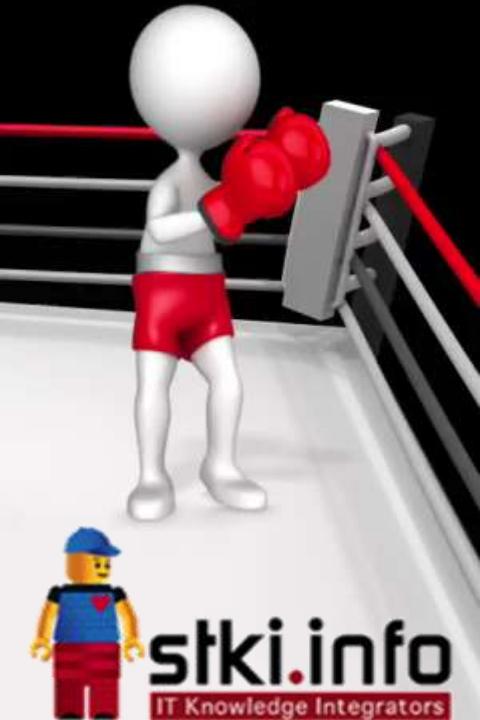
Comparison
IT Management Tools 2 Market 2012

Security Software

CyberArk*	New Age	Oranus	Radvision
calcom	Securenet	Wise	Secure Islands
Innocom	Websense	Brillix	Varonis
Netvision/ Cellcom	Oracle	Covertix	Waterfall
Trustnet	ARX	GreenSQL	ACS
We (Hilan)	Avnet	IntegrITy	Barracuda
IBM*	ForeScout	Intellinx	Networks
Accesslayers*	Fortinet	Kaspersky Labs	Virgonet
EMET	Promisec	Mobisec	SoftwareAg
I.E.Mittwoch	Websense	Prolink	Cryptzone
Imperva	Comda		
Microsoft	MultiPoint		

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Office of the CIO Software Market
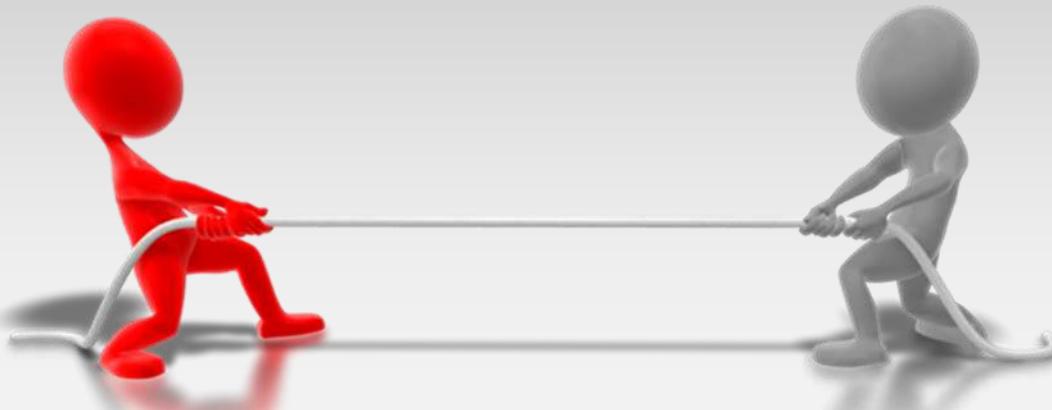
| 2011		2012		2013	
7.0	28.57%	9.0	22.22%	11.0	Portfolio Mgmt
15.0	13.33%	17.0	29.41%	22.0	Project Management
9.0	22.22%	11.0	36.36%	15.0	Asset Mgmt
50.0	8.00%	54.0	14.81%	62.0	Governance, Risk & Compliance

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Office of CIO Software Market 2012

Project & Portfolio Management Tools

Methoda

Orantech

IBM

Matrix

One1

Xioma

MSP

Microsoft

CA (Proceed)
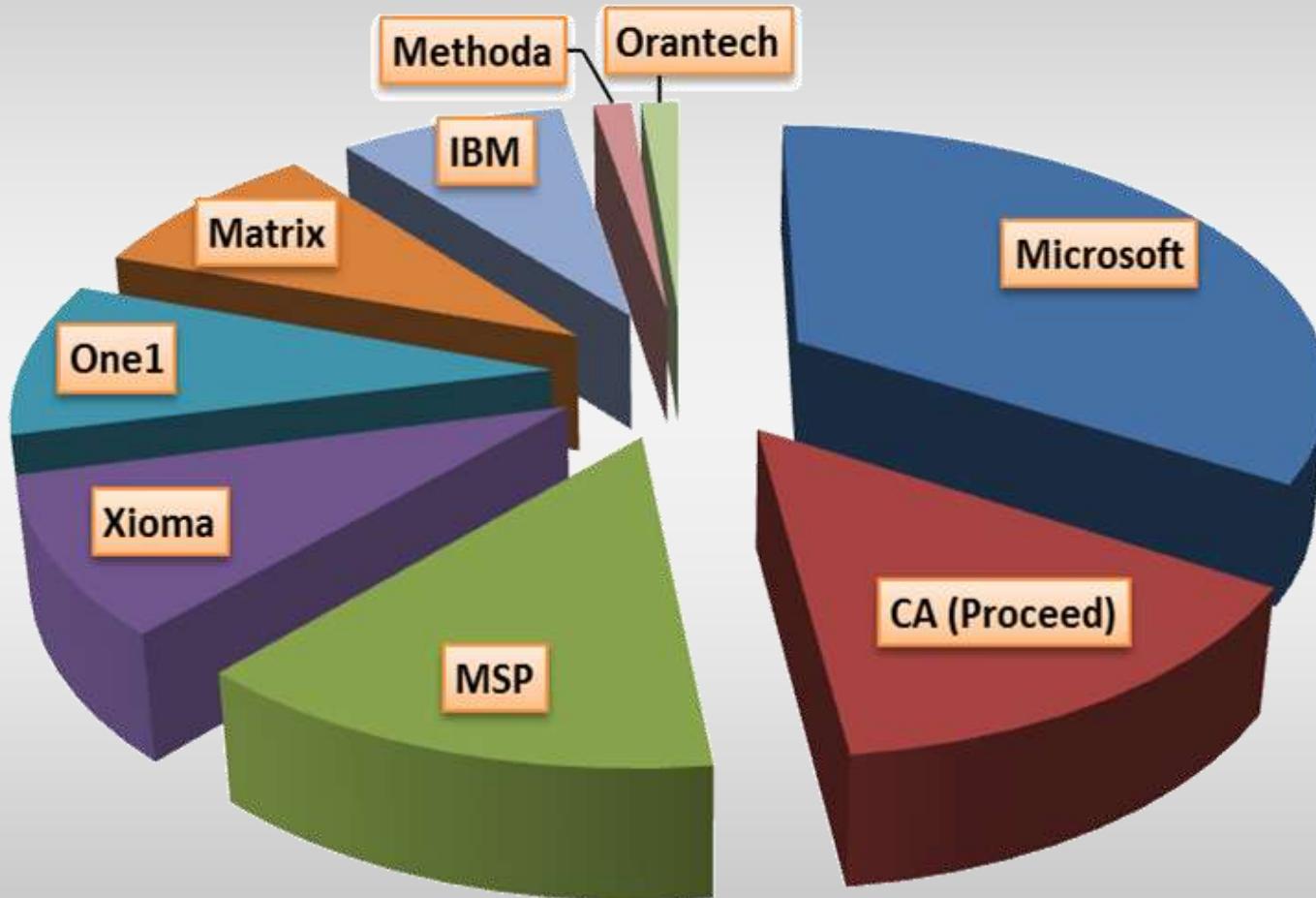
Software Development Tool Market

| 2011		2012		2013	
70.0	2.86%	72.0	11.11%	80.0	development & ALM tools
9.0	22.22%	11.0	36.36%	15.0	PLM tools
23.0	-8.70%	21.0	-4.76%	20.0	testing tools
12.0	25.00%	15.0	26.67%	19.0	mobile dev tools
5.0	20.00%	6.0	50.00%	9.0	LMS learning/hatmaa tools
119.0	5.04%	125.0	14.40%	143.0	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison Development Tool Software Market 2012

Development & ALM (includes testing tools)

Mobile Development Tools
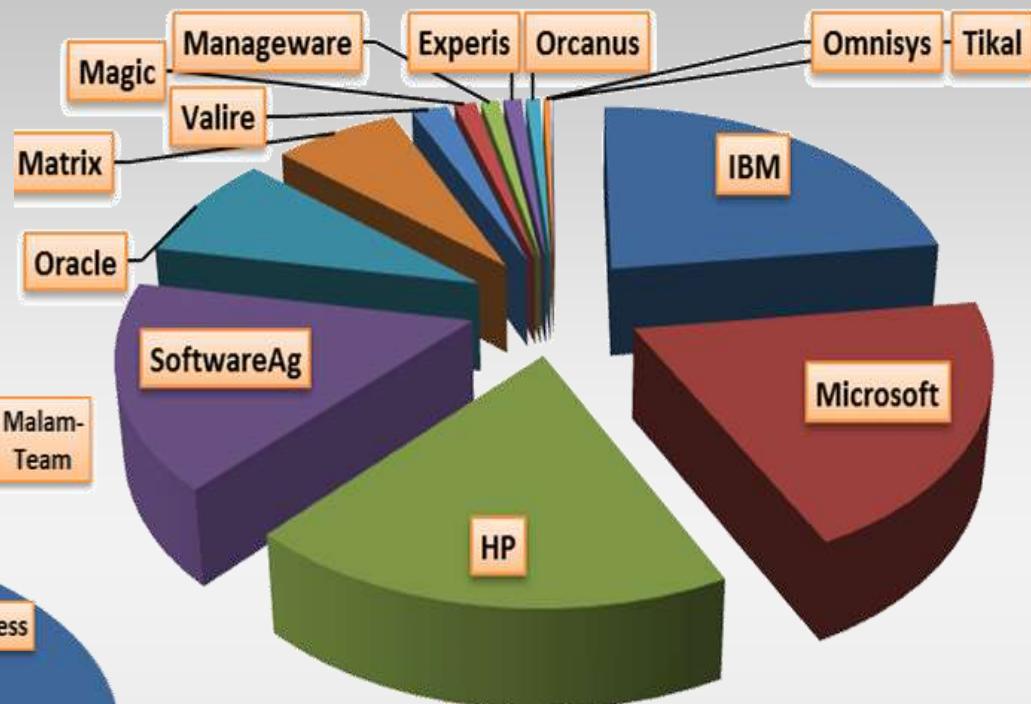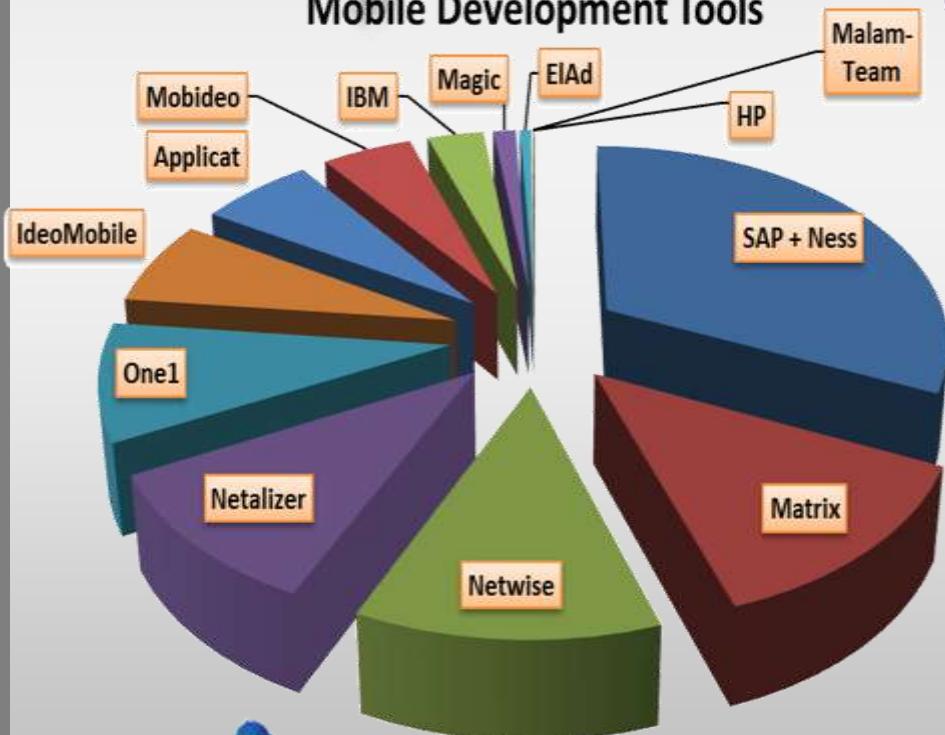
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LMS Learning Management

Matrix · Trainmate · Kineo · One1 · AKT · Britannica Knowledge Systems · Blossom · EKP · SAP · Oracle

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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IT Knowledge Integrators
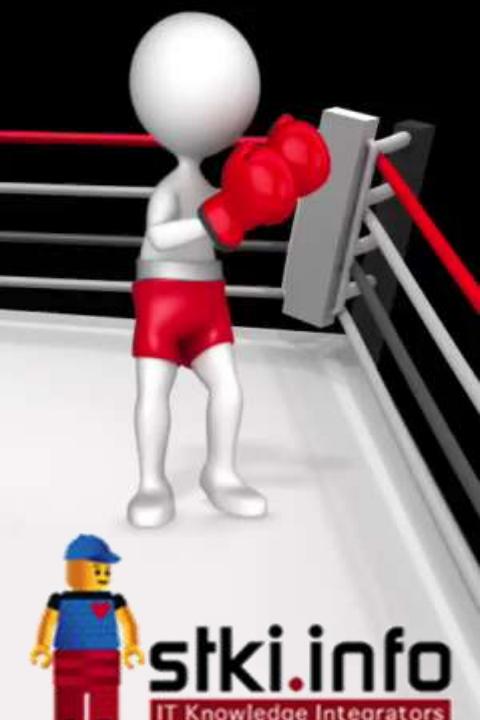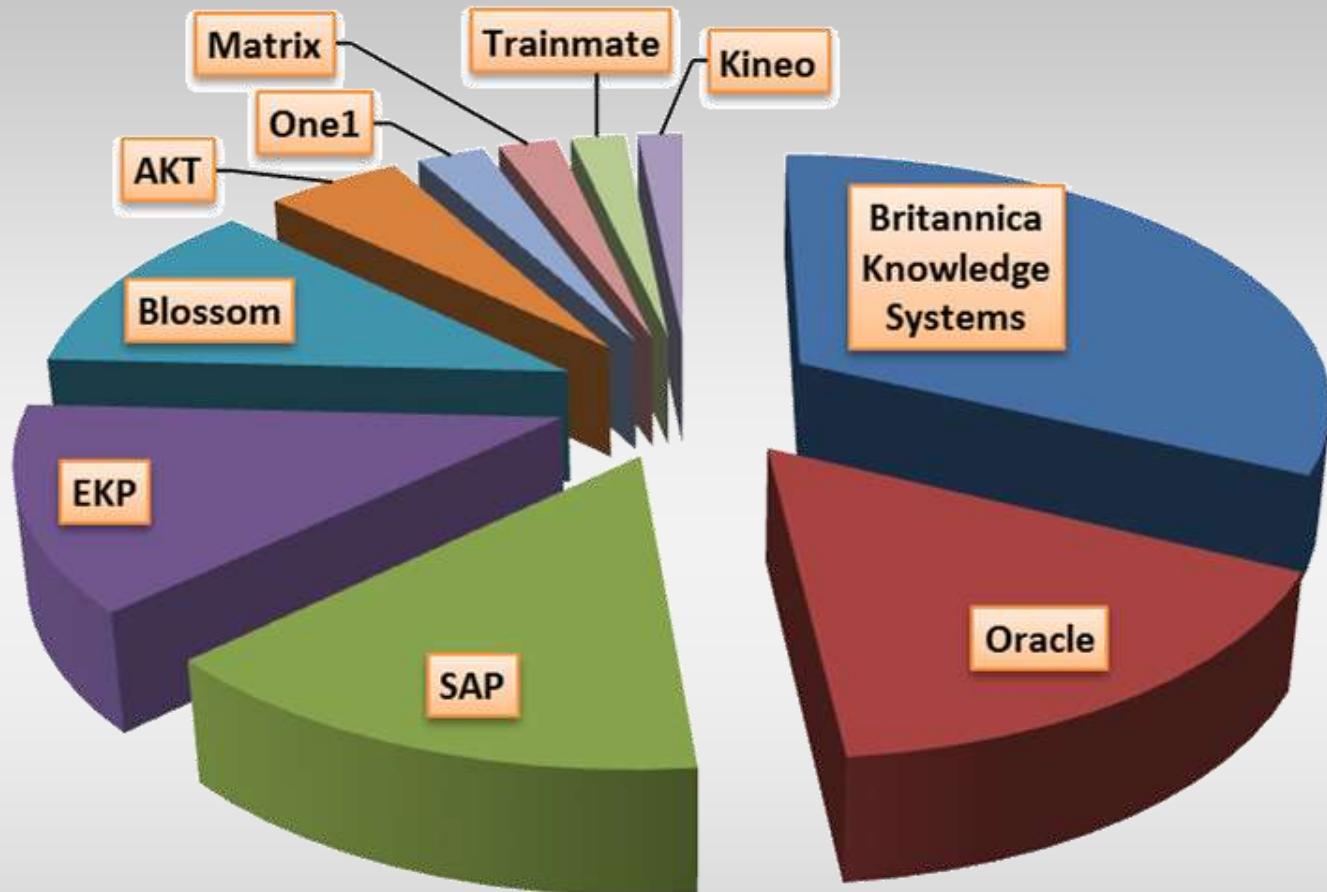
Software Categories 2

