

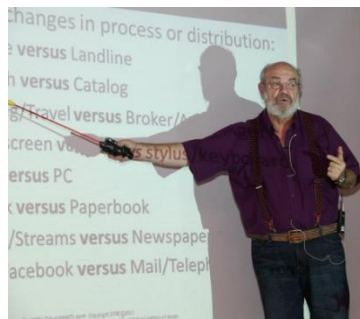


Dr. Jimmy Schwarzkopf
Managing Partner, STKI
jimmy@stki.info
Tel: +972 9 790 7000

Forecast: **2013**
IT Market in Israel



- **Dr. Schwarzkopf has worked during the last 35 years in all areas of Computer Information Services:**
 - As an Industry Analyst at 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 / 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 ABD (PhD Program) in Systems Science (received (twice) the William Larimer Mellon Scholarship/Award) from Carnegie Mellon University. His doctorate (DM-Management/ Entrepreneurship) he received from Case Western Reserve University.**



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STKI's goal is to help our clients make the right choices in the strategic and financial management of their information technology systems.

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



Unlike some research and advisory firms



does no consulting work ,
allowing our research to be
**totally unbiased, with no
hidden agendas to
promote** any particular
technology or vendor.

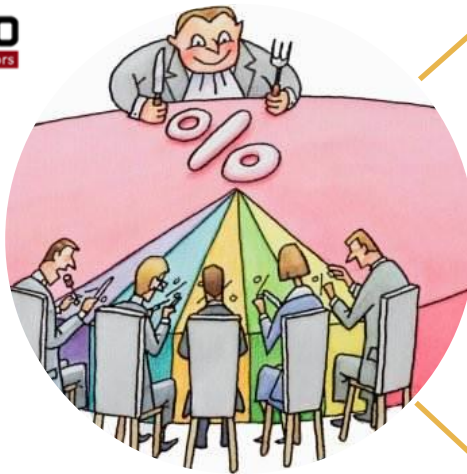


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STKI's Methodology



Budgets

- 210 CIOs
- 16 Industries

Sales

- 310 Vendors
- 106 categories
- X000s products/services

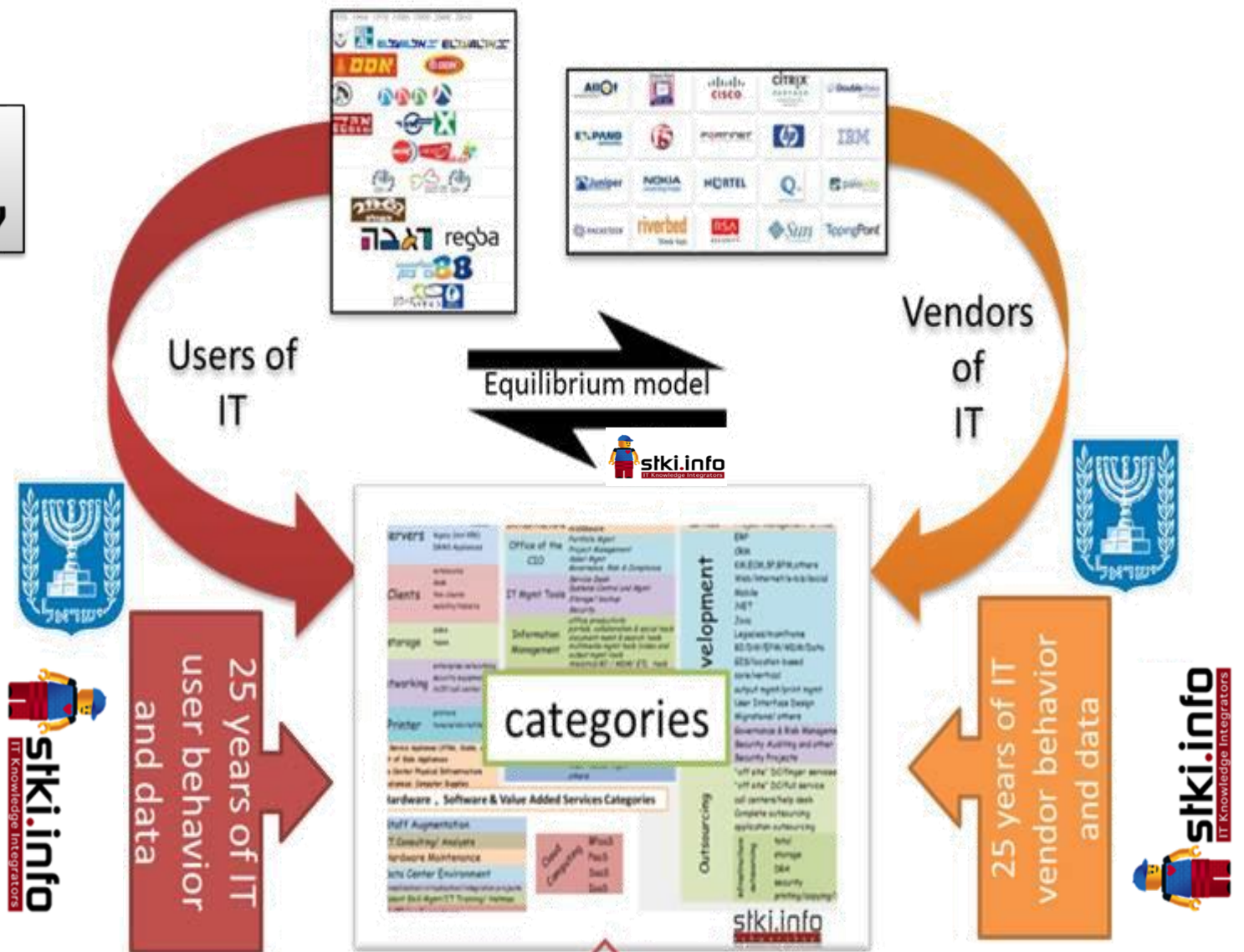
Technology

- Trends in Israel
- Trends in World



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STKI's Methodology



ISRAELI MARKET

FACTS

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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.

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

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Israel: Economic Data

2013 Israel IT Market

Israel: the economy

Subject Descriptor	Units	2010	2011	2012	2013	2014	2015
Gross domestic product, constant prices	Percent change	5.741	4.605	2.946	3.207	3.582	3.709
Inflation, average consumer prices	Percent change	2.687	3.45	1.661	2.103	2.047	2.047
Unemployment rate	Percent of total labor force	8.275	7.05	7	7	6.5	6.5

International Monetary Fund, World Economic Outlook Database, October 2012

Israel: OECD comparison data

EN | FR | RU [contact](#) [oecd.org](#)

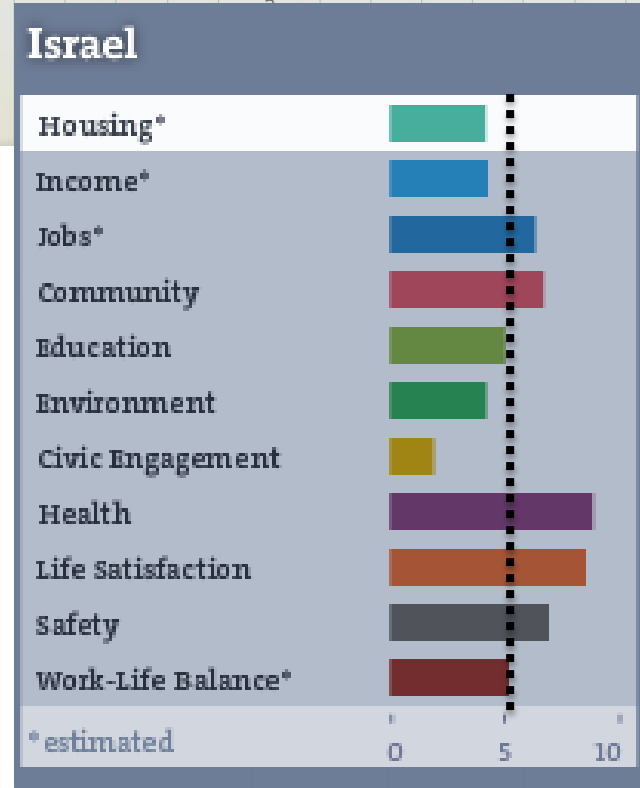
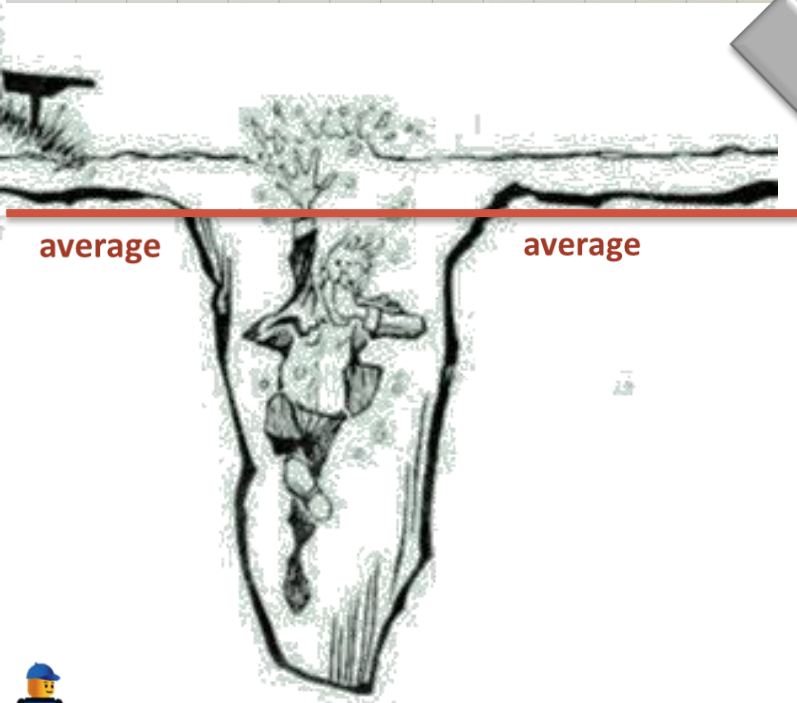


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Countries ▾

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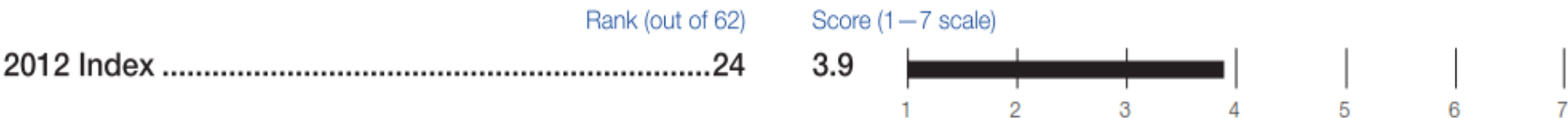
About



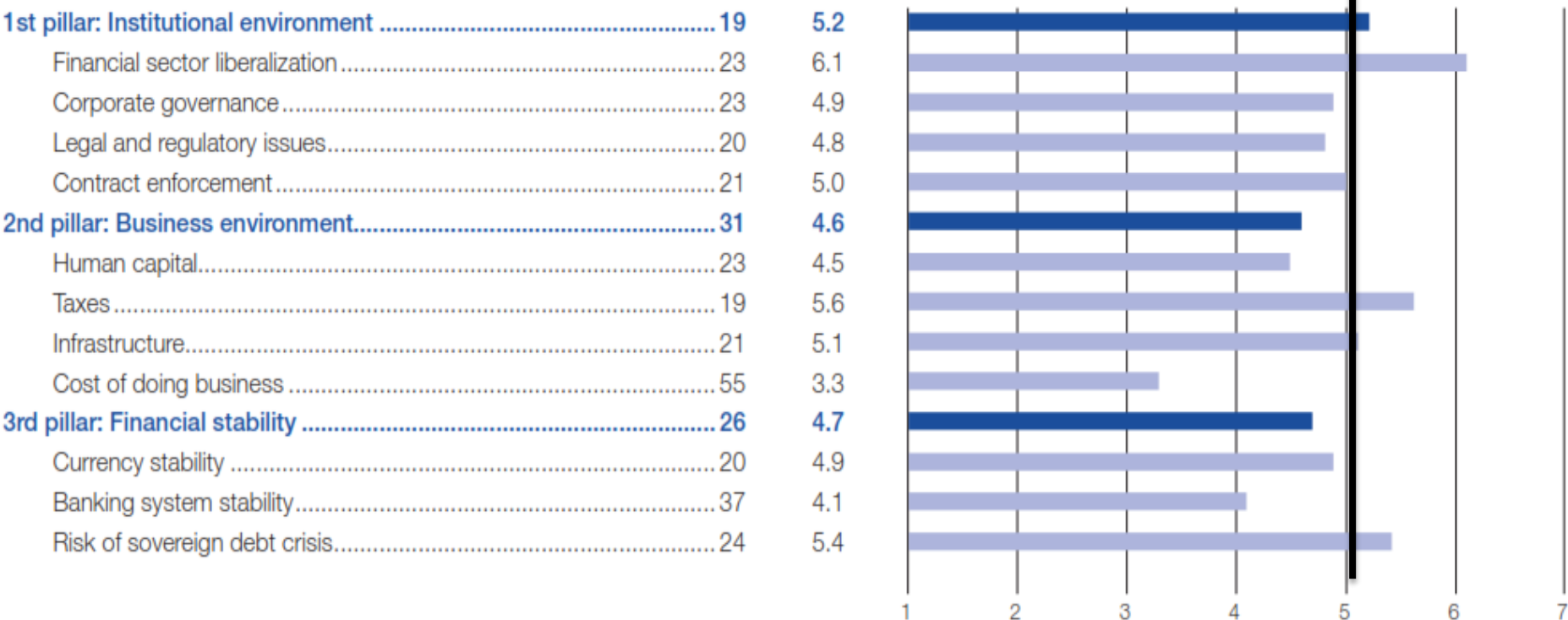
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Israel: more data

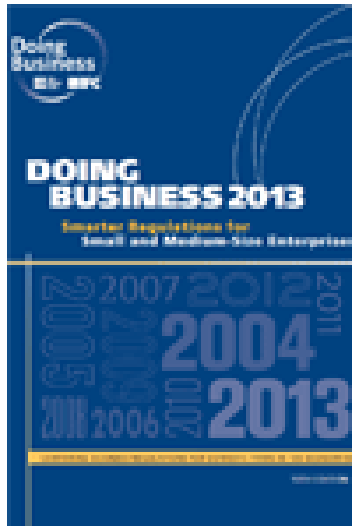
Financial Development Index 2012



Factors, policies, and institutions



ISRAEL		OECD high income	GNI per capita (US\$)	28,930	
Ease of doing business (rank)	38	High income	Population (m)	7.8	
Starting a business (rank)	41	✓ Registering property (rank)	144	Trading across borders (rank)	10
Procedures (number)	5	Procedures (number)	6	Documents to export (number)	5
Time (days)	21	Time (days)	81	Time to export (days)	10
Cost (% of income per capita)	4.0	Cost (% of property value)	7.3	Cost to export (US\$ per container)	620
Minimum capital (% of income per capita)	0.0			Documents to import (number)	4
		Getting credit (rank)	12	Time to import (days)	10
Dealing with construction permits (rank)	139	Strength of legal rights index (0-10)	9	Cost to import (US\$ per container)	565
Procedures (number)	19	Depth of credit information index (0-6)	5		
Time (days)	212	Public registry coverage (% of adults)	0.0	Enforcing contracts (rank)	94
Cost (% of income per capita)	86.4	Private bureau coverage (% of adults)	100.0	Procedures (number)	35
				Time (days)	890
Getting electricity (rank)	91	Protecting investors (rank)	6	Cost (% of claim)	25.3
Procedures (number)	6	Extent of disclosure index (0-10)	7		
Time (days)	132	Extent of director liability index (0-10)	9	Resolving insolvency (rank)	47
Cost (% of income per capita)	13.8	Ease of shareholder suits index (0-10)	9	Time (years)	4.0
		Strength of investor protection index (0-10)	8.3	Cost (% of estate)	23
				Recovery rate (cents on the dollar)	45.9
		Paying taxes (rank)	82		
		Payments (number per year)	33		
		Time (hours per year)	235		
		Total tax rate (% of profit)	30.5		



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Unemployment and Participation

As % of total labor force

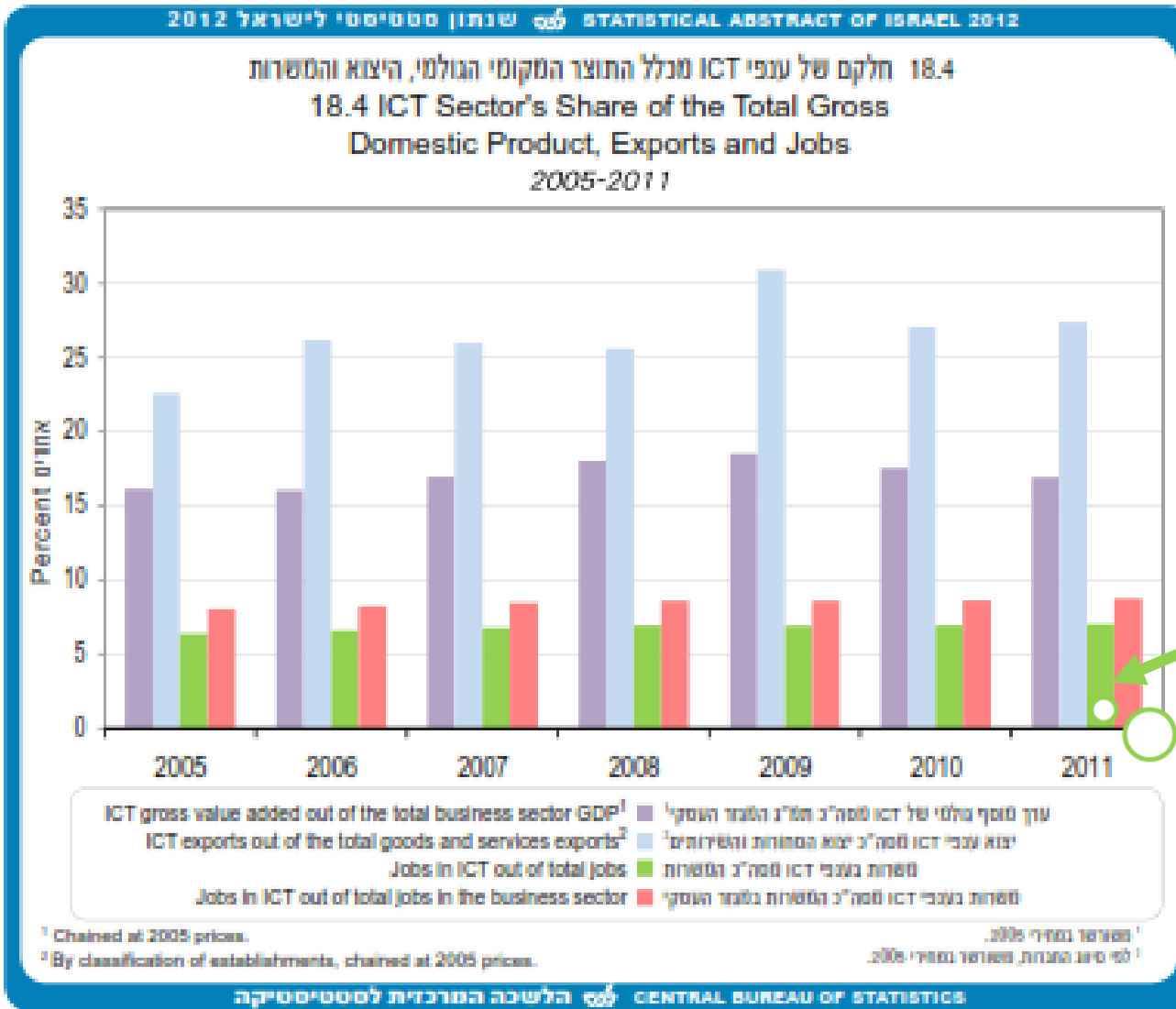
Since the 2nd quarter of 2009 unemployment is relatively decreasing, with a gradual increase in the participation rate since the beginning of 2010.




only 56.9% work ?

Source: Central Bureau of Statistics

ICT is not only IT but.....



Central Bureau of Statistics
261,000 people in ICT

Ethosia's data 
37,400 people in software

7% constant
Number of ICT workers

Vendors
plus
IT departments
25,000 workers
(need of
10%/year)



Source: Tables 18.15, 18.16 תל"מ:18.15

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Israel : IT Market Sizes

2013 Israel IT Market

State of the Economy Index

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

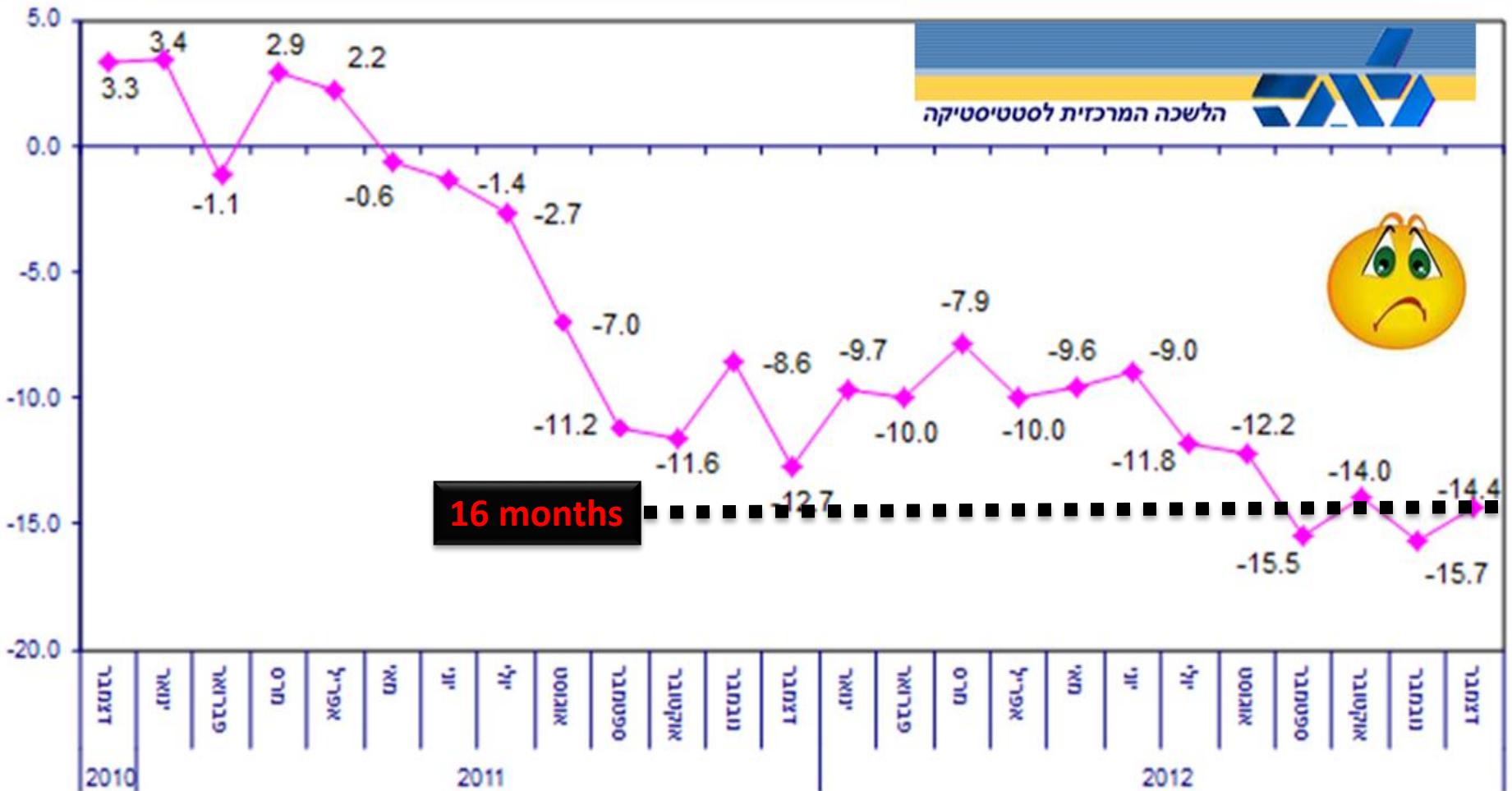


*Correlates with % change of the IT Market in Israel

סקר הערכת מגמות בעסקים: דצמבר 2012

Business Tendency Survey: December 2012

תרשים 1. מאזן כללי: דצמבר 2010 - דצמבר 2012



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Number of "legal" entities paying taxes



2012					2011					2010				
number of employees	number of companies (paying taxes)	& of TOTAL	subtotals		number of companies (paying taxes)	& of TOTAL	subtotals		subtotals	& of TOTAL	number of companies (paying taxes)	number of employees		
251+	1,476	0.63%	3,929		1,348	0.57%	3,732		3,298		0.10%	236	1001+	
101-250	2,453	1.04%			0.18%	419					401-1000			
51-100	4,088	1.73%	37,161	231,844	3,871	1.64%	35,591	232,393	225,824	56,603	6.28%	14,419	21-100	
10-50	33,073	14.01%			0.51%	1,173					101-150			
up to 9	194,683	82.45%	194,683		196,802	83.35%	196,802		169,221	73.71%	169,221	up to 5		
TOTAL	235,773				236,125				441	0.15%	335	municipalities		
										0.05%	106	government		
									225,824		TOTAL			

ACCORDING TO BITUACH LEUMI 2/2012

ACCORDING TO BITUACH LEUMI 2/2011

ACCORDING TO BITUACH LEUMI 2/2010

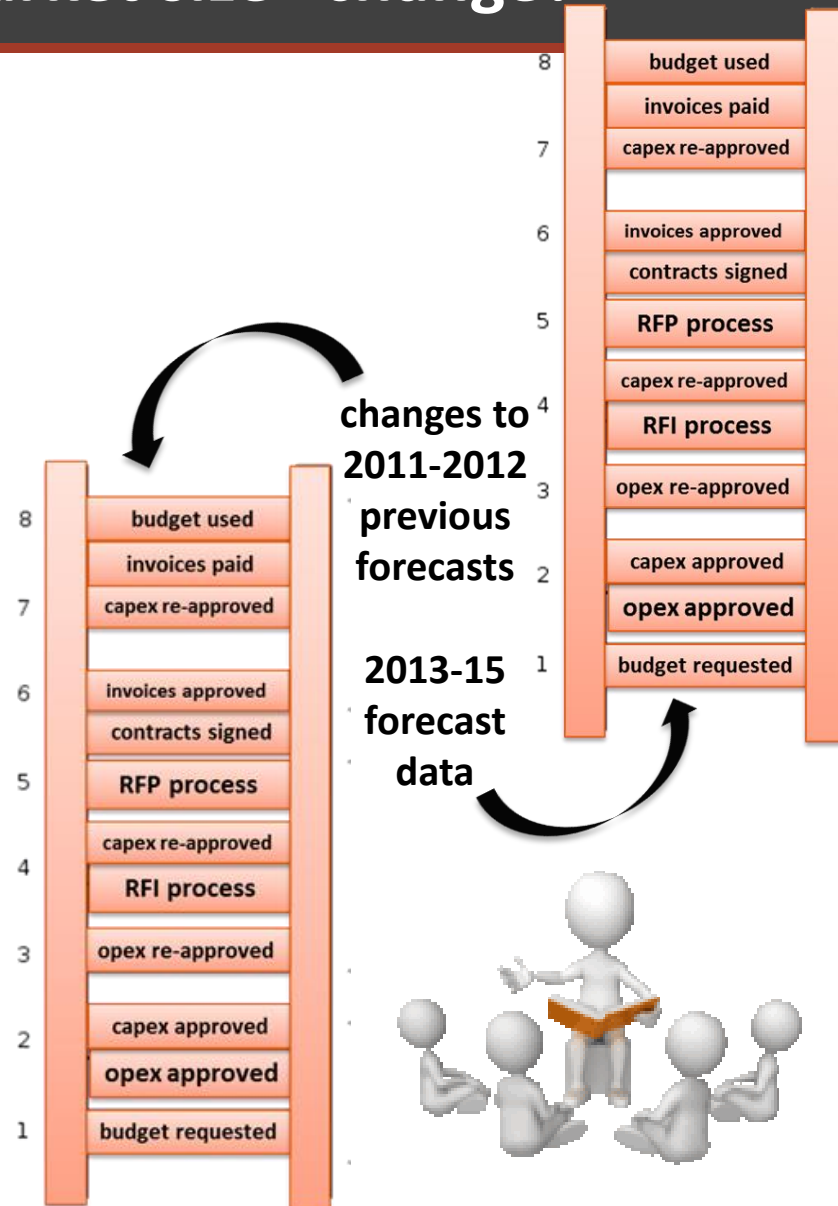
Why does the "STKI Market size" change?



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

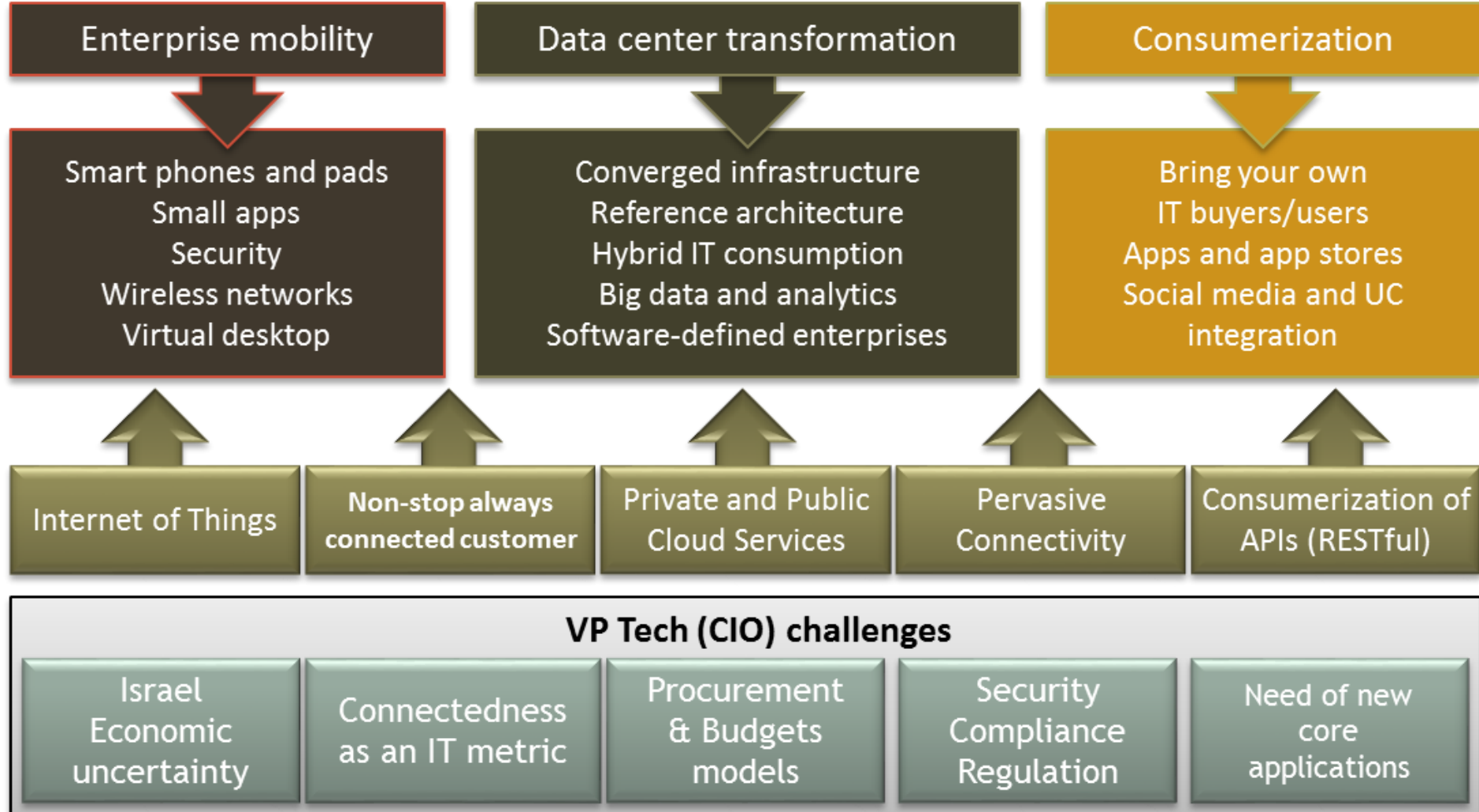


Budget Capex Spent
Budget Opex forecasted
Contracts signed
Budget Opex Spent



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Innovation based on transitions is key for 2013 IT Markets



IT BUDGETS (opex/capex): include **some** internal expenses (including some salaries*)

industry	change from 2012	Market size	% total	Market size	% total	industry
government	-8.00%	1,250	18.57%	2170	32.24%	public
security	0.00%	400	5.94%			
education	-8.70%	230	3.42%			
health	-3.45%	290	4.31%			
utilities	1.75%	285	4.23%			
transport	1.64%	305	4.53%	590	8.77%	utilities/ transport
banks	-10.43%	815	12.11%	1405	20.88%	financial
insurance	12.50%	400	5.94%			
fin other	-5.26%	190	2.82%			
manuf	-1.23%	810	12.04%	1005	14.93%	manuf/ retail
retail	-2.56%	195	2.90%			
high tech	9.72%	720	10.70%	910	13.52%	high tech/ IT
IT local vendors	0.00%	190	2.82%			
telecomm	-4.00%	250	3.71%	350	5.20%	Telecomm/ media
media	10.00%	100	1.49%			
SMB	16.67%	300	4.46%	300	4.46%	SMB
in M USD	-0.89%	6,730	100.00%	6,730	100.00%	in M USD

IT Market in Israel (million USD)



1 Rationalize & Optimize

2 Innovate & Grow

While delivering mainstream IT

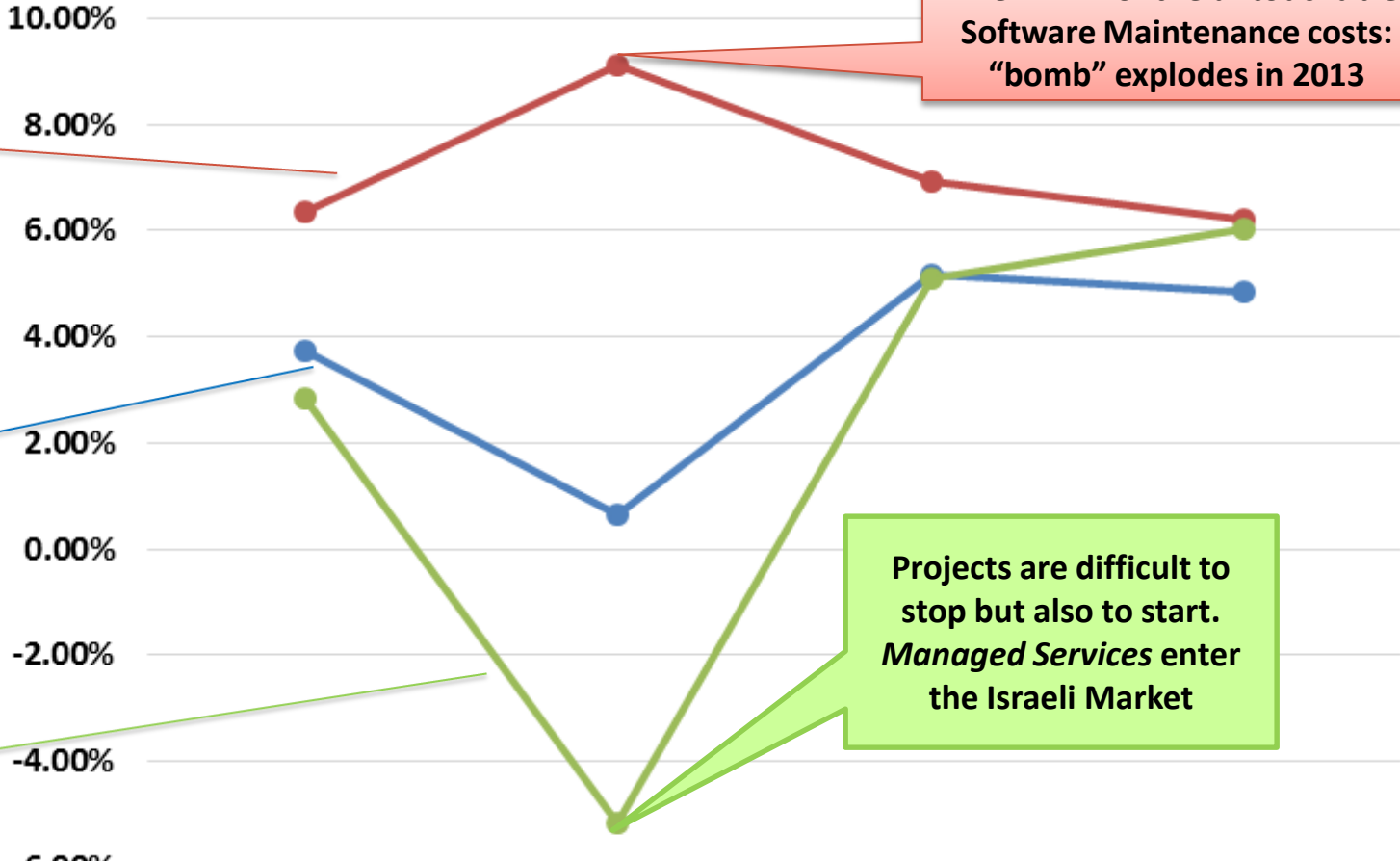
IT must deliver innovation



	2011		2012		2013		2014		2015
HARDWARE	1,714.00	3.73%	1,778.00	0.65%	1,789.50	5.17%	1,882.00	4.84%	1,973.00
SOFTWARE	1,193.20	6.37%	1,269.20	9.12%	1,385.00	6.93%	1,481.00	6.21%	1,573.00
VALUE ADDED SERVICES	3,488.00	2.84%	3,587.00	-5.16%	3,402.00	5.09%	3,575.00	6.04%	3,791.00
TOTAL	6,395.20	3.74%	6,634.20	-0.87%	6,576.50	5.50%	6,938.00	5.75%	7,337.00

