

UKRAINIAN IT SERVICES AND PRODUCTS EXPORT MARKET' 2003

By the request of the AVentures/TECHINVEST company
(September – October 2003)

AVENTURES

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Market-Visio

ICT Research and Advisory Services

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Gratitude from research organizers

This report has been prepared under the support of the Expert Group gathered within the framework of this research. We would like to sincerely thank all of its members who generously agreed to help us with revision of the content and development questionnaire's structure, were involved in development of the list of companies to be interviewed, and supported the actual interviewing of the research participants and data collection.

The Expert Group has demonstrated the unprecedented in Ukraine model for business research where the members of different (and sometimes competing) companies and organizations were involved in the research process contributing to its objectivity and transparency.

As a result of the Expert Group's efforts, we were able to conduct the first research of Ukrainian IT-industry of such a scale. We are looking forward to further promotion of the research and its participants worldwide.

We would like to thank the following companies and individuals who were committing their time, experience, effort and expertise to the development of this report and any their future efforts in its dissemination and industry promotion:

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We understand the importance of objective and unbiased data representation on Ukrainian IT-industry and hope this type of research will be conducted on regular basis to provide reliable and up-to-date information about Ukrainian IT export industry.

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Introduction

Market-Visio Company conducted the research of current status and tendencies of Ukrainian IT services and products industry in September-October, 2003. The research has been conducted on demand of AVentures/TECHINVEST with an assistance of American Chamber of Commerce in Ukraine and expert group including eSP-Consortium, Miratech, Softline, Softjour, Tessart, Ukrainian Association of Software Developers, Ukrainian Hi-Tech Initiative and Ukrainian Software Consortium.

The present report includes the full results of the research conducted. The report consists of 90 pages. The majority of data is produced as 46 pictures and 4 tables.

Goals and methods of conducting research

The main goal of the research is to provide objective and up-to-date information on volumes, structure, main players and trends of the Ukrainian software development market.

The general estimations and tendencies of the Ukrainian IT services and products export industry as well as characteristics of software development companies were explored. The following sources of data were used:

- Desk Research, including the analysis of publications in specialized editions/periodicals, websites and other open sources of information;
- The data of previous researches conducted by Market-Visio, Gartner and other information;
- Surveys taken by the experts of Ukrainian offshore software development market;
- Personal interviews with representatives of companies involved in IT service and product export market.

The Market-Visio analysts conducted seven in-depth interviews with the market experts and 89 interviews (personal or obtained by Internet-survey) with representatives of the software companies from Kiev, Lvov, Kharkov, Odessa and Dnepropetrovsk.

Structure of the report

Chapter 1 «Analysis of Ukrainian IT services and products export market». This chapter outlines the expert estimations of the Ukrainian IT services and products export market. The expert panel of the research included the CEO and CIO of the largest companies in the Ukrainian IT-market, and also the participants of the project who provided the estimations of market volume, its dynamics and also provided an opinion on market structure and trends.

Chapter 2 «Ukrainian IT services and products exporters' characteristics». This chapter outlines characteristics of the Ukrainian IT services and products exporters. Chapter includes information on companies turnovers, salaries of specialists, companies certifications, provided services and solutions, development tools and platforms.

Chapter 3 «The strategies of Ukrainian exporters of IT services and products». This chapter outlines information on strategies of the Ukrainian exporters of IT services and products in software development and services promotion in the international markets.

Chapter 4 «The successful projects of Ukrainian IT companies». This chapter outlines information about successful projects realized by the Ukrainian exporters of IT services and products for international clients.

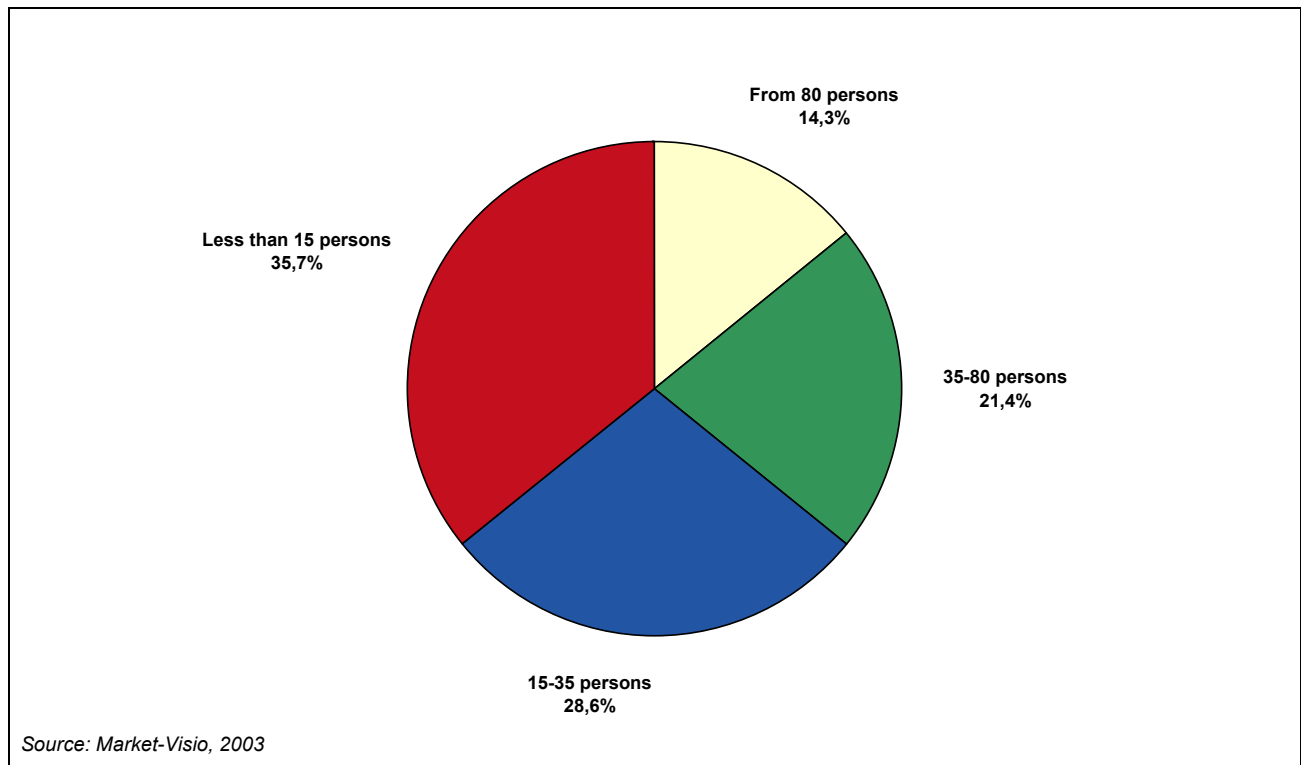
Chapter 5 «Information about participating Ukrainian IT companies». This chapter outlines information about the experts, sponsors of the research, business units and the other research participants.

Structure of respondents

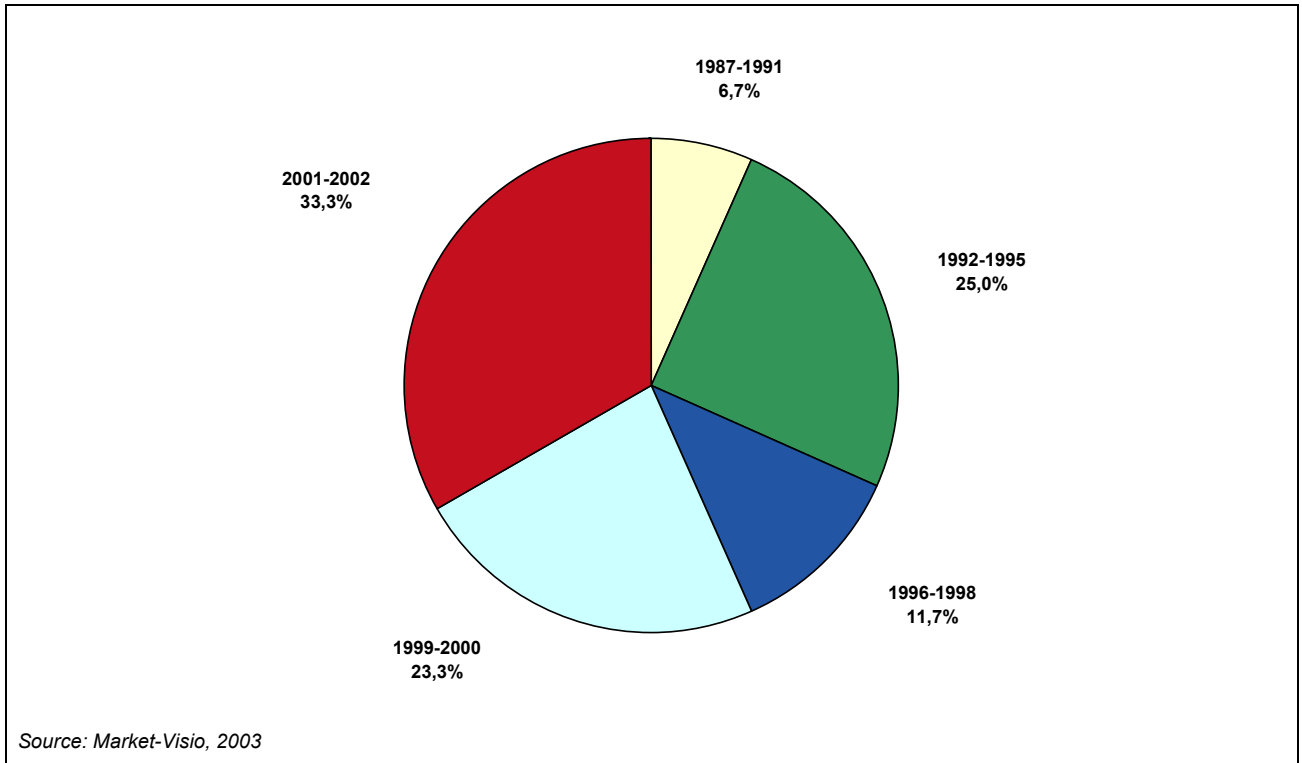
More than 60 Ukrainian IT companies involved in IT services and products export industry have been interviewed. The geographical scope of the research covered the following cities: Kiev, Lvov, Kharkov, Odessa, Sevastopol, Dnepropetrovsk, Chernovtsy, Crimea, Vinnitsa and Kherson.

The IT companies involved in the open market of software development for foreign customers were the subject of the present research.

