

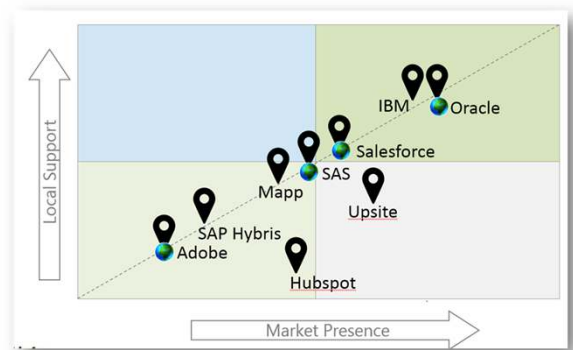
STKI 2020

Volume 2 v3

Israeli IT Market Study (Hardware-Infrastructure)



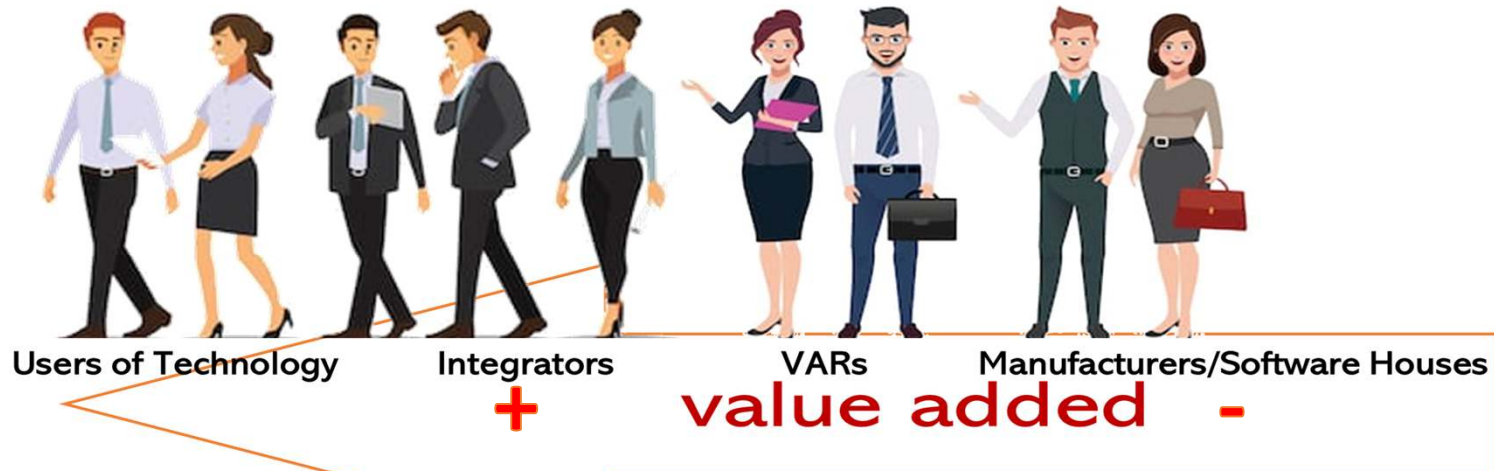
Dr Jimmy Schwarzkopf
jimmy@stki.info
097907000 0547000020



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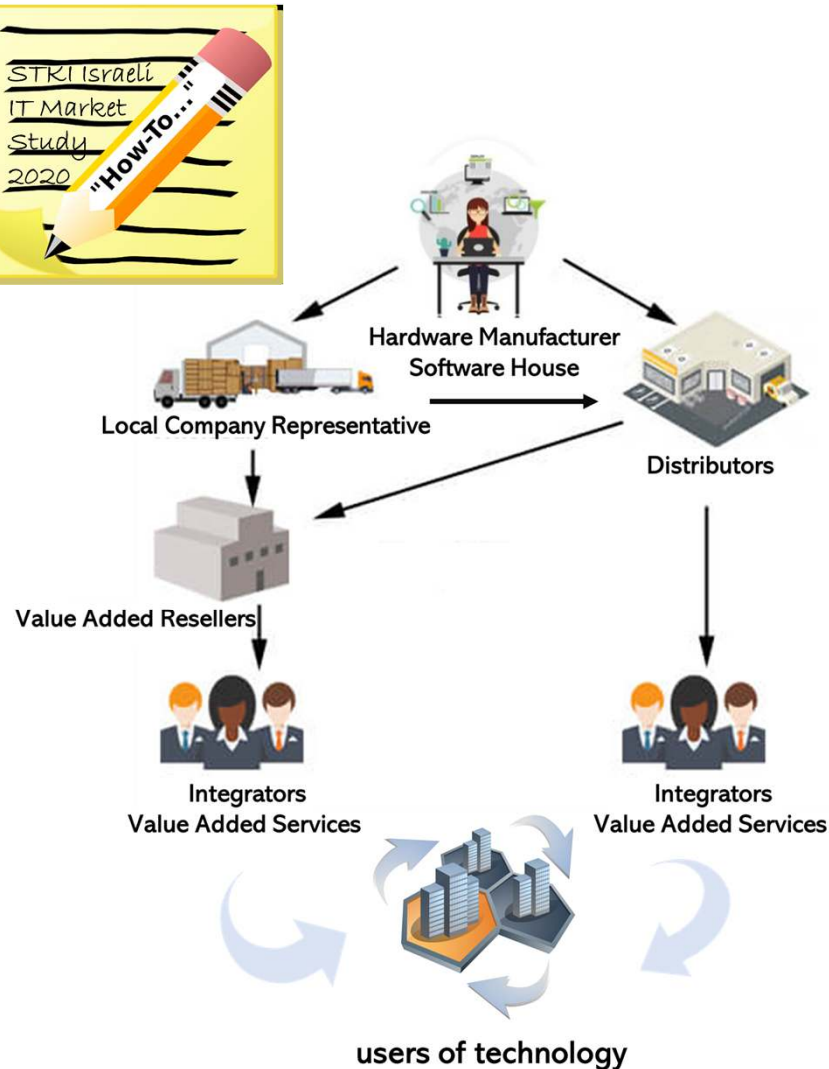


Manufacturers/Software Houses, Distributors, VARs **NO** double bookings for **IT Market Size Forecasts**



Resellers (VARs) get credit only for their value added unless the manufacturer/software house is not present in Israel, then they get full credit.

Integrators and other Value Added Service Providers get credit only for the “services-work” they contributed to the project.



DISTRIBUTORS (usually are not shown in our study) are intermediary reseller entities; between the original **MANUFACTURERS OF HARDWARE PRODUCTS** or **SOFTWARE HOUSES** and other entities in the distribution channel (VARs and INTEGRATORS).

VALUE-ADDED RESELLERS (VARs) offer third party software and hardware to the end user or integrators at a markup, along with a *limited* combination of procurement consulting, configuration, and customization services (*shown under HARDWARE or SOFTWARE*)

INTEGRATORS offer *professional's services* (consulting, developing, implementing or sourcing manpower) in order to deliver enterprise computer services to the organization. (*shown under VALUE ADDED SERVICES*).

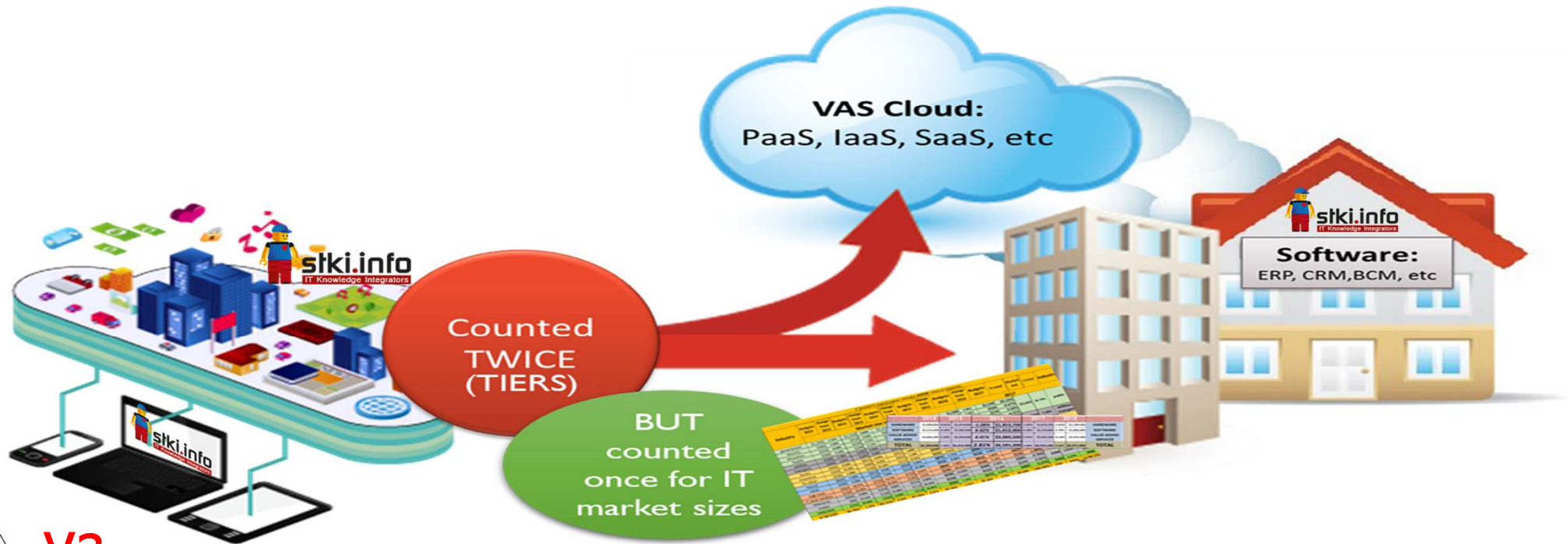
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for SaaS products **“sold”** on the cloud
STKI **“books twice”**

- on-premises software category
- on the SaaS application category

(but **NO** double bookings for the **IT Market Size Forecasts**)



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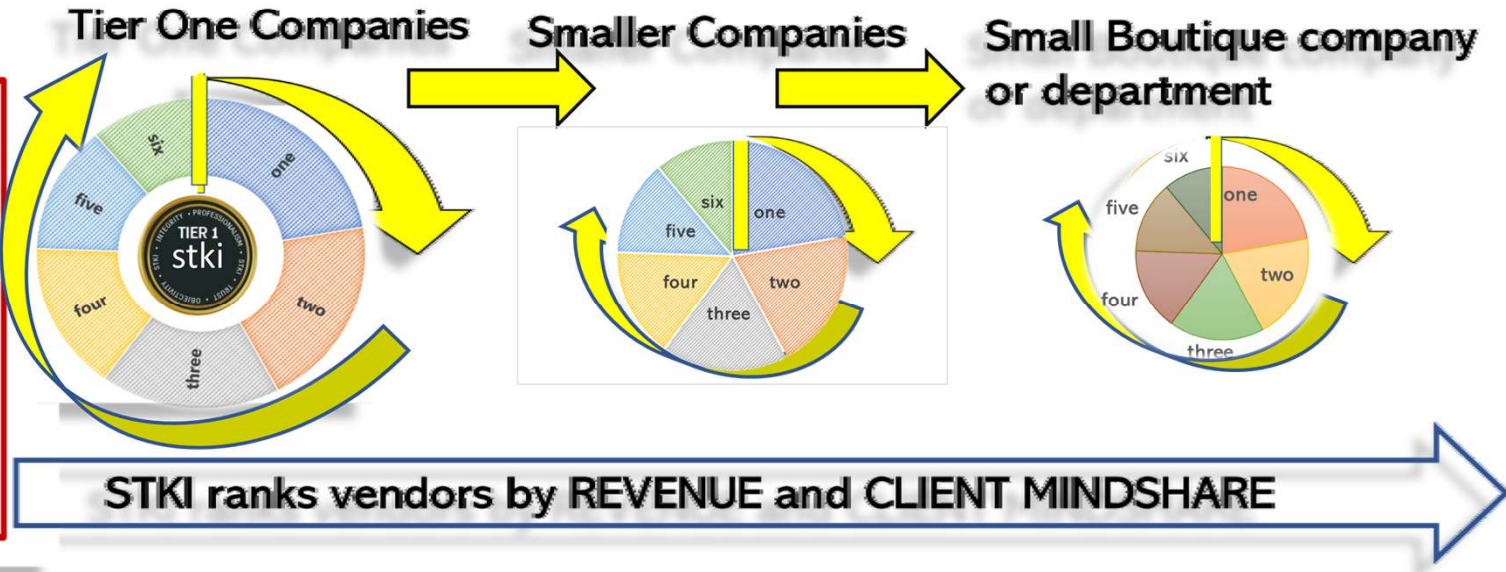
5



The Area a company occupies in the circle is not relevant and has no meaning.

STKI has **signed NDAs** with the vendors (revenues, projects) and we tried to **minimize opportunities for backward engineering of the data .**

STKI calculates market sizes by revenues/sales and not deliveries or invoices



A circular gold seal with a dark blue center. The center contains the text "TIER 1 stki". The outer ring of the seal contains the words "INTEGRITY", "PROFESSIONALISM", "TRUST", and "OBJECTIVITY" separated by dots. The letters "STKI" are also present on the seal.

stki

THE KNOWLEDGE INTEGRATORS

stki Summit 2020

ANNUAL ISRAELI IT MARKET STUDY

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“Israeli Positioning” slides

This is **NOT** a technological or functional positioning and **SHOULD NOT** be used as such.

This positioning is intended to reflect

ONLY THE DEGREE

to which a product is

PRESENT AND SUPPORTED IN ISRAEL



Israeli Product Positioning Slides



Global leaders

according to international analyst firms



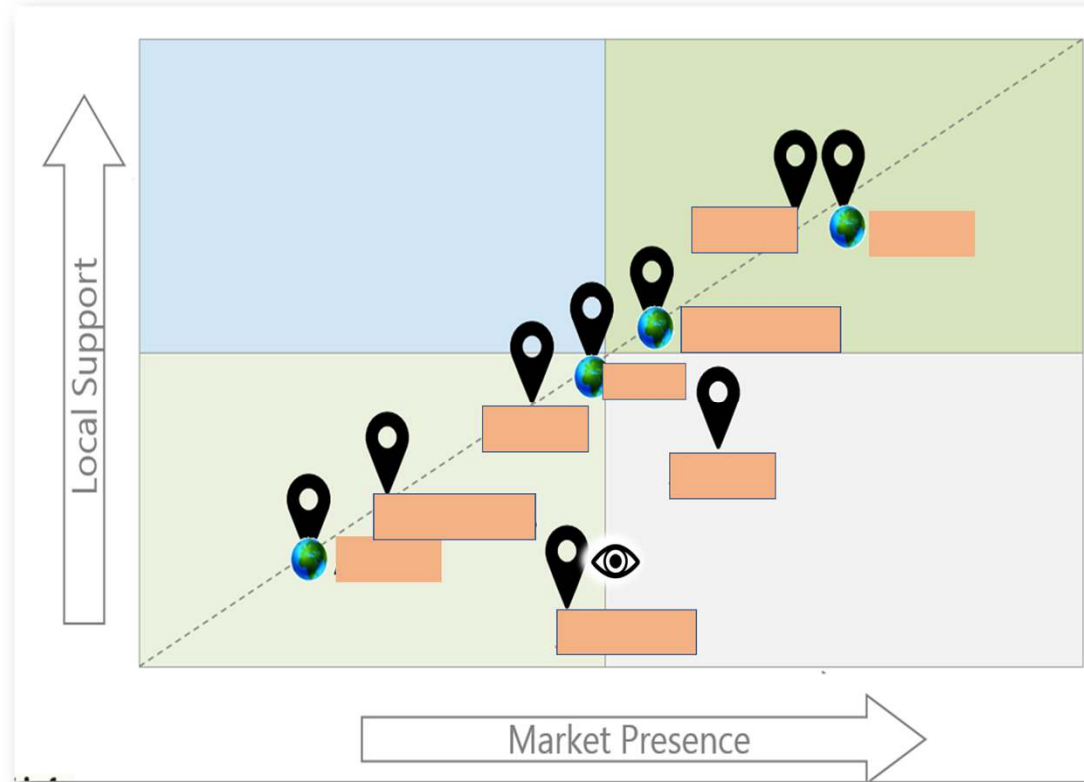
Vendors to watch

New players that only recently entered the market and therefore cannot be evaluated against longtime players

Y axis

(Local Support):

Number and quality of support experts, it's localization and language support and if there is local R&D



X axis (Market Presence)

Installed base; New sales; Mindshare

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Methodology for “Israeli Positioning” 10

is **NOT** a technological or functional positioning and **SHOULD NOT** be used as such. This positioning is intended to reflect **ONLY THE DEGREE** to which a product is **PRESENT AND SUPPORTED IN ISRAEL**

Focused on the enterprise sector (not SMB)

▲ X axis (Market Presence):

Installed base; New sales; Mindshare

▲ Y axis (Local ISRAELI Support):

Number and quality of Sis; localization; local R&D

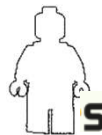


▲ Vendors to watch: New players that only recently entered the market and therefore cannot be evaluated against longtime players



▲ Global leaders: marked according to international analyst firms

V3



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This market study was compiled in the midst of two crises:

11

This period is characterized by an exceptional level of uncertainty regarding the depth of each of the crises, their length, and ramifications for the medium and long terms.

1. **Government crisis** : Due to the political deadlock Israel doesn't have a budget for the second year in a row. Despite that fact, there will be a marked growth of government expenditures and a decline in tax revenues. With the outbreak of the economic crisis, this budget is totally inadequate. A new government has been established but there is uncertainty regarding the policy steps that will be taken in various areas (with and without connection to the coronavirus crisis) and about their impacts on growth, employment, inflation.,
2. **Coronavirus crisis**: A recession seems inevitable, but its depth and duration are highly uncertain, it will depend on the evolution of the disease, the severity and duration of the restrictive measures imposed, and on the nature and magnitude of the economic policy response. The number of unemployed is expected to jump from some 157,000 in 2019 to over 1,250,000 and the numbers of those eligible for unemployment benefits will jump from 75,000 to about 900,000. The Israeli economy and public is experienced in coping with various types of shocks.



STKI IT market study looks at two “POST-COVID19 Transformations”:



Moderate case (forecast 1) considers effects to the Israeli IT market if the pandemic subsides during Q32020



Severe case (forecast 2) looks at the Israeli IT Market if concerns persist until there is a vaccine in 2021 or 2022



Israeli IT Hardware/ Infrastructure Market

2018	changes	2019	changes	2020	changes	2021
1,734,150	1.87%	1,766,500	1.24%	1,788,450	4.67%	1,872,000

FORECAST VERSION ONE



2019	changes	2020	changes	2021	changes	2022
1,766,500	-0.40%	1,759,500	4.04%	1,830,500	4.29%	1,909,000

all amounts in \$KUSD

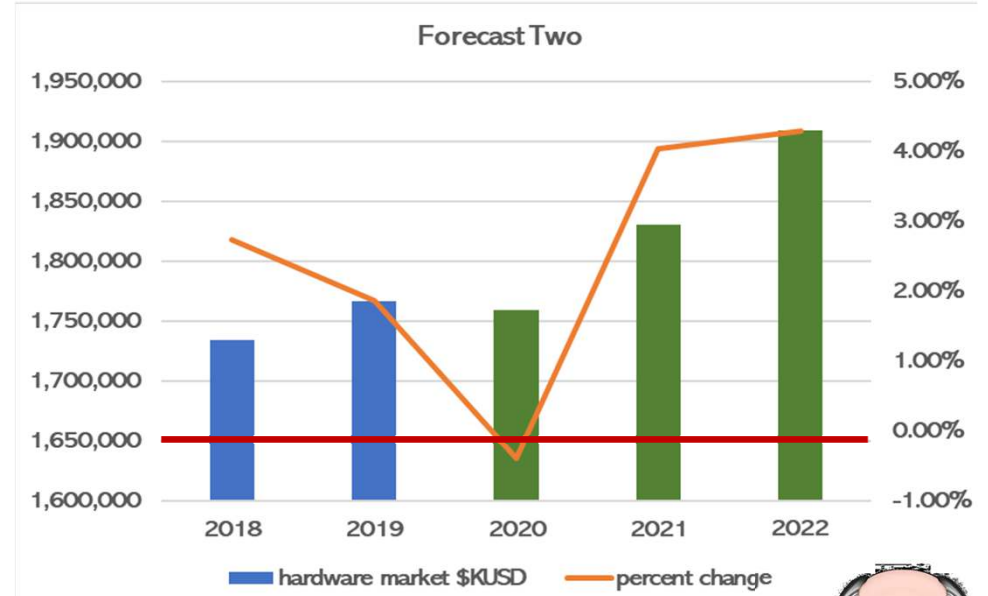
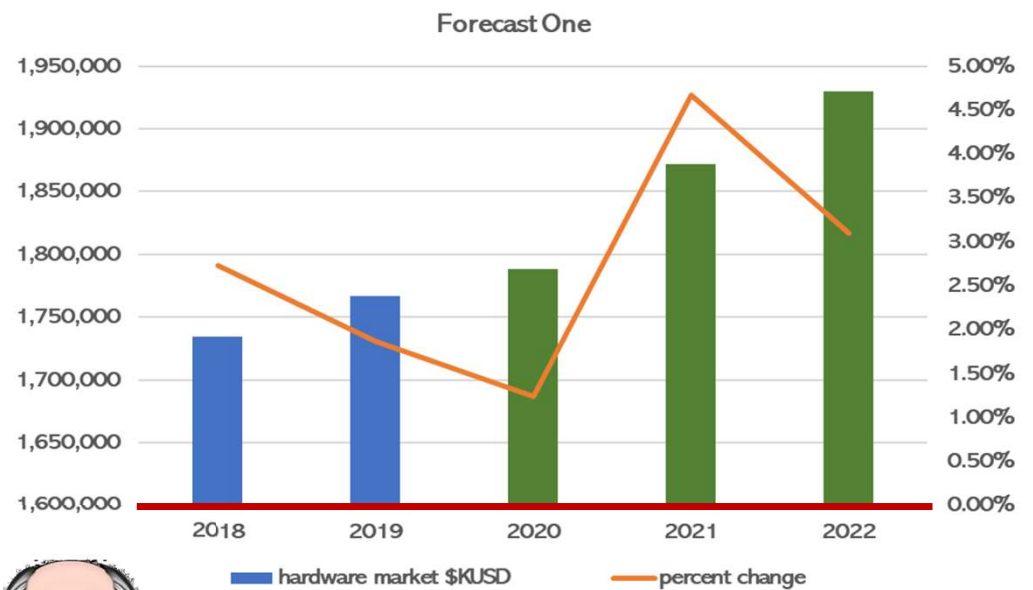
FORECAST VERSION TWO



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Comparison of Forecasts for Hardware/ Infrastructure Market 2017-2022



percentage of IT Budget		2019	2020	2021	2022
hardware	forecast one	24.94%	24.90%	24.85%	24.43%
hardware	forecast two	24.94%	24.88%	24.05%	23.28%

all amounts in \$KUSD



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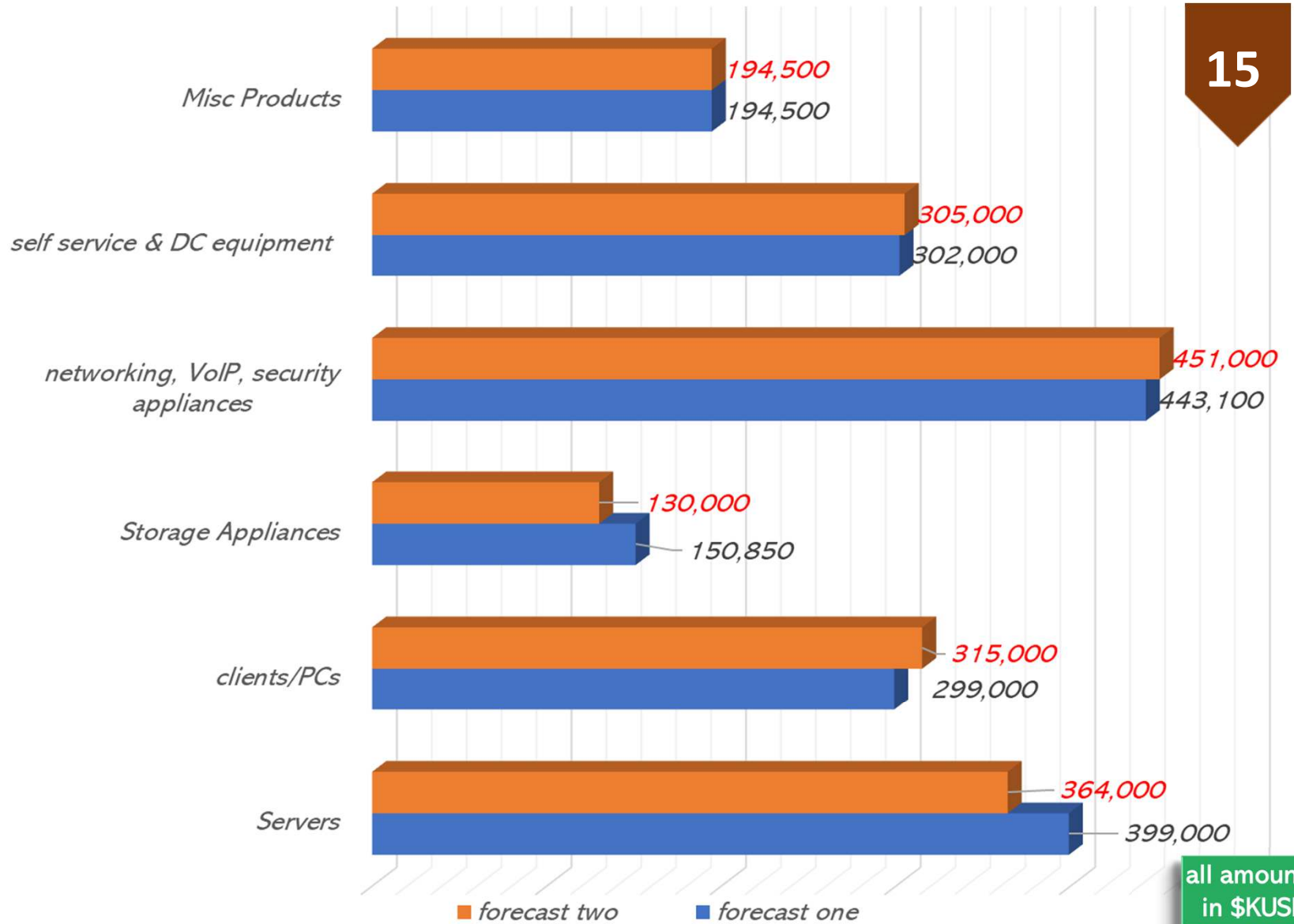
hardware market