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IT Market: percent change



The MYTH of the untouchable Software Maintenance costs: "bomb" explodes in 2013

Software Contracts are difficult to change

Hardware products are the easiest to cut

Second year of better negotiations & cuts in projects

Projects are difficult to stop but also to start. Managed Services enter the Israeli Market

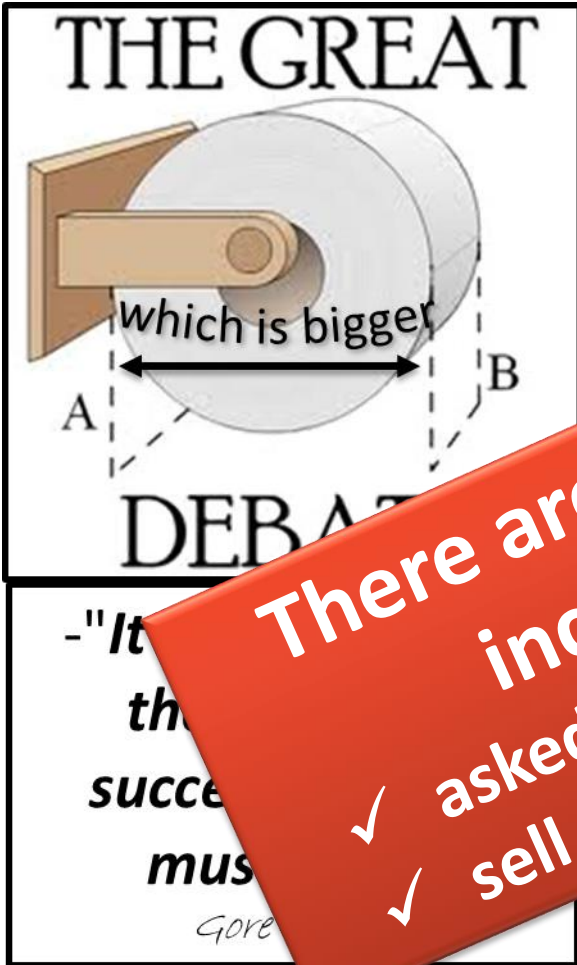
	2011-12	2012-13	2013-14	2014-15
HARDWARE	3.73%	0.65%	5.17%	4.84%
SOFTWARE	6.37%	9.12%	6.93%	6.21%
VALUE ADDED SERVICES	2.84%	-5.16%	5.09%	6.04%



Total IT Market : TIERS

2013-5 Israel IT Market

The Great Debate: explanations



Even if the graphs "look" differently

SECOND TIER	
1	
2	



There are vendors that are not included in the study
✓ asked not to be included
✓ sell only to SMBS

"not worse" just smaller "boutique"

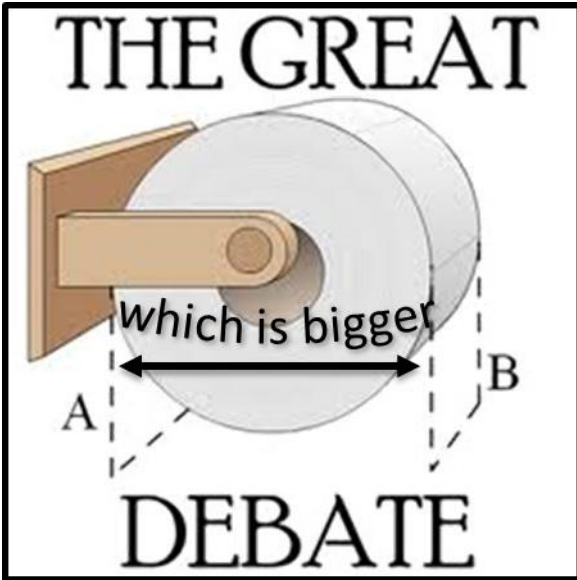
WORKS by
REVENUE
and
CLIENT MINDSHARE
All amounts in M \$ USD

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The Great Debate: explanations

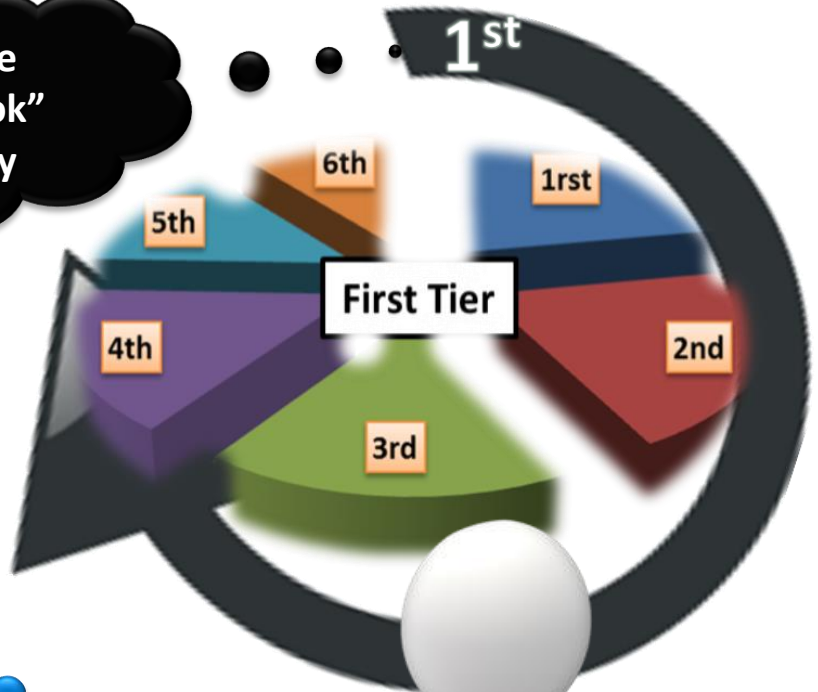


"It is not enough that I should succeed, others must fail" - Gore Vidal

Even if the graphs "look" differently

SECOND TIER
1
2
3
4
4
6
:
N

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



"not worse" just smaller "boutique"

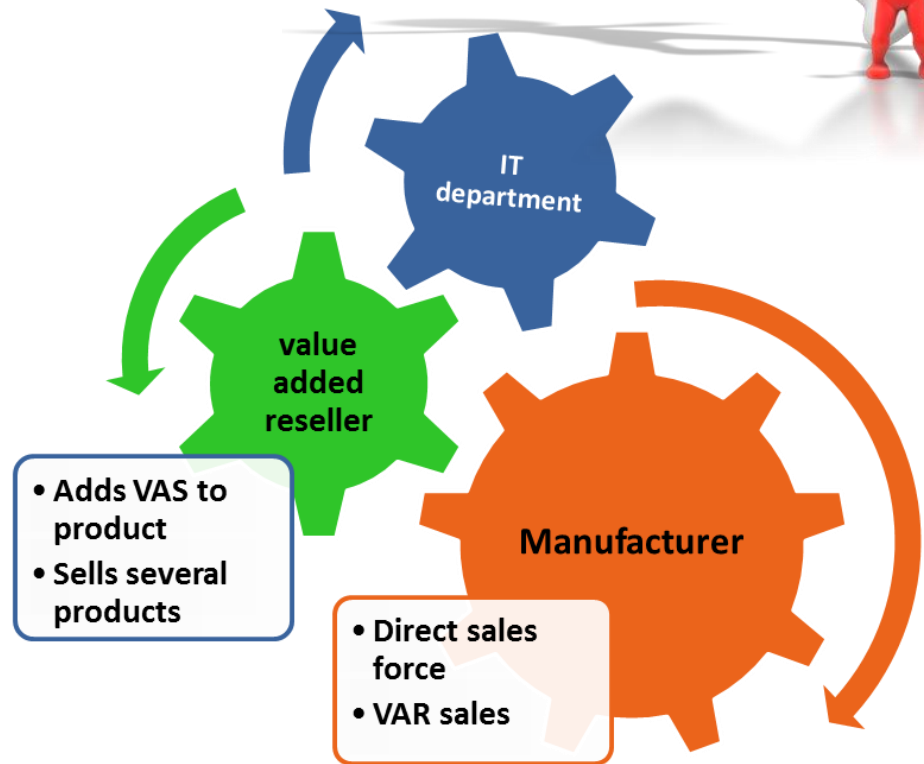


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VARs or Partners: but NO double bookings

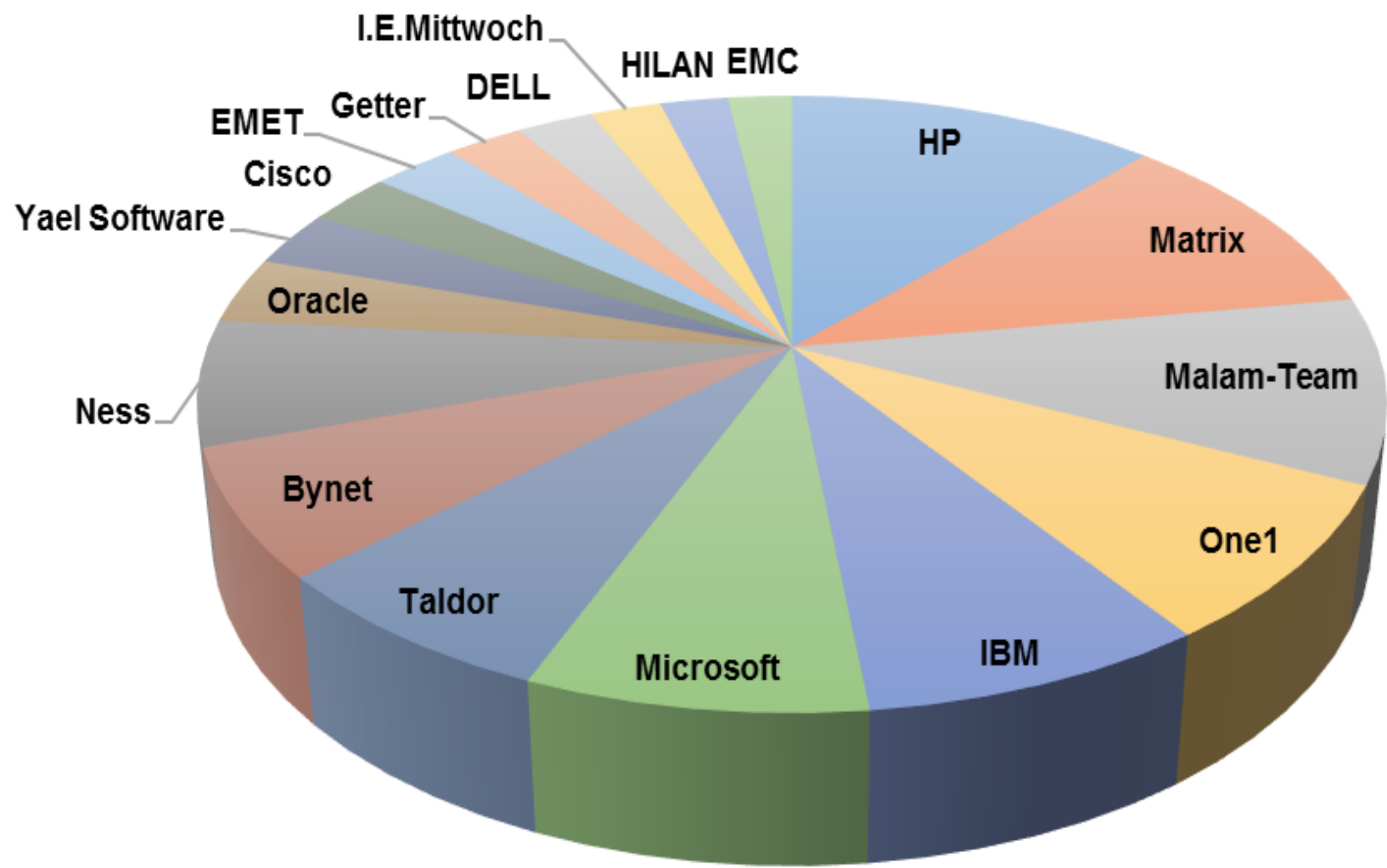


Value Added Resellers
“VAR or Partners”
are incorporated into
STKI’s “TIERS”.
Both sell into the Israeli
Market.



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Biggest Vendors in Israel 2012-13



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Hardware Market : Tiers

2012 Israel Hardware Market

Hardware Categories

servers X86	blades	בליידים	שרתי X86 (אינטל)
	servers	TOWER\פיצות	
other server architectures	legacy (non-x86)	Legacy	שרתים אחרים
	DW Appliances	DW מכונות	
clients	notebooks	ניידים	תחנות קצה
	desk	שולחני	
	thin clients	thin clients	
	<i>mobility /tablets</i>	טבלטים	
storage	disks	דיסקים	איחסון
	VTL backup appliances	מכונות VTL/גיבוי	
	tape libraries	ספריות קלטות	
networking	enterprise networking	תקשורת ארגונית	תקשורת
	security	אבטחת מידע	
	VoIP/call center equipment	CALL CENTER\ VOIP	
Printer	Printers	מדפסות	הדפסות
	toners/ ink/ reillers	דיו/טונר/מנועי לייזר	
Special Purpose	<i>Point of Sale Appliances</i>	מחשוב נקודת מכירה	ציודים יעודיים
	<i>Data Center Physical Equipment</i>	ציוד חדר מחשב (ארונות וכד')	
	<i>Self Service (ATM/Kiosks/other)</i>	שירות עצמי(כספומטים/קיוסקים וכד')	

Israel: IT Hardware Total Market 2011-2015



HARDWARE



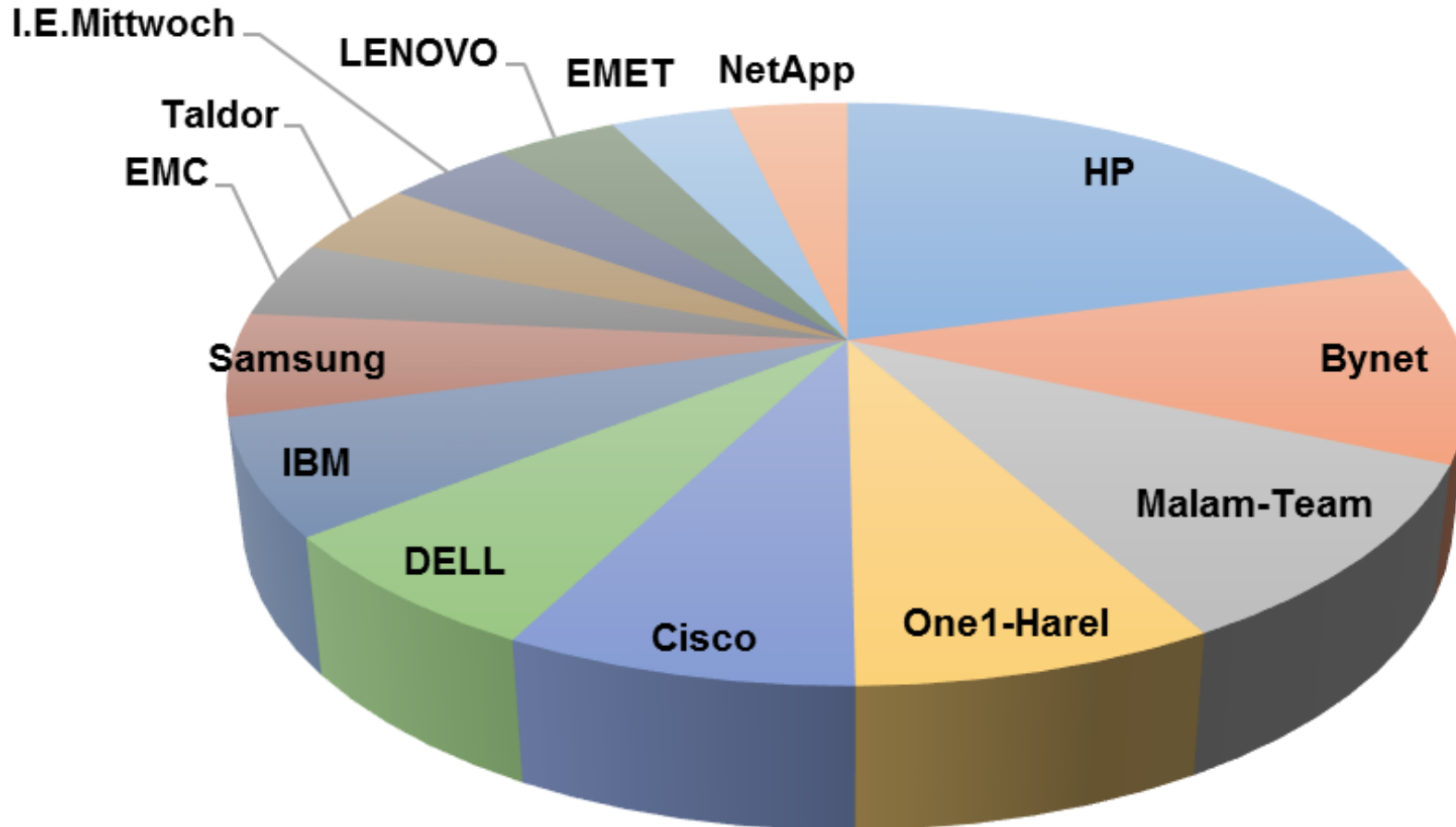
2011		2012		2013		2014		2015	
\$3,725	1.74%	\$3,790	0.33%	\$3,803	2.46%	\$3,896	2.36%	\$3,988	

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M \$ USD

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Top Hardware Vendors in Israel 2012-13



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

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Israel 2011-15 Market : Server market

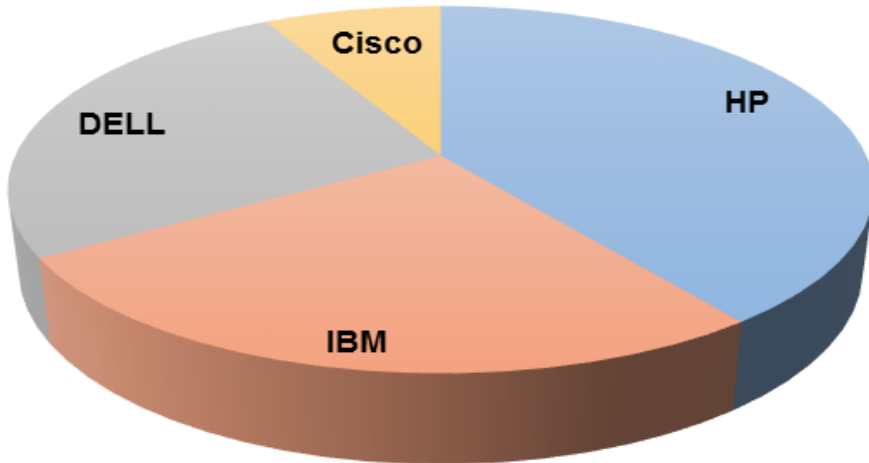


		2011		2012		2013		2014		2015
x386	servers	158.0	4.43%	165.0	3.03%	170.0	-4.71%	162.0	11.11%	180.0
	blades	145.0	6.90%	155.0	3.23%	160.0	15.63%	185.0	6.49%	197.0
legacy (non X86)		60.0	-8.33%	55.0	-9.09%	50.0	-16.00%	42.0	-28.57%	30.0
DBMS Appliances		12.0	108.33%	25.0	20.00%	30.0	33.33%	40.0	25.00%	50.0
totals		375.0	6.67%	400.0	2.50%	410.0	4.63%	429.0	6.53%	457.0

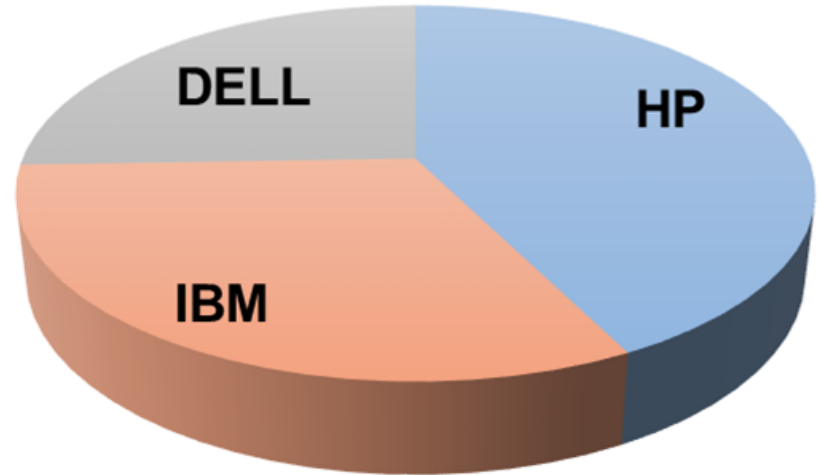


Market Players: Servers 2012

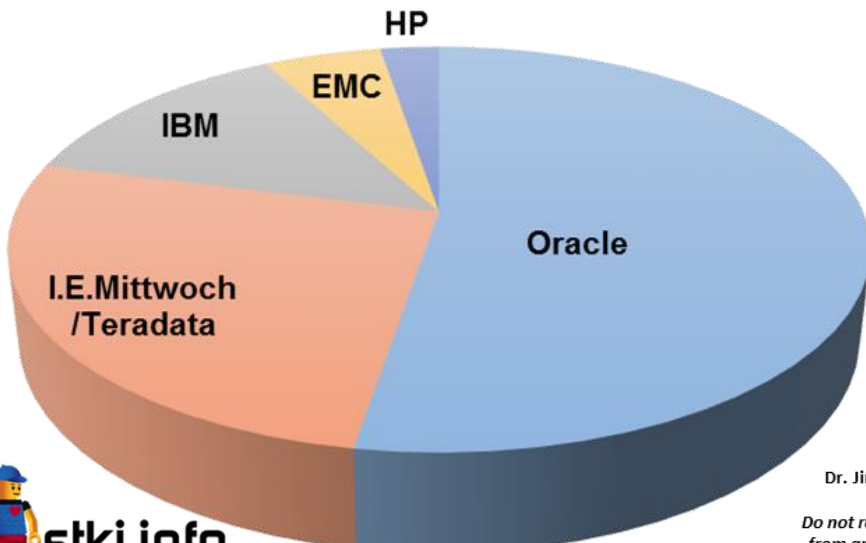
Blades (manufacturers)



Servers (X86-pizza)



DW Appliance

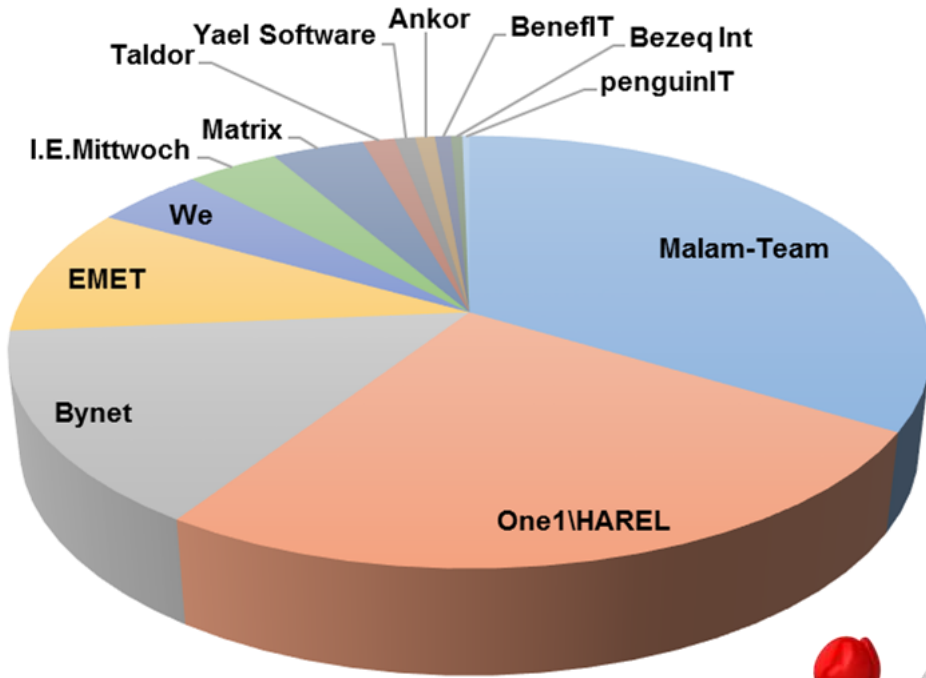


We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

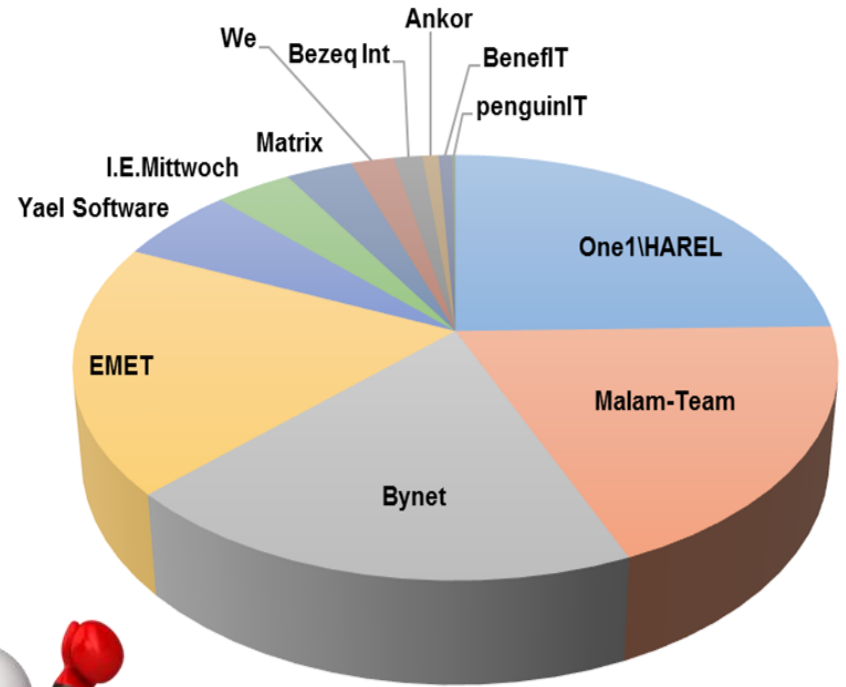


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Market Players: Servers 2012



Blades (local VARs)



Servers (X86-pizza) Local VARs

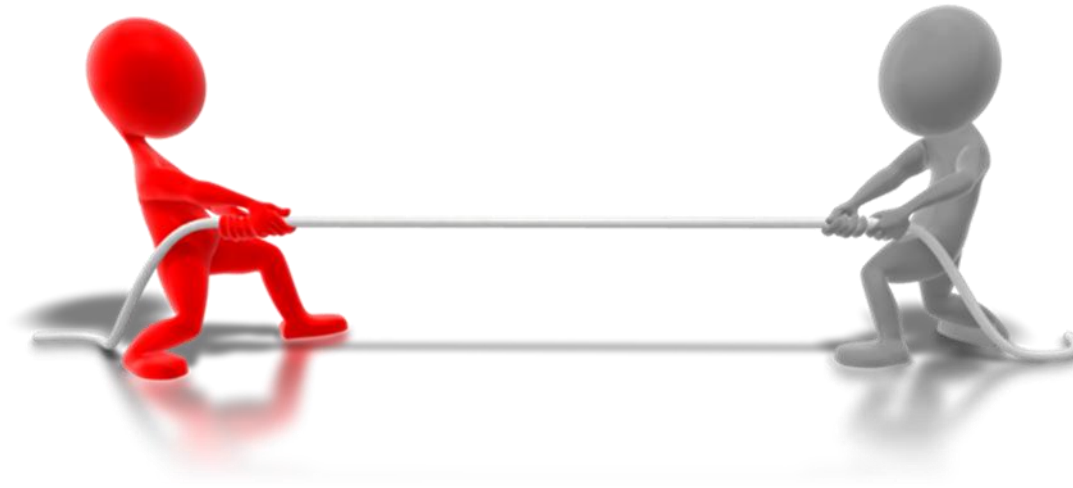


We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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Israel 2011-15 Market : “personal computing” market



	2011		2012		2013		2014		2015
notebooks	130.0	-3.85%	125.0	-28.00%	90.0	-5.56%	85.0	-5.88%	80.0
desk	152.0	-13.16%	132.0	-16.67%	110.0	-4.55%	105.0	-4.76%	100.0
thin clients	7.0	-14.29%	6.0	8.33%	6.5	7.69%	7.0	28.57%	9.0
mobility/tablets	100.0	20.00%	120.0	25.00%	150.0	23.33%	185.0	13.51%	210.0
totals	389.0	-1.54%	383.0	-6.92%	356.5	7.15%	382.0	4.45%	399.0



Market Players: mobility appliances 2013



iPhones: 1,600,000
iPads: 600,000
iPad mini: strong entry

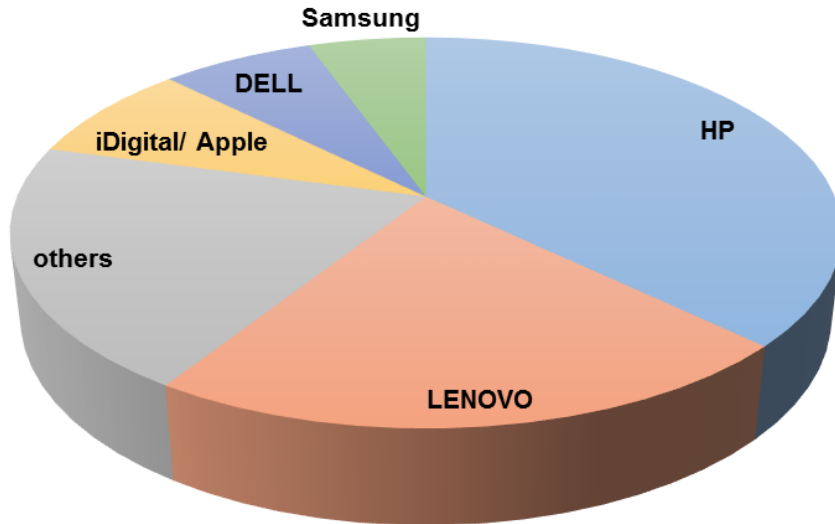
Phones: 1,800,000
Tablets: 200,000
Galaxy note 2: positive responses

Real competitor, last to enter, a lot will depend on a successful ecosystem

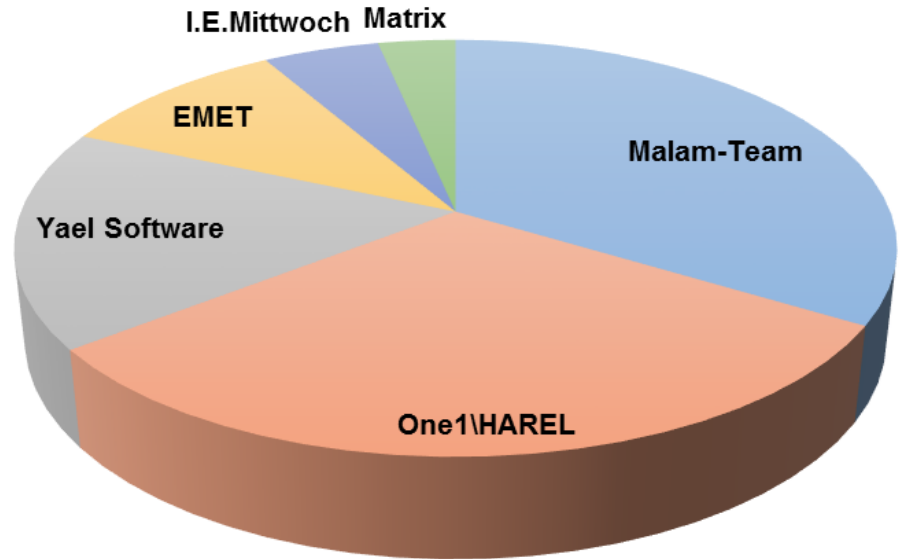
**2013 expected: Smartphones ~ 25% rise
Tablets: doubled**

Market Players: Personal Computing 2012

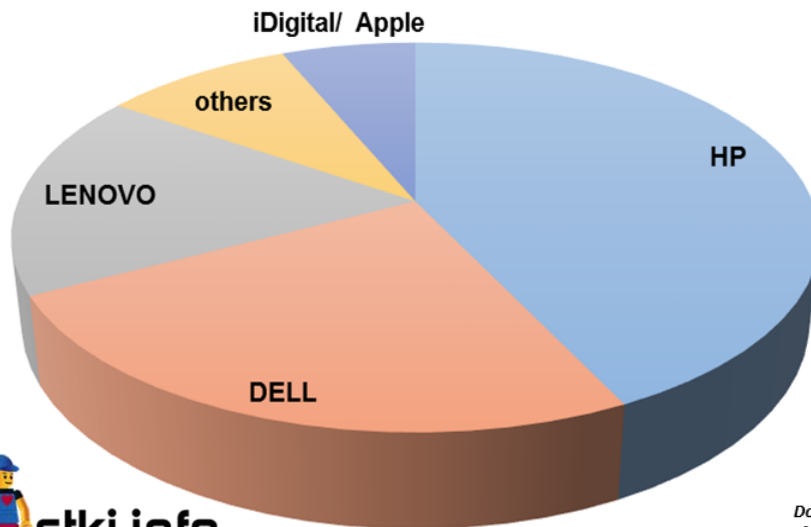
Mobile Personal (manufacturers)



Computing Personal (VARs)



Personal Desktop (manufacturers)



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CLIENT MINDSHARE

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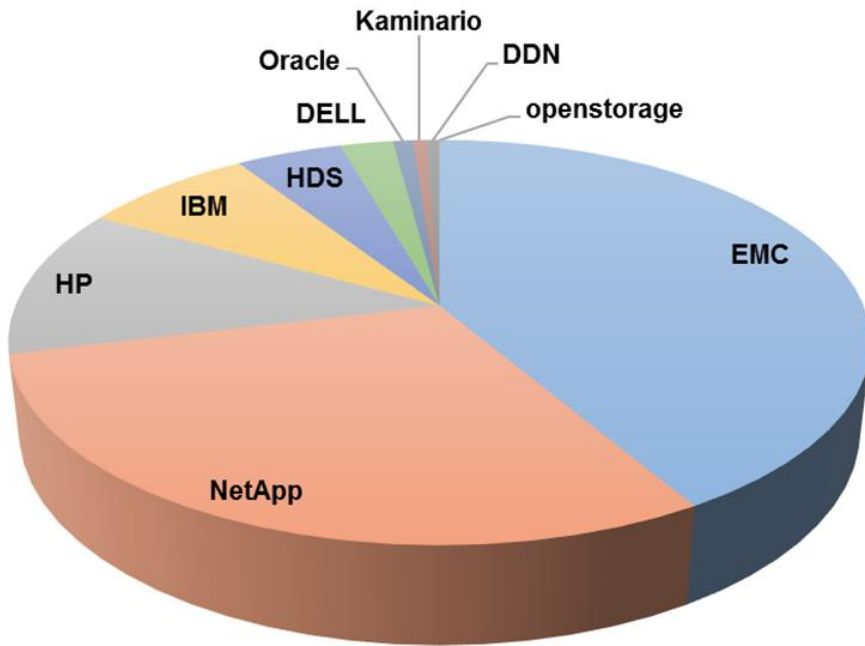
Israel 2011-15 Market : “storage” market



