



2010



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Research Fellow

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People make IT not technology

Take away my people and leave the factories,
and soon there will be grass growing on the
factory floors, but take away my factories
and leave my people, and soon we will have
bigger and better factories.



Andrew Carnegie

Where IT Spending Will Go in 2010



STKI 2010 Israeli IT Study

2010

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**Road Maps
with 50 IT
organizations**

**Vendor
surveys**

**CIO
surveys**

**Interviews
with 115
CEOs
(vendors)**

**Interviews
with 150 CIOs
(all industries
represented)**

STKI Survey 2010

**Vendor
Briefings
with over
60 vendors**

**80
Roundtables**

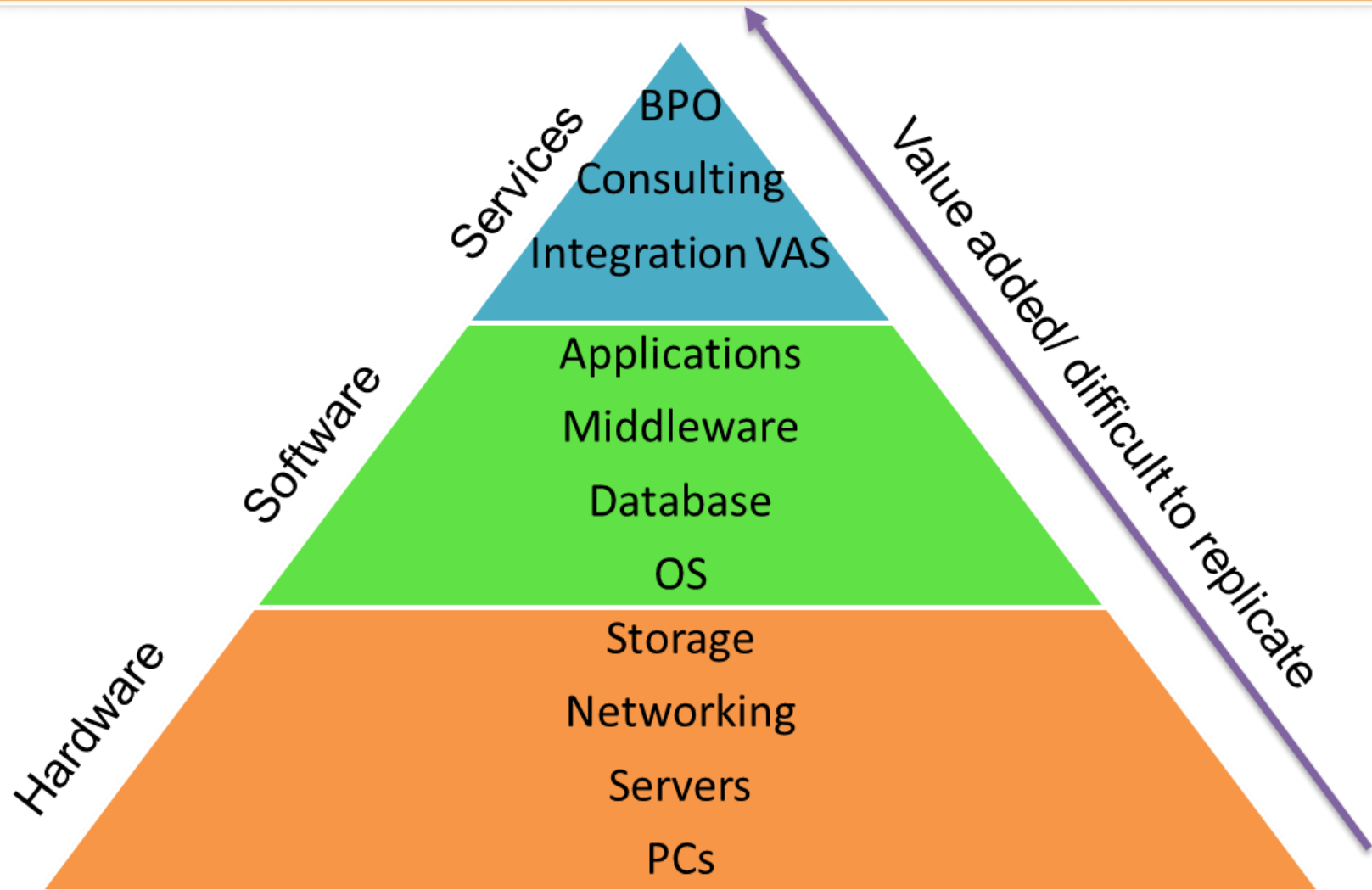
We rank VENDOR
PERFORMANCE
CLIENT AND SHARE

2010

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Differentiation and value added



Number of “organizations”

Type of organization	Number of employees	Number of organizations	IT Intensity
Enterprise	Over 1,000	236	CIO
Very large	401-1,000	419	
Large	151-400	1,470	
Medium	101-150	1,173	IT Manager
SMB Large	21-100	14,419	Outsourced
SMB Small	6-20	42,184	
SMB very small	<5	169,221	
Municipalities		335	Government Offices
Government		106	

Data from: Bituach Leumi 28/2/2010



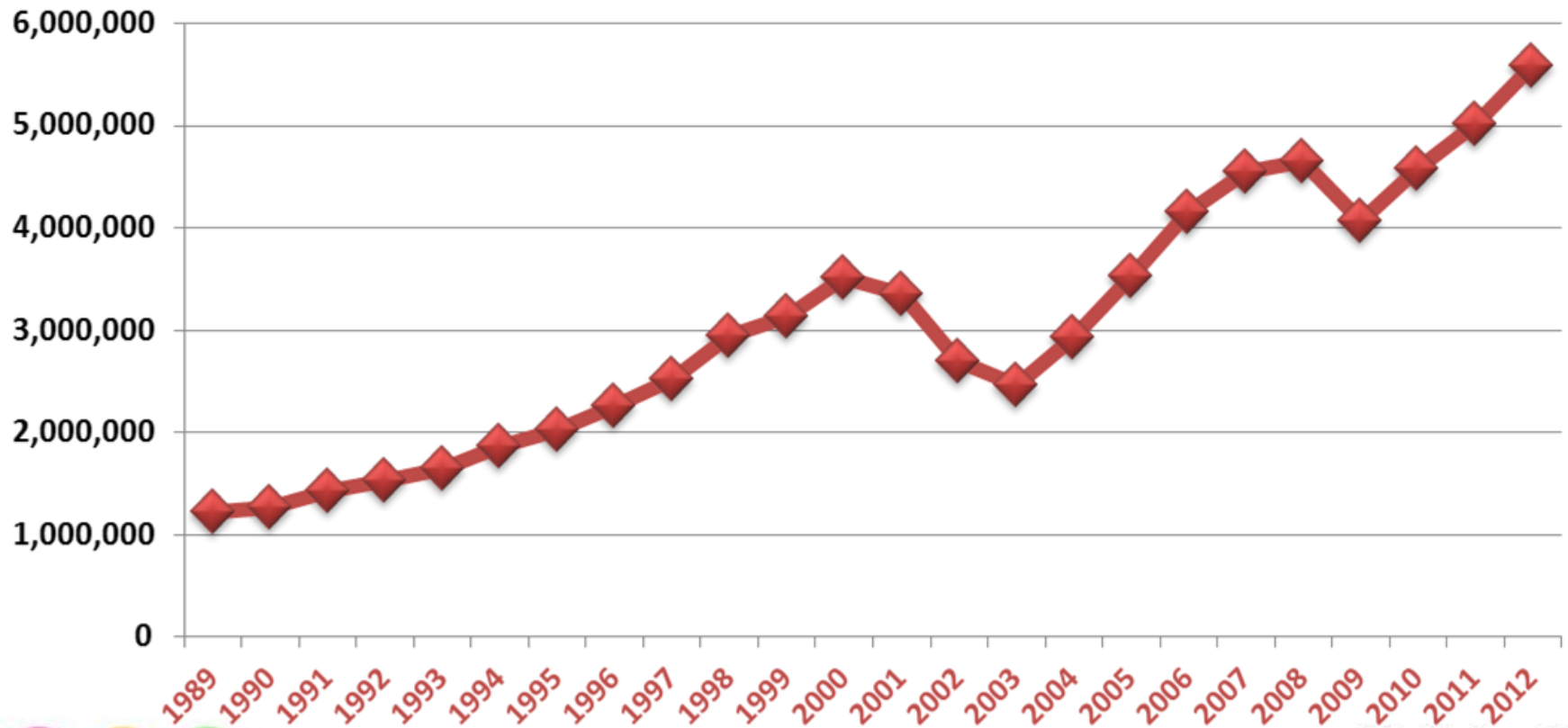
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STKI Annual IT Market Figures (\$MUSD)

(This figures represent the Israeli Enterprise IT Market only)

