

24<sup>th</sup> Nov 2010



- General IT Market Update
- UK Training Market Update
- Some news from Assima

- "IT Technology industry will rebound quicker than the overall economy" (Forrester, Jan 2010)
- "IT Education Industry is tied to the fortunes of the IT Market" (IDC, Oct 2009)
- SAP and Oracle are the dominant market players
- "Where the US leads the UK follows... (Paul Stevens, Globe, Nov 2010)

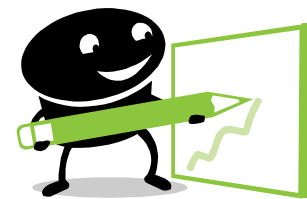
## Fact:

- US IT spending declined by 8.1% in 2009  
(Forrester, Jan 2010)



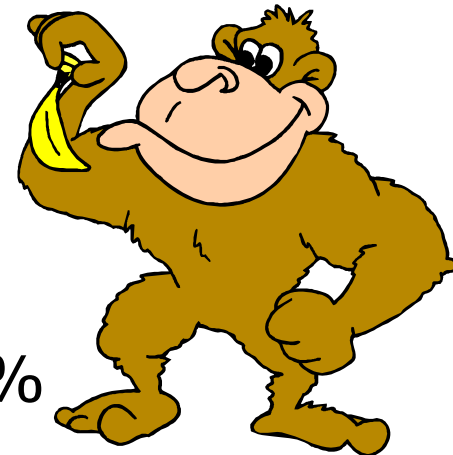
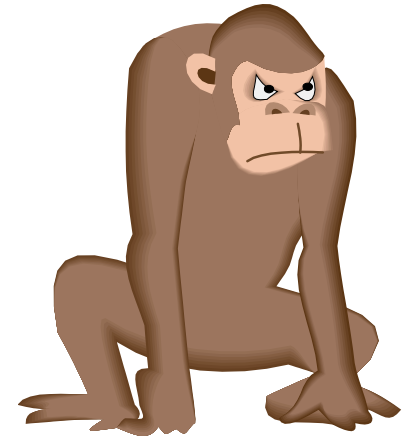
## Forecast:

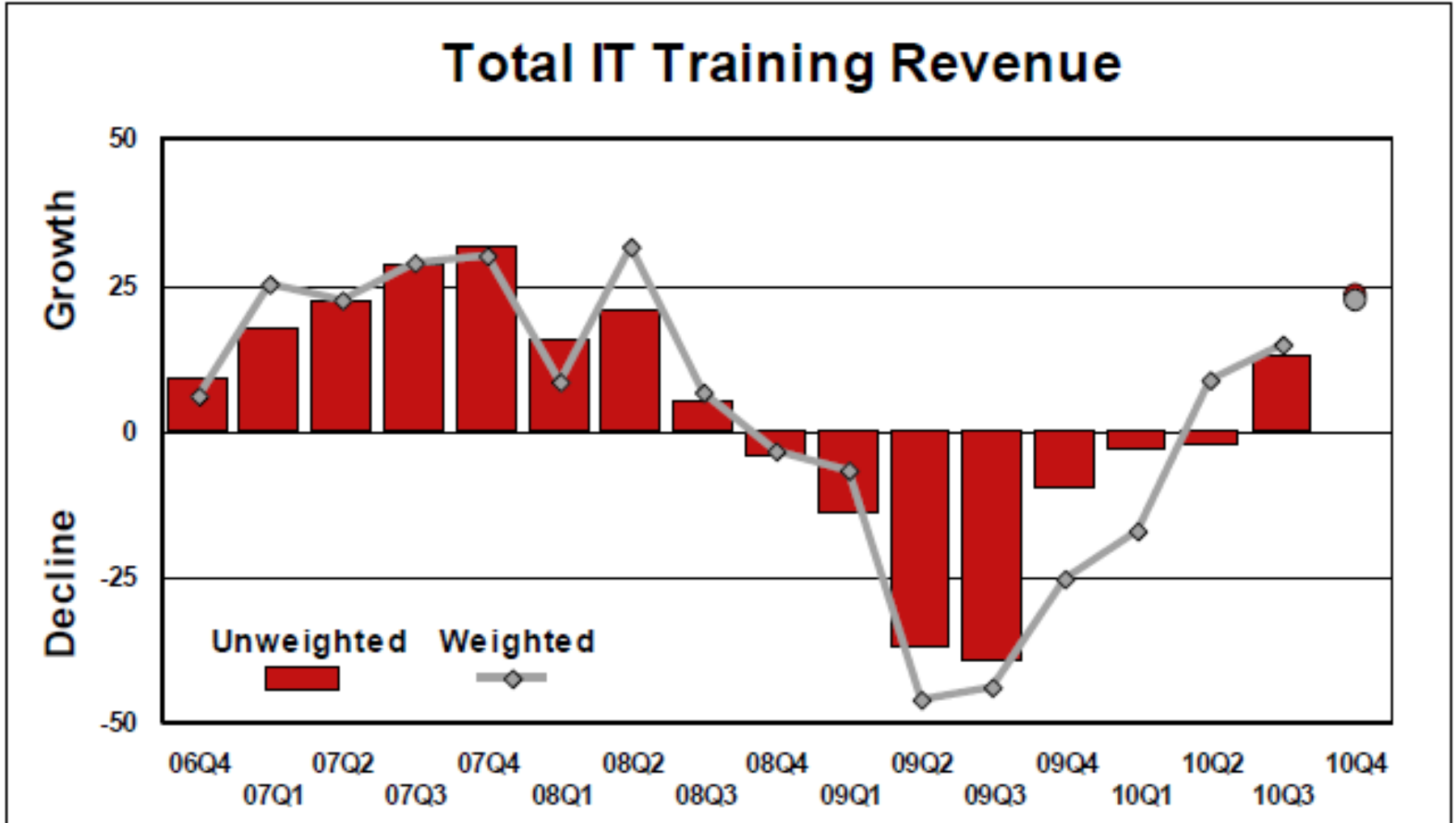
- US IT spending will grow by 8.1% in 2010  
(Forrester, Oct 2010)
- US IT spending will grow by 7.4% in 2011  
(Forrester, Oct 2010)
- Global IT spending will grow 1% to 7% in 2011  
(Forrester, Garner, IDC, Ovum Q3 2010)
- UK IT spending 0% to -2% 2011 (IDC Q3 2010)