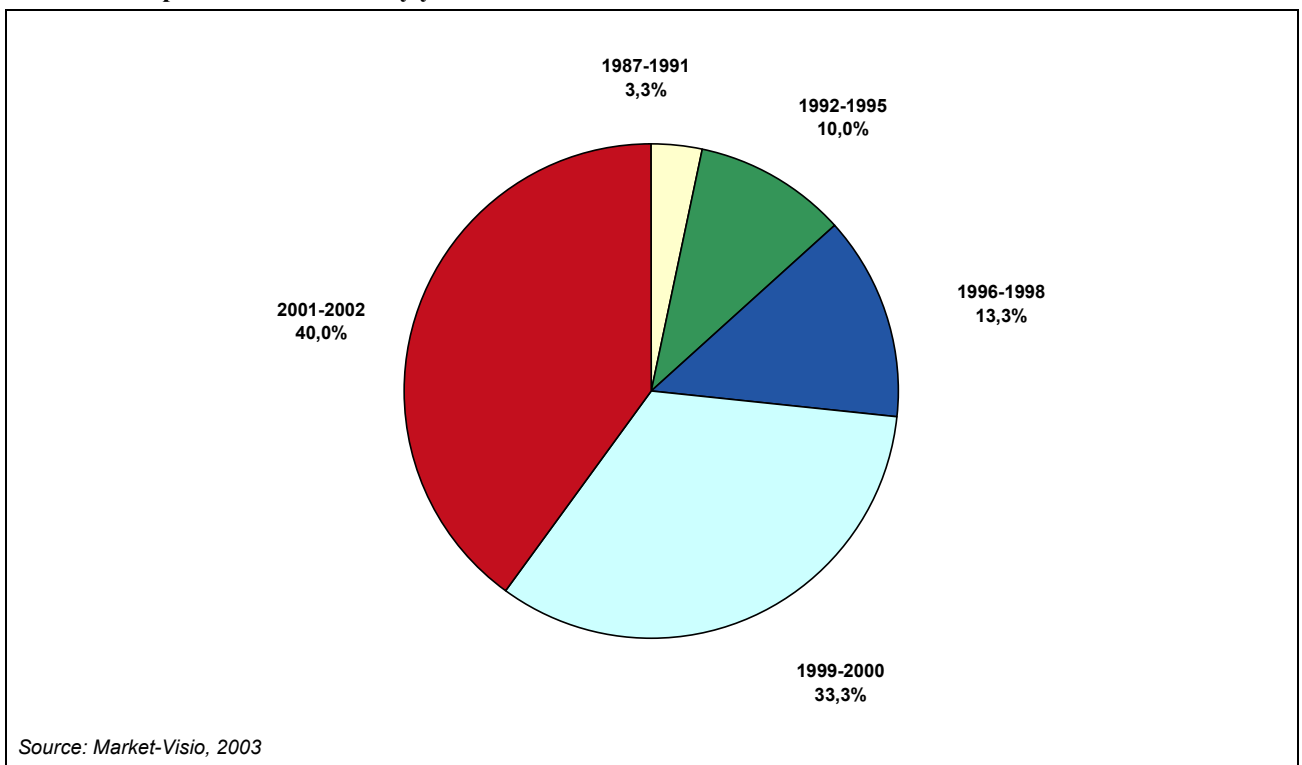
The pictures 1-4 show the structure of the software development companies involved in the research according to the number of their employees, structure of founders, years of foundation and engagement in export business.



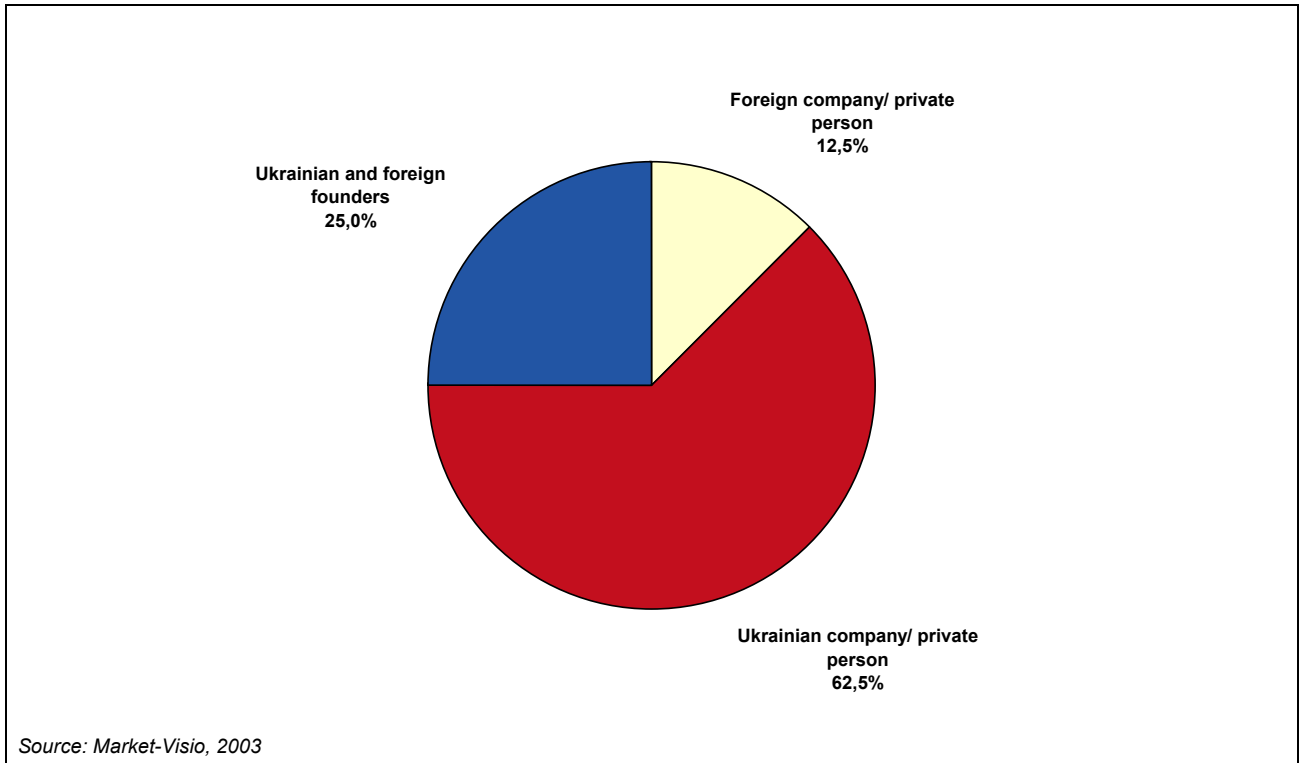
Picture 1. Respondents structure by number of employees



Picture 2. Respondents structure by years of foundation



Picture 3. Respondents structure by year since when they engaged in export business



Picture 4. Respondents structure by founders

Executive Summary

According to the feedback from the market experts and players, the volume of the Ukrainian IT services exports in 2003 will range from 30M USD to 100M USD in revenue. We estimate this amount will be 70M USD. The members of the market are quite optimistic about its growth and are forecasting that Ukrainian IT services and products export revenue will double over the next two years, or 40-50% annually. Increased growth rates (even exceeding the above stated) are feasible provided a) the industry's development will be supported by the Ukrainian government and b) the largest players of the market will consolidate their capacities and efforts for promotion in the foreign markets.

According to our estimations, export revenue comprises about 50% of the entire market for IT services rendered and will increase up to 60% by 2005.

The market is order-oriented, and the product ("off the shelf") model constitutes no more than 10-15%. It is forecasted that its share will grow, and in 2005 will amount up to 35%. It is supposed that the products oriented model will be more competitive business model in the future.

There are around 20-25 public (or known) IT companies in Ukraine, which are mainly located in Kiev, Lvov, Kharkov, and Dnepropetrovsk. Practically speaking, there are no development centers of large corporations in Ukraine. There are around 200 small companies and independent software developers' groups, whose market share ranges from 10% to 65% (according to our estimates amounts to 35%).

The total number of the specialists working in the Ukrainian IT services and products export market in 2003 is estimated to range between 8,000-10,000. Various public information sources provide the numbers ranging from 20,000 to 25,000.

In Ukraine, an average monthly salary of the production personnel involved in IT services and products exports software production ranges from 300 USD to 1,500 USD and the management salaries range from 500 USD to 2,500 USD. It is proved by the data published in the open sources.

The market is still developing rapidly, and the market leaders realize the necessity for consolidation of efforts within Ukraine and cooperation with the developers from Russia and Belarus. The IT-specialist brain drain has nearly ceased, and many of them are coming back to establish their own businesses in Ukraine.

The following large companies involved in offshore software development are leaders in the Ukrainian market: Miratech, Softline, SoftServe, TelesensKSCL Ukraine.

Competition to Ukrainian developers comes from software companies in India, Israel, Russia, Romania, China, and Belarus. But the software exporters from these countries have different specialization. By our opinion the Ukrainian software developers should pay more attention to the high-end software engineering sector where Russian and Romanian developers operates. This segment is more attractive for the Ukrainian exporters of IT services and products due to the similarity of education in the field of programming and mathematics.

Among the clients of the Ukrainian IT companies are companies and organizations from the USA, Canada, Israel, Germany, France, Sweden, Denmark, Norway, Switzerland, Italy, and Spain. Ukrainian companies also receive sub-contracting orders from the Czech Republic and Poland.

Considering the fact that Ukrainian IT-professionals have qualifications similar to Russians, and that their salaries are 30-50% lower, it is not surprising that Russia holds 4th place in the rank of the countries where Ukraine's key software development orders are coming from due to the low international recognition of the Ukrainian IT industry and little on-site presence of software

development companies. Thus Russian clients could avoid communication risks due to similarity of languages and cultures with Ukraine.

It is quite possible that in the nearest future the Ukrainian IT specialists will be enticed into large Russian offshore software development companies. To level this risks Ukrainian companies should organize internal education of young specialists from the universities.

The majority of the experts agree that export-oriented services must be promoted by the companies themselves through the establishment of the representative offices abroad with the assistance of Ukrainian Embassies, as well as through the marketing partners. All the experts note that Ukrainian companies need to cooperate in their marketing and PR efforts with other offshore development companies and take advantage of the Internet for promotion.

It is expected that in the coming years the Ukrainian IT companies will intensify significantly their efforts in promotion of IT services and products in the international markets either by themselves or through different association. Also, a substantial raise of foreign investors' interest to Ukrainian IT companies and their products international commercialization is forecasted.