2008	2009	2010 (forecasted)	2011 (forecasted)	2012 (forecasted)
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4,645.0	-12.53%	4,063.0	12.60%	4,575.0	9.46%	5,008.0	9.25%	5,471.0
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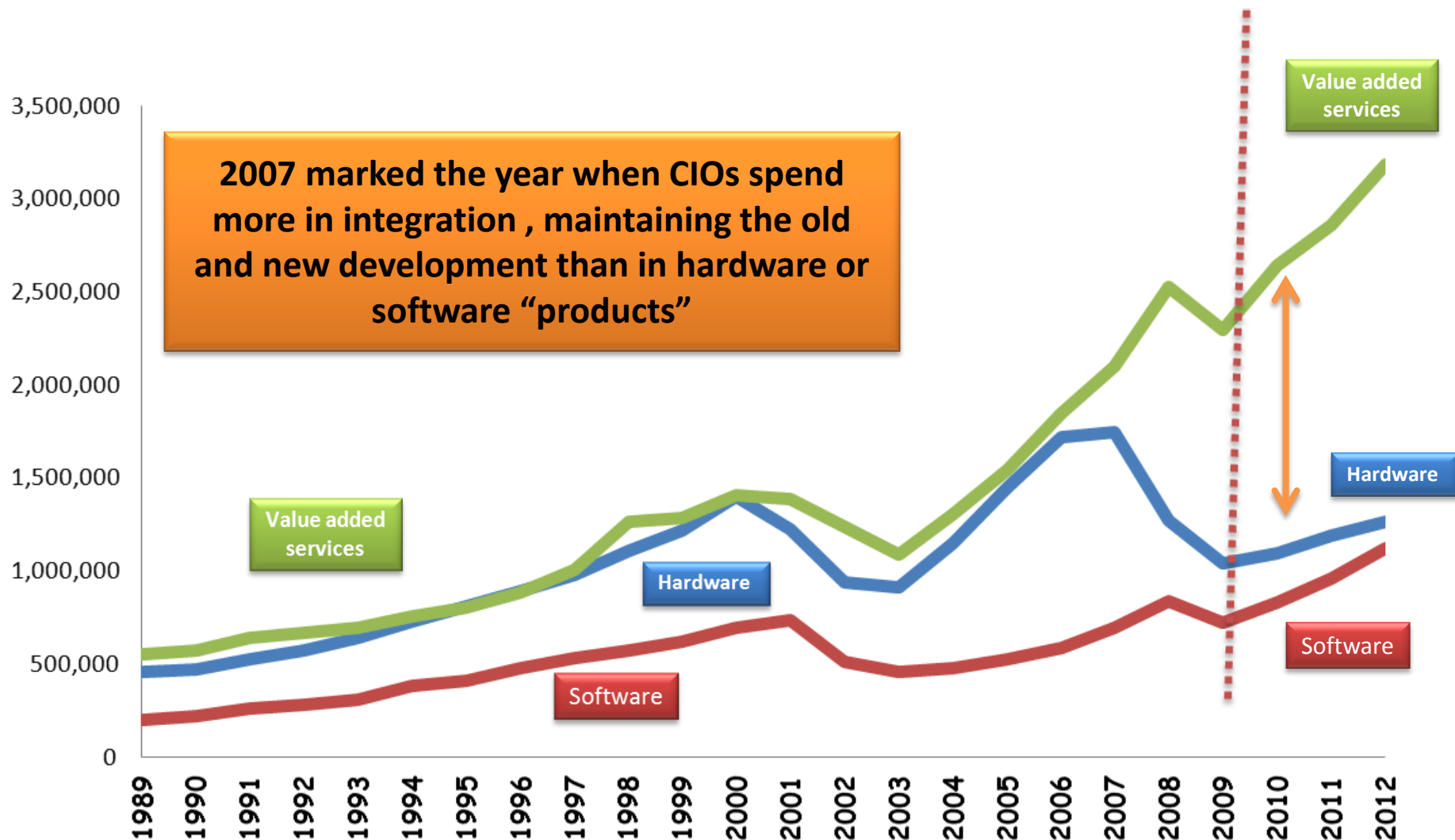


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IT rate of change



IT Markets in Israel (\$K USD)



IT “industry” share (%) per year

INDUSTRIES	2003	2004	2005	2006	2007	2008	2009	2010
Government + Education + Medicine	24.50%	16.90%	14.00%	10.00%	8.00%	10.00%	14.00%	15.74%
Security + Defence	14.80%	11.20%	11.00%	11.50%	10.50%	10.00%	12.00%	10.71%
Banking+ Insurance + Financial Services	14.80%	17.68%	27.00%	32.50%	34.00%	35.00%	30.00%	29.29%
Utilities + Transportation	4.90%	8.25%	9.40%	10.00%	12.00%	13.00%	15.00%	12.68%
Telecomm + High Tech	14.80%	23.97%	19.60%	16.00%	17.00%	15.00%	12.00%	14.21%
Manufacturing + Retail	19.70%	16.11%	11.00%	11.00%	10.00%	9.00%	7.00%	8.74%
S.M.B. s / home	6.50%	5.89%	8.00%	9.00%	8.50%	8.00%	10.00%	8.63%

Industries IT expenditures (K \$ USD)

All amounts in K \$ USD

industry	2003	2004	2005	2006	2007	2008	2009	2010
Government + Education + Medicine	603,680	495,556	493,500	416,000	363,600	464,500	568,820	720,000
Security + Defence	364,672	328,450	387,750	478,400	477,225	464,500	487,560	490,000
Banking+ Insurance + Financial Services	364,672	518,605	951,750	1,352,000	1,545,300	1,625,750	1,218,900	1,340,000
Utilities + Transportation	120,736	242,016	331,350	416,000	545,400	603,850	609,450	580,000
Telecomm + High Tech	364,672	702,998	690,900	665,600	772,650	696,750	487,560	650,000
Manufacturing + Retail	485,408	472,507	387,750	457,600	454,500	418,050	284,410	400,000
S.M.B. s / home	160,160	172,868	282,000	374,400	386,325	371,600	406,300	395,000

many more categories if “our” clients ask for them



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

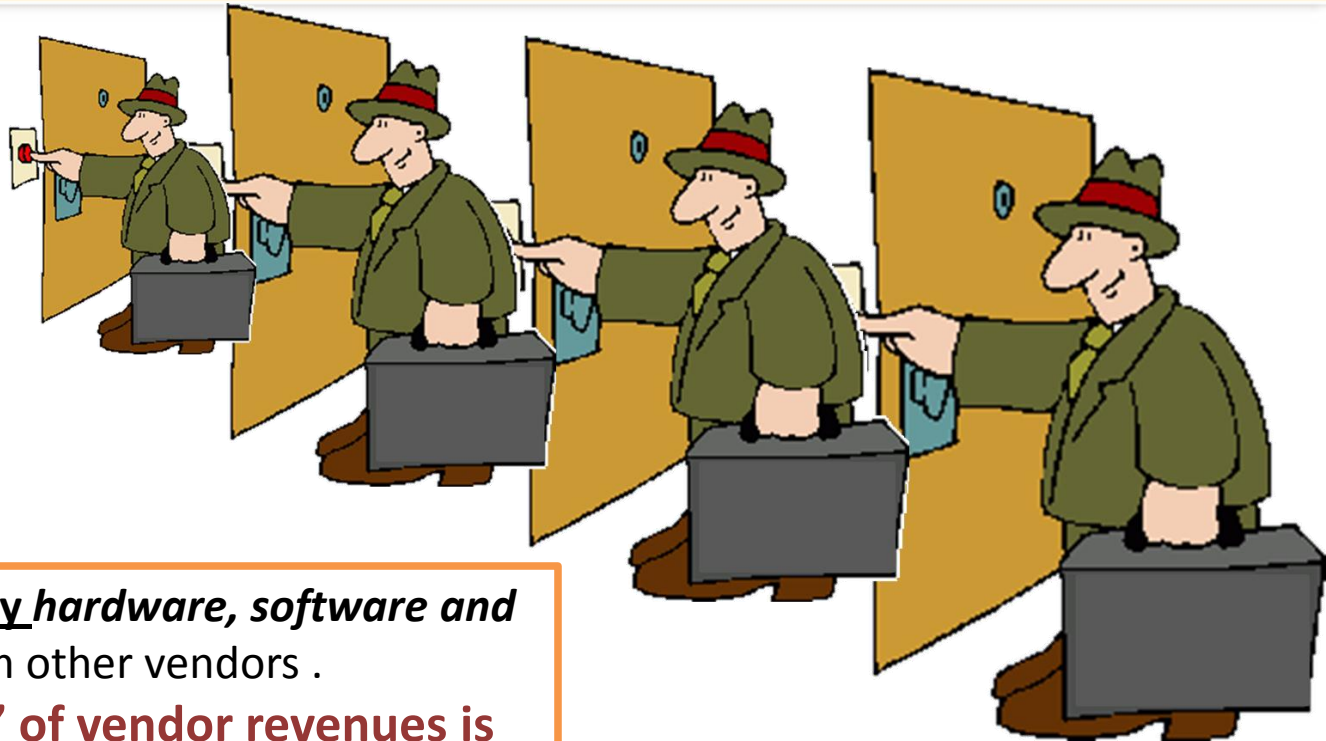
All amounts in M \$ USD

- Pockets of excellence
 - Users identified the need for experts
 - Most vendors are moving or moved into the new delivery model

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

Gore Vidal

Double-booking



Vendors commonly **buy hardware, software and services** from other vendors .