Comparison between Forecast one and Forecast two for 2020

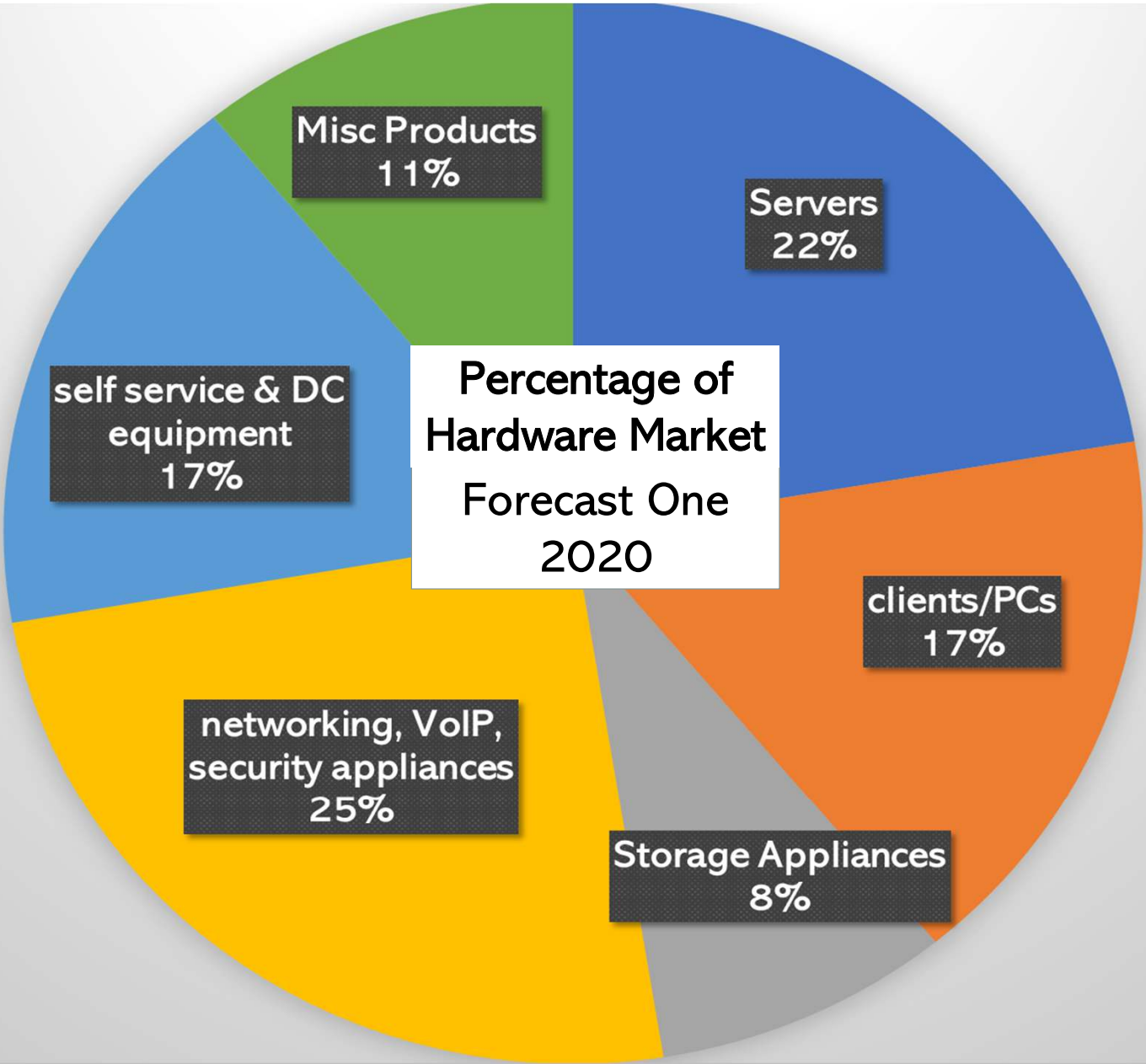
2020 F2 2020 F1

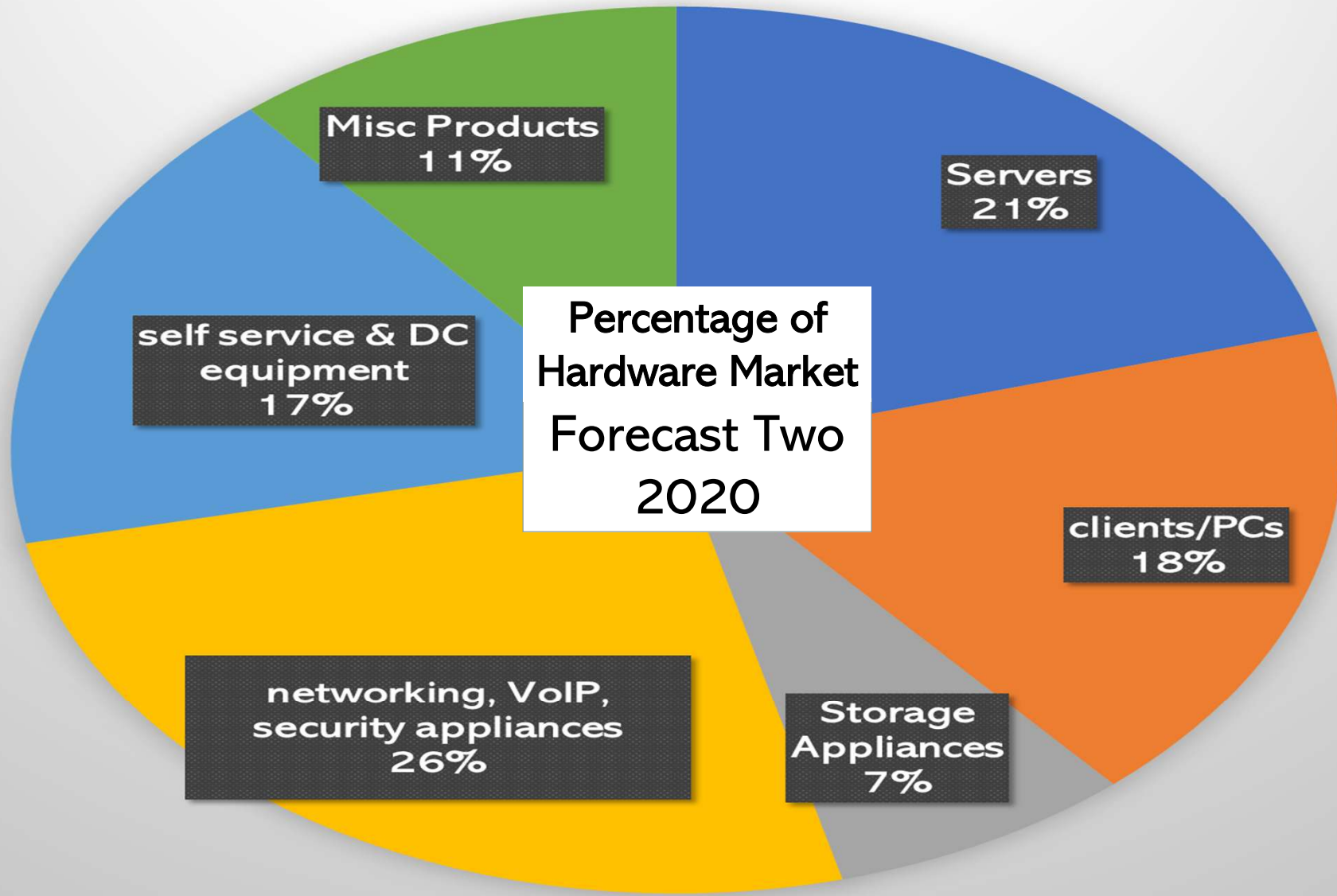


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all amounts in \$KUSD

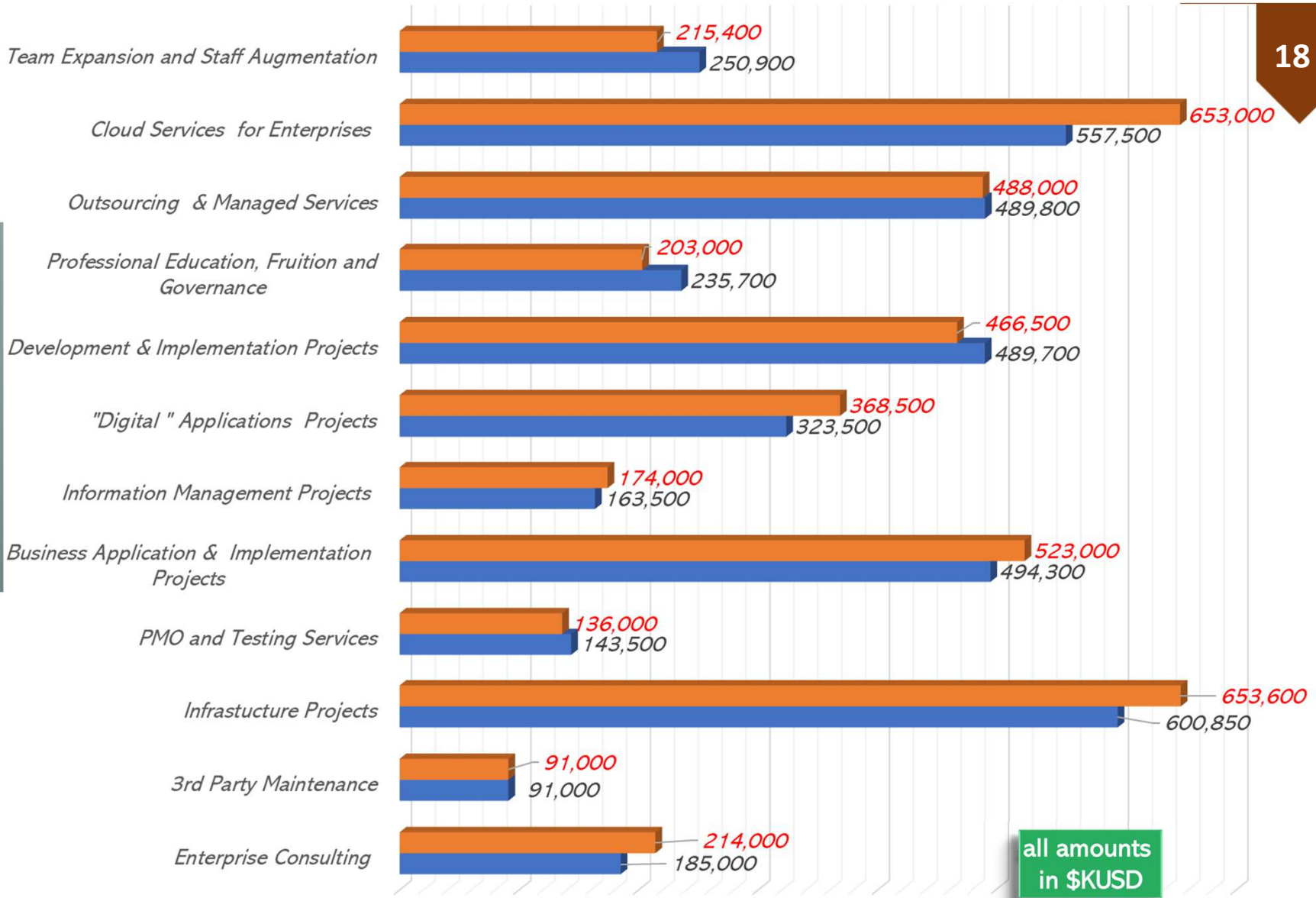






hardware market

Comparison between Forecast one and Forecast two for 2021



2021 F2 2021 F1



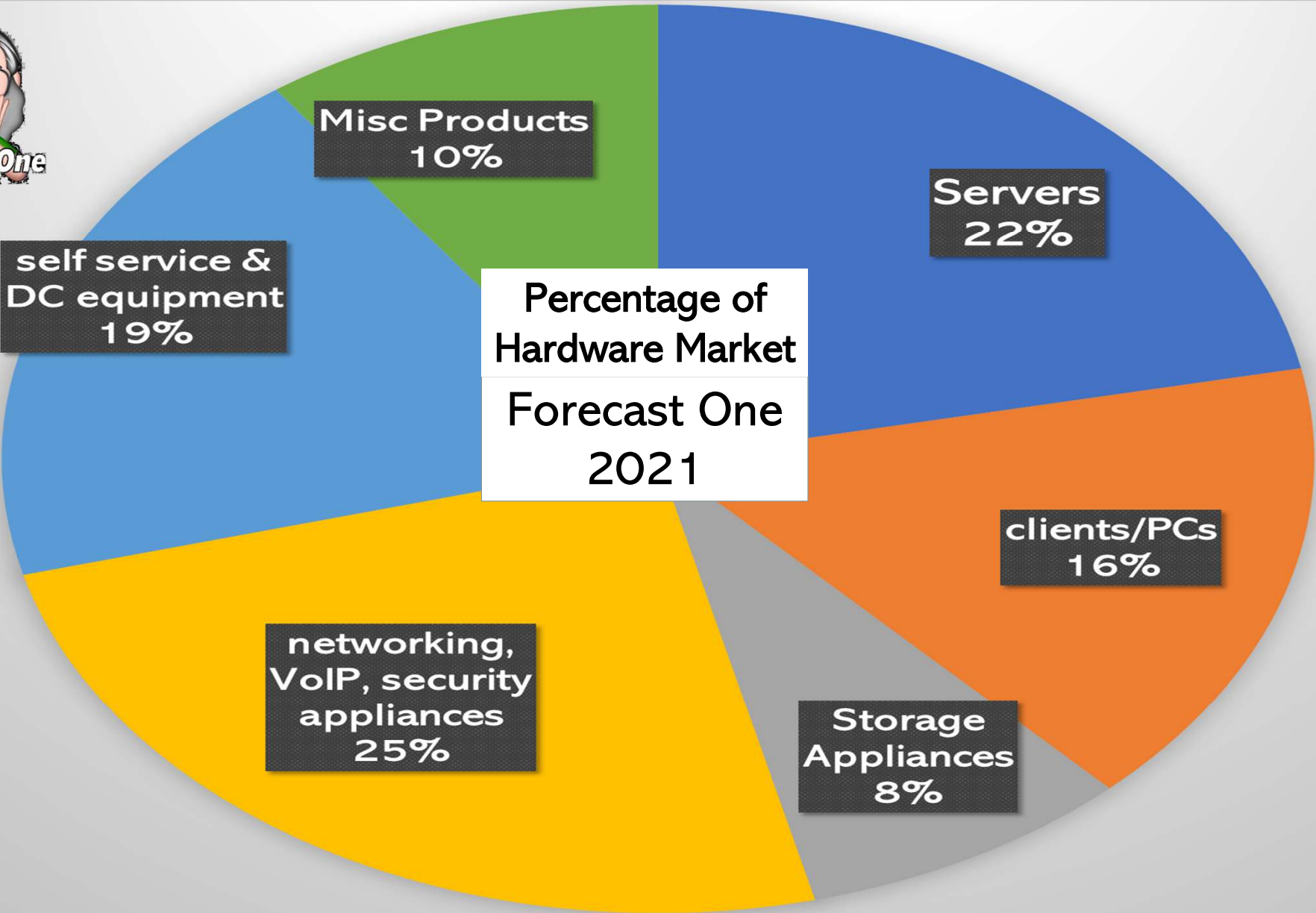
Forecast 2

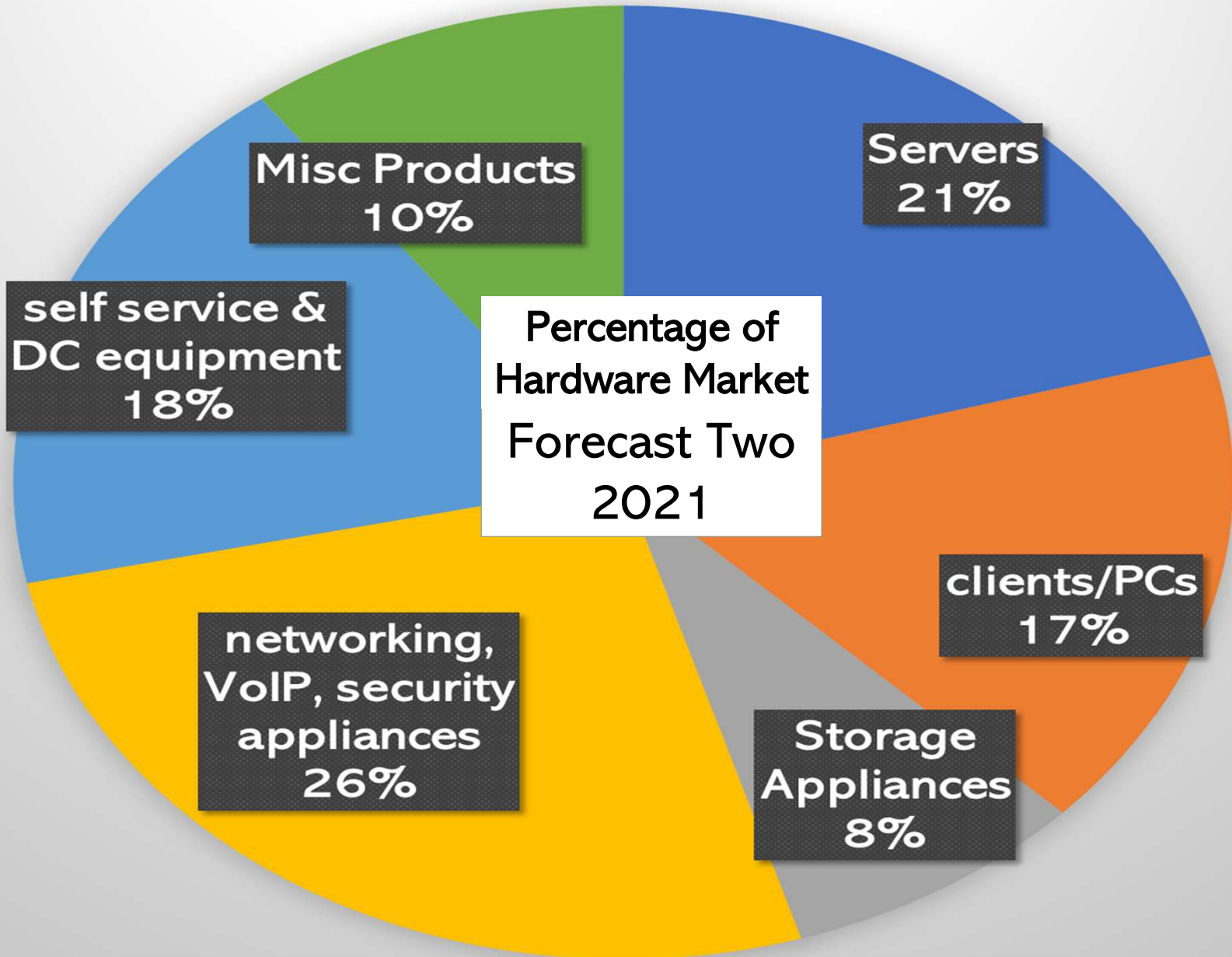
Forecast One



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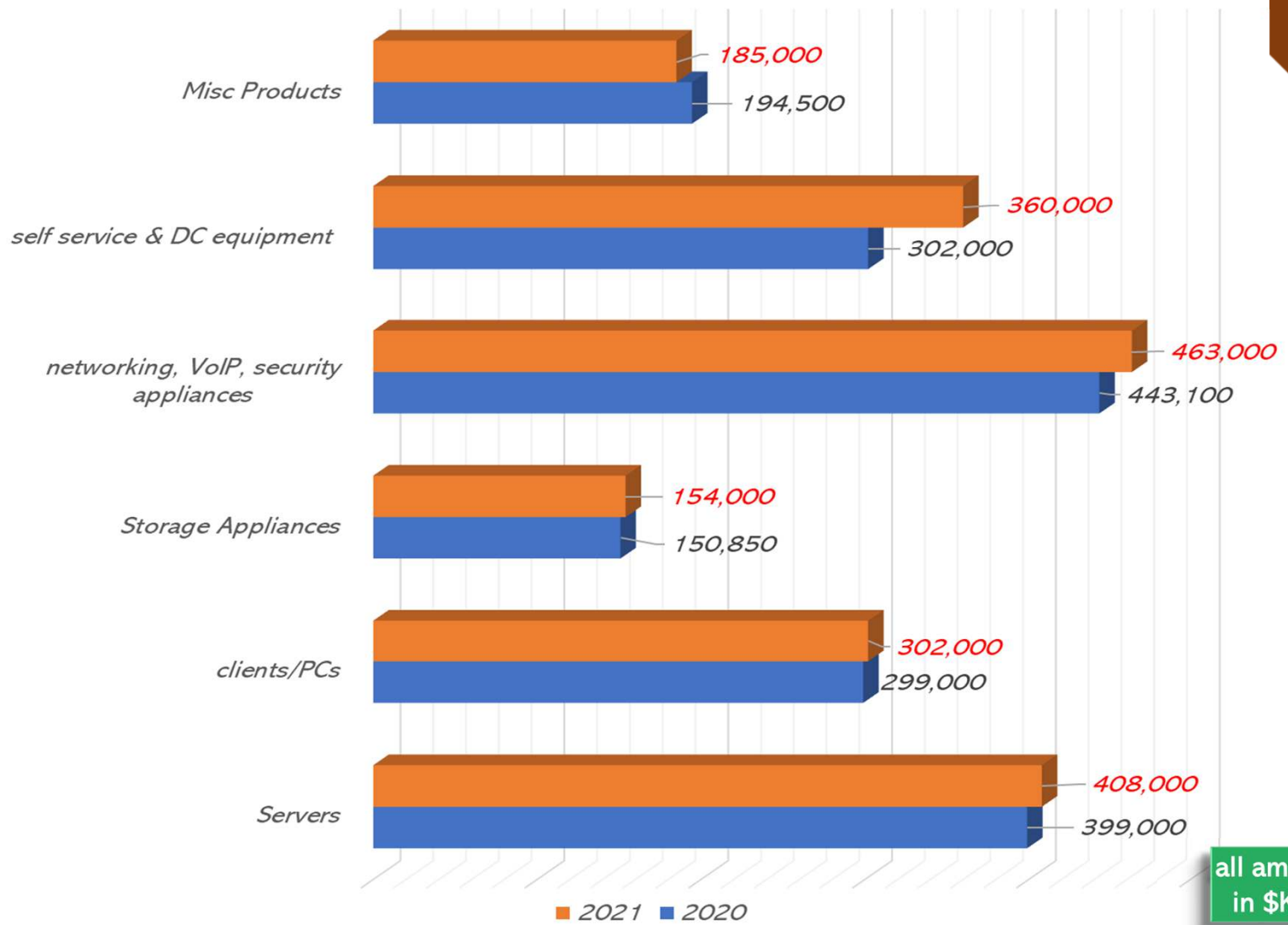
all amounts in \$KUSD







Comparison between 2020 & 2021 using Forecast one



all amounts in \$KUSD

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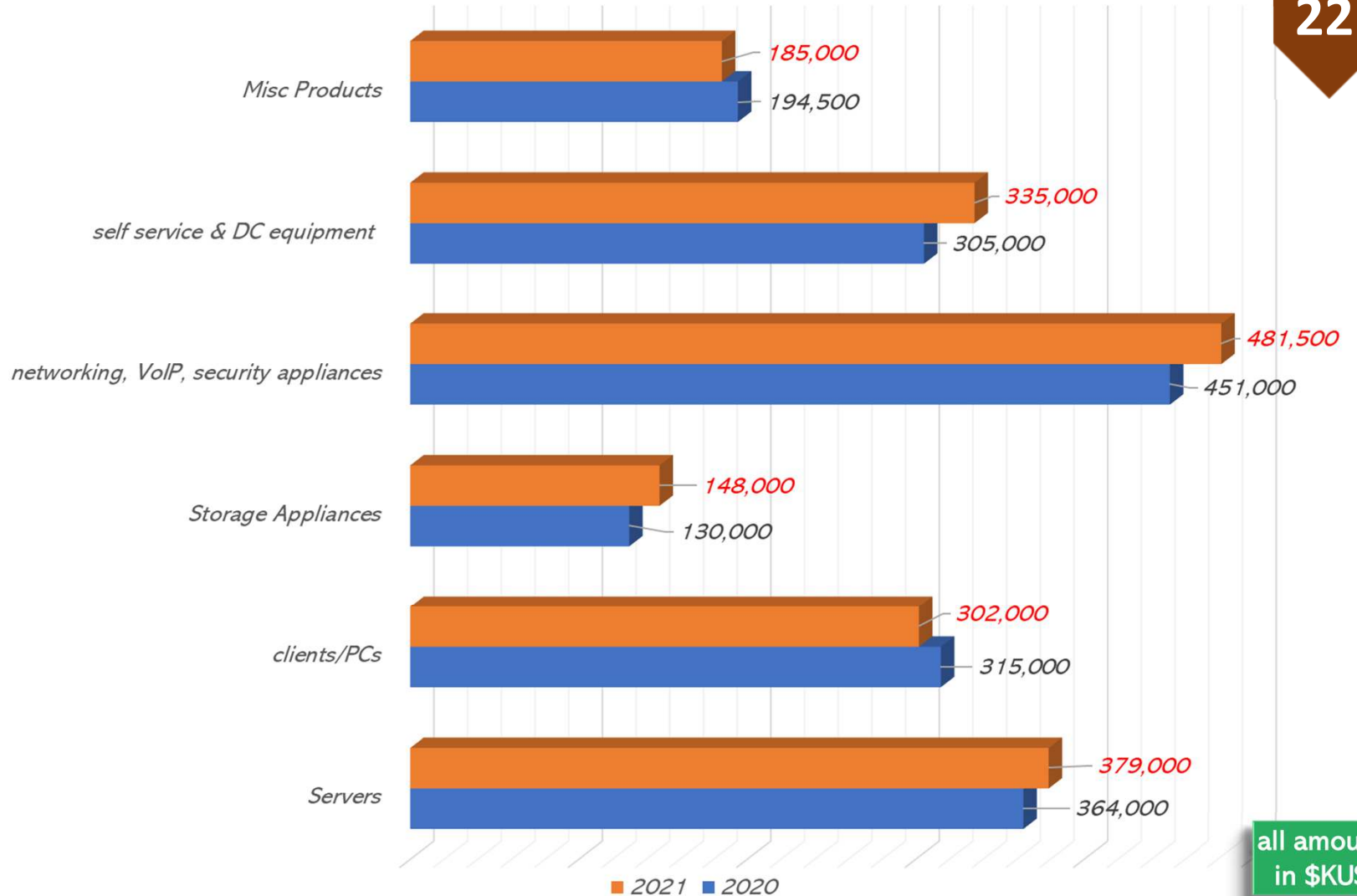