All experts agree that the political stability of the state and the dynamic growth of the market are positive market factors. The Telecom sector (dedicated lines, mobile communication) is developing. Geographical location of state is also seen as a favorable factor. The neighboring European Union countries and special cooperation status with EU are also considered as favorable factors for Ukrainian IT-export industry growth.

In the opinion of the experts the negative image of the state and the lack of information about the achievements and competitive advantages of the Ukrainian IT-industry exert a negative influence in foreign markets on the development of the IT export industry. There is no State program to support the development of the IT export industry. The lack of the qualified specialists, the inertia of the education system, and the drain of qualified lecturers from Ukrainian educational institutions remain issues.

4. The successful projects of Ukrainian IT companies

This chapter outlines information about successful projects realized by Ukrainian exporters of IT services and products for international clients. The projects were selected by the independent group of the experts after the in depth analysis.

Infopulse

The Client	Kyriba Corporation (www.kyriba.com) , leading provider of distributed cash and treasury management solutions with headquarters in USA and Europe.
Project investors	American Express, Mangrove Capital Partners, GRP Partners, Commerzbank AG
Industry domain	Finance
Expertise domain	Cash, Treasury and Liquidity management
Technologies / tools	J2EE, Oracle, BEA WebLogic, Rational Enterprise Suite, WebGain
Project scale	200+ man-years, geographically distributed team of 100+ persons
Project summary	KyribaTI liquidity management and centralization platform enables real-time access to consolidated cash flow and position data across business units and countries.
Project background	The client required implementation of new integrated suite of on-line financial applications aimed at dramatical enhancing the value of banks' and financial institutions' service offerings including: <ul style="list-style-type: none"> • integration services for heterogeneous financial information • decision-making support tools such as forecasting, reconciliation and cash positioning • complex, highly-customizable inter- and intra-corporates' workflows • access to multiple banking transactions systems
Requirements	<ul style="list-style-type: none"> • 100% J2EE • Scalable cluster-friendly multi-tier architecture • 24x7 availability • Strong security • Up to 1000 simultaneous connections • Support both "thin" and "fat" front-ends • Support of highly-configurable workflows • Web-enable reporting • Multilingual capacities • Customizable look-and-feel
Our role	Provide complete software development lifecycle strictly following the RUP methodology: <ul style="list-style-type: none"> • Develop system requirements with use-case modeling technique; • Define system architecture, perform object-oriented analysis and design (validated by Rational and BEA) • Implement and integrate the system • Test • Deploy pre-production and production platforms
Methodology	Rational Unified Process (RUP): Requirements modeling with use-cases, Architectural analysis, OOA/OOD, Iterative development, Configuration and Change Management, Test, Deployment, Project management. Extreme programming (XP): continuous integration, automated tests, strict coding conventions, refactoring.
Client benefits	The client got and delivered to end-customers fully operational web-enabled cash management platform built on modern technological basis according to the customer's functional and technical requirements. System requirements and architecture are completely documented in accordance with best practices recommended by RUP. The whole project has been performed on time and on budget.

Microcosmic Group

The Client	Nokia (www.nokia.com)
Industry domain	Nokia is the world leader in mobile communications. Backed by its experience, innovation, user-friendliness and secure solutions, the company has become the leading supplier of mobile phones and a leading supplier of mobile, fixed broadband and IP networks
Expertise domain	Nokia Mobile Phones
Technologies	.NET technologies, C#, XML/XSLT, MS SQL Server
Project Summary	Development and deployment of the information system for merchandising automation
Project Background	<p>Nokia mobile phones in Ukraine are sold through a wide retail network consisting of points-of-sale (POS) of various kinds – from exclusive stores to small departments in non-specialized shops. The company has established clear standards, according to which each POS must pass authorization to be allowed to sell Nokia products. Special monitoring is carried out continuously to ensure that no authorized POS compromise the standards.</p> <p>The monitoring assumes regular visits to every authorized POS, during which a designated company representative – merchandiser – conducts a store check. The merchandiser gathers various information as to how the standards are kept, whether new POS materials should be delivered, etc. This information is then sent to the regional office, where it is processed and analyzed.</p>
Requirement	<p>Having several hundreds points-of-sale all over Ukraine and constantly adding new ones, the company had faced a situation where the ever-increasing volume of information has made the existing methods for collecting, processing and analyzing the data too slow and expensive. A modern system was required which would allow fast and reliable data collection and instant analysis.</p> <p>The main goals for deploying a merchandising information system were a) to improve the quality of monitoring by providing tools for instant reporting and analysis and b) to reduce monitoring costs by automating most of the operations involved.</p>
Our role	<p>MicroCosmic Group provided detailed business analysis and all aspects of application development and deployment: requirements analysis and specification, software design, development and testing, personnel training, etc. The solution offered by MicroCosmic Group comprised a multi-user web-based application with centralized data storage. Using web interface, the field merchandisers enter monitoring data collected during regular visits to POS. Each merchandiser has access only to those POS included in his route, while the route is defined by his superior. When the data has been entered, the system can instantly produce analysis in forms of tables and charts. The look and contents of the analysis results can be changed by system administrator with the aid of built-in report wizard.</p> <p>As extra productivity tools, the system includes internal messaging system and critical values monitor. The messaging system saves time and money spent on phone calls and fax messages. The critical values monitor produces alerts when a certain parameter has or has not reached an assigned value: for example, a report has not been submitted by specified date.</p> <p>The system provides great flexibility in defining user roles and access rights, allowing creation of new user roles to meet changing business processes. Web interface resolves the issue of mobility for field merchandisers – they can log in to the system from any place where Internet access is present. Another important benefit of web-enabled application is that the user geography does not matter any more: Nokia European office staff can access the data as fast and easy as a merchandiser in remote Ukrainian town.</p>
Client Benefits	Improved merchandising process, significant cost reduction, faster and more reliable communication between managing office and field workers, increased overall process effectiveness

Reaktivat

The Client	FiSMA UK (www.fisma.org)
Industry domain	B2B platform for establishing cooperation between UK companies and UK investors
Expertise domain	Internet consulting, web design and web development
Technologies	PHP 4.3.4, Expat 0.95, Sablotron 1.0, SSL, MySQL, XML/XSL, Adobe Photoshop 7.0, Macromedia HomeSite 5.2
Project Summary	Web based system to satisfy all demands of new online business in the field of B2B investments
Project Background	After preliminary marketing analysis by Client it became apparent that there are no competitors on UK market in the field of online investment solutions. That was why we were given the task to build the system that would suite all the project's requirements.
Requirement	<ul style="list-style-type: none"> • Provide investment and consulting services only within the bounds of UK • Strictly define and level user groups by the number of factors such as FSA membership • Totally control all users' interactions, registration process and the internal behaviour of the System • Obey all the legal UK issues without detriment to functionality
Our role	<ul style="list-style-type: none"> • Logotype, company corporate style and web site design • Internal system of documents circulation and communication between users – Administrator is able to define types of possible documents and access level for each user group; Users download and read documents appropriate to their status and permission level. The communication between Investor and Company occurs through internal messaging system with restrictions applied for each user group. • Sophisticated business logic management system that basically includes: <ul style="list-style-type: none"> ○ Management of the registration process for each user group with accurate tuning of online payment options. The following tools are available for Administrator: <ul style="list-style-type: none"> ▪ Management of general registration settings that includes: definition of key data required for successful registration (country, age, FSA membership, number of retries before user is blocked, etc); management of special questionnaire that serves as success criteria for Knowledgeable Investor registration – Administrator defines the list of questions, number of answers for each question, relations between correct/incorrect answer and next question, number of points for each answer, amount of points to gain for successful registration, etc ▪ Payment options. Administrator is able to instruct the system how to respond to the particular message from Payment System. Basically for each code returned from the payment gateway it is possible to assign the scheme of response: Decline registration and delete all temporary user data; Decline registration and block all further registration attempts for X days, Accept registration with limited access and send reminder in X days; Accept registration and move temporary user data to the general database. ▪ Price policy management – Administrator creates elemental rules and defines the set of these rules to develop individual price policy for each user group ○ Users' management and control of all interactions between Investor and Company. This is implemented by: <ul style="list-style-type: none"> ▪ Leveling users access to the particular document type ▪ Ability to define the penalty for terms and conditions violation ▪ Documents processing – the document appears on the site only being converted to PDF and authorized by Administrator ○ Financial tracking system. The system tracks any payment by User, price policy and time period.
Client Benefits	<ul style="list-style-type: none"> • Client got all the necessary tools to handle online business in the field of B2B investments • Client makes no efforts to maintain and sustain the system after initial setup • There are already couple dozens of users with ready contracts before marketing campaign start

Volia Software (Softline)

The Client	Ingersoll-Rand Int. Company (www.irco.com) – A Fortune 500 company leading innovation and solutions for the major global markets of Security and Safety, Climate Control, Industrial Solutions and Infrastructure
Industry Domain	Production and Distribution of variety of equipment
Expertise Domain	Logistic System IDS (International Distribution System)
Technologies	Back end on Oracle RDBMS Business layer on EJBs with BEA WebLogic Application server Presentation layer on JSP/Servlets with BEA WebLogic Web server Oracle Reports server for scheduling reporting routings and publishing reports
Project Summary	Existing mainframe-based order processing system needed to be replaced with a solution that ensures changing business needs are followed in a faster, flexible and cost-effective way. The new system would support significantly more connected users, increased availability and reliability requirements and run on two mirrored nodes. A new Internet-based system was developed on J2EE platform using proven practices of legacy system analysis and re-engineering, cutting-edge software development technologies and project management approaches. Three-tiered (N-tiered) architecture was used to make the new application robust, secure and scalable.
Project Background	Legacy system has been working and being modified for more than 20 years. As a result, it became not manageable and not changeable. Furthermore, there was no any documentation, so, complete business process analysis and reengineering of the old system was necessary.
Requirements	Complete legacy system's functionality replacement, ability to work with other Customer's systems. Moreover, both new and old systems had to work in parallel mode for smooth transition.
Our role	Project Management and development (full circle)
Client Benefits	The client gained much from cooperation with Softline and is committed to a long-term relationship. The new system brought the company to the leading edge in order processing systems thus improving the image of the company, attracting new clients and streamlining interactions with customers and partners. New technologies involved in the project increased productivity of IT department consequently minimizing time-to-market for improvements of the system required by customers and partners as well as a changing business environment.