This is why “totals” of vendor revenues is higher than the total market values.

(Products are sold directly and thru several layers of partners)

TOP 9 IT Vendors in Israel



These 9 vendors either sell in all Hardware, Software and Services categories or they have extremely large market share in only part of the categories

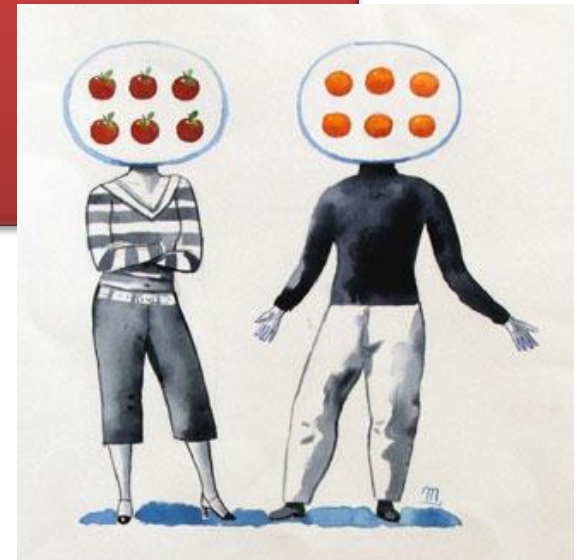
HP
Malam-Team
IBM
Matrix
Taldor
Ness
One
Microsoft
Bynet

Hardware Categories

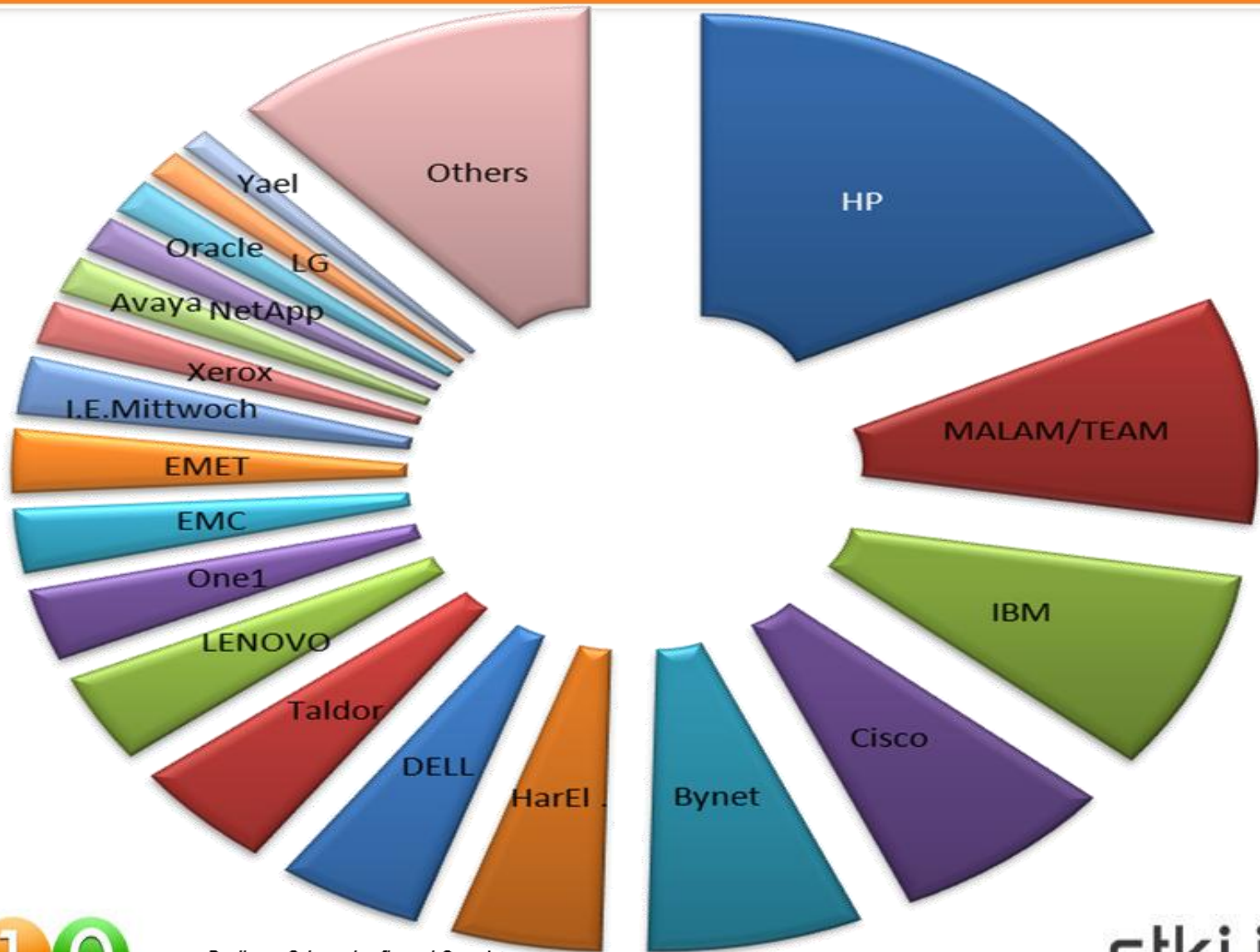
servers	x64	servers
blades		
non-x64		
notebooks	Clients	
desk		
others		
disks	storage	
tapes		
lan equipment	networking	
wan equipment		
VoIP equipment		
departamental	Printer	
personal		
Special Purpouse (ATMs, Kiosks, etc)		
computer room	Computer Supplies	
miscelaneus		

STKI mixes manufacturers and vendors in the hardware tiers because in Israel manufacturers sell to organizations that are not “global size enterprises” in several modes:

- ☐ Directly
- ☐ Through partners
- ☐ Hybrid



Hardware Market \$1,046 Million(2009)



Hardware Market

2008	2009		2010		2011		2012	
1,275.0	-17.96%	1,046.0	5.07%	1,099.0	8.28%	1,190.0	6.72%	1,270.0

1

HP
MALAM/TEAM
IBM
Cisco
Bynet
HarEl
DELL
Taldor
LENOVO
One1
EMET
EMC
I.E.Mittwoch
Xerox

2

Avaya
Oracle
NetApp
LG
Yael Software
Matrix
Lexmark
Samsung
Acer
HILAN (We)
ANKOR
TripleC CCC
Juniper
HDS

3

Alexander Schneider
APPLE
dorcom
F5
Alcatel
Konica
Toshiba
GlassHouse
benefit
Rittal
Enterasys
Radware
ELAD
DDN

All amounts in M \$ USD

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Servers

IBM
HP
MALAM/TEAM
DELL
HILAN (We)
One1
EMET
HarEl .
Bynet
TripleC
dorcom
Taldor
Yael
Matrix
Oracle
ANKOR
benefit
ELAD

IBM
HP
DELL
Oracle

manufacturers



IBM
HP
Oracle
I.E.Mittwoch

manufacturers

IBM
EMET
HP
Oracle
MALAM/TEAM
I.E.Mittwoch
HarEl .
One1
Taldor

X-64

X64 blades are becoming the standard

non-X64

This was the Year: IBM Mainframe installations grew

2008		2009		2010		2011		2012			
165.0	-33.33%	110.0	4.55%	115.0	-21.74%	90.0	-16.67%	75.0	servers	x64	
115.0	-20.00%	92.0	10.87%	102.0	12.75%	115.0	-21.74%	90.0	blades		
70.0	-14.29%	60.0	-16.67%	50.0	4.00%	52.0	15.38%	60.0	non-x64		
350.0	-25.14%	262.0	1.91%	267.0	-3.75%	257.0	-12.45%	225.0	totals		

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18

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Clients

HP
LENOVO
DELL
LG
Acer
APPLE
Toshiba
O T H E R S

manufacturers

notebooks

HP
LENOVO
DELL
MALAM/TEAM
HarEl
LG
Bynet
Acer
Yael Software
One1
APPLE
Matrix
Toshiba
Taldor
O T H E R S

HP
DELL
LENOVO
Acer
APPLE
O T H E R S

manufacturers

desk

2008		2009		2010		2011		2012	
200.0	-12.50%	175.0	5.71%	185.0	8.11%	200.0	2.50%	205.0	notebooks
230.0	-23.91%	175.0	-2.86%	170.0	2.94%	175.0	14.29%	200.0	desk
		25.0	60.00%	40.0	87.50%	75.0	46.67%	110.0	others
430.0	-12.79%	375.0	5.33%	395.0	13.92%	450.0	14.44%	515.0	totals

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We rank VENDORS by
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Storage Equipment

EMC
NetApp
IBM
HDS
HP
DELL
Oracle
DDN

manufacturers



Backup ≠ DRP ≠ Archiving
Architectures

EMC
MALAM/TEAM
NetApp
IBM
ANKOR
HDS
HP
GlassHouse
EMET
One1
HarEl
DELL
Bynet
TripleC CCC
DDN
Matrix
Oracle
benefit
I.E.Mittwoch
Taldor
Yael Software

