



2013 Global Production Automation Testing
Customer Value Enhancement Award



F R O S T & S U L L I V A N



50 Years of Growth, Innovation & Leadership

Customer Value Enhancement Award Production Automation Testing Global, 2013

Frost & Sullivan's Global Research Platform

Frost & Sullivan is in its 50th year in business with a global research organization of 1,800 analysts and consultants who monitor more than 300 industries and 250,000 companies. The company's research philosophy originates with the CEO's 360-Degree Perspective™, which serves as the foundation of its TEAM Research™ methodology. This unique approach enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Based on the findings of this Best Practices research, Frost & Sullivan is proud to present the 2013 Global Customer Value Leadership Award in Production Automation Testing to JOT Automation Ltd. (JOT Automation).

Significance of the Customer Value Leadership Award

Key Industry Challenges Addressed by Superior Customer Value

Keeping proper pace with technological advancements is the key to success for present day business processes. For instance, with smart devices gradually becoming more and more complex due to the wide variety of applications running on them, it is quite essential to maintain both top device quality and low production costs. Due to the complex structure and operational architecture of the smart devices, the testing time necessarily becomes longer than usual, posing a key challenge for the device manufacturers.

The assurance of prompt entry into the market through minimized and automated testing, while also maintaining quality and keeping cost parameters in check, is a significant challenge for the manufacturers. Frost & Sullivan feels that the company offering fully automatic tests on handsets in a repeatable and reliable environment, maximizing capacity and quality while lowering labor costs at the same time, is best positioned to achieve higher success over other participants in this highly competitive market.

Best Practice Award Analysis for JOT Automation

The Frost & Sullivan Customer Value Leadership Award is presented each year to the company that has demonstrated excellence in implementing strategies that proactively create value for its customers with a focus on improving the return on the investment that customers make in its services or products. This Award recognizes the company's inordinate focus on enhancing the value that its customers receive, beyond simply good customer service, leading to improved customer retention and ultimately customer base expansion.

JOT Automation's Performance in Production Automation Testing

Frost & Sullivan independent analysis confirms that JOT Automation holds the distinction of being one of the prominent suppliers of production automation and testing solutions across the globe. Catering to diverse and emerging customer needs, the company has built up a strong base of customers, which include leading companies from across industry verticals, such as information technology (IT), automotive, life sciences, shipping and aviation. With an annual global turnover of around EUR 50 million, JOT Automation serves the best requirements of customers through its test and production solutions across different countries in Europe, North America and Asia. Being in operation for around 25 years, the company is best poised to leverage its technological competency across 13 countries worldwide to enhance customer value, such that it is able to nicely create a niche for itself in the global production automation testing market.

Key Performance Drivers for JOT Automation

Factor 1: Strong Product Offerings

With a comprehensive approach to mitigate human effort, JOT Automation relies on maintaining absolute product quality, at par with industry standards and varied customer requirements. This gives the company the added capability to retain its market position, consequently enhancing customer value. With its all-inclusive, cost-effective and user-friendly production automation testing solutions, Frost & Sullivan feels that the company has been consistent in its approach to outweigh similar market participants in the same domain.

JOT Automation is also in close proximity with varied test instrument and chipset manufacturers, deriving the right technological competency from them in order to develop apt market-driven test strategies and customer-friendly solutions. The increasing demand for testing instruments has led JOT Automation to develop solutions that are efficient enough to withstand the product and technological complexities. Leveraging its technological efficiency, the company, with its high-quality test fixtures, is continuously striving to extend and improve its product portfolio in order to deliver absolute customer satisfaction.

JOT Automation's main factories are in Estonia and China, the areas from where the highest level of demand surfaces. The company operates in Europe, Americas and Asia and employs in excess of 300 people in 13 countries. In addition to its self-developed service centers, JOT Automation is ready to collaborate with regional fixture manufacturers, so that its customers experience supreme satisfaction on an ongoing basis. Two of the key flagship products that properly highlight the company's supremacy over similar products currently available in the market are the JOT M10 and JOT Automation J409-100 G2.5/G3 solution. The JOT Automation JOT G3, newly launched in February 25, 2013, is an efficient and innovative improvement to the previously available JOT G2.5 test handler. It is a state-of-the-art solution that is capable of

performing varied test operations across a single platform. It also enables end-users to execute fully automated tests of mechanical, Radio Frequency (RF), electrical, audio, and visual interfaces of a wide number of handsets. Bearing added benefits, such as robust capacity, repeatability, and high quality, this solution of JOT Automation is aptly designed to exceed individual customer requirements. Capable of expediting operational efficiency while minimizing labor costs, this newest addition to the product portfolio is able to initiate fully automatic tests on handsets in a repetitive manner. Serving as an integrated platform to carry out multiple tests in comparison to divided test solutions or manual tests, this significant product offering truly affirms higher quality and ultimate efficiency. Therefore, Frost & Sullivan is of the opinion that this product clearly marks a breakthrough in the mobile industry, demonstrating its efficient capabilities to enable mobile manufacturers (end-users) to save time and money.