Source Valley

The Client	Bonus Technology Inc (www.bonustec.net), USA – official vendor of Telcordia Technologies
Industry domain	Telecommunications
Expertise Domain	Source Valley™ is a dynamically growing IT company delivering the premium-quality QA/Testing services for businesses worldwide. Our mission is to perform extensive in-depth testing of solutions and applications drastically improving their quality. Driven by our solid expertise in QA/Testing, we provide our existing customers with Software Development, Maintenance and Technical Support services based on the knowledge of the product we test. Being an official representative of Bonus Technology in Ukraine, we participate in a joint long-term contract with Telcordia Technologies, one of the biggest U.S. telecommunications software developing companies. Source Valley provides development, testing, maintenance and support for the number of Telcordia's integrated systems.
Technologies	HP-UX/Windows, J2EE, C++, CORBA/XML, JMS Bus
Project Summary	<p>One of Telcordia's products is integrated tool to track and monitor entire telecommunication network, seamlessly. Telcordia's management chose the outsourcing model striving to access highly qualified Resources while benefiting from cost reduction at the same time.</p> <p>At the time Source Valley offered exactly that kind of services. All organizational Issues were resolved in a timely manner and pilot project started 1 month from our first contact. By that time we've set up the entire infrastructure, hired additional resources with the relevant experience, conducted online trainings, prepared the test environment, developed local procedures etc.</p> <p>Pilot project focused on functional and configuration testing. It lasted 3 month and was highly successful. Offshore team managed to achieve the same performance as the team of testers on-site. Dynamic testing strategy, aggressive risk management and effective communication were key factors of our success.</p>
Project Background	Improving the quality of the Product by allocating additional resources at the Multi-Unit phase of testing in order to stabilize the software by the time it enters the Product Test. This would result in extra time available for the in-depth testing such as performance tuning and optimization.
Requirement	Observe Telcordia quality methods of operations (QMO) software system testing standards and practices as they apply to the Product. Comply with Bonus and/or Telcordia computer security and other security procedures; provide safety of proprietary confidential information.
Our role	Source Valley delivers the full-cycle of QA/Testing services including Requirements Analysis, Test Plans and Test Cases development, Configuration, Functional and Regression as well as Performance testing.
Client Benefits	The quality of testing has improved - Product Test reported increase from 60% to 80% of PFT (passed first time) test cases rate. Source Valley has demonstrated total 62% improvement in cost-efficiency.

TeT

Client	USA software development company
Expertise domain	Requirements analysis and specification, software design, development and testing, sustaining engineering
Technologies	MS Visual Basic 6.0, MS SQL Server 7.0/2000, PVCS, Rational Rose 2000
Project summary	The product provides PC tools to analyze corporate IT asset management data collected from mainframe and Unix systems. Although concept and architecture were developed by the client, TeT implemented and continues to implement major critical components of the system including data import and export (CSV, desktop databases, MS Excel, XML), reporting tools, GUI, charting, data retrieval and processing, internationalization, multi-user support, etc. The project can be considered as a perfect example of a team overseas work provided by TeT
Client Benefits	Dramatic cost savings, stable predictable results, better product's quality

Client	USA software development company
Expertise domain	Turn-key application development – from requirements gathering to deployment
Technologies used	Palm OS ® platform, MS Visual C++, Metrowerks CodeWarrior, M-language (Cache DBMS)
Project summary	A Palm OS ® handheld interface to a medical billing system. This software package allows doctors to review and input information when they are away from the office, primarily during hospital rounds, and gives access to the most of patient record, appointments and schedule data. The package is comprised by 3 levels (database procedures, desktop module and Palm application) connected by custom BXXP protocol implementation based on XML specification. Custom UI controls were used at Palm level to make GUI more user-friendly
Client Benefits	A new modern mobile product to interface popular billing system

Eclipse SP

The Client	TechDataSolutions Inc. (www.techdatasolutions.com), USA
Industry domain	Client's relationship management
Expertise Domain	Web development
Technologies	ASP/MS Access
Project Summary	<p>Detailed description could be found at http://www.clientworkz.com/247.htm</p> <p>The 24/7 Client Feedback Program consists of a customized Internet portal for company clients to:</p> <ul style="list-style-type: none"> • Provide compliments on your performance (compliment box) • Provide complaints and request enhanced service (complaint box) • Participate in a more detailed feedback survey (approach that provides very actionable information and valuable insights)
Project Background	Project has been developed by Eclipse SP LLC for its partner – TechDataSolutions Inc. (USA)
Requirement	There was a task to develop already failed project in strict terms and with high quality
Our role	We have successfully accomplished defined requirements and delivered quality software in agreed terms
Client Benefits	<p>Client has received expected software for expected budget and a free warranty support for a one year period.</p> <p>During the project client receives weekly reporting from the assigned project manager.</p> <p>During iterative deliverables, client had a chance to review delivered software, try it from the very beginning and apply his comments</p>

ILS-Ukraine

The Client	National Land Agency (NLA) , Kingston, Jamaica
Industry domain	Governmental
Expertise Domain	Land Registration Solutions, TORENS based, Name of system is ILS Land Registration System 3.0 (ILS LRS 3.0)
Technologies	Multi-layered architecture and with own application server use, integration with 3d parties applications, which are in use in NLA: Based on the following software technologies: Windows 2000/XP, Microsoft SQL Server 2000, .NET 1.1, Delphi 7.0, C#, ArcGIS, ActiveX, ADO, HTML/DHTML, Crystal Reports
Project Summary	TORENS based land registration system, system automates activity of all department of NLA, configurable workflows customizable for each registration transaction type, configurable access rights, rich set of reports providing information on land registry, staff productivity, turnaround time for registration transactions, electronic Certificate of Title, integration with document scanning system containing about 1 million scanned documents, integration with GIS system containing cadastre information for whole Jamaica – about 650 thousand land parcels. Project was in cooperation with following companies: <ul style="list-style-type: none"> • Fujitsu, supplier of H/W solution and • NovaLIS, supplier of GIS solution, ESRI technology based. Number of users of the system is 200. Project has been funded by World Bank at a cost of USD 1.24 million. References: <ul style="list-style-type: none"> • http://www.nla.gov.jm/nla_services.html
Project Background	Latest developments and installations in this direction besides ILS LRS for NLA, Jamaica are: <ul style="list-style-type: none"> • ILS LRS 2.0, Republic of Armenia, year 2001, customer – State Land Cadastral Committee of Republic of Armenia, installation basis – 36 regional land offices; • ILS LRS 2.1, Republic of Uzbekistan, year 2002, customer – Main Administration of Geodesy, Mapping and State Cadastre, installation basis – 10 regional land offices.
Requirement	ILS requires the following to be provided by customer: <ul style="list-style-type: none"> • Initial information from customer: RFP, scope or work, brief explanation. • Access to current information systems in use; • Information on land legislation – state acts, resolutions, decrees; • Access to line staff on assessment phase; • Access to Registrars and Lowerers on assessment stage; • Constant communication to customer on customization phase.
Our role	As a rule, deployment and maintenance for ILS LRS includes the following activities: <ul style="list-style-type: none"> • Business analysis, including analysis of land legislation, current registration workflows, organization chart with staff roles, current reporting procedures and forms, systems in use; • Assessment Report – result of business analysis with our recommendations on system architecture, workflow changes, reorganizations; • System customization, which includes definition of objects/attributes, workflows configuration, reports creation; • Language localization (skill – Russian, Ukrainian, Armenian, Uzbek, English) • Development of custom modules and subsystems specific for customer; • Integration to existing system; • Data conversion and load from systems to be stopped; • Staff training and User Documentation; • Maintenance and remote support if remote access provided by customer.
Client Benefits	<ul style="list-style-type: none"> • Reducing the time for transactions a times; • United registry of all land information on Certificates of Title, owners, real estate, encumbrances; • Improved staff management; • Improved reporting.

Kit-Group

Клидент	Affinity Marketing (www.affinity-marketing.com) W288 N3442 Lost Creek Ct., Pewaukee, WI 53072, 1-866-493-6258
Industry domain	Auto sales e-marketing, e-CRM
Technologies	ASP.NET, MSSQL
Project Summary	This application helps Affinity Marketing to bring new solutions for web enabled CRM and Internet marketing. It enhances the marketing efforts for auto sales by increasing CSI scores, harvesting leads, and increased sales. Features: Web enabled Email harvesting Email newsletter creator Email campaigns delivery Survey creation, delivery and tracking Flexible reporting
Project Background	This is an ongoing project where we provide enhancements, support, and software development as required by the client
Requirement	Provide a solution that allows our client to offer email marketing services to increase sales and collect valuable data for their clients
Our role	We designed, developed, provide support, and make recommendations to our client Affinity Marketing for their IT needs. This includes consultation, software development, testing, hosting, and support services
Client Benefits	The client has benefited from our web based application expertise and low cost. The application we designed has drastically increased sales and provides invaluable data for the users of this application

MBS

The Client	Xplorex – Outdoor Adventure Newswire 3176 West 11 th . Ave. Vancouver, BC, V6K 2M7 Canada tel.: (604) 805-5872 http://www.xplorex.com
Expertise Domain	Xplorex provides the most technologically advanced platform for on-line business and presence
Technologies	Language: Perl, PHP, Java 2 SDK 1.3.1, JSP Engine: TomCat 3.2.1, HTML, XML, Flash, Photoshop, Corel Database: MySQL Web Servers: Apache, IIS, PWS Mail Server: qmail 1.03 + vpopmail for virtual domain and users management Wireless: WML, SMS etc OS: Windows 95/98/NT4/2000, Linux RedHat, FreeBSD, SUN OS
Project Summary	Started in 2000 as development of www.xplorex.com web site, it has later transformed into development of mysitetool.com – web based system for instant creation of fully - featured web sites, featuring total customization and control
Project Background	This is an ongoing project where we provide enhancements, support, and software development as required by the client
Requirement	Provide the following solutions: Web / network applications, Web portals (Xplorex), Web shop software, Creative design, Text/voice chat applications
Our role	We designed, developed, provide support, and make recommendations to our client.
Client Benefits	With Xplorex, you get more than just a superior website - you also learn best Internet practices that help you make the biggest possible impact in your market. With Xplorex, it's easy to transform your ideas into action with the most useful marketing tool ever invented. The Benefits of Xplorex System: <ul style="list-style-type: none"> • Dramatically Reduces Costs • Reduces Time to Market • Run Online Business Anywhere • Increases Productivity • Saves Your Money • Access the Global Market • Reduces the cost of customer support • Allows you to compete with the best • Allows you to claim the highest rankings on the search engines