Information Management	Office Productivity (Microsoft Office, etc.)	תוכנות משרדיות (יומן, דוא"ל - MS Office)	כלי ניהול מידע תשתיתיים
	Enterprise portals, collaboration & social tools	פורטלים ארגוניים, כל שיתופיות ורשתות חברתיות ארגוניות	
	Analytics/ BI/DM/ EPM tools	כל אחזר BI, כריית נתונים, כל EPM ניהול ביצועי ארגון	
	information mgmt (MDM, ETL, EII etc)	ניהול נתונים (MDM, ETL, EII)	
	Document mgmt and search tools	ניהול מסמכים, מנועי חיפוש	
	Output mgmt tools	כל ניהול פלטים/הדפסות	
	multimedia mgmt tools (video, etc)	ניהול תכני מולטימדיה	
	other	אחר	
Business Applications	ERP	ERP	אפליקציות עסקיות
	CRM	CRM	
	BPM	BPM	
	WEB - social mng.	ניהול אתרים + מדיה חברתית	
	GIS & location based	אפליקציות מבוססות מקום GIS	
	Vertical (core business)	ניהול ליבת הארגון/ורטיקלים	
	other	אחר	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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IT Knowledge Integrators

Information Management Software Market

2011		2012		2013	
32.0	3.13%	33.0	6.06%	35.0	office productivity
62.0	4.84%	65.0	10.77%	72.0	portals, collaboration & social
47.0	6.38%	50.0	6.00%	53.0	document mgmt & search tools
10.0	20.00%	12.0	16.67%	14.0	multimedia mgmt tools (video and others)
12.0	16.67%	14.0	14.29%	16.0	output mgmt tools
100.0	12.00%	112.0	10.71%	124.0	Analytics/BI / MDM/ ETL tools
263.0	8.75%	286.0	9.79%	314.0	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

# Comparison Information Management Software Market

Enterprise Portals, Collaboration & Social Tools

Oracle
Bynet
SAP
IBM
ELAD
Top Group
Kwizcom
open Source
Microsoft

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Analytics/BI/DW/EPM Tools

Pie chart segments: Oracle, IBM, SAP, Microsoft, Mia Computers, I.E.Mittwoch, QlikView (Hilan), Panorama, Malam-Team, GStat, One1, Libi Tech, Matrix, Aman Computers

Side list: Ness, Yael Software, SIT, Pilat, Point of View, Taldor, BDO, Eternity

70

Document Mgmt. & Search Tools
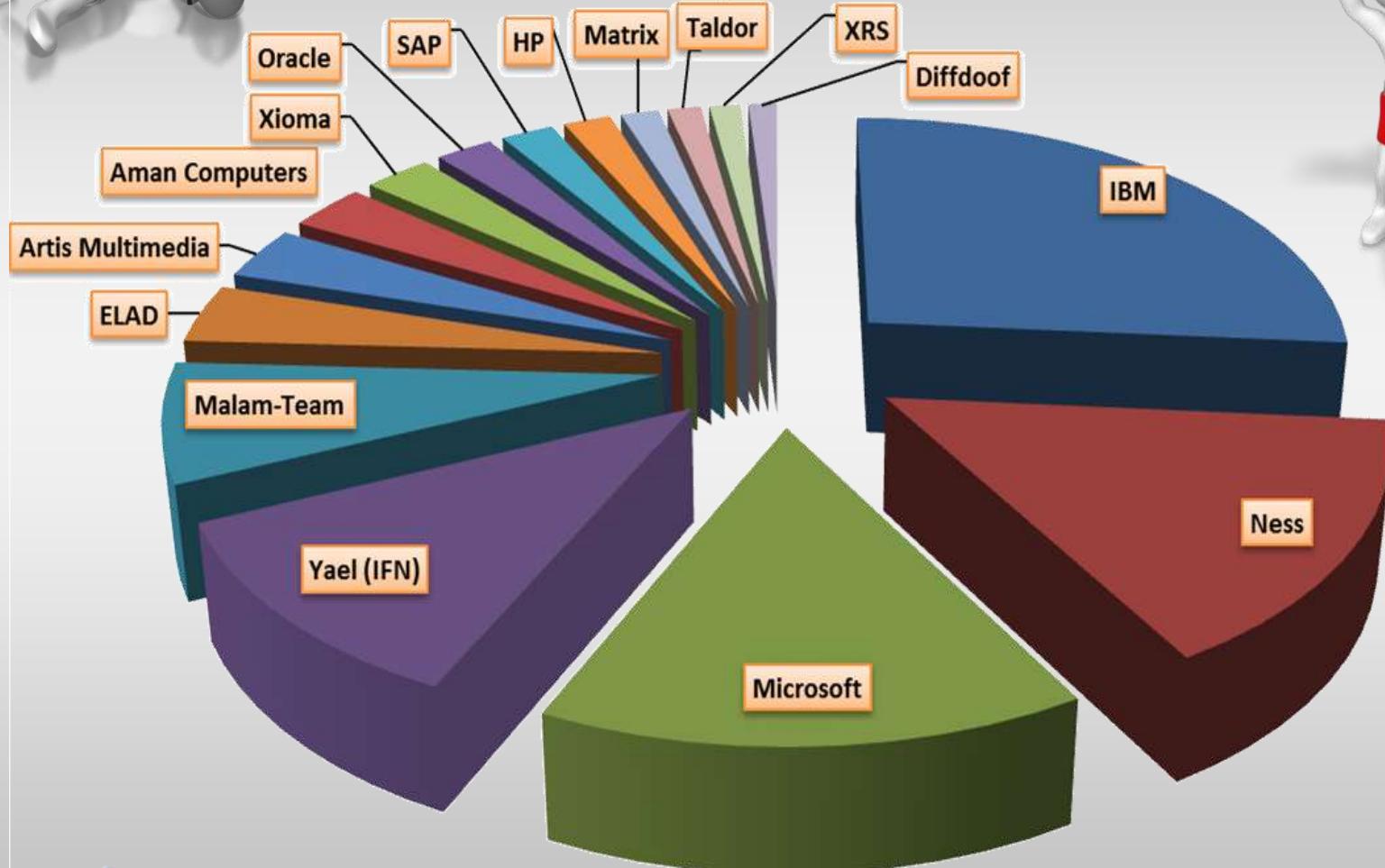
Business Application Software Market

2011		2012		2013	
54.0	3.70%	**56.0**	7.14%	**60.0**	core applications
110.0	3.64%	**114.0**	5.26%	**120.0**	ERP
55.0	5.45%	**58.0**	6.90%	**62.0**	CRM
15.0	13.33%	**17.0**	11.76%	**19.0**	BPM
8.0	15.00%	**9.2**	30.43%	**12.0**	WEB – Social mgmt
9.2	8.70%	**10.0**	20.00%	**12.0**	others
251.2	5.18%	**264.2**	7.87%	**285.0**	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

ERP Software

Vendors: Intentia Israel, Menahel4U, Xioma, I.E.Mittwoch, Taldor, Ziv systems, Pisga, Aviv, Almog, Microsoft, SIT, Kav marachot, Top Group, Aman Computers, One1, Eshbel, Matrix, Oracle, SAP

Packages that can be used "only" as SaaS are cataloged under SaaS category "only"

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73

Web & Social

Ewave
Kwizcom
Realcommerce
Netwise
Matrix
IBM
Microsoft

Packages that can be used "only" as SaaS are cataloged under SaaS category "only"

BPM

ProcessGene
ELAD
Matrix
Tiuv
SoftwareAg
IBM
PNMsoft
Oracle
One1
Yael Software
Malam-Team

CRM Software Packages

Matrix — CeMax
Kav marachot
Yael Software
One1
Oracle
Taldor
Microsoft
SAP

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Israeli Vendor Analysis

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Value Added Services Market : Tiers
2012 Israel Value Added Services Market

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Israel: Value Added Services Market 2011-2013

2011		2012		2013
2,997.0	4.07%	3,119.0	11.61%	3,481.0

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Top Value Added Services Vendors
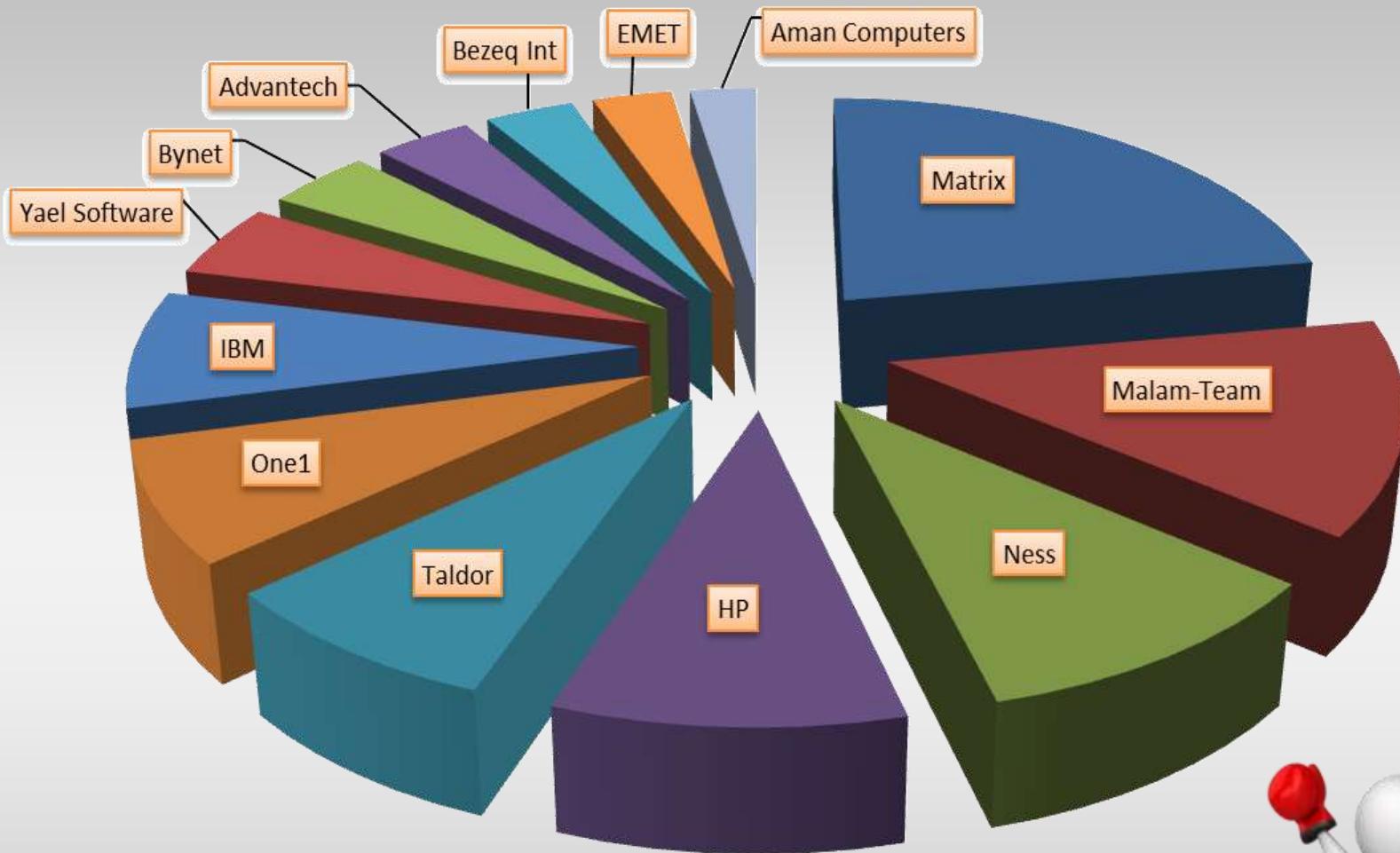
EMET

Bezeq Int

Aman Computers

Advantech

Bynet

Yael Software

IBM

One1

Matrix

Malam-Team

Ness

Taldor

HP

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Value Added Services Categories 1

IT Consulting & Analysis	IT Consulting	ייעוץ IT	ייעוץ בתחום IT (לא ביצוע בפועל - מכרזים, וכד')
Hardware Maintenance	Hardware Maintenance	תחזוקת חומרה	**תחזוקת חומרה**
Infrastructure Projects	Consolidation/virtualization/ hardware integration projects	קונסולידציה/ וירטואליזציה/פרוייקטי תשתיות חומרה	**פרוייקטי תשתיות**
	software infra integration projects	תשתיות תוכנה	
	Data Center Environment	אולם מחשב	
	other	אחר	
Project Services	Project Management Office	ניהול פרויקט - PMO	**שירותים פרויקטאליים (באחריות הספק)**
	Q/A & Testing	בדיקות, QA	
	Rollout/Hatmaa	הטמעה	
	other	אחר	

IT Consulting Market

2011		2012		2013	
82.0	4.88%	86.0	10.47%	95.0	IT Consulting/ Analysts
82.0	4.88%	86.0	10.47%	95.0	total

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Infrastructure Services Market
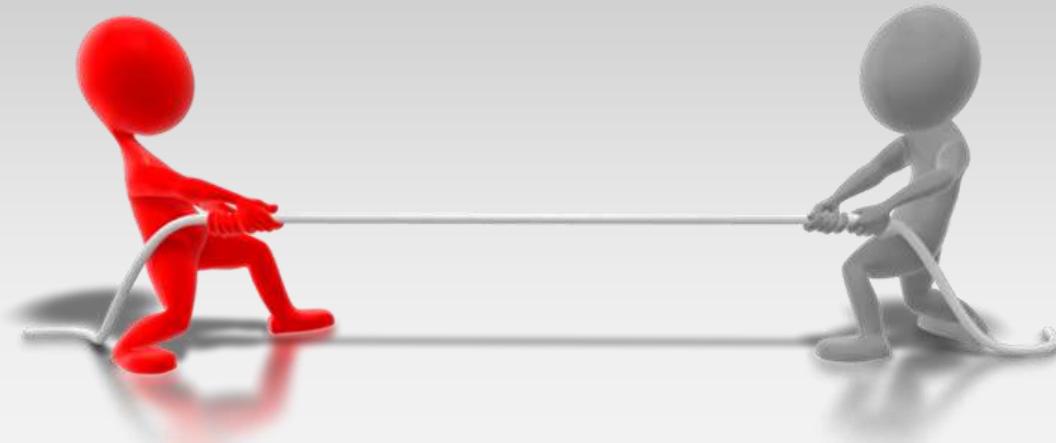
| 2011		2012		2013	
150.0	-2.67%	146.0	-2.74%	142.0	Hardware Maintenance
45.0	11.11%	50.0	20.00%	60.0	Data Center Environment
90.0	3.33%	93.0	9.68%	102.0	software & application integration & ALM
145.0	4.83%	152.0	8.55%	165.0	Consolidation/virtualization/hardware integration projects
430.0	2.56%	441.0	6.35%	469.0	total

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

We rank VENDORS by REVENUE and CLIENT MINDSHARE

Hardware Maintenance

GlassHouse · One1 · Matrix · TripleC · Ankor (Hilan) · Alexander Schneider · Yael Software · Taldor · EMET · Bynet · I.E.Mittwoch · Malam-Team · IBM · HP

Consolidation/virtualization/networking/hwre integration & monitoring

Partner/012
AVCS
Netvision/ Cellcom
NGSoft
Comm IT
Aman Computers
We (Hilan)
Headon
Magalcom
Minicom
SQLink
Microsoft
One1
BenefIT
HDS
Yside
TripleC
Neway
2Bsecure
Ankor (Hilan)
doITwise

Dor –IT
HMS
Liacom
techmind
Simplementia
penguinIT
ELAD
Ardom
openstorage
SteerU
elk-group
Centerity
ITassist
Afek Systems

Pie chart labels: Malam-Team, Bynet, EMET, Cisco, Bezeq Int, Matrix, HP, Taldor, EMC, I.E.Mittwoch, GlassHouse, IBM, NetApp, Avcom, CA