hardware market

Comparison between 2020 & 2021 using Forecast two



Forecast 2



all amounts in \$KUSD



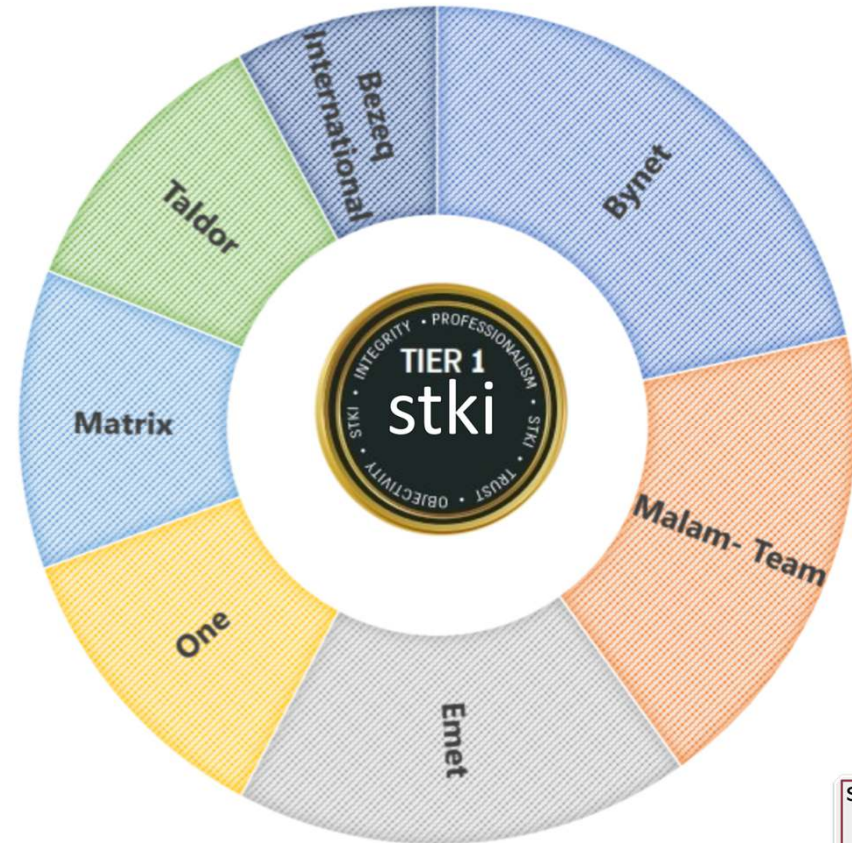
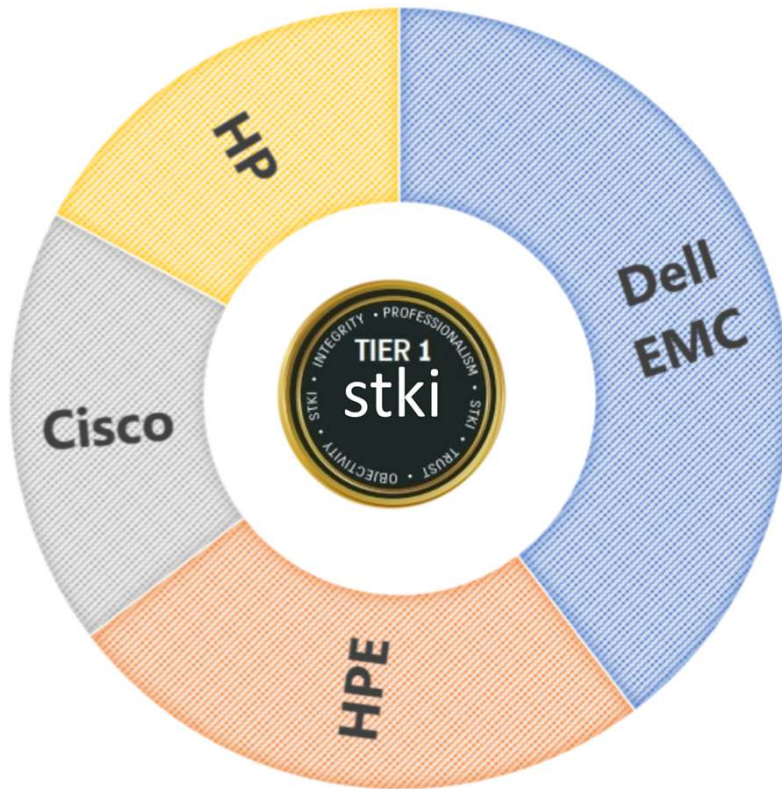
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TOP VENDORS: Hardware Markets

manufacturers

local VARS



STKI ranks VENDORS by REVENUE and CLIENT MINDSHARE

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hardware market

index:



servers

page: **24**



clients (PCs)
(commercial use only)

page: **37**



storage appliances

page: **46**



networking, VoIP,
security appliances

page: **55**



self-service &
data-center equipment

page: **69**



miscellaneous products

page: **76**



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hardware market

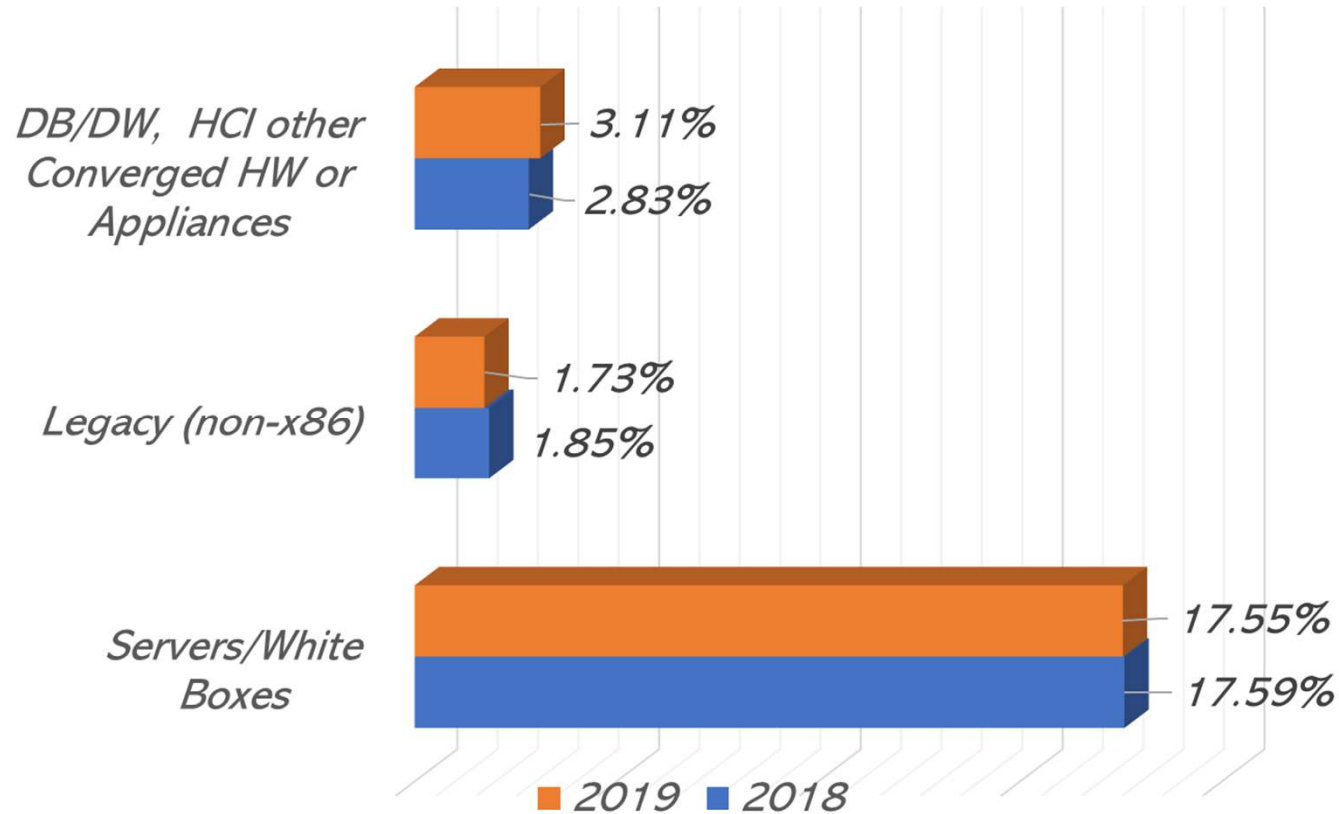


servers

Servers/White Boxes
Legacy (non-x86)
DB/DW, HCI other Converged HW or Appliances



Servers as a Percentage of Hardware Market



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hardware market

servers

	2018		2019		2020		2021
Servers/White Boxes	305,000	1.64%	310,000	1.61%	315,000	1.90%	321,000
Legacy (non-x86)	32,000	-4.69%	30,500	-14.75%	26,000	-15.38%	22,000
DB/DW, HCI other Converged HW or Appliances	49,000	12.24%	55,000	5.45%	58,000	12.07%	65,000
total	386,000	2.46%	395,500	0.88%	399,000	2.26%	408,000

FORECAST VERSION ONE

all amounts
in \$KUSD



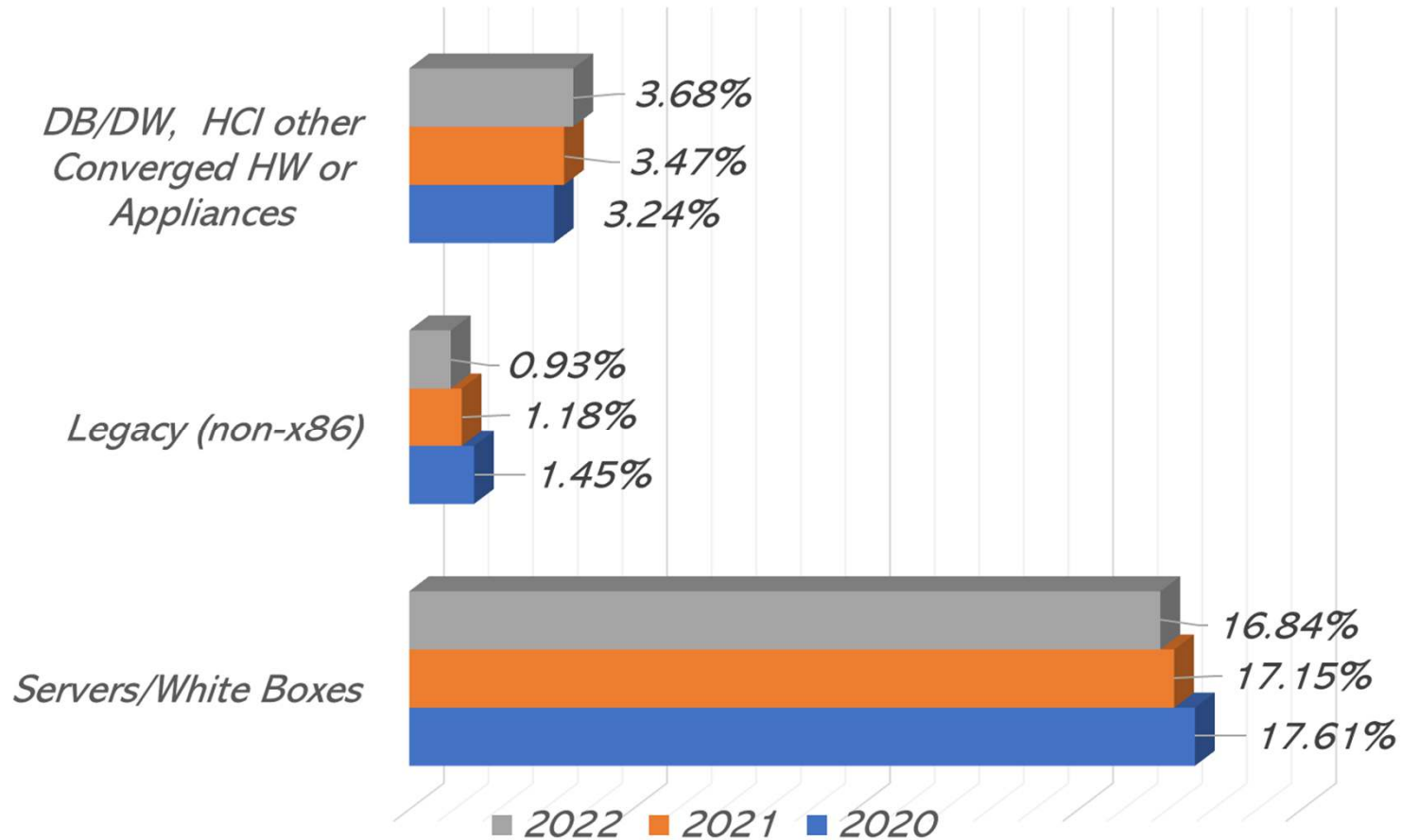
Forecast One



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Servers as a Percentage of Hardware Market



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hardware market

servers

	2019		2020		2021		2022
Servers/White Boxes	310,000	-6.45%	290,000	5.17%	305,000	6.56%	325,000
Legacy (non-x86)	30,500	-14.75%	26,000	-15.38%	22,000	-18.18%	18,000
DB/DW, HCI other Converged HW or Appliances	55,000	-12.73%	48,000	8.33%	52,000	25.00%	65,000
total	395,500	-7.96%	364,000	4.12%	379,000	7.65%	408,000

FORECAST VERSION TWO

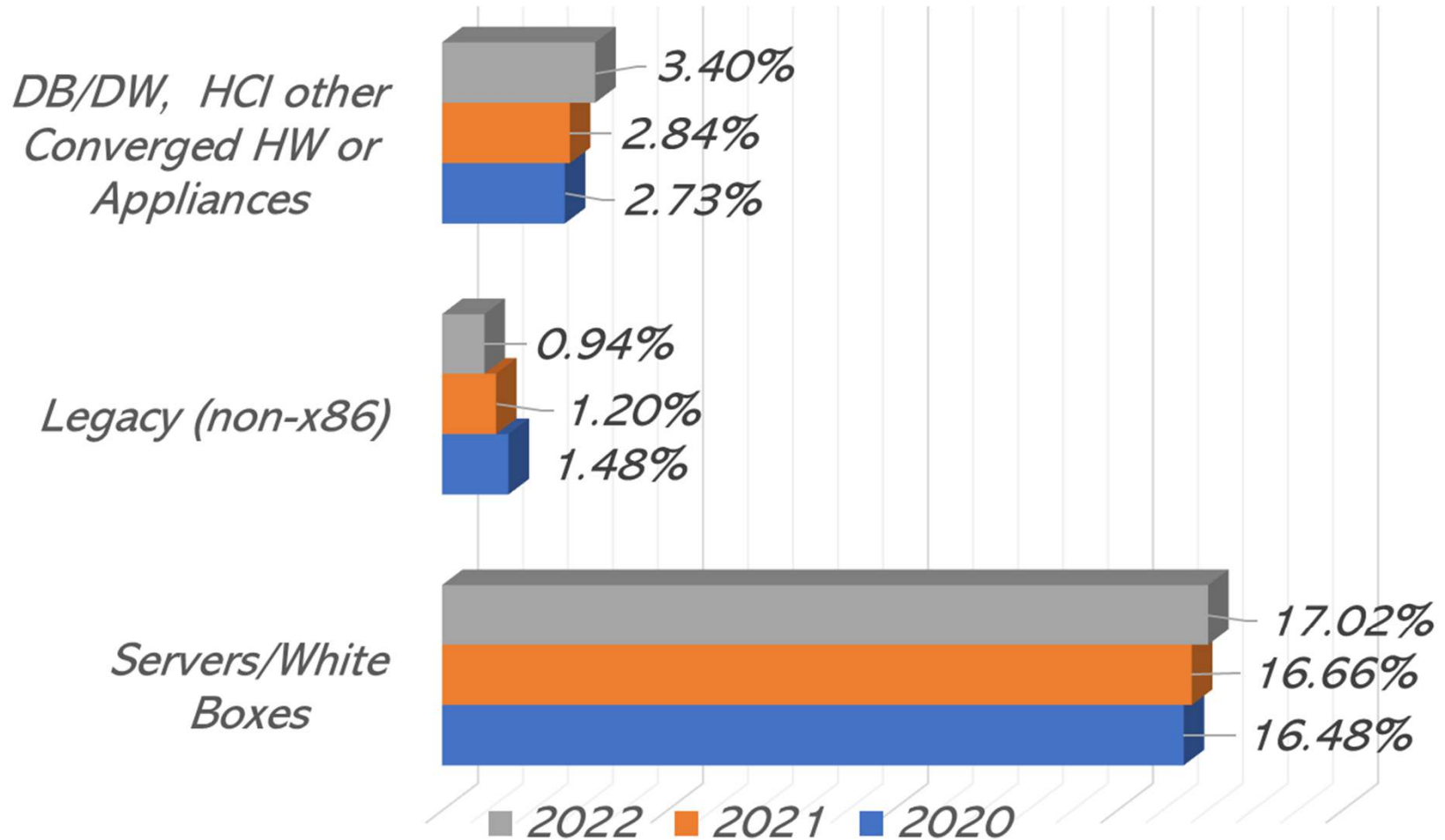
all amounts
in \$KUSD



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Servers as a Percentage of Hardware Market

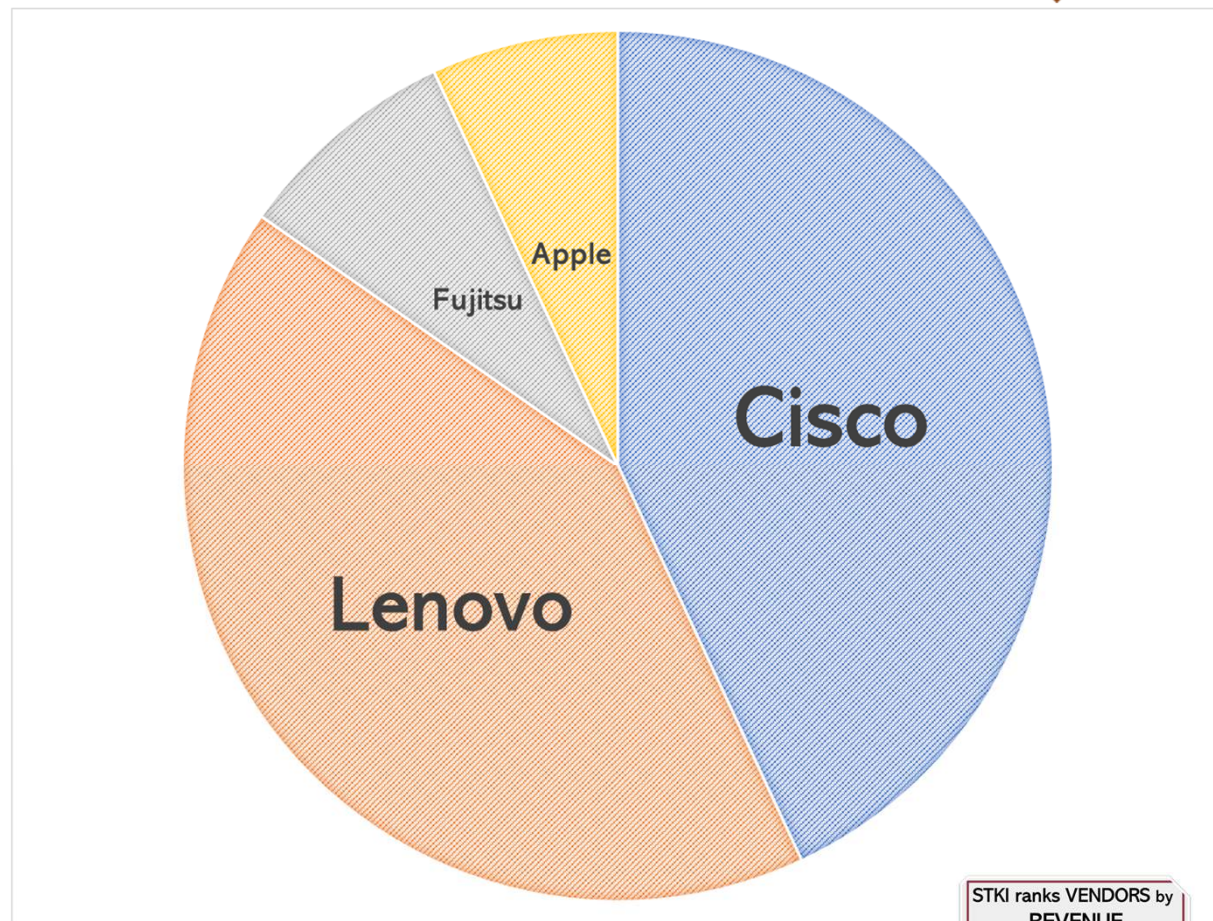
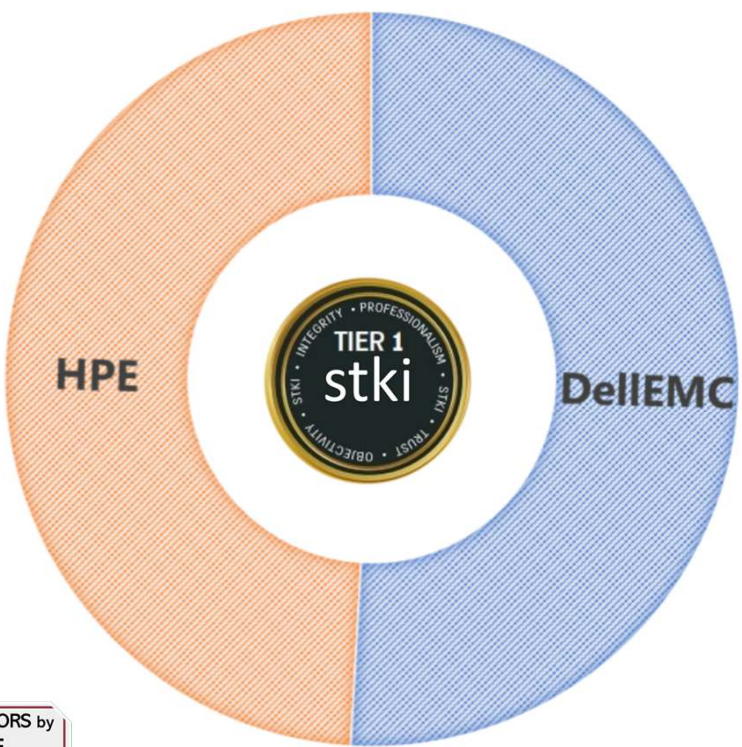


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Servers: manufacturers



STKI ranks VENDORS by REVENUE and CLIENT MINDSHARE



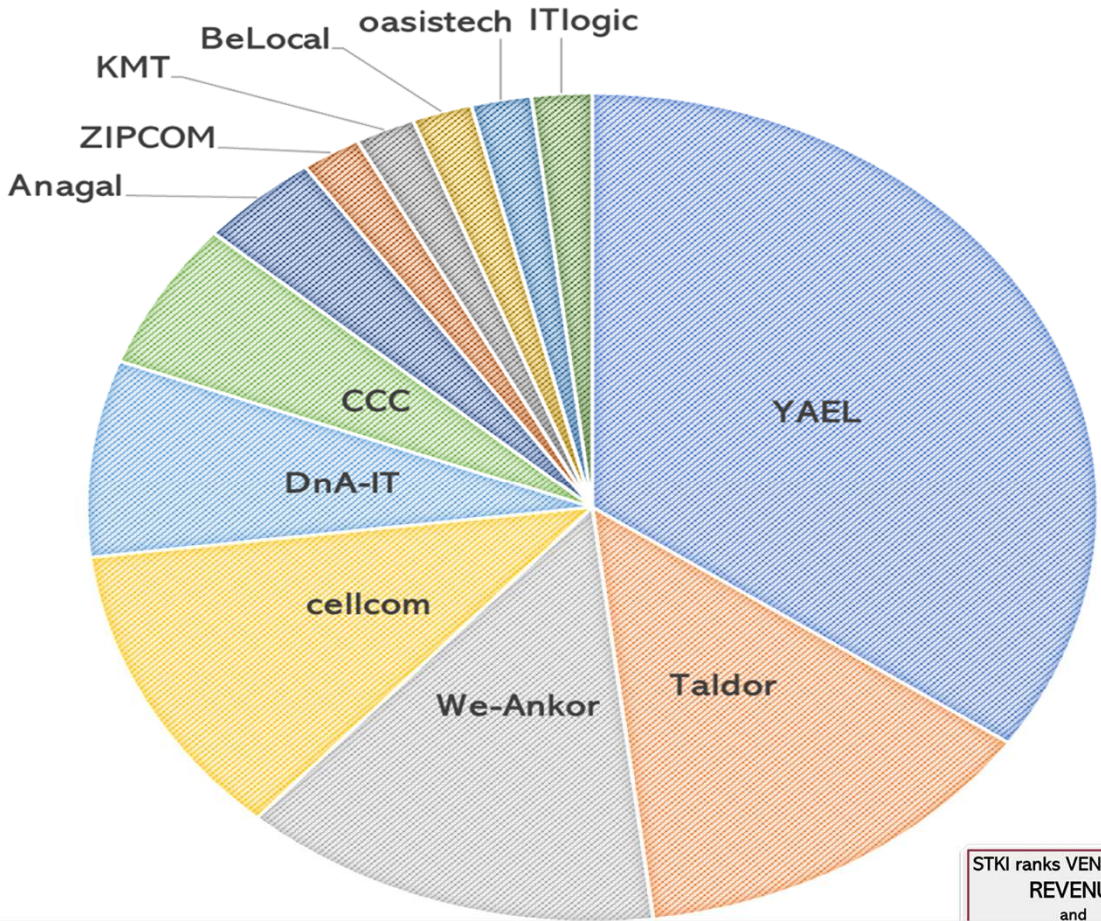
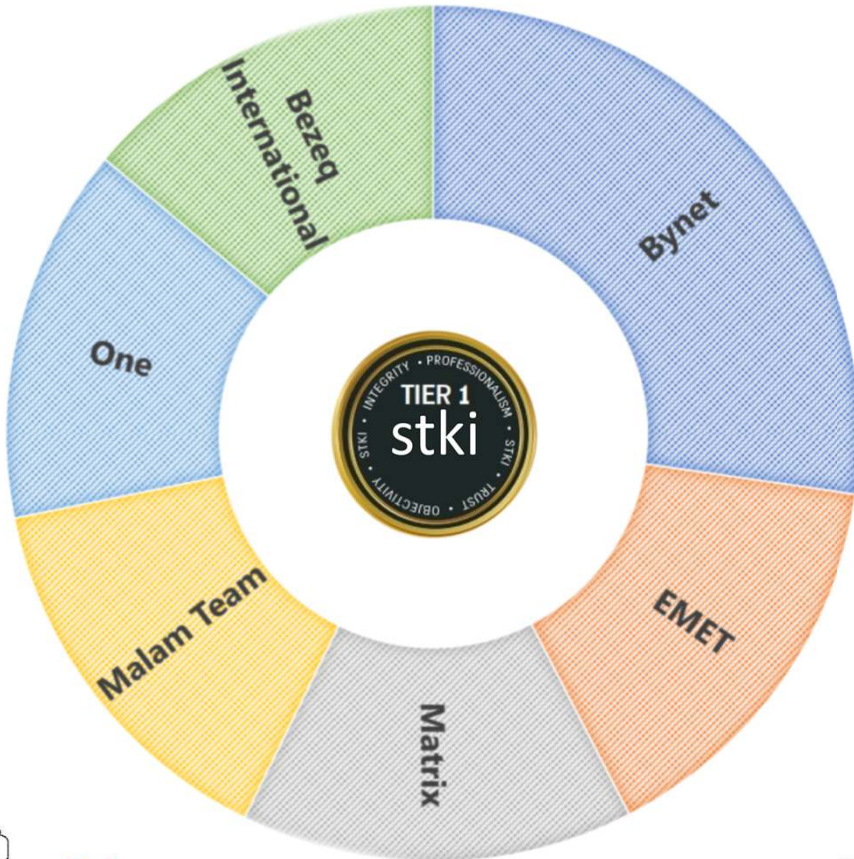
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Servers: VARS



hardware market



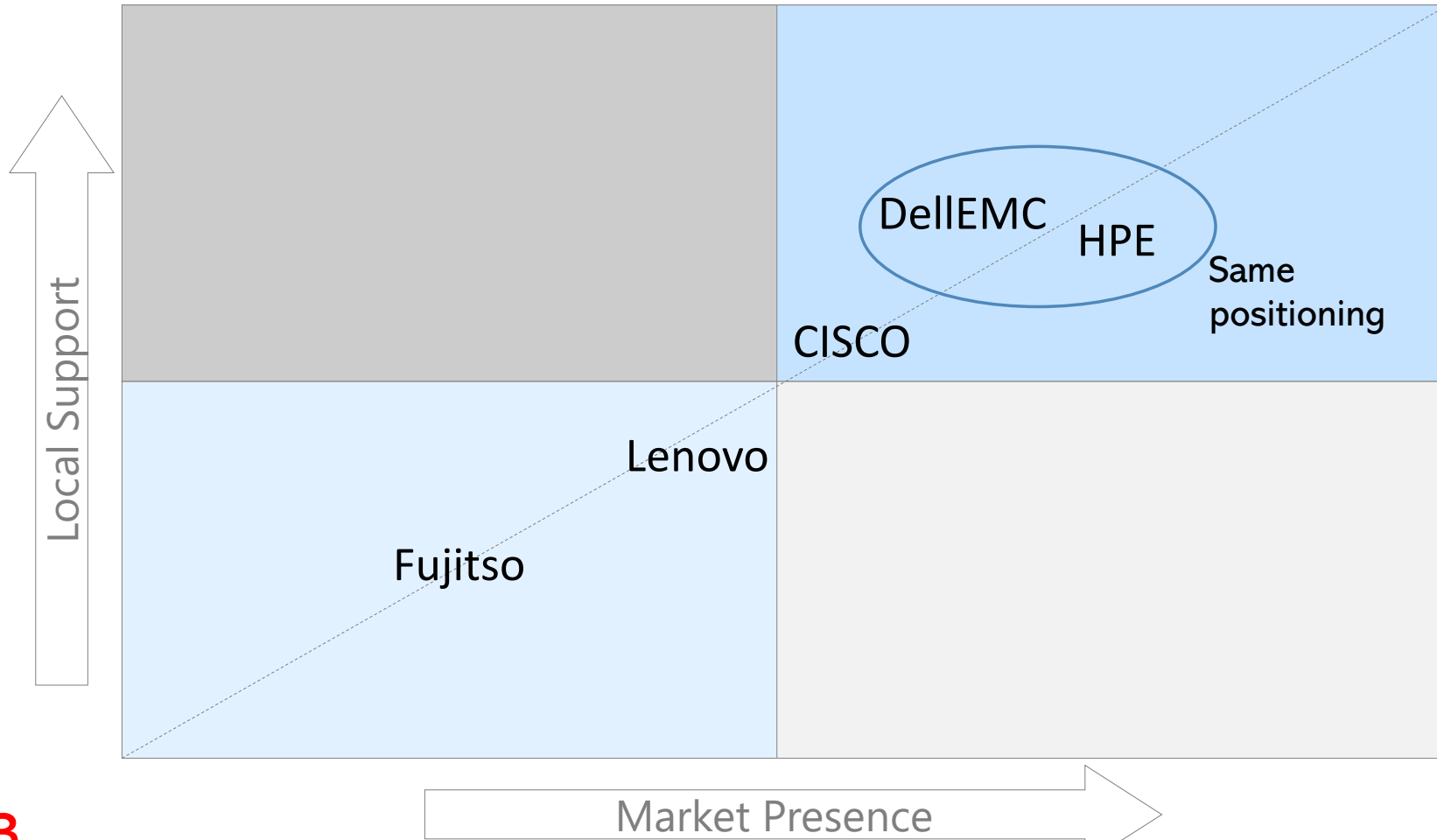
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General purpose intel servers enterprise market presence 1H20