Miratech

The Client	Genesys Telecommunications Laboratories (www.genesyslab.com), USA
Industry domain	Telecommunications
Technologies	Tools and technologies: Java, C++, SQL, COM+, SOAP, XML, RPC, TCP/IP, C# Platforms: MS Windows NT-XP, Sun Solaris, HP-UNIX, AIX, MS SQL Server 7.0, DB/2, ORACLE, SAP, MS CRM, Genesys Framework, . Net
Project Summary	<p>Development of software applications for various Genesys product lines. Miratech was involved in following activities:</p> <ol style="list-style-type: none"> 1. Requirement Specification 2. Architecture and Design 3. Graphical Design 4. Coding and Unit testing 5. Functional and System Testing 6. Project Management <p>Short summaries of the project Miratech runs for Genesys now:</p> <p>WorkForce Management: http://www.genesyslab.com/contact_center/products/workforce_management.asp Miratech is fully responsible for development of the front-end part of the solution. Current stage of the project takes about 10 stuff years</p> <p>GPlus adapters: http://www.genesyslab.com/contact_center/products/gplus.asp Miratech is responsible for development Currently Miratech allocated approximately 5 staff year for development of this set of projects</p> <p>IPMX: Miratech is fully responsible for producing and support of the VoIP components of the Genesys suit. Miratech allocated approximately 7 staff years for this project.</p> <p>AIL Services: Miratech took responsibility for development of the protocol intended to link Genesys framework Java services and third party .Net clients. Miratech allocated approximately 3 staff years for this project.</p> <p>MS CRM Adaptor: This project is intended to produce a special adaptor between the Genesys framework components and MS CRM Server. Miratech allocated approximately 2 staff years for this project.</p> <p>The software development team allocated for Genesys is about 50 persons. It is being doubled each year.</p>
Project Background	Optimization of the client's expenses and development of its capacity
Our role	Software development, IT services and support, and 2-nd and 3-d level of Product support Software development team: 50 persons 2-nd and 3-rd level support team: 8 persons IT support team: 4 persons
Client Benefits	Customer optimized its expenses, increased its productivity

Novatek

The Client	A leading U.S. airline
Industry domain	Air transportation
Technologies	OS: HP-UX Database: IBM DB2 Developer tools and languages: C++, ACE, IBM MQ Series, Rogue Wave Tools, SQL, IBM db2connect, ERWin, Rational Rose, CVS, MS-VSS
Project Summary	Development of the Billing and Settlement Plan system based on the legacy application logic
Project Background	<p>The Client receives ticket sales information for travel agency sales via Billing and Settlement Plan (BSP) from 70+ countries in the Hand Off Tape (HOT) format and Airline Settlement Plan (ASP) from agencies in the United States in the Carrier Account Tape (CAT) format. The HOT and CAT data contains all Agents' (automated and manual) transactions effected exclusively on behalf of one Ticketing Airline during one or more reporting periods. Further, the data contains other accountable documents concerning such transactions and those of that Airline relating to prior reporting periods.</p> <p>The original application cannot be used for processing of BSP data due to the performance, maintainability, and modification of BSP format.</p>
Requirement	Improve overall system performance to perform daily operations in time. Add some new functionality with the purpose to support last changes in the client's business process. Update interfaces to external systems which were changed last time. Use MQ Series for event-based communications.
Our role	<p>After business analysis of currently installed system, identification of weak points, mining of business rules from source codes and validation, new system has been developed. Due to the completely new architecture, which is optimized for BSP data processing; avoiding of internal persistence and mixture of several technology new system has meet expectations of the Customer.</p> <p>The application was completely integrated into environment of the Customer in accordance with standards and policies of the Customer. The system works 24/7. It waits for new files. As soon new file appears, the system processes data, applies business rules, stores information into the BSP data persistence and sends events to other installed systems.</p> <p>Significant limitations of the project were strong polices of the Client. Our team had to study standard process for software development, and timely integrate the process in our site. Standards and policies include processes, documentation, coding standards, mandatory integration with reusable modules, etc. Due to the experience of the team, internal development process has been adopted timely. The project has been completed successfully.</p>
Client Benefits	<ul style="list-style-type: none"> • The BSP data is processed by the Customer • Appearing of new data and modification of BSP data storage is evented, and can be monitored by any other application • New optimized architecture allowed to increase the performance for about 5 times • It is possible to support the system. New code is well-structured and well-commented

SoftPro

The Client	Seehafen Transportkontor Gildemeister GmbH, Germany
Industry domain	Transport company
Expertise Domain	Transport logistic
Technologies	Advantage Database Server, Xbase++, WEB Application Adapter, MS Visual C++
Project Summary	The aim of the project is to increase the efficiency of company daily functions and to develop the corporate desktop/Internet application to manage consignment delivery worldwide
Project Background	The project consists of three parallel action streams: workplaces for managers of import department, workplaces for managers of warehouse department, and worldwide agent's access to database via Internet. The second streams are solved in two technologies – as desktop and as Internet application for remote warehouses
Requirement	Integration with Tobit Infocenter (Tobit SoftWare, Germany) as main mail & fax application, integration MS Map Point to optimize cargo delivery streams in whole Germany and German-speaking part of Europe. Data interchanging with CargoSmart and Deutsche Paket Dienst databases
Our role	The main developer of desktop & Internet (via WEB Application Adapter) application
Client Benefits	Increasing the efficiency of company daily functions, acceleration of information processing, optimization of cargo delivery expenses, quick connection with worldwide agents

Telesens

The Client	Deutsche Telekom AG, sub-unit T-Online (www.telekom.de) - the leading telecom operator and Internet Service Provider in Germany
Project investors	Deutsche Telekom AG
Industry domain	Telecommunications
Expertise domain	Billing for Internet services and domain hosting Billing for broadband connections (ATM)
Technologies / tools	Distributed client-server architecture, server part on the Sparc SUN Solaris platform (C++, Sun Forte), client for Windows (C++, Borland C++ Builder), RDBMS Oracle, CASE Tools: Rational Enterprise Suite, Sybase Data Architect
Project scale	1200+ man-month, distributed team (Cologne, Kharkov, Riga) consisted of 40+ persons. Work performed in Kharkov was about 3500+ man-month
Project summary	In 1999, due to introduction of new services (Broadband ATM) and continuous upsurge of internet services (ISP and Domain Hosting), Deutsche Telekom AG realized the need of introducing new generation billing software with the following functionality: <ul style="list-style-type: none"> • flexible customization of tariff models to changes of business rules • processing of huge volumes of data in conformity with the 24*7 scheme • data exchange with other information systems of DTAG
Project background	The orders for new billing solutions were placed with Telesens AG Group, where at that time Telesens Ukraine was one of the divisions
Requirements	The management of Telesens AG Group decided to run parallel development of full-scale solutions (on Sparc SUN Solaris platform) at Cologne development center and interim solutions (on WIntel platform) at Kharkov development center. This approach allowed deploying the first versions of billing systems as early as six months after the beginning of development, and clarify the requirements to the core systems in the course of running the interim solutions
Our role	During its cooperation with DTAG, Telesens Ukraine performed the following works: <ul style="list-style-type: none"> • Development and introduction of KDVpre for ATM-billing. The system was in commercial operation from September of 1999 to September of 2000, after that it was replaced with full-scale KDV-ATM solution. • Development and introduction of a billing system for IP-traffic of KDVticar. Commercial operation of the system began in 2000 and it turned out to be so successful that DTAG decided to continue developing the existing system. The last version of KDVticar 4.6.4 is in commercial operation since 2002. • After the Cologne office was shut down in October of 2001, Telesens Ukraine took over all works related to maintenance and further development of KDV-ATM system
Client benefits	In his report about projects performed by Telesens Ukraine for DTAG, Mr. Ulrich Hoffmann , in particular, emphasized the high quality of works and prompt deliveries, as well as efficient communications with the Kharkov team and lack of language barriers

Tessart

The Client	Oregon Department of Corrections, Salem, Oregon (ODOC).
Industry domain	Government
Expertise Domain	Legacy Applications Services
Technologies	AS/400, OS/400, COBOL, RPG, CL
Project Summary	Extensive 1.5 year-long software re-engineering (Y2K renovation) effort for Government organization. Workefforts: 160+ man*month.
Project Background	Oregon Dep-t of Corrections (ODOC) has got rather complex information system hosted on multiple AS/400 machines. The legacy software portfolio (10 MLOC+) written in such languages as COBOL/400, RPG, CL was considered as vulnerable to Year-2000 problem. Total team involved included 9 people, 2 of them on-site in Salem, OR. The core team was working in Kyiv, Ukraine using local AS/400 system for renovation and unit-test and using remote access to the Client's QA environment.
Requirement	It was required to <ul style="list-style-type: none"> - define the scope of Y2K remediation efforts; - schedule remediation efforts keeping minimum software "freezing" downtime and taking into account interdependence between legacy applications; - identify the best remediation strategy; design and finally apply remediation software patches; - make patched application to correctly pass unit-test, on-site integration- and finally acceptance test.
Our role	Final contractor
Client Benefits	Client benefited from combination of low-cost high-quality renovation services and extensive legacy language expertise.

Outsourcing Ukraine

The Client	Proactive International LLC (Lynn Fredricks) 6107, SW Murray Blvd #151, Beaverton, OR 97008, USA +1-503-520-0191, +1-503-643-9877
Industry domain	3D modelling
Expertise Domain	3D file conversion / management software
Technologies	WxWindows C++ SDK, OpenGL, XML, Quesa.
Project Summary	The business goal was to build a new application for 3D artists, animators, multimedia developers, media production houses and everyone else who wants to collect, manage and convert 3D objects.
Project Background	<p>The major challenge was to design a modular cross-platform software architecture supporting third-party plug-ins. To accomplish this goal the wxWindows C++ SDK was selected. The software architecture was designed to be effectively ported to other platforms (Macintosh and Linux). OpenGL technology was selected to provide object preview functionality with texture and light support, as well as zoom/rotate/revolve functions and wireframe/solid modes.</p> <p>One of the most important Meshbox features is the object conversion to and from the most popular 3D file formats: 3D Studio MAX (3DS), LightWave (LWO), TrueSpace (COB), Apple Computer's 3DMF, Expression Tools Shade (SHD) and WaveFront OBJ. It also supports Shockwave 3D (W3D) and Viewpoint (VET) 3D web formats for export. To provide this complex functionality an internal 3D format was designed and implemented. This format supports vertices, meshes, textures, materials, lights, cameras to enable seamless conversion between different 3D formats.</p> <p>A robust database back-end is based on the Paradigma Software Valentina DB engine. This allows 3D objects to be stored in collections and include both keyword and description based searches. Combined with conversion functions, designers can transfer or batch convert volumes of 3D objects into Collections.</p> <p>XML format was selected to keep the vital information about 3D objects, Projects and Collections for increased productivity. Users can also assign keywords and descriptions to objects, Collections and Projects themselves so they can be easily searched and found.</p> <p>Further development plans include porting the software to other platforms (Macintosh and Linux) and adding more 3D file formats.</p>
Requirement	Project Management (Collections and Projects); Production Management (collect, search, sort and "batch manage"); OpenGL Preview (zoom, rotate, revolve); Object Conversion (3DS, .3DMF, .OBJ, .SHD, .LWO, .COB, .W3D, .VET); Export to the Web (Macromedia Shockwave 3D and Viewpoint Corporation's VET); Batch Conversion; Find and Sort.
Our role	Outsourcing Ukraine provided the complete development cycle from initial business logic assessment and solution design to testing and deployment. Total time spent: 4,000 hours.
Client Benefits	The software allows users to convert their 3D objects to and from the most popular 3D file formats. Meshbox 1.0 is the only product on the market allowing users to "batch manage" their 3D objects in the production mode.