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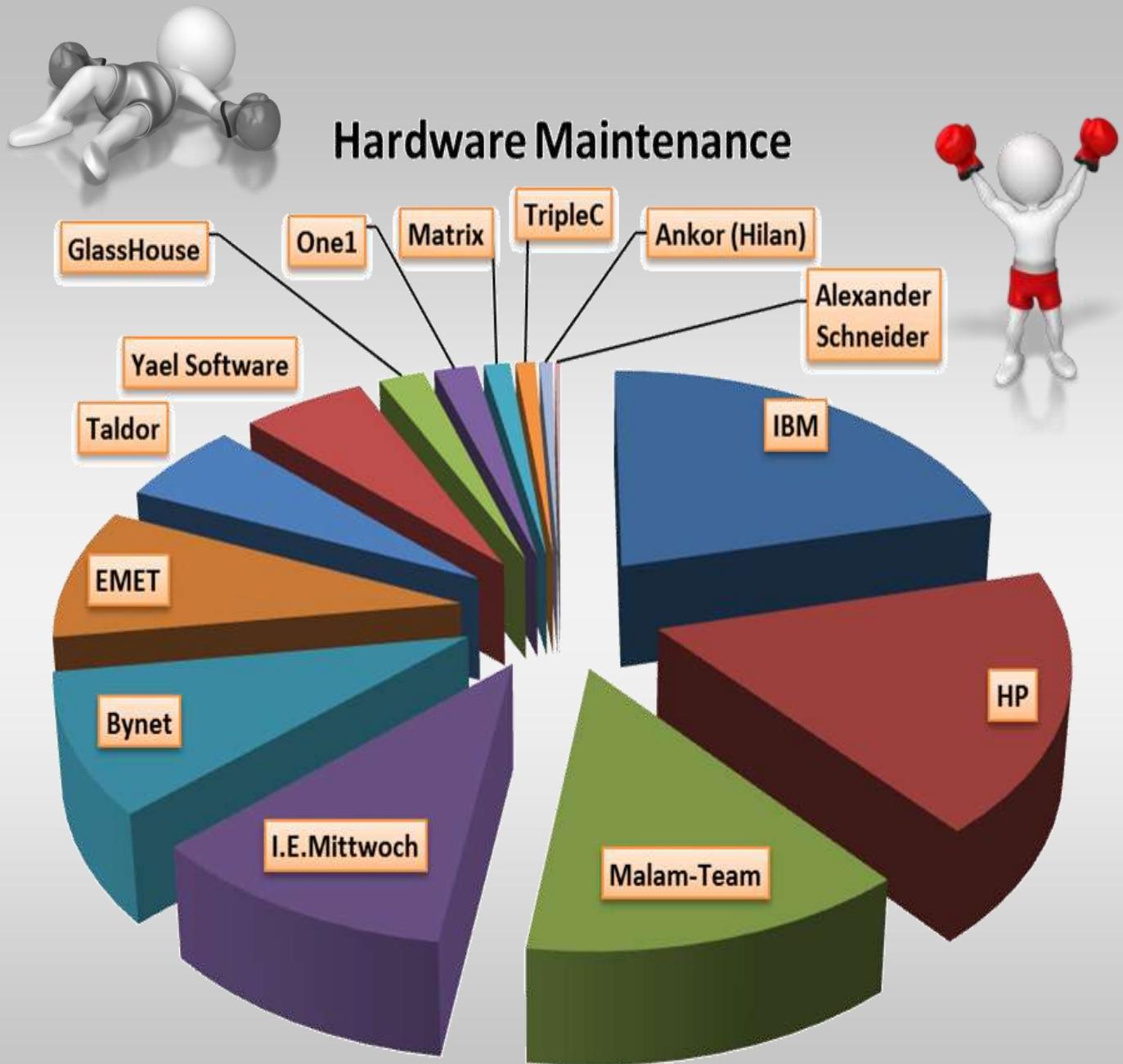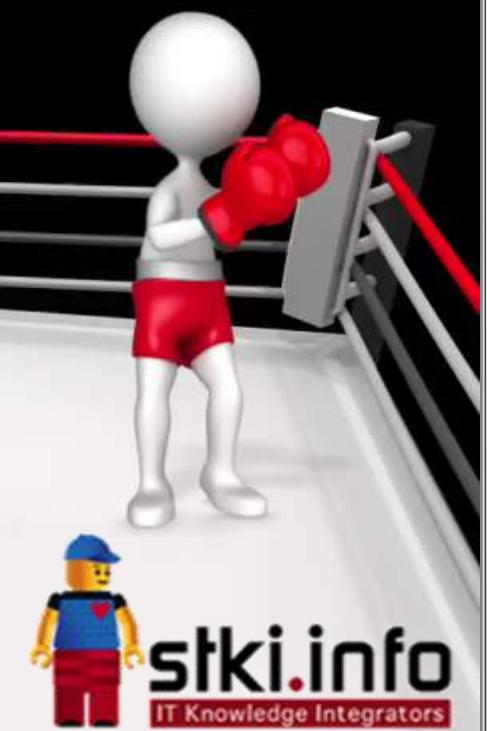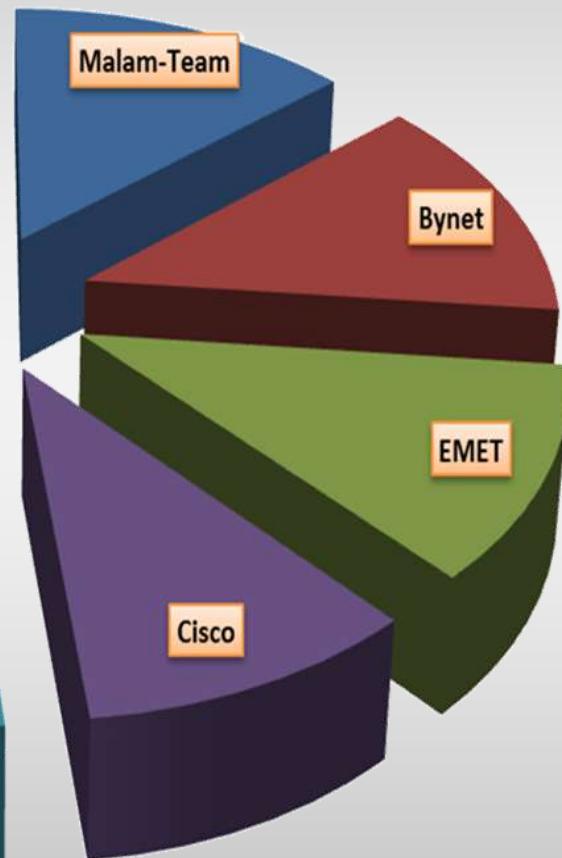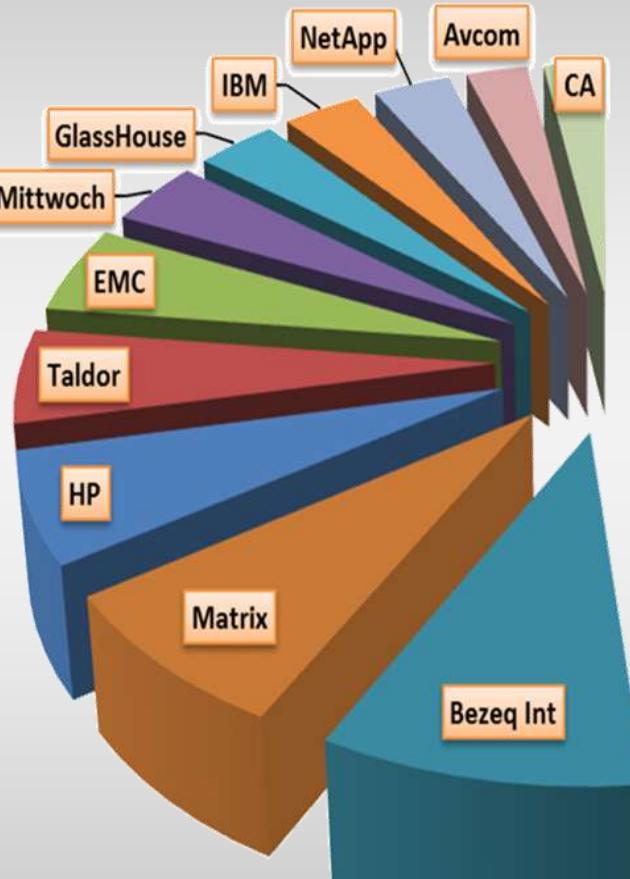
Comparison Infrastructure Services Market 2 2012

Data Center & DRP Projects

- GlassHouse
- HMS
- Aman Computers
- Matrix
- One1
- Bunkersec
- Magalcom
- Alexander Schneider
- IBM
- Girit
- HP
- Malam-Team
- Bynet

Software Infrastructure, SOA & ALM Integration

- MindU
- Eternity
- Afek Systems
- Taldor
- Calanit Carmon
- Advantech
- Bynet
- Magic
- Ardom
- BenefIT
- Netwise
- ELAD
- Matrix
- Manageware
- Veracity
- IBM
- EMET
- Yael Software
- Tikal
- ticomsoft
- Oracle
- One1
- Sysnet
- Midlink
- Experis
- Microsoft
- Aman Computers

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83

Project Services Market

2011		2012		2013	
90.0	5.56%	95.0	7.37%	102.0	Q/A & Testing
52.0	5.77%	55.0	9.09%	60.0	Roll-out Hatmaa
20.0	10.00%	22.0	9.09%	24.0	Project Management Office
162.0	6.17%	172.0	8.14%	186.0	total

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Comparison Project Services Market 2012
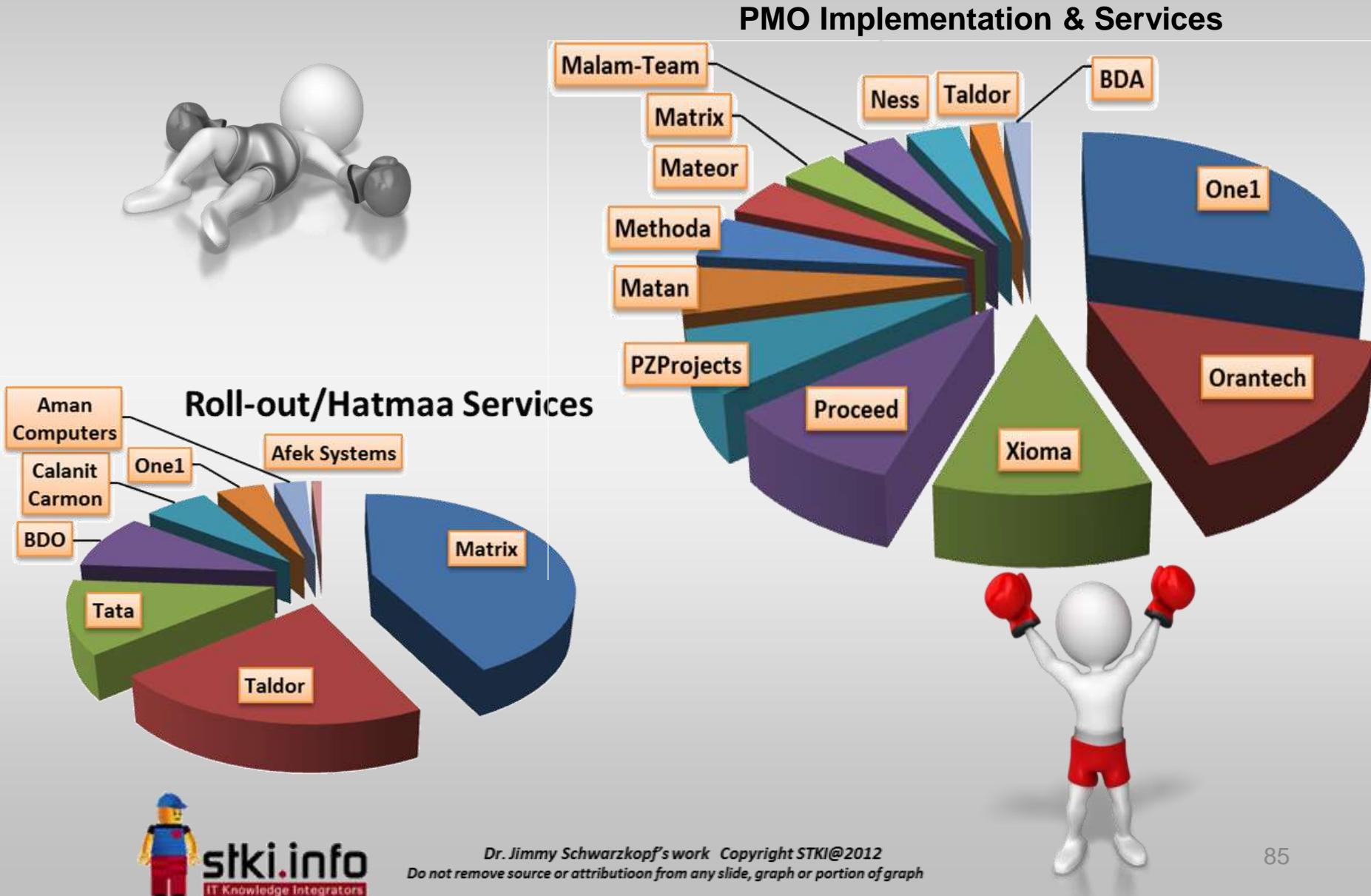

PMO Implementation & Services

Malam-Team
Matrix
Mateor
Methoda
Matan
PZProjects
Ness
Taldor
BDA
One1
Orantech
Xioma
Proceed

Roll-out/Hatmaa Services

Aman Computers
Calanit Carmon
One1
BDO
Afek Systems
Tata
Matrix
Taldor

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Q/A Testing Services

Aman Computers
Realcommerce
LogOn
Top Group
ELAD
Netwise
Methoda
ALD
NGSoft
SQLink
Bynet
Taldor
Testpro
Experis
Qualitest
One1
Sysnet
Malam-Team
Matrix
Ness
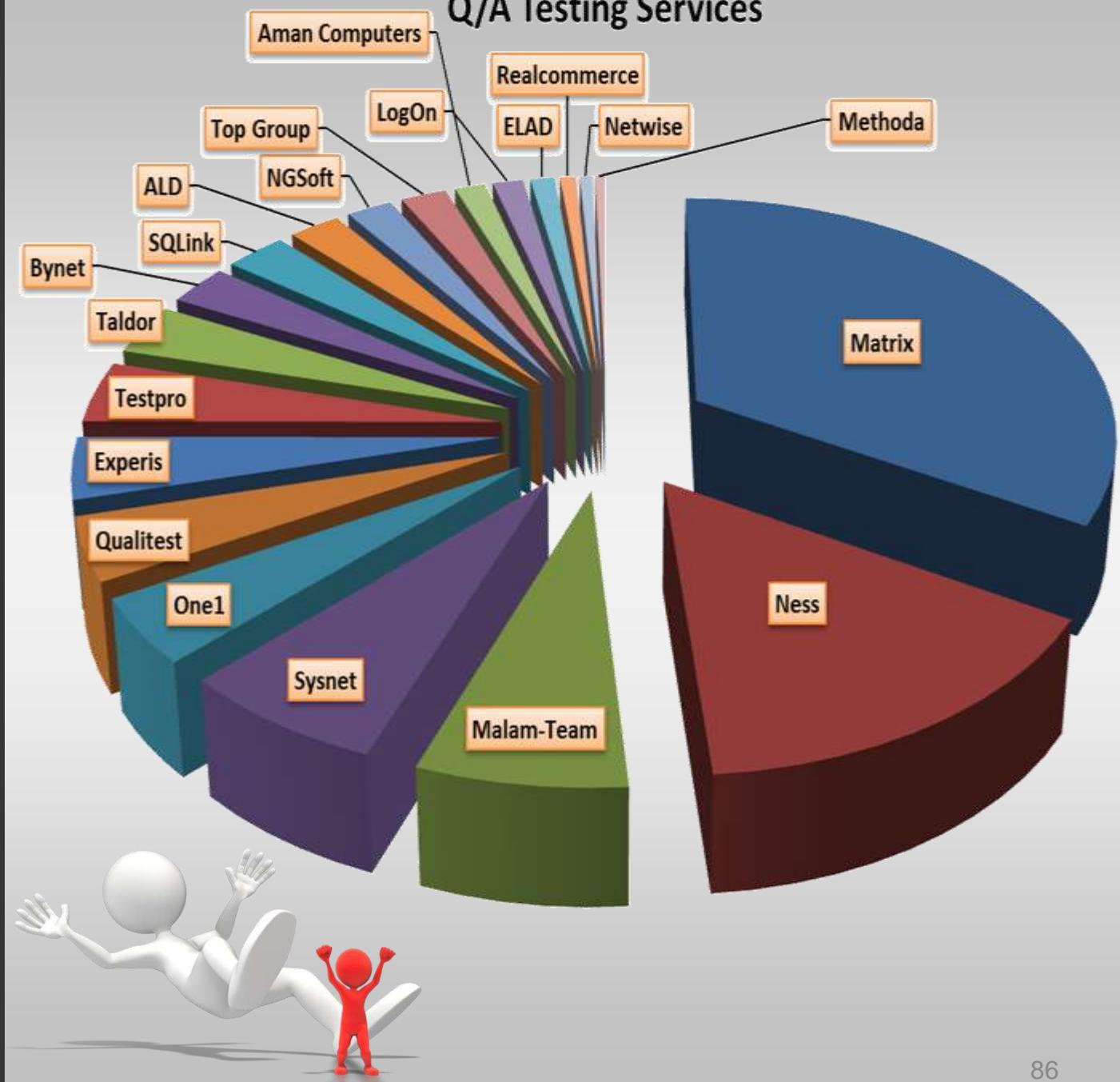
Value Added Services Categories 2

