version 2
August 2022

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IT Knowledge Integrators

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IT Knowledge Integrators
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Who we are
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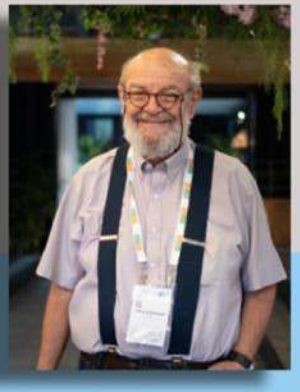
STKI Celebrating
30 Years
March 1992 till March 2022
We are the Knowledge Integrators



Dr.Jimmy Schwarzkopf

Jimmy is a founder of STKI (META Israel)
and holds degrees in Engineering (BSE & MSE)
and in Business & Entrepreneurship (DBA & MSIA)

Areas of coverage:
Israel IT market
CIO & IT Management
Verticals
- Finance
- Health

Innovation management

Galit Fein

Galit has been working in STKI since 2003,
holds an MBA from Ben-Gurion University
and is a registered Chief Risk Manager (CRO)

Areas of coverage:
Organizational Transformation
Organizational Structure
OCIO and PPM tools
Strategic Planning and Budget mng
Business Process Automation (RPA, OCR, ect)
Blockchain
Web 3.0 and Metaverse
Sourcing

Einat Shimoni

Einat has been working in STKI since 1996,
holds a BA in social studies from Bar-Ilan University
and an MBA from Tel-Aviv University.

Areas of coverage:
Customer engagement strategies:
- Customer Experience
- CRM
- Marketing Automation
- Omni channel
- Service Design

Data driven transformation:
- Data strategy
- Data operations
- Data science, Machine Learning and AI
- Democratization
- literacy and monetization

Pini Cohen

Pini has ben working in STKI since 2000,
Pini holds BA in Computer Science from Technion
and MBA from Tel Aviv University Cum Laude.

Areas of coverage:
Cloud strategies and operations
Cloud native development and architecture
Traditional Hardware and Data Center
Devops and cyber operation environment
Finops and data platforms
Middleware and modern integration
Technology procurement management

Reut Shefer Bar

Reut joined STKI during 2021,
holds MBA in Finance from University
of Haifa and MBA in
Data Science Analytics
from Tel-Aviv University

Areas of coverage:
Enterprise Applications – ERP, SCM…
eCommerce
WCM – Web Contant Management
ECM - Enterprise Content Management, KM
HCM, HR and work environment
EX - Employee Experience
QA and Testing technologies and software
Call Center
Productivity Tools

WHEN IT RAINS IT POURS: global events raining on IT BUDGETS

Q4 2021 & Q1 2022 results forecasted a strong IT market in Israel. IT budget increases were going to be large; staffing needs were increasing (although, staffing IT professionals was difficult), growth could be found across nearly all IT sectors. But, since we started our survey in January 2022, global & local events have changed our optimistic outlook:

- *War between Russia and Ukraine*
- *Price of oil and gas increases*
- *Inflation erupted pushing the world into a recession.*
- *Interest rates increasing after years of "free money"*
- *Massive layoffs are happening because of a "startup & high-tech" bubble exploding*
- *Corona -health situation deteriorates again*
- *5th elections in Israel in about 3 years (Nov 1)*
- *Because of the elections 2023 Israel State Budget will not pass (lowering government IT budgets)*

Despite the potentially "BAD" news limiting the economic expansion there are plenty of reasons to be optimistic,
We expect IT budgets in Israel to rise 12%-13% in 2022 (but given the above mixed political and economic signals we couldn't forecast 2023 or 2024 with an acceptable margin of error).

Digital transformation is not enough; smart "business" transformation will be required: Customers expect experience-driven, hyper-personalized, and data-driven business models. The first-mover digital advantage is over.

Now, the real work begins. ***Smart business transformations cannot start without modernizing complete capabilies of "business value" ecosystems (applications, components, services, data and APIs)*** across a wide range of platforms and often laden with technical debt

Dr.Jimmy Schwarzkopf
Research Fellow & Managing Partner

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Founded in 1992, STKI is the leading business technologies market research and strategic analyst firm in Israel.