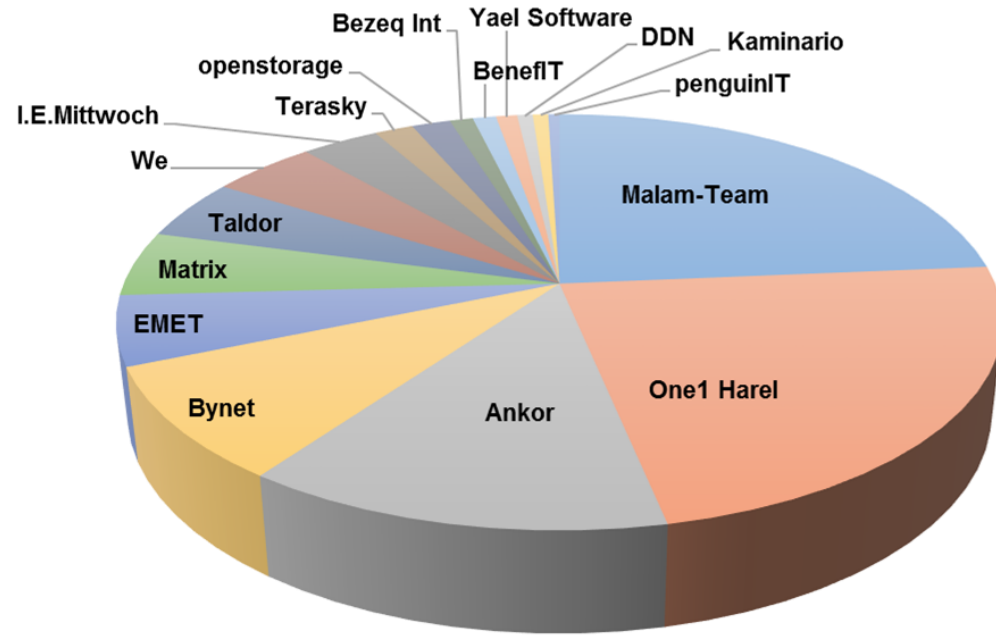
	2011		2012		2013		2014		2015
disks	165.0	3.03%	170.0	4.71%	178.0	4.49%	186.0	4.84%	195.0
VTL backup appliances	15.0	0.00%	25.0	40.00%	35.0	20.00%	42.0	19.05%	50.0
tapes	15.0	-20.00%	12.0	-16.67%	10.0	-10.00%	9.0	-11.11%	8.0
totals	195.0	6.15%	207.0	7.73%	223.0	6.28%	237.0	6.75%	253.0



Market Players: "storage" 2012



Storage "DISKS" (manufacturers)



Storage "disks" (VARs)



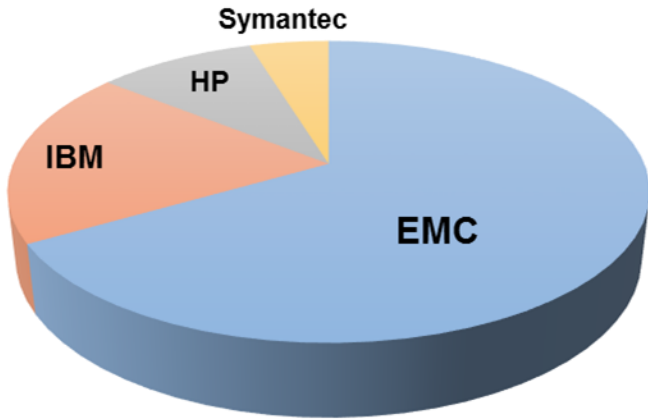
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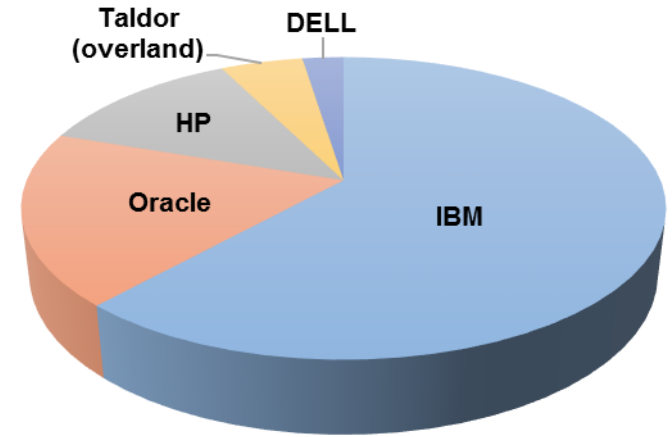


Market Players: "storage" 2012

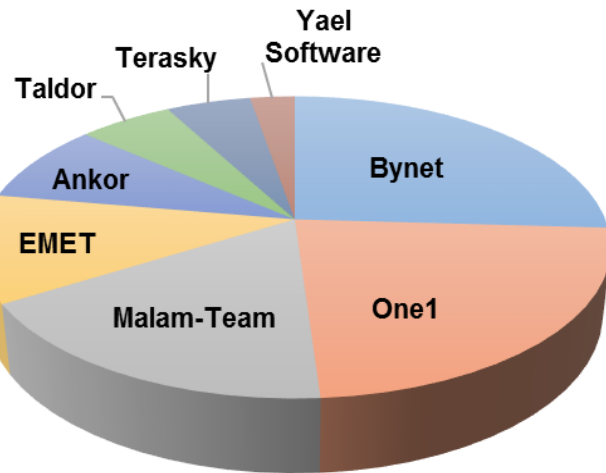
VTL backup appliances (manufacturers)



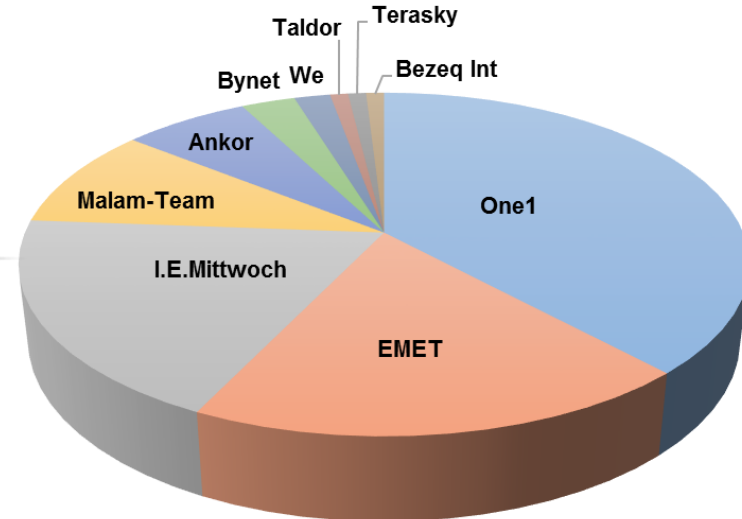
Tape Libraries (manufacturers)



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and
CLIENT MINDSHARE



VTL backup appliances (VARs)



Tape Libraries (VARs)



Israel 2011-15 Market : Networking/security/DC markets

	2011		2012		2013		2014		2015
enterprise networking	192.0	9.38%	210.0	0.95%	212.0	2.83%	218.0	3.21%	225.0
security equipment	75.0	9.33%	82.0	3.66%	85.0	11.76%	95.0	10.53%	105.0
VoIP/call center	55.0	9.09%	60.0	5.00%	63.0	3.17%	65.0	7.69%	70.0
totals	322.0	9.32%	352.0	2.27%	360.0	5.00%	378.0	5.82%	400.0



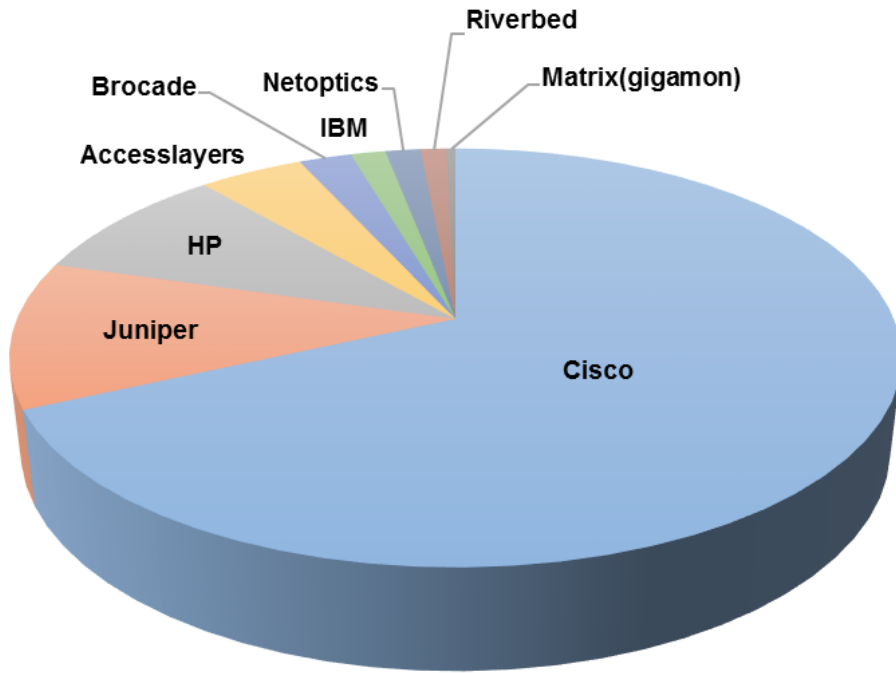
	2011		2012		2013		2014		2015
Data Center Physical Infrastructure	70.0	5.71%	74.0	22.97%	91.0	4.40%	95.0	5.26%	100.0
miscellaneous: Computer Supplies	69.0	0.00%	69.0	0.00%	69.0	0.00%	69.0	0.00%	69.0
totals	139.0	2.88%	143.0	11.89%	160.0	2.50%	164.0	3.05%	169.0

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and
CLIENT MINDSHARE
All amounts in M \$ USD

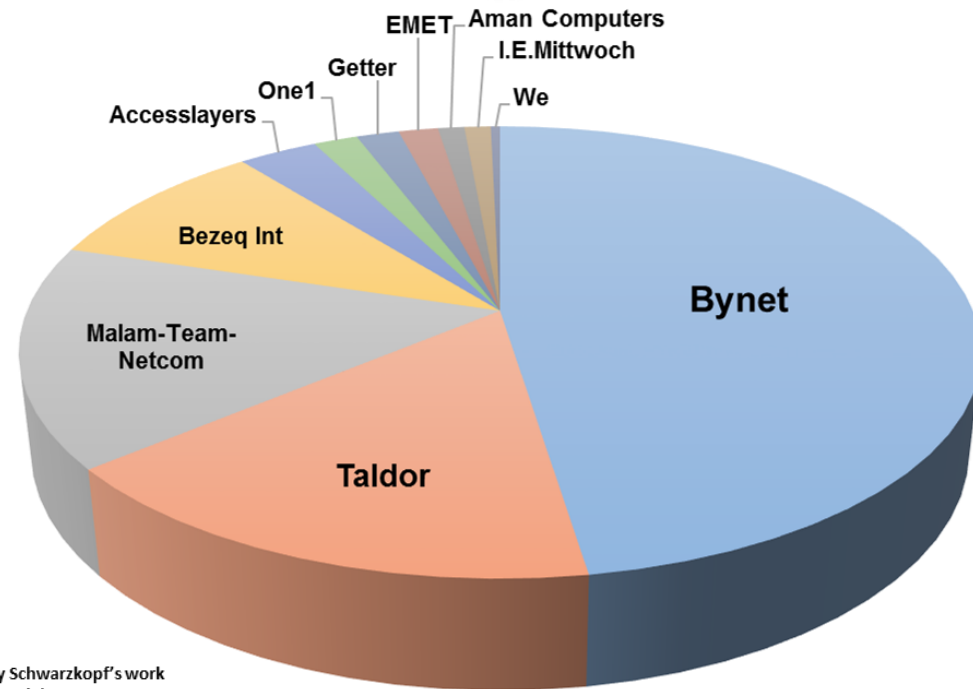
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Market Players: Networking 2012



Enterprise Networking (manufacturers)



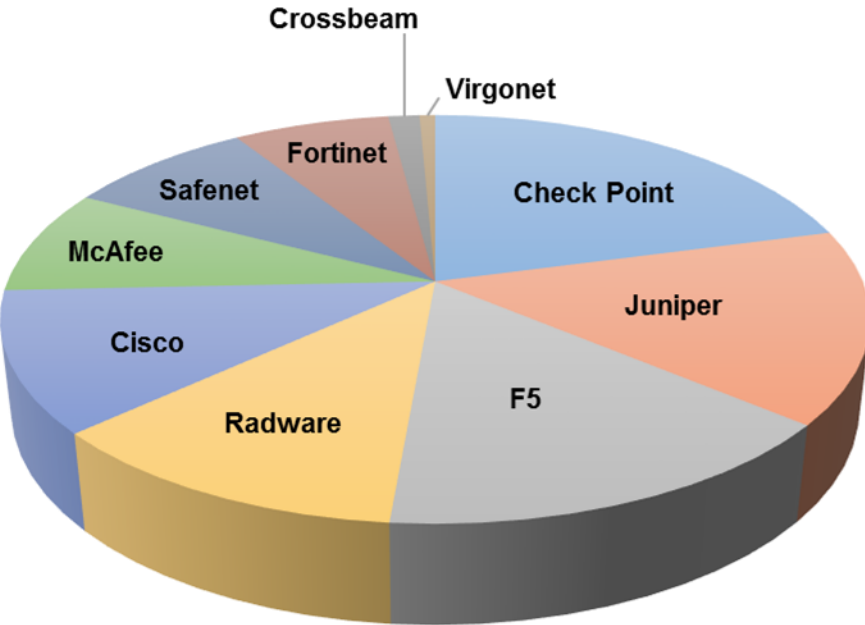
Enterprise Networks (VARs)

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

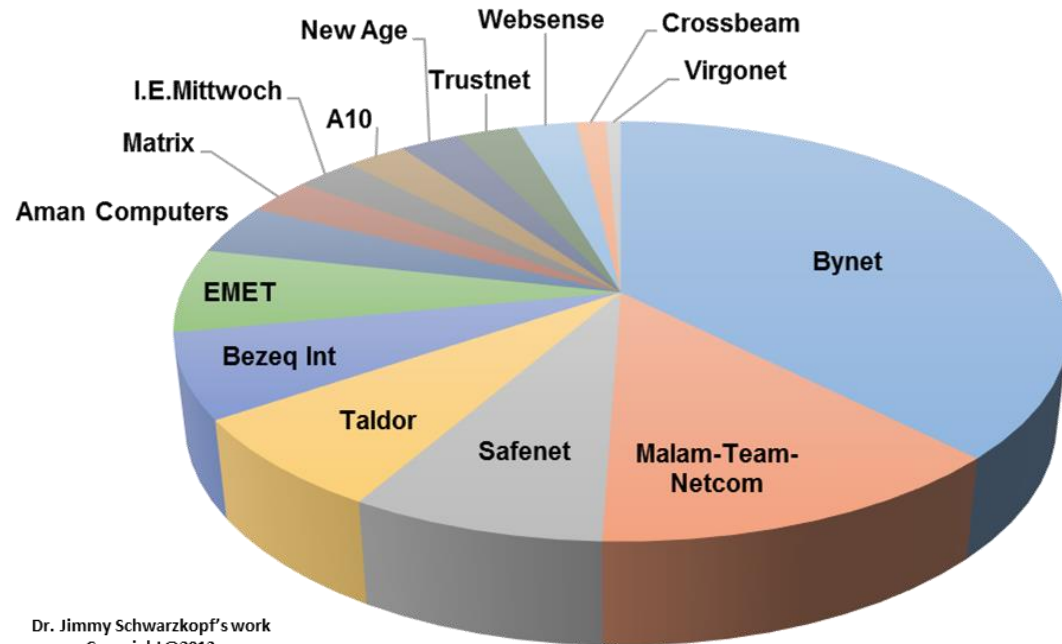
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Market Players: Security Devices 2012



Security Devices (manufacturers)



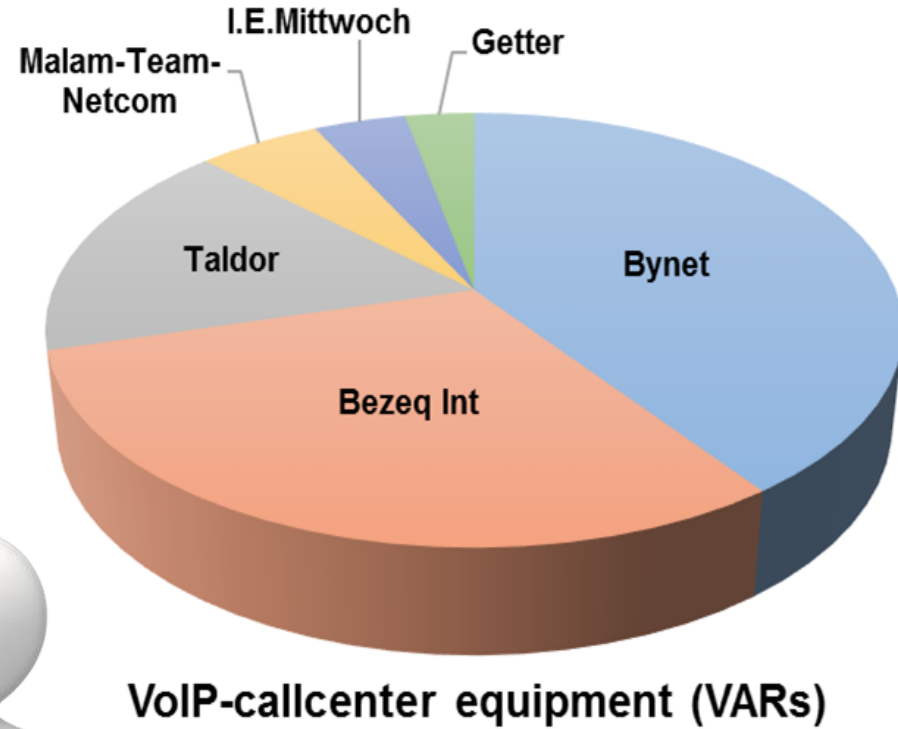
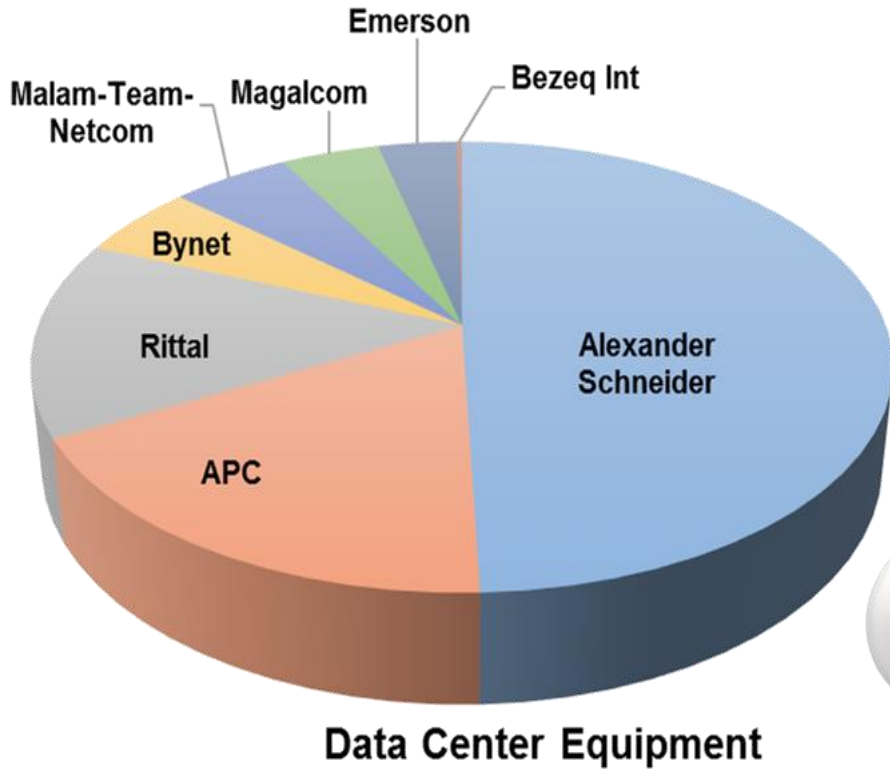
Security Devices (VARs)

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Market Players: VoIP & DC equipment 2012



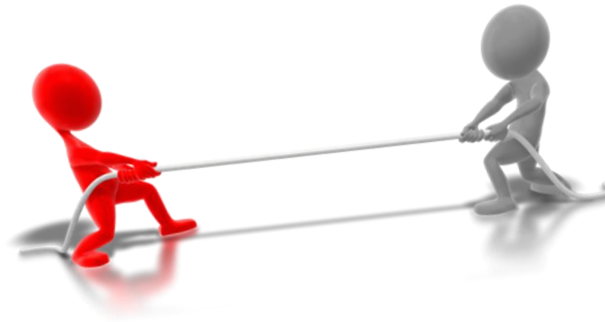
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Israel 2011-15 Market : infrastructure appliance market

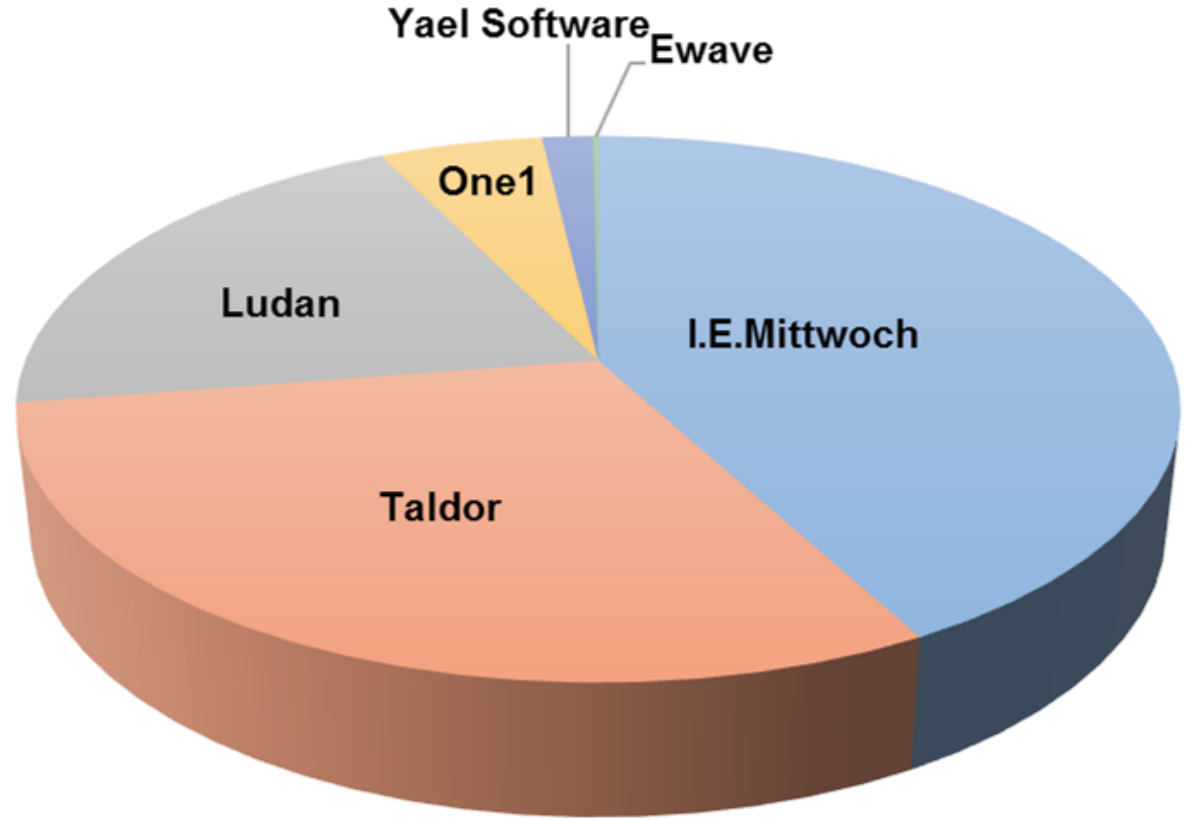
	2011		2012		2013		2014		2015
printers	119.0	-7.56%	110.0	-13.64%	95.0	-3.16%	92.0	-2.17%	90.0
toners/ink/refille	85.0	4.71%	89.0	-15.73%	75.0	-2.67%	73.0	-4.11%	70.0
totals	204.0	-2.45%	199.0	-14.57%	170.0	-2.94%	165.0	-3.03%	160.0



	2011		2012		2013		2014		2015
Self Service Appliances (ATMs, Kiosks, etc)	60.0	3.33%	62.0	20.97%	75.0	13.33%	85.0	5.88%	90.0
Point of Sale Appliances	30.0	6.67%	32.0	9.38%	35.0	20.00%	42.0	7.14%	45.0
totals	90.0	4.44%	94.0	17.02%	110.0	15.45%	127.0	6.30%	135.0



Market Players: Self-service Systems 2012



Self-service (ATM/Kiosks/others) Systems

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Software Market : Tiers

2013 Israel Software Market

Israel: IT Software Total Market 2011-2015

2011		2012		2013		2014		2015	
\$1,193	6.37%	\$1,269	9.12%	\$1,385	6.93%	\$1,481	6.21%	\$1,573	

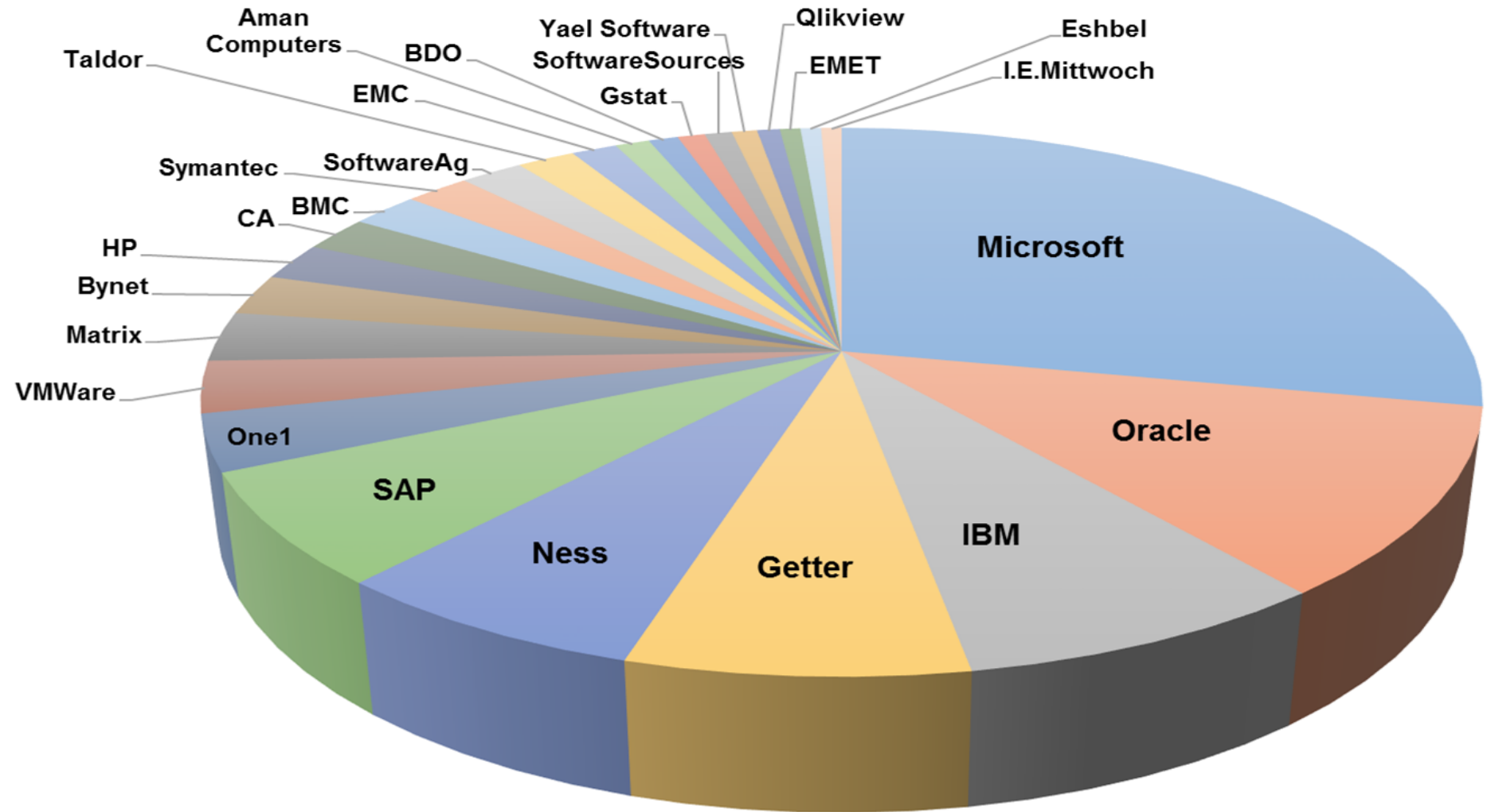


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Vendors that sell in the Software markets



Biggest Software Vendors & VARs

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Software Categories 1

System Infrastructure	operating systems	מערכות הפעלה	מערכות תשתיות
	data bases	בסיסי נתונים	
	middleware	כלי תוכנה	
	other	אחר	
IT Mgmt Tools	Service Desk	Service Desk	מערכות ניהול
	System Control & Mgmt Systems (BSM, APM, BTM)	שליטה ובקרה (כל הסוגים כולל חויית משתמש, ניטור טרנזאקציות וכד')	
	storage & backup	אחסון וגיבוי	
	Security	אבטחת מידע	
	other	אחר	
Office of the CIO	Project & Portfolio Management	ניהול פרויקטים 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	כלי ניהול למידה - LMS	
	other	אחר	

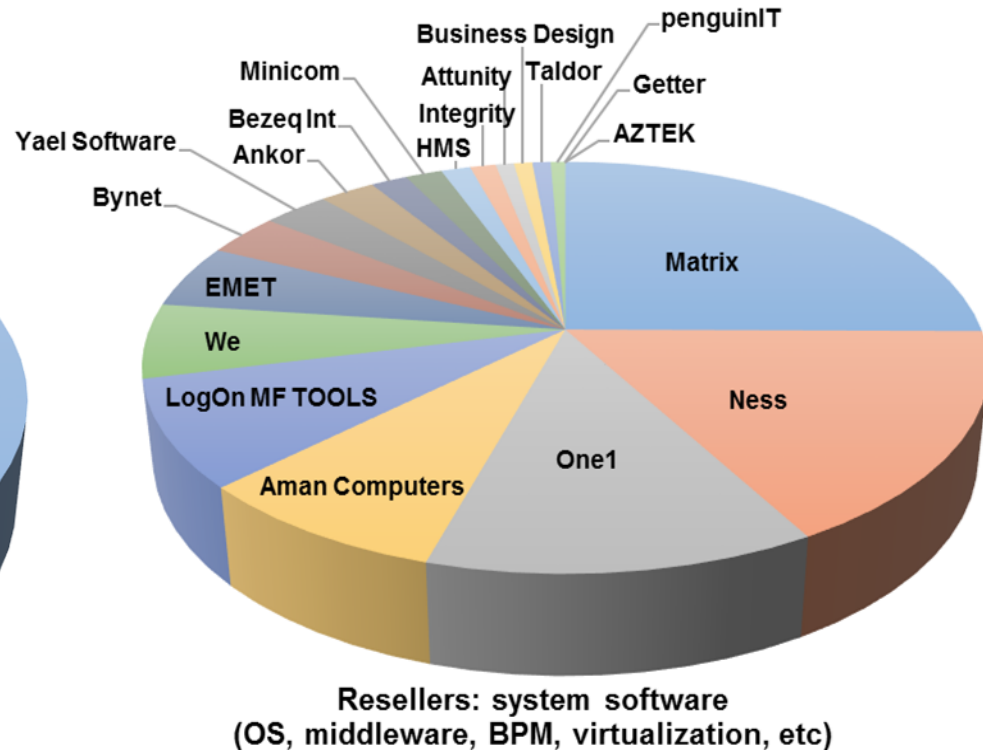
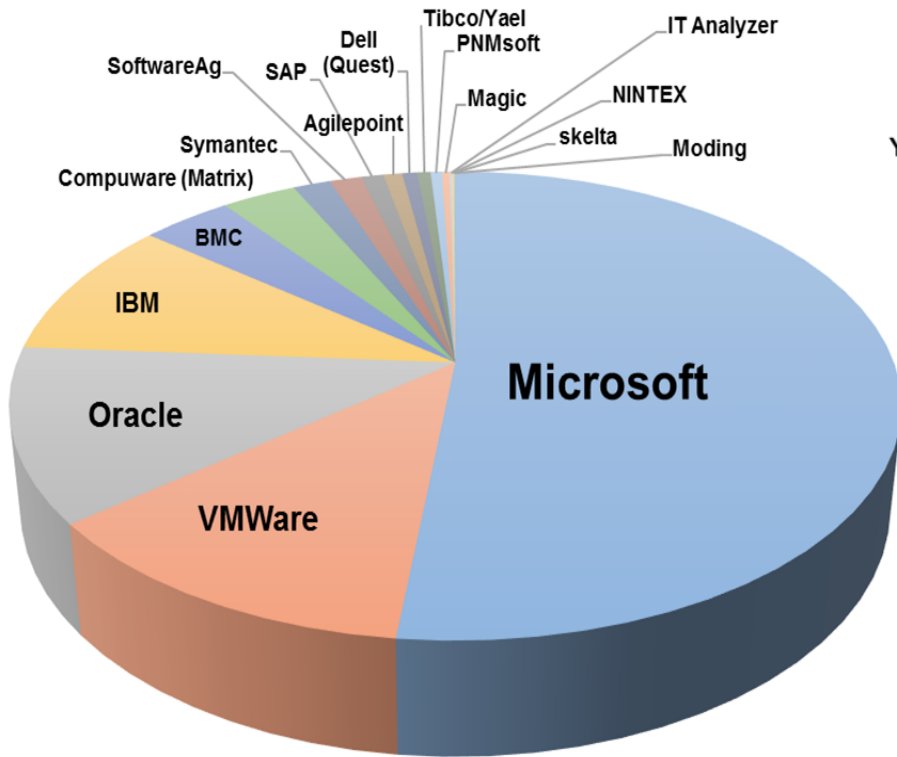
Israel 2011-15 Market : Infrastructure software market



	2011		2012		2013		2014		2015
system software (OS, middleware, virtualization etc)	143.0	4.90%	150.0	6.67%	160.0	9.38%	175.0	8.57%	190.0
data bases	65.0	27.69%	83.0	2.41%	85.0	8.24%	92.0	3.26%	95.0
totals	208.0	12.02%	233.0	5.15%	245.0	8.98%	267.0	6.74%	285.0



Market Players: system software 2012

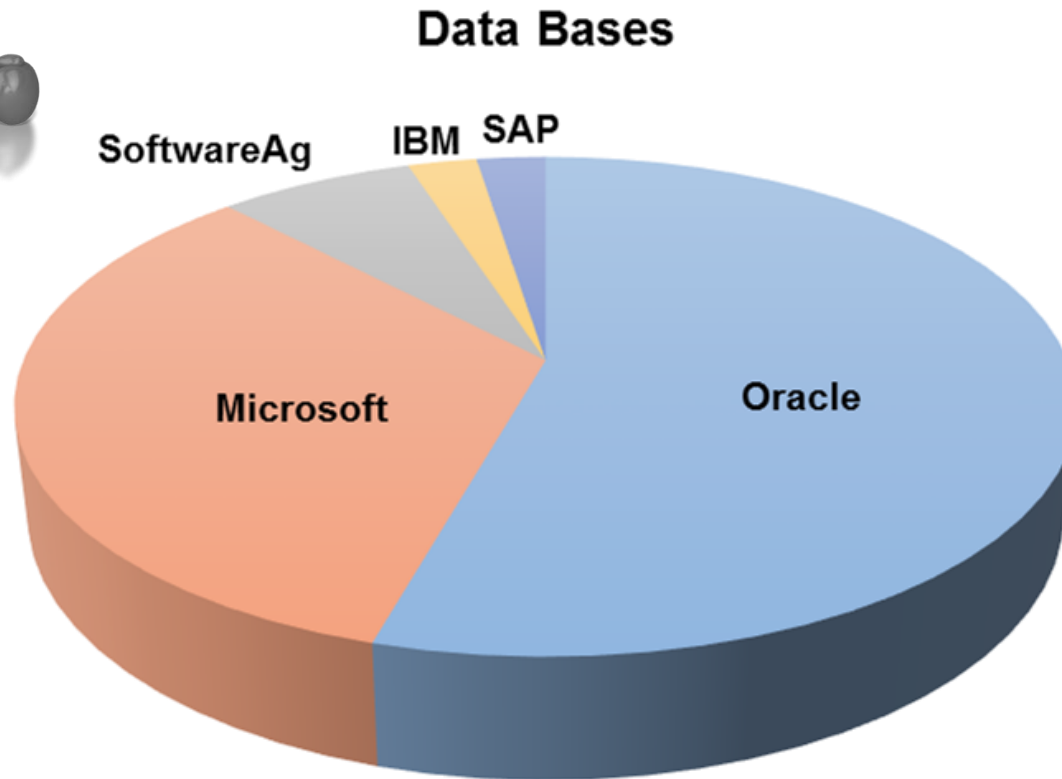
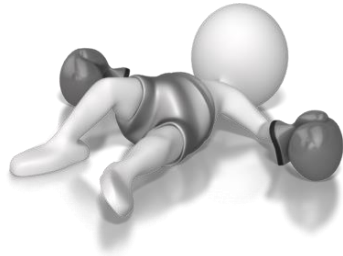