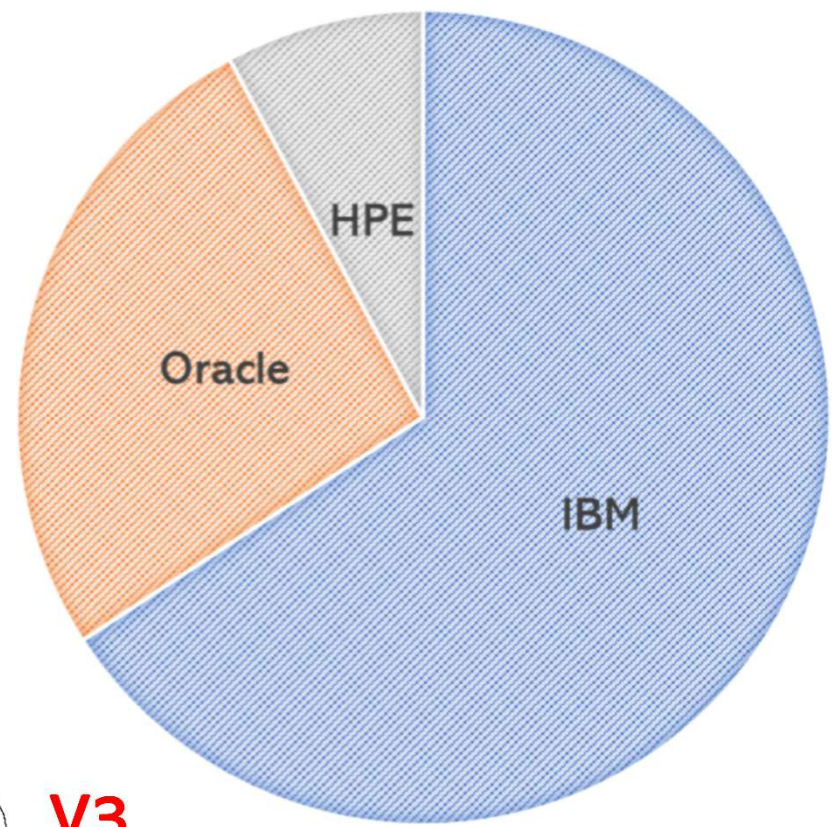


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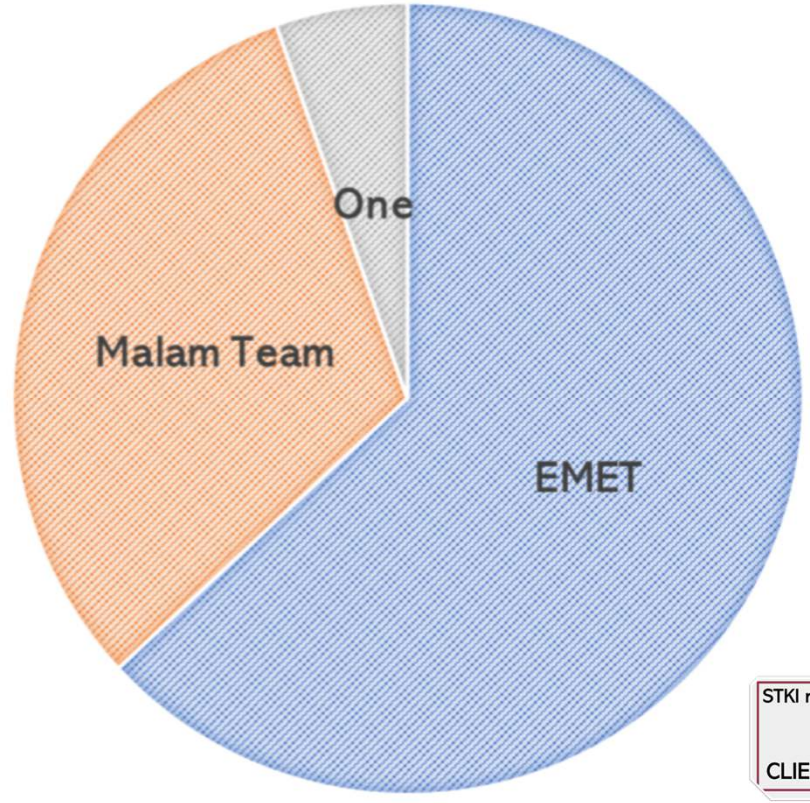


Servers: Legacy (non-x86)

manufacturers



local VARS



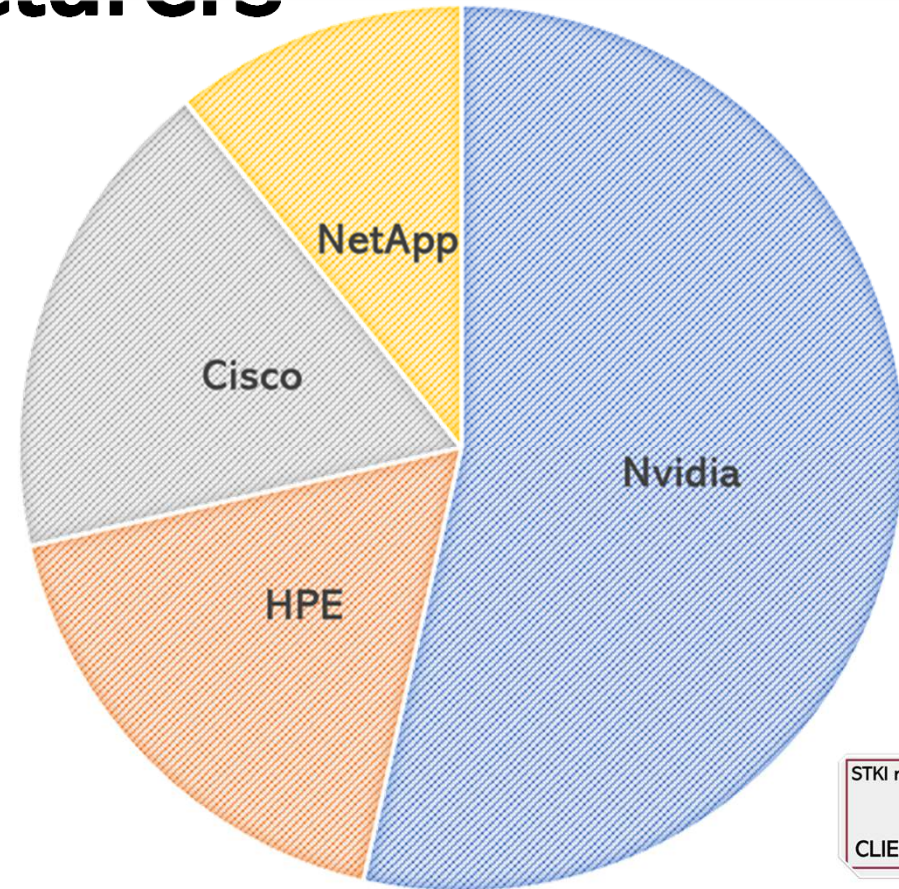
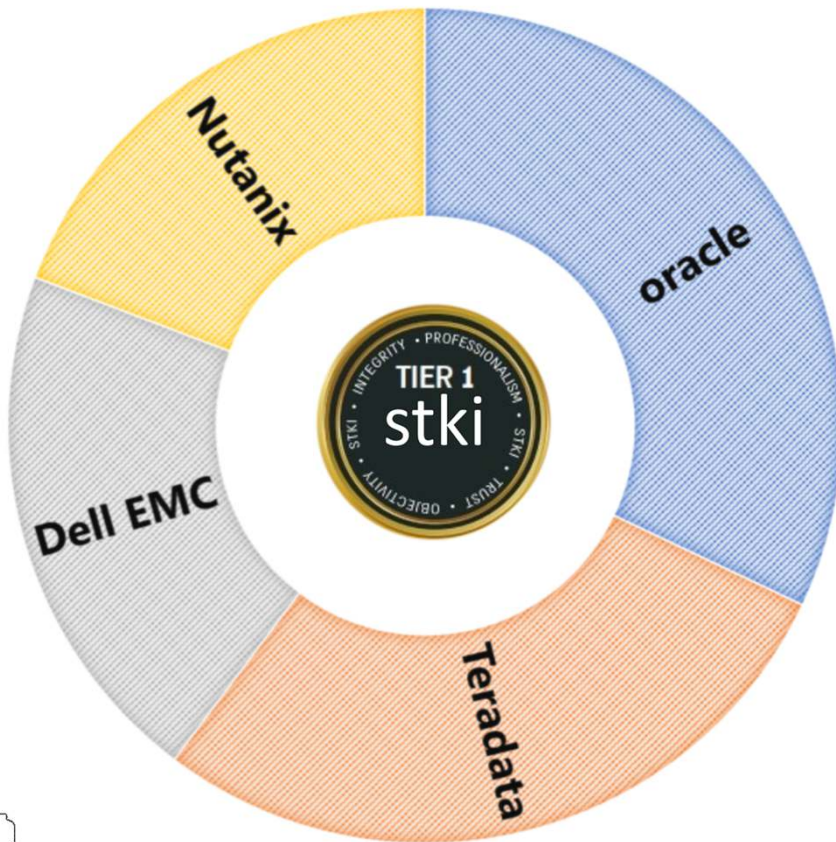
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Servers: DB/DW, Converged HW and Appliances manufacturers



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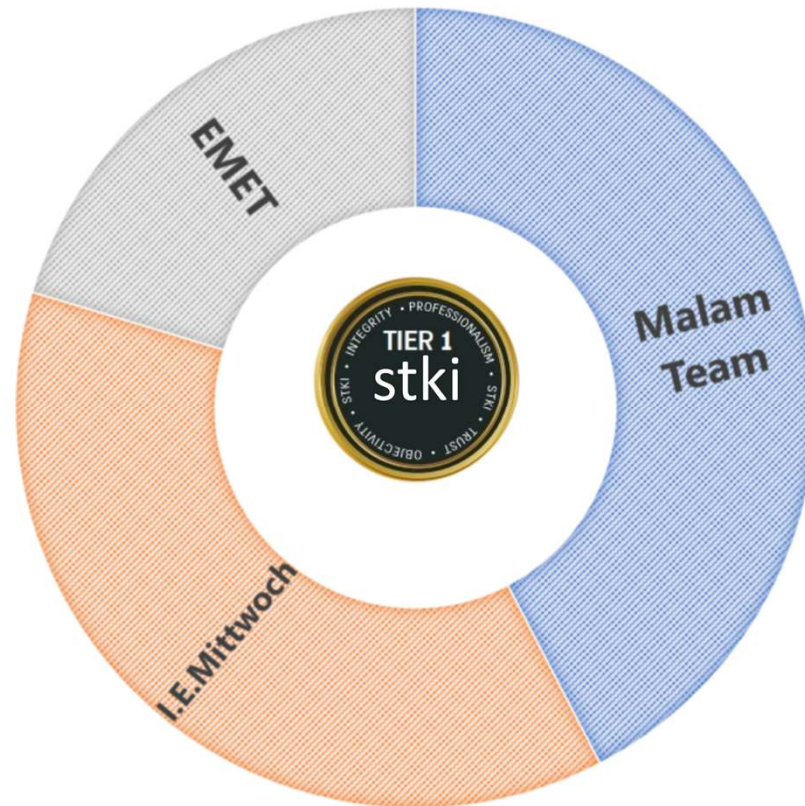


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Servers: DB/DW, Converged HW and Appliances

VARs



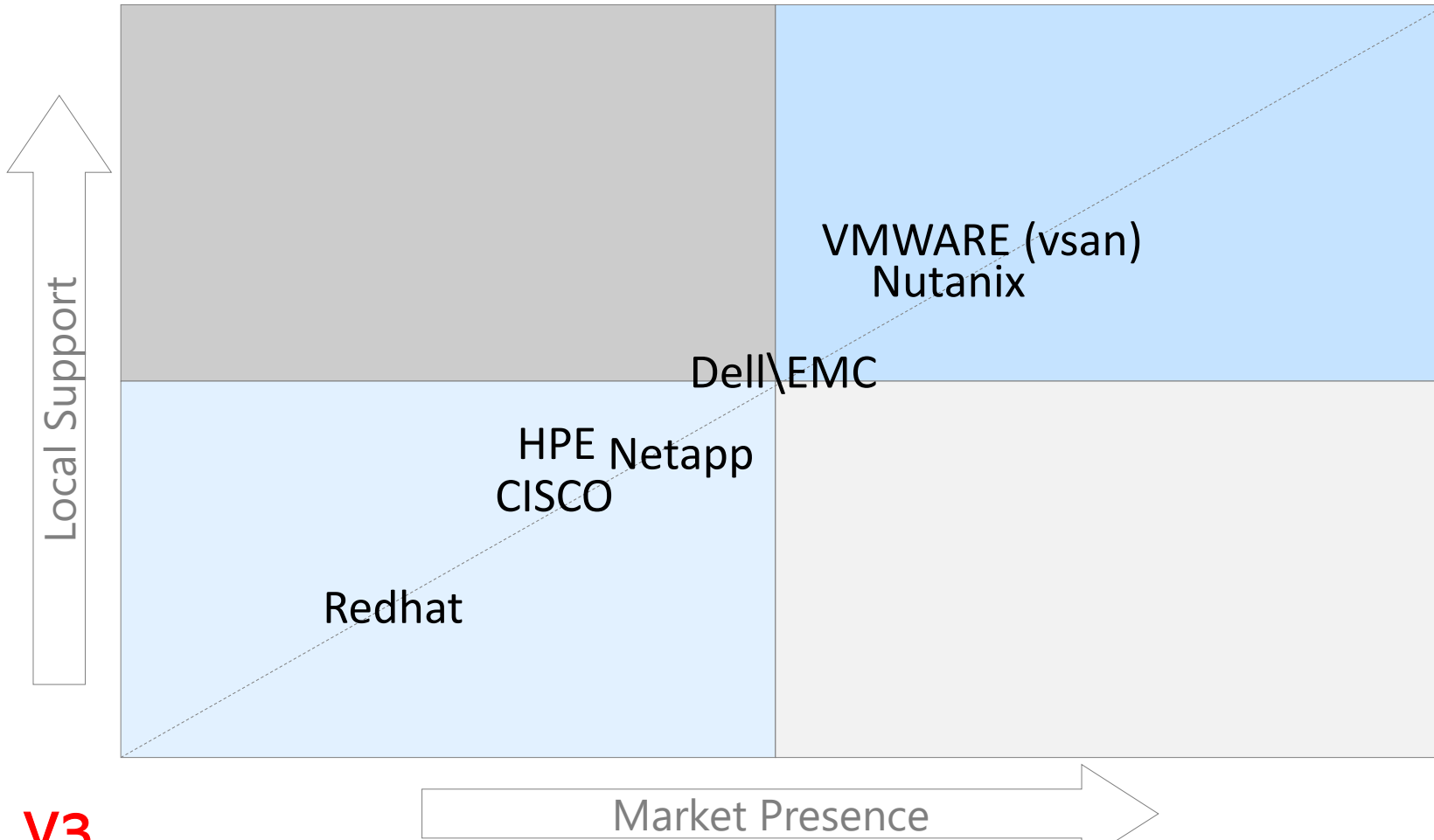
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HCI Hyper Converged Infrastructure enterprise market presence 1H20



Brands in HCI – SW, HW appliances (not “apples to apples”) the “leading brand” in the solution is listed



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Clients (PCs) (commercial use only)

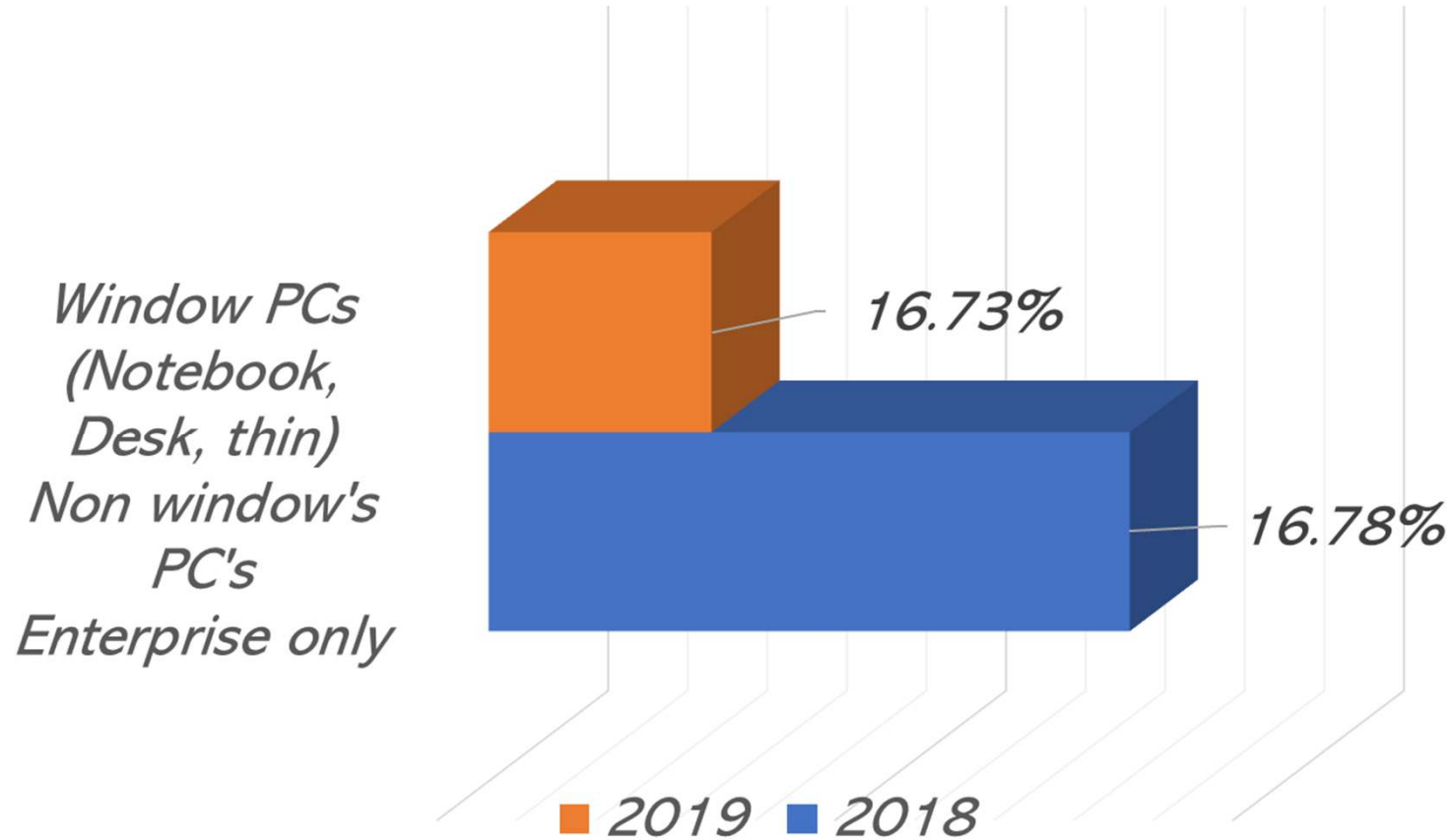


Window PCs (Notebook, Desk, thin)
Non window's PC's
Enterprise only



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Clients (PCs) as a Percentage of Hardware Market



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Clients (PCs) (commercial use only)

	2018		2019		2020		2021
Window PCs (Notebook, Desk, thin)	291,000	1.55%	295,500	1.18%	299,000	1.00%	302,000
Non window's PC's Enterprise only							
total	291,000	1.55%	295,500	1.18%	299,000	1.00%	302,000

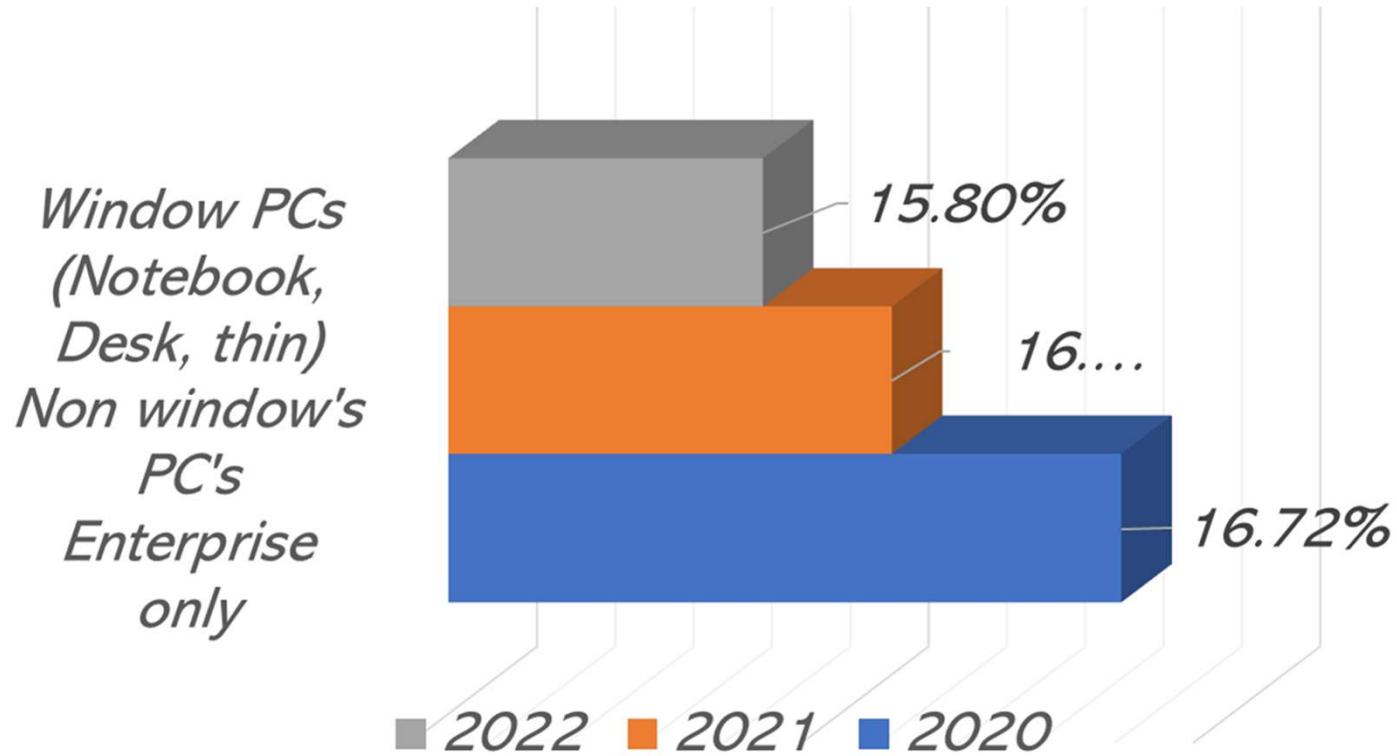
FORECAST VERSION ONE

all amounts
in \$KUSD



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Clients (PCs) as a Percentage of Hardware Market



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Clients (PCs) (commercial use only)

	2019		2020		2021		2022
Window PCs (Notebook, Desk, thin)	295,500	6.60%	315,000	-4.13%	302,000	0.99%	305,000
Non window's PC's							
Enterprise only							
total	295,500	6.60%	315,000	-4.13%	302,000	0.99%	305,000

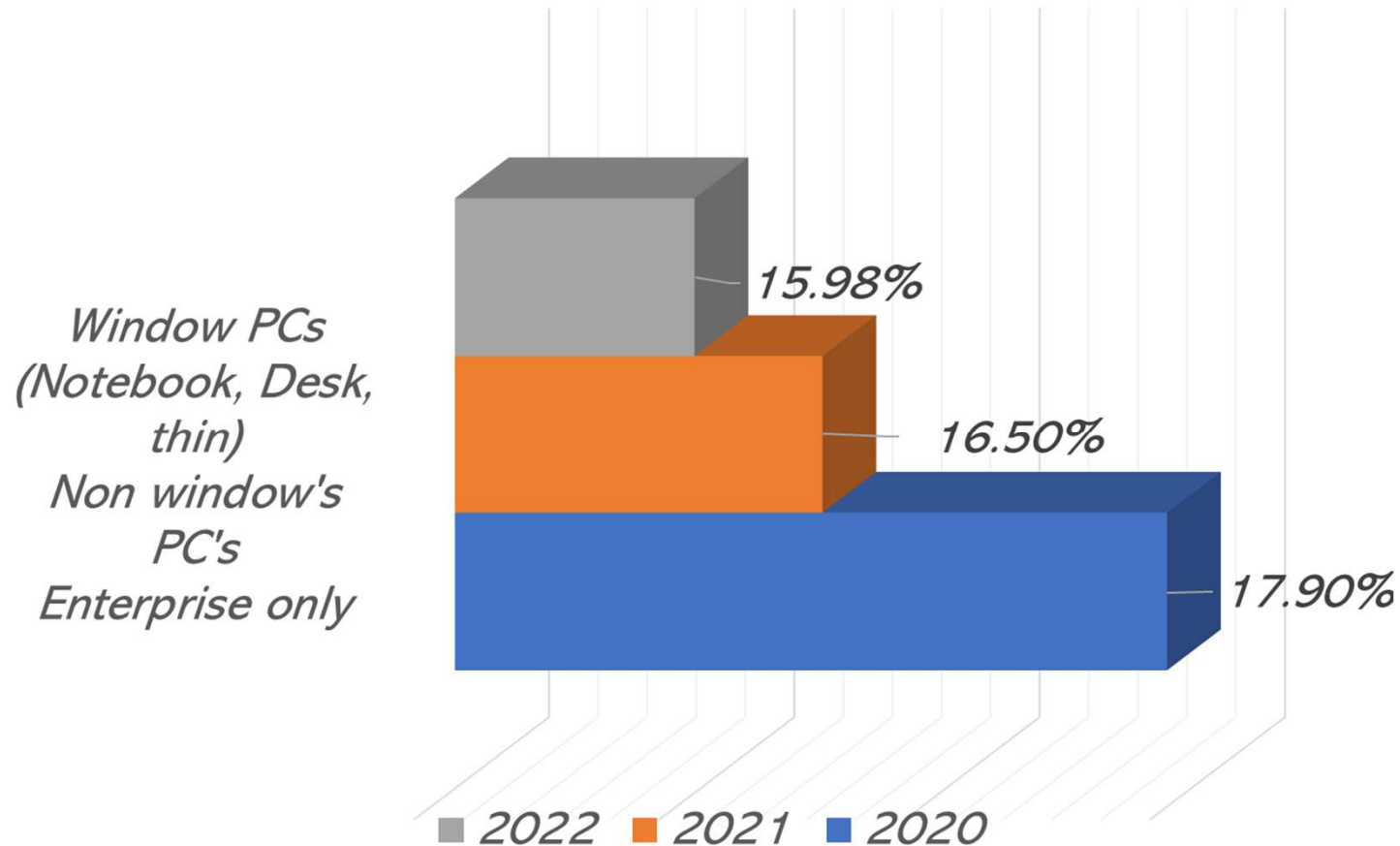
FORECAST VERSION TWO

all amounts
in \$KUSD



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Clients (PCs) as a Percentage of Hardware Market