The other production test solution of the company for smart devices, the JOT M10 Functional Test Solution, clearly dominates the market with its user-friendliness, robust capacity, and ability to withstand mass volume testing environments. Introduced on November 29, 2012, this solution effectively speeds up the development cycles, ensuring high production capacity. An improved version of its existing, highly populated and widely accepted JOT Multi Level Tester, Frost & Sullivan expects this solution to redefine the testing environment by being the most effective, accessible and flexible testing solution for functional testing across mobile phones, smartphones, tablet computers, PCs, motherboards, and automotive electronics.

The solution extends added value to customers due to its capability to operate in the research and development (R&D) domain, as well as in the real-time production environment, maintaining prompt scaling up of the production process. In addition, its modular system architecture allows easy compliance with various production criteria that need to be met during a product's life cycle. This efficient and prompt delivery of satisfaction and value addition truly enhances the customer satisfaction quotient, helping the company to carve a niche for itself in the global production automation testing market. All of these distinct improvisations and extensions to its wide array of test components, fixtures, test boxes, test handlers and all-inclusive test solutions are effectively designed to address the diverse customer requirements, keeping perfect pace with technological advancements.

Factor 2: Wide Breadth of Application Areas

Extreme flexibility and user-friendliness are the core focus areas of JOT Automation's solutions. Being the smart provider of test and production solutions for intelligent products, components and electronics, the company serves the wide ranging customer requirements with equal ease. Proficient in its delivery approach, the company's innovative and top-class solutions address needs across industries such as telecom, automotive components,

computing, security and defense, medical and healthcare, home and entertainment and lighting.

With noteworthy services in the telecom domain, the company has been successful in delivering more than 5,000 test systems, coupled with over 50,000 product-specific test fixtures to the global telecommunications industry. More than a million phones are being tested every day with JOT Automation's testing solutions; however, the company is still engaging itself to increase its capacity levels and address the ever-growing market needs - while also enhancing customer value. Apart from providing high-level support to the telecom market, the company leverages its mass production know-how to deliver assembly and testing solutions in the automotive component segment, by extending support in the areas of powertrain, body and safety, display, and instrumentation systems. Customized efforts to address the needs of the medical and healthcare, security and defense and home and entertainment market have all enabled JOT Automation to stay at the helm of production automation testing.

Factor 3: Technological Competency

JOT Automation utilizes its extensive market experience and expertise, along with its technological competency, to build its highly-innovative production automation testing solutions. Based on machine vision, robotics and sensor technologies, the company's products are best suited to deliver economies of scale to its customers. By incorporating machine vision, the company eliminates the need for product-specific hardware, consequently improving the total cost of ownership. Additionally, in tandem with technological improvisations and dynamic advancements, the company is focusing to segment its research capabilities in the areas of miniaturization and need for desktop solutions. Identifying and addressing the emerging market requirements, JOT Automation is well poised to implement its technological competencies in the best possible manner, delivering utmost customer value.

Factor 4: Customer Support Services

With a robust approach in implementing business strategies, along with a comprehensive set of solution offerings, JOT Automation has clearly demonstrated its excellence in comparison to other market participants. Wide acceptance levels among customers, supported with extension of business horizons beyond set limits, have positioned the company ahead of similar production automation testing companies worldwide. Frequent product introductions and consistent innovations through product improvements have highlighted the company's acumen in delivering the best support services to the customers.

In addition, JOT Automation offers broad-based maintenance packages, which are tailor-made for specific production requirements, allowing customers to select from a wide assortment of service offerings. Such services range from life-cycle optimization, spare parts supply inspection, and proper maintenance. Thus, by catering to a globally diverse

customer base with its effective service-oriented approach, JOT Automation truly distinguishes itself in the competitive landscape.