2008		2009		2010		2011		2012		Yael Software	
130.0	-7.69%	120.0	12.50%	135.0	3.70%	140.0	3.57%	145.0	disks		
15.0	-33.33%	10.0	20.00%	12.0	8.33%	13.0	15.38%	15.0	tapes		
145.0	-10.34%	130.0	13.08%	147.0	4.08%	153.0	4.58%	160.0	totals		

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2010

Networking Equipment

Cisco
Juniper
Avaya
F5
HP
3com
Alcatel
Enterasys
Radware

Avaya
Cisco
Tadiran
Alcatel
3com

VoIP / Call Center

manufacturers

Network Equipment

Bynet
Taldor
MALAM/TEAM
HarEl
I.E.Mittwoch
Bezeq Benleumi
Matrix
One1
Yael Software

2008	2009		2010		2011		2012		
80.0	-25.00%	60.0	8.33%	65.0	15.38%	75.0	20.00%	90.0	lan equipment
50.0	-20.00%	40.0	12.50%	45.0	37.78%	62.0	12.90%	70.0	wan equipment
40.0	-20.00%	32.0	9.38%	35.0	14.29%	40.0	12.50%	45.0	VoIP equipment
170.0	-22.35%	132.0	9.85%	145.0	22.07%	177.0	15.82%	205.0	totals

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Printers and “new” services

HP
Xerox
Lexmark
Samsung
Konica
others



2008		2009		2010		2011		2012		
100.0	-18.00%	82.0	3.66%	85.0	7.06%	91.0	9.89%	100.0	departamental	
80.0	-18.75%	65.0	-7.69%	60.0	3.33%	62.0	4.84%	65.0	personal	
180.0	-18.33%	147.0	-1.36%	145.0	5.52%	153.0	7.84%	165.0	totals	

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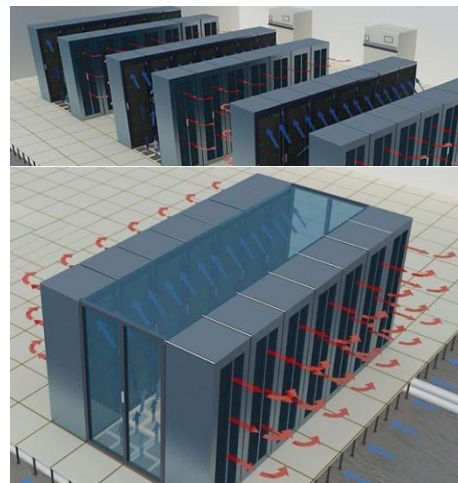
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Special Categories

I.E.Mittwoch
Taldor
Bynet
IBM
Netwise
One1



Alexander Schneider
Rittal
HP
IBM
Bynet
APC
May-55
Malam/Team

mobile & special purpose
(POS, ATMs, Kiosks, etc)



computer room accessories

2008	2009		2010		2011		2012			
100.0	-15.00%	85.0	5.88%	90.0	11.11%	100.0	20.00%	120.0	Special Purpose (ATMs, Kiosks, etc)	
30.0	-16.67%	25.0	40.00%	35.0	57.14%	55.0	27.27%	70.0	computer room	Computer Supplies
100.0	-25.00%	75.0	13.33%	85.0	5.88%	90.0	11.11%	100.0	miscelaneous	
230.0	-19.57%	185.0	13.51%	210.0	16.67%	245.0	26.53%	310.0	totals	

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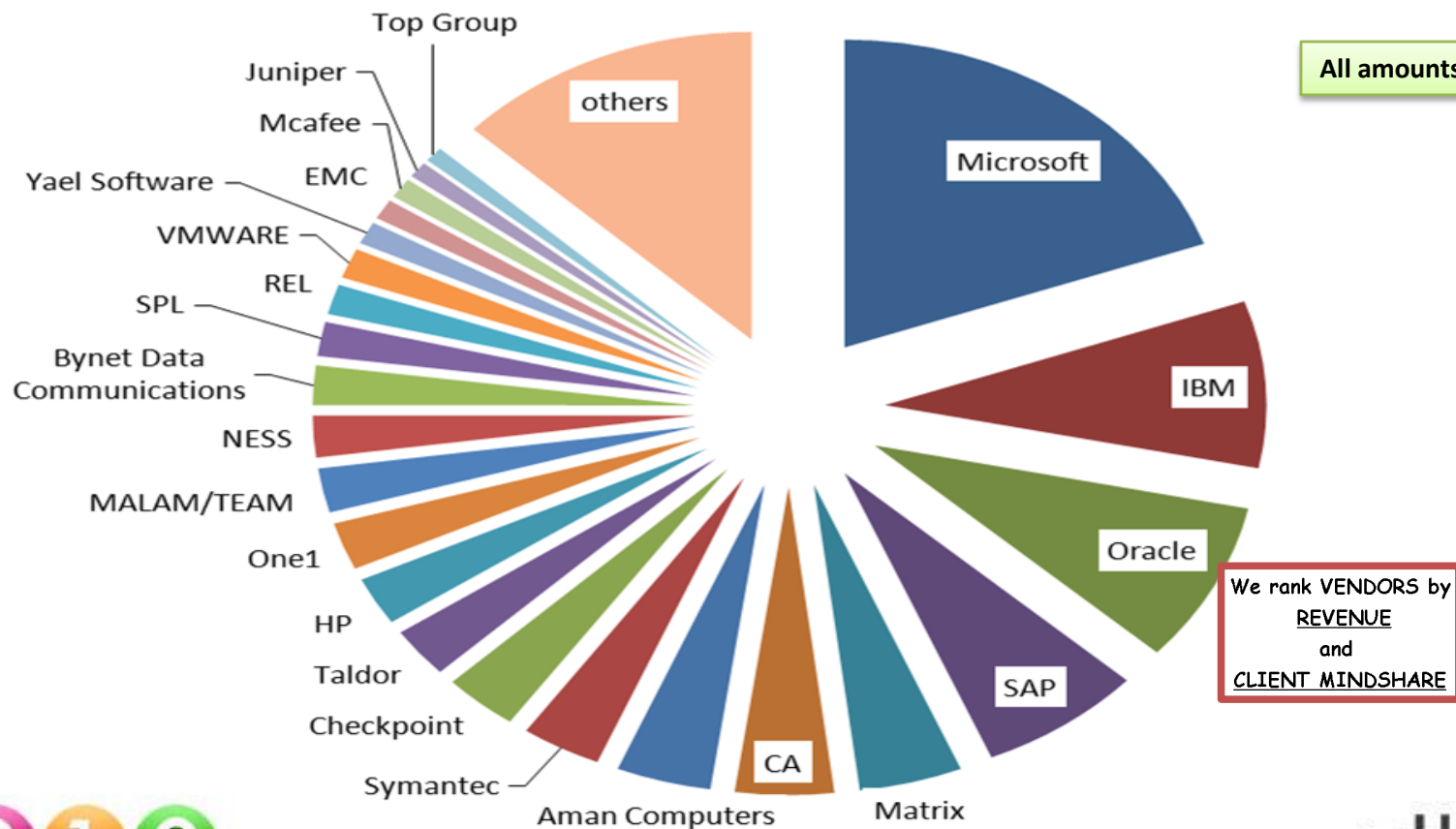
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Software Products

2008	2009	2010	2011	2012
840.0	-14.05%	722.0	15.37%	833.0
			15.13%	959.0
				6.05%
				1,017.0



2010

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Software Market

1

2

3

4

Microsoft
IBM
Oracle
SAP
Matrix
CA
Aman Computers
Symantec
Checkpoint
Taldor
HP
One1
MALAM/TEAM
NESS
Bynet
SPL
REL
VMWARE

Yael Software
EMC
Mcafee
Juniper
Top Group
Netvision 013
Autofont
Bezeq International
Comda
Consist
Gilon
HDS
MSP
NetApp
PANORAMA
Mia (SAS)
Qlikview
Ashbal
MAGIC ISRAEL

EL AD Systems
SRL
Alcatel
Comsec
I.E.Mittwoch
SIT
Xioma
Intentia
Advantech
Artis
Aviv Solut.
Centerity
Enterasys
Kav Maarachot
PNMSoft
Sapiens

Smile 012
Gstat
Avaya
Incentive Solutions
Otzar
Attunity
IT Navigator
Qlikview
benefit
F5
Business Solutions
Cemax
Netwise
Prodware
Radware

System Software

Microsoft
Aman
VMWARE
IBM
HP
HILAN (+We)
Bynet
Matrix
One1
benefit
Yael
Taldor
EL AD