Development	ERP	ERP	**שירותי פיתוח**
	CRM	CRM	
	knowledge management (ECM, SP, BPM, Portals)	ניהול ידע (תוכן, SP, פורטלים, BPM)	
	.NET based without internet	דוט נט ללא אינטרנט ומובייל	
	java based without internet	Java ללא אינטרנט ומובייל	
	Web/internet	אתרי אינטרנט	
	Social and eBizz applications	מדיה חברתית/ ביזנס מקוון	
	Mobile, MDM	פיתוח מובייל וניהול מכשירי מובייל	
	User Interface Design	עיצוב ממשק משתמש	
	BI/DW/EPM/Data Management	מחסני נתונים, BI, ניהול ביצועי הארגון, ניהול נתונים	
	application integration	קישוריות SOA	
	mainframe/AS400	mainframe\AS400	
	core vertical development	פיתוח אפליקציות ליבה/ ורטיקליות	
	Printing	הדפסה	
	Migrations	הסבות של מערכות	
	Archiving	אירכוב	
	other	אחר	
Talent Skill Mgmt	IT Training inhouse	הדרכה באתר הלקוח	**הדרכת IT**
	IT Training at Vendor	הדרכה באתר הספק	
VoIP/Call Centers	VoIP/telephony	טלפוניה/ VOIP	**VoIP/Call Centers**
	VoIP/call center	call center \VOIP	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Software Development Services Market

2011		2012		2013	
150.0	6.67%	160.0	13.75%	182.0	ERP
45.0	4.44%	47.0	10.64%	52.0	CRM
89.0	3.37%	92.0	13.04%	104.0	KM,ECM,SP,BPM,others
85.0	7.06%	91.0	20.88%	110.0	.NET (XRM) based without internet
37.0	5.41%	39.0	5.13%	41.0	Java based without internet
50.0	6.00%	53.0	22.64%	65.0	Web/internet
15.0	33.33%	20.0	35.00%	27.0	social & e-biz
25.0	24.00%	31.0	29.03%	40.0	Mobile/MDM
47.0	-14.89%	40.0	-12.50%	35.0	Legacies/mainframe
95.0	10.53%	105.0	23.81%	130.0	BI/DW/EPM/Data Management
58.0	3.45%	60.0	20.00%	72.0	core/vertical
20.0	5.00%	21.0	19.05%	25.0	output mgmt/print mgmt
18.0	11.11%	20.0	45.00%	29.0	User Interface Design
25.0	8.00%	27.0	18.52%	32.0	Migrations/ others
759.0	6.19%	806.0	17.12%	944.0	totals

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Comparison
Software Development Market 2012

ERP based projects

Intentia Israel
Prodware
Matrix
Meidatech
Yael Software
Taldor
Malam-Team
IBM
SIT
Tata
HMS
One1
Ness
HP
Advantech
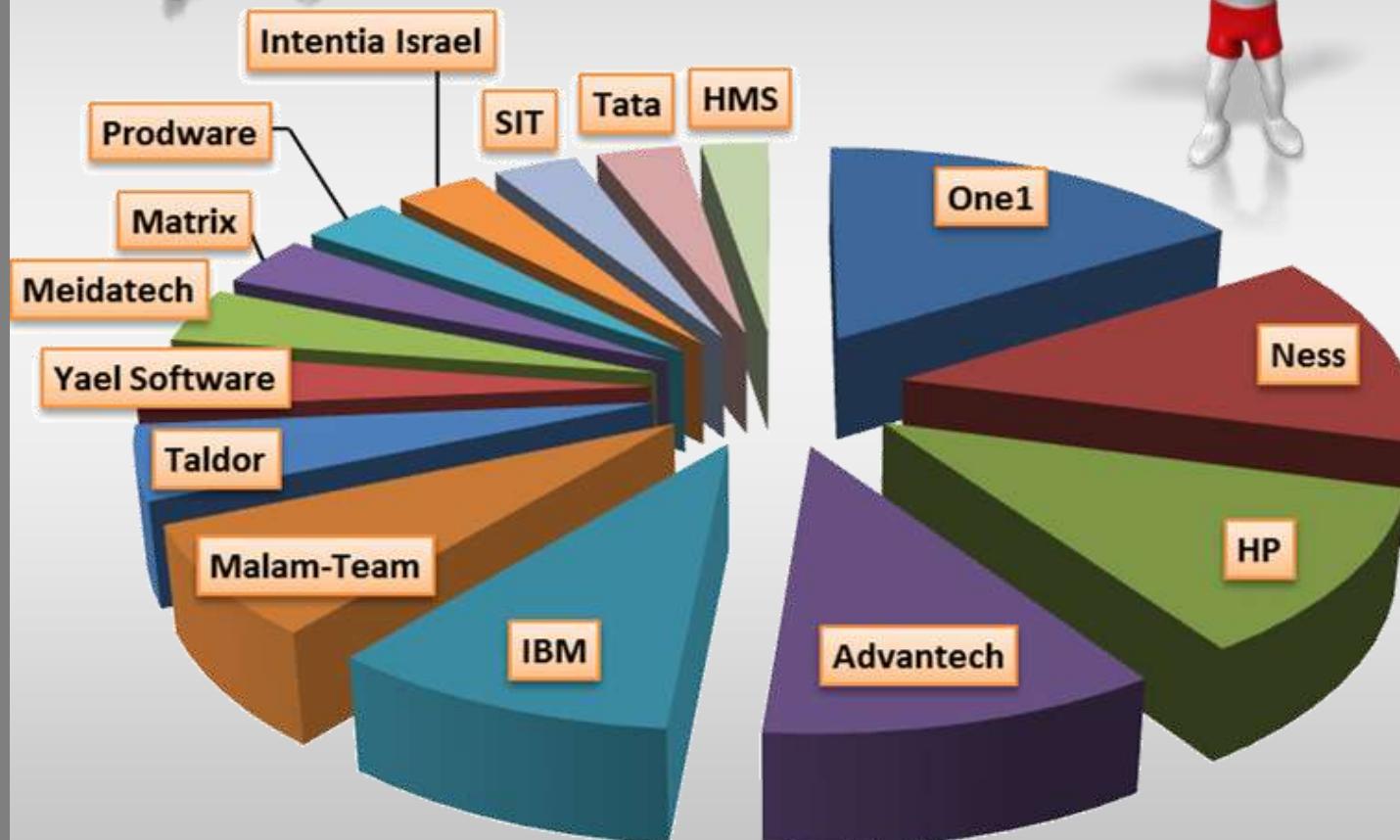
| FBC |
| Almog |
| Aman Computers |
| Eshbel |
| Kav marachot |
| Menahel4U |
| Raan |
| Rels |
| Todan |
| Unitask |
| Ziv systems |
| Maxoft |
| Xioma |
| Axperts |
| Accenture |
| C.BIT |
| ELAD |
| Pilat |
| Aviv |
| Afek Systems |
| Pisga |
| Anagal |
| Tulip |

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Comparison
Software Development Market 2 2012

CRM Projects

Labels on pie chart: Aman Computers, Blat-Lapidot, Pilat, Sensecom, SIT, Netwise, Prodware, Tata, Advantech, Yael Software, HP, ELAD, IBM, One1, Ness, Taldor, Matrix, Malam-Team

| Meidatech |
| --- |
| Kav marachot |
| Maxoft |
| Raan |
| Anagal |
| CEMax |
| Eshbel |
| Unitask |
| IT Navigator |
| ManofIT |
| Pisga |
| IntegrITy |

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Comparison
Software Development Market 3 2012

Knowledge Management (ECM, SP, BPM, Portals)
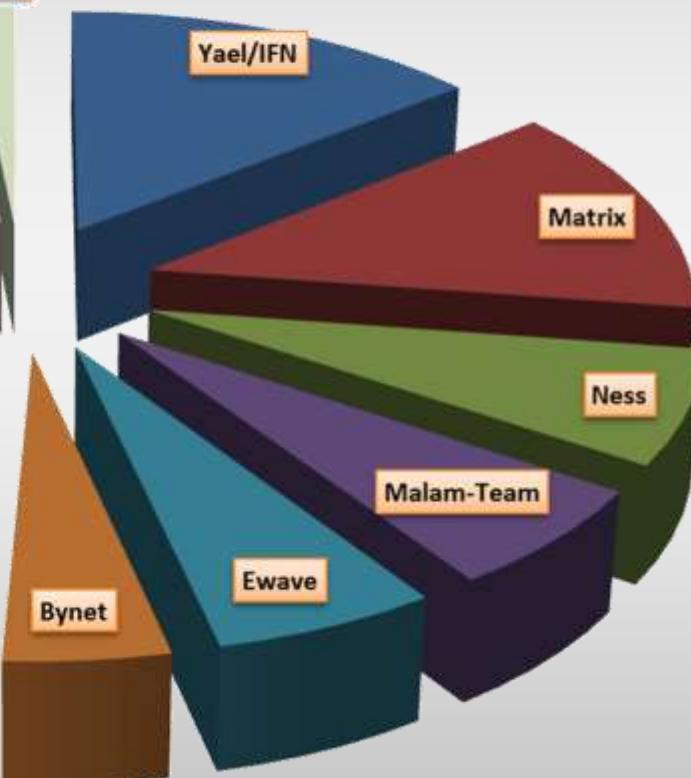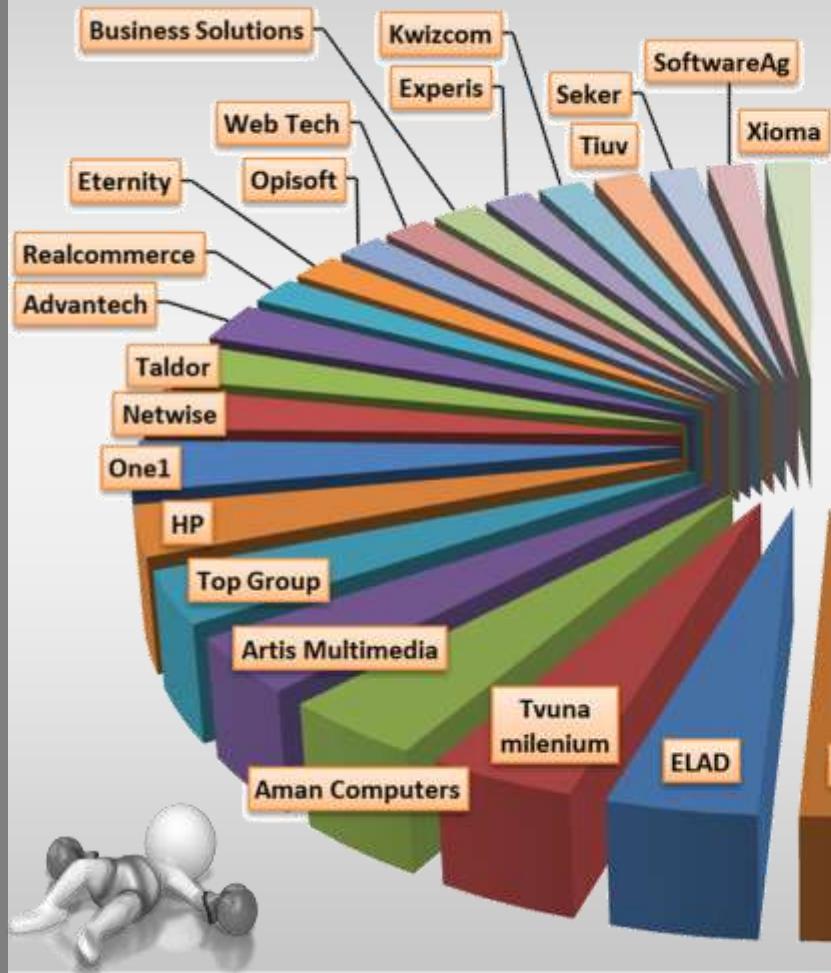
PNMsoft
Hevra Le Automazia
Moding
Know-edge
ProcessGene
C-soft
Matan
Methoda
IntegrITy
BluePhoenix

.NET (XRM) without Internet

Pie chart segments labeled:
- Malam-Team
- Matrix
- Ness
- Advantech
- Taldor
- One1
- HP
- Yael Software
- IBM
- SQLink
- Sysnet
- ELAD
- Aman Computers
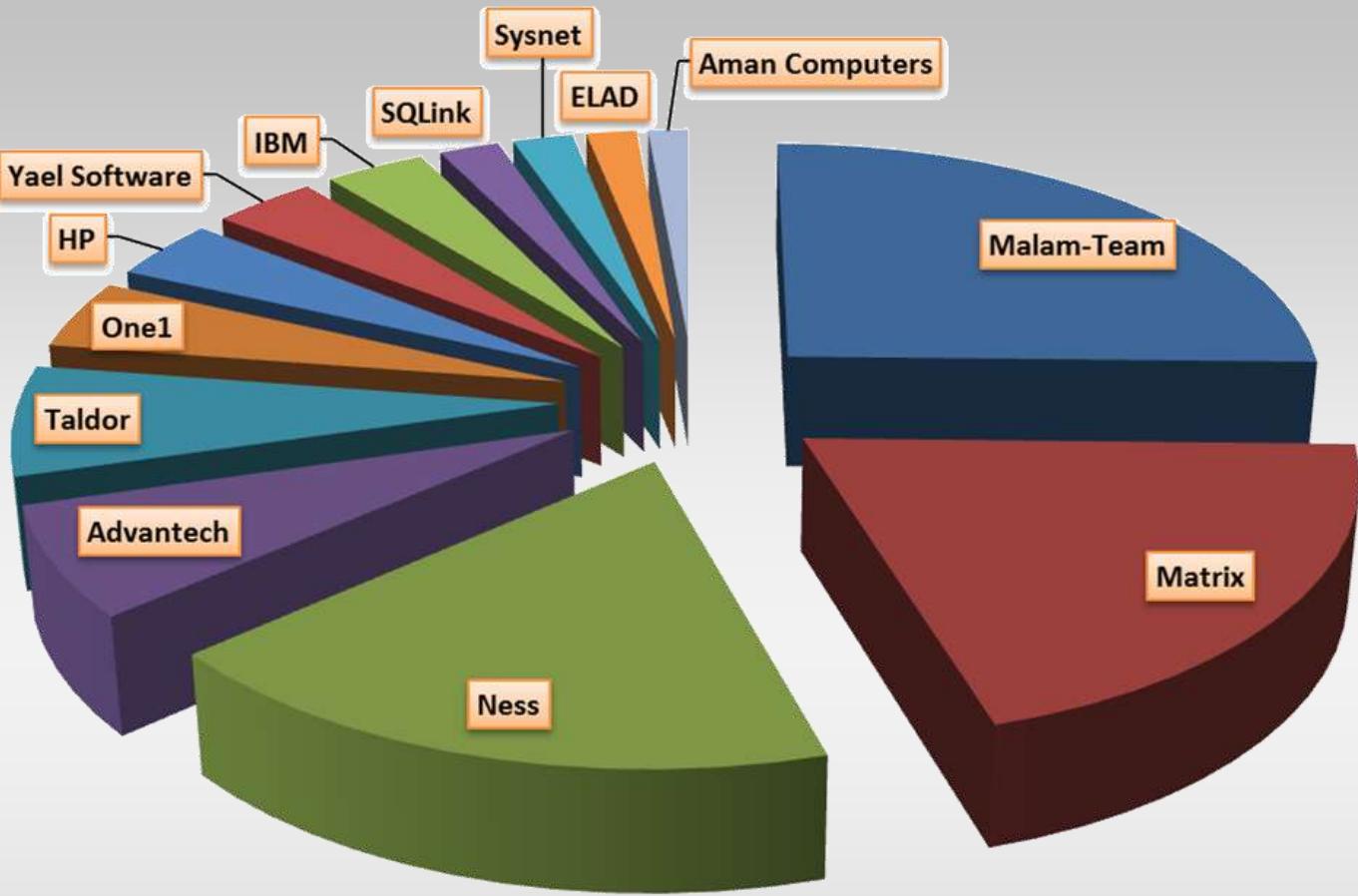
| I.E.Mittwoch |
|---|
| Tvuna milenium |
| Netwise |
| Afek Systems |
| Experis |
| Hevra Le Automazia |
| Almog |
| SIT |

Top Group
Bynet
DBbest
Renaissance
Matan
Calanit Carmon

Comparison
Software Development Market 4 2012

JAVA (without internet) Development

- Yael Software
- Experis
- Web Tech
- Calanit Carmon
- Sysnet
- Taldor
- ELAD
- SQLink
- Matrix
- I.E.Mittwoch
- HP
- EMET
- Aman Computers
- Malam-Team
- Tata
- Advantech
- LogOn
- IBM
- One1

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Comparison
Software Development Market 5 2012