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Market Players: Data Bases 2012



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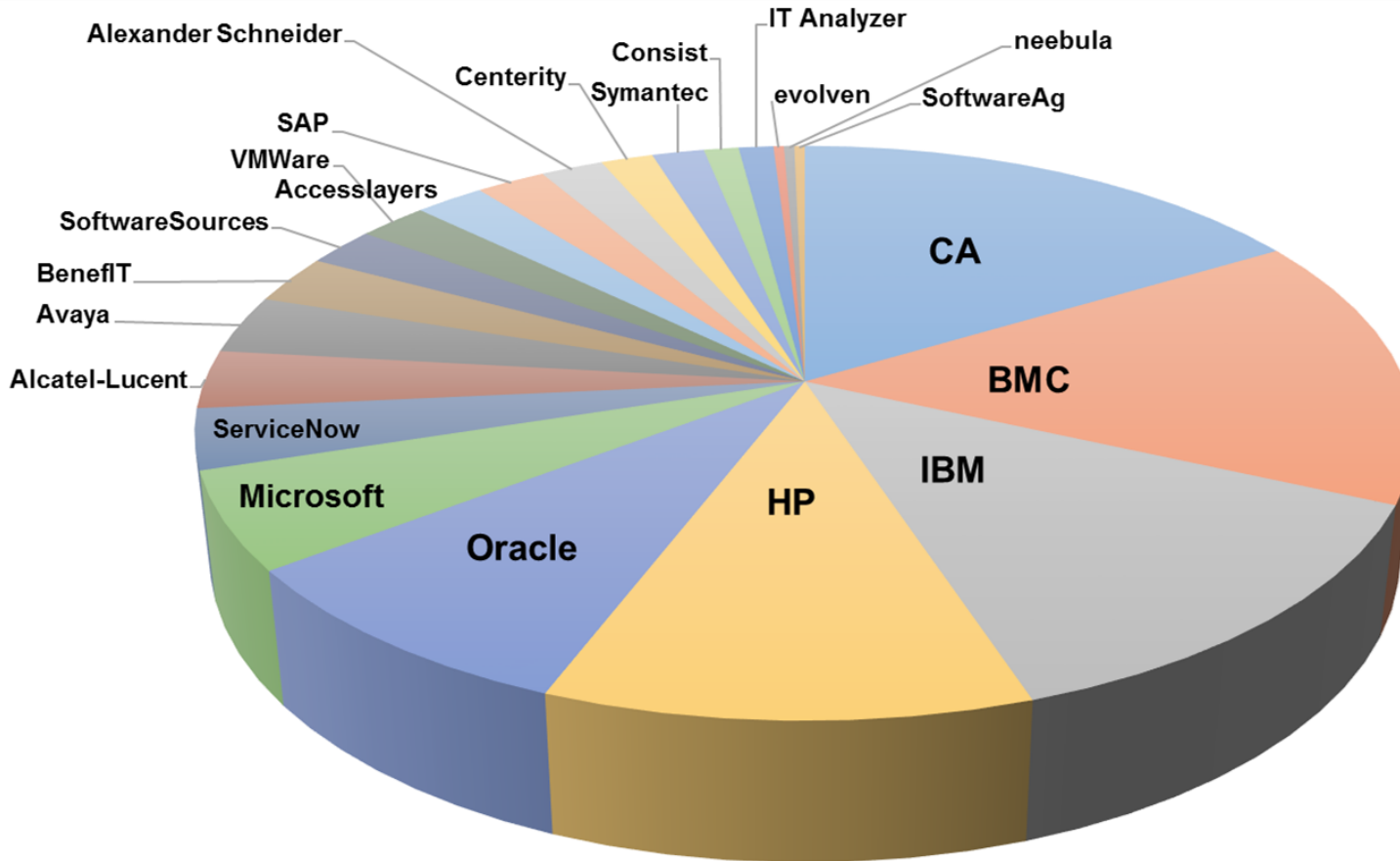
Israel 2011-15 Market : Infrastructure Management Tools



	2011		2012		2013		2014		2015
ITSM (Asset Management, Service	90.0	5.56%	95.0	8.42%	103.0	1.94%	105.0	4.76%	110.0
Storage/ backup	64.0	6.25%	68.0	10.29%	75.0	6.67%	80.0	6.25%	85.0
Security /SIM	127.0	3.94%	132.0	13.64%	150.0	8.00%	162.0	1.85%	165.0
totals	191.0	4.71%	200.0	12.50%	225.0	7.56%	242.0	3.31%	250.0



Market Players: ITSM 2012



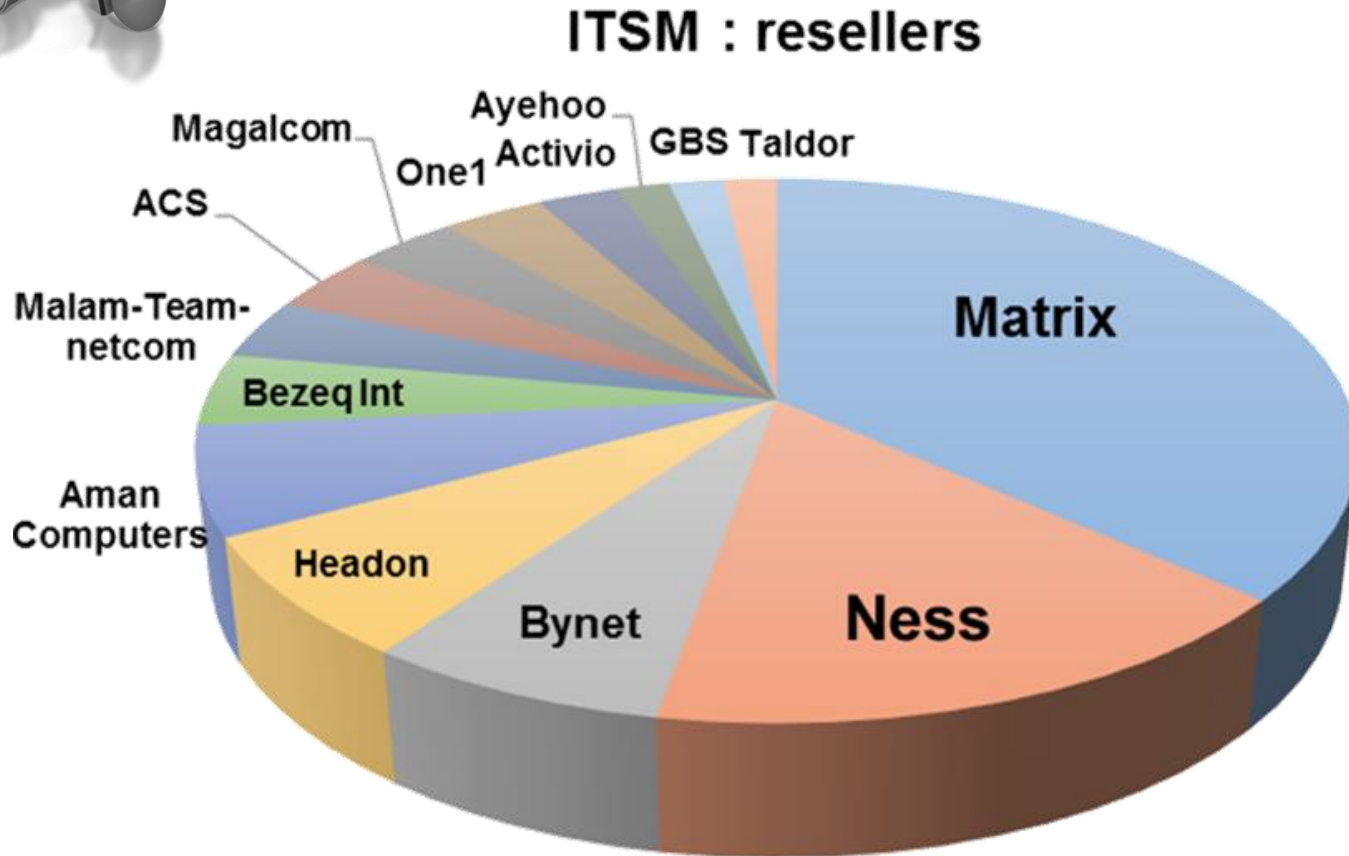
ITSM (Asset Management, Service Desk, Monitoring, etc)

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

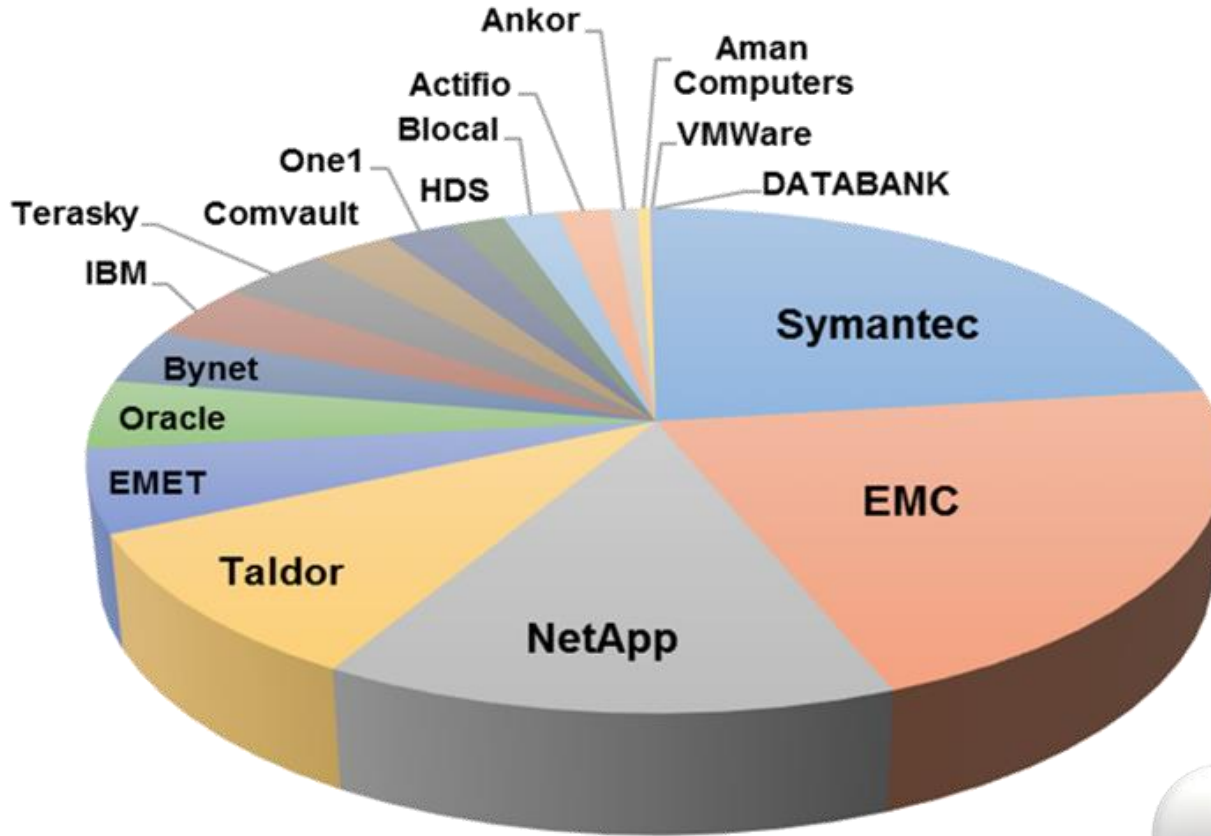
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Market Players: ITSM-resellers 2012



Market Players: Storage and Backup 2012



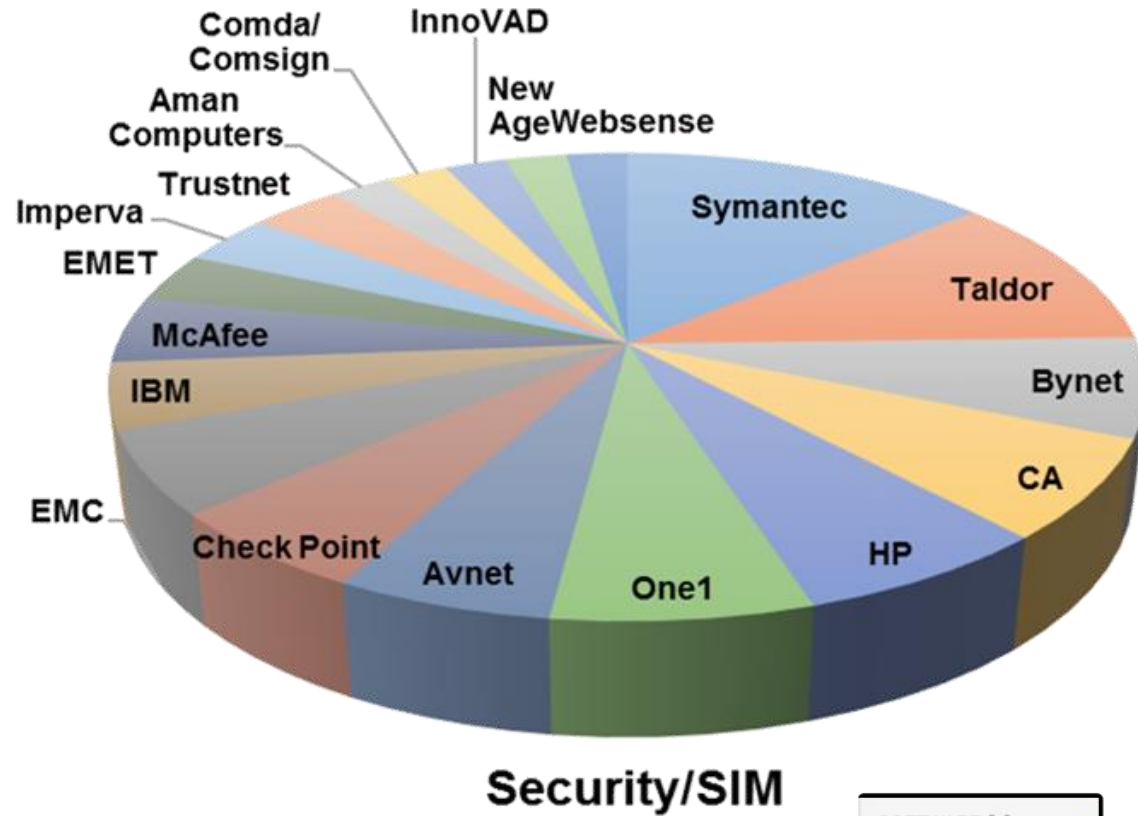
Storage and Backup



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Market Players: Security & SIM 2012



Tier 2
MultiPoint
Promisec
Integrity
AVX
calcom
ForeScout
Fortinet
Wise
BlueCoat
Brillix

Tier 3
Covertix
GreenSQL
Intellinx
Kaspersky Labs
Prolink
Safend
Secure Islands
Varonis
Virgonet
Waterfall
Zebra
We
Checkmarx
SoftwareAg
Ness



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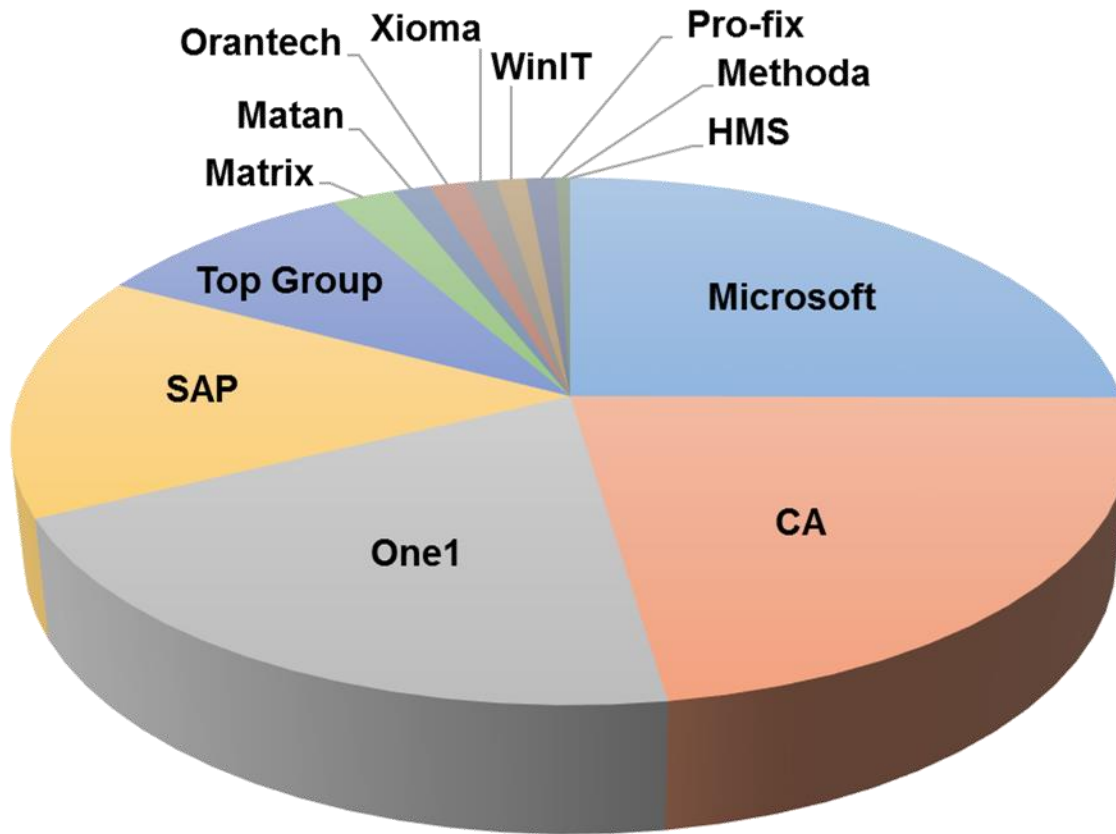
Israel 2011-15 Market : Office of the CIO market



	2011		2012		2013		2014		2015
Project & Portfolio	22.0	18.18%	26.0	3.85%	27.0	11.11%	30.0	16.67%	35.0
Governance, Risk &	21.0	-9.52%	19.0	15.79%	22.0	22.73%	27.0	11.11%	30.0
totals	43.0	4.65%	45.0	8.89%	49.0	16.33%	57.0	14.04%	65.0



Market Players: Project & Portfolio Mgmt 2012



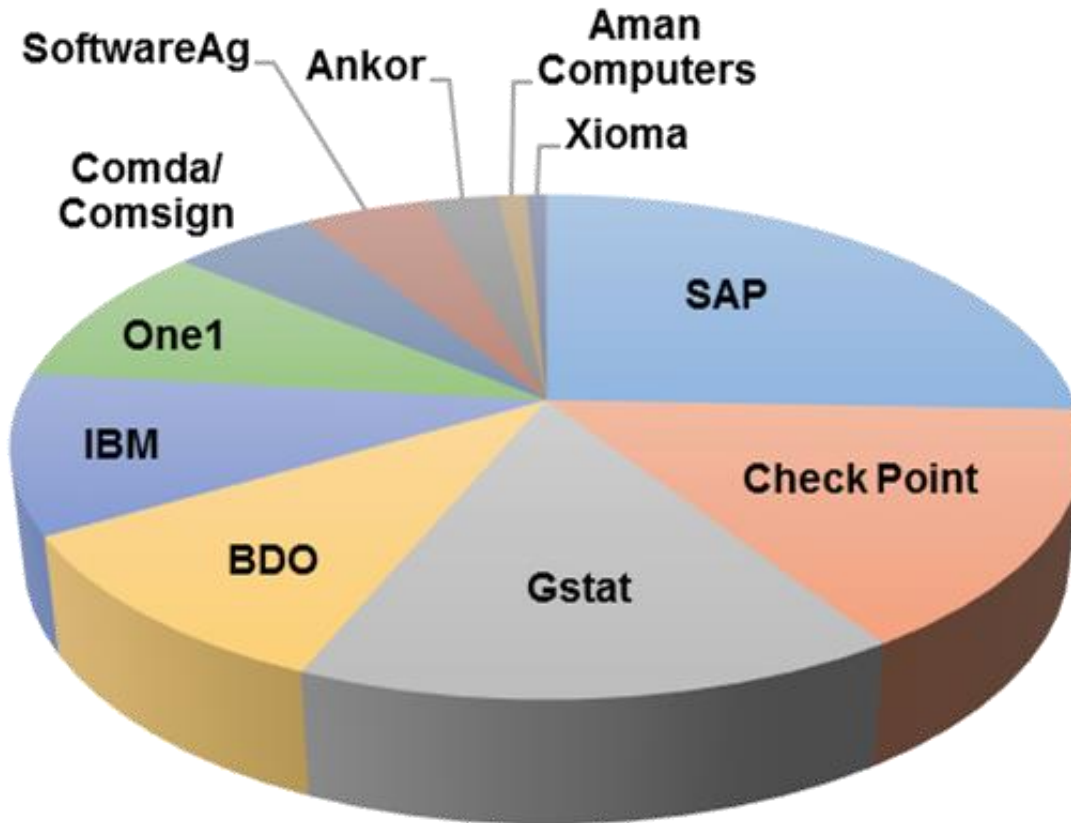
Project and Portfolio Management



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Market Players: GRC 2012



Governance, Risk & Compliance



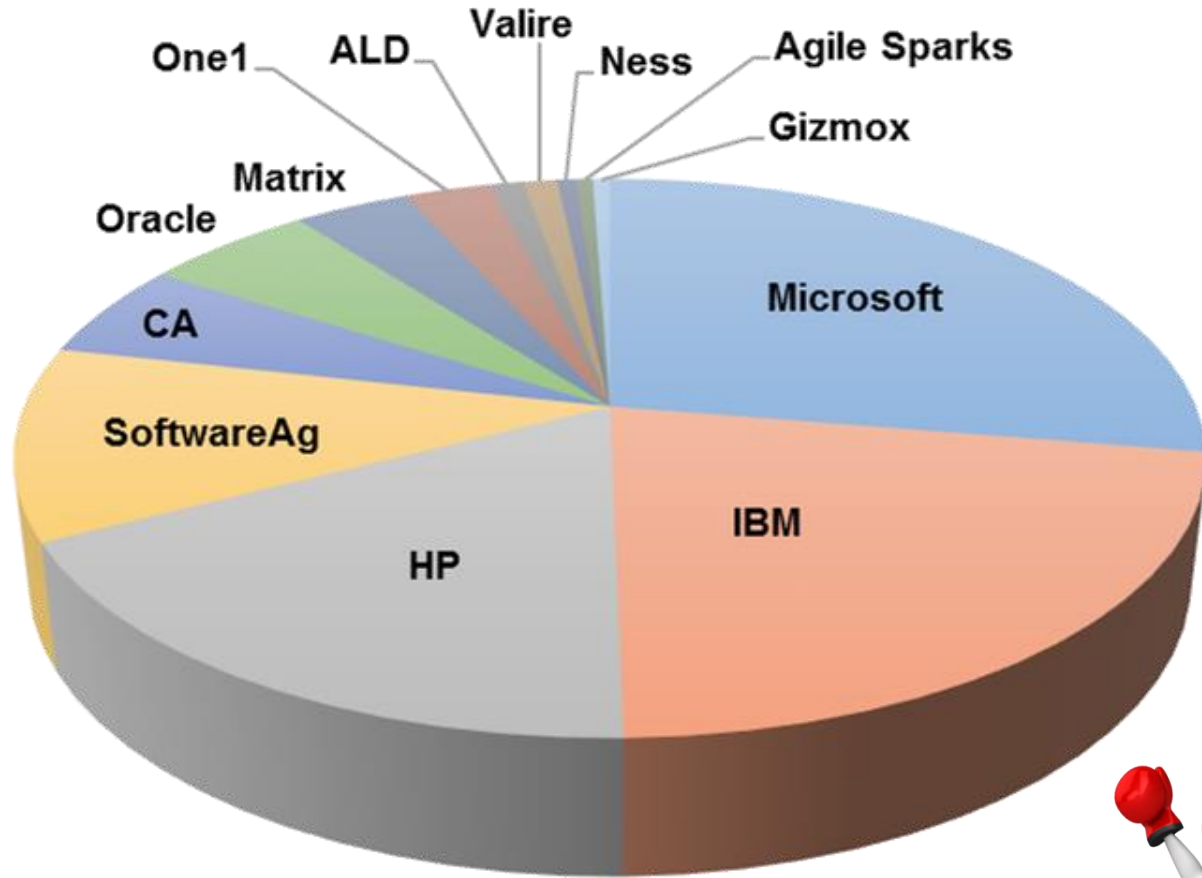
Israel 2011-15 Market : Development Tools market



	2011		2012		2013		2014		2015
development & ALM tools	102.0	1.96%	104.0	-3.85%	100.0	-5.00%	95.0	1.05%	96.0
mobile dev tools	12.0	25.00%	15.0	66.67%	25.0	20.00%	30.0	6.67%	32.0
totals	114.0	4.39%	119.0	5.04%	125.0	0.00%	125.0	2.40%	128.0



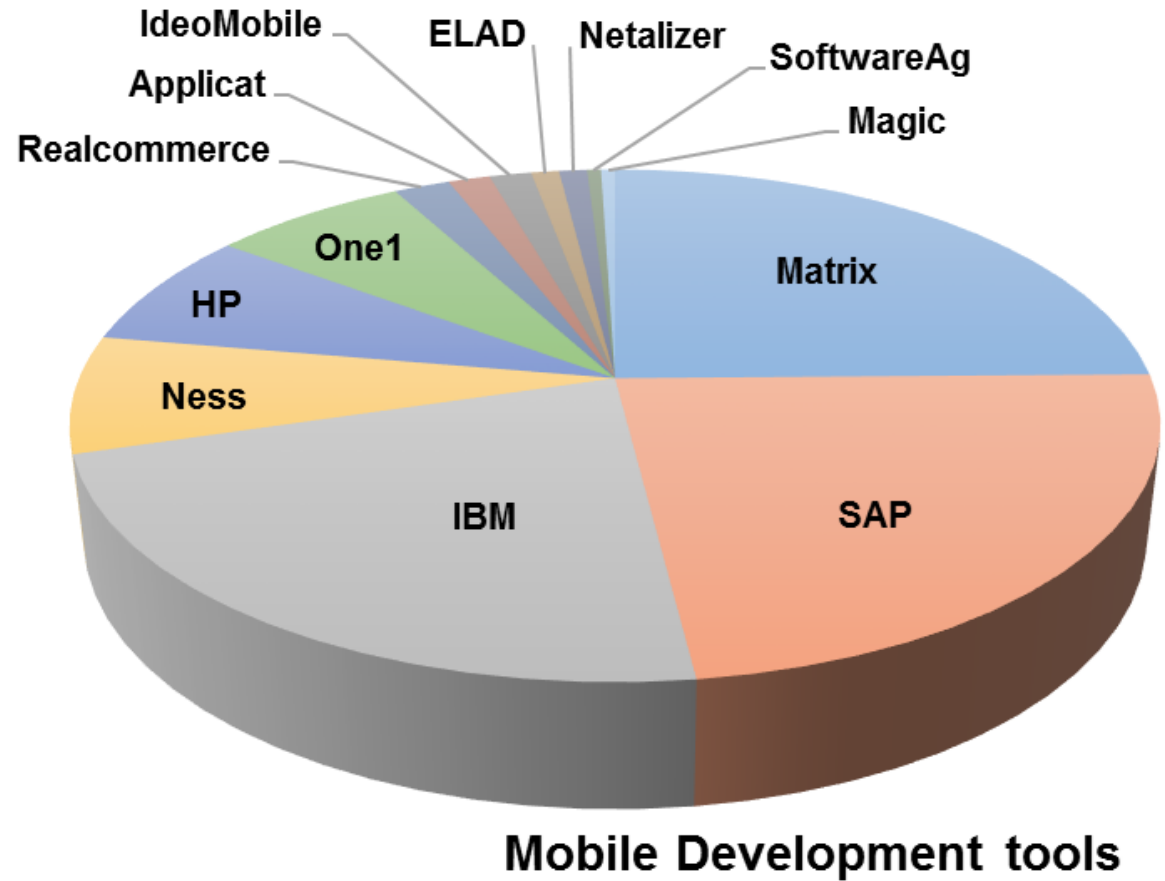
Market Players: Development & ALM tools 2012



Development & ALM (includes testing tools)



Market Players: Mobile Development Tools 2012



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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 אחזור 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	כלי 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/רטיקלים	
	other	אחר	

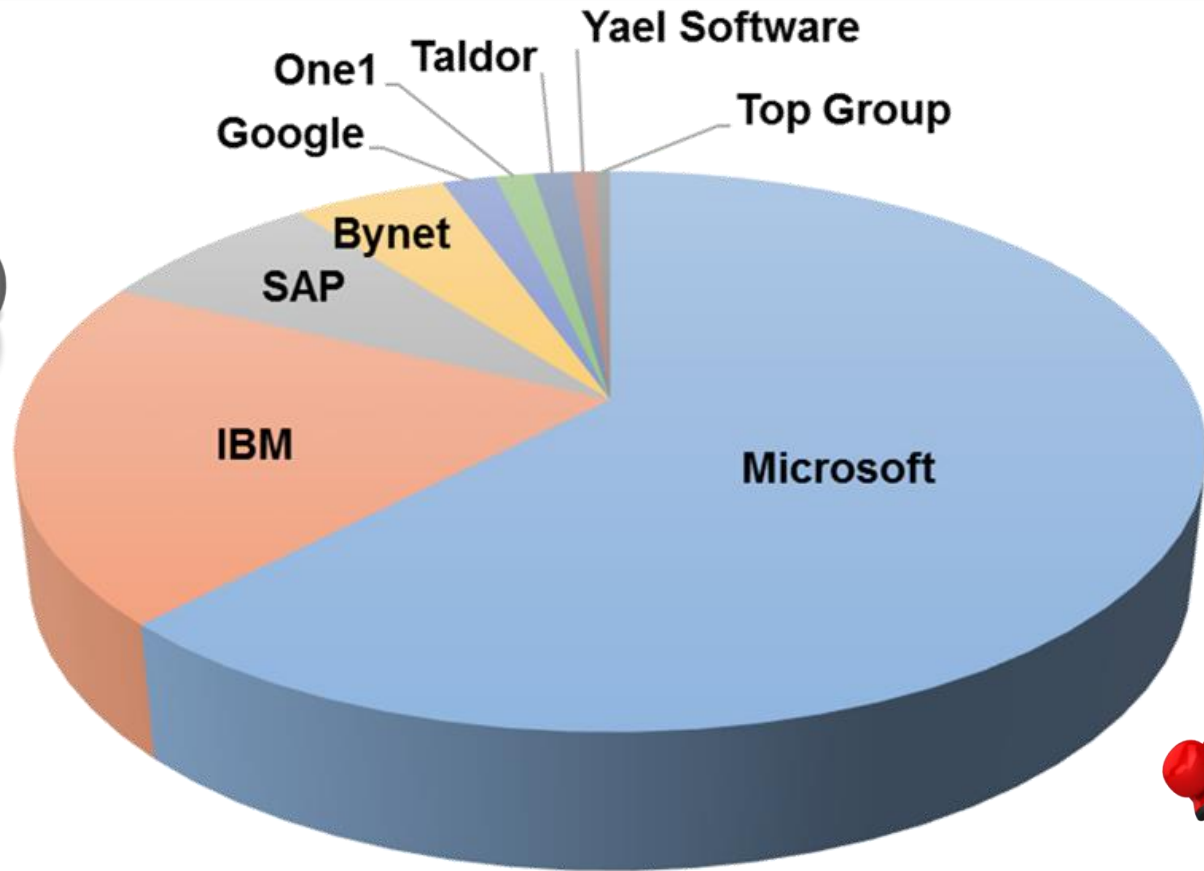
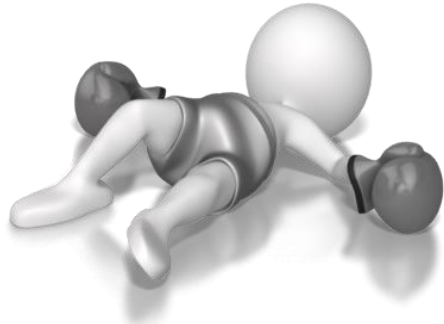
Israel 2011-15 Market : Information Mgmt. Tools market



	2011		2012		2013		2014		2015
Office Productivity (Microsoft Office, etc.)	85.0	2.35%	87.0	5.75%	92.0	3.26%	95.0	5.26%	100.0
Enterprise portals, collaboration & social	62.0	4.84%	65.0	10.77%	72.0	5.56%	76.0	5.26%	80.0
Document mgmt and	32.0	9.38%	35.0	14.29%	40.0	32.50%	53.0	11.32%	59.0
Output mgmt tools	12.0	16.67%	14.0	14.29%	16.0	12.50%	18.0	-5.56%	17.0
Analytics and data	100.0	12.00%	112.0	16.07%	130.0	-4.62%	124.0	6.45%	132.0
totals	291.0	7.56%	313.0	11.82%	350.0	4.57%	366.0	6.01%	388.0



Market Players: Portals, Collaboration, Social Tools 2012



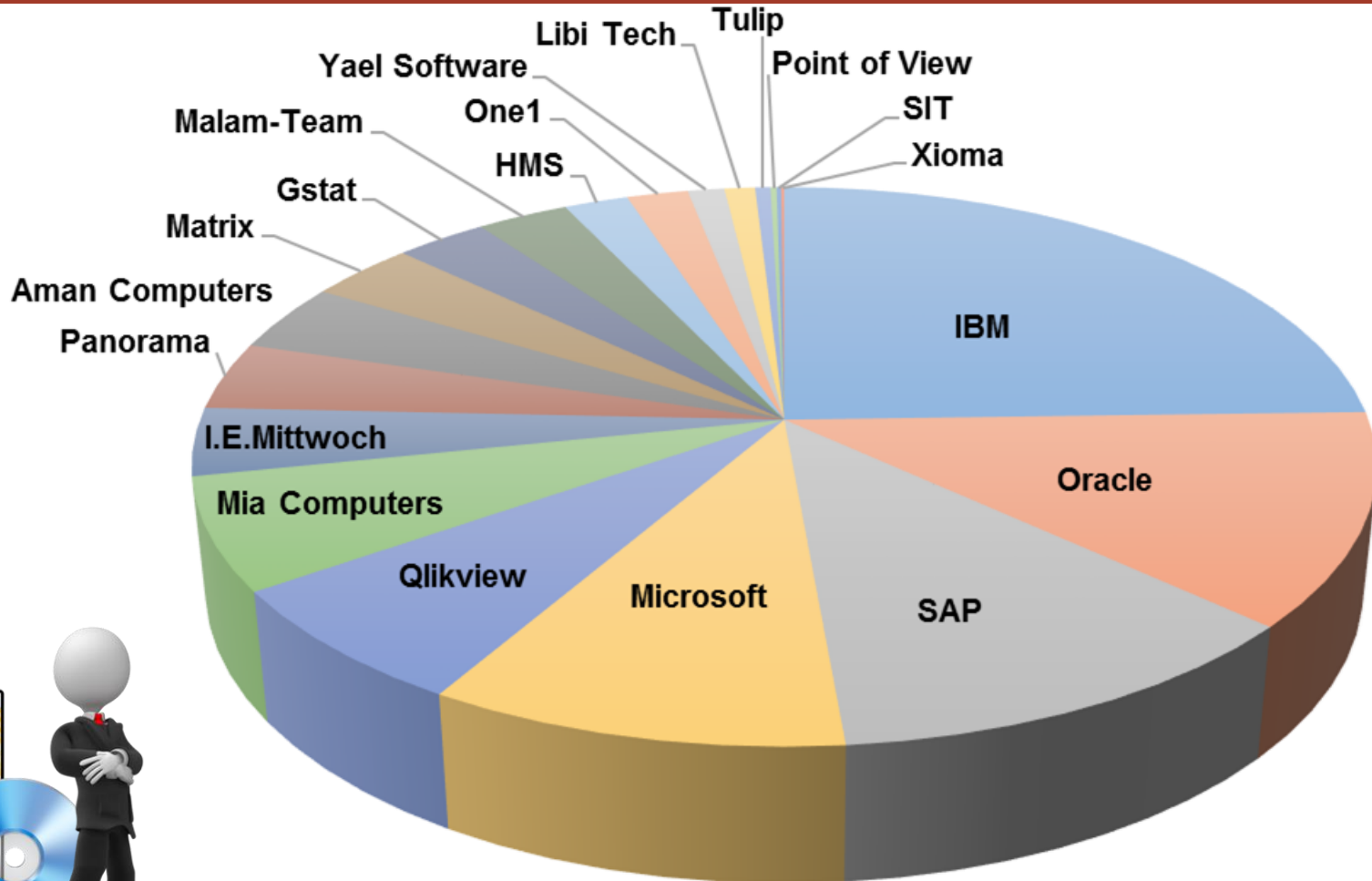
Enterprise Portals, collaboration and Social tools