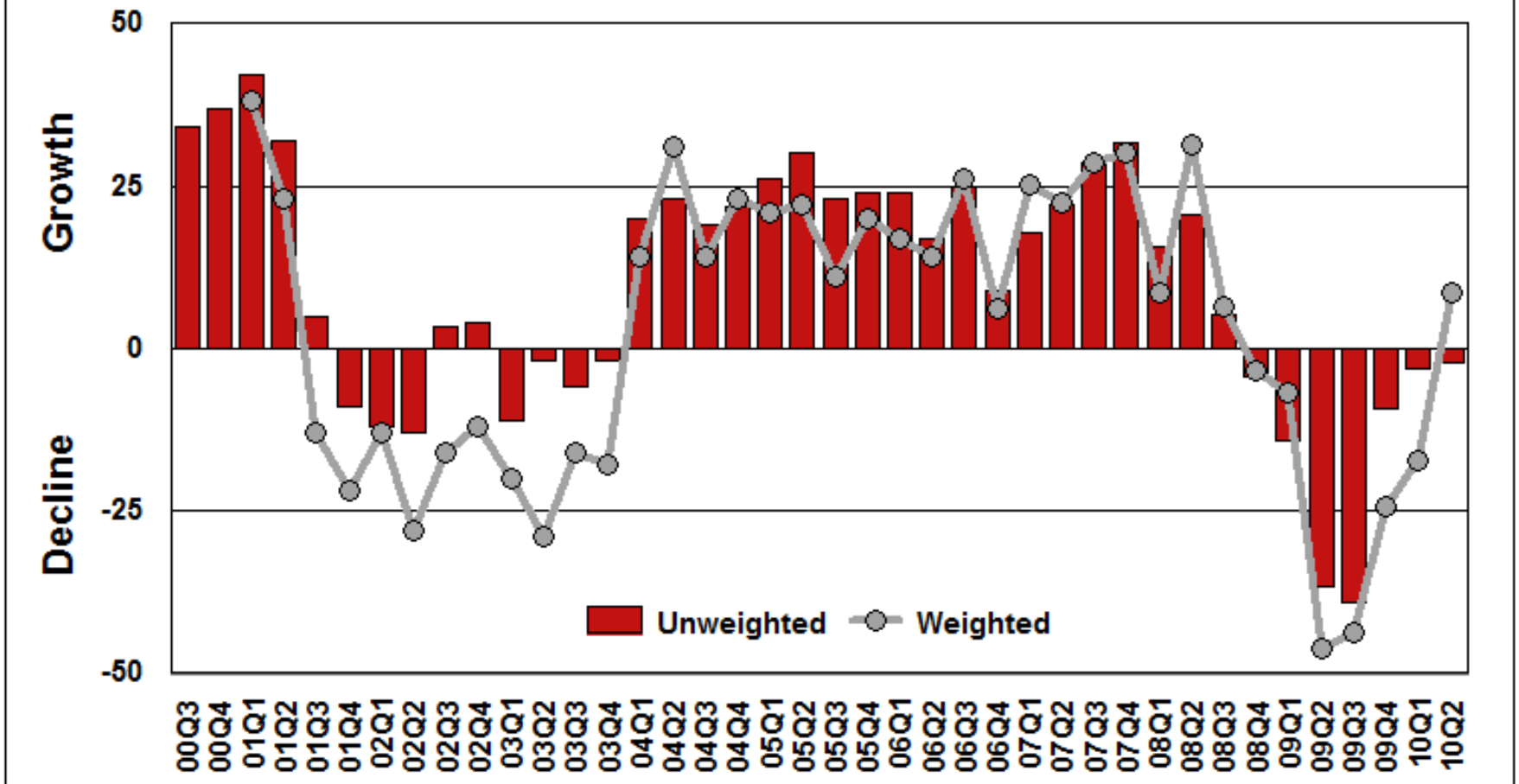
# The Big Gorillas, Then and Now....