Operating and
virtualization
systems

DBMS

Oracle
Microsoft
IBM
NESS
SPL
One1
Taldor
EL AD

Middleware

IBM
Oracle
Microsoft
Yael
One1
SPL
SAP
EL AD
SRL
Attunity
Magic
Taldor

2008	2009		2010		2011		2012		
80.0	-6.25%	75.0	-6.67%	70.0	-7.14%	65.0	-7.69%	60.0	operating systems
50.0	-4.00%	48.0	8.33%	52.0	5.77%	55.0	3.64%	57.0	data bases
50.0	-20.00%	40.0	12.50%	45.0	15.56%	52.0	44.23%	75.0	middleware
40.0	-5.00%	38.0	5.26%	40.0	10.00%	44.0	9.09%	48.0	output mgmt
220.0	-8.64%	201.0	2.99%	207.0	4.35%	216.0	11.11%	240.0	totals

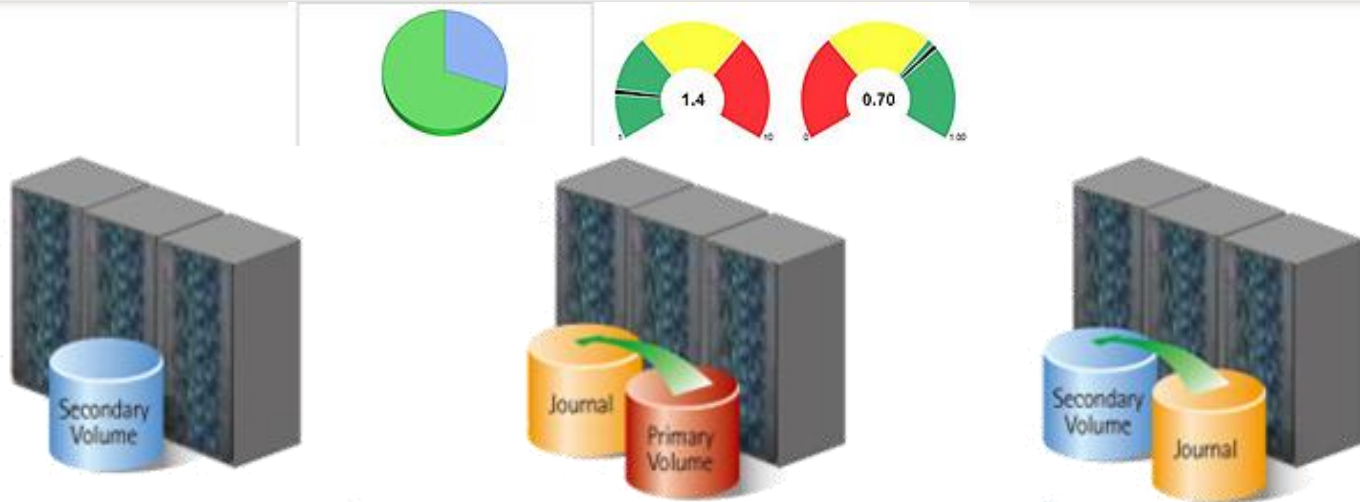
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IT Management Software

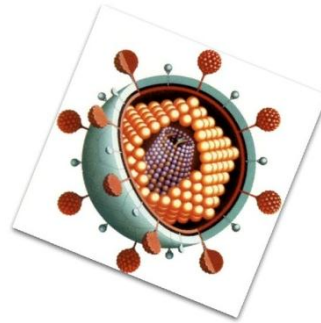


2008		2009		2010		2011		2012	
20.0	-15.00%	17.0	11.76%	19.0	21.05%	23.0	13.04%	26.0	Service Desk
60.0	-25.00%	45.0	11.11%	50.0	30.00%	65.0	10.77%	72.0	Enterprise system Mgmt
10.0	-20.00%	8.0	25.00%	10.0	50.00%	15.0	20.00%	18.0	Portfolio Management
15.0	-13.33%	13.0	15.38%	15.0	20.00%	18.0	27.78%	23.0	Asset Management
15.0	-20.00%	12.0	16.67%	14.0	21.43%	17.0	17.65%	20.0	project management
50.0	-10.00%	45.0	4.44%	47.0	10.64%	52.0	25.00%	65.0	Storage/ backup
90.0	-5.56%	85.0	23.53%	105.0	4.76%	110.0	9.09%	120.0	Security
260.0	-13.46%	225.0	15.56%	260.0	15.38%	300.0	14.67%	344.0	totals

IT Management Software

Service desk

CA
Matrix
BMC
HP
IBM
Consist
One1
Taldor
Symantec
Netwise
EL AD



Checkpoint
Symantec
Mcafee
CA
Juniper
IBM
Microsoft
Cisco
Radware

Security Software

Symantec

EMC

HDS

NetApp

IBM

Ankor

One1

Glasshouse

Taldor

Yael

EL AD

Enterprise System Management

CA

IBM

Matrix

BMC

HP

Symantec

Oracle

Aman

Centerity

NESS

Consist

Bynet

EL AD

Taldor

One1

Netwise

Storage/ backup/dedup

2010

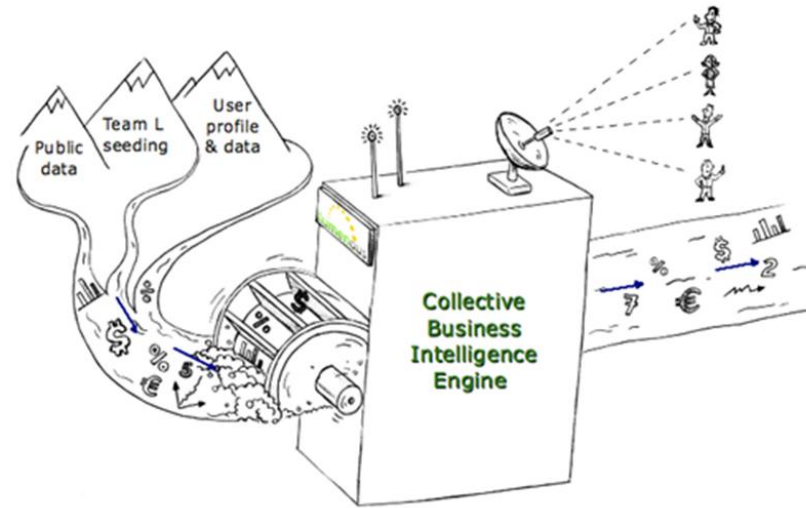
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and
CLIENT MINDSHARE

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Information Management Software



2008		2009		2010		2011		2012		
50.0	4.00%	52.0	5.77%	55.0	3.64%	57.0	5.26%	60.0	office productivity	
10.0	-20.00%	8.0	50.00%	12.0	50.00%	18.0	38.89%	25.0	portal & collaboration	
50.0	-10.00%	45.0	33.33%	60.0	8.33%	65.0	10.77%	72.0	modeling & development	
50.0	-16.00%	42.0	23.81%	52.0	25.00%	65.0	7.69%	70.0	BI / MDM/ ETL	
160.0	-8.13%	147.0	21.77%	179.0	14.53%	205.0	10.73%	227.0	totals	

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Cont: Information Management Software

IBM
SPL
Microsoft
Oracle
SAP
MAGIC
Sapiens
Matrix
One1
EL AD

DEVELOPMENT AND
MODELING

IBM
Aman Computers
SAP
Oracle
PANORAMA
Mia (SAS)
Matrix
Microsoft
I.E.Mittwoch
Gilon
SRL
One1
NESS
Qlikview
Yael Software
Gstat
Taldor
Bynet

BI / MDM/ ETL

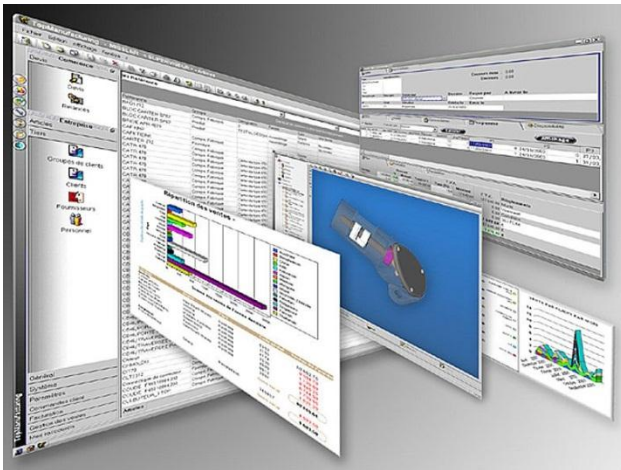
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Microsoft
IBM
SAP
One1
Taldor
Yael
EL AD