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Market Players: Analytics & Data Mgmt. Tools 2012



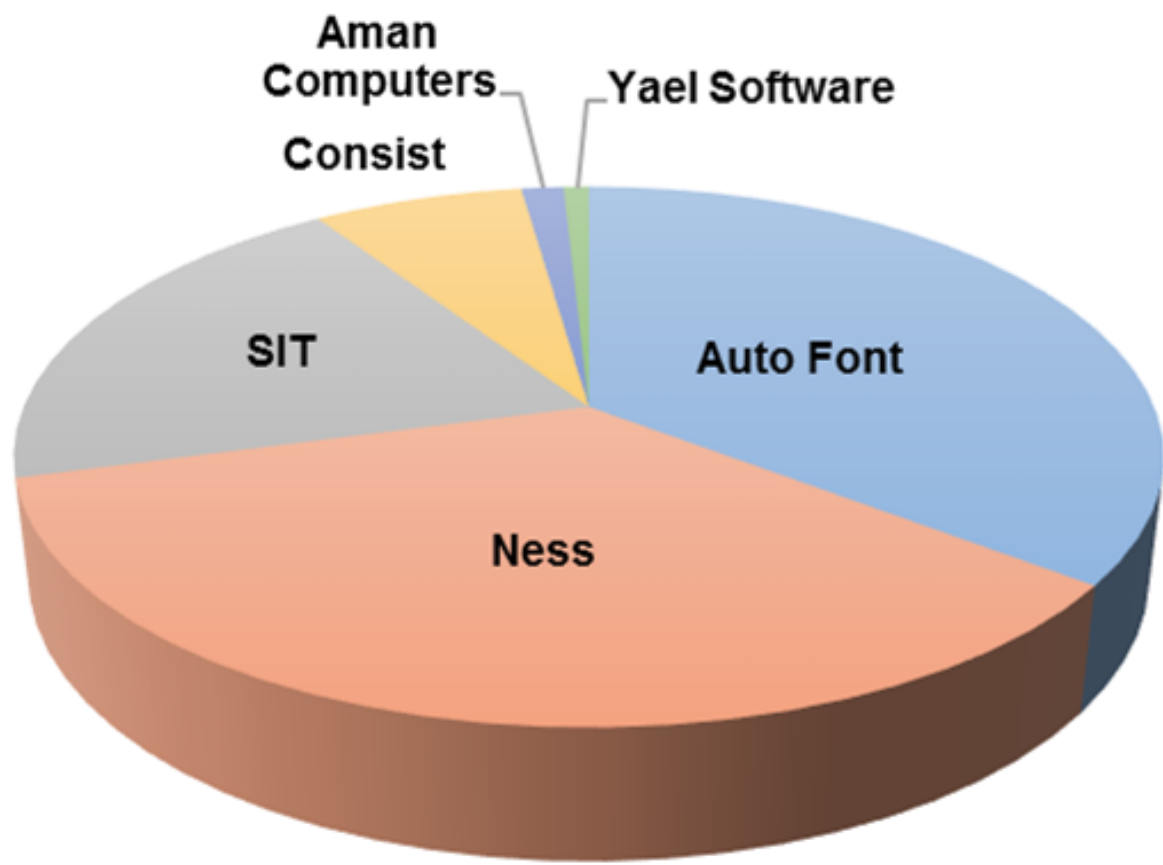
Analytics & Data Management Tools



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Market Players: Output Management Tools 2012



Output Management Tools



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Israel 2011-15 Market : Business Applications market



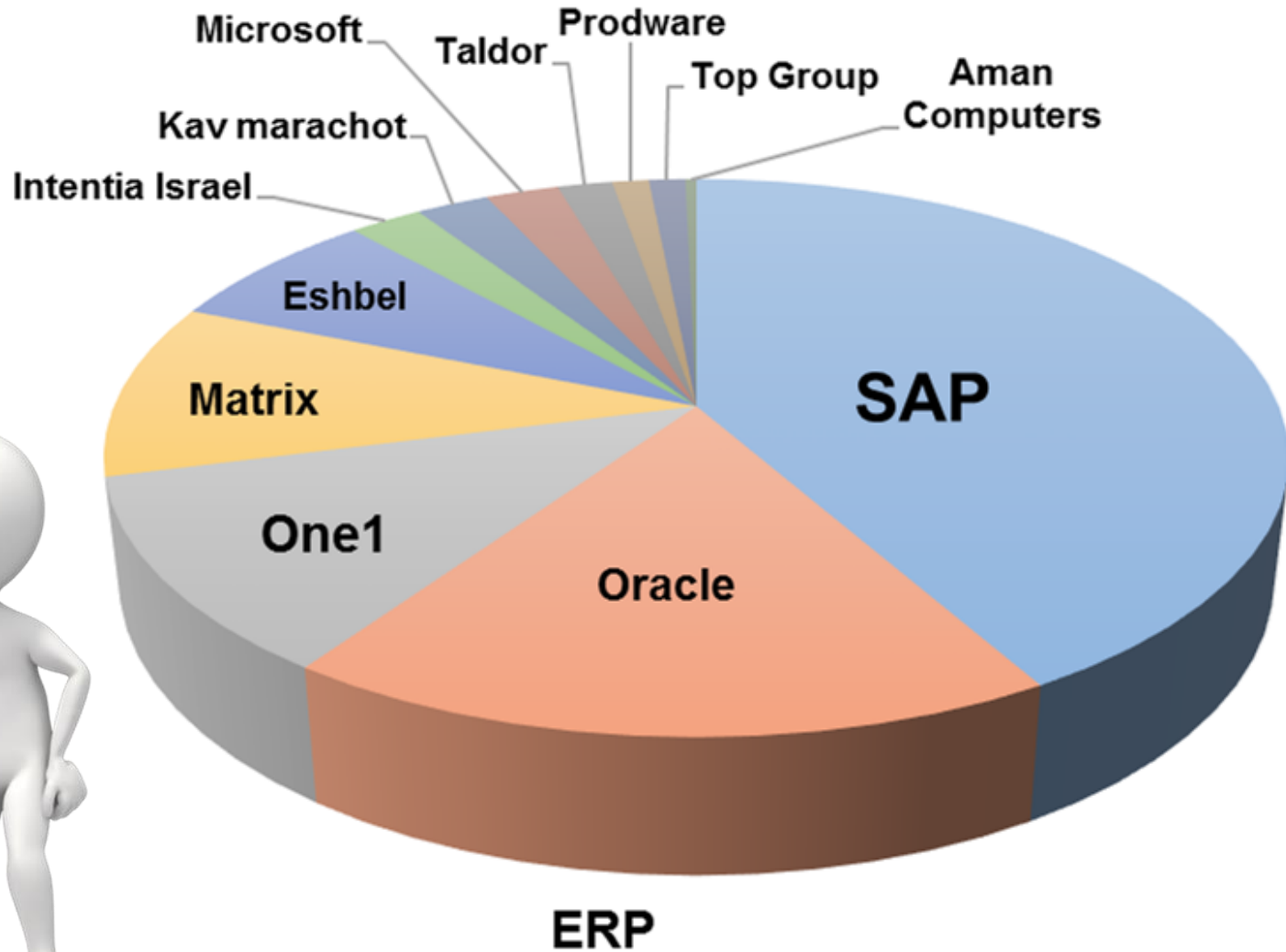
	2011		2012		2013		2014		2015
Vertical (core)	54.0	3.70%	56.0	25.00%	70.0	17.14%	82.0	15.85%	95.0
ERP	115.0	-0.87%	114.0	-3.51%	110.0	1.82%	112.0	2.68%	115.0
CRM	55.0	5.45%	58.0	6.90%	62.0	20.97%	75.0	9.33%	82.0
BPM	15.0	13.33%	17.0	11.76%	19.0	0.00%	19.0	0.00%	19.0
WEB - Social	8.0	15.00%	9.2	63.04%	15.0	20.00%	18.0	16.67%	21.0
PLM	9.2	8.70%	10.0	20.00%	12.0	8.33%	13.0	15.38%	15.0
totals	256.2	3.12%	264.2	9.01%	288.0	10.76%	319.0	8.78%	347.0



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We rank VENDORS by
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All amounts in M \$ USD

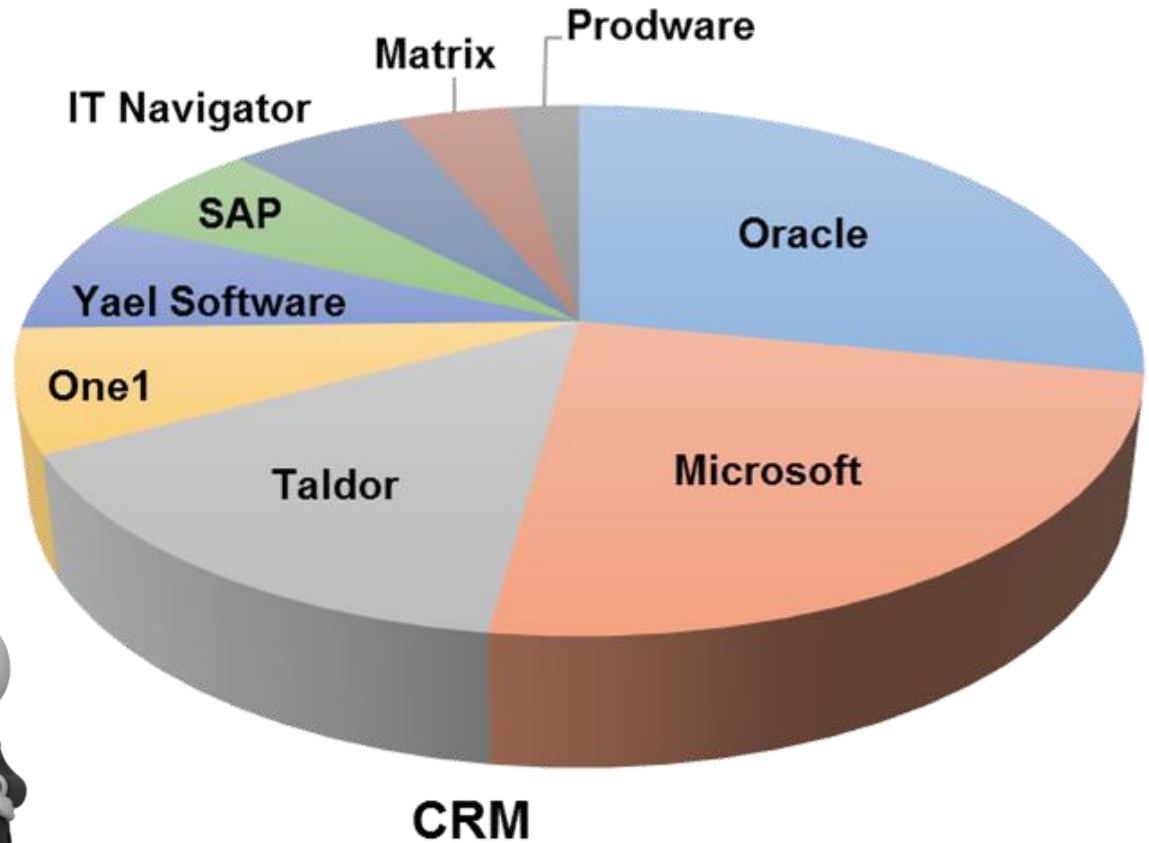
Market Players: ERP 2012



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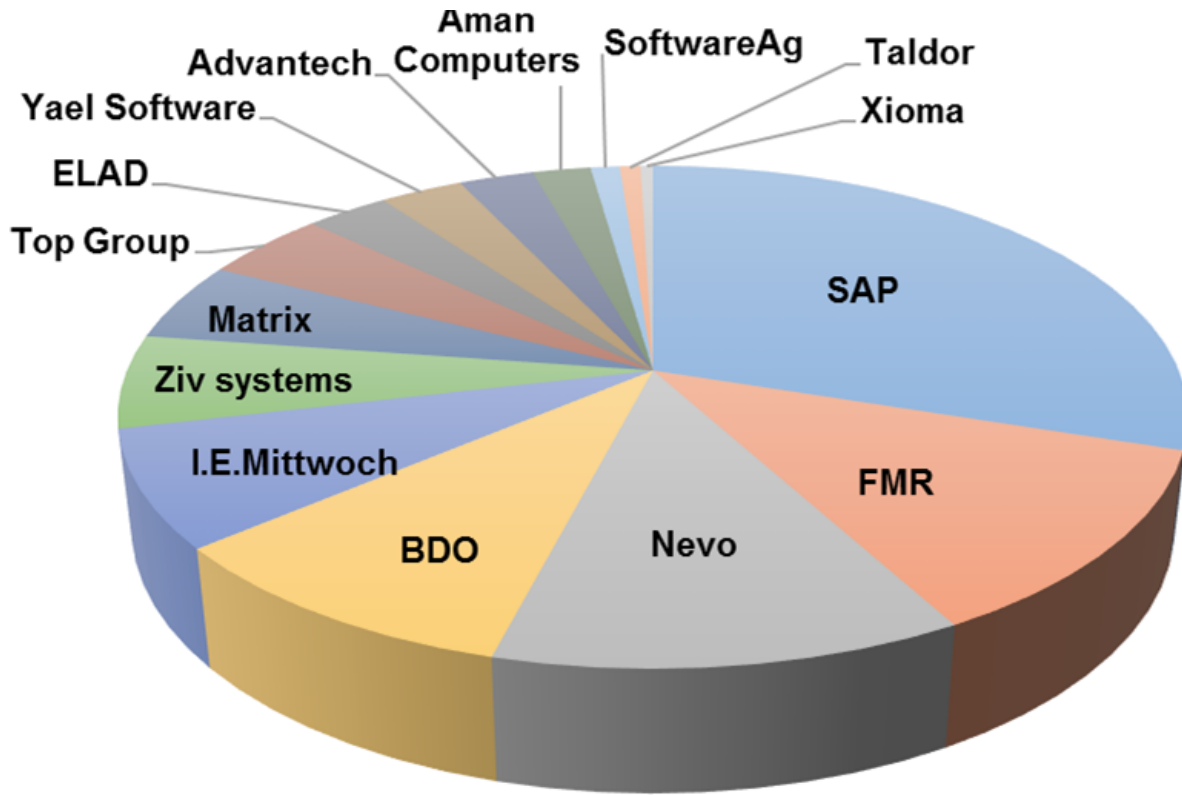
Market Players: CRM 2012



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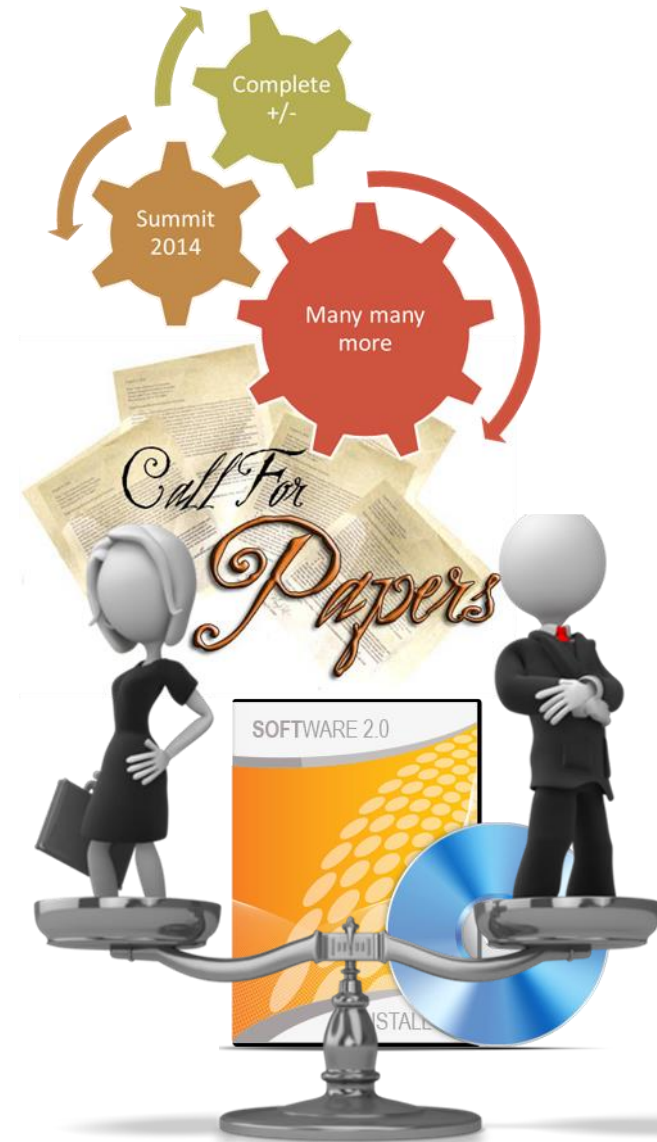
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Market Players: Industry Specific Applications 2012



Industry Specific (core) Applications

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Value Added Services Market : Tiers

2013 Israel Value Added Services Market

Israel: Value Added Services Market 2011-2015



VALUE ADDED SERVICES

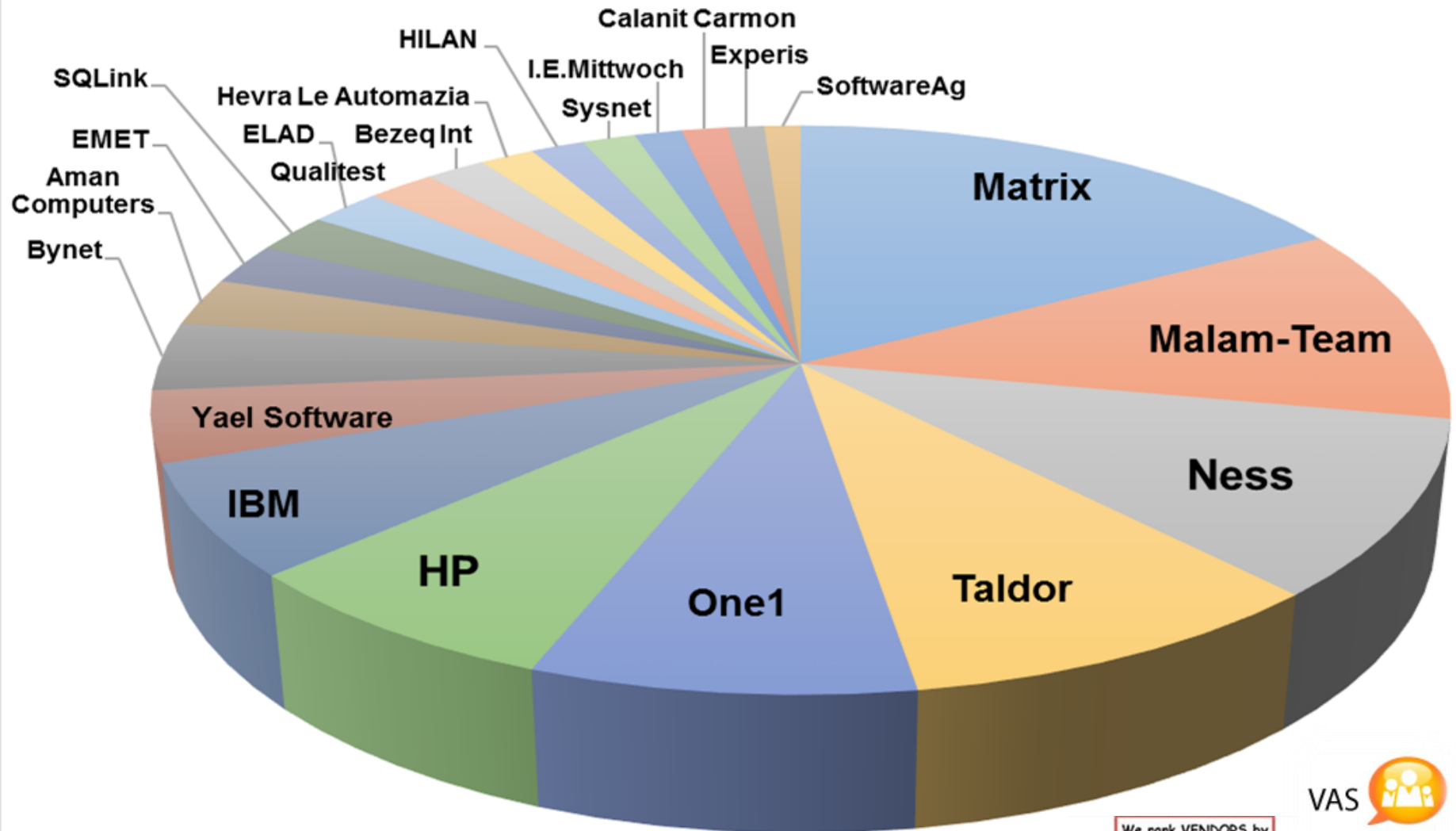
2011		2012		2013		2014		2015	
\$3,488	2.84%	\$3,587	-5.16%	\$3,402	5.09%	\$3,575	6.04%	\$3,791	

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Vendors that sell in the VAS markets

Top VAS Servers in Israel 2012-3



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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	

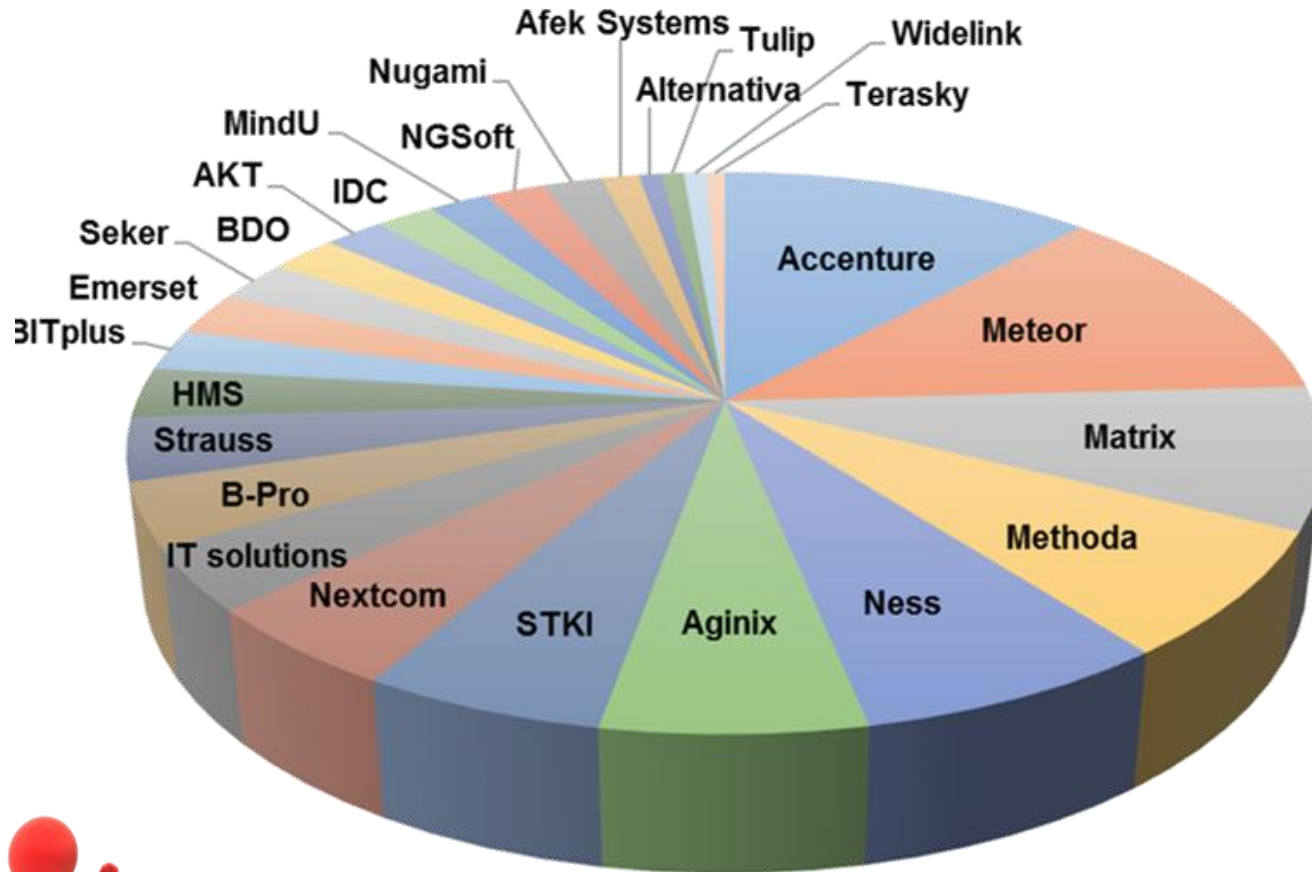
Israel 2011-15 Market : IT Services markets

	2011		2012		2013		2014		2015
IT Consulting/	45.0	4.44%	47.0	10.64%	52.0	5.77%	55.0	5.45%	58.0



	2011		2012		2013		2014		2015
Data Center	45.0	11.11%	50.0	30.00%	65.0	10.77%	72.0	5.56%	76.0

Market Players: IT Consulting 2012



IT Consulting & Analyst Companies

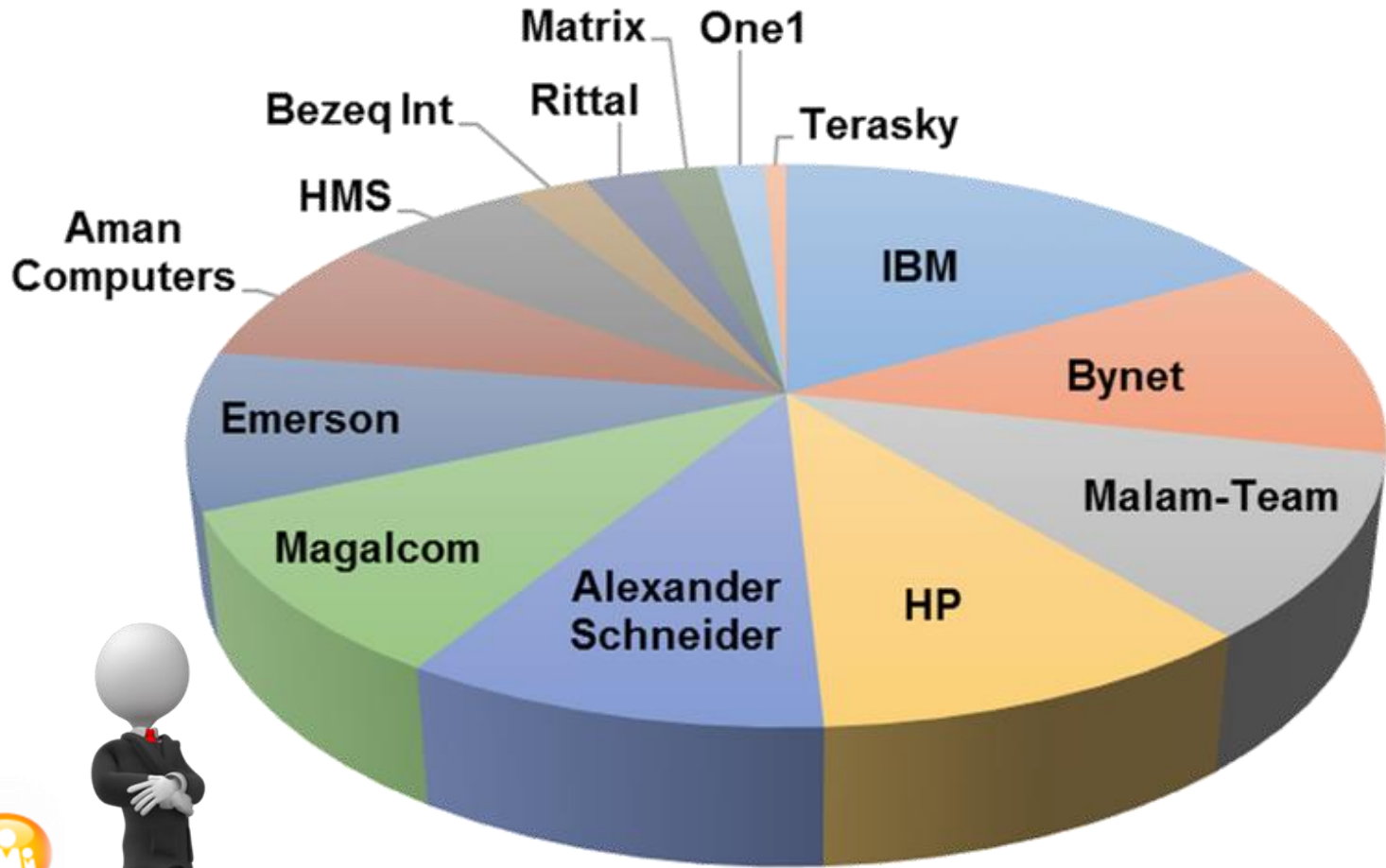


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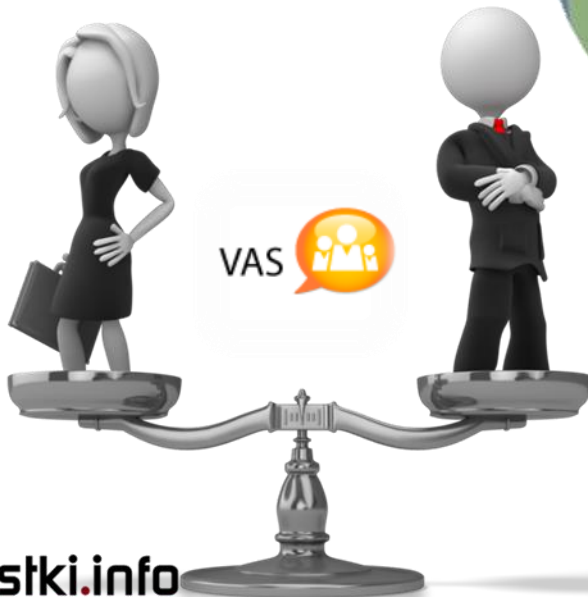
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Market Players: Data Center and DRP projects 2012



Data Center and DRP projects

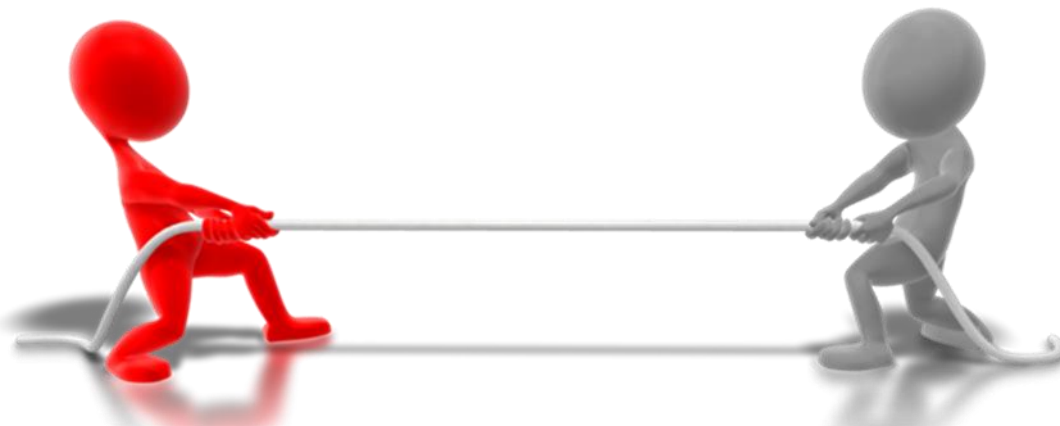


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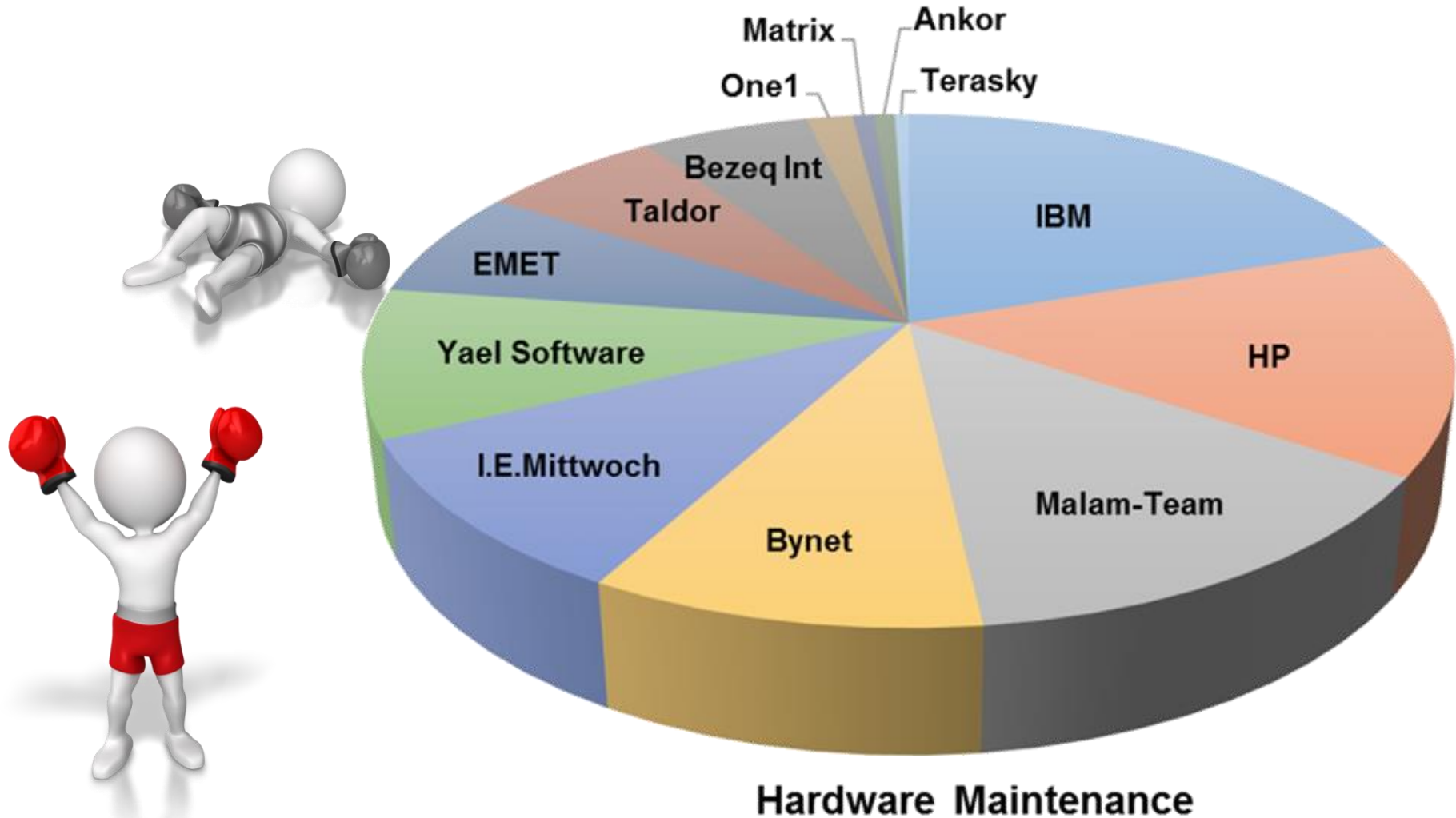
Israel 2011-15 Market : infrastructure project markets

	2011		2012		2013		2014		2015
Hardware Maintenance	150.0	-2.67%	146.0	-2.74%	142.0	-2.11%	139.0	-2.16%	136.0



	2011		2012		2013		2014		2015
software integration, middleware, soa projects	90.0	3.33%	93.0	9.68%	102.0	11.76%	114.0	7.02%	122.0
Consolidation/ virtualization /monitoring/ storage/ hardware / networking projects	200.0	5.00%	210.0	4.76%	220.0	4.55%	230.0	2.17%	235.0
	290.0	4.48%	303.0	6.27%	322.0	6.83%	344.0	3.78%	357.0