Web/Internet Development

Aman Computers · Experis · Hevra Le Automazia · ELAD · Afek Systems · Artis · Advantech · Calanit Carmon · One1 · Bynet · Yael Software · HP · Consist · Taldor · Realcommerce · Netwise · Ewave · Matrix
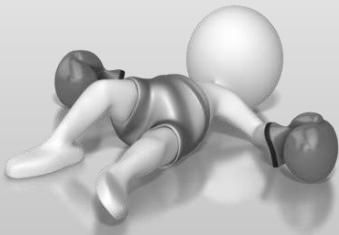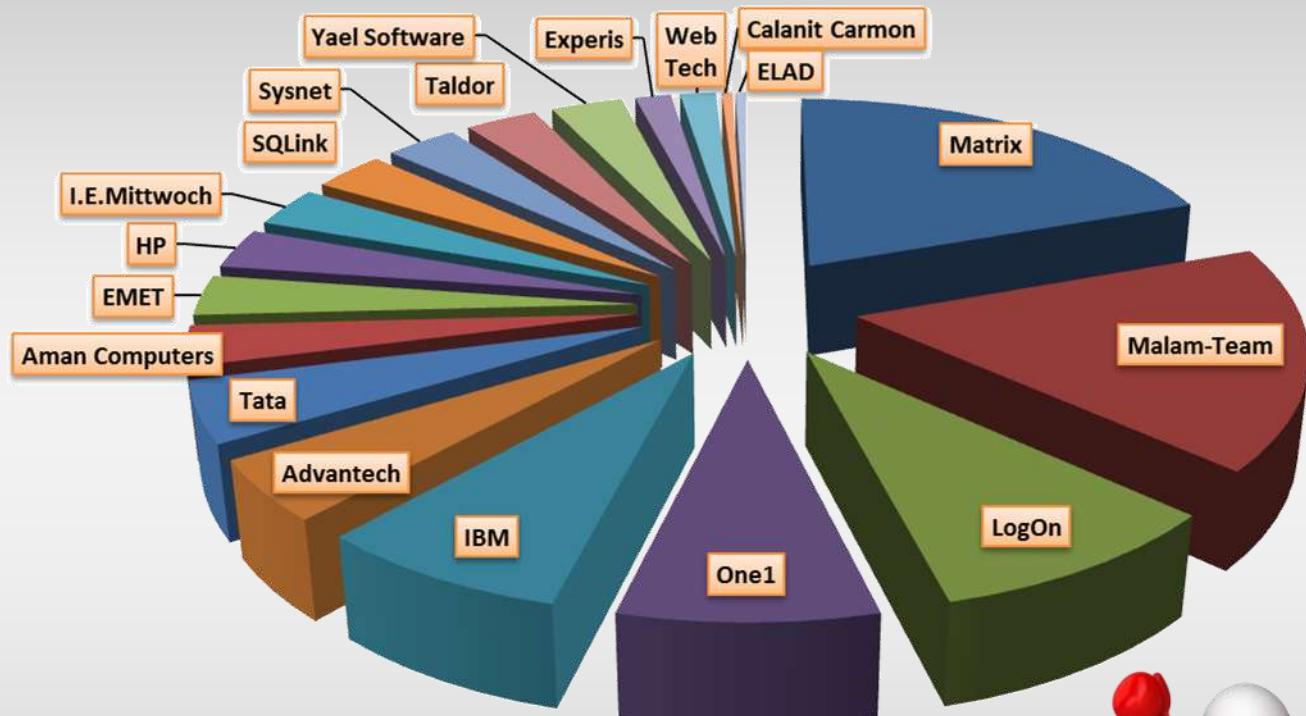
Social & e-bizz Applications

Aman Computers · Experis · Deloitte · Realcommerce · Ewave · Ness · Netwise · Matrix
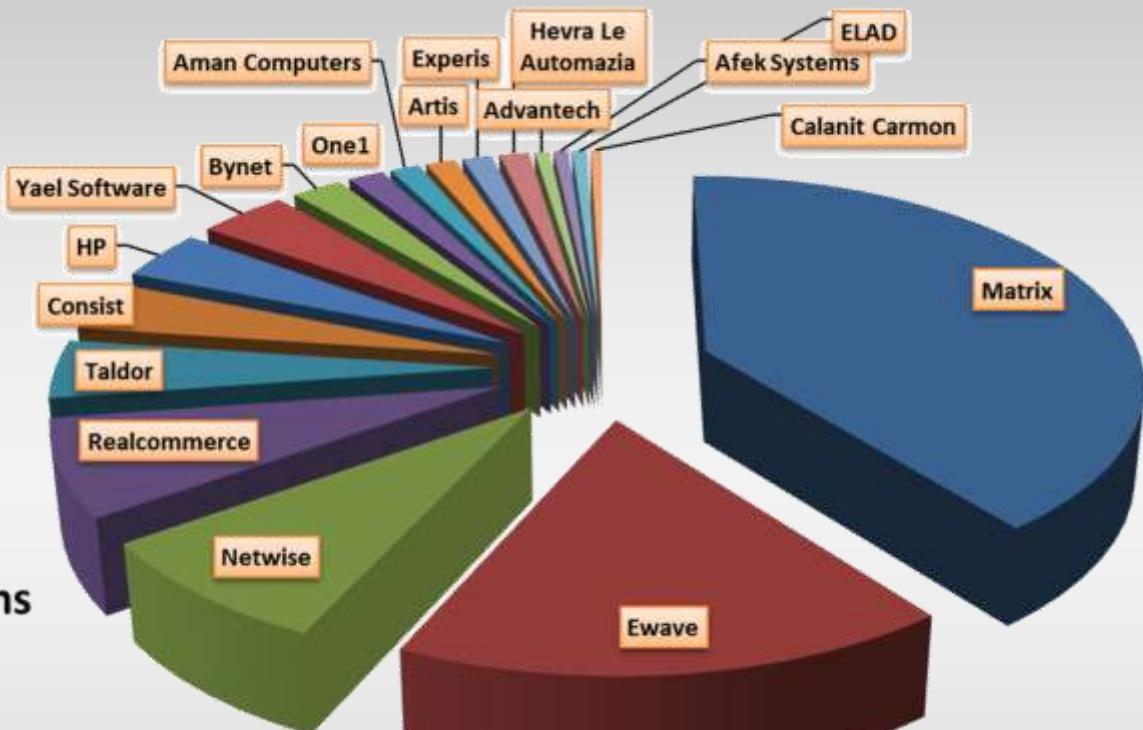
We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

Mobile Development

- Accenture
- Aman Computers
- Ewave
- ELAD
- Netalizer
- HP
- Moblin
- Experis
- Taldor
- Applicate
- Mobideo
- One1
- Realcommerce
- IdeoMobile
- NGSoft
- Netwise
- Ness
- Matrix
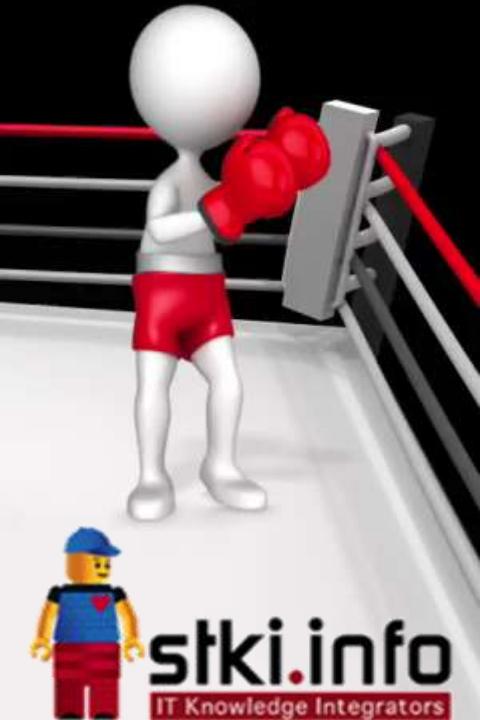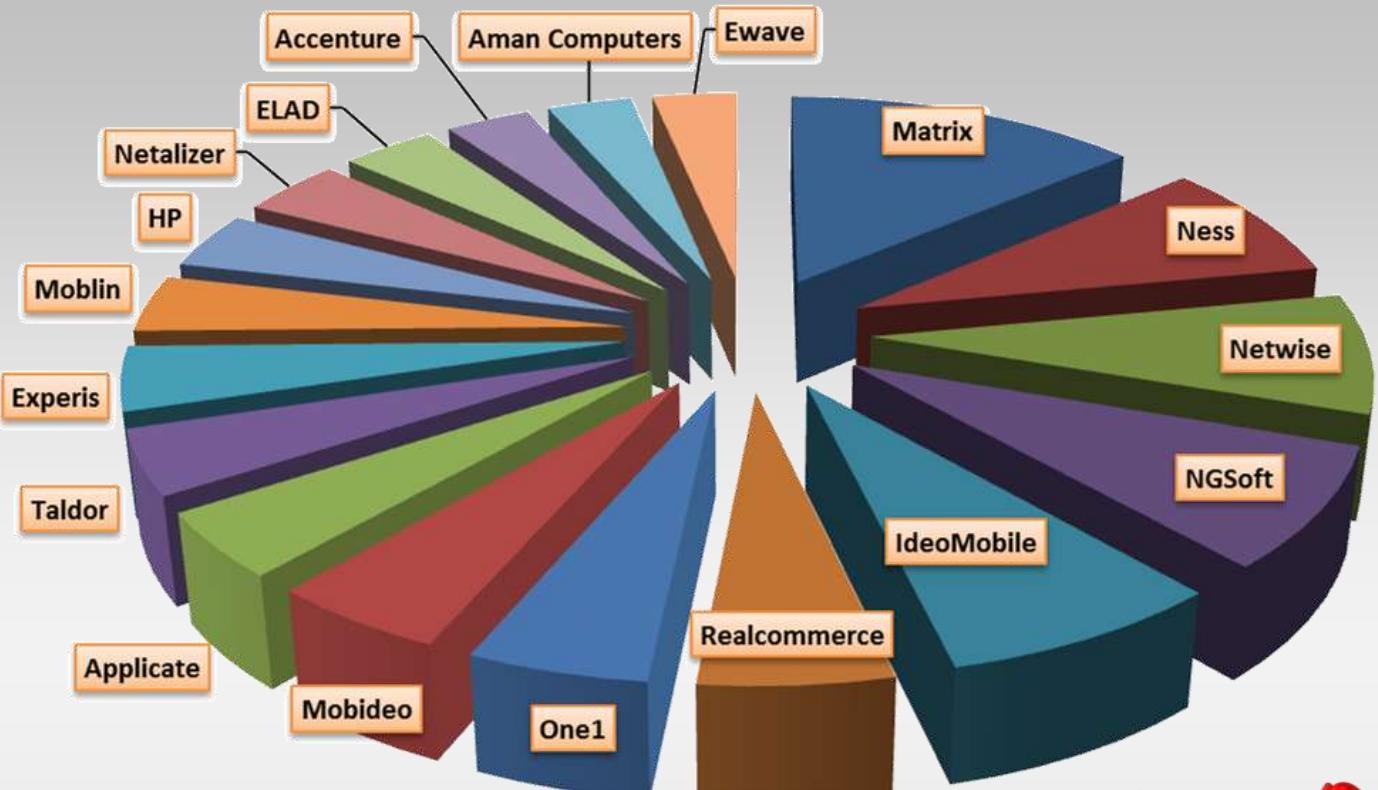
User Interface Projects

- NETCRAFT
- Artis
- Ewave
- Yael Software
- TZUR
- Ness
- Matrix
- UI
- Aman Computers
- Netwise

95
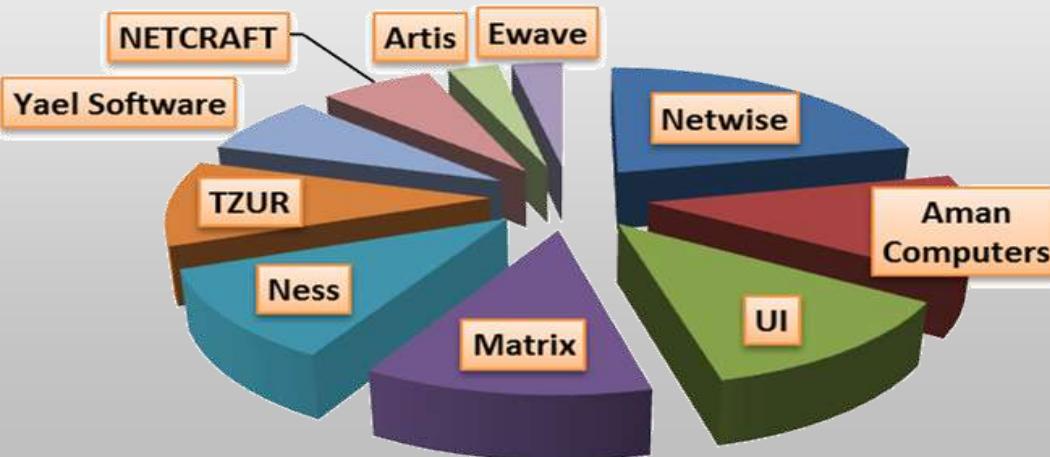
Comparison
Software Development Market 6 2012

BI/DW/EPM/Data Management

Labels on pie chart: Aman Computers, Enix, Hevra Le Automazia, HMS, Point of View, IBM, B&D, One1, Consist, Malam-Team, Libi Tech, I.E.Mittwoch, HP, Mia Computers, VisionBI, QlikView (Hilan), Eternity, Gstat, Opisoft, Matrix, Ness
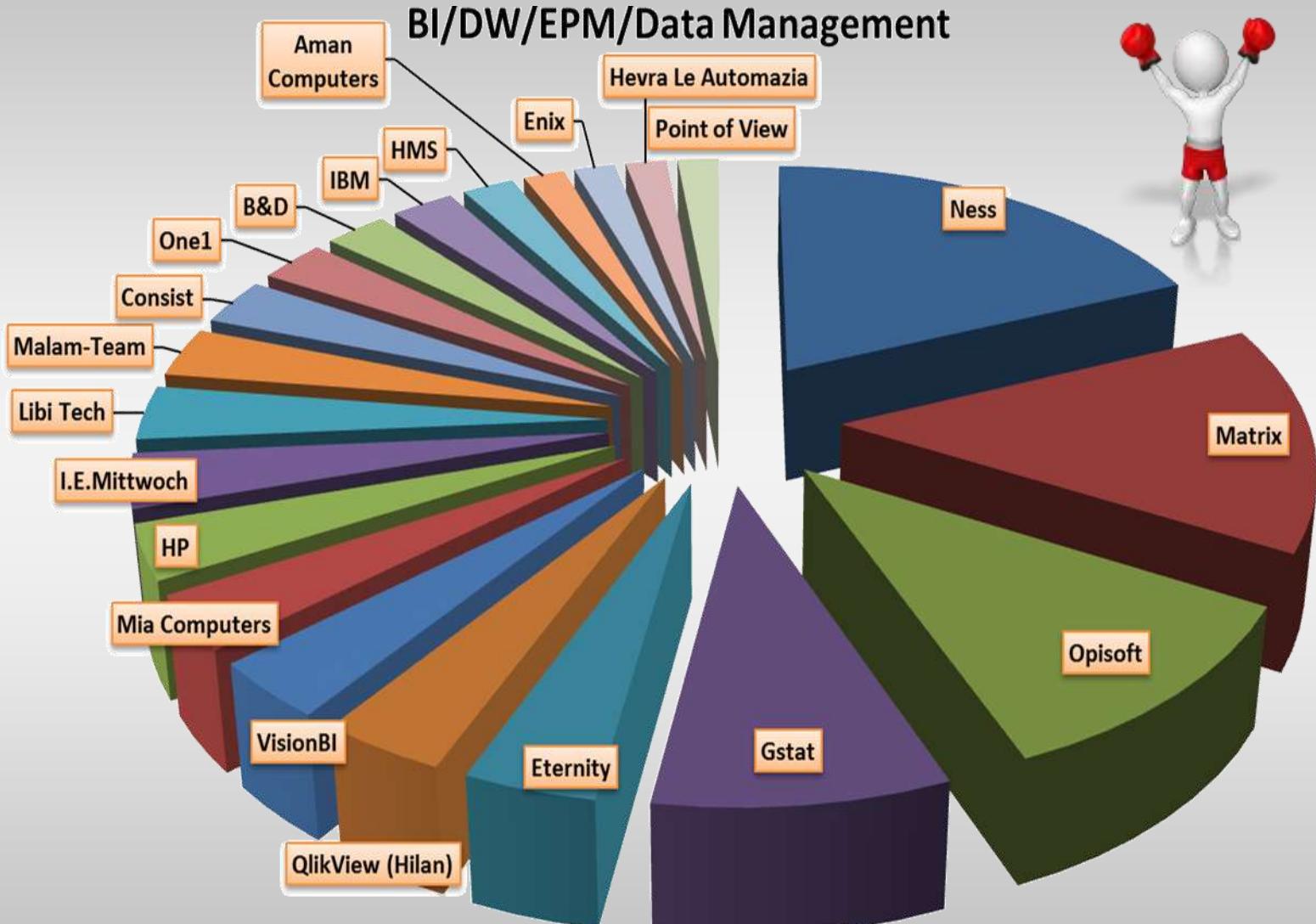
Side list: BIconix, Citrine BI, Data Cube, Active View, Yael Software, Experis, Normative, Taldor, BICS, Bynet, Matan, SQLink, SIT, Anagal, SkyWin, Xioma, Orantech, WinIT, Calanit Carmon, DBbest, Netwise, Pilat, Afek Systems, ELAD