PORTAL &
COLLABORATION



Business Applications



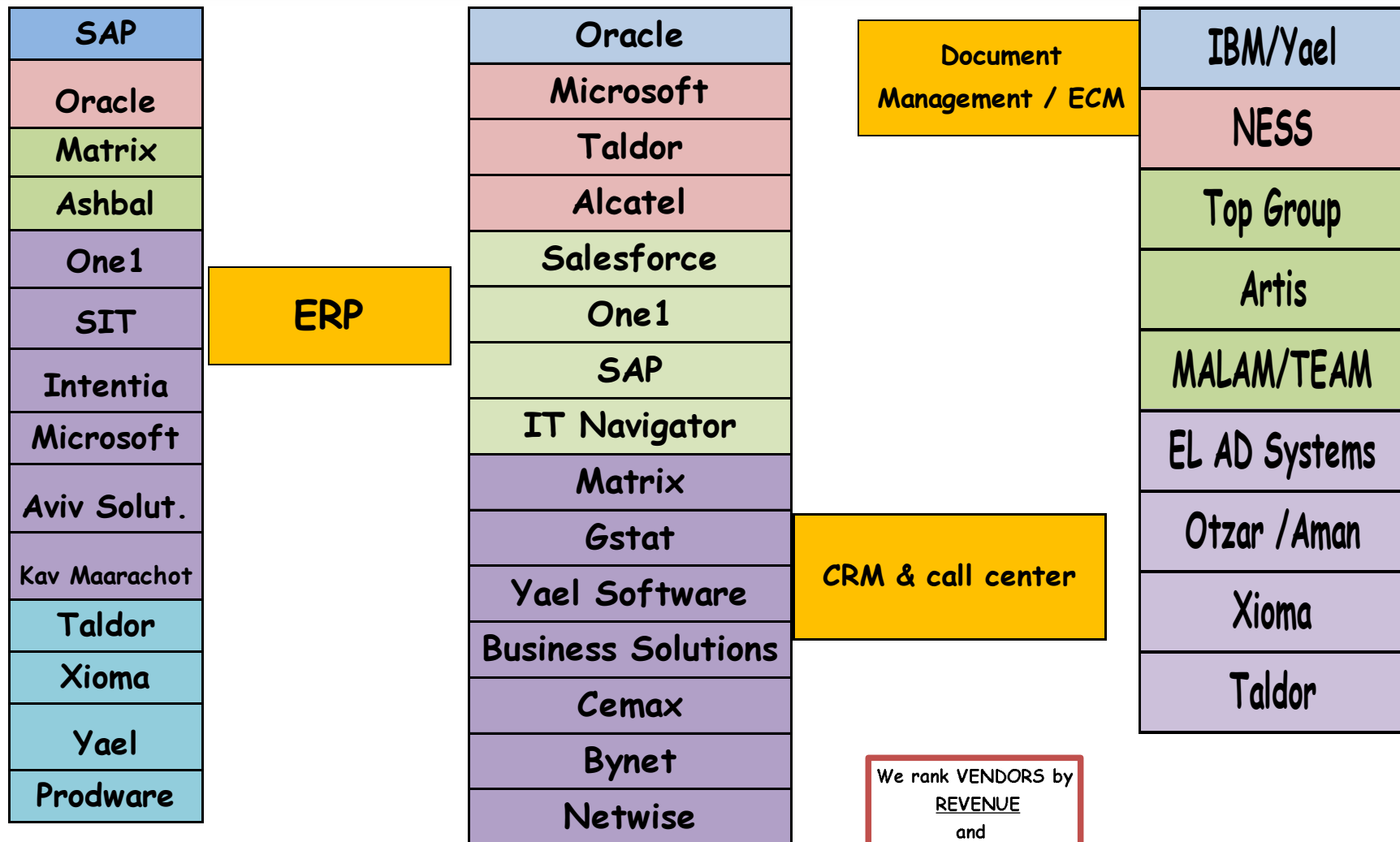
2008	2009		2010		2011		2012		
60.0	-41.67%	35.0	28.57%	45.0	33.33%	60.0	25.00%	75.0	vertical applications
40.0	-37.50%	25.0	40.00%	35.0	28.57%	45.0	33.33%	60.0	ERP
35.0	-28.57%	25.0	20.00%	30.0	33.33%	40.0	50.00%	60.0	CRM
10.0	-20.00%	8.0	50.00%	12.0	25.00%	15.0	20.00%	18.0	BPM
15.0	20.00%	18.0	11.11%	20.0	25.00%	25.0	40.00%	35.0	others
15.0	20.00%	18.0	22.22%	22.0	13.64%	25.0	36.00%	34.0	Document Management
175.0	-26.29%	129.0	27.13%	164.0	28.05%	210.0	34.29%	282.0	totals



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Business Applications



Testing Software



HP
IBM
Matrix
Aman
Top Group

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and
CLIENT MINDSHARE

2008	2009		2010		2011		2012	
25.0	-20.00%	20.0	15.00%	23.0	21.74%	28.0	21.43%	34.0

All amounts in M \$ USD



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Value Added Categories

Application Related	IT Consulting/ Analysts	
Infrastructure Related		
Management/ Performance/ BI		
Hardware Maintenance		
Hardware/Networking infrastructure Projects/		
Infrastructure/ Application/ SOA	System Integration	Project Services
Q/A & Testing		
Project Management Office		
web/ portal/mobile	Development	
core		
ERP		
CRM		
knowledge management		
.NET		
open source/java		
mainframe		
BI/DW		
Migrations/ GIS/ others		

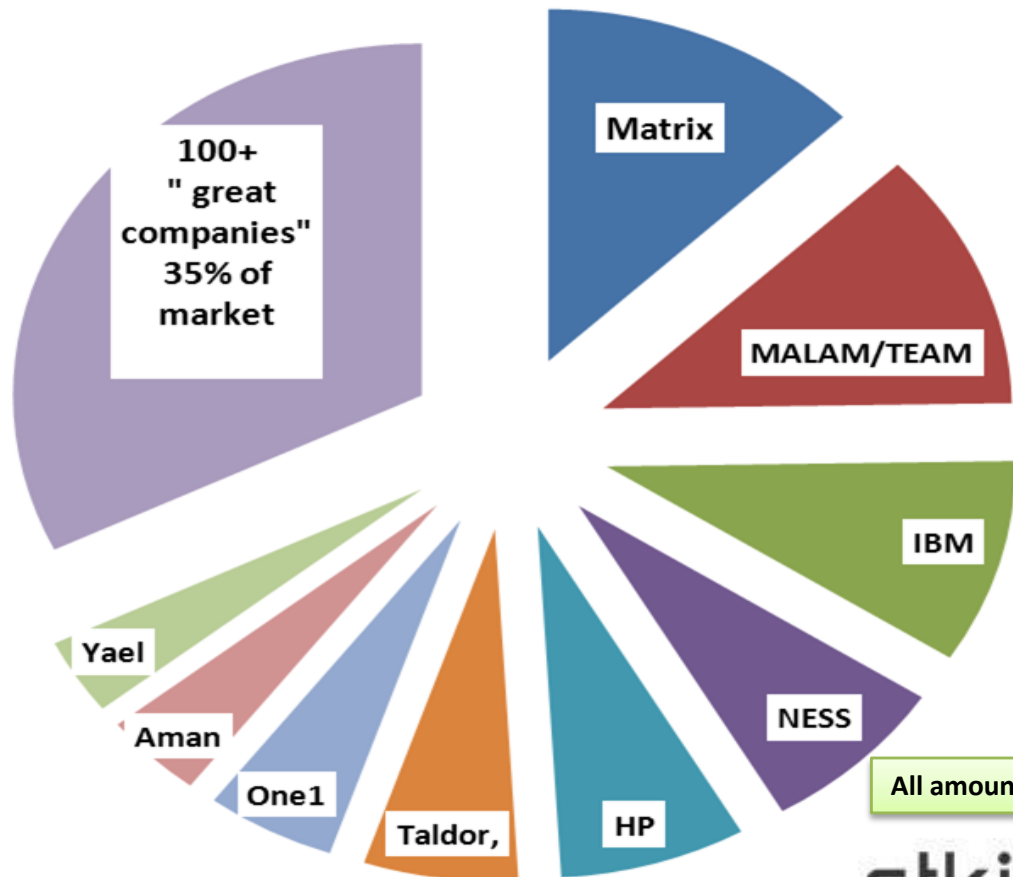


IT Training/ Hatmaa	
Data Center Environment	
Printing	
VoIP	
Governance & Risk Management	Governance, Risk and Regulation
Security	
"off site" data center	Outsourcing
BPO services	
call center	
help desk	
Complete outsourcing	
application outsourcing	
infrastructure outsourcing	
cloud computing	
cloud computing (applications)	
cloud computing (development)	
storage	contractors staff augmentation
DBA	
project	
long-term	
temps	

Value Added Services Market

2008	2009	2010	2011	2012				
2,530.0	-9.29%	2,295.0	15.16%	2,643.0	8.17%	2,859.0	11.37%	3,184.0