Market Players: Hardware Maintenance Services 2012

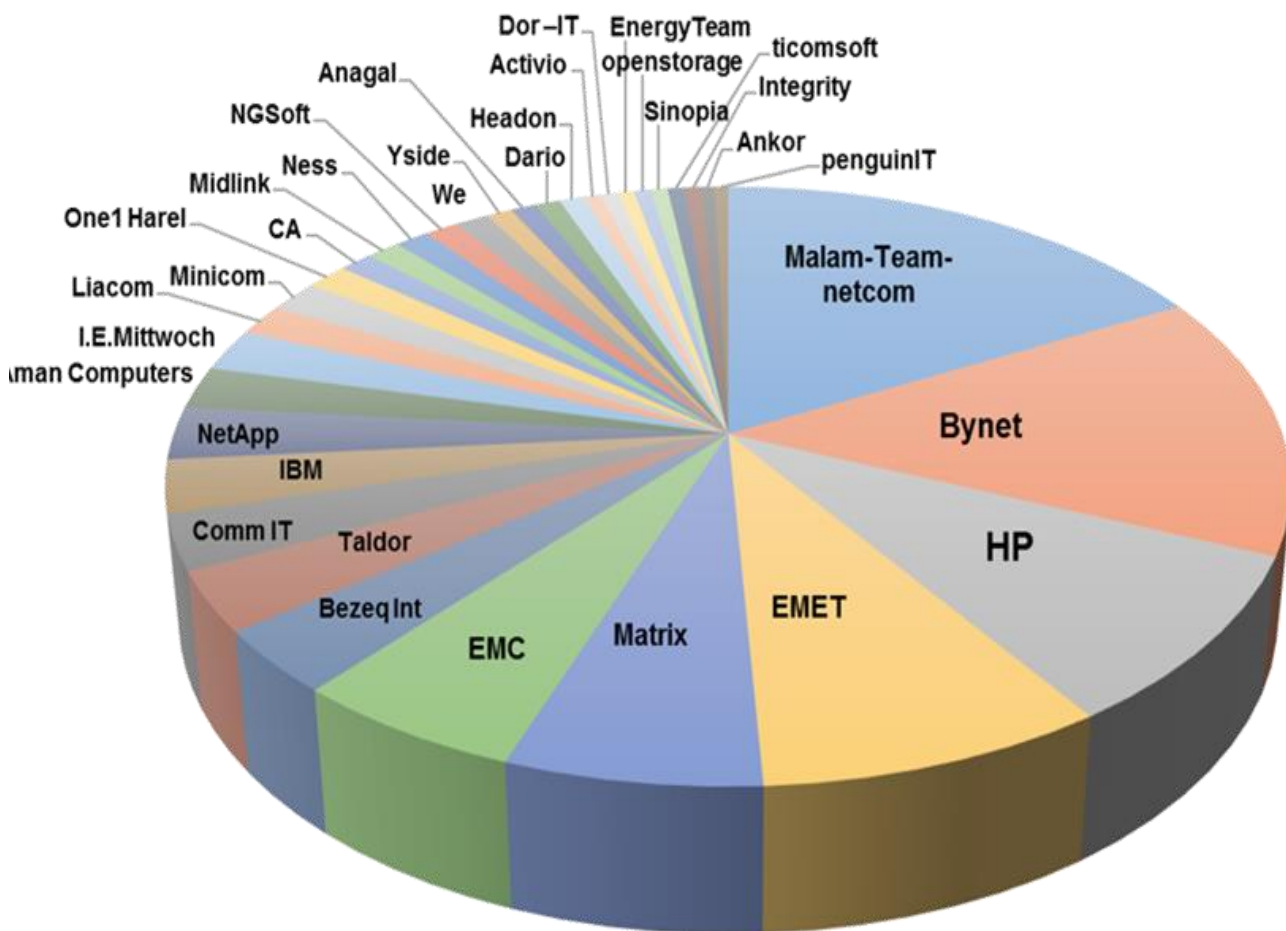


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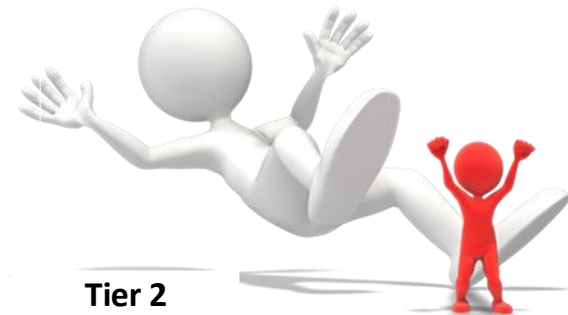
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Market Players: hardware infra. VAS projects 2012



Infrastructure Hardware Projects
(consolidation, virtualization, monitoring, stotage, networking, etc)



Tier 2

Yside
Anagal
Dario
Headon
Activio
Amdocs
Dor -IT
EnergyTeam
openstorage
Sinopia
ticomsoft
Integrity
penguinIT
techmind
doITwise

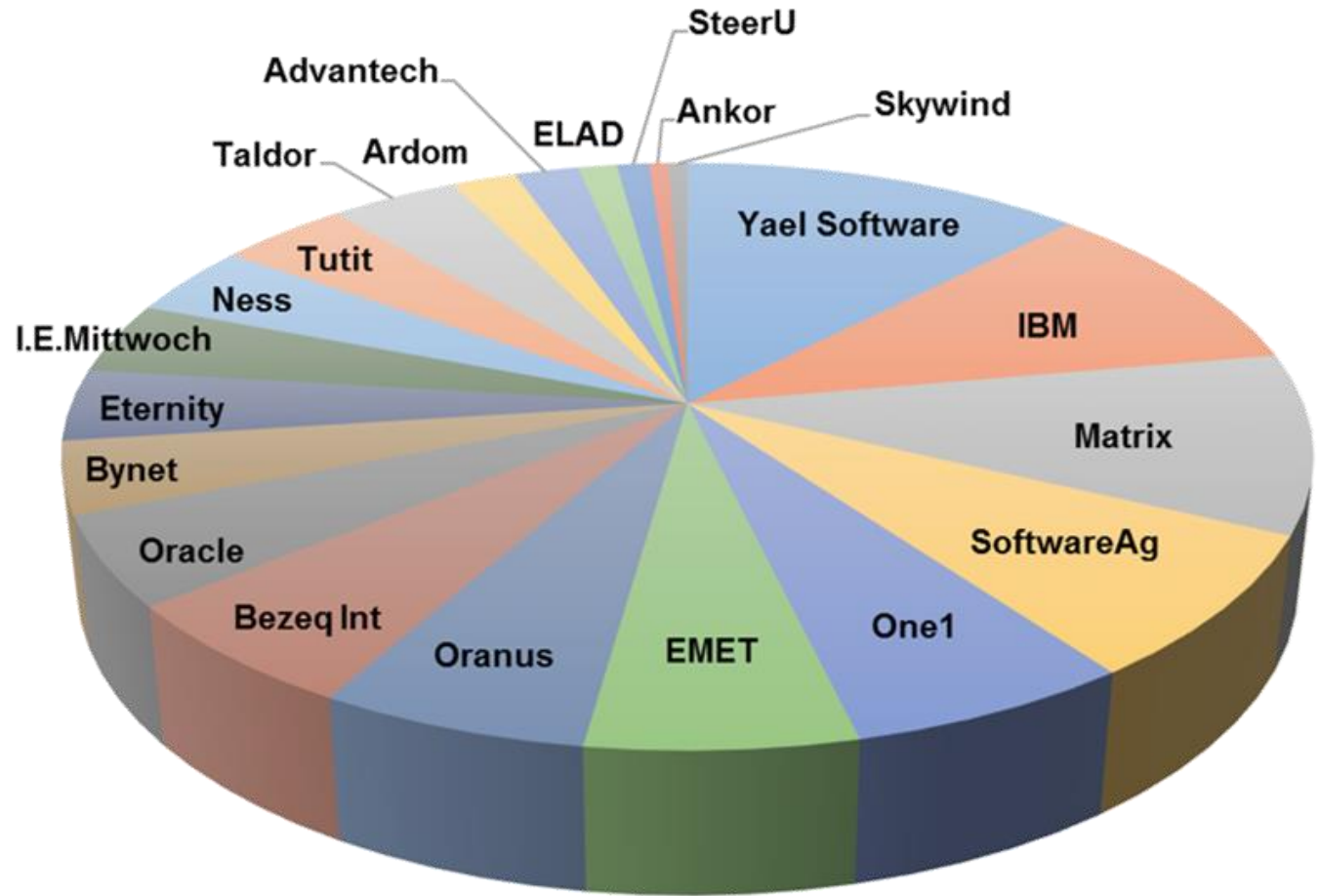
Tier 3

ELAD
Ardom
BenefIT
Dwash
elk-group
ITassist
ServiceNow
TrustIT
Terasky
Centerity
Blocal
venotion

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Market Players: software infra. VAS projects 2012



Software integration, middleware and SOA projects



We rank VENDORS by
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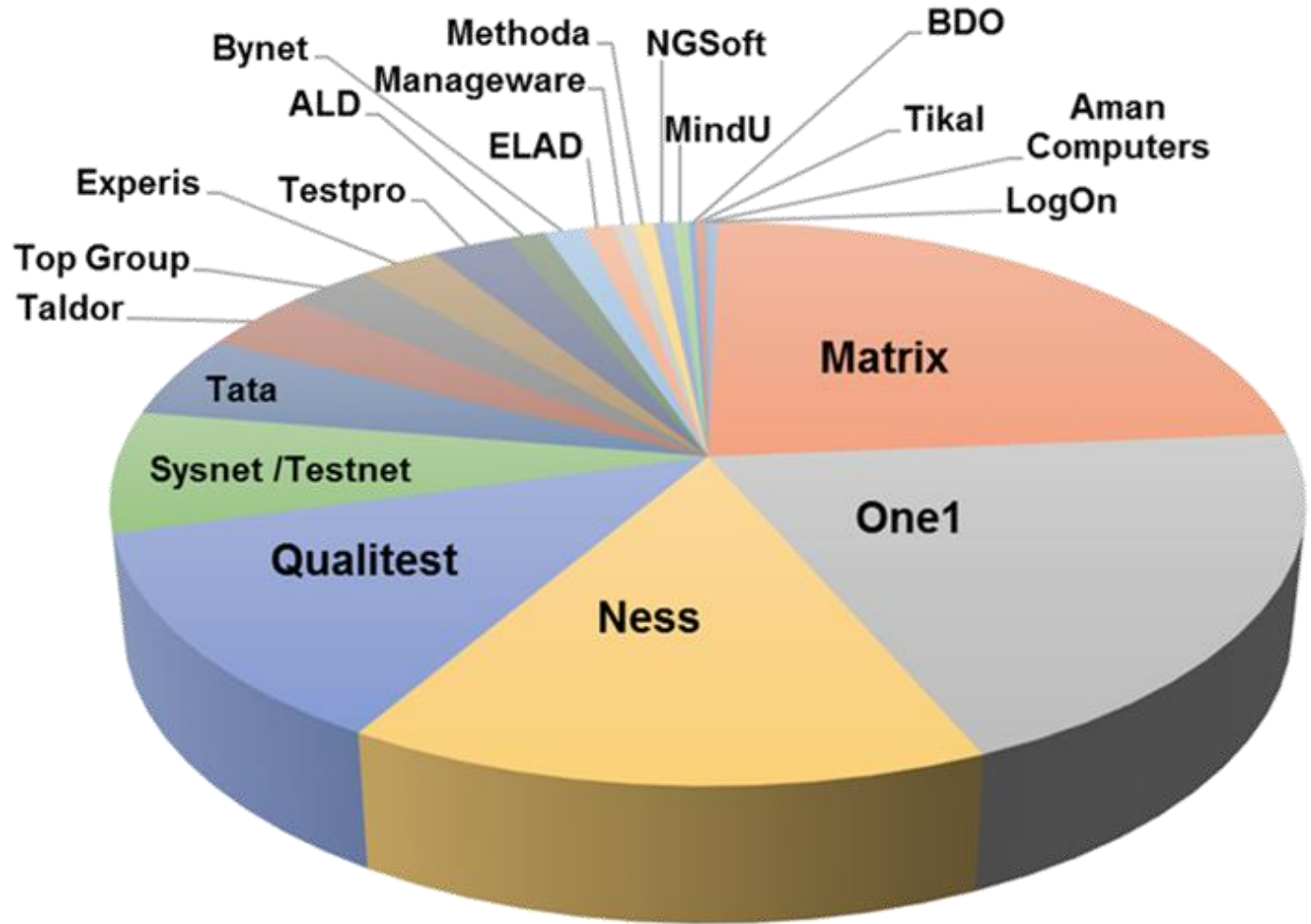
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Israel 2011-15 Market : Project Services market



	2011		2012		2013		2014		2015
ALM Q/A & Testing	142.0	5.63%	150.0	-32.00%	102.0	-3.92%	98.0	-1.02%	97.0
office of the CIO/ PMO	25.0	8.00%	27.0	11.11%	30.0	13.33%	34.0	14.71%	39.0
	167.0	5.99%	177.0	-25.42%	132.0	0.00%	132.0	3.03%	136.0

Market Players: ALM, Q/A & Testing Projects 2012



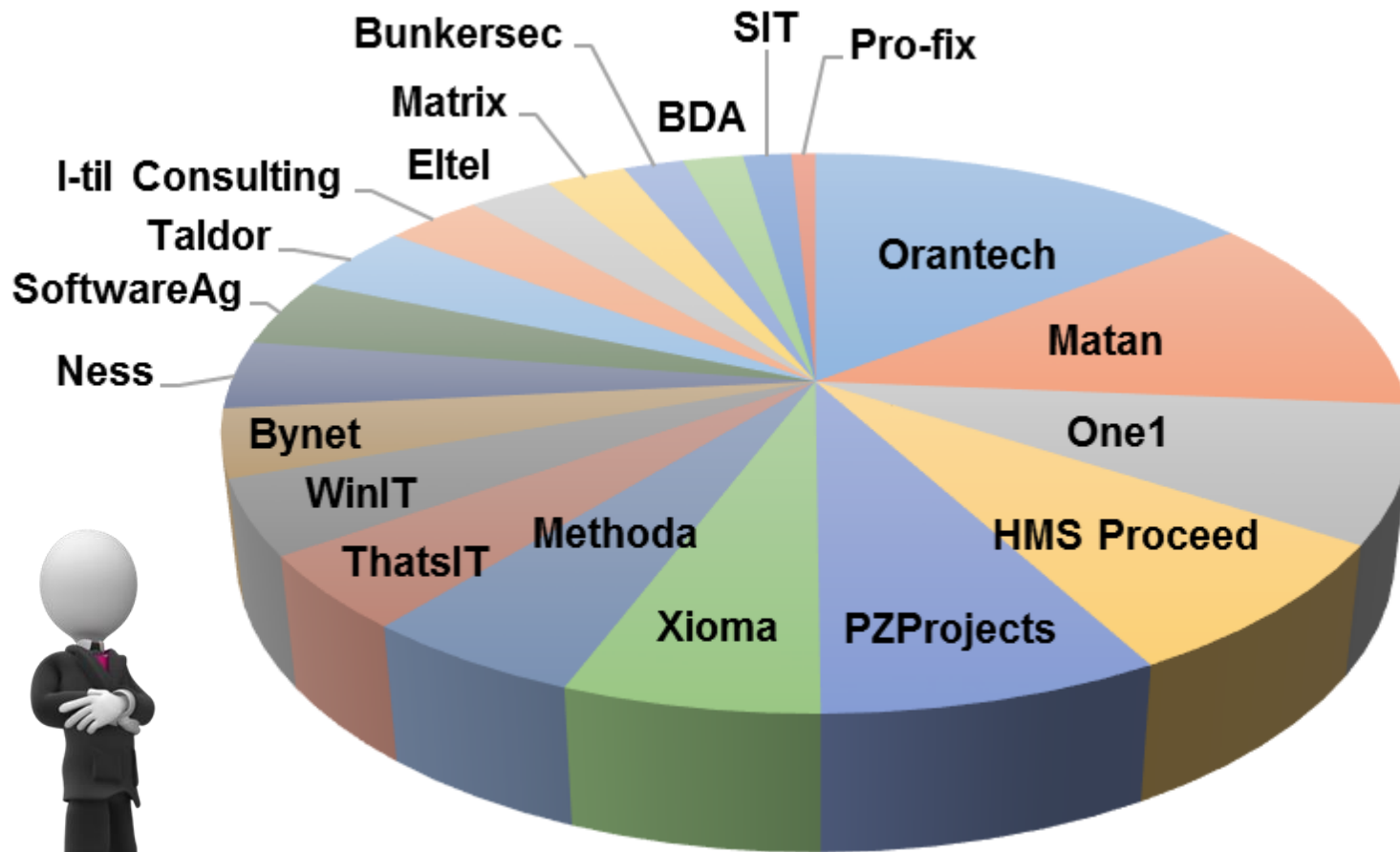
ALM, Q/A & testing projects

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Market Players: Office of the CIO Projects 2012



Office of the CIO / PMO projects

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Value Added Services Categories 2

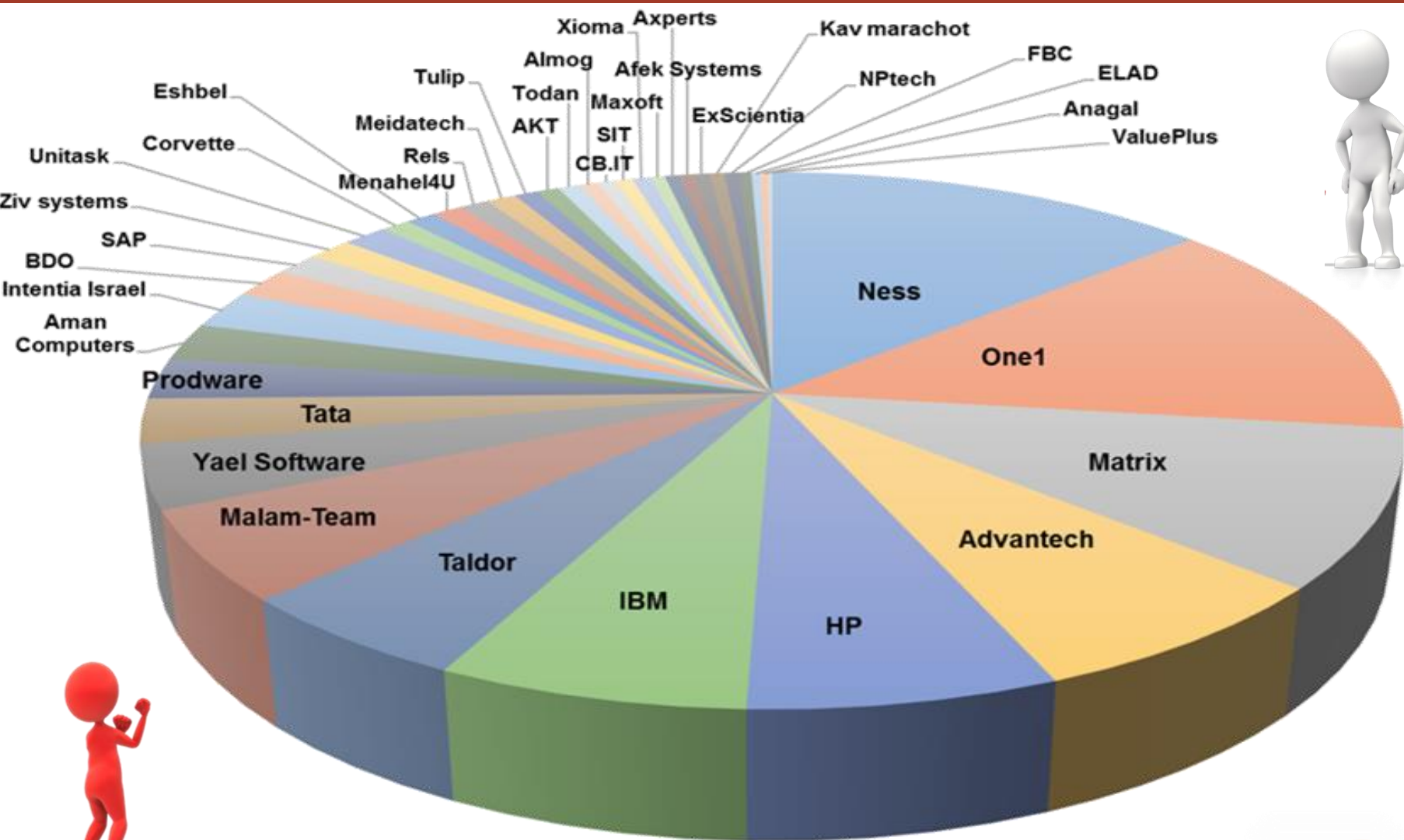
Development	ERP	ERP	שירותי פיתוח
	CRM	CRM	
	knowledge management (ECM, SP, BPM, Portals)	ניהול ידע (תוכן, SP, פורטלים, BPM)	
	.NET based without internet	דוט נט ללא אינטרנט ומובייל	
	java based without internet	Java ללא אינטרנט ומובייל	
	Web/internet	אתרי אינטרנט	
	Social and eBiz applications	מדיה חברתית/ ביזנס מקוון	
	Mobile, MDM	פיתוח מובייל וניהול מכשירי מובייל	
	User Interface Design	עיצוב ממשק משתמש	
	BI/DW/EPM/Data Management	מחסיני 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	ארכוב		
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	

Israel 2011-15 Market : application implementation market



	2011		2012		2013		2014		2015
ERP	230.0	-8.70%	210.0	-2.38%	205.0	1.46%	208.0	1.92%	212.0
CRM	130.0	11.54%	145.0	10.34%	160.0	5.00%	168.0	4.76%	176.0
core/vertical	130.0	-3.85%	125.0	-12.00%	110.0	-9.09%	100.0	30.00%	130.0
BI/DW/EPM/Data Management	145.0	7.59%	156.0	8.97%	170.0	5.88%	180.0	6.67%	192.0
KM,ECM,SP,BPM,others	89.0	3.37%	92.0	6.52%	98.0	6.12%	104.0	5.77%	110.0
totals	724.0	0.55%	728.0	2.06%	743.0	2.29%	760.0	7.89%	820.0

Market Players: ERP Projects 2012



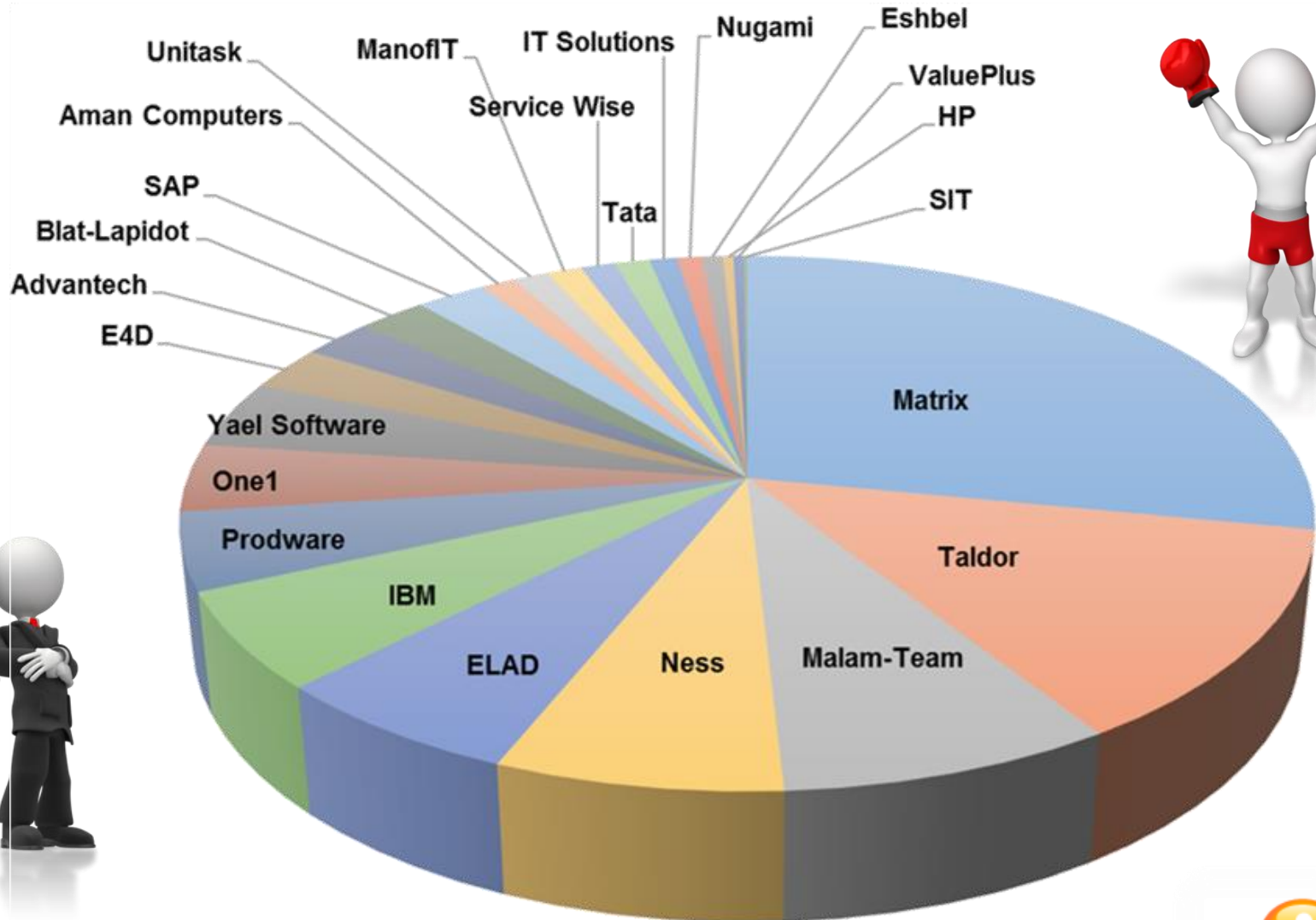
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Enterprise ERP projects

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Market Players: CRM Projects 2012



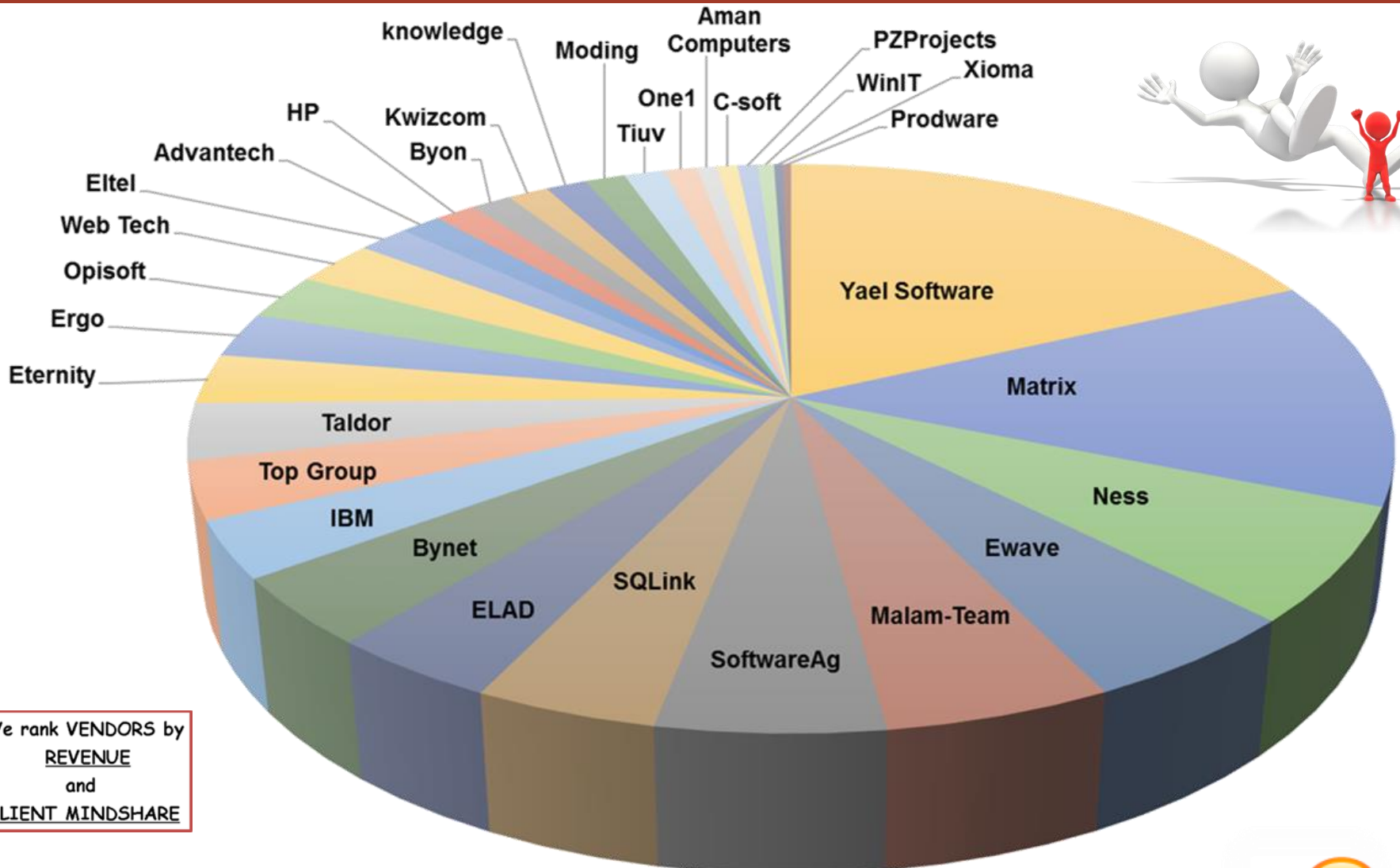
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CRM Projects

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Market Players: KM Projects 2012



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and
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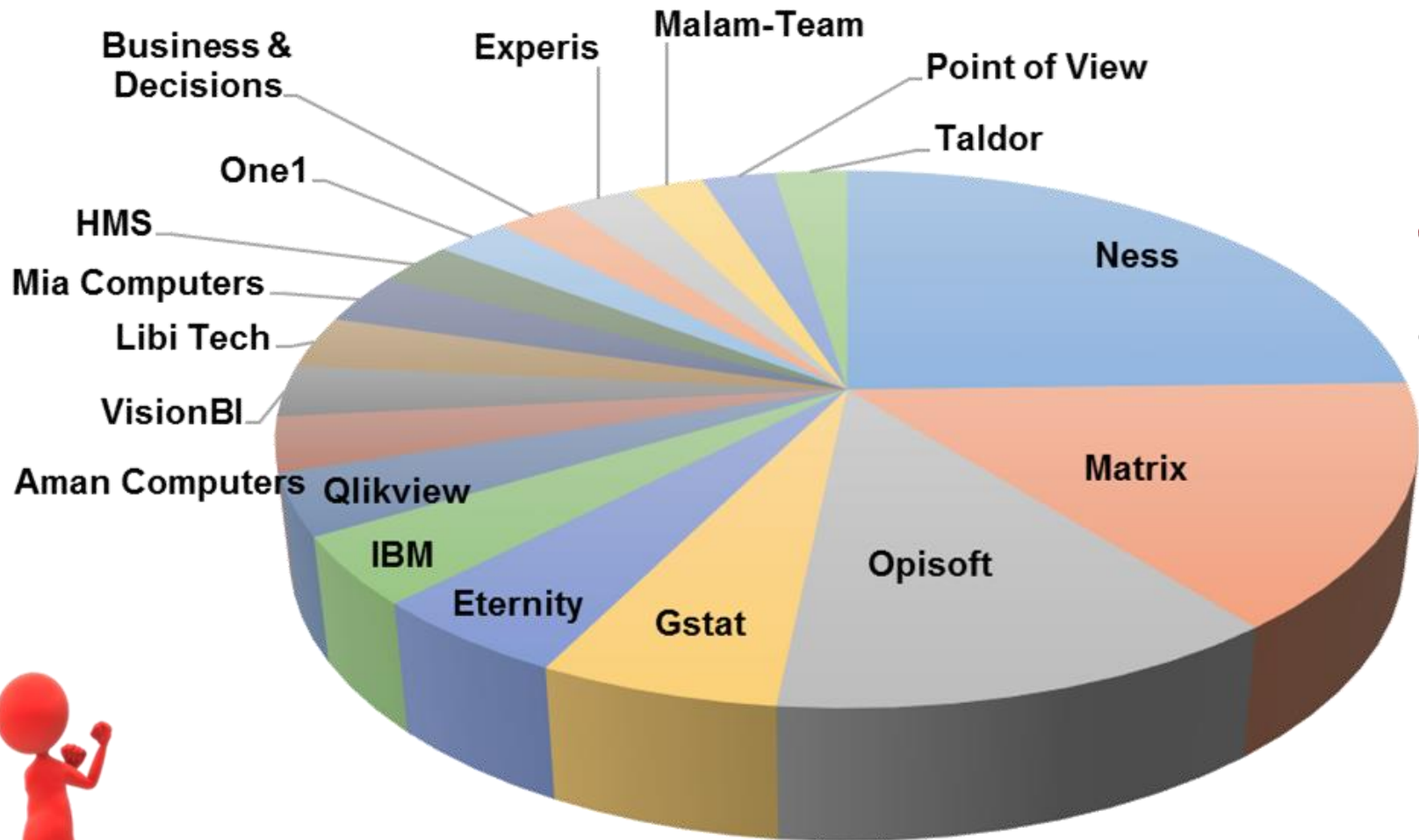
Knowledge Management (ECM, SP, BPM, Portals, etc) Projects

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Market Players: Data Analysis Projects 2012



Analytics, BI, EPM and other data analysis projects

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Israel 2011-15 Market : Software Development Market



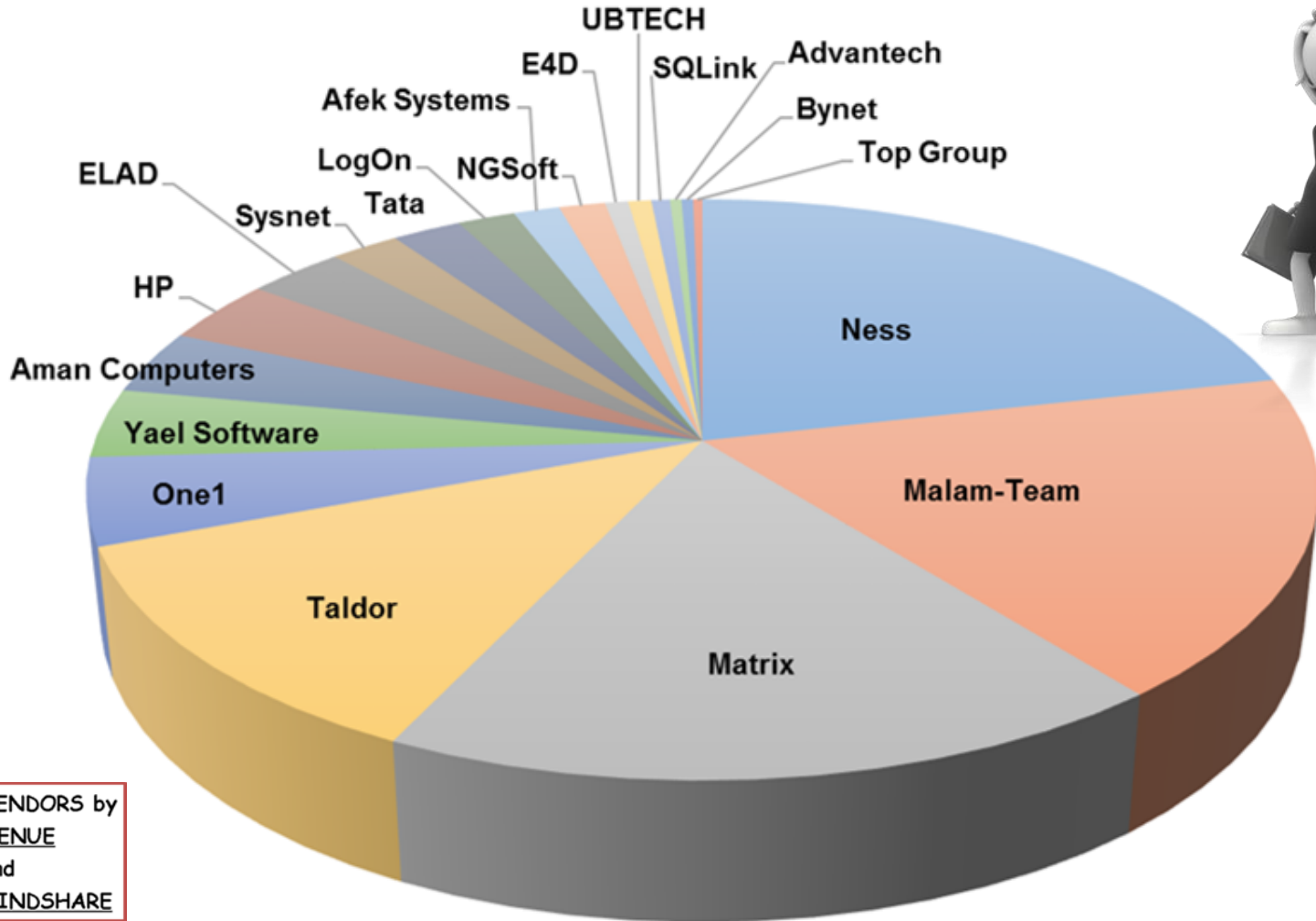
	2011		2012		2013		2014		2015
.NET (XRM) based without internet	91.0	17.58%	107.0	21.50%	130.0	11.54%	145.0	9.66%	159.0
Web/internet/social	65.0	12.31%	73.0	6.85%	78.0	5.13%	82.0	10.98%	91.0
Java based without internet	30.0	3.33%	31.0	3.23%	32.0	18.75%	38.0	18.42%	45.0
Legacies/mainframe	47.0	-14.89%	40.0	-5.00%	38.0	-15.79%	32.0	-12.50%	28.0
Migrations/ others	25.0	8.00%	27.0	-7.41%	25.0	8.00%	27.0	7.41%	29.0
Mobile/MDM	25.0	24.00%	31.0	61.29%	50.0	24.00%	62.0	12.90%	70.0
User Interface Design	18.0	11.11%	20.0	75.00%	35.0	8.57%	38.0	18.42%	45.0
output mgmt/print mgmt	20.0	5.00%	21.0	19.05%	25.0	8.00%	27.0	11.11%	30.0
totals	321.0	9.03%	350.0	18.00%	413.0	9.20%	451.0	10.20%	497.0