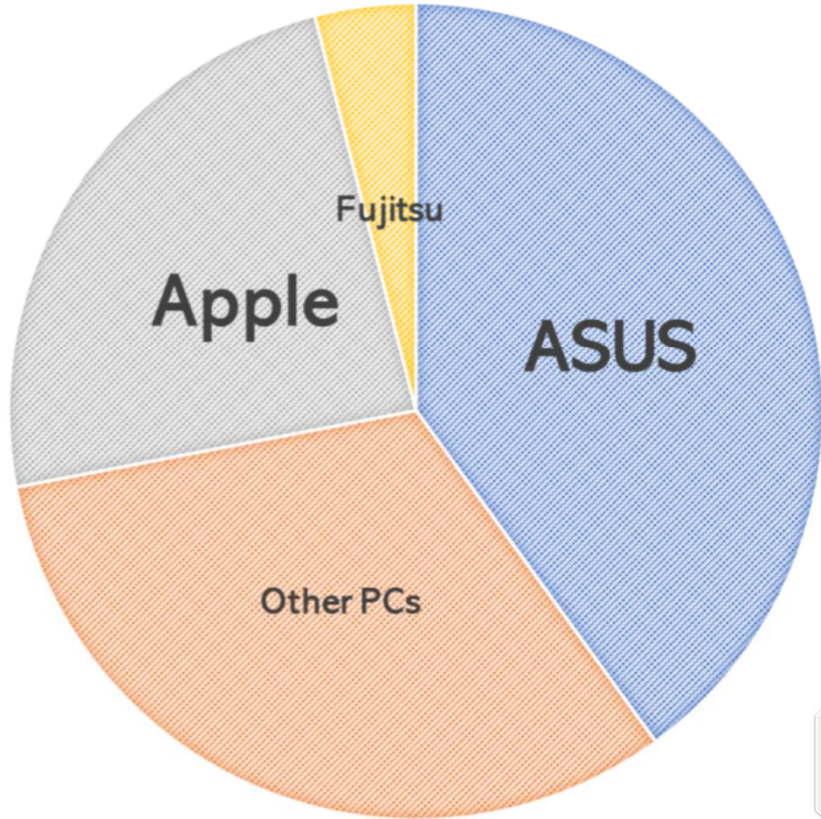


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Clients (PCs) (commercial use only) manufacturers



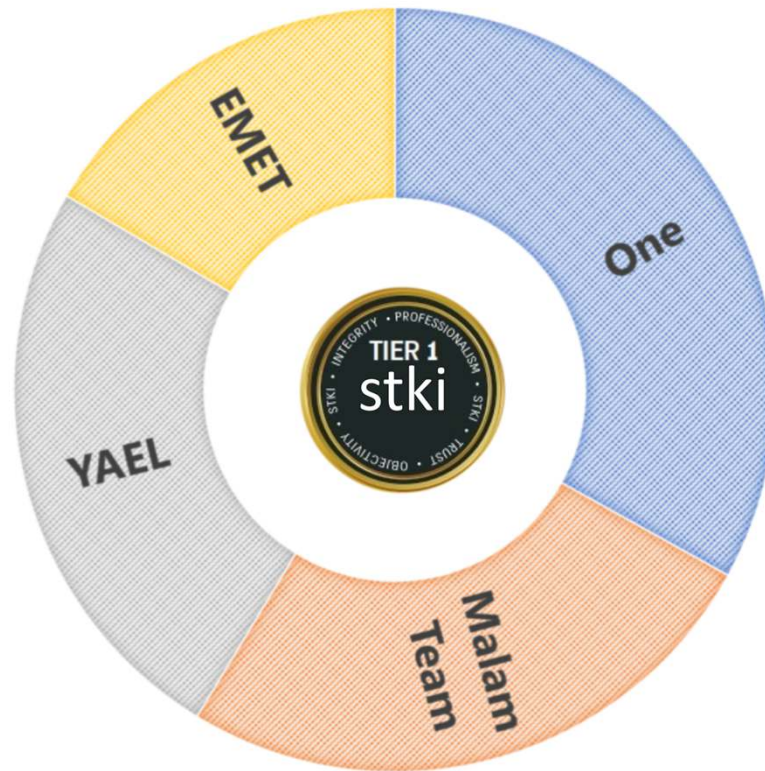
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Clients (PCs) (commercial use only) VARs



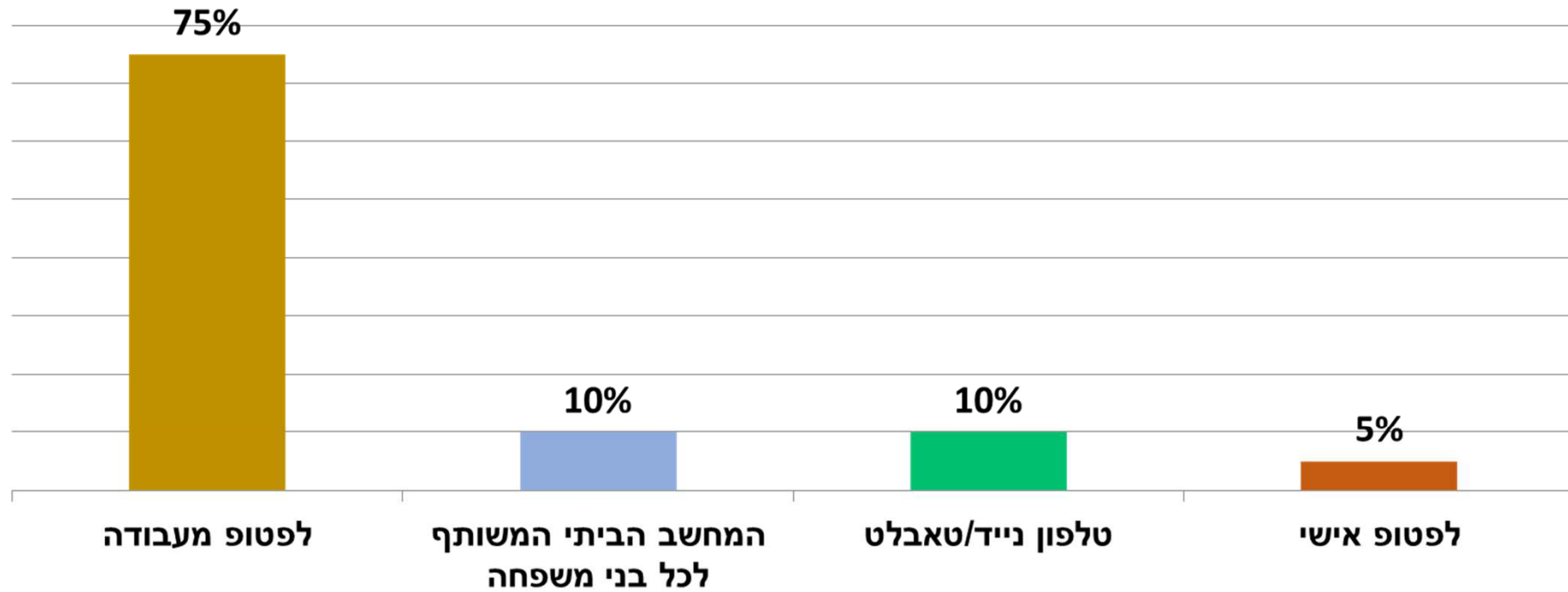
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באמצעות איזה מכשיר את/ה עובד/ת מהבית בתקופה זו:



המקור: סקר שוק ישראלי בצל משבר הקורונה
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Storage Appliances Market

Disks (HHD and SSD)
VTL Backup and other storage
Appliances
Tape Libraries
Enterprise Storage

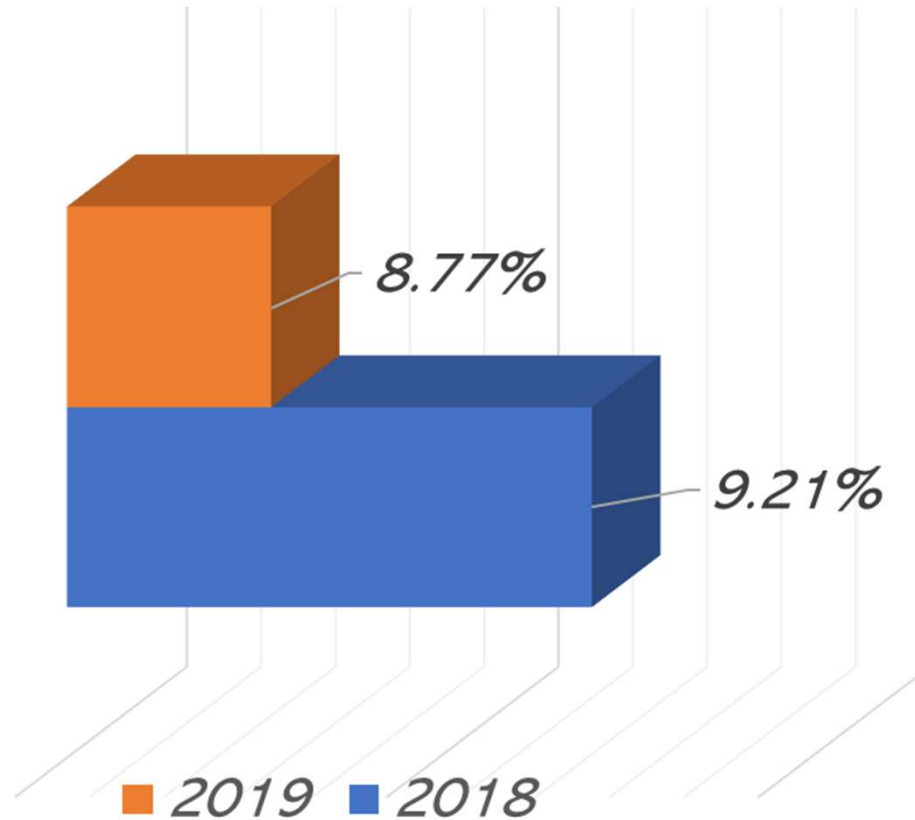


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Storage Appliances as a Percentage of Hardware Market



*Disks (HHD and SSD)
VTL Backup and other storage
Appliances
Tape Libraries
Enterprise Storage*



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storage appliances

	2018		2019		2020		2021
Disks (HHD and SSD)							
VTL Backup and other storage							
Appliances	159,650	-2.91%	155,000	-2.68%	150,850	2.09%	154,000
Tape Libraries							
Enterprise Storage							
total	159,650	-2.91%	155,000	-2.68%	150,850	2.09%	154,000

FORECAST VERSION ONE

all amounts
in \$KUSD

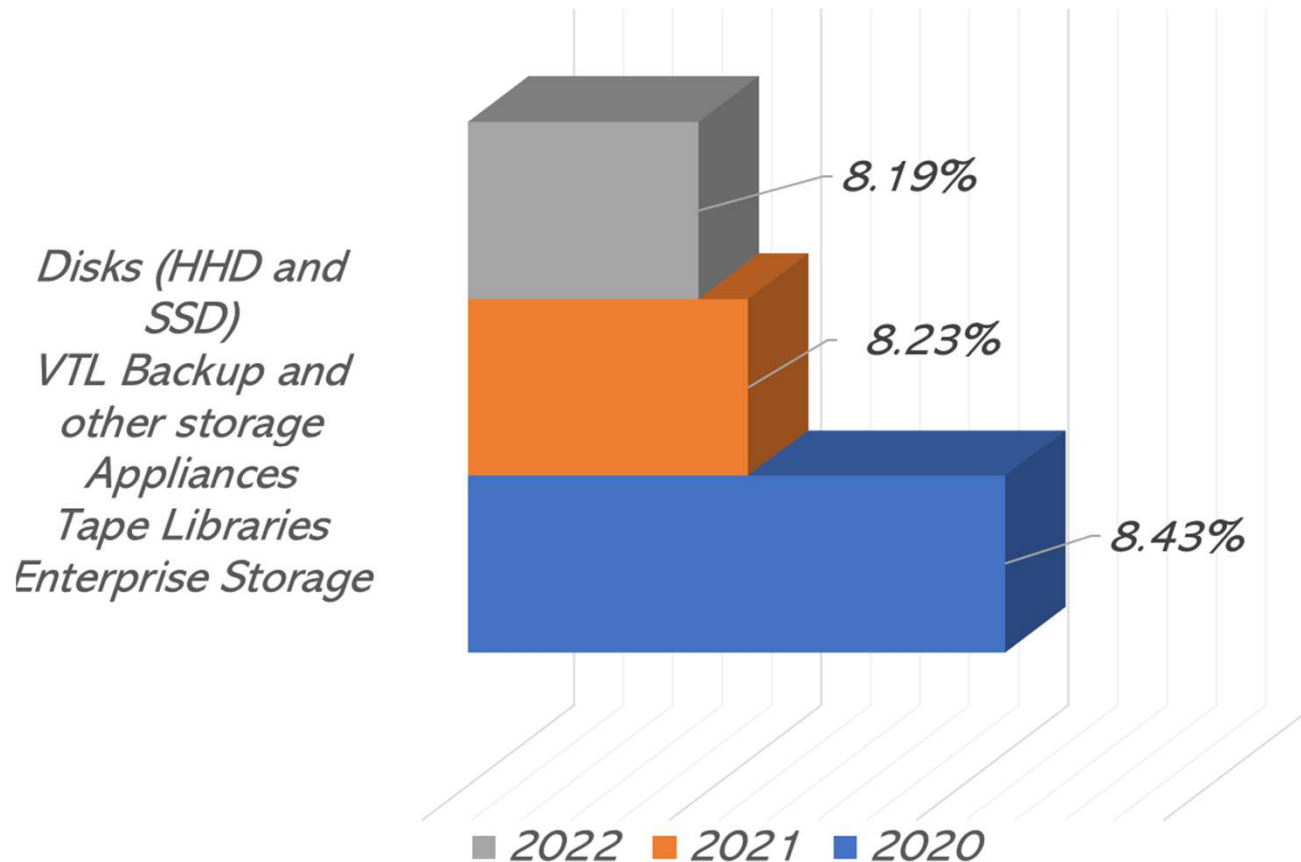


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Storage Appliances as a Percentage of Hardware Market

50



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storage appliances

	2019		2020		2021		2022
Disks (HHD and SSD) VTL Backup and other storage Appliances Tape Libraries Enterprise Storage	155,000	-16.13%	130,000	13.85%	148,000	6.76%	158,000
total	155,000	-16.13%	130,000	13.85%	148,000	6.76%	158,000

FORECAST VERSION TWO

all amounts
in \$KUSD

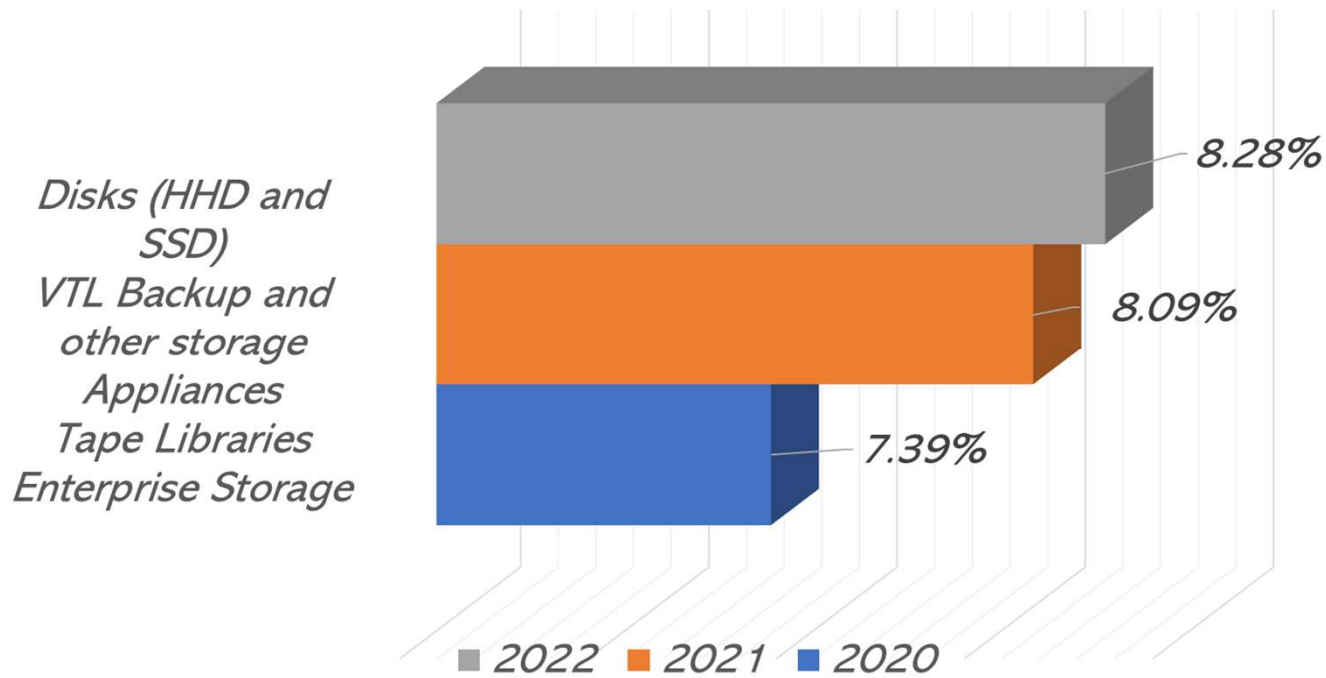


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Storage Appliances as a Percentage of Hardware Market

52

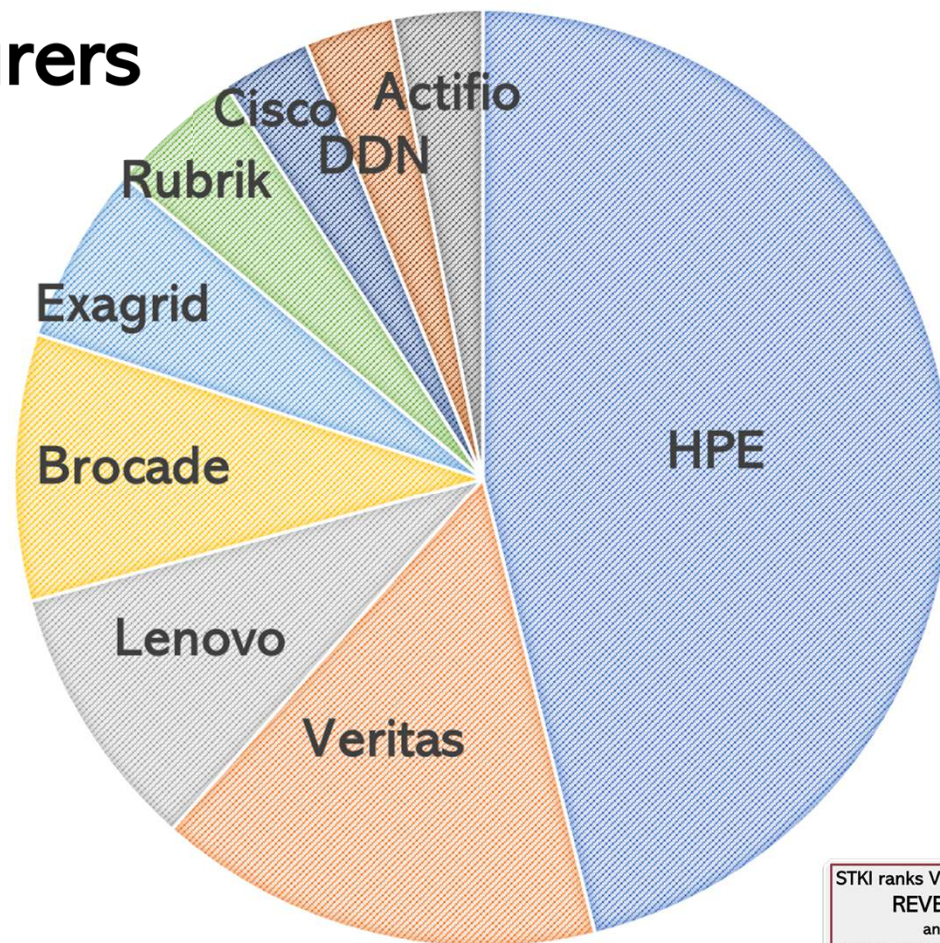
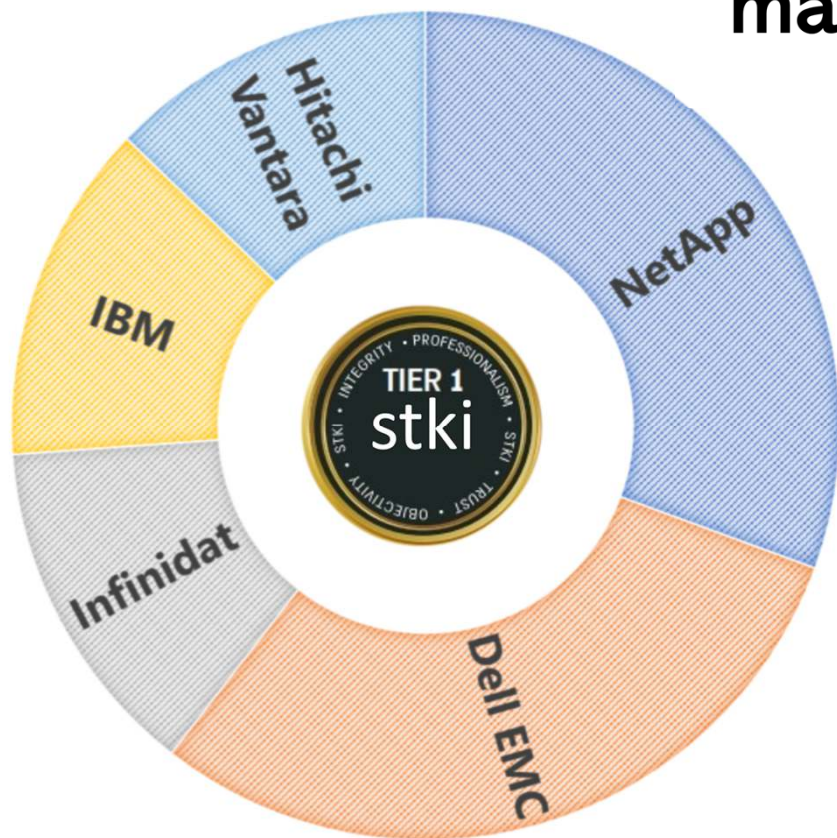


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Enterprise Storage HW (Drives, VTL's, Tapes, Storage Networking)

manufacturers



STKI ranks VENDORS by REVENUE and CLIENT MINDSHARE

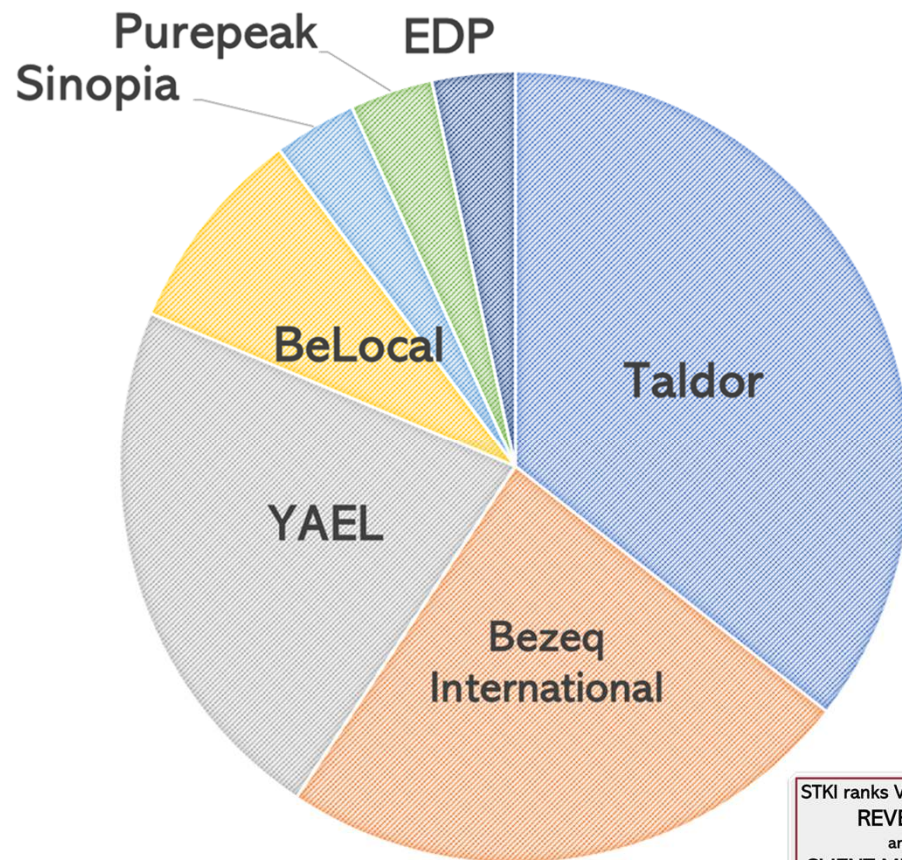
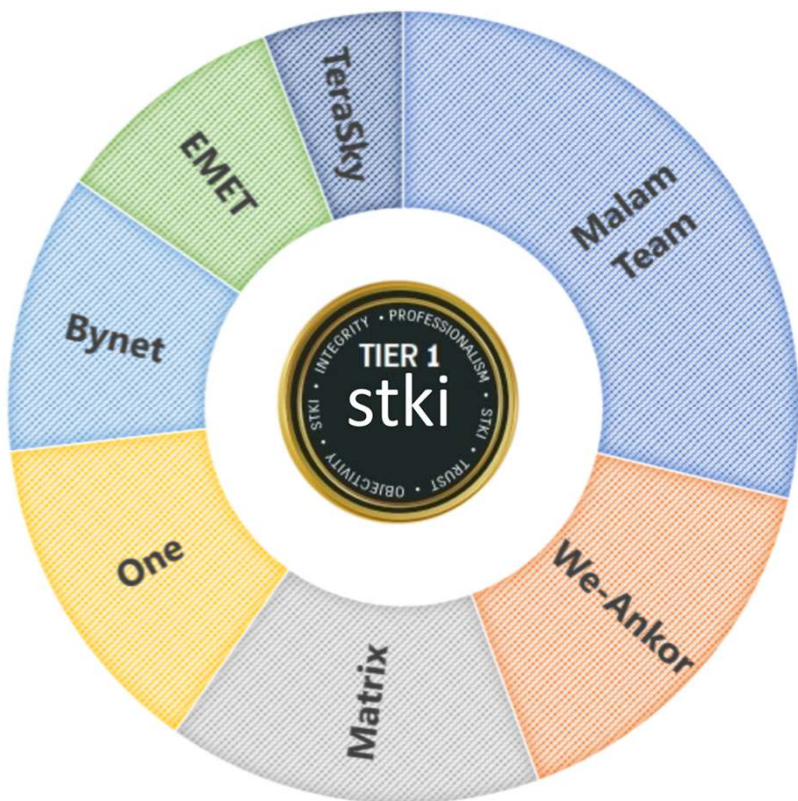