Matrix
MALAM/TEAM
IBM
NESS
HP
Taldor
One1
Aman
Yael Software



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

All amounts in M \$ USD

2010

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35

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THE KNOWLEDGE INTEGRATORS

Cont: Value Added Services

1	2	3	4	5
Matrix	Bezeq International	Aviv Solut.	Ergo	SecOz
MALAM/TEAM	Gilon	EMC	Orantech	Tulip
IBM	Tata	HighView	Vision BI	Blink
NESS	Netwise	Libi Tech	Kav Maarachot	Activeview
HP	GlassHouse	SEKER	benefit	OIC
Taldor	HMS	SIT	BitPlus	Dortal
One1	LogOn	Xioma	MATAN	Ron Gabi
Aman	SRL	Top Group	Proceed	Rozental Avi
Yael Software	OPISOFT	Eternity	ROM	Neway
Automazia	ewave	BDO	TopIT	PZ Projects
HILAN (+We)	Tesnet	Avnet	Strauss	Ratio
I.E.Mittwoch	Mind-U	Mateor	BI-pro	Data Cube
Calanit Carmon	Tescom	Salesforce	Business Solutions	Digidoc
EMET	Methoda	Bugsec	Afarsec	niTeo
Bynet	Gstat	Deloitte	Byon	Normative
SQLink	IT Navigator	HarEl Comp.	CommIT	Pareto
Advantech	Mertens Hoffman	IT Solutions	DorIT	Tefen
EL AD Systems	Consist	NewAge	Hacktics	
	Comsec	Point of View	ITIL Consulting	
	Accenture	YANA Group	Luria	
	Sensecom	Blat-Lapidot	ManofIT	
	Comda	Business & Decisions	Nihulim	

IT Consultants & Analysts

Matrix
Netwise
HMS
Methoda
Accenture
SEKER
Mateor
IT Solutions
IBM
NESS
Aman
Sensecom
BitPlus

Strauss
OIC
Blat-Lapidot
Ergo
Orantech
Tulip
Ron Gabi
Top Group
BDO
Yael Software
SRL
Consist
Other Consultants

Application
Related

2008	2009		2010		2011		2012		
20.0	-25.00%	15.0	33.33%	20.0	35.00%	27.0	11.11%	30.0	Application Related
25.0	-20.00%	20.0	0.00%	20.0	35.00%	27.0	11.11%	30.0	Infrastructure Related
30.0	-16.67%	25.0	20.00%	30.0	6.67%	32.0	9.38%	35.0	Management/
75.0	-20.00%	60.0	16.67%	70.0	22.86%	86.0	10.47%	95.0	totals

All amounts in M \$ USD



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Cont: consulting / analysts

Infrastructure Related

GlassHouse
Methoda
Mind-U
NESS
IBM
Aman
EL AD Systems
CommIT
DorIT
Dortal
Rozental Avi
Yael Software
Bynet
Consist
BDO
Other Consultants

Gilon
Methoda
Accenture
Mateor
IBM
Aman
HMS
Eternity
Point of View
Consist
NESS
Yael Software
BitPlus
HighView
Libi Tech
Strauss
SRL
Netwise
Bynet
BDO
niTeo
Top Group
BI-pro
Other Consultants

Management / Performance/ BI

hardware/ networking/infrastructure /DRP/ management & maintenance

IBM
HP
MALAM/TEAM
I.E.Mittwoch
Bynet
EMET
Taldor
EMC
Yael Software
One1
Matrix

Hardware
Maintenance

Hardware/Networking/
DRP/ Infra Projects

IBM
MALAM/TEAM
Bynet
EMET
GlassHouse
HILAN (+We)
HP
I.E.Mittwoch
Matrix
Bezeq International
Taldor
Aman
HDS
NESS
Yael
One1
Byon
CommIT
DorIT

2008	2009		2010		2011		2012		
160.0	-6.25%	150.0	0.00%	150.0	0.00%	150.0	0.00%	150.0	Hardware Maintenance
105.0	-9.52%	95.0	5.26%	100.0	20.00%	120.0	8.33%	130.0	Hardware/Networking infrastructure Projects/

All amounts in M \$ USD

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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Special integration services

Matrix
HILAN (+We)
MALAM/TEAM
HP
One1
Taldor
Bynet
Calanit Carmon
IBM
NESS
benefit
Consist
SRL
Yael Software
EL AD Systems

Infrastructure /
virtualization

Application

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

NESS
Matrix
MALAM/TEAM
Automazia
Yael Software
IBM
Aman
One1
HP
Taldor
EL AD Systems
Accenture
ewave
Tata
SRL
Blat-Lapidot
BDO
Bynet
Consist

2008	2009		2010		2011		2012		
120.0	16.67%	140.0	14.29%	160.0	3.13%	165.0	7.88%	178.0	Infrastructure/
50.0	-40.00%	30.0	16.67%	35.0	11.43%	39.0	7.69%	42.0	Application/ SOA
170.0	0.00%	170.0	14.71%	195.0	4.62%	204.0	7.84%	220.0	total



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TRAINING and HATMAA

Matrix
NESS
MALAM/TEAM
EL AD Systems
Taldor
One1
YANA Group
Netwise
Automazia

- Training, assimilation, implementation, rollout, etc: are change management processes.
- Change management that helps users change working processes.
- HATMAA: is the measurement of the change process success.

2008		2009		2010		2011		2012	
100.0	-10.00%	90.0	5.56%	95.0	5.26%	100.0	4.00%	104.0	

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REVENUE
and
CLIENT MINDSHARE



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Testing Q/A & PMO Services

Matrix
MALAM/TEAM
NESS
Tesnet
Tescom
Mertens Hoffman
Calanit Carmon
Taldor
Top Group
One1
Netwise
EL AD Systems

Q/A &
Testing

Software Testing & PMO
Outsourcing: An Idea
Whose Time Has Come?

Project
Management
Office

Matrix
Methoda
Xioma
One1
MATAN
Orantech
Netwise
Neway
PZ Projects
BDO
Tefen

2008	2009		2010		2011		2012		
240.0	-10.42%	215.0	13.95%	245.0	2.04%	250.0	2.00%	255.0	Q/A & Testing
20.0	-10.00%	18.0	38.89%	25.0	40.00%	35.0	20.00%	42.0	Project Management Office



Development Services

2008	2009		2010		2011		2012		
75.0	-20.00%	60.0	25.00%	75.0	-13.33%	65.0	23.08%	80.0	web/ portal/mobile
60.0	-33.33%	40.0	25.00%	50.0	20.00%	60.0	16.67%	70.0	core
100.0	-40.00%	60.0	25.00%	75.0	-13.33%	65.0	23.08%	80.0	ERP
70.0	-28.57%	50.0	4.00%	52.0	15.38%	60.0	8.33%	65.0	CRM
25.0	-20.00%	20.0	-25.00%	15.0	33.33%	20.0	25.00%	25.0	knowledge management
80.0	-2.50%	78.0	15.38%	90.0	-8.89%	82.0	3.66%	85.0	.NET
50.0	-10.00%	45.0	77.78%	80.0	-37.50%	50.0	10.00%	55.0	open source/java
40.0	12.50%	45.0	22.22%	55.0	9.09%	60.0	41.67%	85.0	mainframe
90.0	-11.11%	80.0	12.50%	90.0	0.00%	90.0	0.00%	90.0	BI/DW
70.0	-28.57%	50.0	20.00%	60.0	16.67%	70.0	21.43%	85.0	Migrations/ GIS/ others
660.0	-20.00%	528.0	21.59%	642.0	-3.12%	622.0	15.76%	720.0	totals

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and
CLIENT MINDSHARE

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Cont Development Services

Portal/ web /mobile

Netwise
Matrix
ewave
Taldor
One1
IBM
MALAM/TEAM
Bynet
NESS
Consist
HP
Aman
Blink
SRL

Matrix
MALAM/TEAM
Advantech
Taldor
IBM
HP
NESS
Sensecom
One1
Gilon
Yael
Aman
SIT
ManofIT
BeyondIT
Netwise
Blat-Lapidot
IT Navigator
Luria
EL AD

ERP

CRM & call center

Advantech
MALAM/TEAM
IBM
NESS
One1
Matrix
HP
Yael
Taldor
Mertens Hoffman
Aman
Aviv Solut.
Tata
SIT
Kav Maarachot
ManofIT
HMS
Prodware
xact
EL AD
BeyondIT
Top Group



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Cont Development Services

Yael
NESS
Top Group
EL AD
MALAM/TEAM
Matrix
Xioma
One1
HP
IBM
Taldor
SRL/Nihulim
Business Solutions
Ergo
ROM
Byon
Digidoc