Conclusion

The necessary ability to provide robust services and maximize the return on customers' investments has been the core focus of JOT Automation ever since its inception. In this approach to satisfy customers, Frost & Sullivan appreciates the fact that JOT Automation employs substantial efforts in designing and delivering innovative solutions, in sync with emerging technological advancements. Frequent product introductions and enhancements, along with the company's strategic decision to extend its business markets, truly enable it to develop close relationships with its customers. As such, in view of such efficient capabilities to serve clients better than others, JOT Automation is the worthiest recipient of the 2013 Frost & Sullivan Global Customer Value Enhancement Award.

The CEO 360-Degree Perspective™ - Visionary Platform for Growth Strategies

The CEO 360-Degree Perspective™ model provides a clear illustration of the complex business universe in which CEOs and their management teams live today. It represents the foundation of Frost & Sullivan's global research organization and provides the basis on which companies can gain a visionary and strategic understanding of the market. The CEO 360-Degree Perspective™ is also a "must-have" requirement for the identification and analysis of best-practice performance by industry leaders.

The CEO 360-Degree Perspective™ model enables our clients to gain a comprehensive, action-oriented understanding of market evolution and its implications for their companies' growth strategies. As illustrated in Chart 1 below, the following six-step process outlines how our researchers and consultants embed the CEO 360-Degree Perspective™ into their analyses and recommendations.

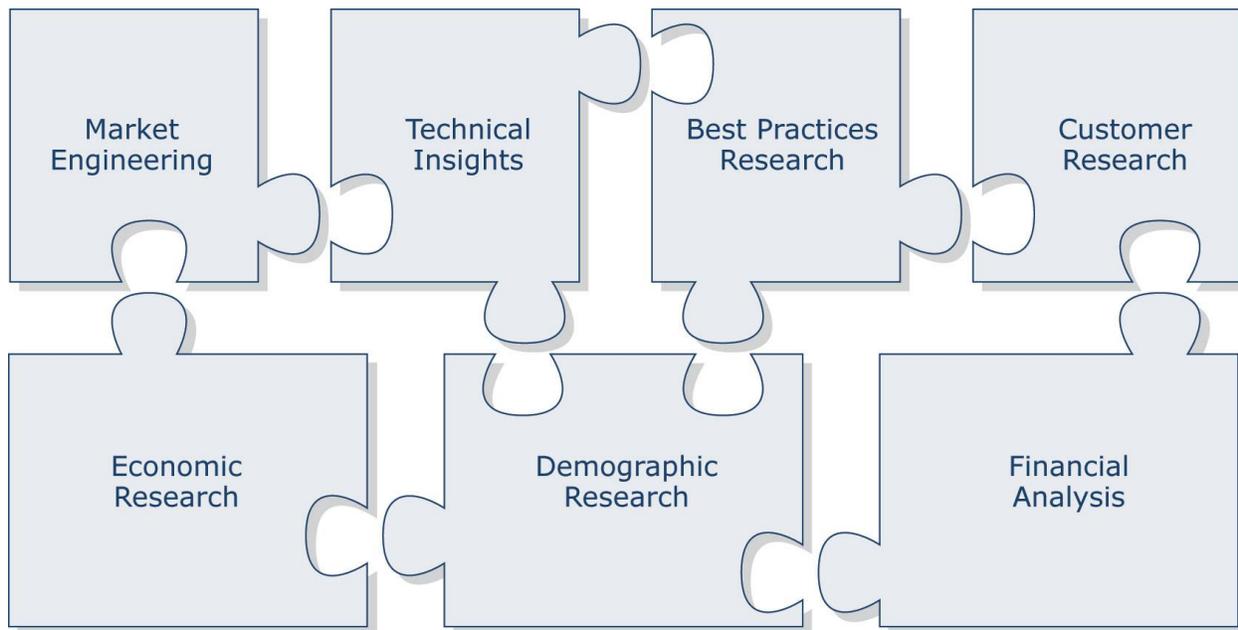
Chart 1: The CEO's 360-Degree Perspective™ Model Research



Critical Importance of TEAM Research

Frost & Sullivan's TEAM Research methodology represents the analytical rigor of our research process. It offers a 360-degree view of industry challenges, trends, and issues by integrating all seven of Frost & Sullivan's research methodologies. Our experience has shown over the years that companies too often make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Frost & Sullivan contends that successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. In that vein, the letters T, E, A and M reflect our core technical, economic, applied (financial and best practices) and market analyses. The integration of these research disciplines into the TEAM Research methodology provides an evaluation platform for benchmarking industry players and for creating high-potential growth strategies for our clients.

Chart 2: Benchmarking Performance with TEAM Research



About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best-practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 40 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.