Softwarium

The Client	Vioworks, Inc. (www.vioworks.com), USA
Industry domain	Enterprise Groupware
Expertise Domain	Client/Server development; Multimedia
Technologies	Win32 API; TCP/IP; ASP.NET; Oracle; Multimedia
Project Summary	Softwarium, offshore software development service provider, was selected by the Vioworks, Inc. to build the new generation virtual meeting and collaboration product for the company.
Project Background	<p>The objective was to bring to market product with unique technology that allows meeting participants to use their computers as a virtual meeting room and instantly connect and collaborate on any Internet connected PC leveraging video, Voice over IP and instant messaging communication technologies.</p> <p>First version of the product named VioMeeting was successfully launched and is accessible for the public use at: http://www.viomeeting.com. It is designed to provide seamless collaboration over the Internet and private IP networks. Unique technology base is built around the concept of real-time sharing of PC-based content (Microsoft PowerPoint, Microsoft Word, Microsoft Excel, Software Demonstrations, custom applications, etc.), Voice over IP, and Video. These capabilities are delivered through a secure, reliable, and firewall friendly infrastructure designed to easily integrate into any environment. VioMeeting depends on a standard IP network for all data transmission. This makes the technology compatible with both the public Internet and private networks. VioMeeting is currently supported on all Windows platforms starting with Windows 95. Macintosh and PocketPC support is currently under development and will be available in the future.</p> <p>The product was designed and developed from the ground up by the Softwarium team of architects, designers and developers using pure offshore development model with project manager operating offsite.</p>
Requirement	To design and build virtual meeting and collaboration product to be used in the company and its clients. Product should support realtime desktop sharing, application sharing, audio and video communication, chat. Product should be easy to use and work in any Internet or Intranet configurations (through proxy, NAT, firewall, etc).
Our role	Softwarium was performing all project phases beginning from requirements analysis and design to testing and deployment.
Client Benefits	Softwarium was able to design, build and deliver high quality collaboration product at costs much lower than Vioworks, Inc. internal development team.

5. Information about participating Ukrainian IT companies

This chapter outlines information about sponsors of the research, business units and other research participants.

5.1. Sponsors and business units



Company name	Infopulse Ukraine
Web-site:	www.infopulse.kiev.ua
E-mail:	info@infopulse.kiev.ua
Address:	Ukraine, Kiev, 24 Polevaya str.
Telephone/fax:	(044) 495-57-23/495-57-24
Company director	Alexey Sigov / sigov@infopulse.kiev.ua
Offshore software development director	Andrey Anissimov / Andrey.Anissimov@infopulse.kiev.ua
Year of foundation, the year offshore development was started	1999, 1999
Certification	2004 planned – standard ISO 9001:2000
Founders	Ukrainian and foreign founders (Netherlands)
Business model	Custom-built software development
Staff number	Operative personnel – 95 persons (Project Managers – 12)
Services	Kind of operations performed: Custom-built software, reengineering, migration/porting, software testing and QA, software support, maintenance servicing, applications integration. Specialization: Financial applications, Electronic Commerce, E-procurement, SCM solutions, Back Office Applications, Front Office Applications, Web Development, Networking and Communications, Telecom applications, Embedded software solutions, Wireless solutions, Enterprise Application Integration.
Development tools used	<p>Focused on Architecture solution .NET, EJB and COM/DCOM/COM+, CORBA, RMI, SOAP, XML/XSL technologies.</p> <p>Program languages and RAD: C/C++/STL, C++/MFC/ATL, C#, Visual Studio (Visual C++, Visual Basic, etc.), VBScript, Perl, Java, JavaScript, Delphi ASP, JSP, HTML, DHTML, WML Script, WML, SQL, Apache, Visual Age for Java 3.6, Visual Age for C++ (OS/2 and Windows platforms), Visual Cafe, JBuilder 4.0, JDeveloper (3.2), DreamWeaver UltraDev Studio 4, ColdFusion Studio 5.2, InstallShield Professional (5.3, 6.0), Windows Installer 1.5, PowerDesigner 7.5, WindRiver Tornado 2.0, WAP, TTML</p> <p>MS technologies: BizTalk Server 2000, Commerce Server 2000, Internet Information Server 4.0 (5.0).</p> <p>RADs: IBM (Rational), Microsoft</p> <p>Methodologies: RUP, MSF</p> <p>OS, platforms: Windows 3.x/9x/2000/NT, OS/2, *NIX family (AIX, Solaris, Linux, SCO Unix), VxWorks, Mainframe, Portable Platform</p> <p>Oracle technologies: Oracle Developer/2000, Oracle Designer/2000, WebDB.</p> <p>Application servers: Oracle iAS 9i, Oracle iAS Wireless Edition 9i, IBM WebSphere, BEA WebLogic, Microsoft's MTS.</p> <p>DBMS: Oracle, MS SQL Server, Informix, DB2, Versant.</p>
Main clients	France, Netherlands, Belgium, USA, Germany
Development priorities	Marketing and PR for foreign customers, ISO and CMM certification



Company name	Internet Consulting & Communications Ltd (ICC)
Web-site:	www.icc.com.ua
E-mail:	office@icc.com.ua
Mail address	03126, P.O. Box 618/8, 03126, Kiev, Ukraine
Telephone/fax:	+38044 490-81-60 / 490-8162
Offshore software development director	Khodischenko Eugen / khodischenko@softpress.com.ua
Year of foundation, the year offshore development was started	2000, 2000
Founders	SoftPress Publishing House
Business model	Creation and development of Internet projects
Staff number	Staff – 7 persons (project managers – 2) Management – 1
Services	<ul style="list-style-type: none"> • Consulting services, web strategy development. • Web design, programming, project quality assurance. • Creation and development of large content projects.
Development tools used	Languages: ++, Java, PHP, Perl, Delphi, ASP, Visual Basic, Visual C Platforms: Linux, Windows NT/2000 Data bases: MySQL, MSSQL, Sybase Adaptive Server Enterprise
Main clients	SoftPress Publishing House, Olympus Optical Co. (Europa) GmbH, Ukrainian customers 2001 – USA



Company name	Microcosmic Group
Web-сайт	www.mcgua.com
E-mail	info@mcgua.com
Address:	10 Starokyivska St., Kyiv 04116, Ukraine
Telephon/fax	+380 (44) 236-2301, 236-2146
Company director	Denys Kotseba, President / kdl@mcgua.com
Offshore software development director	Denys Kotseba / kdl@mcgua.com
Year of foundation, the year offshore development was started	2000, 2000
Certification	No (SEI CMM Level 3 – compatible process)
Founders	Ukrainian and foreign founders (Korea)
Business model	Custom software development, IT-consulting
Staff number	Staff – 17 persons
Services	Services: Application development, application integration, web-enabling Specialization: Electronic Commerce, Groupware, Intranet and Electronic Workplace, E-learning
Development tools used	<p>Platforms:</p> <ul style="list-style-type: none"> • MS Windows 9x/NT/XP/ME/2000/2003 • .NET • Pocket PC 2002/2003 • PalmOS • UNIX, Linux <p>Languages and Technologies:</p> <ul style="list-style-type: none"> • C/C++/C# • Visual Basic, VB.NET • Embedded Visual C++/Visual Basic • XML, XSLT • ASP, ASP.NET • PHP • Perl • HTML, JavaScript <p>DBMS</p> <ul style="list-style-type: none"> • MS SQL Server • MySQL • Informix
Main clients	USA, Germany
Development priorities	International marketing, establishing representative offices, developing own line of competitive products



Company name	Reaktivite
Web-site	www.reaktivite.com / www.reaktivite.com.ua
E-mail	sales@reaktivate.com
Address	Ukraine, Kiev, 14, L.Ukrainki blvd. Ap. 105
Phone / Fax	+ 38 044 235 58 75; + 38 050 33 444 13
General manager	Pavel Baranok; pbaranok@reaktivate.com
Offshore software development manager	Alexander Ivanov; aivanov@reaktivate.com
Year of foundation, the year offshore development was started	2001
Founders	Ukrainian private founders
Business model	Custom solutions development
Staff	Technical staff – 10 Management staff – 4
Services	Content management systems, ASP systems development, Commerce CRM and ERP solutions, Portals and community systems, Product and services catalogs with integrated ordering features, On-line publishing systems, Complete websites development, Web site design/redesign, FLASH presentations, Software interface design
Development tools used	<p>Platforms: MS Windows NT/2000 with IIS 4.0 or higher; UNIX operating systems (FreeBSD, Linux, Solaris, etc) with Apache; Any operating system with JDK 1.4 and TomCat installed</p> <p>Database: MS SQL, MS Access, MySQL, Oracle, Interbase</p> <p>Programming language: MS Visual C++, ASP.NET, C# (.NET technology), ASP 2.0 and higher, ColdFusion, PHP 3.0 and higher, Perl, Java Servlets & JSP, JDBC, Enterprise Java Beans, RMI, CORBA, JNDI, Swing, AWT, JavaMail, JAF, JIMI.</p> <p>Communication languages: XML/XSL, HTML/DHTML, JavaScript 1.3 and higher</p> <p>System Architect tools: Rational Rose</p> <p>Methodology: RUP</p>
Main clients	2002 – USA, Canada; 2003 – USA, Canada, UK, Ukraine
Development priorities	Marketing, PR and partnership establishing in North America and Western Europe
Projects	Mantix Media (Canada), The WWWS (USA), Ley Lines (UK), Copywriter UK, Nissan Ukraine, Minolta Ukraine.