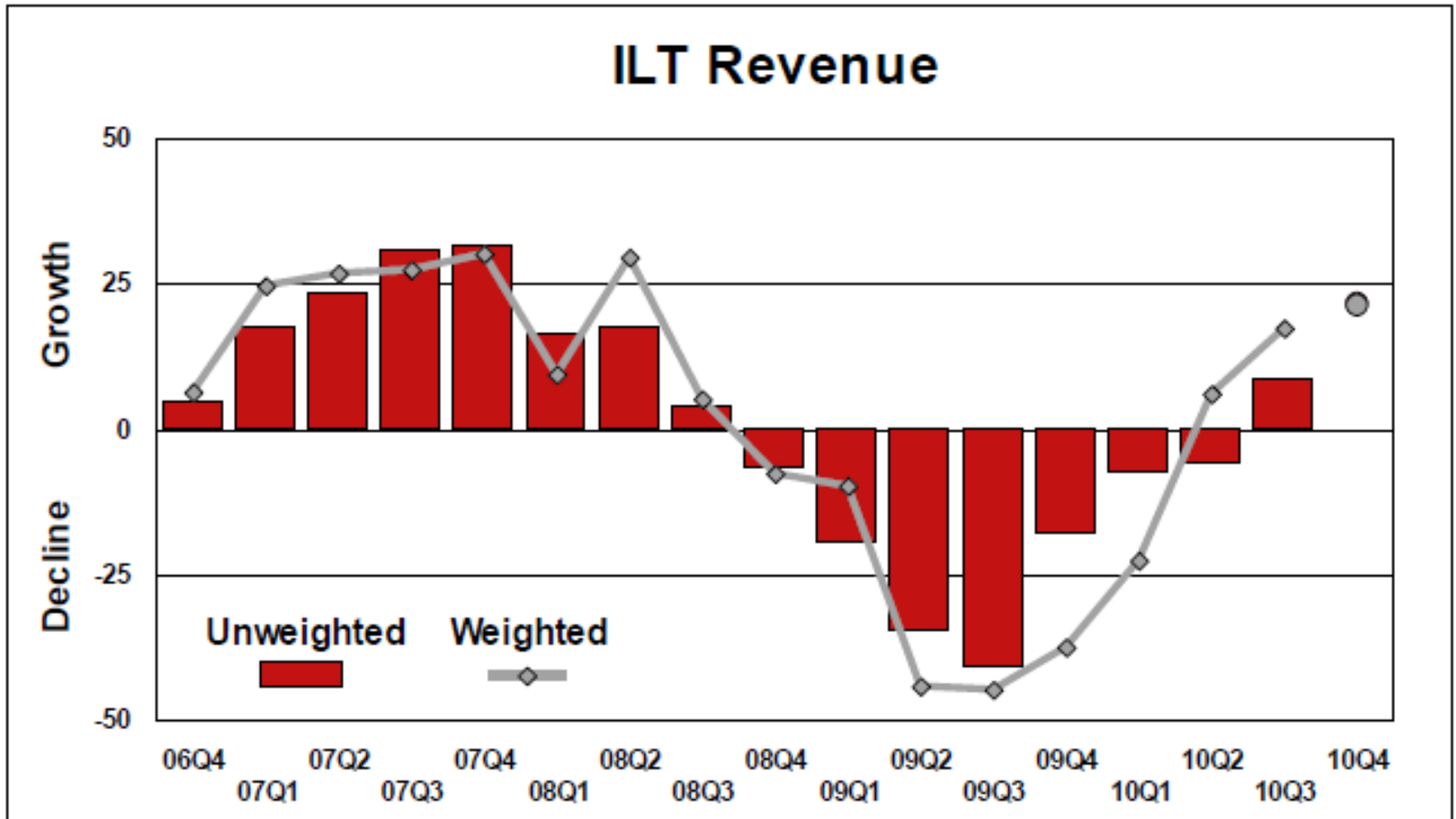
- SAP licence sales down 28%, overall revenues down 8% in 2009 (SAP, May 2010)
- Oracle licence sales down 7.1%, overall revenues flat in 2009 (Oracle, April 2010)
- SAP software & services up 20% Q3, up 16% 2010 year to date forecast 10% growth full year (SAP, Oct 2010)
- Oracle Q3 2010 software and related services revenue up 23%, predicting 12% increase in Q4 (Oracle, April 2010)