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Enterprise Storage HW (Drives, VTL's, Tapes, Storage Networking)

VARs

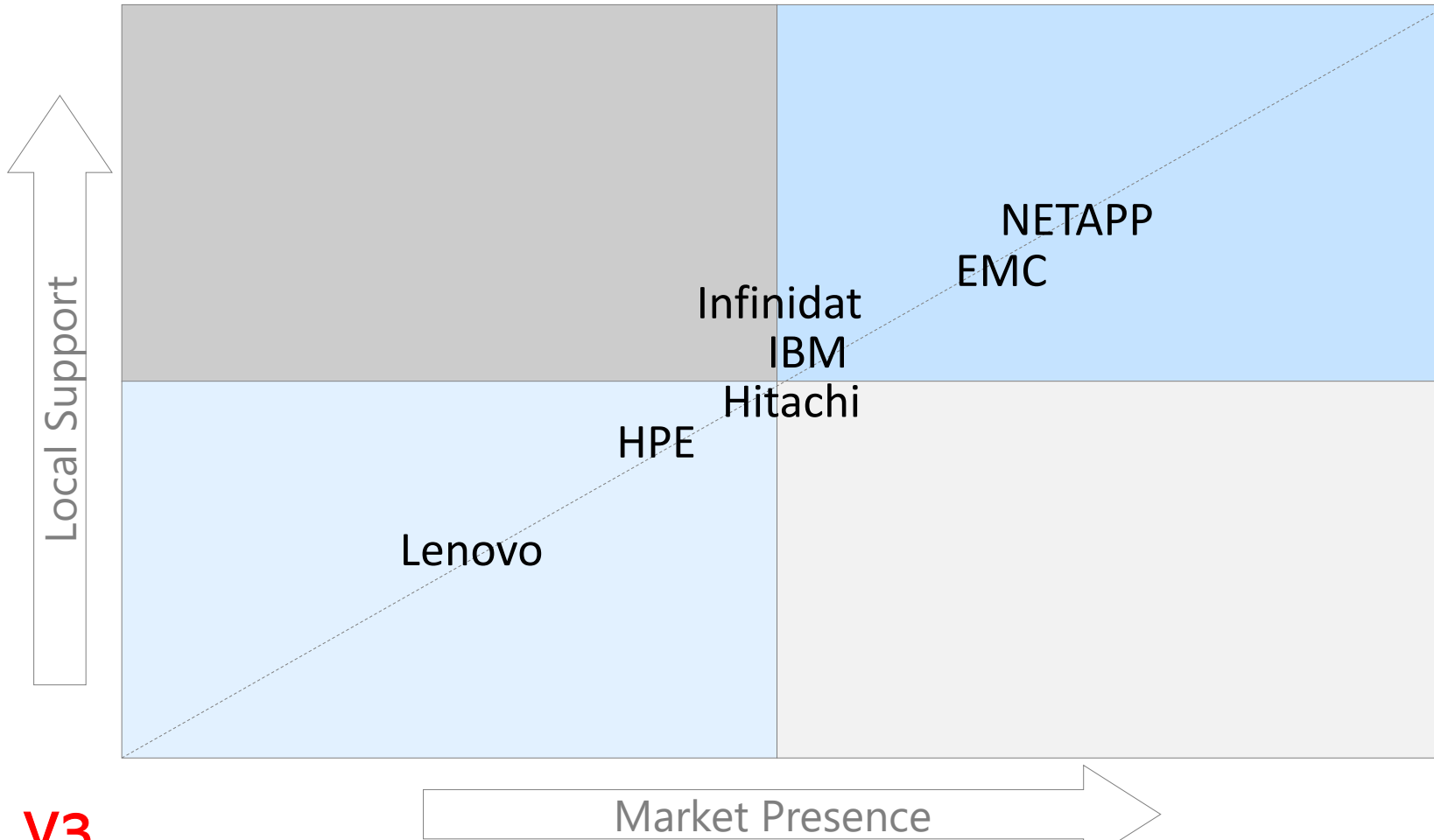


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general purpose storage HW enterprise market presence 1H20



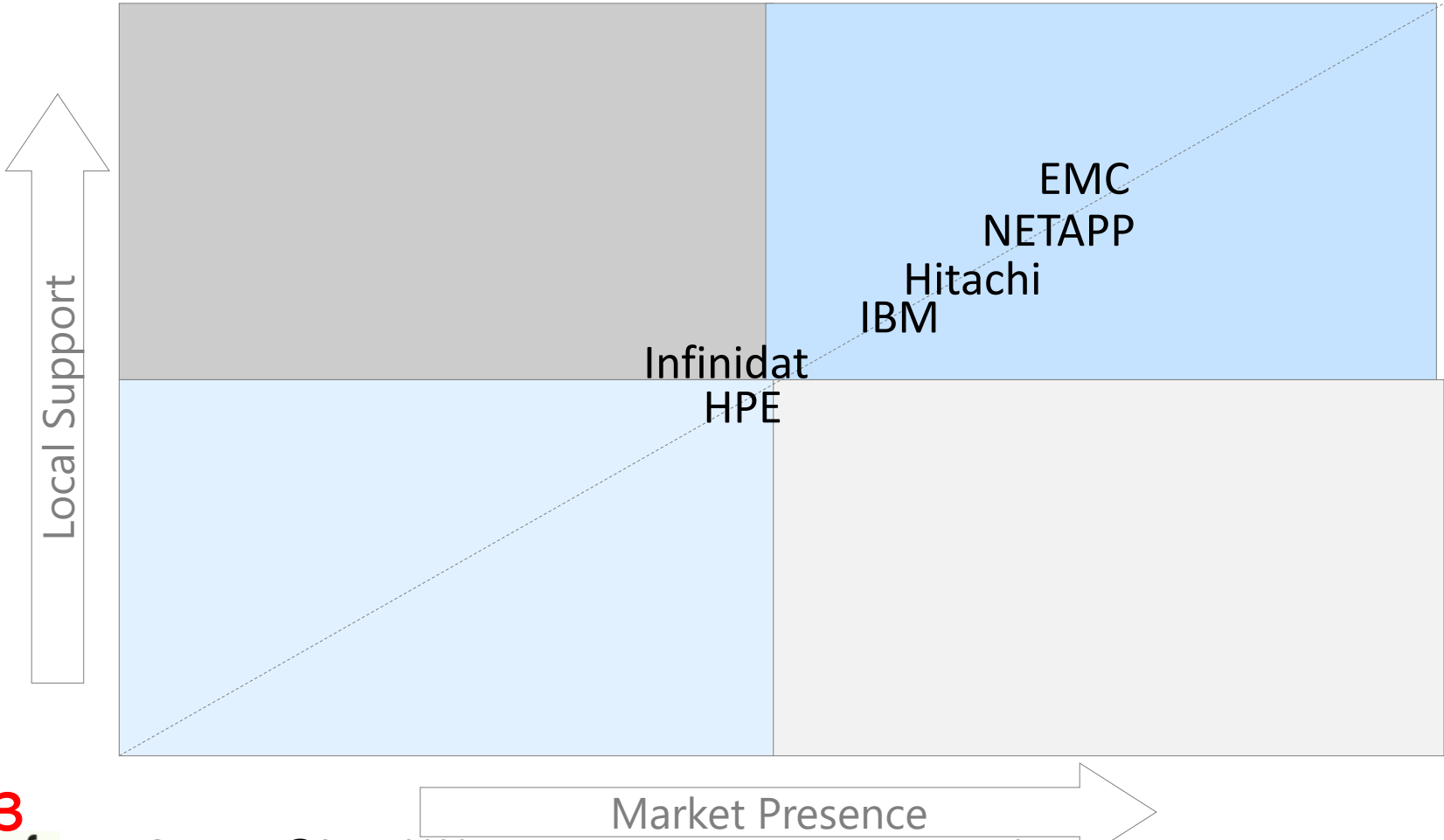
The fact that one vendor is located next to another doesn't mean they are similar in terms of functionality/technology.



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high end (critical systems storage) enterprise market presence 1H20



The fact that one vendor is located next to another doesn't mean they are similar in terms of functionality/ technology.



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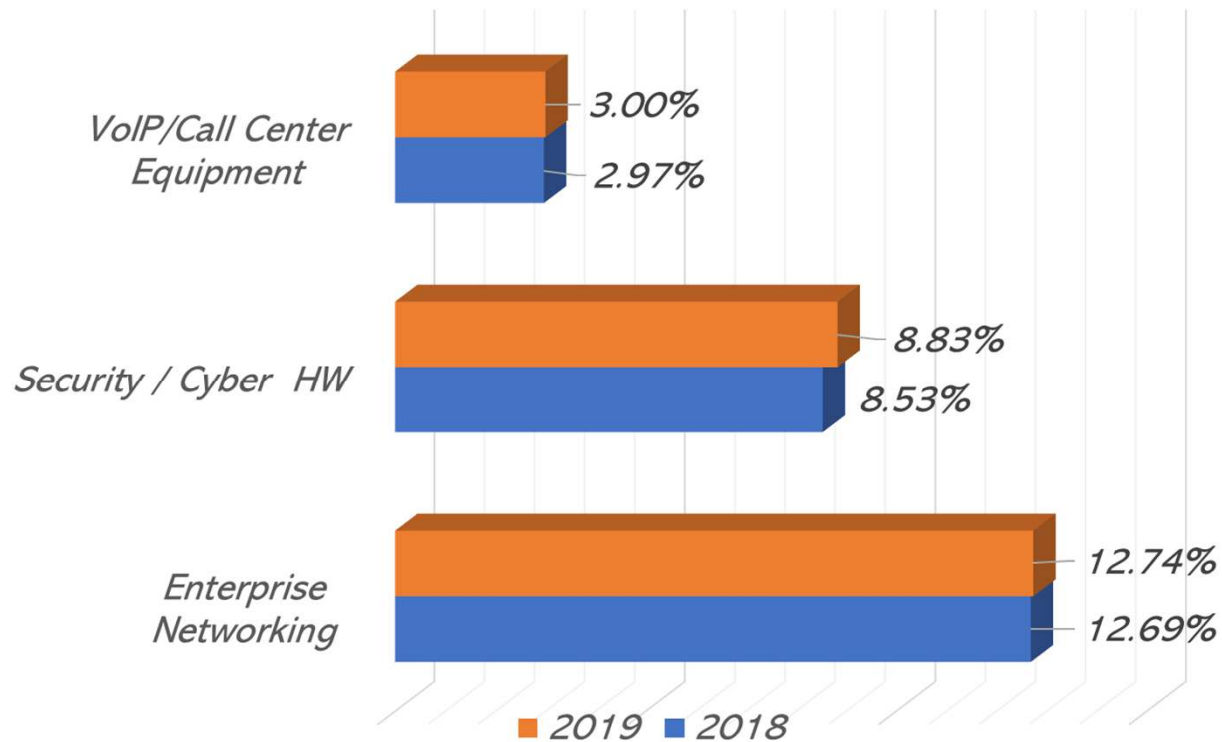
Networking, VoIP, Security Appliances

- Enterprise Networking
- Security / Cyber HW
- VoIP/Call Center Equipment



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Networking, VoIP, Security Appliances as a Percentage of Hardware Market



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Networking, VoIP, Security Appliances



	2018		2019		2020		2021
Enterprise Networking	220,000	2.27%	225,000	0.89%	227,000	5.95%	240,500
Security / Cyber HW	148,000	5.41%	156,000	3.85%	162,000	2.47%	166,000
VoIP/Call Center Equipment	51,500	2.91%	53,000	2.08%	54,100	4.44%	56,500
total	419,500	3.46%	434,000	2.10%	443,100	4.49%	463,000

FORECAST VERSION ONE

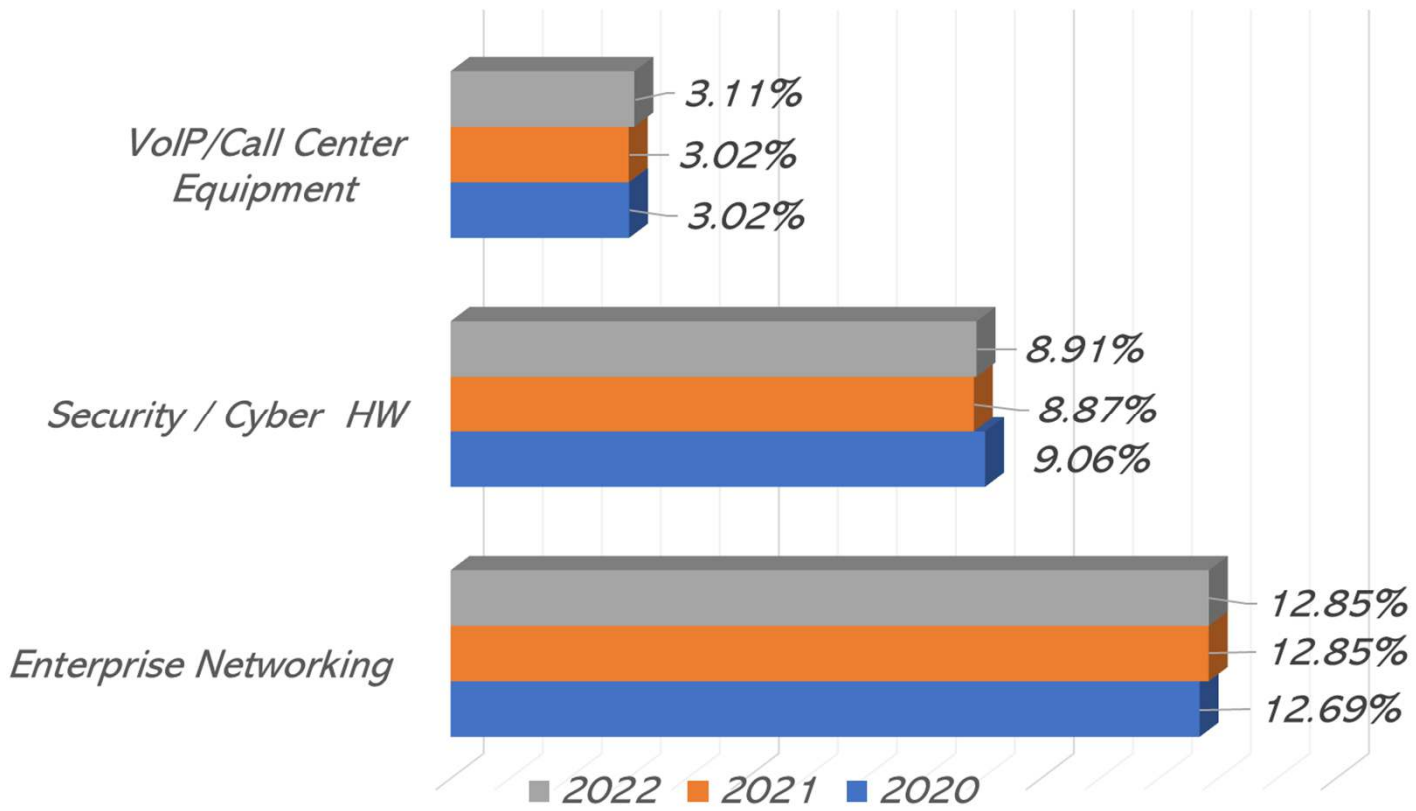
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Networking, VoIP, Security Appliances as a Percentage of Hardware Market



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Networking, VoIP, Security Appliances

	2019		2020		2021		2022
Enterprise Networking	225,000	0.89%	227,000	5.95%	240,500	3.12%	248,000
Security / Cyber HW	156,000	3.85%	162,000	2.47%	166,000	3.61%	172,000
VoIP/Call Center Equipment	53,000	16.98%	62,000	20.97%	75,000	10.67%	83,000
total	434,000	3.92%	451,000	6.76%	481,500	4.47%	503,000

FORECAST VERSION TWO

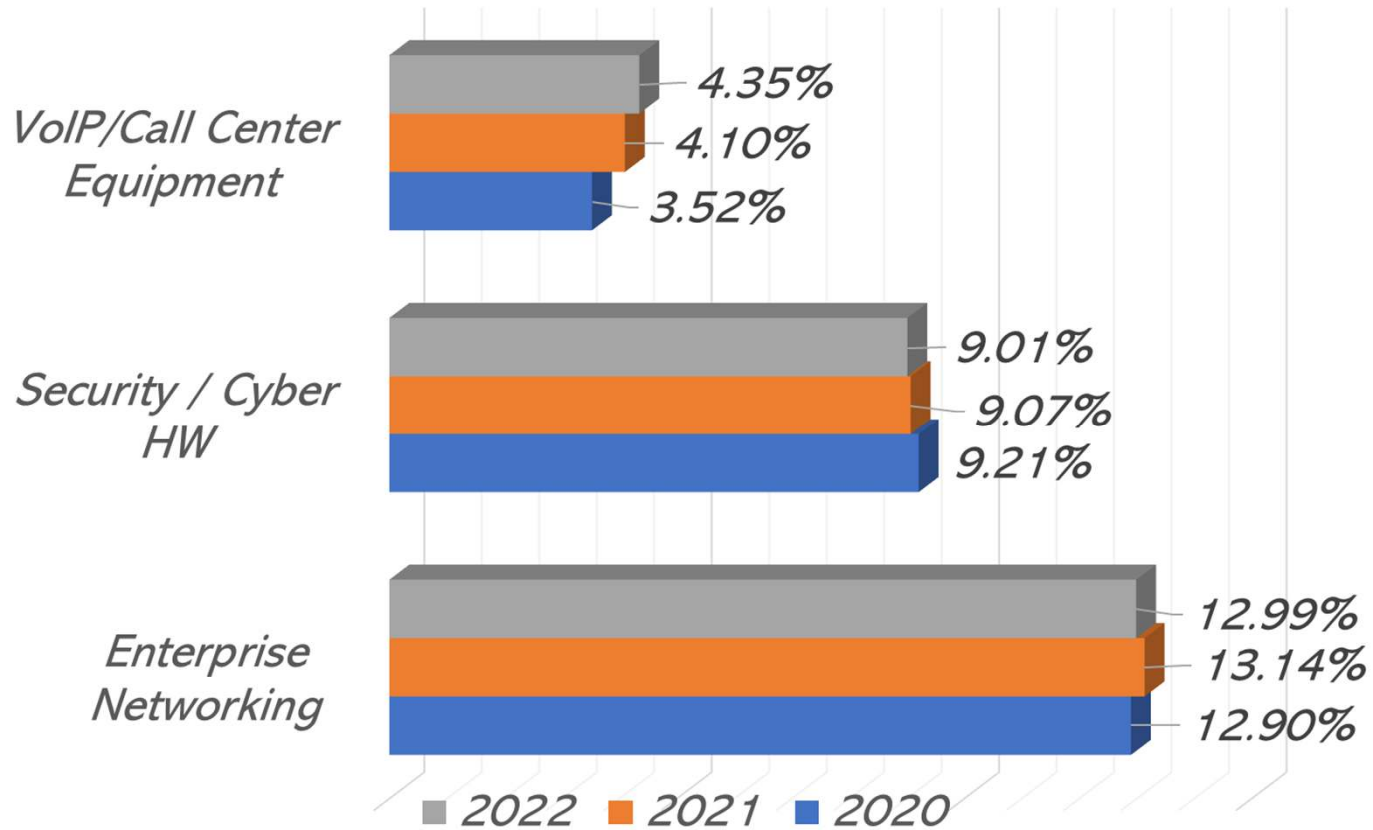
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Networking, VoIP, Security Appliances as a Percentage of Hardware Market

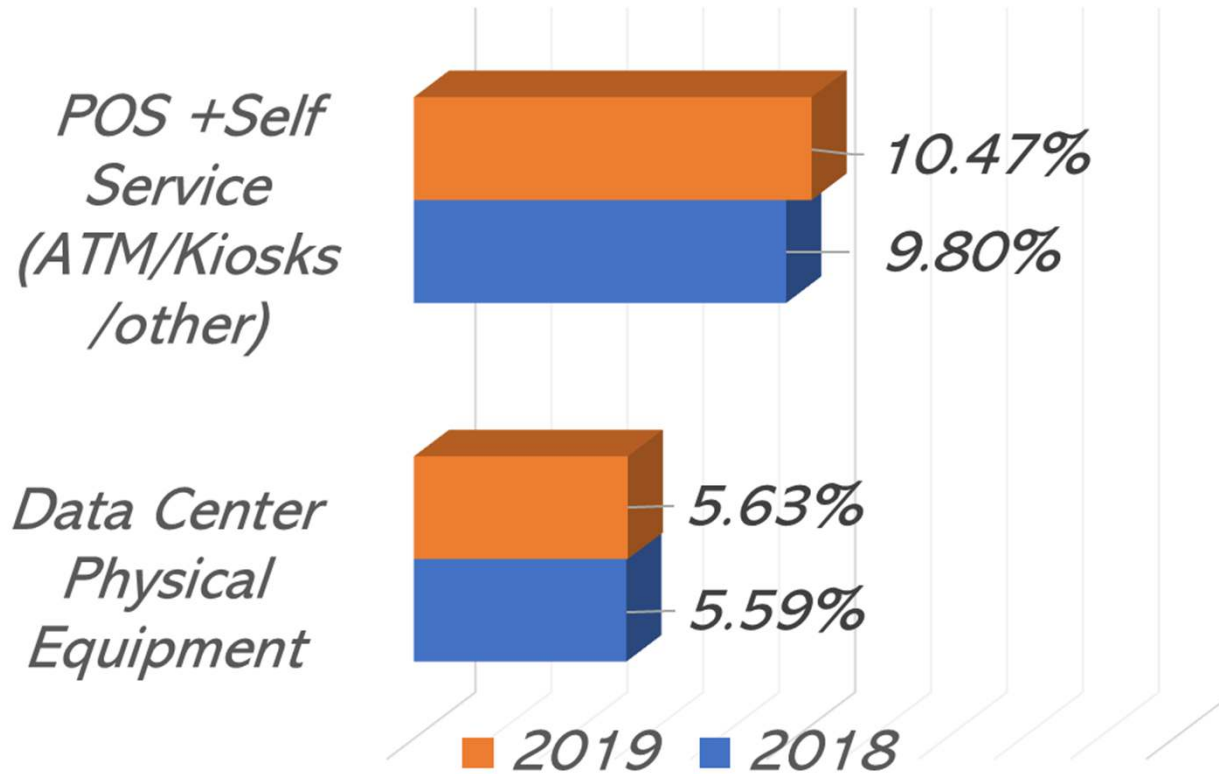


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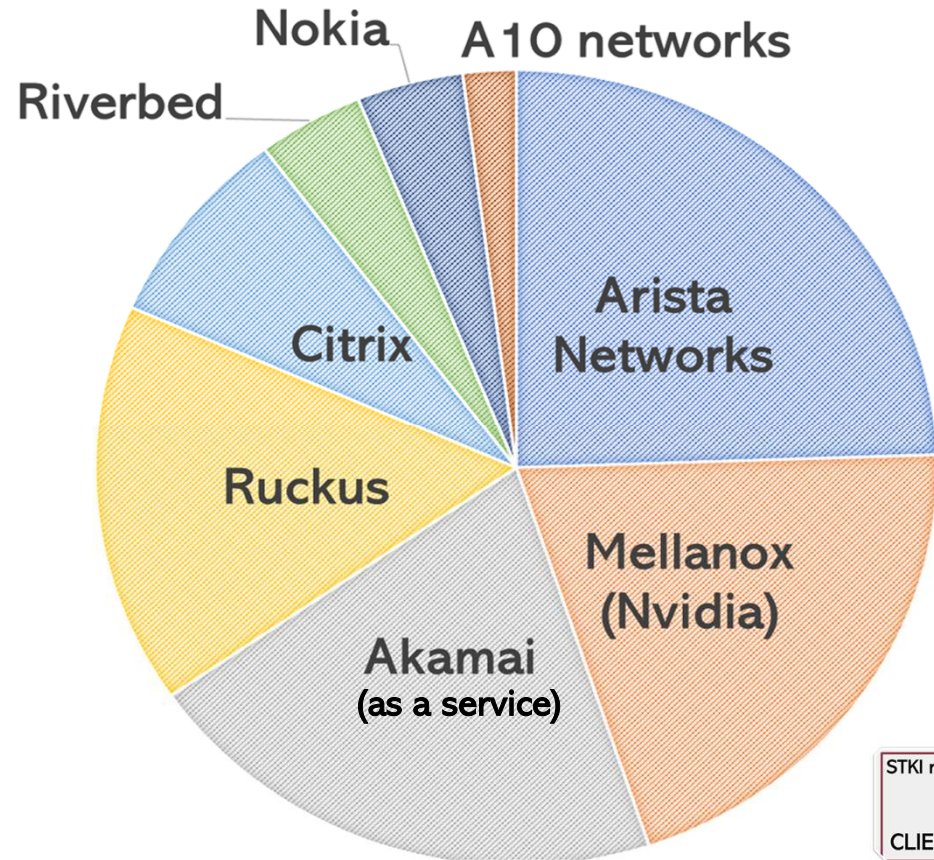
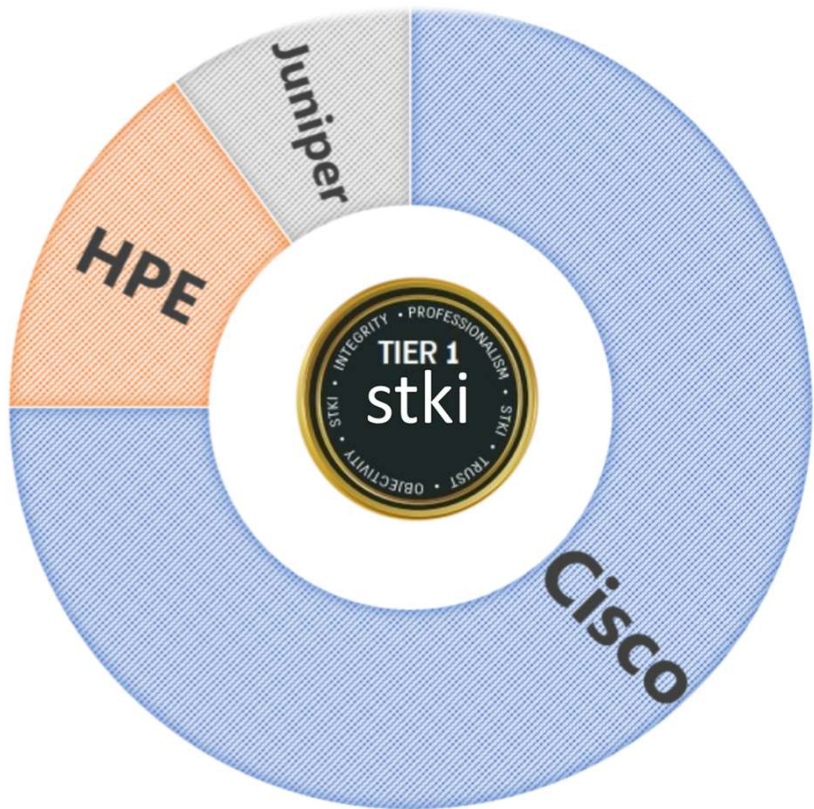