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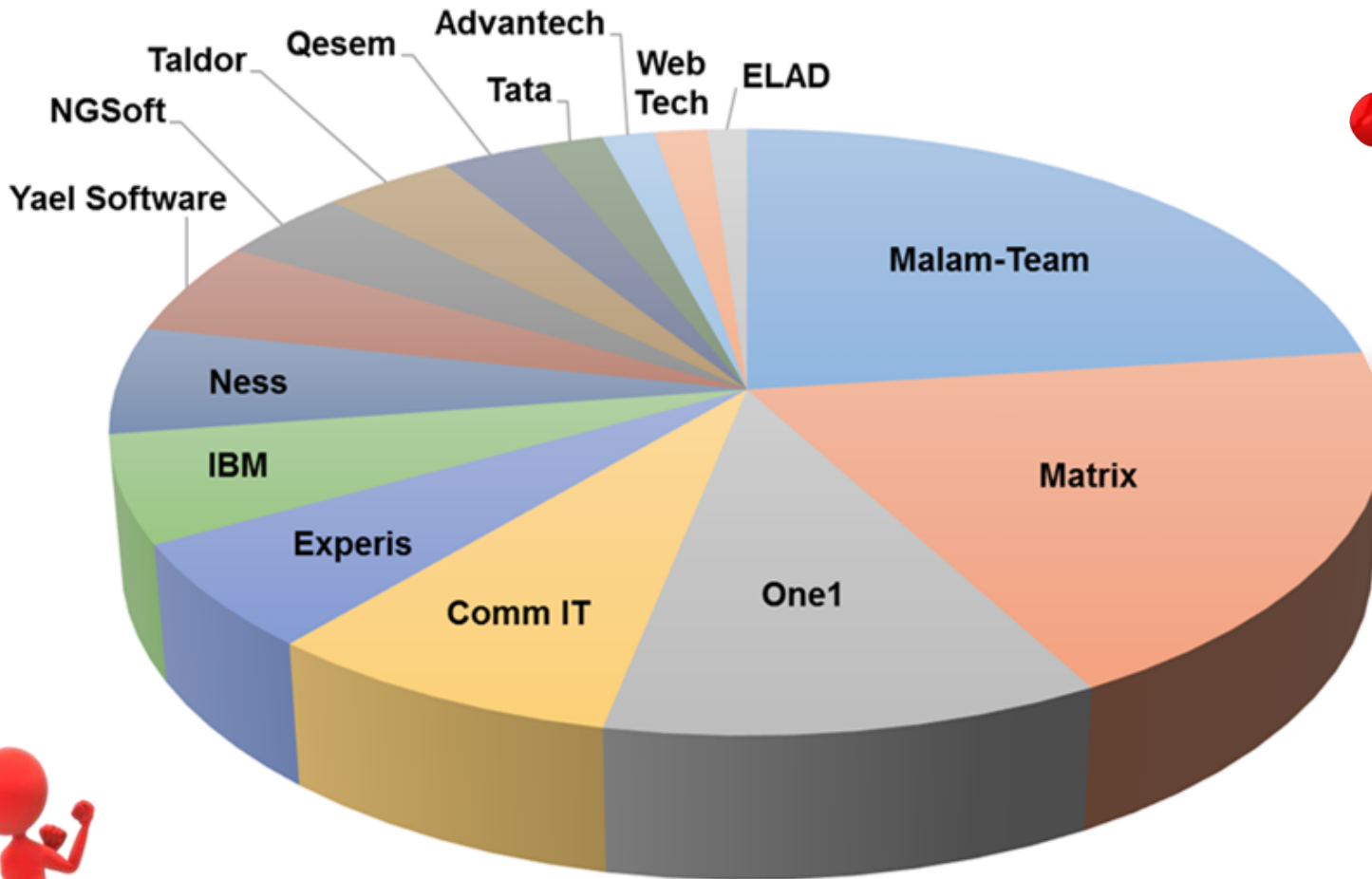


Market Players: .NET Projects 2012



Projects (not internet) based on .NET technologies

Market Players: JAVA Projects 2012



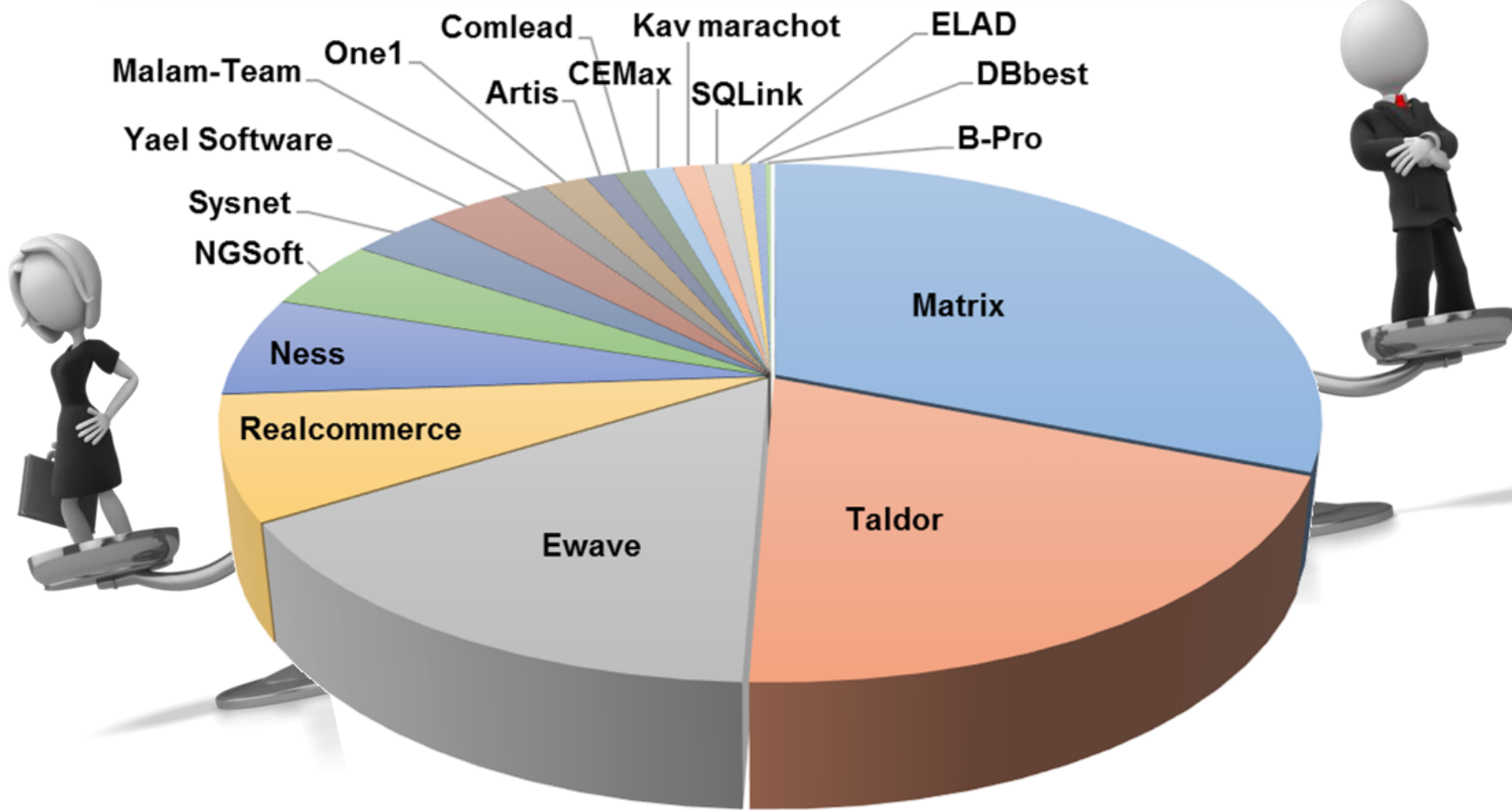
Projects (not internet) based on JAVA technologies

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Market Players: Web/social Projects 2012



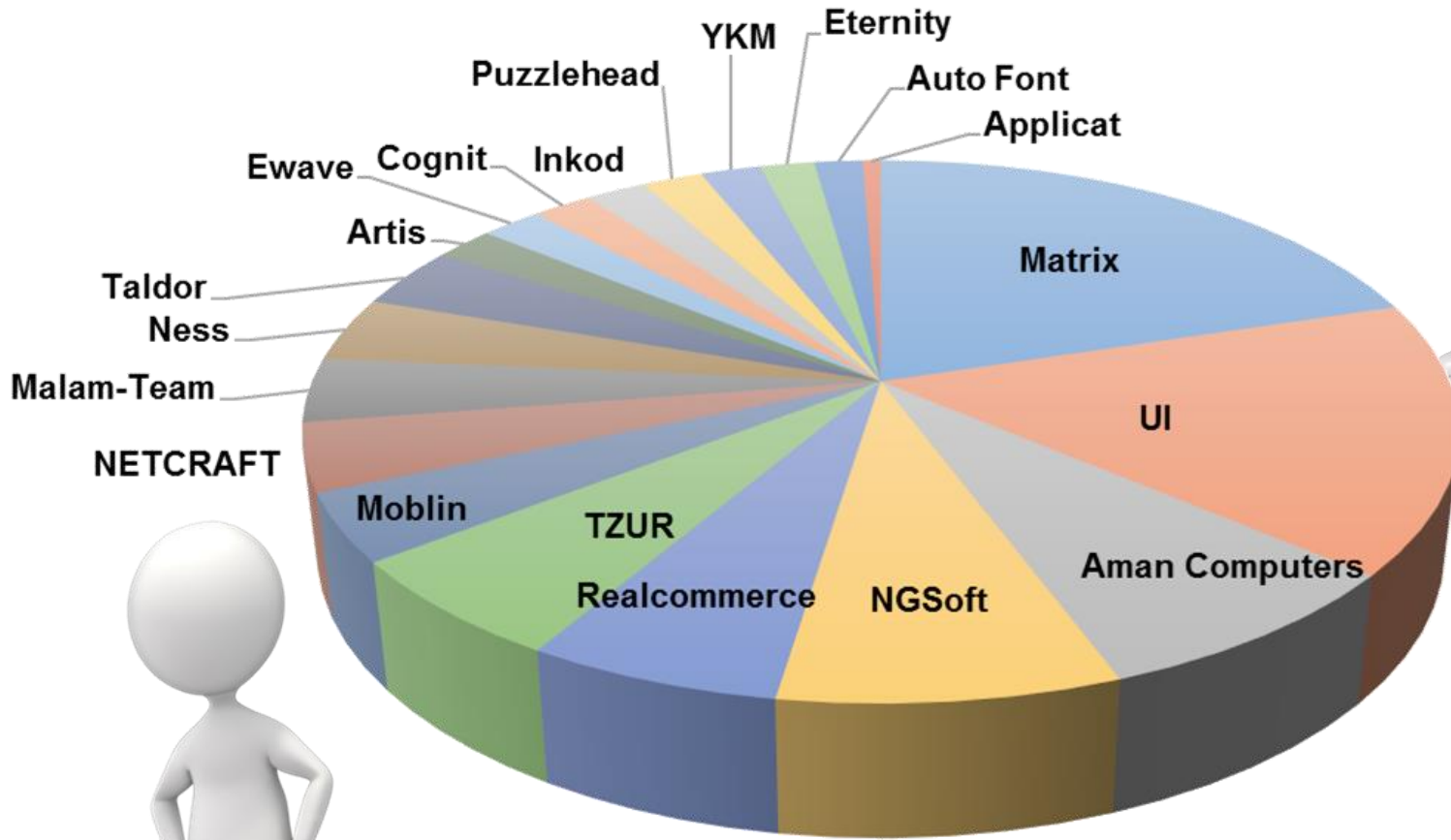
web, internet and social projects



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Market Players: UI/MMI projects 2012



UI/MMI Interface Projects

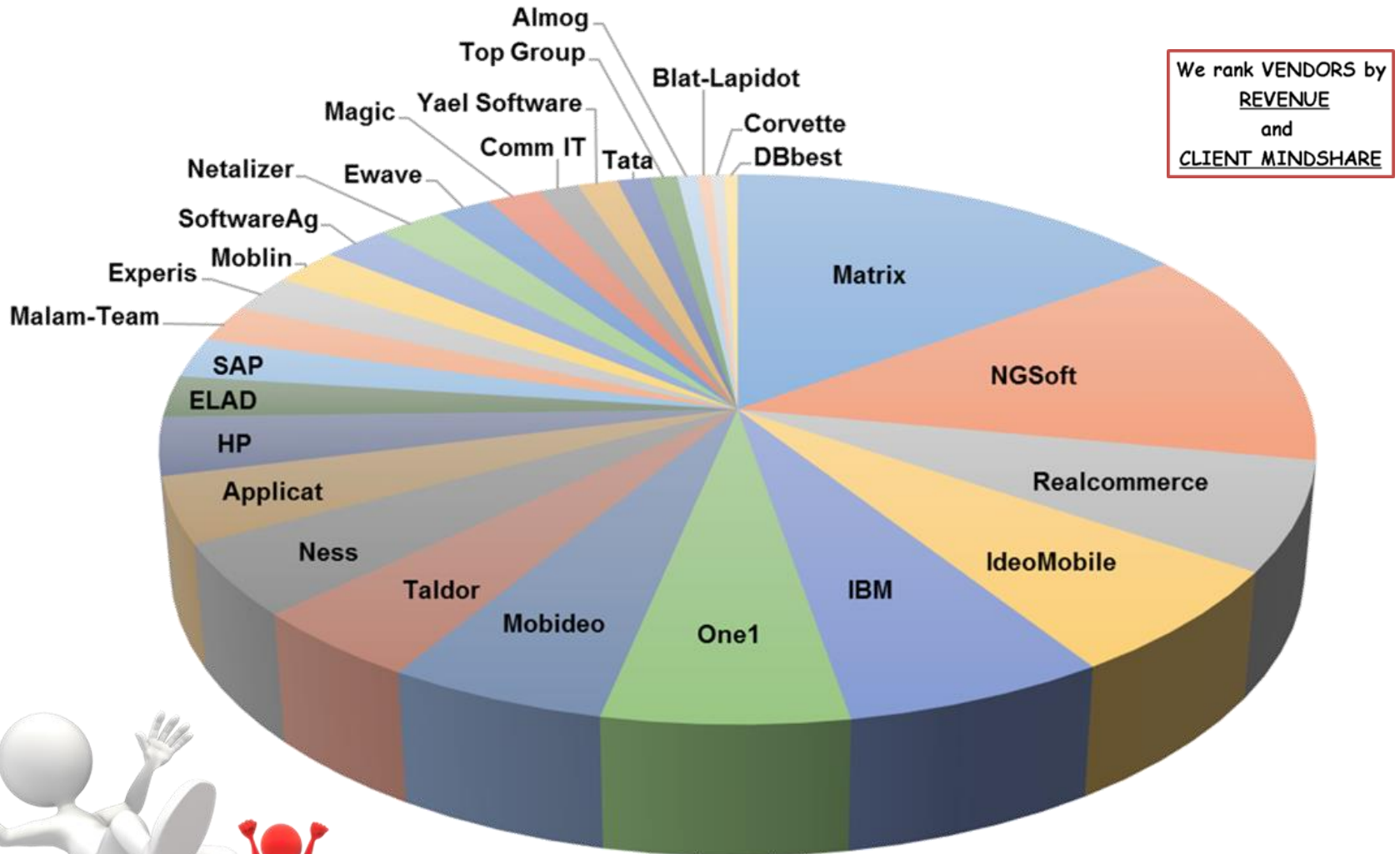


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Market Players: Mobility Projects 2012



Mobility/Mobile Development Projects

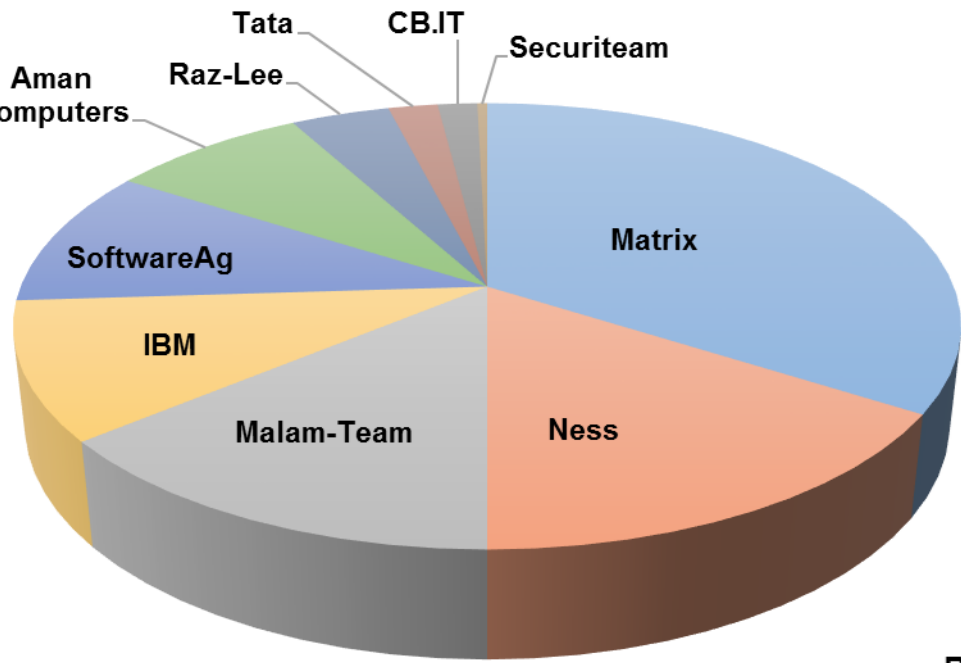


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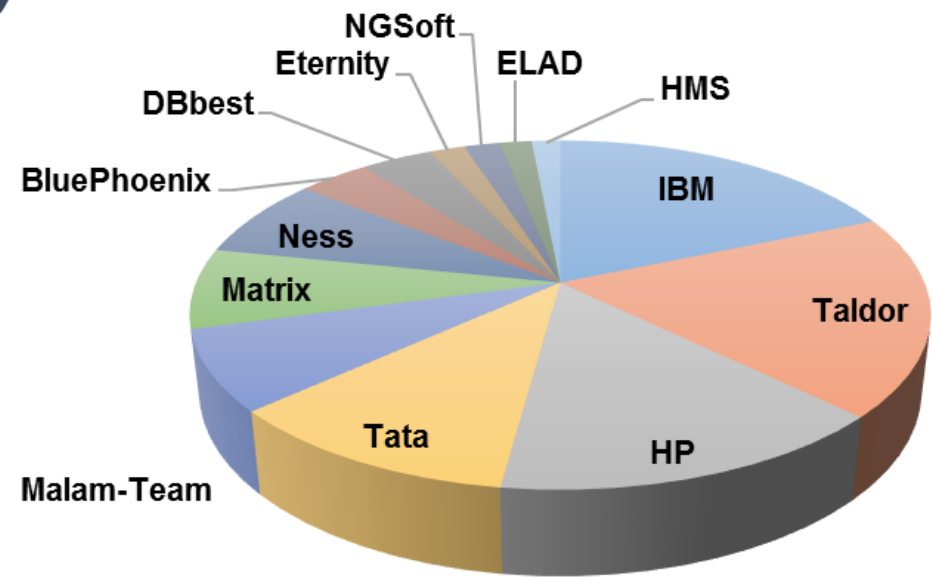
Market Players: Legacy & Migration Projects 2012



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Legacy (MF, AS/400, other) Projects



"migration" software projects



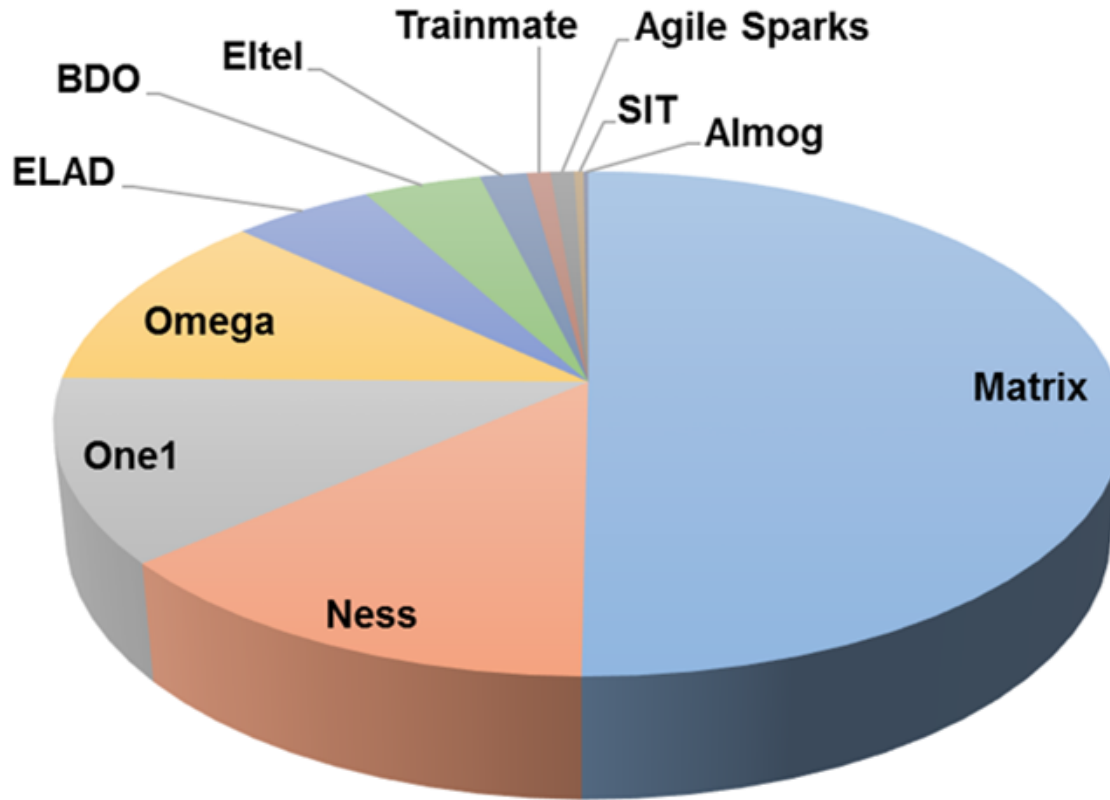
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Israel 2011-15 Market : Training & Archiving market



	2011		2012		2013		2014		2015
training	105.0	2.86%	108.0	-5.56%	102.0	-6.86%	95.0	-3.16%	92.0
Archiving	50.0	4.00%	52.0	0.00%	52.0	7.69%	56.0	0.00%	56.0
totals	155.0	3.23%	160.0	-3.75%	154.0	-1.95%	151.0	-1.99%	148.0

Market Players: Training 2012



Computer Technology Training (courses)



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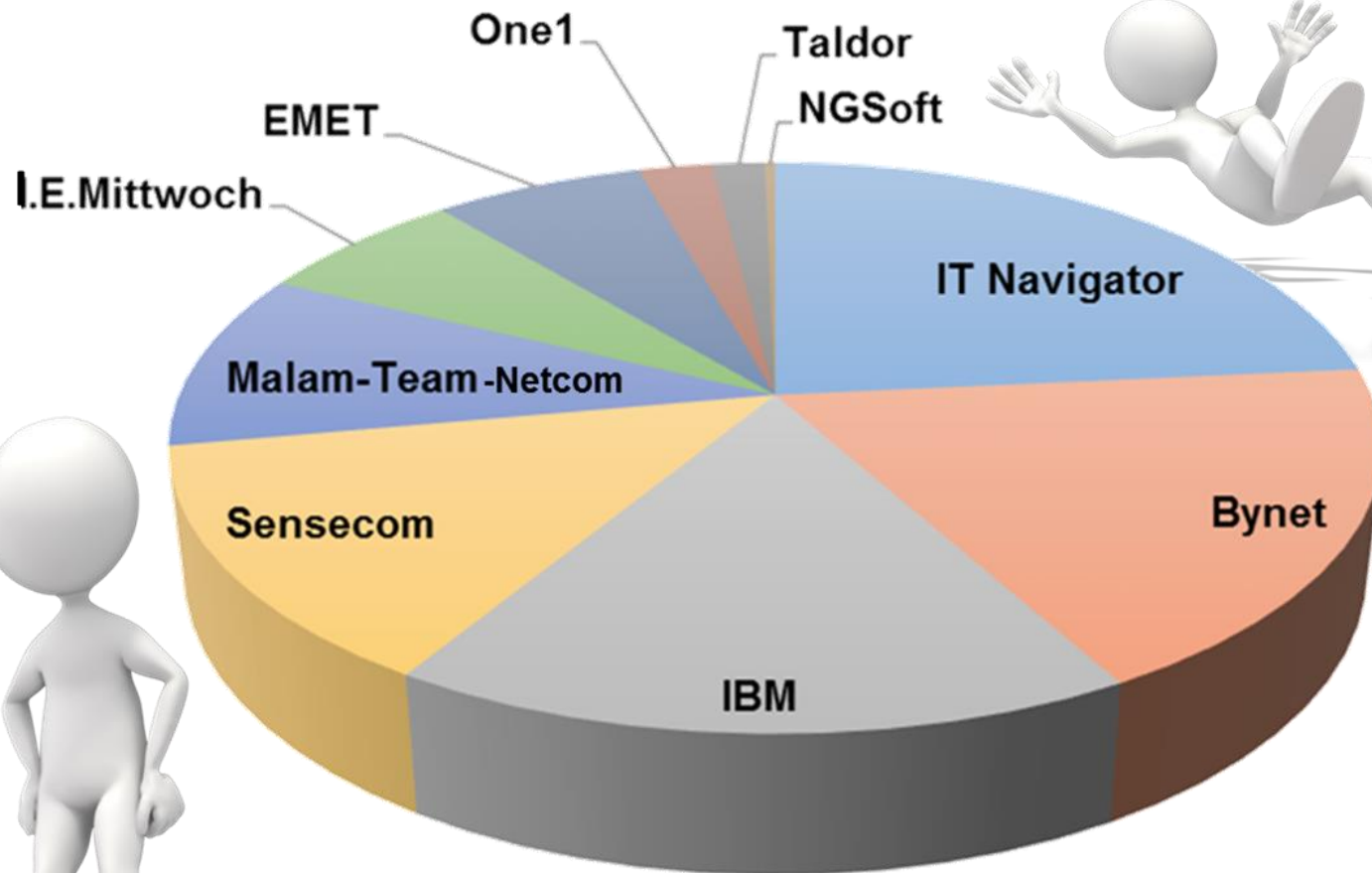


Israel 2011-15 Market : VoIP Projects market



	2011		2012		2013		2014		2015
VoIP/call centers	50.0	2.00%	51.0	7.84%	55.0	3.64%	57.0	3.51%	59.0
VoIP/telephony	32.0	9.38%	35.0	0.00%	35.0	5.71%	37.0	0.00%	37.0
totals	82.0	4.88%	86.0	4.65%	90.0	4.44%	94.0	2.13%	96.0

Market Players: VoIP/Call Center Projects 2012



VoIP (call center) projects

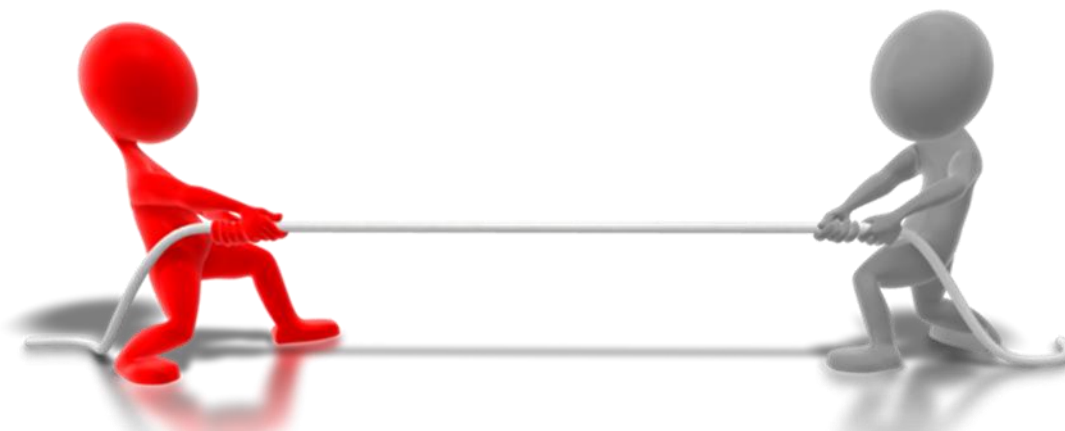
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Value Added Services Categories 3

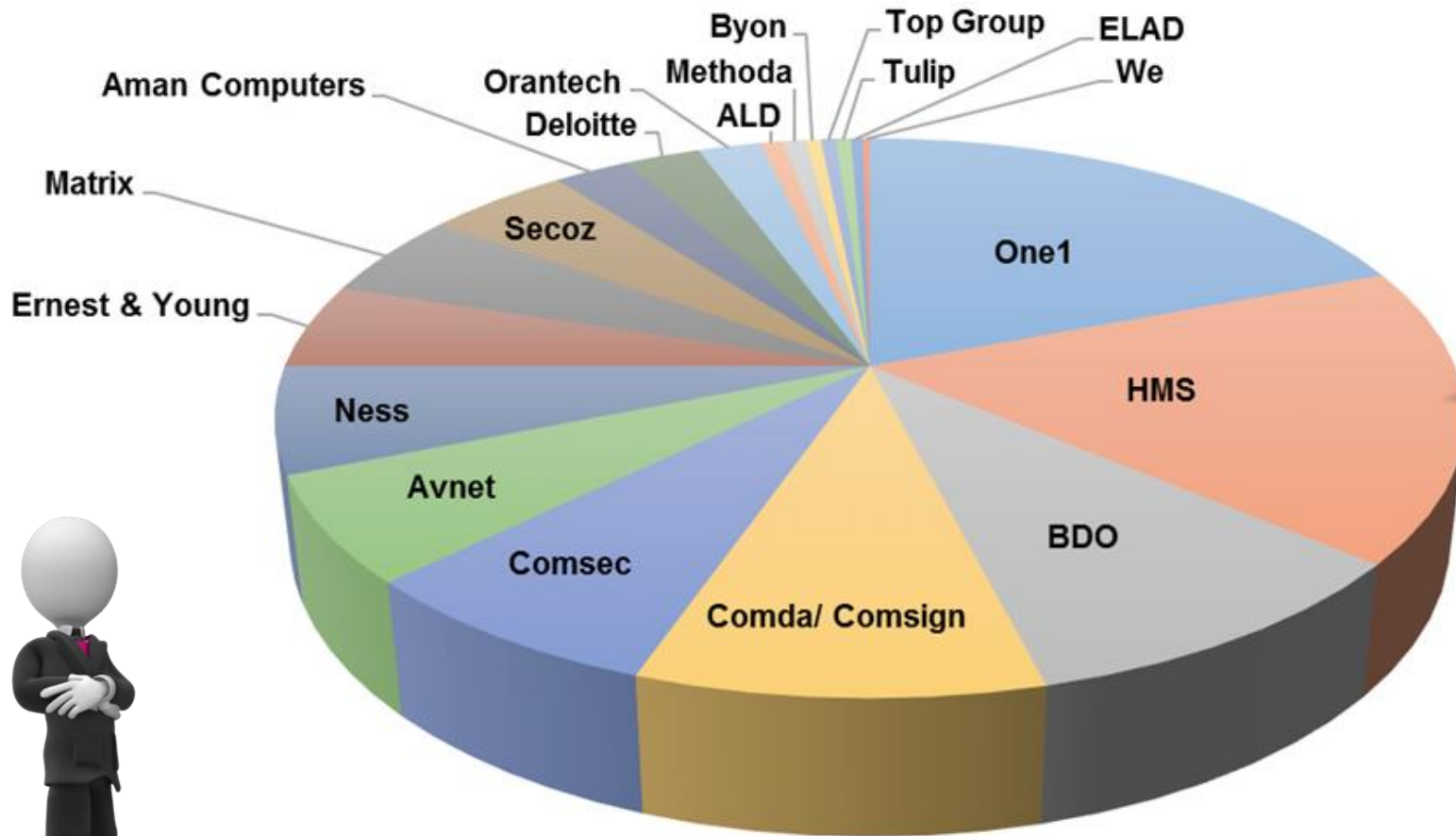
Governance & Risk Management	auditing	ביקורות/רגולציה	ניהול סיכונים, רגולציות
	Governance & Risk Management	ניהול סיכונים	
	risk assessment/ penetration tests	הערכת סיכונים ומבדקי חדירה	
	security projects	אבטחת מידע	
	other	אחר	
OUTSOURCING SERVICES	"off site" data center/hosting (finger only services)	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	call centers \ שירותי תמיכה בלקוחות	
	Complete outsourcing	מיקור חוץ מלא	
	application outsourcing	מיקור חוץ אפליקטיבי	
	other	אחר	
	Infrastructure Outsourcing	managed infrastructure services	מיקור חוץ כולל לתשתיות
storage management		לתחום האחסון	
DBA services		לשירותי DBA	
security services		לשירותי אבטחת מידע	
other		אחר	

Israel 2011-15 Market : Security, Cyber & GRC Projects market



	2011		2012		2013		2014		2015
Auditing , Governance & Risk Management	65.0	9.23%	71.0	5.63%	75.0	2.67%	77.0	2.60%	79.0
security projects (risk assessment/ penetration tests MDM)	120.0	4.17%	125.0	12.00%	140.0	12.86%	158.0	7.59%	170.0
	185.0	5.95%	196.0	9.69%	215.0	9.30%	235.0	5.96%	249.0

Market Players: Risk & GRC Projects 2012



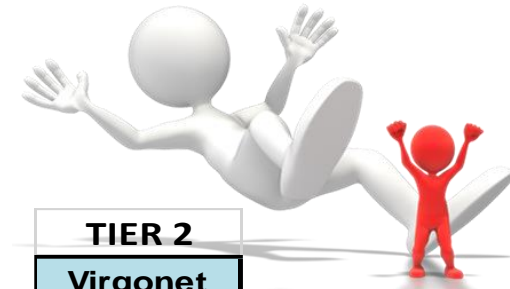
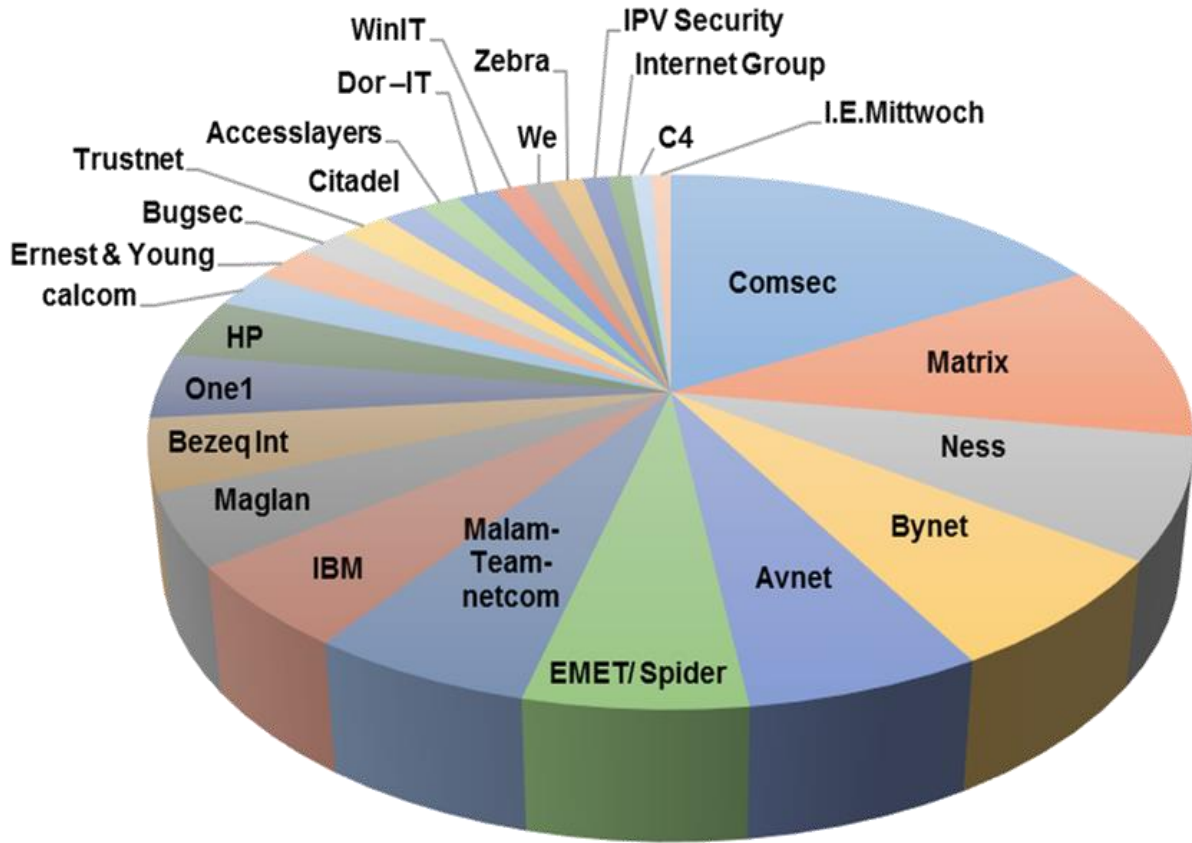
Auditing, governance & risk management projects