Training Services Market
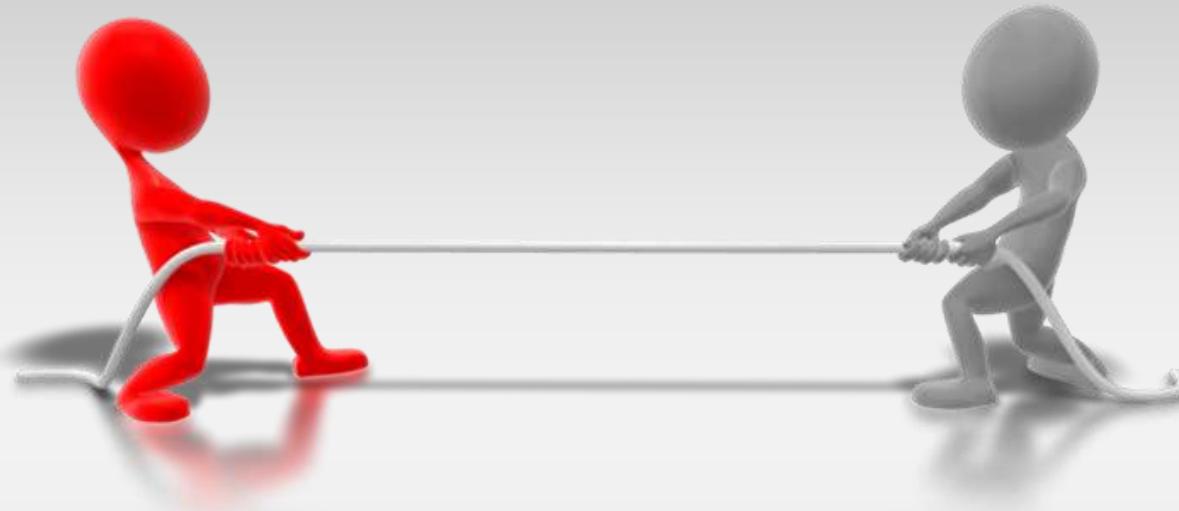
| 2011		2012		2013	
105.0	2.86%	108.0	18.52%	128.0	**training**
105.0	2.86%	108.0	18.52%	128.0	totals

We rank VENDORS by
__REVENUE__
and
__CLIENT MINDSHARE__

All amounts in M $ USD

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We rank VENDORS by REVENUE and CLIENT MINDSHARE

Training
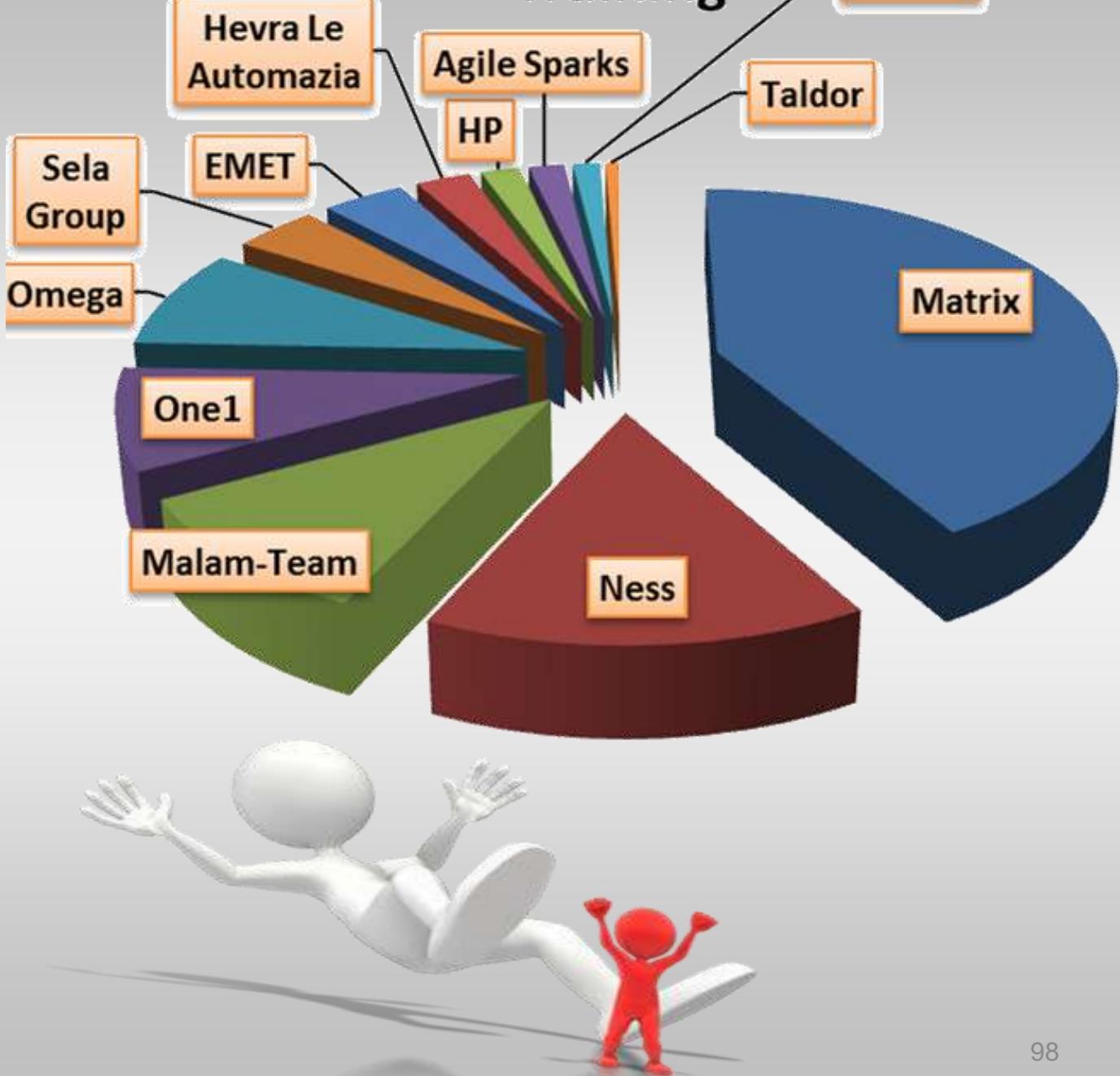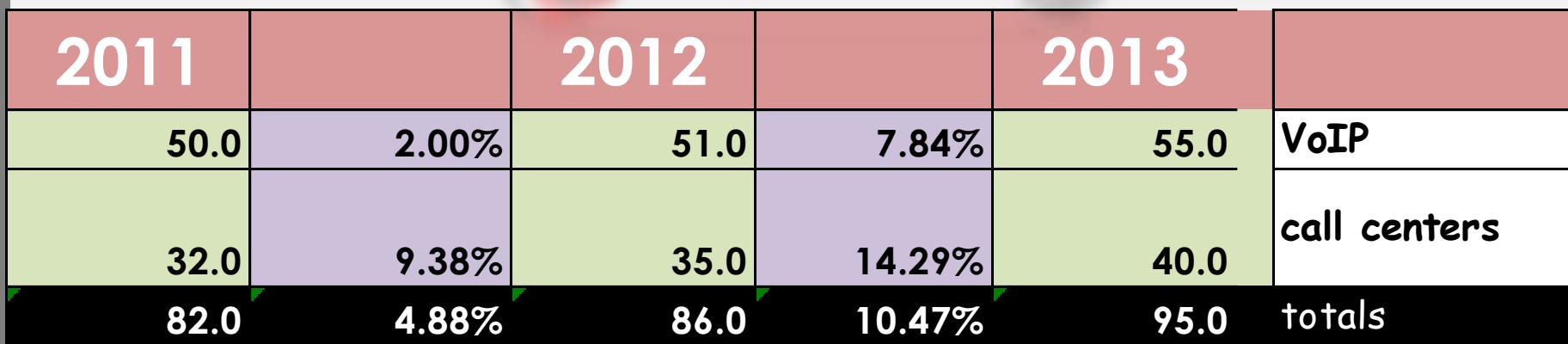
- Experis
- Hevra Le Automazia
- Agile Sparks
- HP
- Taldor
- Sela Group
- EMET
- Omega
- Matrix
- One1
- Malam-Team
- Ness

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98

VoIP Services Market


2011		2012		2013	
50.0	2.00%	51.0	7.84%	55.0	VoIP
32.0	9.38%	35.0	14.29%	40.0	call centers
82.0	4.88%	86.0	10.47%	95.0	totals

We rank VENDORS by
<u>REVENUE</u>
and
<u>CLIENT MINDSHARE</u>

All amounts in M $ USD

Comparison VoIP Market 2012

VoIP/telephony

- Netvision/Cellcom
- Taldor
- TripleC
- Matrix
- Bynet
- Tadiran Telecom
- Malam-Team
- Sensecom
- IBM
- Aginix
- Bezeq Int
- I.E.Mittwoch

VoIP/call center

- Tadiran Telecom
- Ness
- Taldor
- Sensecom
- Aginix
- I.E.Mittwoch
- IT Navigator
- Bezeq Int
- IBM
- Malam-Team
- Bynet
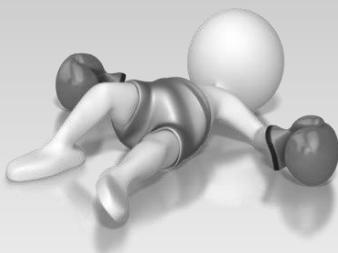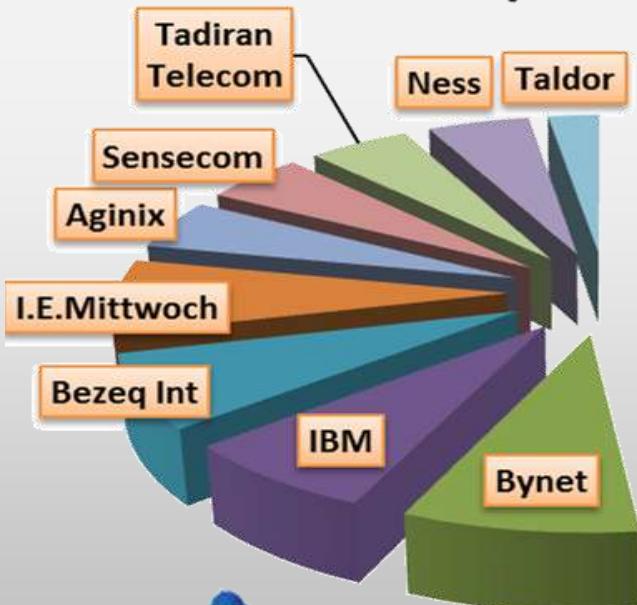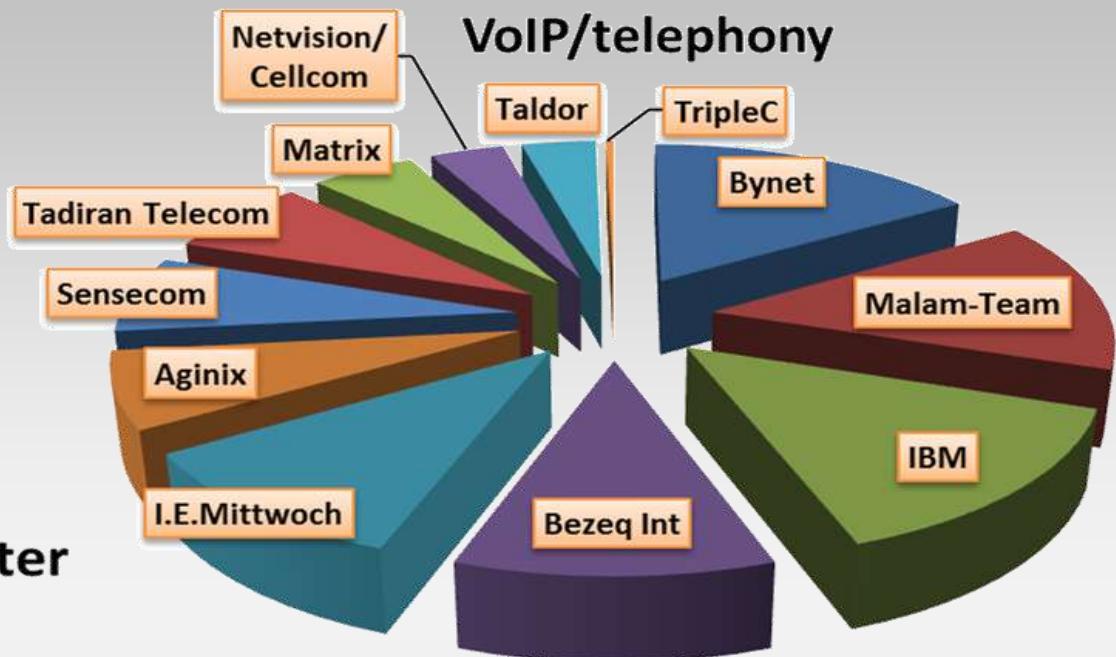
Value Added Services Categories 3

Governance & Risk Management	auditing	ביקורות/רגולציה	**ניהול סיכונים, רגולציות**
	Governance & Risk Management	ניהול סיכונים	
	risk assessment/ penetration tests	הערכת סיכונים ומבדקי חדירה	
	security projects	אבטחת מידע	
	other	אחר	
OUTSOUCING SERVICES	"off site" data center/hosting (finger only services)	מרכז מחשוב חיצוני, מחוץ לבית הלקוח (אירוח ל-DRP)	**מיקור חוץ**
	"off site" data center - full service (operational/DRP)	מרכז מחשוב חיצוני, מחוץ לבית הלקוח באחריות מלאה של ספק	
	Call Centers/Help Desk	שירותי תמיכה בלקוחות \ call centers	
	Complete outsourcing	מיקור חוץ מלא	
	application outsourcing	מיקור חוץ אפליקטיבי	
	other	אחר	
	managed infrastructure services	מיקור חוץ כולל לתשתיות	**מיקור חוץ תשתיות**
	storage management	לתחום האחסון	
Infrastructure Outsourcing	DBA services	לשירותי DBA	
	security services	לשירותי אבטחת מידע	
	other	אחר	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Governance, Risk, Regulation and Security Market

| 2011		2012		2013	
40.0	5.00%	42.0	19.05%	50.0	Governance & Risk Management (also BCP)
20.0	5.00%	21.0	14.29%	24.0	Risk assesment & penetration tests
15.0	20.00%	18.0	5.56%	19.0	Security Auditing
120.0	4.17%	125.0	12.00%	140.0	Security Projects
195.0	5.64%	206.0	13.11%	233.0	total risk

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Governance & Risk Management

We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

Vendors: Aman Computers, Orantech, ALD, ELAD, Methoda, ValuePlus, SQLink, One1, Tulip, Byon, HMS, IBM, Taldor, PWC, Ernest & Young, Secoz, Matrix, BDO, Deloitte, Accenture, Gstat