Self-service & Datacenter Equipment as a Percentage of Hardware Market



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Enterprise Networking manufacturers



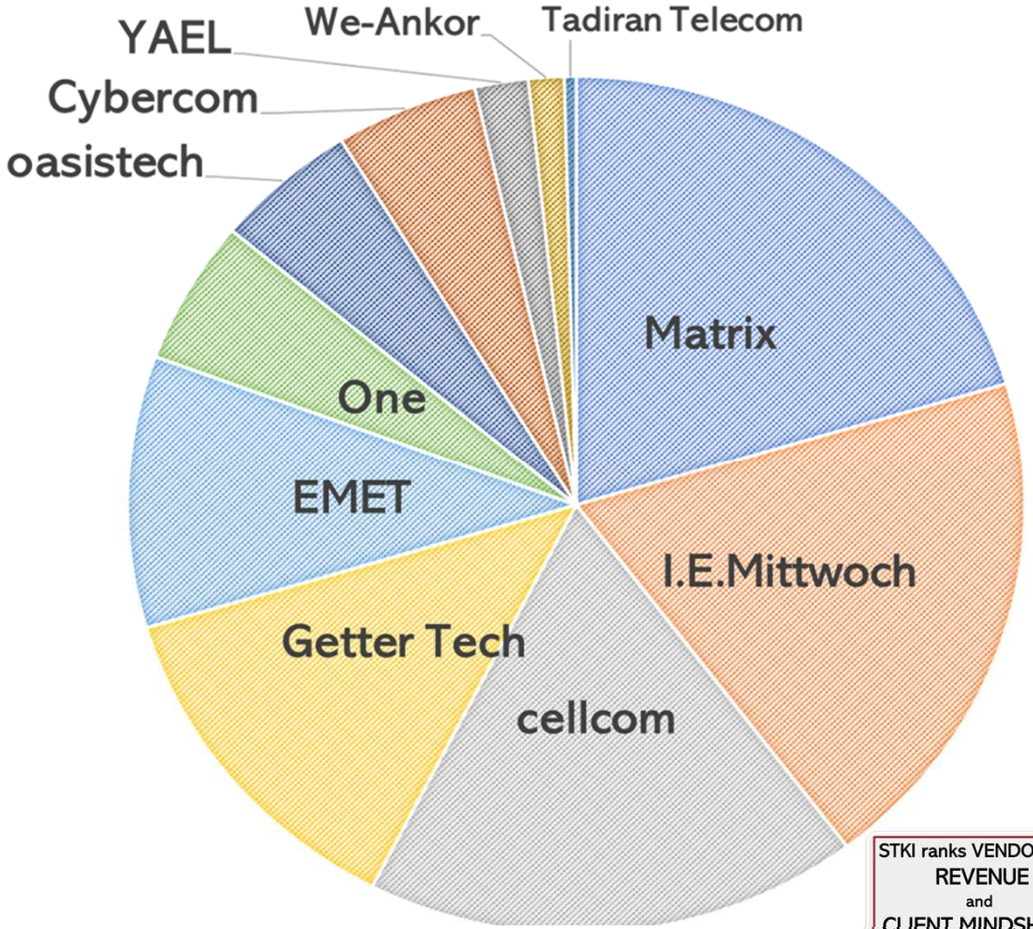
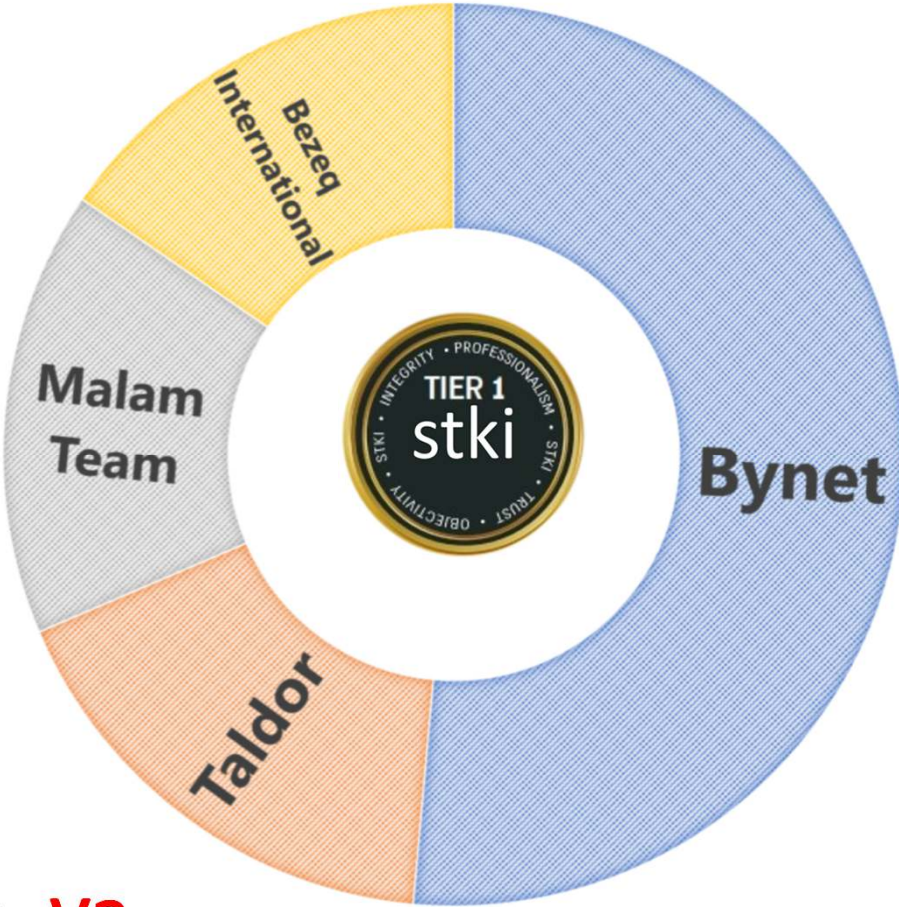
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Enterprise Networking VARs



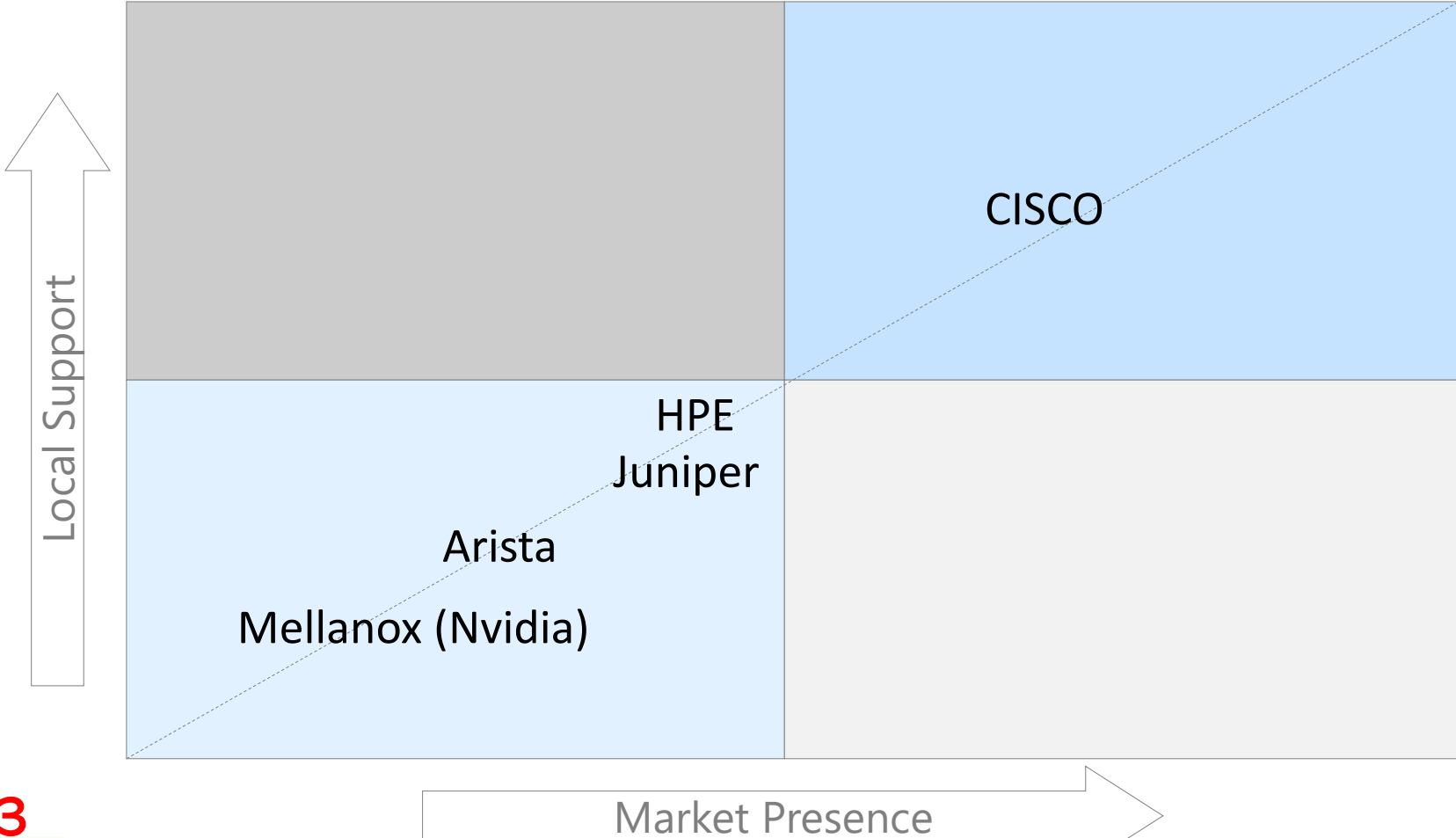
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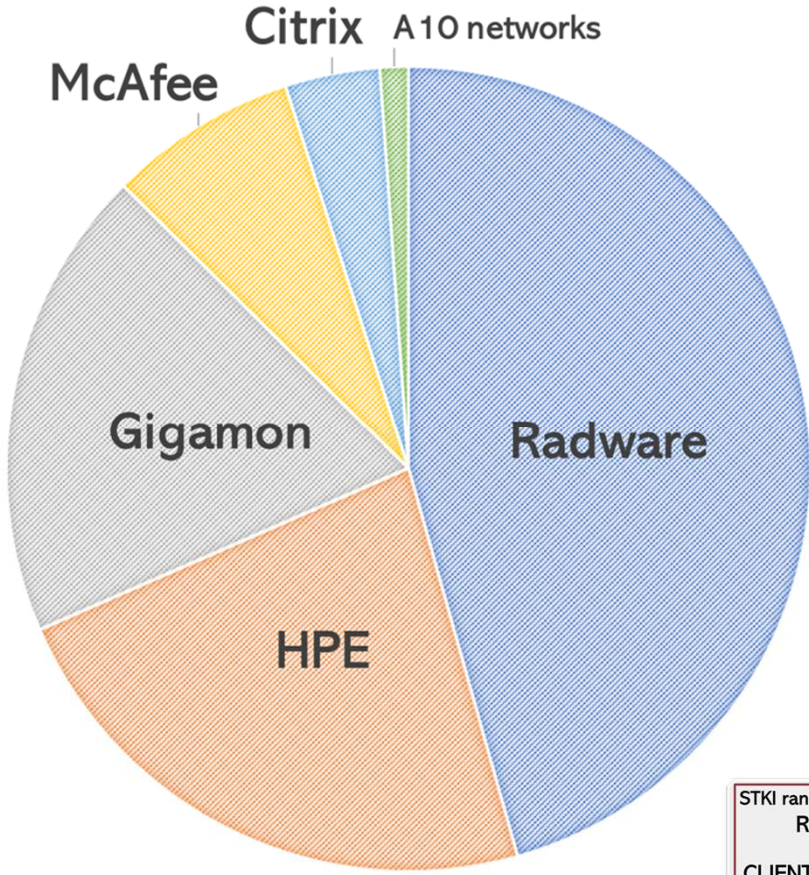
Enterprise networking- enterprise market presence 1H20



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Security / Cyber Appliances manufacturers

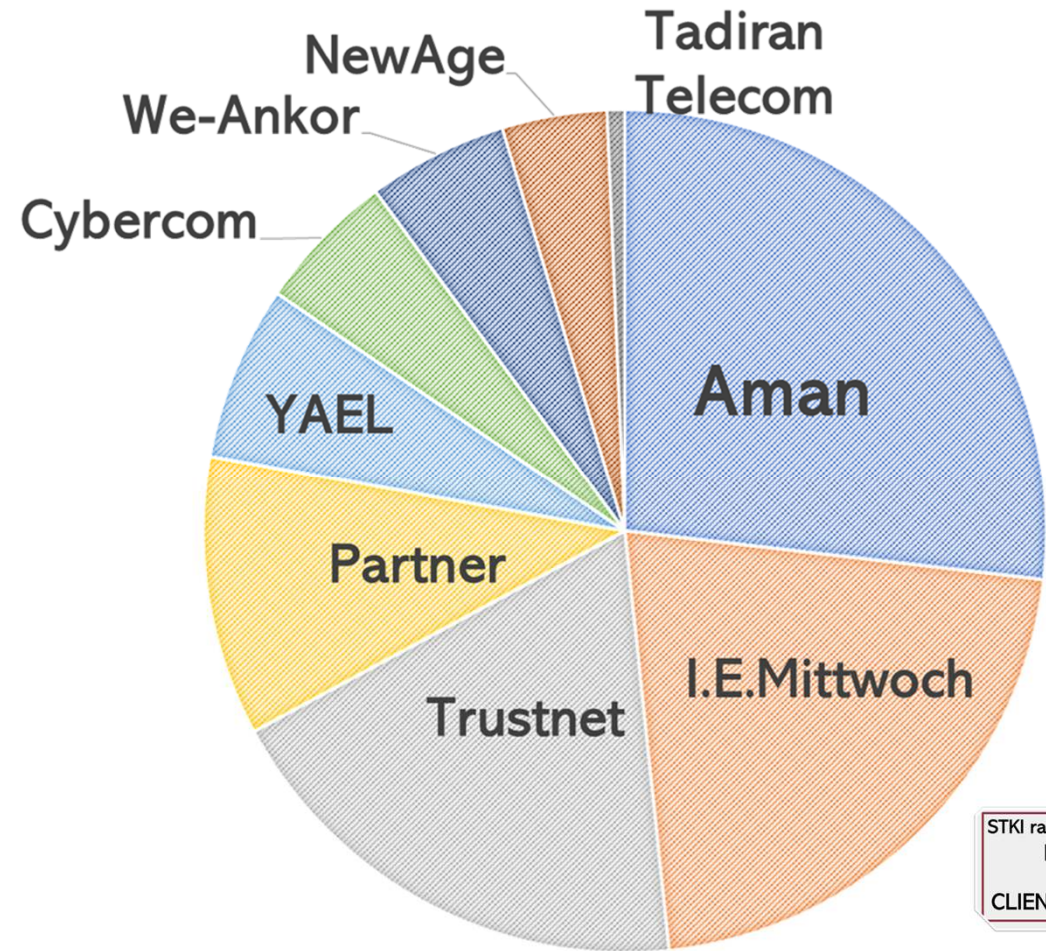
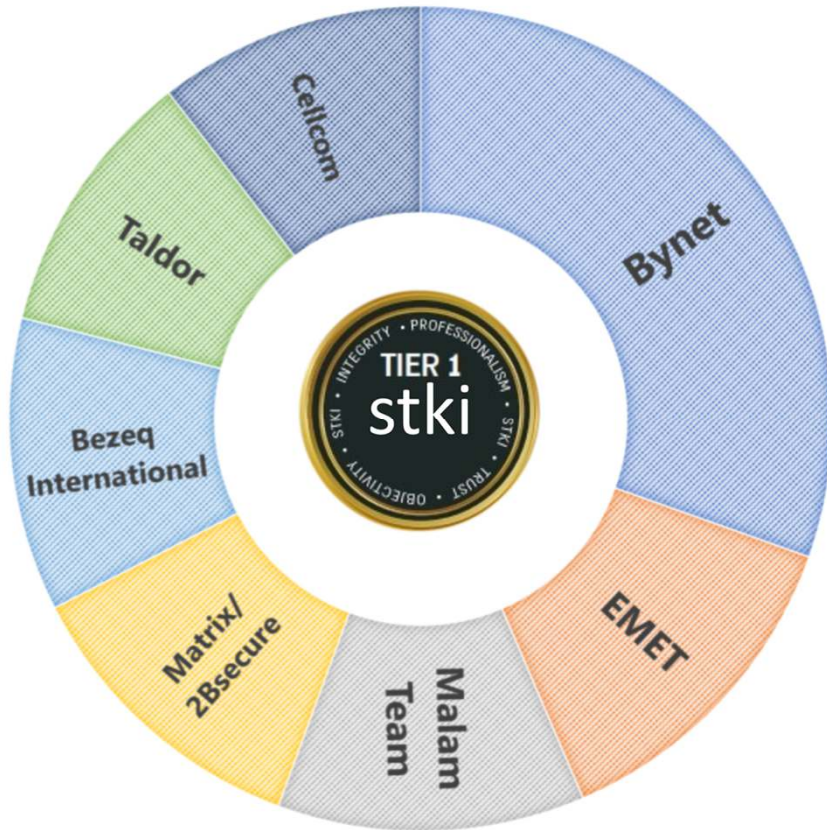


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Security / Cyber Appliances VARs



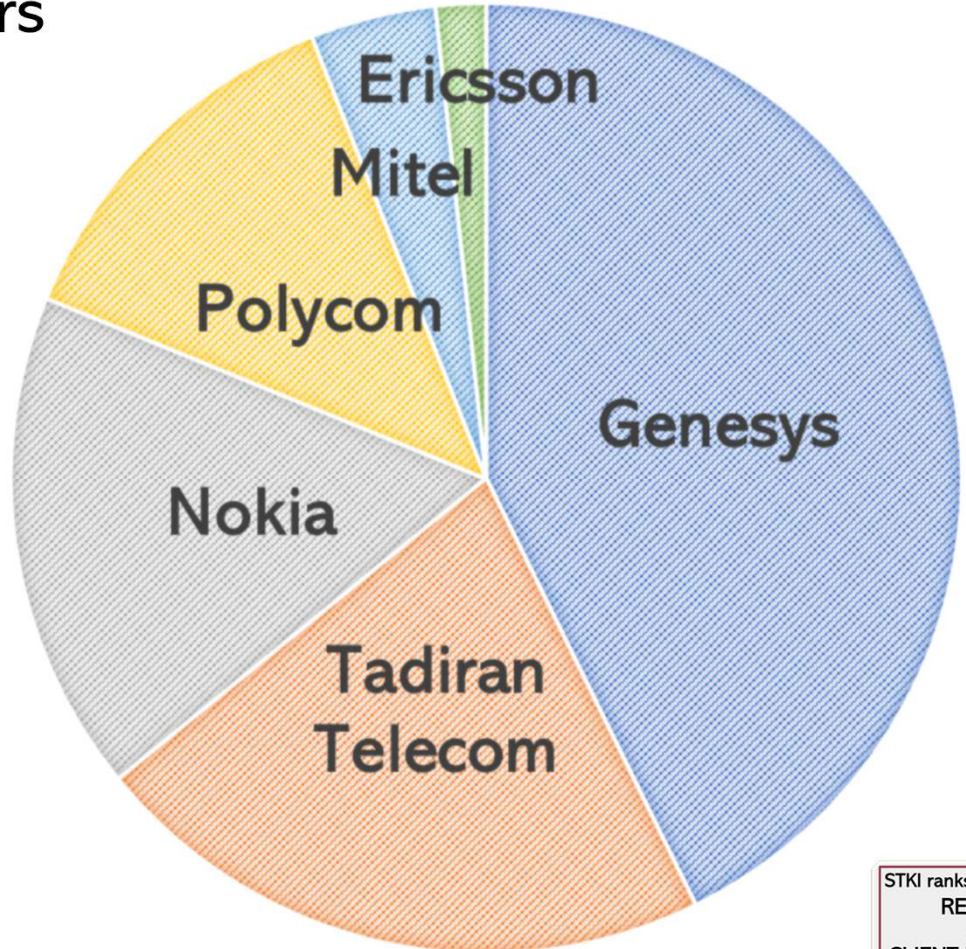
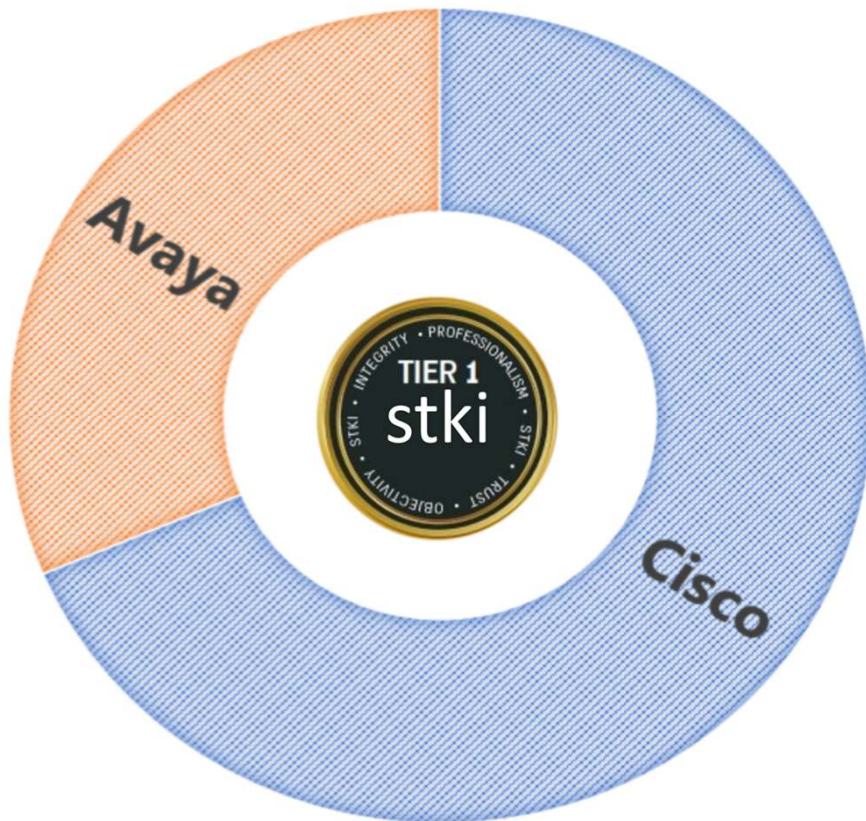
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VoIP/Call Center Equipment manufacturers



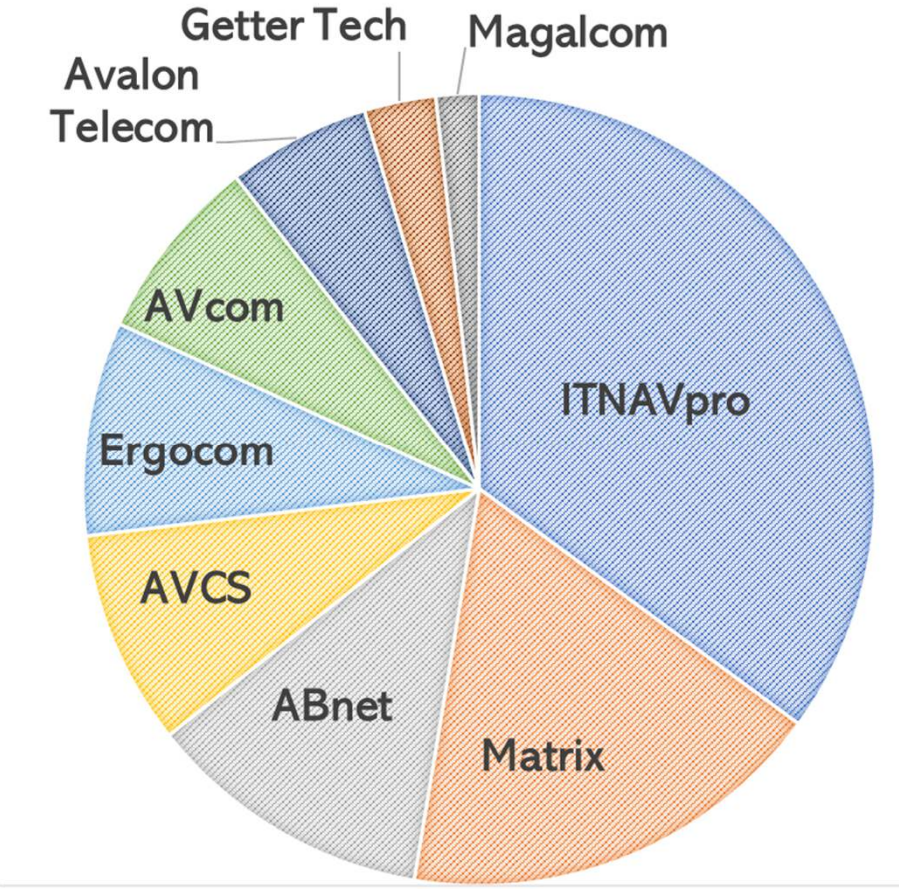
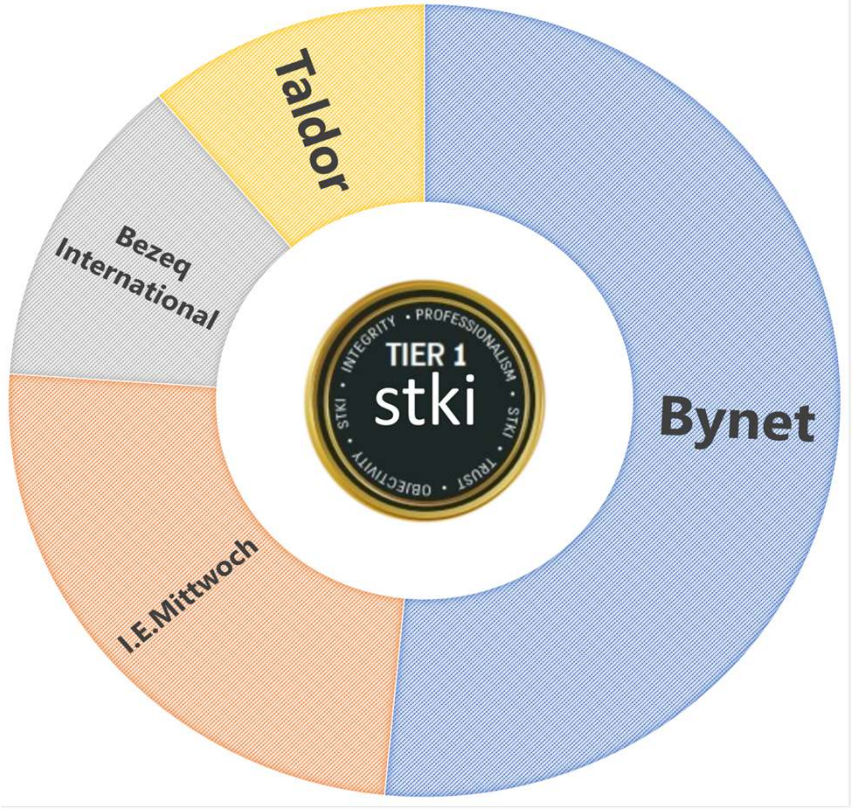
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VoIP/Call Center Equipment local VARS