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Market Players: Security Projects 2012



TIER 2
Virgonet
Integrails
Secoz
LogOn
Taldor
Oranus
BDO
Brillix
Checkmarx
Deloitte
Prolink
HMS
Methoda
ELAD

Security Projects
(risk assesment, penetration tests, forensics, MDM,etc)



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

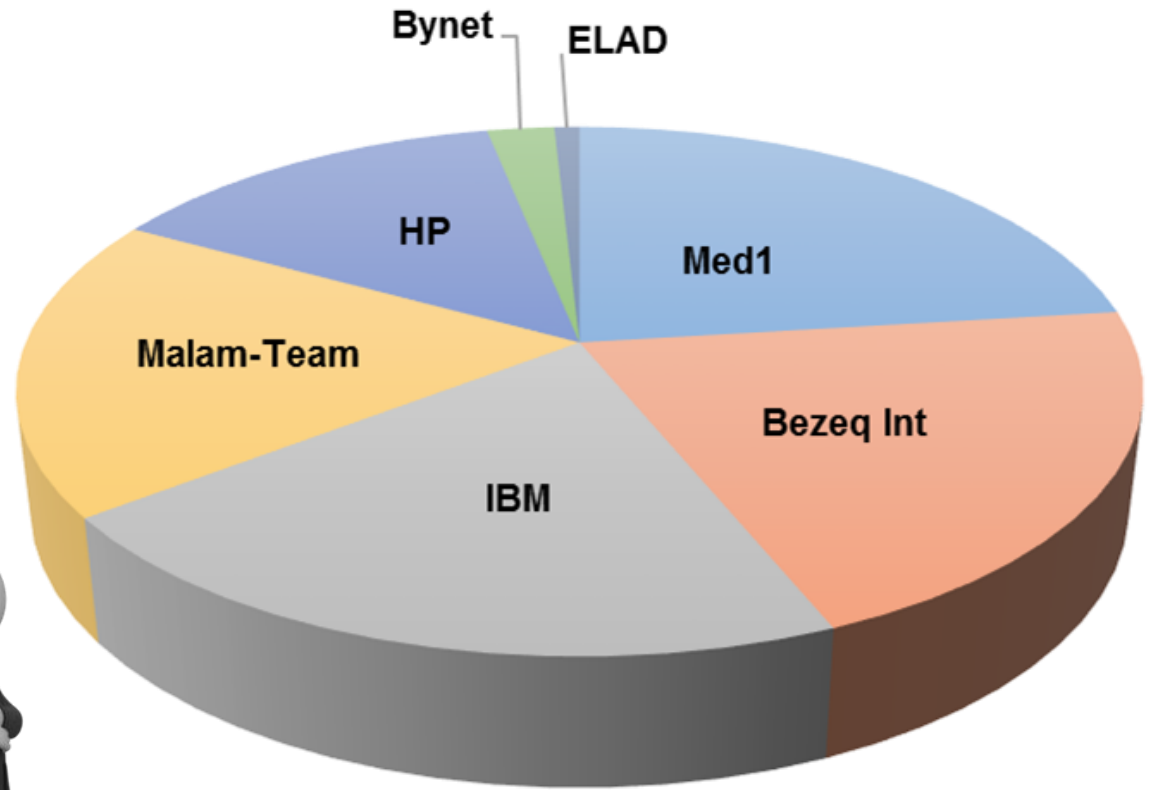


Israel 2011-15 Market : Outsourcing markets



		2011		2012		2013		2014		2015
"off site" data center -		40.0	12.50%	45.0	8.89%	49.0	22.45%	60.0	8.33%	65.0
call centers/help desk		60.0	3.33%	62.0	0.00%	62.0	9.68%	68.0	0.00%	68.0
application/ complete outsourcing		230.0	-6.52%	215.0	-11.63%	190.0	-10.53%	170.0	-2.94%	165.0
infrastructure outsourcing	managed infrastructure	87.0	0.00%	87.0	3.45%	90.0	3.33%	93.0	2.15%	95.0
	security	18.0	16.67%	21.0	52.38%	32.0	12.50%	36.0	11.11%	40.0
	printing/copying/ faxing	32.0	6.25%	34.0	5.88%	36.0	11.11%	40.0	5.00%	42.0
totals		2,733.0	0.33%	2,742.0	-83.26%	459.0	1.74%	467.0	1.71%	475.0

Market Players: off-site DC services 2012



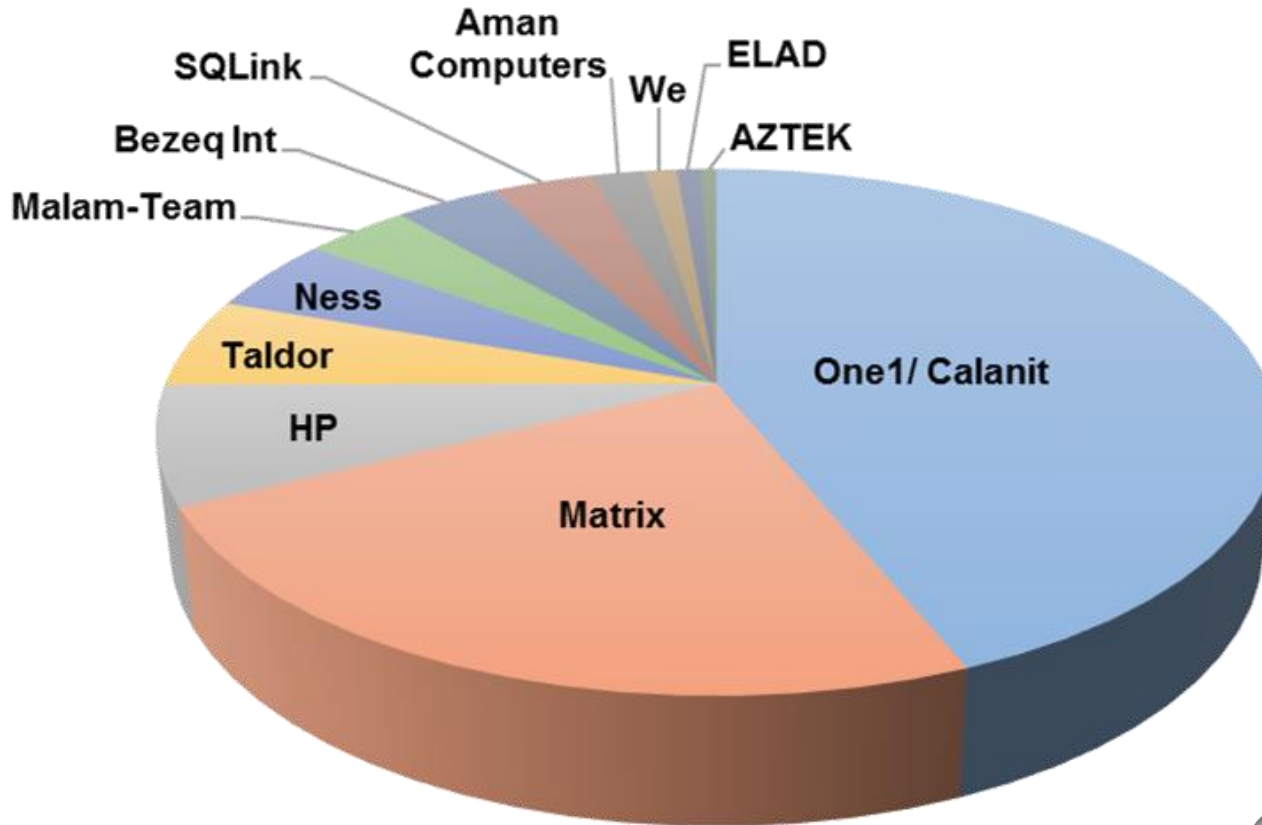
"off-site" data center (operational or DRP)



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



Market Players: call center/help desk outsourcing 2012



Outsourcing: call centers/ help desk

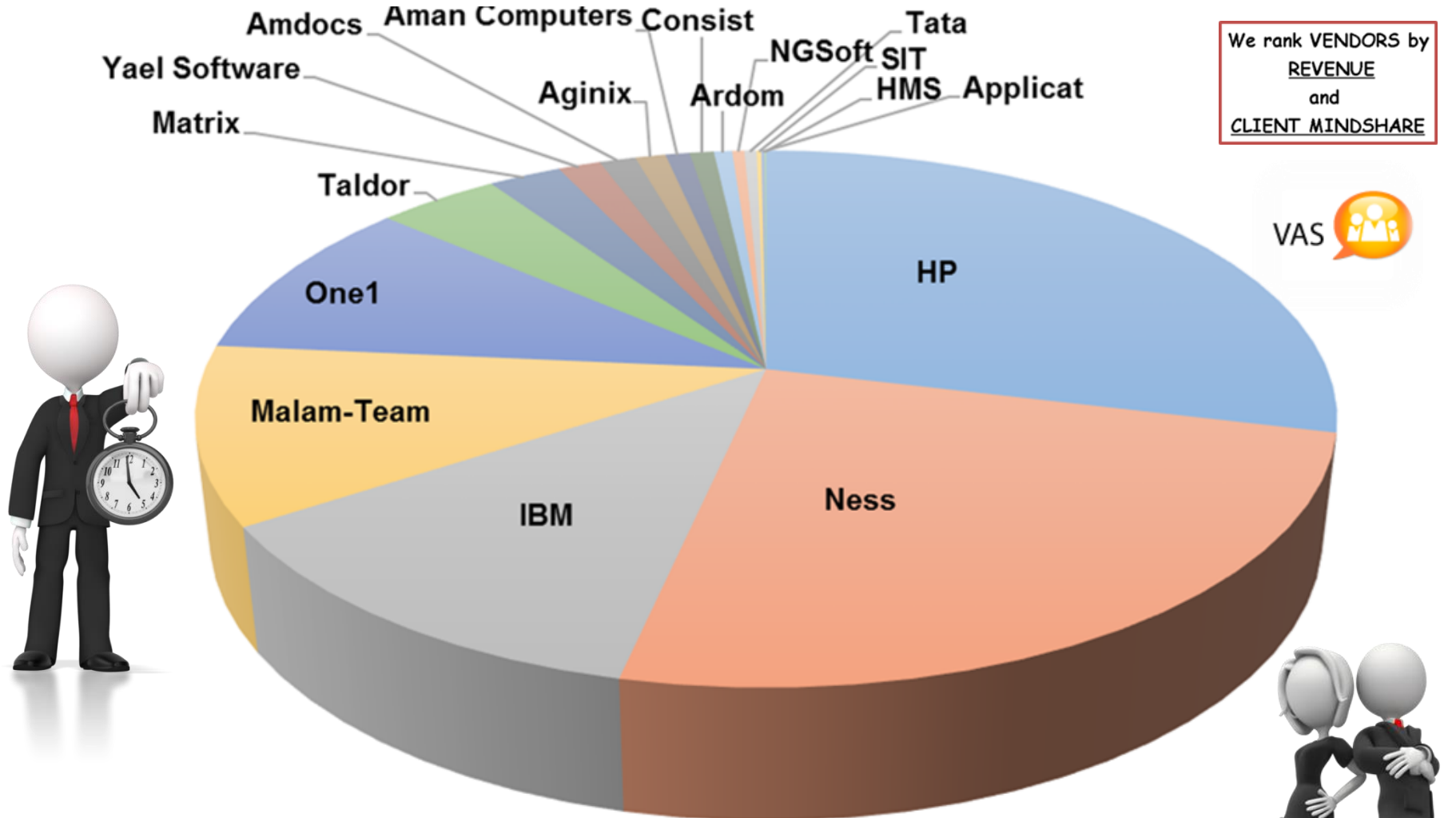


We rank VENDORS by
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and
CLIENT MINDSHARE

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Market Players: outsourcing 2012

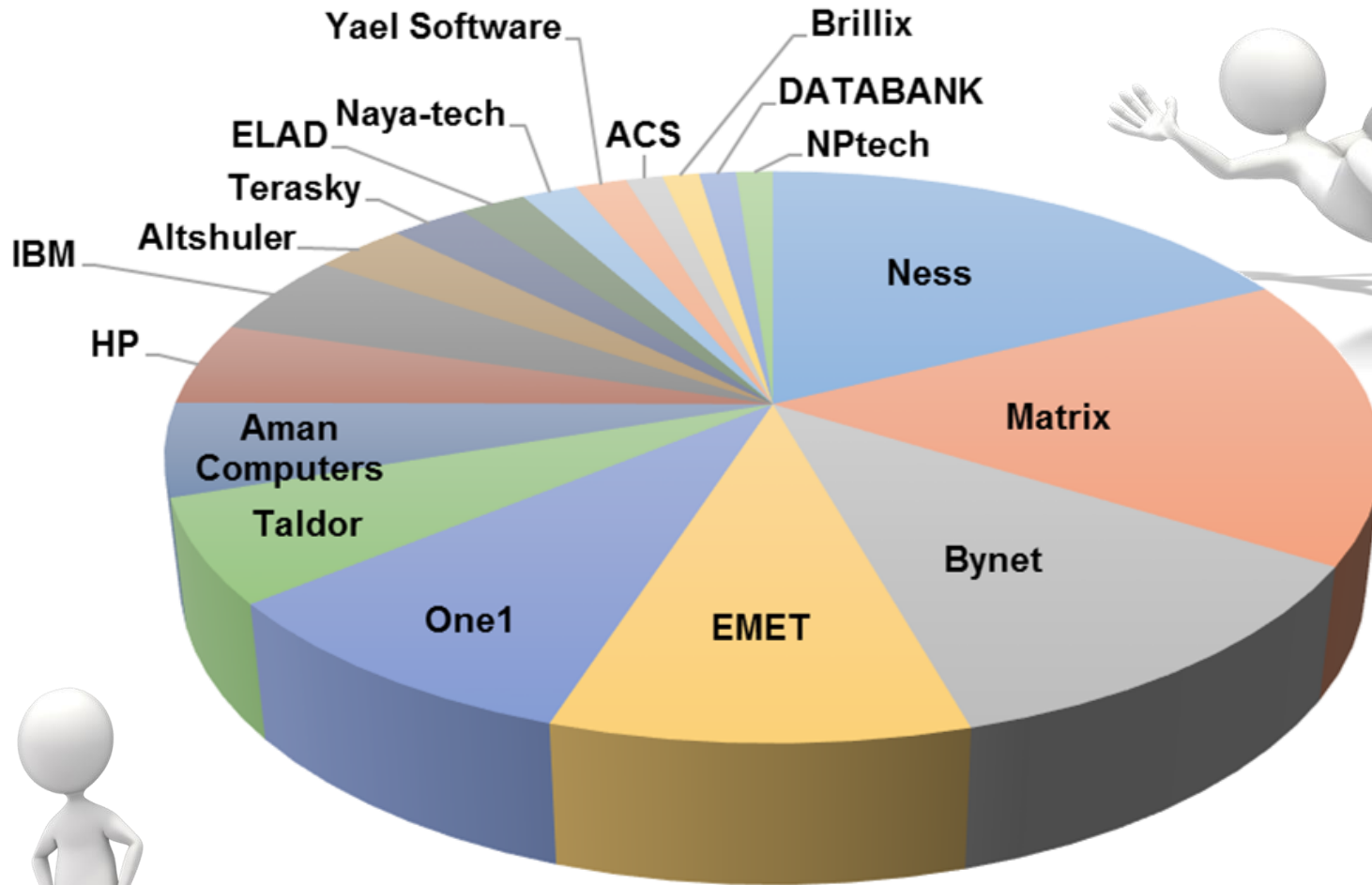
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and
CLIENT MINDSHARE



application/ complete outsourcing services

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Market Players: Managed Infra. Services 2012

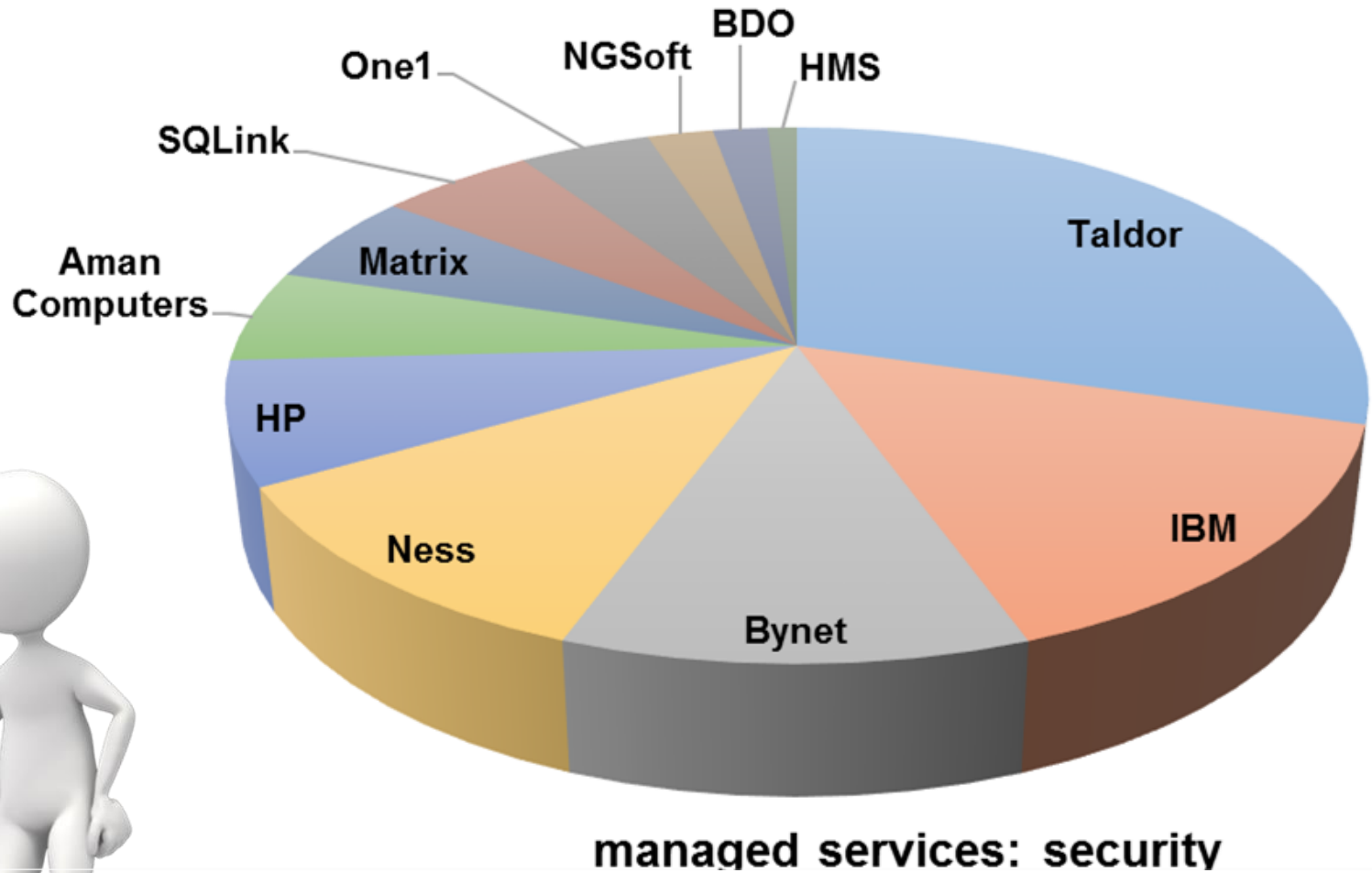


managed infrastructure services (storage, DBA, etc)

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



Market Players: security services 2012



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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	נוח אדם/קבלנים
	Nearshore	נרשור	

Israel 2011-15 Market : “Cloud” services market

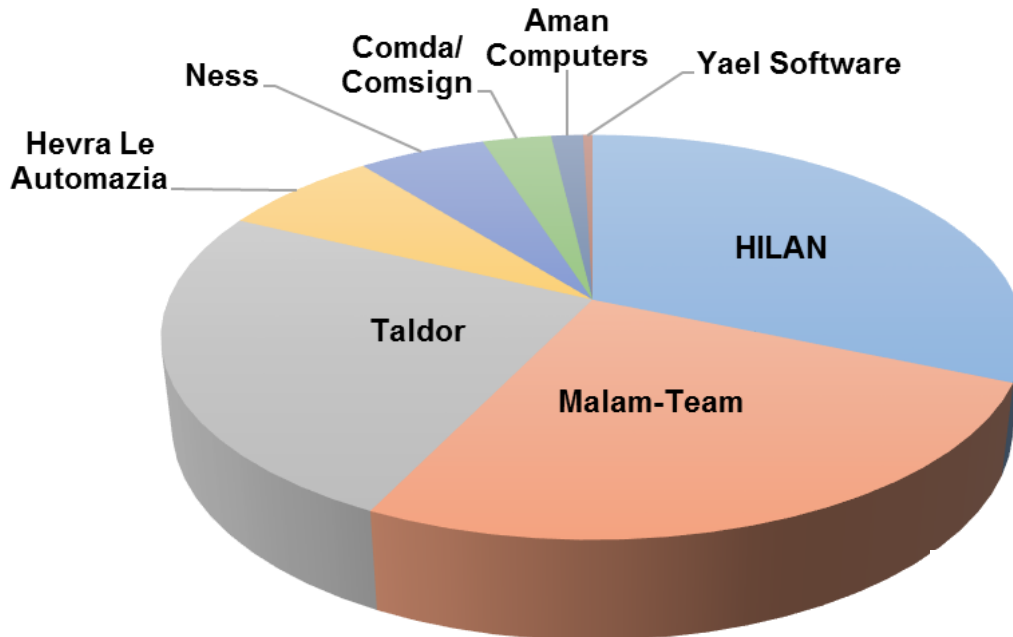


	2011		2012		2013		2014		2015
BPaaS	100.0	2.00%	102.0	0.00%	102.0	3.92%	106.0	0.00%	106.0
PaaS	4.0	50.00%	6.0	33.33%	8.0	25.00%	10.0	200.00%	30.0
DRaaS	2.0	300.00%	8.0	25.00%	10.0	50.00%	15.0	33.33%	20.0
SaaS	40.0	5.00%	42.0	42.86%	60.0	20.00%	72.0	11.11%	80.0
IaaS	6.0	33.33%	8.0	25.00%	10.0	20.00%	12.0	375.00%	57.0
totals	152.0	9.21%	166.0	14.46%	190.0	13.16%	215.0	36.28%	293.0

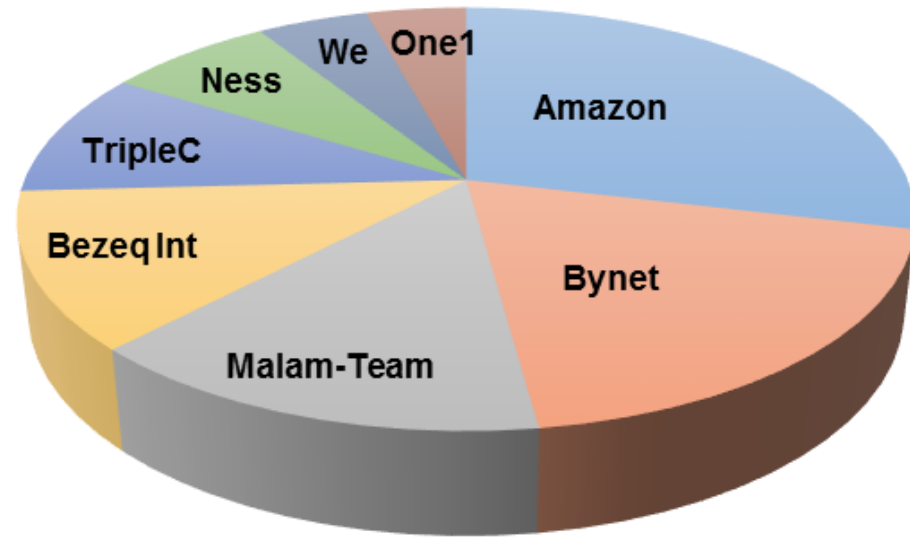
Market Players: BPaaS & IaaS Services 2012



We rank VENDORS by
REVENUE
 and
CLIENT MINDSHARE



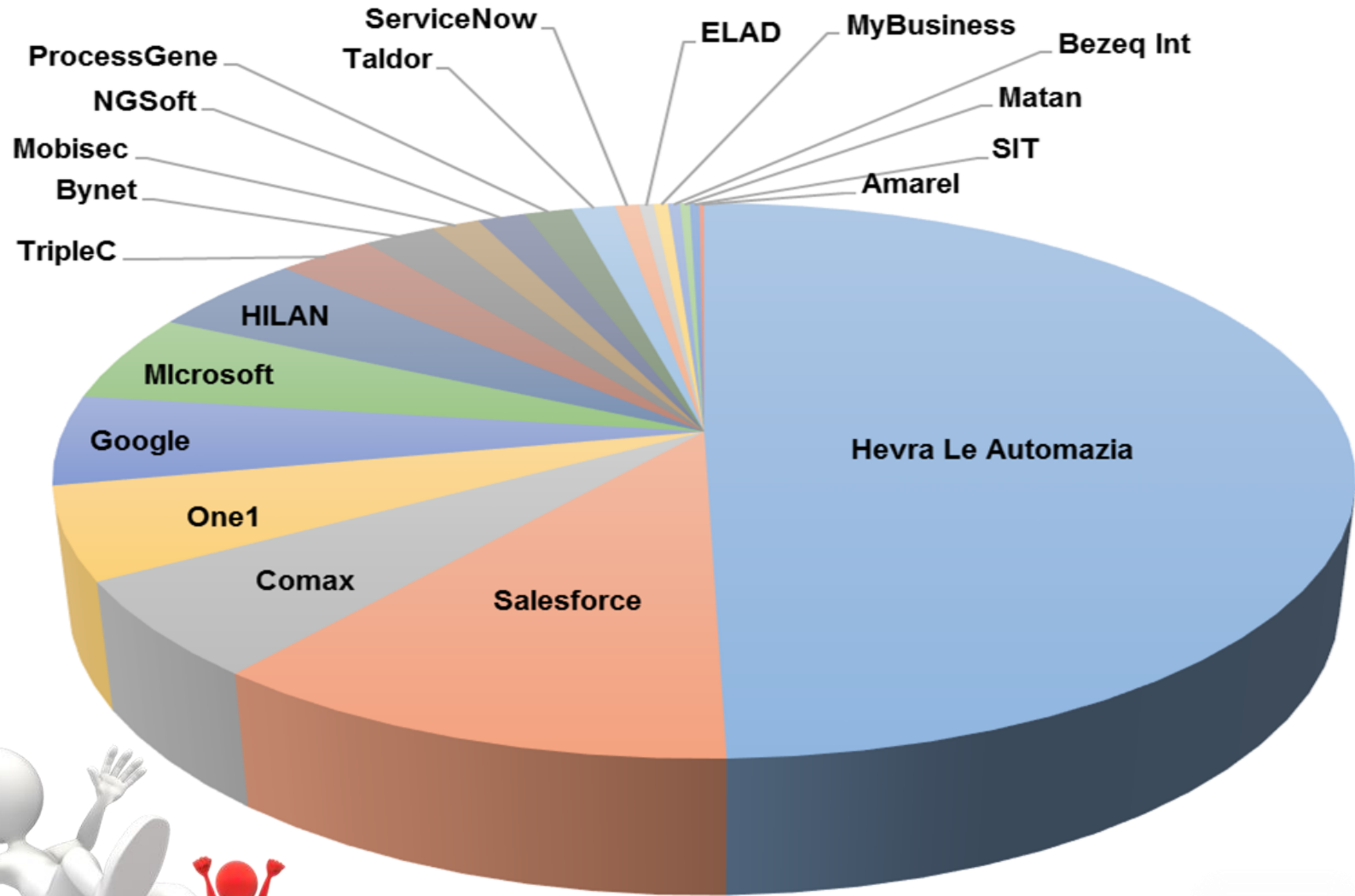
cloud: BPaaS



Cloud: IaaS

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Market Players: SaaS 2012



SaaS

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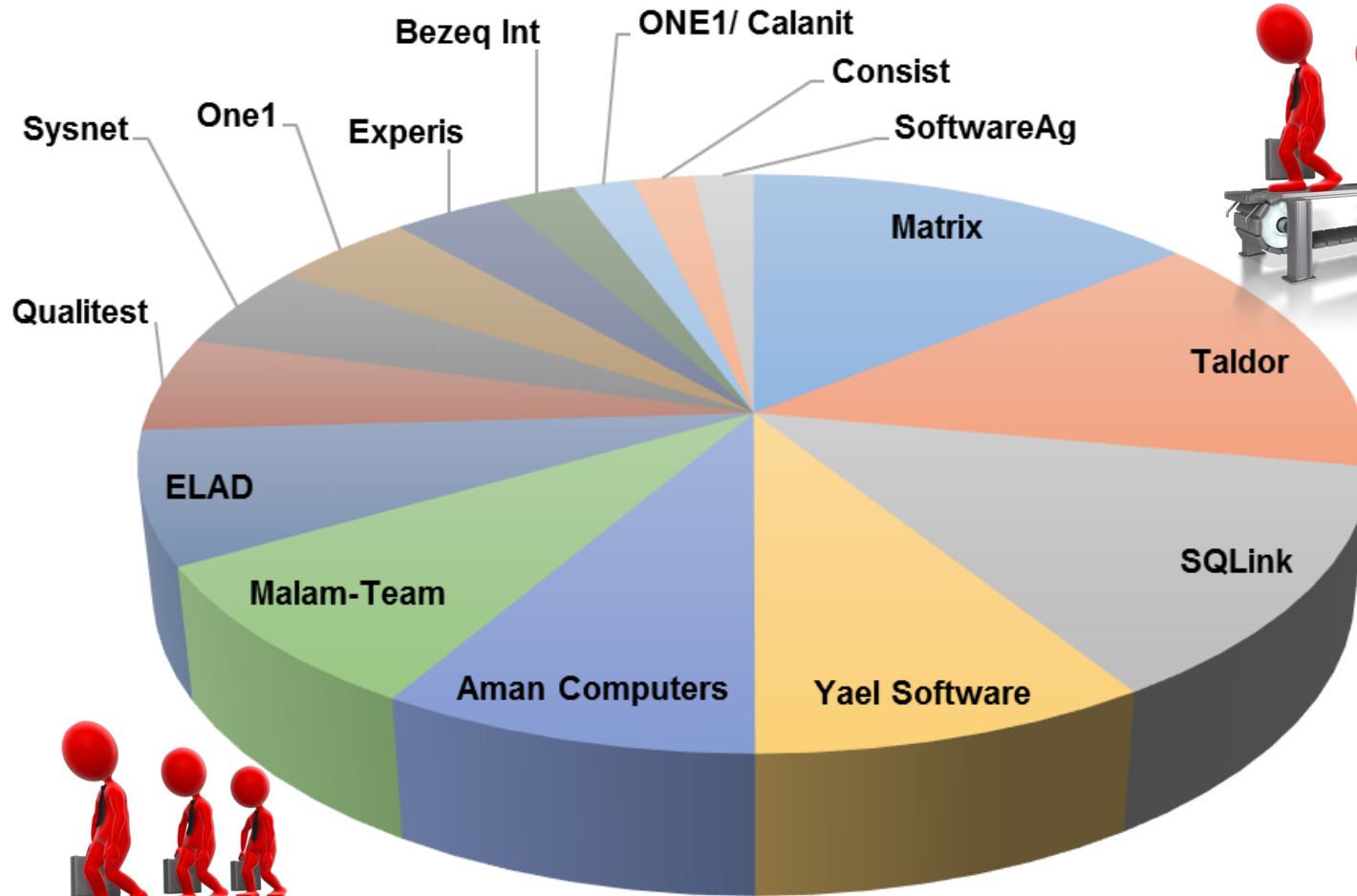


Israel 2011-15 Market : Staff Augmentation market



	2011		2012		2013		2014		2015
Staff Augmentation	350.0	-2.86%	340.0	-11.76%	300.0	-8.33%	275.0	-9.09%	250.0
Nearshore	100.0	8.00%	108.0	15.74%	125.0	48.00%	185.0	8.11%	200.0
totals	450.0	-0.44%	448.0	-5.13%	425.0	8.24%	460.0	-2.17%	450.0

Market Players: "gulgalot" 2012



Staff-Augmentation (gulgalot)

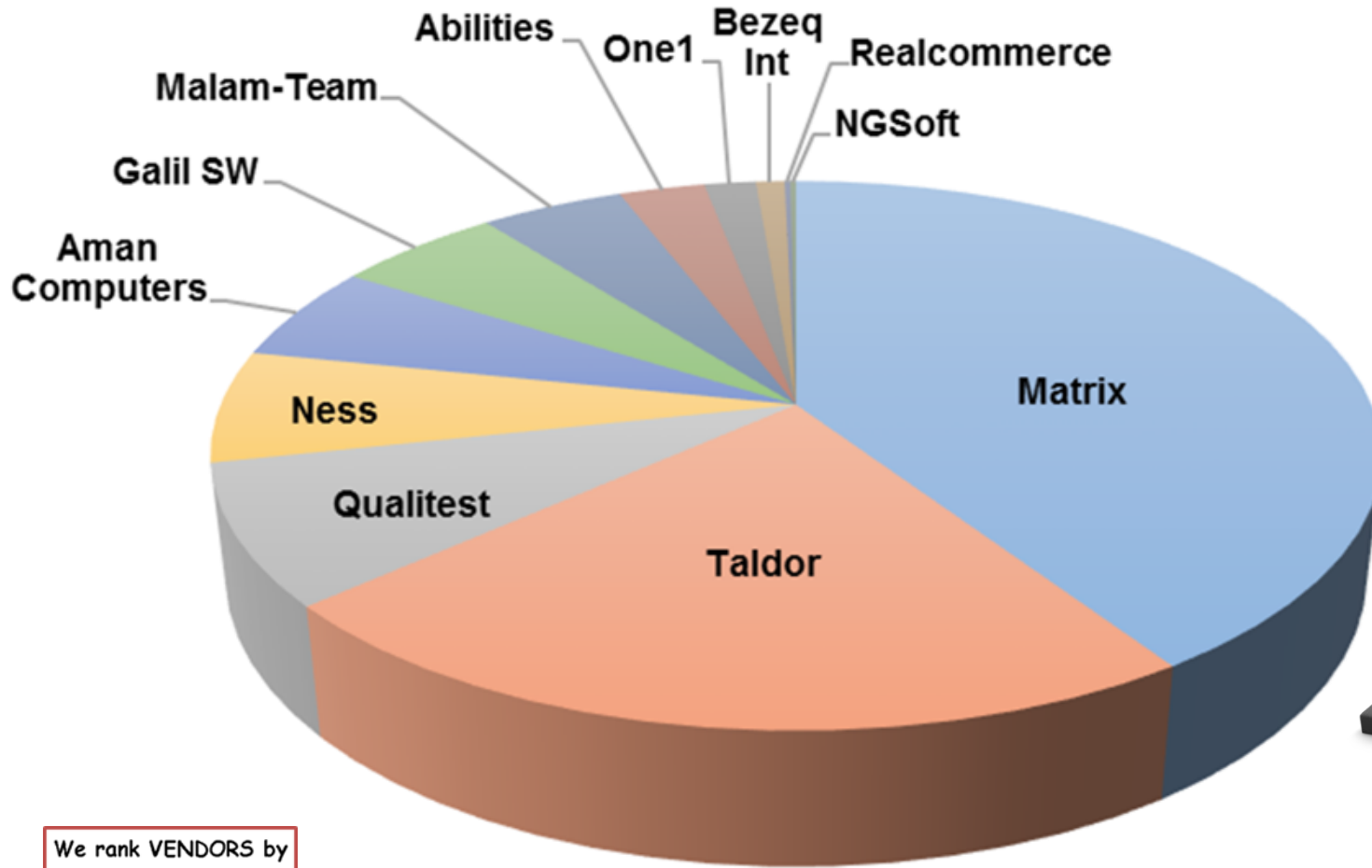
Tier 2
Tulip
Abilities
EMET
Eternity
Top Group
HMS
Comsec
UCC
LogOn
AZTEK
Dor -IT
HP
MindU
Opisoft
UBTECH
Realcommerce
Data Cube
GBS
Tata
Agile Sparks
BDO
Aginix
Applicat
Brillix

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Market Players: nearshore 2012



Staff Augmentation: nearshore

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