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103

Comparison Security Projects Market 2012

Security Projects

Malam-Team, EMET, Trustnet, 2Bsecure, Comda, New Age, Taldor, Securenet, One1, Bynet, calcom, Aman Computers, Bezeq Int, Hevra Le Automazia, LogOn, Magalcom, NGSoft, Partner/012, Comm IT, We (Hilan), Matrix, Avnet, HP, IBM
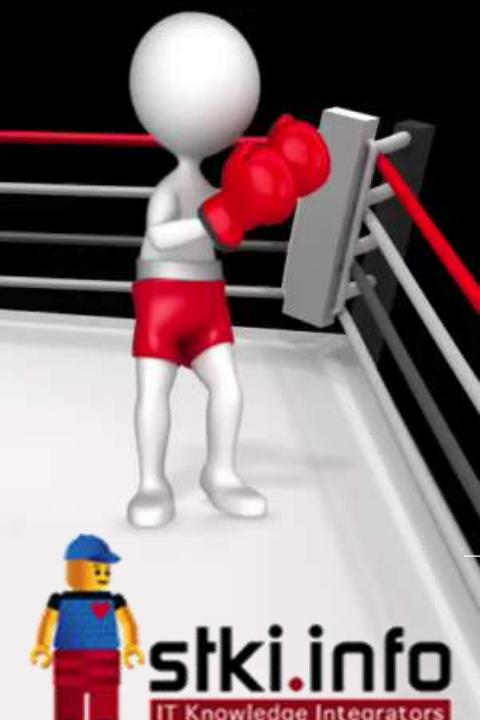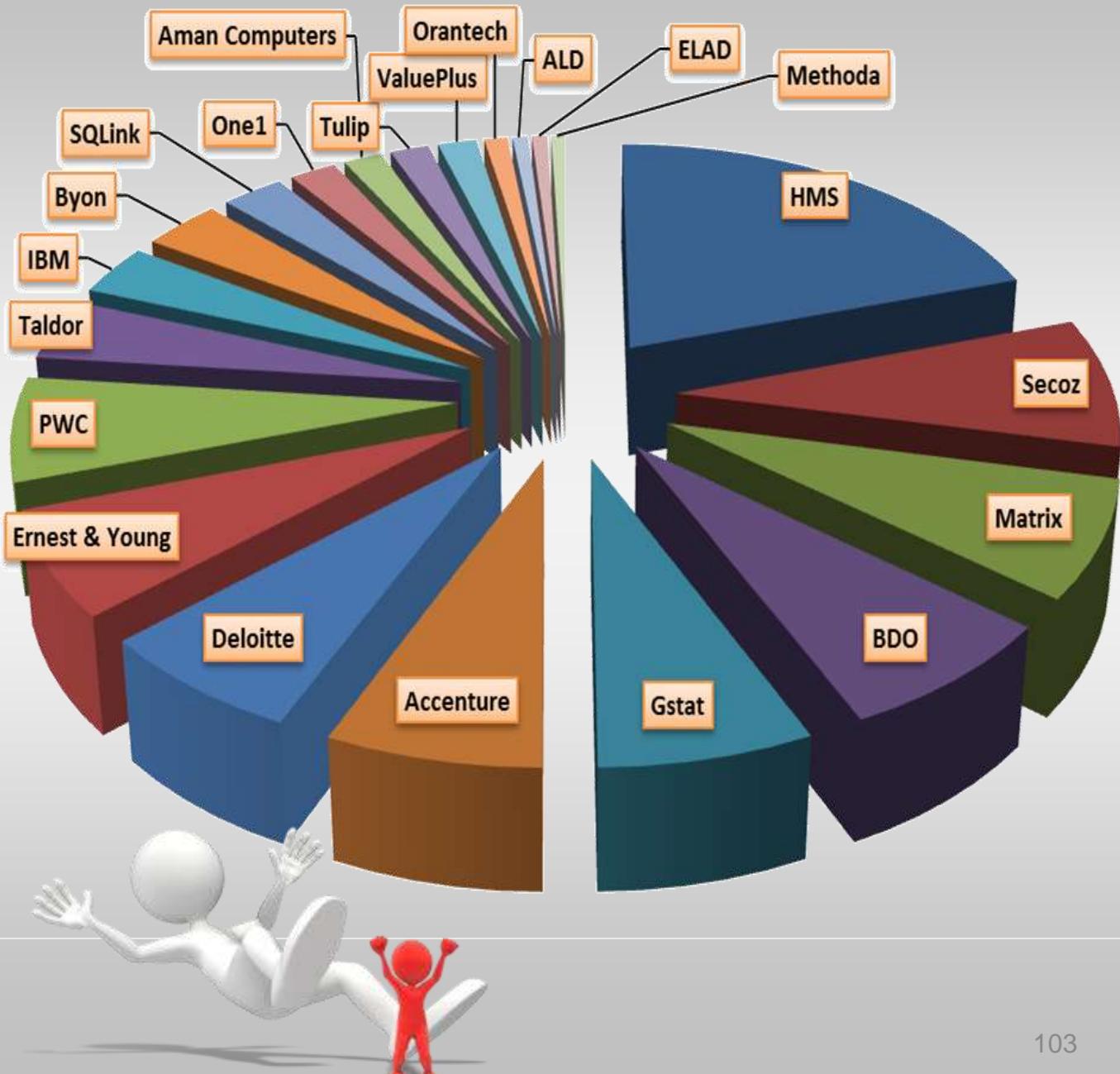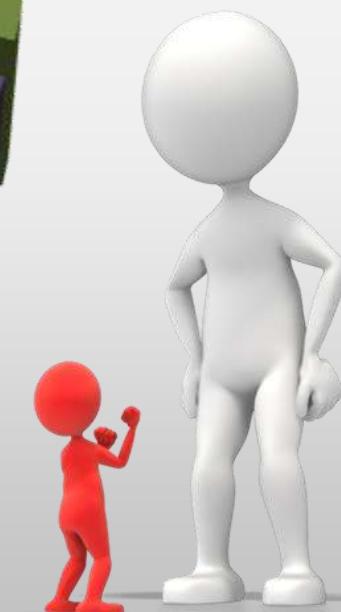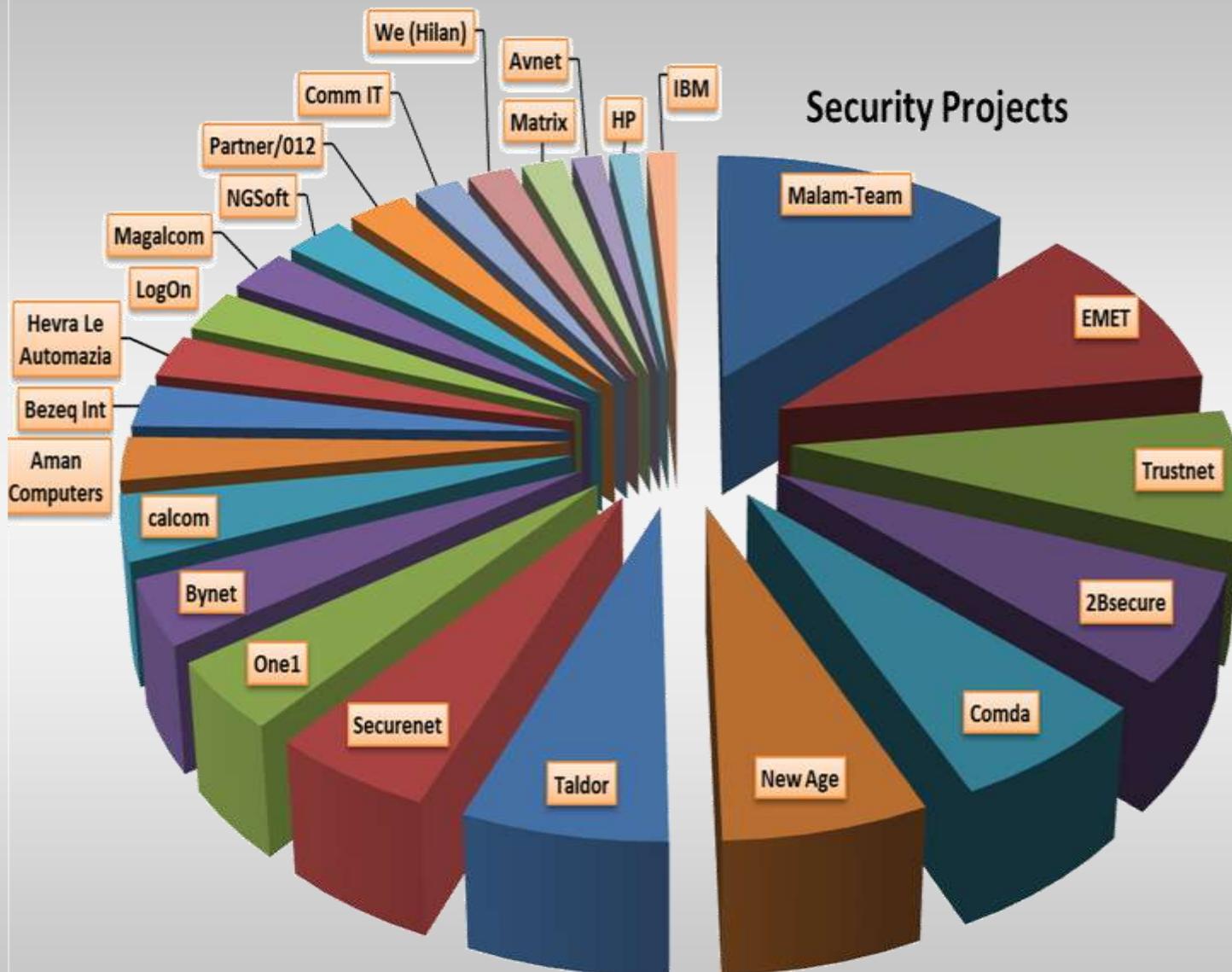
Comparison Security Projects Market 2 2012

Risk Assesment & Penetration Tests

Bugsec
SQLink
Secoz
2Bsecure
Ernest & Young
Comsec
Liacom
Maglan
Citadel
Avnet

IPV Security
IPGroup
C4
Partner/012
Dor –IT
Brillix
Raz-Lee
Aman Computers
Comm IT

Outsourcing Market
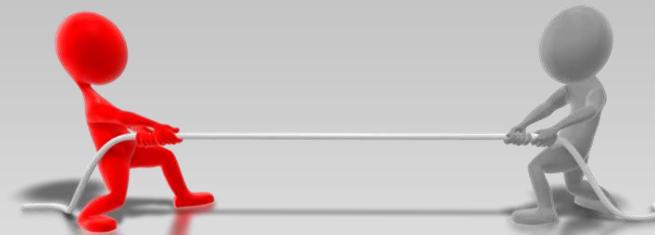
| 2011		2012		2013			
50.0	4.00%	52.0	7.69%	56.0	Archiving Services		
50.0	4.00%	52.0	15.38%	60.0	"off site" DC/finger services (hosting, real estate, etc)		
40.0	25.00%	50.0	10.00%	55.0	"off site" DC/full service/DRP		
60.0	3.33%	62.0	9.68%	68.0	call centers/help desk		
160.0	1.25%	162.0	4.94%	170.0	Complete outsourcing		
42.0	9.52%	46.0	13.04%	52.0	application outsourcing		
40.0	5.00%	42.0	7.14%	45.0			Managed services
15.0	20.00%	18.0	16.67%	21.0			storage
32.0	12.50%	36.0	8.33%	39.0		infrastructure outsourcing	DBA
18.0	16.67%	21.0	38.10%	29.0			security
32.0	6.25%	34.0	17.65%	40.0			printing/copying/faxing
539.0	6.68%	575.0	10.43%	635.0	totals		

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Off-site DC (finger services only)
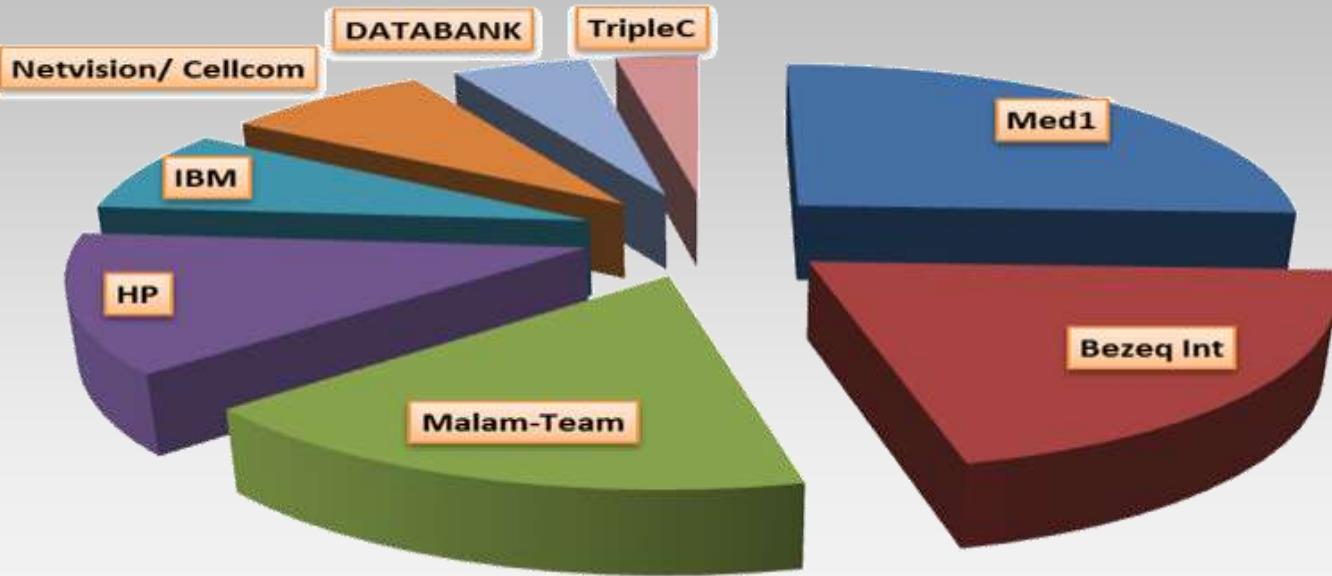
Vendors shown: Med1, Bezeq Int, Malam-Team, HP, IBM, Netvision/ Cellcom, DATABANK, TripleC

Off-site DC (fullservice, operational/DRP)

Vendors shown: IBM, Bezeq Int, HP, Netvision/ Cellcom, Smile 012, Realcommerce, We (Hilan), TripleC

107

Comparison Outsourcing Market 2012

Complete Outsouring

- Bezeq Int
- Aman Computers
- Hevra Le Automazia
- Matrix
- NPtech
- Yael Software
- ELAD
- Ardom
- Taldor
- Ness
- Malam-Team
- IBM
- HP

Application Outsourcing

- Matrix
- Amdocs
- Consist
- Ness
- Yael Software
- One1
- IBM
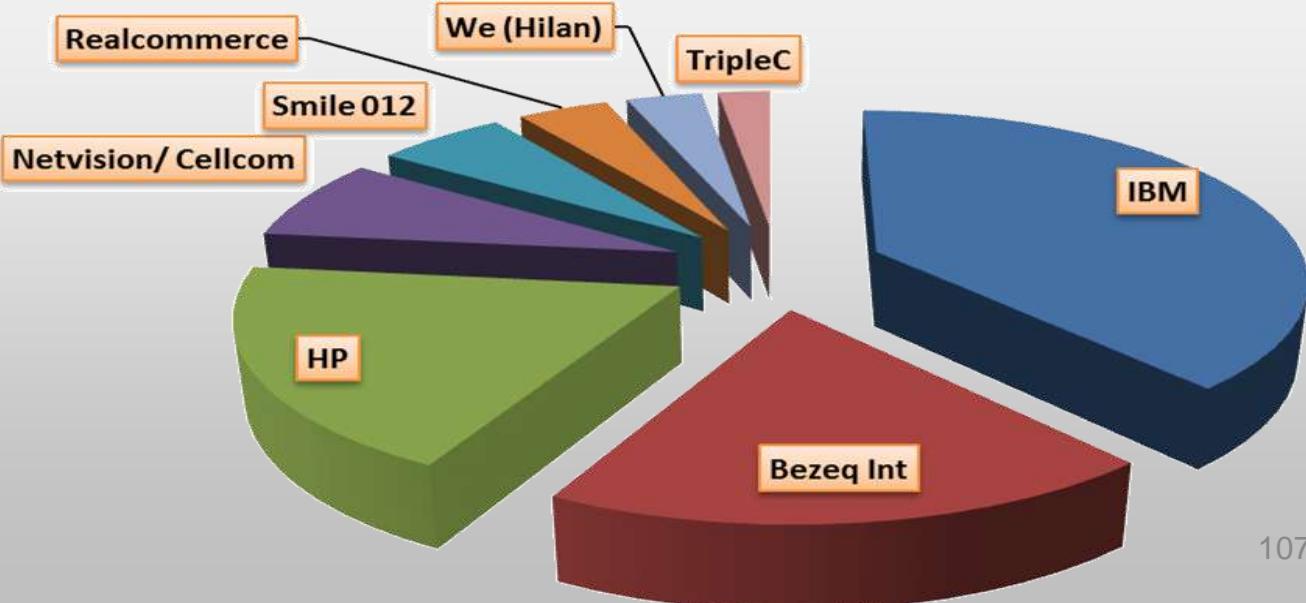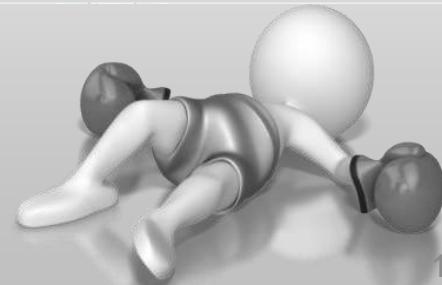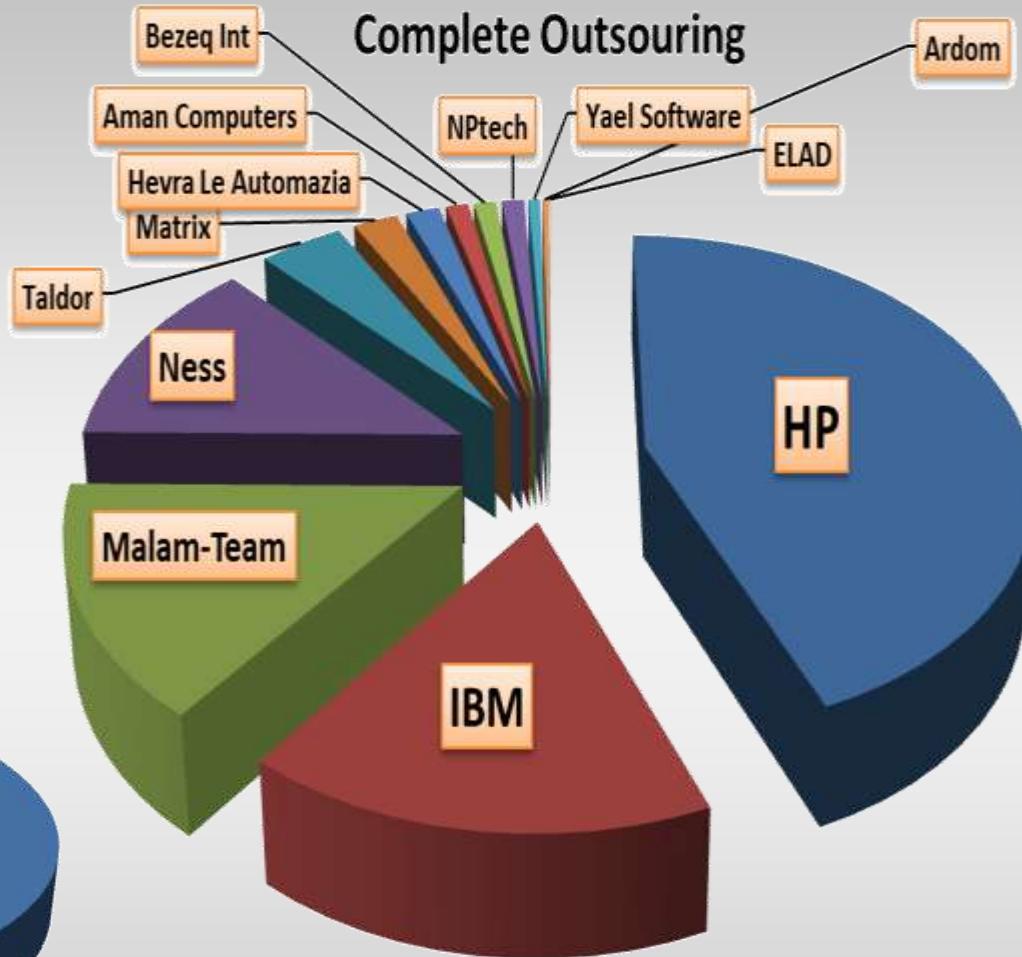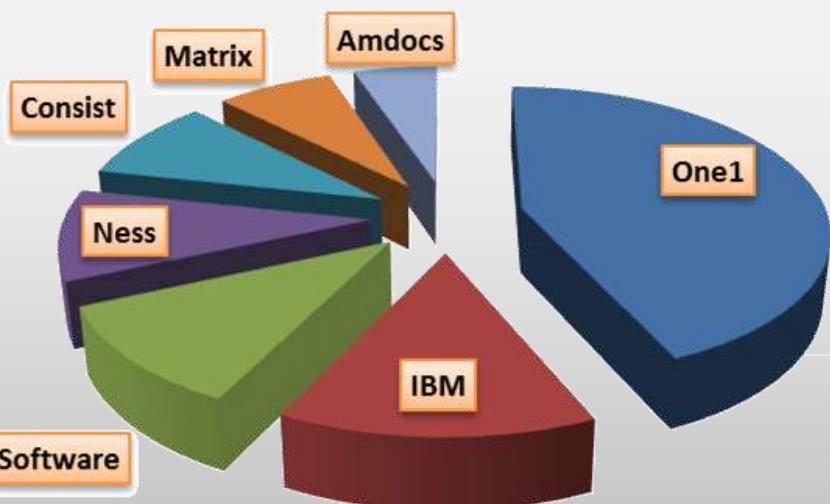
Comparison Outsourcing Market 2 2012