BI/DW/ETL

knowledge
management
/ ECM

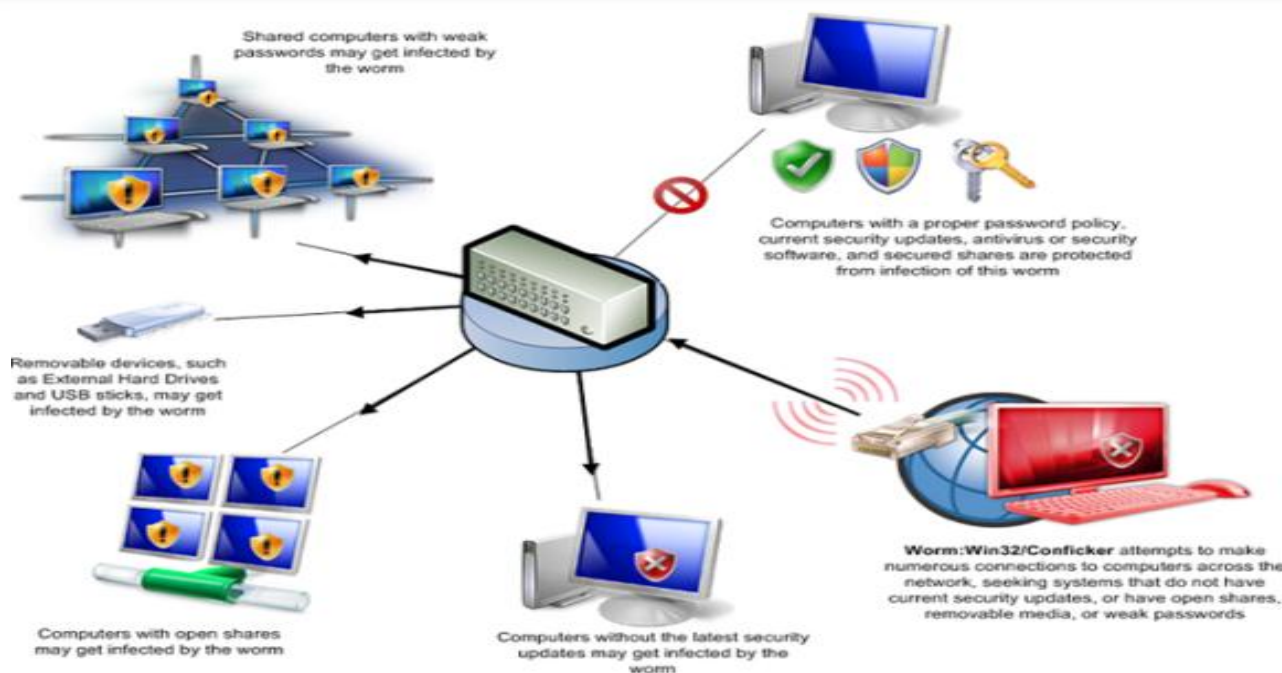
1

Gilon
OPISOFT
IBM
Consist
Eternity
HighView
One1
NESS
Matrix
Advantech
Gstat
HMS
SRL
MALAM/TEAM
I.E.Mittwoch
Libi Tech

2

Yael Software
Business & Decisions
Vision BI
HP
Point of View
Ergo
Aman
BI-pro
Top Group
TopIT
Activeview
Taldor
Ratio
Data Cube
Normative
Pareto
EL AD Systems

Governance, risk, security



Security:
Hwre, sfr and services
run over **5%** average of
IT budgets

2008	2009		2010		2011		2012		
35.0	42.86%	50.0	50.00%	75.0	9.33%	82.0	9.76%	90.0	Governance & Risk Management (also BCP)
95.0	-10.53%	85.0	11.76%	95.0	8.42%	103.0	6.80%	110.0	Security

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and
CLIENT MINDSHARE

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Governance, risk, security

MALAM/TEAM
Matrix
IBM
Gilon
HMS
Bugsec
Deloitte
BDO
Comsec
NESS
Taldor
ITIL Consulting
SecOz
Orantech
Proceed
Tulip
Yael Software

**Governance
& Risk
Management**

Bynet
MALAM/TEAM
Taldor
EMET
2Bsecure
Bezeq International
Netvision
One1
NewAge
Aman
Matrix
IBM
I.E.Mittwoch
HILAN (+We)
Avnet
NESS
Comda
HP
ewave
Comsec
Afarsec
Hacktics
BDO
EL AD Systems

Security

integration &
service

auditing

Comsec
BDO
Avnet
Accounting Firms

Special Project Services

Alexander Sneider
Bynet
IBM
Malam Team
Aman
Taldor

DATA CENTER
Design
/Implentation

VoIP

Bezeq International
IT Navigator
IBM
Bynet
I.E.Mittwoch
MALAM/TEAM
Taldor

2008	2009		2010		2011		2012		
50.0	-20.00%	40.0	25.00%	50.0	40.00%	70.0	28.57%	90.0	Data Center Environment
40.0	-25.00%	30.0	16.67%	35.0	14.29%	40.0	12.50%	45.0	Printing
40.0	-12.50%	35.0	28.57%	45.0	22.22%	55.0	27.27%	70.0	VoIP

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REVENUE
and
CLIENT MINDSHARE

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Outsourcing Services

2008	2009		2010		2011		2012		
60.0	0.00%	60.0	16.67%	70.0	21.43%	85.0	17.65%	100.0	"off site" data center (hosting, real estate, etc)
80.0	6.25%	85.0	11.76%	95.0	5.26%	100.0	20.00%	120.0	BPO services
30.0	-16.67%	25.0	40.00%	35.0	8.57%	38.0	10.53%	42.0	call center
25.0	20.00%	30.0	20.00%	36.0	16.67%	42.0	19.05%	50.0	help desk
140.0	0.00%	140.0	-7.14%	130.0	11.54%	145.0	13.79%	165.0	Complete outsourcing
25.0	0.00%	25.0	20.00%	30.0	6.67%	32.0	18.75%	38.0	application outsourcing
30.0	0.00%	30.0	16.67%	35.0	0.00%	35.0	20.00%	42.0	infrastructure outsourcing
0.0		10.0	50.00%	15.0	100.00%	30.0	66.67%	50.0	cloud computing
0.0		15.0	66.67%	25.0	80.00%	45.0	44.44%	65.0	cloud computing (applications)
0.0		5.0	140.00%	12.0	191.67%	35.0	28.57%	45.0	cloud computing (development)
390.0	8.97%	425.0	13.65%	483.0	21.53%	587.0	22.15%	717.0	totals



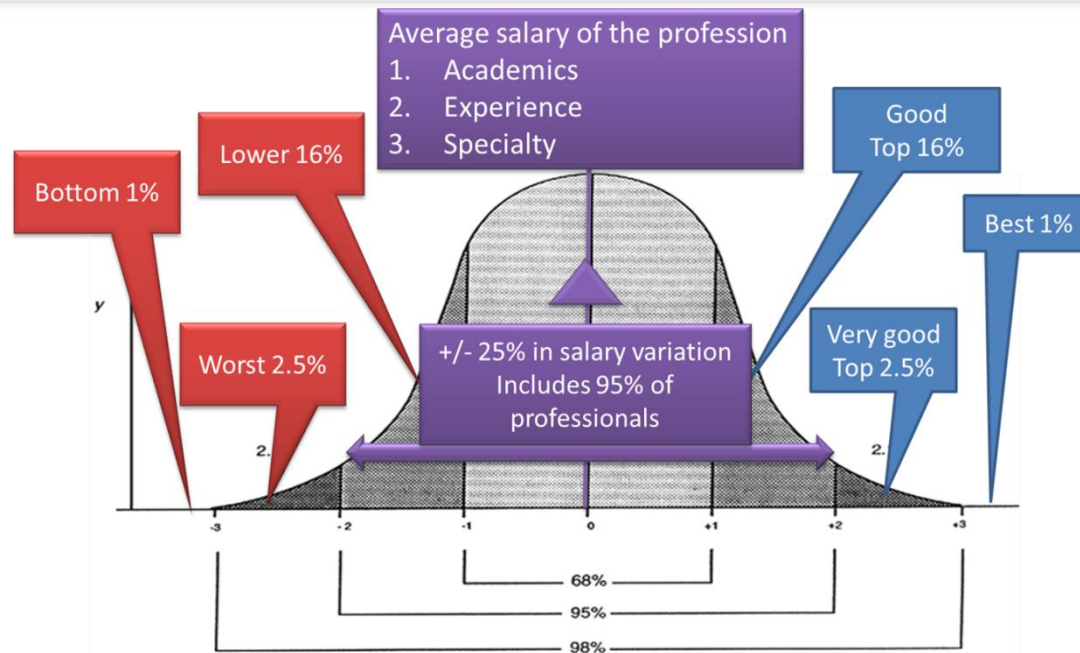
AI OUTSOURCING categories

HP
NESS
MALAM/TEAM
IBM
Automazia
One1
Aman
Matrix
Bynet
Yael Software
EL AD Systems
Taldor
Gilon
Top Group
SIT
Netwise

Complete outsourcing	application outsourcing	infrastructure outsourcing/ managed services
----------------------	-------------------------	---

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

IT Service Delivery (“good souls”)



2008	2009		2010		2011		2012		
20.0	-25.00%	15.0	33.33%	20.0	25.00%	25.0	16.00%	29.0	storage
20.0	-30.00%	14.0	42.86%	20.0	25.00%	25.0	8.00%	27.0	DBA
100.0	-10.00%	90.0	11.11%	100.0	20.00%	120.0	8.33%	130.0	project
120.0	-16.67%	100.0	4.00%	104.0	-3.85%	100.0	-15.00%	85.0	long-term
90.0	-5.56%	85.0	10.59%	94.0	-9.57%	85.0	-11.76%	75.0	temps
350.0	-13.14%	304.0	11.18%	338.0	5.03%	355.0	-2.54%	346.0	totals

2010

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51

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Cont. “good souls”

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CLIENT MINDSHARE

Matrix
Yael Software
One1
MALAM/TEAM
SQLink
Taldor
Aman
Calanit Carmon
SRL
OPISOFT
Mind-U
LogOn
NESS
EMET
EL AD Systems
Tata
HarEl Comp.
Bynet



Thank you

Dr. Jimmy Schwarzkopf