Company name	Volia Software (Softline)
Web	www.softline.kiev.ua / www.volia-software.com
E-mail	softline@softline.kiev.ua / info@volia-software.com
Mailing Address	1, Magnitogorska Str, Kyiv, 02660, Ukraine
Phone/Fax	+380 (44) 451 9225 / +380 (44) 573 2806
Company director	Anton Marrero / anton@softline.kiev.ua
Offshore software development director	Yuriy Sivitsky / yuriy.sivitsky@softline.kiev.ua
Year of foundation, the year offshore development was started	1995, 1997
Certification	1997: ISO 9000-3, ISO 9001 2003: ISO 9001:2000
Founder	JSC: top management + investment fund
Business model	Customized software development
Staff number	More than 350 employees
Services	Services: software applications development and support, reengineering and reconstruction of legacy systems, IT consulting, business consulting Specialization: software applications for financial and operational management, accounting and billing, workflow and document flow, Internet/Intranet
Development tools used	Languages: C/C++, C#, Java, Javascript, Delphi, Visual Basic, Vbscript, SQL, PL/SQL, SPL, T-SQL, XML, XSL, HTML, DHTML, CFML, PHP Tools: Rational, Microsoft, Borland/Inprise, SUN, Macromedia, Open Source Methodology: RUP, UML Platform: Windows, Unix, Linux
Main clients	USA, Switzerland, Ukraine
Development Priorities	Marketing and PR abroad, opening international representatives; improvement of software development technologies, project management and quality assurance, certification; new business activities development
International Representatives	<u>USA:</u> Volia Software 123 N. Post Oak Ln., Suite 410 Houston, Texas 77024, USA Phone: +1 (713) 980 9815 Fax: +1 (713) 621 4666 www.volia-software.com <u>UK, France, Italy, Switzerland:</u> SoftXtreme International SA Grand'Places 14 P.O. Box 1449 CH-1701 Fribourg, Switzerland Phone: +41 (0) 26 309 2525 Fax: +41 (0) 26 309 2526 www.softxtreme.com

source valley

INTERNATIONAL OUTSOURCING PARTNER

Company name	Source Valley
Web-site	www.sourcevalley.com
E-mail	info@sourcevalley.com
Address	10 Shovkovichna Str., of.10, Kiev, Ukraine
Phone / Fax	+38 044 253-0269 / +38 044 253-4775
Company director	Roman Khmil/rkhmil@sourcevalley.com
Offshore software development director	Vladislav Petrenko/vpetrenko@sourcevalley.com
Year of foundation, the year offshore development was started	2002, 2003
Certification	CMM compliant; formal certification planned in 2004-2005
Founder	Ukrainian founders
Business model	Project based (testing, maintenance, support) Broker (software development)
Staff number	Production staff – 15 persons (Project Managers – 2) Management staff - 2
Services	Full spectrum of independent testing and quality assurance services: tests development, static, functional, performance, functional, regression testing, test automation, software tuning and optimization Maintenance, support, call centers, help-desk Broker of software development projects
Development tools used	Test tools: Mercury Suite (QTP, Win/Load Runner, Test Director), Seque Silk Suite, Rational Rose Suite, ParaSoft JTest, E-Test Suite, OpenSTA, JMeter Bug Tracking: Bugzilla, Test Director, Star Team, OnTrac, Track Record, PR-Tracker, Team Track, MS Outlook/Lotus Notes
Customers	2003 – USA, Canada
Development priorities	Search for the new clients Marketing & PR for Western region Formal CMM certification



Company name	TeT Co. Ltd
Web-site:	www.tet.com.ua
E-mail:	tet@tet.com.ua
Address:	17 Ekaterininskaya Street, Odessa, 65026, Ukraine
Mailing address	P.O. Box 57, Odessa-11, 65011, Ukraine
Telephone/fax:	380 (48) 777-9728 / 380 (48) 777-5056
Company director	Alexander Tkachev a tkachev@tet.com.ua
Offshore software development director	Alexander Tkachev a tkachev@tet.com.ua
Year of foundation, the year off-shore development was started	1992, 1996
Certification	No (SEI CMM Level 3 – compatible process)
Founders	Citizens of Ukraine
Staff number	Software developers – 20 pers. Project Managers – 3 pers. SPEG/QA – 3 pers.
Services	Custom software development (software consulting), IT Consulting, Business analysis
Specialization	eCommerce Applications, Business to Business Solutions, Customer Relationship, Management, Data Warehousing and Business, Data Analysis Applications, Document and Knowledge Management
Development tools used	<p>PLATFORMS:</p> <ul style="list-style-type: none"> - MS Windows (NT/2000/XP/ME) - Handheld Computing platforms <p>DBMS:</p> <ul style="list-style-type: none"> - ORACLE - MS SQL Server <p>LANGUAGES AND ENVIRONMENTS:</p> <ul style="list-style-type: none"> - Microsft.NET, C#, C/C++, VB.NET, ASP.NET, VB 6.0 - Web Services, XML, XSLT and related technologies - PHP, Perl - ColdFusion, CFML
Main clients	Isogon Corp. (NY, USA) – since 1997, ADS Corp. (NJ, USA) – since 2000
Development priorities	Major priority – controllable grows of the software consulting business (not more than 70% per year). Additionally – developing business analysis and ASP services
Projects	About 20 successfully completed projects from 1500 man hours to 12 man years in scale. No failed projects

ESP



The Elite Software Products (eSP) is an international Consortium of top-quality Ukrainian and American software development and hi-tech companies. We are located in Kharkiv, Ukraine and Silver Spring, Maryland, USA and specialize in outsourced software development.

In carrying out our clients' projects, we emphasize constant communication with the client and seek their approval and input as the project proceeds. We provide full-service software development – from detailing project parameters to testing and quality assurance. We utilize state-of-the-art software and project management tools for the development of our products; the results have been excellent.

The structure of our company has been designed in a way that maximizes benefits for customer:

- The customer can adjust all of the terms of the contract with the central office of Consortium;
- The Consortium's management shall solve the customer's problems maximize the Consortium's resources for the clients benefit;
- By utilizing skilled software specialists from Eastern Europe (with a strong background in programming for the space industry in the former Soviet Union), significant cost savings are passed on to the customer without compromising quality;
- Fulfillment of the customer's requirements, terms of contract, and quality specs shall be ensured by the well qualified management of the Consortium.

Our team consists of about 200 high-professional specialists in the following areas:

- Software Development;
- System Integration and Maintenance;
- Quality Standards;
- IT Consulting and Training.

Our skills include:

Platforms	IBM PC, SUN, RISC 6000, AS/400, IBM 370 (IBM S/390, EC9000)
Operating systems	Windows XP/2000, Windows NT, Windows 9x, Unix (SunOS, Linux, AIX, SCO, BSD), OS/2, OS/400, DOS
DBMS	Oracle, MS SQL, MySQL, Sybase, DB2, FoxPro, Paradox, MS Access, Xbase, Clipper, ADABAS/NATURAL, Db Vista
Languages	C/C ++, Visual Basic, Java, Perl, SQL, Assembler, COBOL, RPG, PL/1, Fortran, Pascal/Object Pascal, PHP, HTML, XML, JavaScript
IDEs/Compilers	Microsoft Visual Studio Enterprise (Visual C++, Visual Basic, Visual Java), Borland C++ Builder, Borland C++ Delphi, Sun Workshop C++, G++, IBM Visual AGE 3.5, Java SDK, ActivePerl
Real-time OS	RTKernel, QNX, VxWORKS, LynxOS
Network protocols	TCP/IP, IPX/SPX, SNA

We believe that all the ingredients for a successful venture are here:

- a ready pool of Software Development talents;
- experienced management skilled in large project implementation;
- new talent trained to IT specifications by the educational institutions;
- low cost, excellent value;
- government support with tax incentives;
- a successful track record.

USA

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Ukraine

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UASWD



The Ukrainian Association of Software Developers (UASWD), registered on June 8, 1999 as a non-profit, non-governmental public organization, unites a number of Ukrainian leading software houses.

UASWD is an international public organization, established to create favorable conditions for the progressive growth of the software development industry in Ukraine. To achieve this goal, the Association will promote political and other programs aiming at the improvement of technologies and ensuring the growth of market for their members and the Ukrainian industry of software development in general, economic growth and the increase of the number of jobs in Ukraine.

Goals and objectives of UASWD

The main activity of the Association lies in the satisfaction and protection of their legal social, economic, creative, national and cultural and other common interests as well as the assistance in the forming of legal, technical, economic, political culture in Ukrainian society.

The main objectives of the Association are:

- forming of a civilized market of software development in Ukraine, struggle for software certification, anti-pirate campaign;
- cooperation with legislative and executive bodies of the governmental authorities in the issues of elaboration and passage of legislative and standard bases, regulating software market in Ukraine;
- assistance in the activities of the governmental and public organizations and the members concerned with the development of high technologies, development, production and sale of computer software in Ukraine and abroad;
- assistance in increasing the personnel level of the Ukrainian software development industry, decreasing the flow-out of human intellectual resources from Ukraine, creating new jobs, training and preparation centers of engineering and scientific manpower;

As of October, 2003, UASWD collective members are:

IDM Ltd., Information Systems Development (ISD) (Dnipropetrovsk), Source Valley, SputnikMedia.Net, International Land Systems Ukraine (ILS-Ukraine), Kvazar-Micro, Komizdat, Mircocosmic Group, SoftPress, SoftServ (Lviv), Telesense Ukraine (Kharkiv), Tessart, Elex (Lviv).

Two Ukrainian largest publishing houses SoftPress and Komizdat are UASWD permanent media partners.

Ukrainian Software Consortium**Description of Organization:**

The Ukrainian Software Consortium acts as a gateway for a network of pre-selected software development companies with a wide scale of competencies and strong experience in serving international businesses. As a technology partnership provider, we assist our international customers in finding, evaluating, and building secure cooperation with Ukrainian IT companies. We also work to minimize cooperation risks with our risk management model, involving anti-lock-in with vendor, reputation tracking, and legal support and financial guarantees on projects.

Today the Ukrainian Software Consortium involves over 25 IT companies, many of which have certified development and quality assurance processes (ISO-9001 and CMM-3). Its member companies have accumulated extensive experience in completing mission-critical projects for Soviet military and aerospace in the in the past as well as for respected international global customers including Delta Technologies, Fiat Avia, DaimlerChrysler Aerospace, Dakota Imaging, Boeing, ING Bank, RaboBank, Kyriba, IFC, GAF, Deutsche Telekom, France Telecom, Scala, Matra and others.