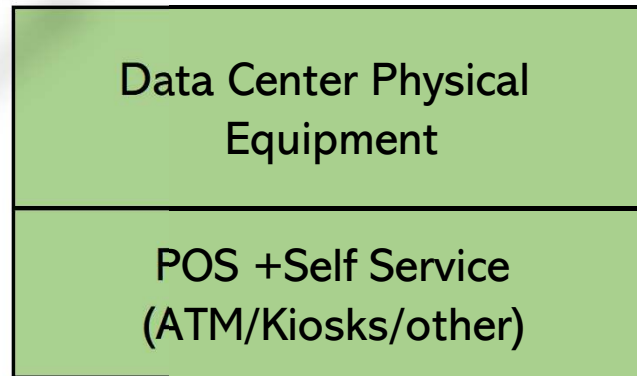
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Self-service & Datacenter Equipment



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Self-service & Datacenter Equipment

	2018		2019		2020		2021
Data Center Physical Equipment	97,000	2.58%	99,500	2.51%	102,000	42.16%	145,000
POS +Self Service (ATM/Kiosks/other)	170,000	8.82%	185,000	8.11%	200,000	7.50%	215,000
total	267,000	6.55%	284,500	6.15%	302,000	19.21%	360,000

FORECAST VERSION ONE

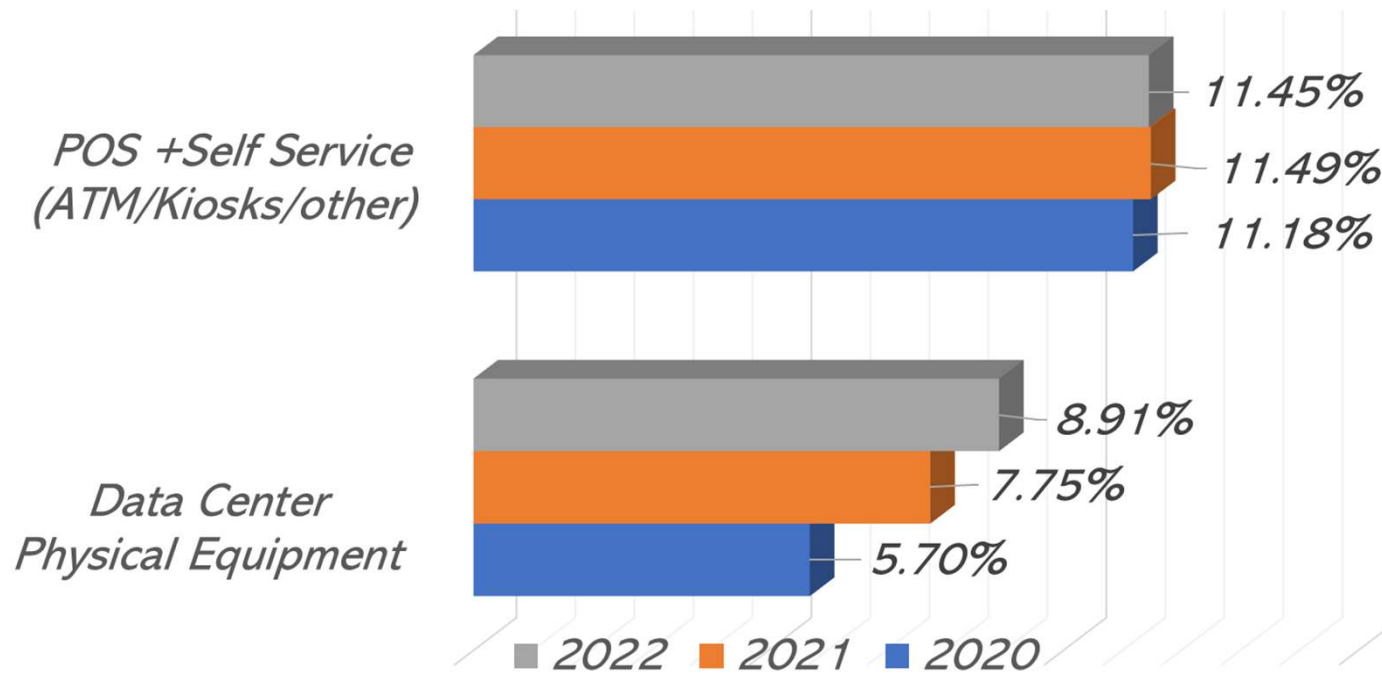
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Self-service & Datacenter Equipment as a Percentage of Hardware Market



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Self-service & Datacenter Equipment

	2019		2020		2021		2022
Data Center Physical Equipment	99,500	-14.57%	85,000	5.88%	90,000	5.56%	95,000
POS +Self Service (ATM/Kiosks/other)	185,000	18.92%	220,000	11.36%	245,000	6.12%	260,000
total	284,500	7.21%	305,000	9.84%	335,000	5.97%	355,000

FORECAST VERSION TWO

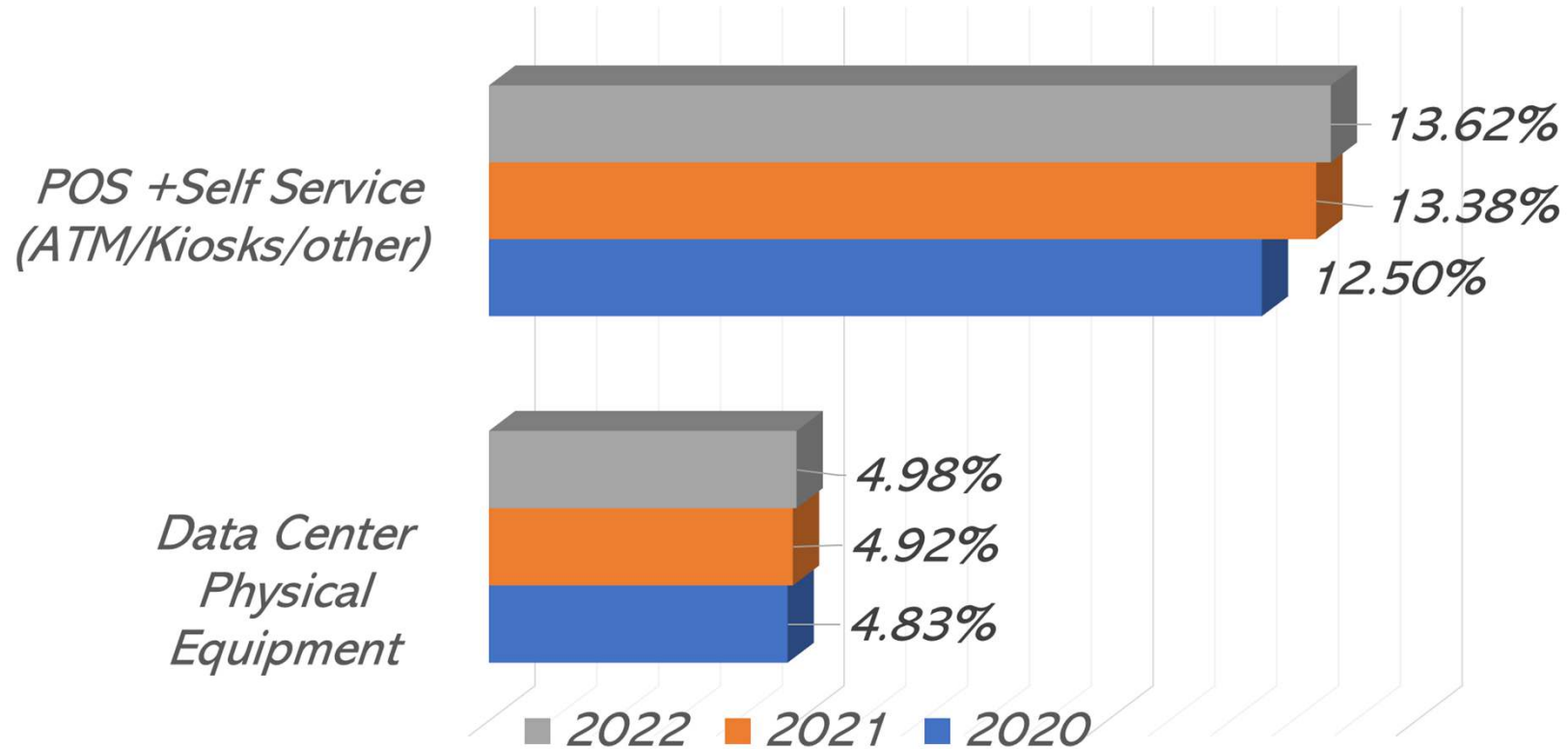
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Self-service & Datacenter Equipment as a Percentage of Hardware Market



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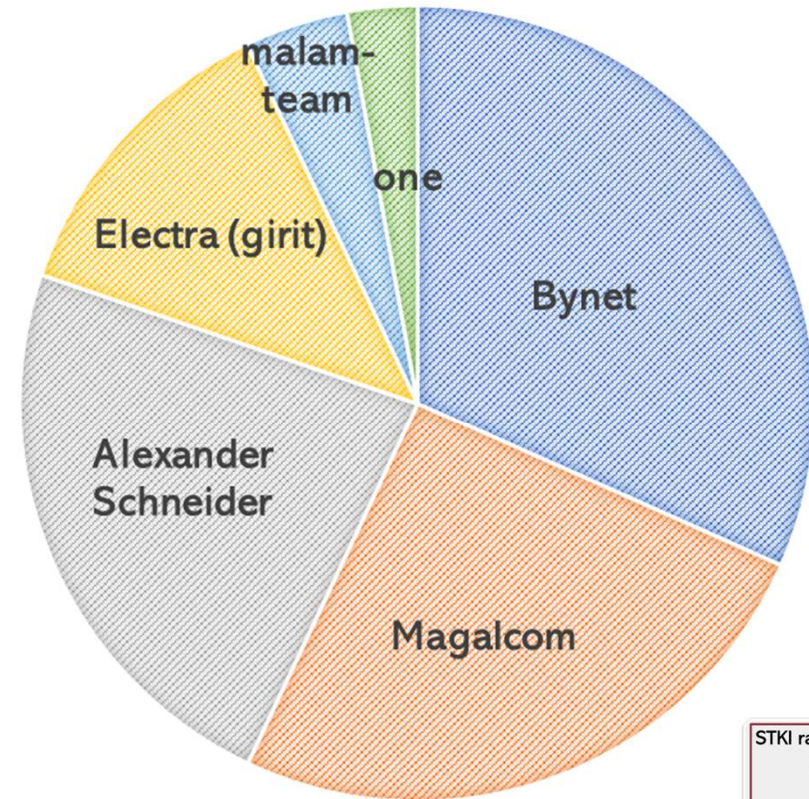
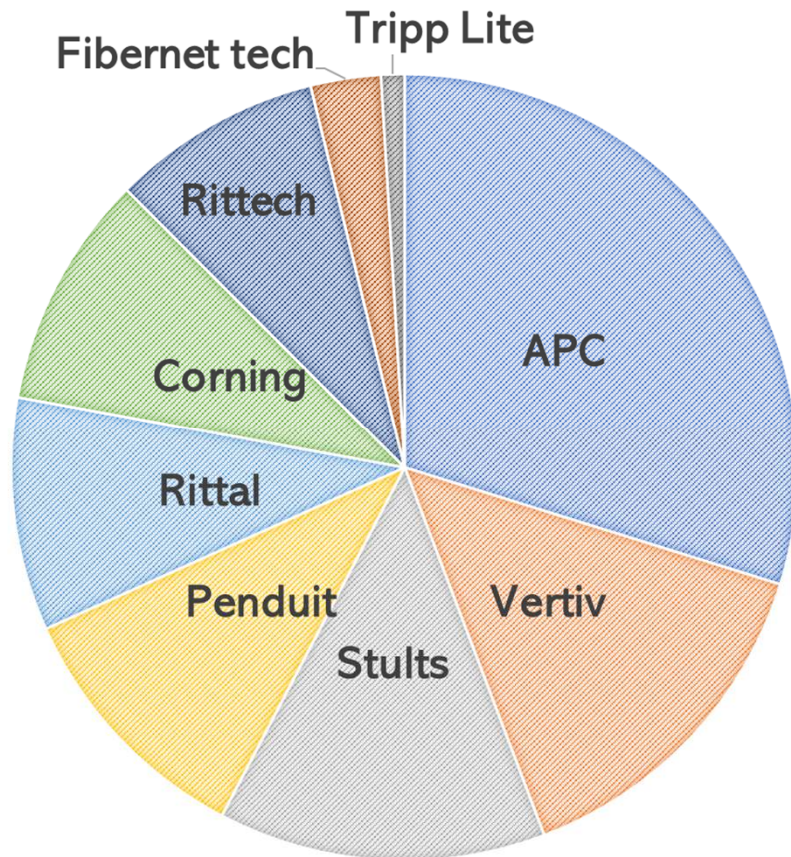


Datacenter Physical Equipment



manufacturers

local VARS



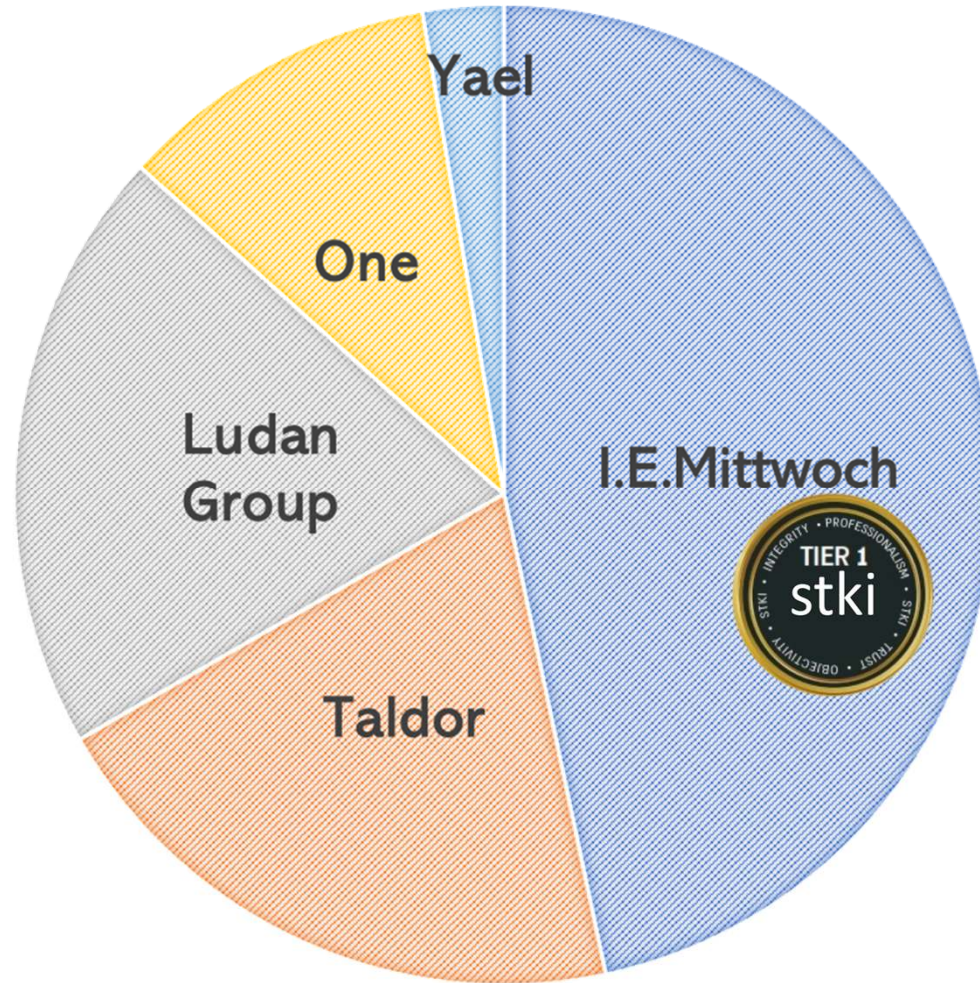
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POS +Self Service (ATM/Kiosks/other)



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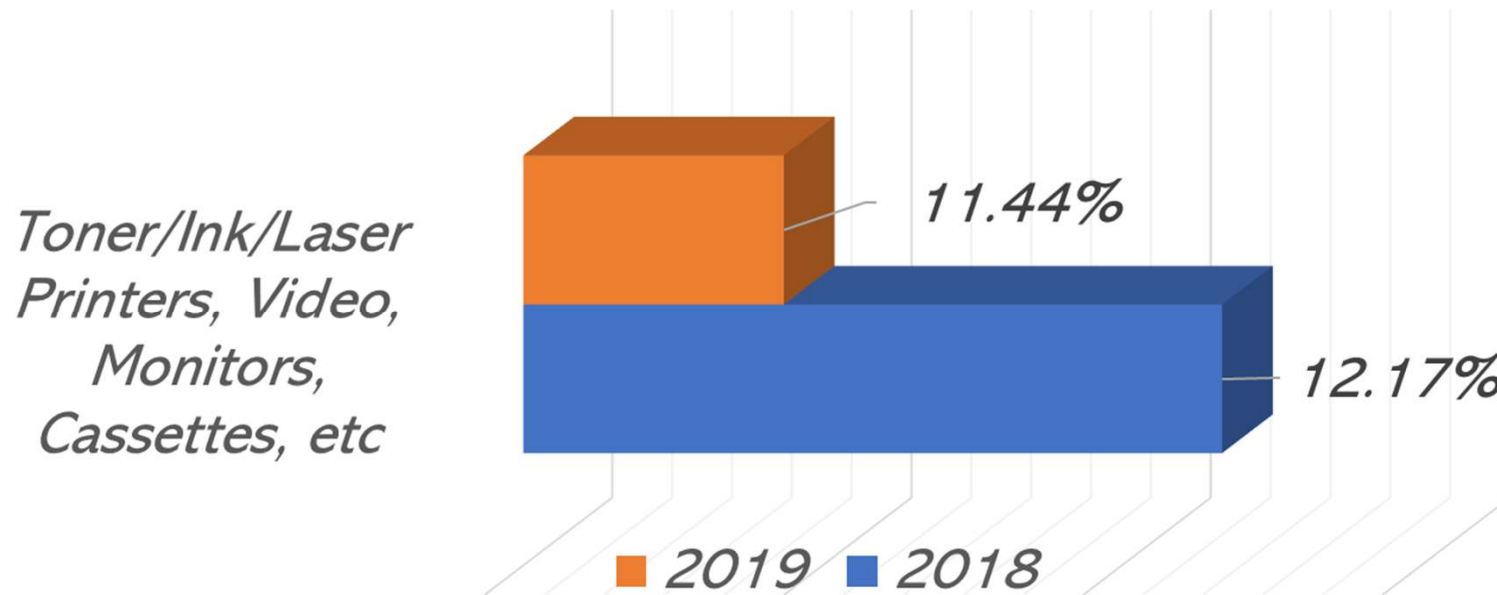
Miscellaneous Products (for enterprises only)



Toner/Ink/Laser
Printers, Video, Monitors,
Cassettes, etc



Miscellaneous Products as a Percentage of Hardware Market



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Miscellaneous Products (for enterprises only)

	2018		2019		2020		2021
Toner/Ink/Laser Printers, Video, Monitors, Cassettes, etc	211,000	-4.27%	202,000	-3.71%	194,500	-4.88%	185,000
total	211,000	-4.27%	202,000	-3.71%	194,500	-4.88%	185,000

FORECAST VERSION ONE

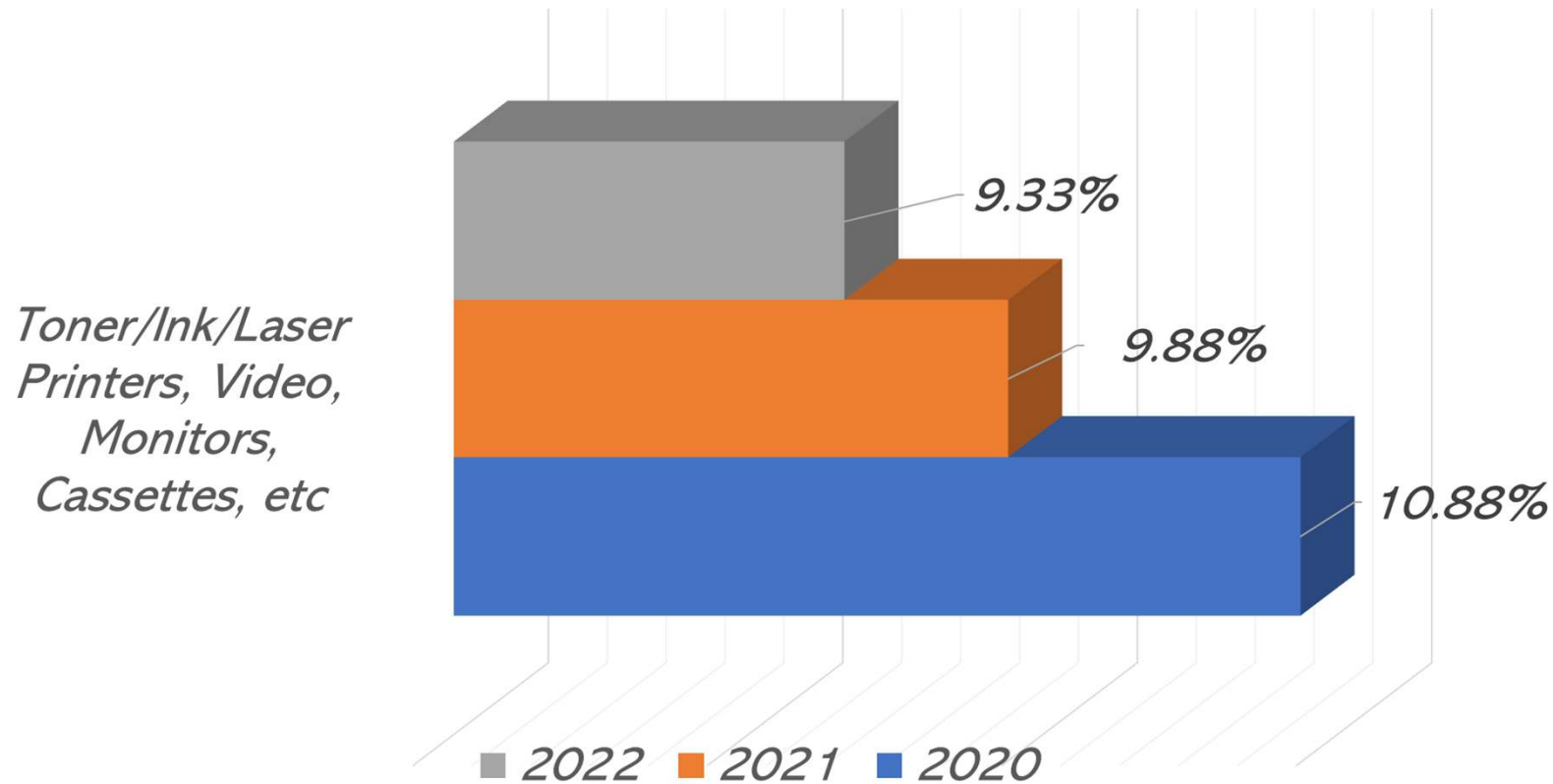
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Miscellaneous Products as a Percentage of Hardware Market



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Miscellaneous Products (for enterprises only)

	2019		2020		2021		2022
Toner/Ink/Laser Printers, Video, Monitors, Cassettes, etc	202,000	-3.71%	194,500	-4.88%	185,000	-2.70%	180,000
	202,000	-3.71%	194,500	-4.88%	185,000	-2.70%	180,000

FORECAST VERSION TWO

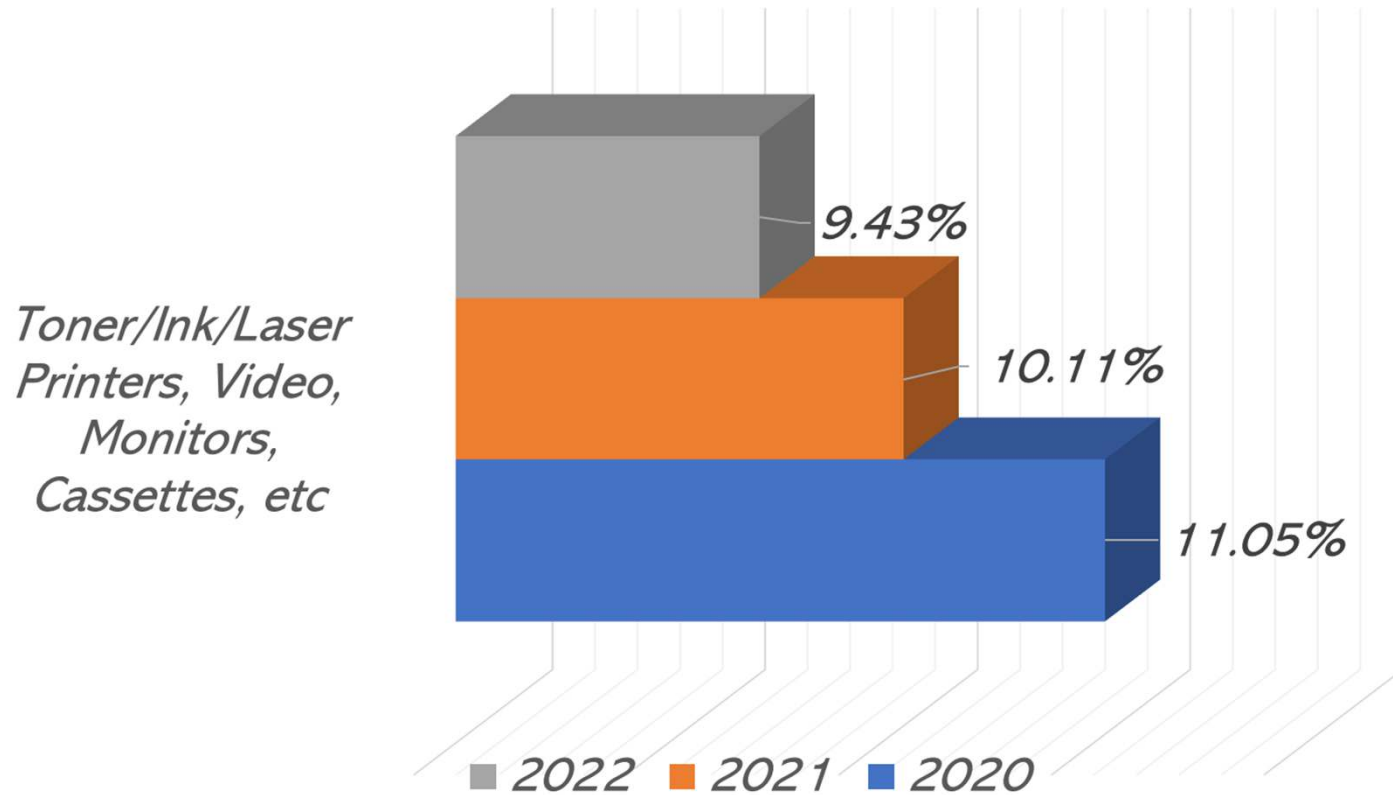
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Miscellaneous Products as a Percentage of Hardware Market



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STKI 2020 Volume 1 v3

Israeli IT Market Study

Post COVID-19 transformation, assumptions, economy, forecasts companies and industry budgets



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STKI 2020 Volume 3 v3

Israeli IT Market Study
(Software Products)



Dr Jimmy Schwarzkopf jimmy@stki.info 097907000 0547000020

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For more results of the 2020 Study and the v3 version please open the other 3 volumes.

STKI 2020 Volume 4 v3

Israeli IT Market Study
(Value Added Services)



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A circular seal with a gold border and a dark blue center. The text "TIER 1" is at the top, "stki" is in the middle, and "STKI" is on the sides. The seal is surrounded by the words "INTEGRITY", "PROFESSIONALISM", "TRUST", and "OBJECTIVITY".

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ANNUAL ISRAELI IT MARKET STUDY

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STKI 2020 Volume 2 v3

Israeli IT Market Study

(Hardware-Infrastructure)



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Any questions or comments
please contact me:

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972 9 790 7000



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