DBA Outsourcing Services

- Matrix
- Veracity
- Oracle
- Microsoft
- GlassHouse
- Valinor
- Advantech
- Bynet
- EMET
- One1
- db@net
- Taldor
- ACS
- Malam Team
- InspireGEC
- SoftwareAG
- IBM
- ELAD
- Brillix
- Afek Systems
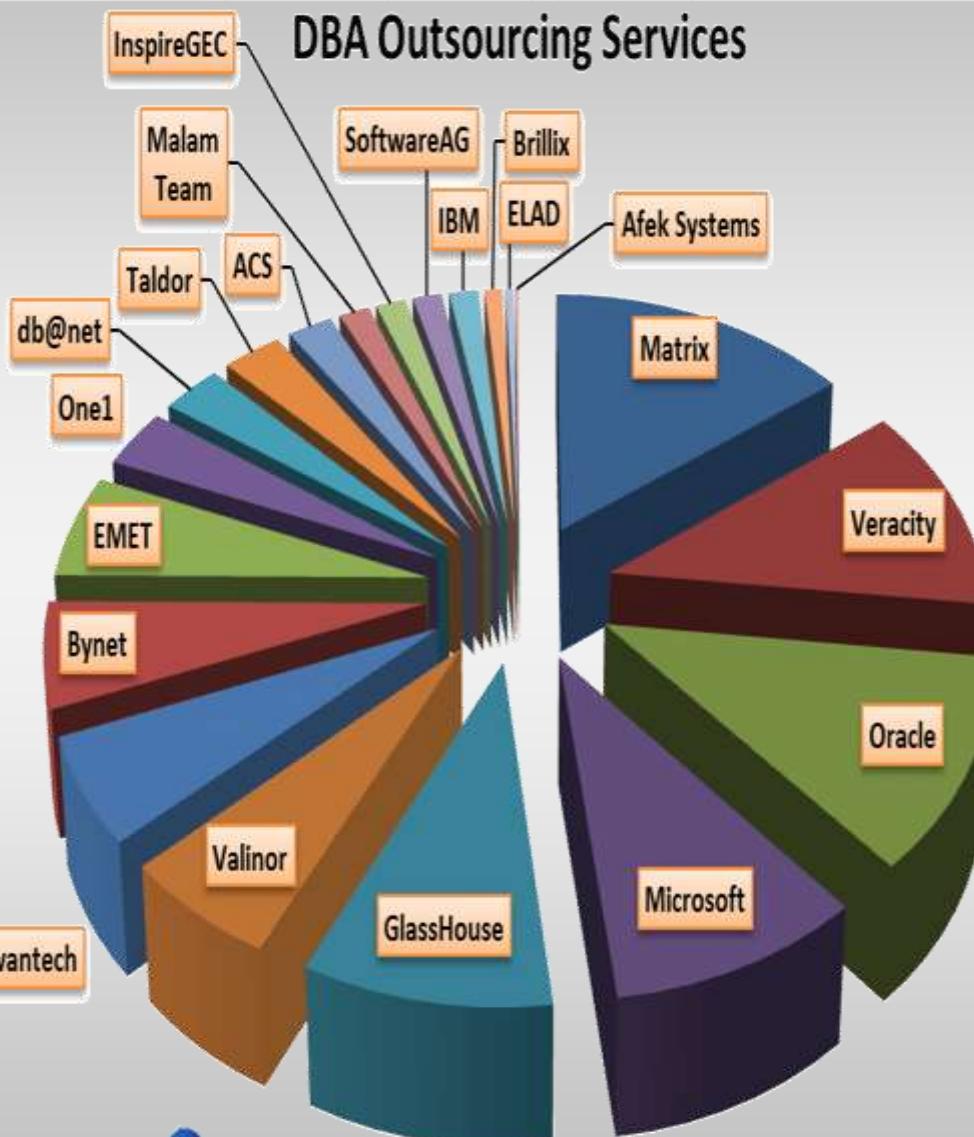
Storage Management Outsourcing

- One1
- openstorage
- MindU
- Matrix
- Bynet
- Malam-Team
- GlassHouse
- EMET
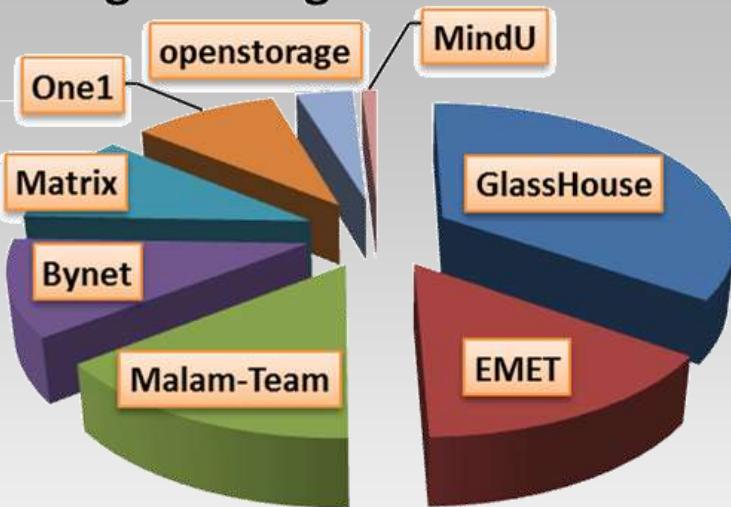
Call Center/Help Desk Outsourcing

- Netvision/Cellcom
- Aztek/Maya
- ELAD
- Bezeq Int
- Taldor
- HP
- Calanit Carmon
- Matrix
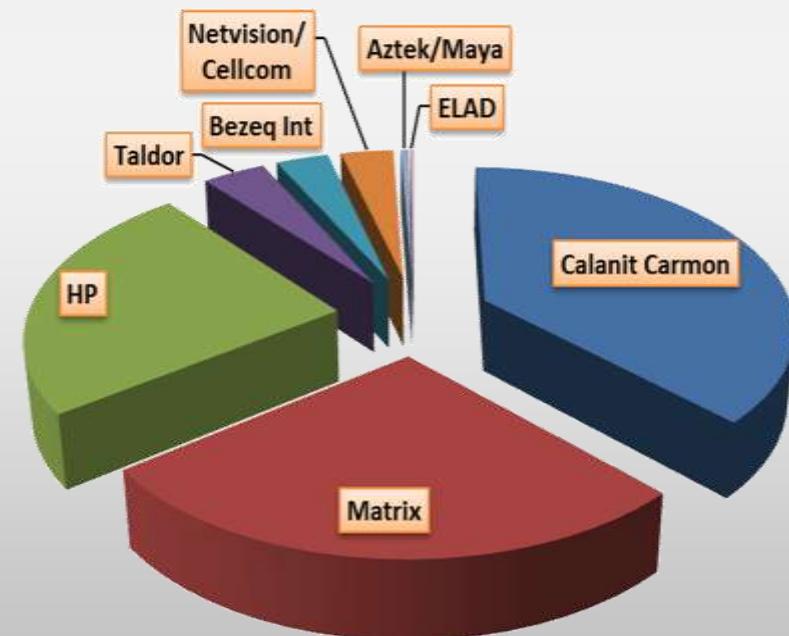
Value Added Services Categories 4

Cloud Services	BP as a Service BPaaS(salaries,call centers, etc)	תהליך עסקי במודל מחשוב ענן (משכורות, מרכזי שירות)	מחשוב ענן (הכוונה לשימוש בשירותי ענן)
	Platform as a Service PaaS	פיתוח והרצה במודל מחשוב ענן (PAAS)	
	Software as a Service SaaS	אפליקציות במודל מחשוב ענן (SaaS)	
	Infrastructure as a Service IaaS	תשתיות במודל מחשוב ענן (Iaas)	
Staff augmentation	Gulgalot	"גולגלות" - הניהול באחריות הלקוח	כוח אדם/קבלנים
	Nearshore	נירשור	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

Cloud Services Market
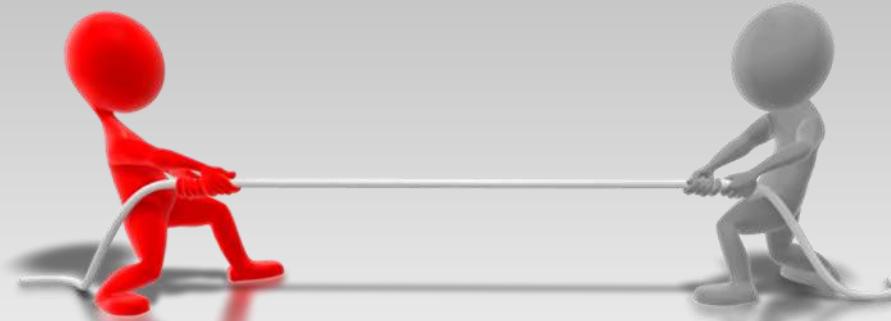
| 2011		2012		2013	
100.0	2.00%	102.0	3.92%	106.0	BPaaS
15.0	33.33%	20.0	75.00%	35.0	PaaS
40.0	5.00%	42.0	42.86%	60.0	SaaS
18.0	11.11%	20.0	75.00%	35.0	IaaS
173.0	6.36%	184.0	28.26%	236.0	totals

We rank VENDORS by
<u>REVENUE</u>
and
<u>CLIENT MINDSHARE</u>

All amounts in M $ USD

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Comparison
XaaS Market 2012

BPaaS

- Netvision/ Cellcom
- Smile 012/Partner
- Aman Computers
- Comda
- TripleC
- ITTI
- Bezeq Int
- Imagestore
- HILAN
- Tikshuv
- Malam-Team
- Taldor

IaaS

- Netvision/ Cellcom
- One1
- We (Hilan)
- Amazon
- TripleC
- Bynet
- Bezeq Int

PaaS

- Google
- Amazon
- Microsoft
- SalesForce

We rank VENDORS by REVENUE and CLIENT MINDSHARE

SaaS

Oracle
Yael Software
Bynet
TripleC
Aztek/Maya
Talentech
Symantec
We-Doit
Amarel
Bgate
Webox
Zoho
MyBusiness
Taldor
BDO
BroadDigital
AKT
Netsuite
Bezeq Int
HP
Google
Microsoft
Aman Computers
Comax
milgam
Salesforce
Hevra Le Automazia

SaaS

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Staff Augmentation Market

2011		2012		2013	
350.0	-12.86%	305.0	-9.84%	275.0	Staff Augmentation
120.0	25.00%	150.0	23.33%	185.0	Nearshore
470.0	-3.19%	455.0	1.10%	460.0	TOTAL

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M $ USD

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Comparison Staff Augmentation Market 2012
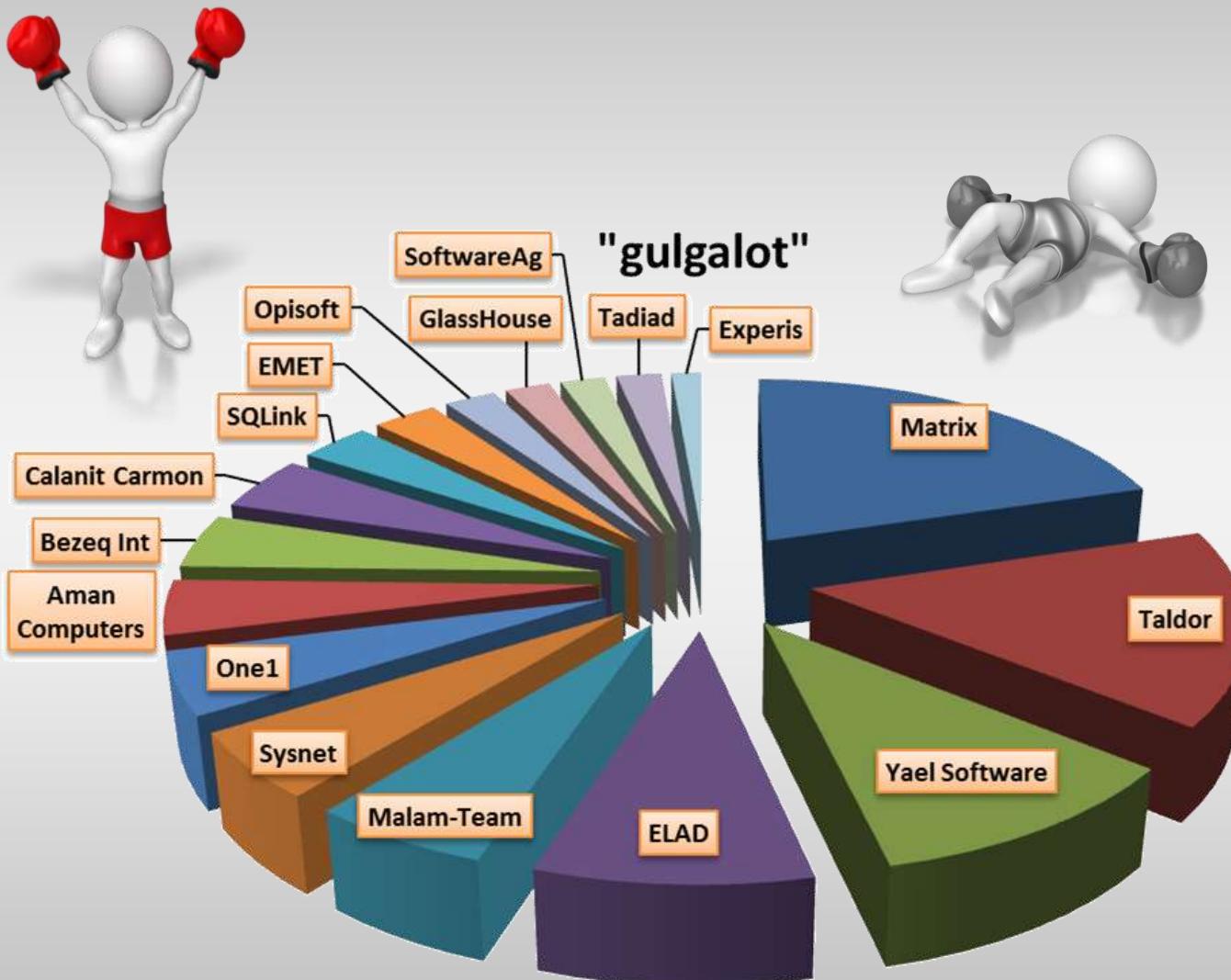
HP
LogOn
Tvuna milenium
Hevra Le Automazia
Top Group
C.BIT
Dor –IT
SmartIT
Aztek/Maya
Data Cube
Comsec
Aginix
Eternity
GBS
MindU
Active View
Pilat
IntegrITy
Brillix

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Near-Shore Services

We rank VENDORS by **REVENUE** and **CLIENT MINDSHARE**

Aman Computers

Xioma

Malam-Team

One1

Realcommerce

HP

Experis

Galil Software

i-rox

Matrix

Taldor

Ness

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More Information?