IT Companies selection criteria

Criteria	Facts
Strong experience in offshore programming and other types of IT export	Project leaders of USC member companies have at least 7 years in managing international software projects.
References from recognized international customers	Upon your request we will provide references from internationally recognised customers.
Strong management capacity in project execution according to international industry recognized standards and methodologies	Compliance with industry standards in project (RUP, DSDM) and quality (CMM, ISO 9001) management.
Good language capacity and cultural compatibility	100% of project leaders and 70 % of staff are English-speaking, 30% of project leaders are French-speaking, and 20% are German-speaking. They have strong experience in working within multicultural environments and implementing projects for US, European, and Asian customers.
Cost-effectiveness and competitive pricing (in comparison with Russia, Baltic and other Eastern European Countries)	Ukrainian software developments per hour rates are 25-50% cheaper than Russian and Baltic. After joining the EU, Baltic countries will lose their cost advantages due to strict tax regulations. Prices of contracts with USC will not exceed prices of direct contracts with customers.
Own portfolio of innovations, high R&D potential	Over 40 PhDs and 15 Professors in USC companies staff, close connections with academia.
Good market reputation and transparency	All USC participants took part in the first International research of Ukrainian IT-export industry by Market-Visio (Gartner Group). Participation in industry associations (The Ukrainian Association of Software Developers, The Ukrainian Hi-Tech Initiative,) and business alliances USC and eSP Consortiums.

Competence

To ensure competent advice and the best vendor selection, as well as an optimal cooperation model, we structure business in the form of verticals- and technology-focused competence centers. The competence centers model is intended to best integrate development capacity, expertise, and academic resources by forming marketable clusters of technology vendors. Coordinated by managers with strong industry experience, our competence centers provide a pool of vendors and skills, suiting the majority of corporate IT needs. It also gives our customers flexibility in cooperation models.

Currently we've established competence centers in the following areas:

- ***Banking, Financial Services and Insurance;***
- ***GIS and Remote Sensing;***
- ***Information Security;***
- ***Legacy Applications.***
- ***Video Games and Multimedia;***

Presently, USC is in the process of organizing the following competence centers:

- ***Internet-solutions;***
- ***Transportation;***
- ***Healthcare;***
- ***Education;***
- ***Telecom;***
- ***System programming and data storage***

The USC and its vendor network deliver a wide range of services and custom-tailored products for a variety of customers in majority of industries as well as for government sector

Services of Ukrainian Software Consortium

Directly delivered by USC Business Center	Delivered by our Development Centers
<ul style="list-style-type: none"> ▪ Vendor evaluation and selection; ▪ Project management offices for complex projects; ▪ Consulting on and creating offshore development centers; ▪ Technology commercialization and consulting; ▪ Access to our database of pre-selected technology opportunities from Ukraine (for investors); ▪ Legal support for contracts; ▪ Financial guarantees for contracts; ▪ Development clusters set-up for complex project; ▪ Market research and advice 	<ul style="list-style-type: none"> ▪ Custom software development; ▪ IT systems reengineering and integration; ▪ IT Systems Support; ▪ Quality assurance outsourcing for software development process; ▪ Remote administration; ▪ IT-enabled Business Process Outsourcing (BPO); ▪ Out-staffing (offshore staff for IT departments)

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Ukrainian HI-TECH Initiative

About Ukrainian Hi-Tech Initiative		
Finport Technologies www.finporttechnologies.com	Kiev	<p>Ukrainian Hi-Tech Initiative, an outsourcing alliance of Ukrainian companies operating in the field of software development (http://www.hi-tech.org.ua).</p> <p>Presently, our alliance consists of 15 private companies from Kiev, Kharkov and Dnepropetrovsk, which have contracts with foreign companies that outsource software development. And the number of members is rapidly increasing.</p> <p>The main purpose of the association is to:</p> <ul style="list-style-type: none"> • consolidate Ukrainian software business; • jointly promote the Ukrainian software brand to foreign markets; • jointly work at complex technological projects <p>The range of problems addressed and solutions provided by the member companies is quite broad – starting from the design of web-sites to participating in Delta Air Lines projects on development of navigation systems and management of spacecrafts.</p> <p>Additionally, we have also carried out a number of joint undertakings aimed at raising the level of expertise of our member companies to the level of world markets in software development.</p> <p>We are interested in getting contacts with software consulting companies as well as with end customers that are interested in outsourcing some of their software developments activities to Ukrainian software developers. Our aim is to optimize time and financial resources for the realization of software projects.</p> <p>Victor Maznyuk, Coordinator Ukrainian Hi-Tech Initiative</p> <p>Post Office Box 18 03068 Kiev, Ukraine mail: maznyuk@hi-tech.org.ua www: www.hi-tech.org.ua</p>
KP VTI www.kpvti.kiev.ua/	Kiev	
Novatek www.novatek.kiev.ua	Kiev	
Program Development Systems www.manager-erp.com	Kiev	
Tessart www.tessart.com	Kiev	
Vimas Technologies www.vimas.com	Kiev	
Logis www.logis-pro.com	Kiev	
Center network technologies WEB100 www.web100.com.ua	Kiev	
KIT Group www.kit-group.com.ua	Kharkov	
NIX Solutions www.nixsolutions.com	Kharkov	
SoftPro Workgroup www.wgsoftpro.com	Kharkov	
Technology and medicine www.medtim.com	Kharkov	
FOSS-On-Line www.foss.kharkov.ua	Kharkov	
BeeSoft's www.beesoft.com.ua	Dnepropetrovsk	
ZStyleGroup www.zstyle.dp.ua	Dnepropetrovsk	

5.2. Research participants

Company name:	General Director:	Web-site:
ABF Software Inc.	Karpenko Anton	www.abf-software.com
ABT Solutions	Chebotar' Aurelian	www.abtsolutions.net
Abyss Lights Studio	Zhukov Evgeny	www.abyss-lights.com
ALTA Eastern Europe	Shymkiv Dmitry	www.alta.net
ATRIA Ukraine	Goncharov Alexander Yakovlevich	www.atria.kiev.ua
Automatic Systems & Technologies	Tverdohleb Alexander Nikolaevich	www.autosystems.com.ua
BeeSoft	Ripp Ludmila Markovna	www.beesoft.com.ua
CODEWIND	Bilanovskiy Vladimir Mikhailovich	www.codewind.com
Community8	Mihalko Vladimir	www.community8.com
CINTECH	Kushnir Dmitry Nikolaevich	www.cintech.kiev.ua
CS Ltd.	Babchenko Igor A.	www.scltd.com.ua
Eclipse Software Programming LLC	Lysenko Dmitry Vasil'evich	www.eclipse-sp.com
ELEKS Software	Skrypnik Alexey Alexeevich	www.eleks.biz
EnTechEco	Zubenko Andrey Vladimirovich	www.entecheco.com www.offshore.entecheco.com
Evalica	Verbovetskiy Valery	www.evalica.com
Everlasting Technologies Inc.	Gorzey Yuriy J.	www.everlastingtec.com
Exodus Studio	Borshevskiy Egor	www.exodus.com.ua
Finport Technologies Inc.	Baranov Vladislav Valer'evich	www.finporttechnologies.com www.webobserver.info
GRAD-SOFT	Shevchenko Ruslan Sergeevich	www.gradsoft.com.ua
ICC	Lubivyi Denis	www.icc.com.ua
IDM	Lakiza Vadim Urievich	www.finexpert.com
ILS-UKRAINE Ltd.	Popiv Igor Arsen'evich	www.ils.com.ua
Infopulse Ukraine	Sigov Alexey	www.infopulse.kiev.ua
Information Technologies	Sherbatenko Oleg Viktorovich	www.it.ua
INSART	Soloschuk Mikhail Nikolaevich	www.insart.kharkov.ua
Intelligence Systems GEO	Chabanuk Viktor Savovich	www.isgeo.kiev.ua
Intermedium Corp.	Kolkov Roman Petrovich	www.itsoftmaker.com
JavaRealm Software	Skugarev Sergey	www.javarealm.com
Korzh.com	Korzh Sergey	www.korzh.com
KP VTI	Bud'ko Nikolay Nikolaevich	www.kpvti.kiev.ua
LOGIS	Mesyats Sergey Vladimirovich	www.logis-pro.com
MBS	Alexeev Maxim	mbs.kharkov.com , mbs-ukraine.com
MicroCosmic Group	Kotseba Denis Lukashevich	www.mcgua.com
MIIK	Savchenko N.V.	www.miik.com.ua
Mirasoft Ltd.	Nosov Alexander Mikhailovich	www.mirasoft.com.ua
Miratech Ltd.	Roenko Nikolay	www.miratech-software.com
Novatek Inc.	Sskripka F.M.	www.novatek.kiev.ua
Outsourcing Ukraine	Turkevych Alexander	www.outsourcing-ukraine.com
Pimentos	Perets Jury	www.pimentos.com.ua

Program development systems	Novozhilov Alexander Leonidovich	www.manager-erp.com
Radicom	Tatarov Victor	www.webceo.com
Reaktivatе	Baranok Pavel Alexandrovich	www.reaktivatе.com www.reaktivatе.com.ua
RQL-Ukraine	Kofto A.G.	www.rql.kiev.ua
Saga	Zvirid Georgy	www.saga-software.com
SoftElegance	Stolbov Andrey	www.se.kiev.ua
SoftFund	Feigin A.	www.sfund.kiev.ua
SoftLine	Marrero Anton	www.softline.kiev.ua
SoftServe Inc.	Kytsmey Taras	www.softservecom.com
Softwarium	Neverodskiy Petr	www.softwarium.net
Source Valley	Khmil Roman	www.sourcevalley.com
Technocom AT Ltd.	Dubrovskiy Sergey Egorovich	www.techno-at.kiev.ua
Telesens KSCL Ukraine Ltd.	Rubin Eduard Efimovich	www.telesenskscl.com.ua
Tessart	Beloded Vladimir	www.tessart.com
The KIT Group	Shevchenko Jury Petrovich	www.kit-group.com
Ukrainian Chamber of Science and Technology	Anchizhkin Dmitry	www.uktex.com.ua
UNA	Kozyarevich Dmitry	www.una.com.ua
UPT	Perekupka Vitaly Valentinovich	www.uptsoft.com
VIMAS Technologies	Maksakov Andrey	www.vimas.com
Vitgroup Ltd.	Tarasenko Vitaly Anatolievich	www.vitgroup.com
Viva Solutions	Kazban D.V.	www.viva-solutions.com
Webo	Posnov Igor Viktorovich	webo.com.ua
WG SoftPro	Karnozhitskiy Alexey Vladimirovich	www.wgsoftpro.com
ZstyleGroup Ltd.	Zabegailo Sergey Vladimirovich	www.zstyle.dp.ua