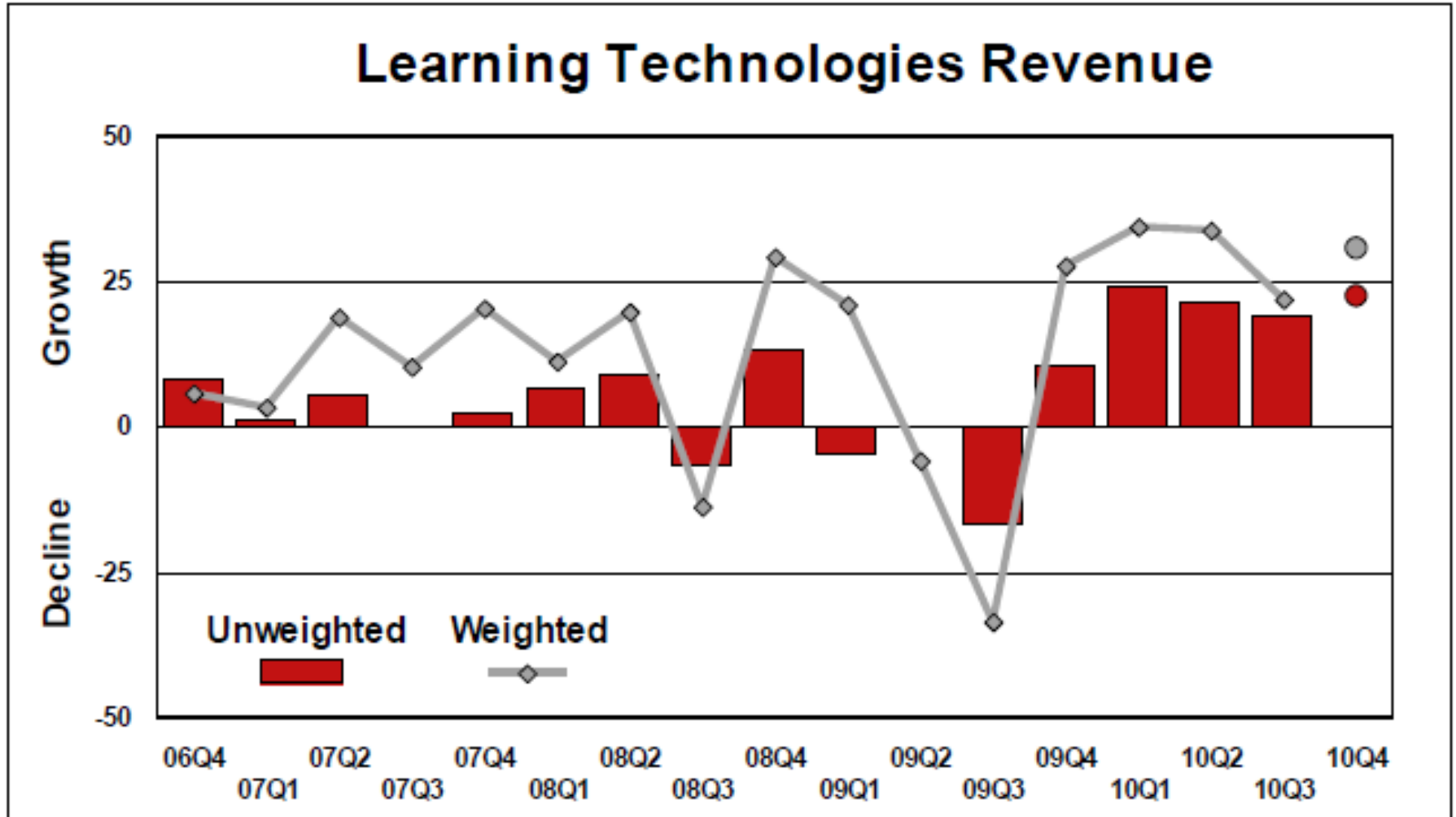


## Total IT Training Revenue









Learning Directors Network UK Training Market Barometer – May 2010

- Virtual classroom and self paced e-learning technologies are biggest area of growth
- 25% of learning focused companies spend 3<sup>rd</sup> budget on learning technologies (10% 2 years ago)
- “71% of employers are using e-learning and 42% increased use of e-learning in 2009 (CIPD, 2009)
- 47% of those who have seen their budget significantly reduced have increased their use of e-learning (LMMatters/TrainingZone, Jun 2009)

Assima  
Training Suite

Assima  
Multilingual Suite

Assima  
Performance Suite

Assima  
Change Management Suite

Assima  
Performance Monitoring

- Major new clients in S2 2010:
  - ▶ Molson Coors
  - ▶ Morgan Stanley
  - ▶ SABMiller
  - ▶ Carlsberg
  - ▶ Renault
  - ▶ Canadian Tire
- Major new OEM partnership signed with Amdocs
- New ATS version launches Jan 2011 + new software suite to be previewed at Learning Tech

- **June 2010** Assima rises in UK Top 50 Training Companies

**Top 50 IT Training**

Rank 2010	Rank 2009	Company	Revenue £m	Change %	Website
5	6	SkillSoft	17.6e	-2	www.skillsort.com
6	7	Parity Training	16.0e	-2	www.paritytraining.com
7	9	ILX Group	14.7e	-4	www.ilxgroup.com
8	11	<b>Assima</b>	13.9	-1	www.assima.net
9	8	Oracle University	13.7	-14	www.oracle.com/uk/education
10	10	Global Knowledge	12.5	-13	www.globalknowledge.co.uk
11	12	ThirdForce	9.0	-20	www.thirdforce.com
12	14	RWD Technologies	8.2e	-20	www.rwd.com

- **Nov 2010** Assima and Corus shortlisted for External Training Project of the Year – 2010 IT Training Awards



**Institute of IT Training**  
External Training Project of  
the Year 2010



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