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- Over 30 years of experience in the IT analyst sector and thousands of annual face-to-face interviews with key industry participants have enabled STKI analysts to establish solid, long-standing relationships with customers.
- STKI **customers include major IT organizations** (government, financial institutions, telecoms, manufacturing, medical, education, etc.) and **IT suppliers/vendors** (infrastructure and software suppliers, consulting and professional services firms).
- **STKI works closely with vendor senior management** (strategy, business development, and marketing).
- Where **end users are concerned, analysts meet with CEOs, CFOs, CMOs, CDOs and CIOs** (as with all levels of IT decision making) thereby attaining complete **information of their technology as well as their business needs.**

STKI's mission is to advise and analyze users of business technologies as well as their suppliers while conducting original research and providing advisory services regarding all parts of the technology puzzle.

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STKI services include

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Unlike some research and advisory firms

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

*Virtual meetings**

Face-to-face meetings

STKI Analyst House Calls (for both users and vendors)

CIO STKI "Help Desk"

Inquiries

Surveys

Strategic Marketing & Positioning

Round Tables for users

*Weekly Webinars**

Vendor Discovery Series (Newsletters and workshops)

Vendor Innovation Workshops

In-house Workshops

CIO Annual Bootcamp

CTO Annual Bootcamp

Brainstorming (based on Design Thinking) Workshops

STKI Annual Summit

**** new***

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Z-meetings & budget analysis

- 250 CIOs
- 16 Industries

product briefings & sales analysis

- 456 VENDORS
  - Presented XOOs Briefings
  - 150 categories
  - Over 1000 products/services offered in Israel

XOOs of z-presentations
64 WEBINARS
2-day virtual conference

What did STKI analysts do in 2021

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industry	Budgets 2013	Budgets 2017	% growth
media/content	$100	$175	75.00%
fin other	$190	$265	39.47%
SMB/SME	$300	$400	33.33%
security	$410	$506	23.41%
government	$1,250	$1,530	22.40%
retail	$195	$230	17.95%
education	$230	$270	17.39%
health	$290	$335	15.52%
high tech	$720	$825	14.58%
manuf	$810	$880	8.64%
transport	$305	$325	6.56%
banks	$815	$865	6.13%
IT local vendors	$150	$150	0.00%
insurance	$400	$395	-1.25%
utilities	$285	$235	-17.54%
telecomm	$250	$205	-18.00%

Per FTE	# operations / # guidance
25 percentile	1.58
Median	2.00
75 percentile	2.75

STKI Research Results:

1. *IT Trends*
2. *Surveys about organizational issues*
3. *Round Table Summaries*
4. *Industry IT Budgets*
5. *IT Market Forecasts by category*
6. *Vendor Tiers by category*
7. *Product Positioning*
8. *Staffing Ratios*

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In order to calculate the "IT Market" (what is bought/sold in Israel)

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Technology Users

Technology Vendors

What users bought?
From whom?
Why?

how much did they sell?
to whom?
for how much?
competitors?

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Our study looks at any vendor value (products/services) sold to enterprises (also government & security) in Israel; taking into account the client's view/mindshare of value delivered

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We rank VENDORS by REVENUE and CLIENT MINDSHARE

rankings are based partly on new projects, new names and market penetration growth

- Yearly revenues of hardware sales and hardware maintenance
- Yearly revenues of software subscriptions & licenses, software maintenance
- Differentiation between new projects and continuing projects (New projects count more)
- Distinguish between work done by the vendor's employees and work outsourced to other vendors. The revenue should be transferred to the vendor actually doing the work.
- Differentiate revenues from projects done in fixed price, cost plus (SLA defined) , managed services and those done by staff augmentation (non SLA) projects.
- Differentiate value of work done by high level internal professionals in a project versus that done by staff augmentation employees in the clients IT department.
- We do not include any work/ products for OEMs and military non-IT projects.

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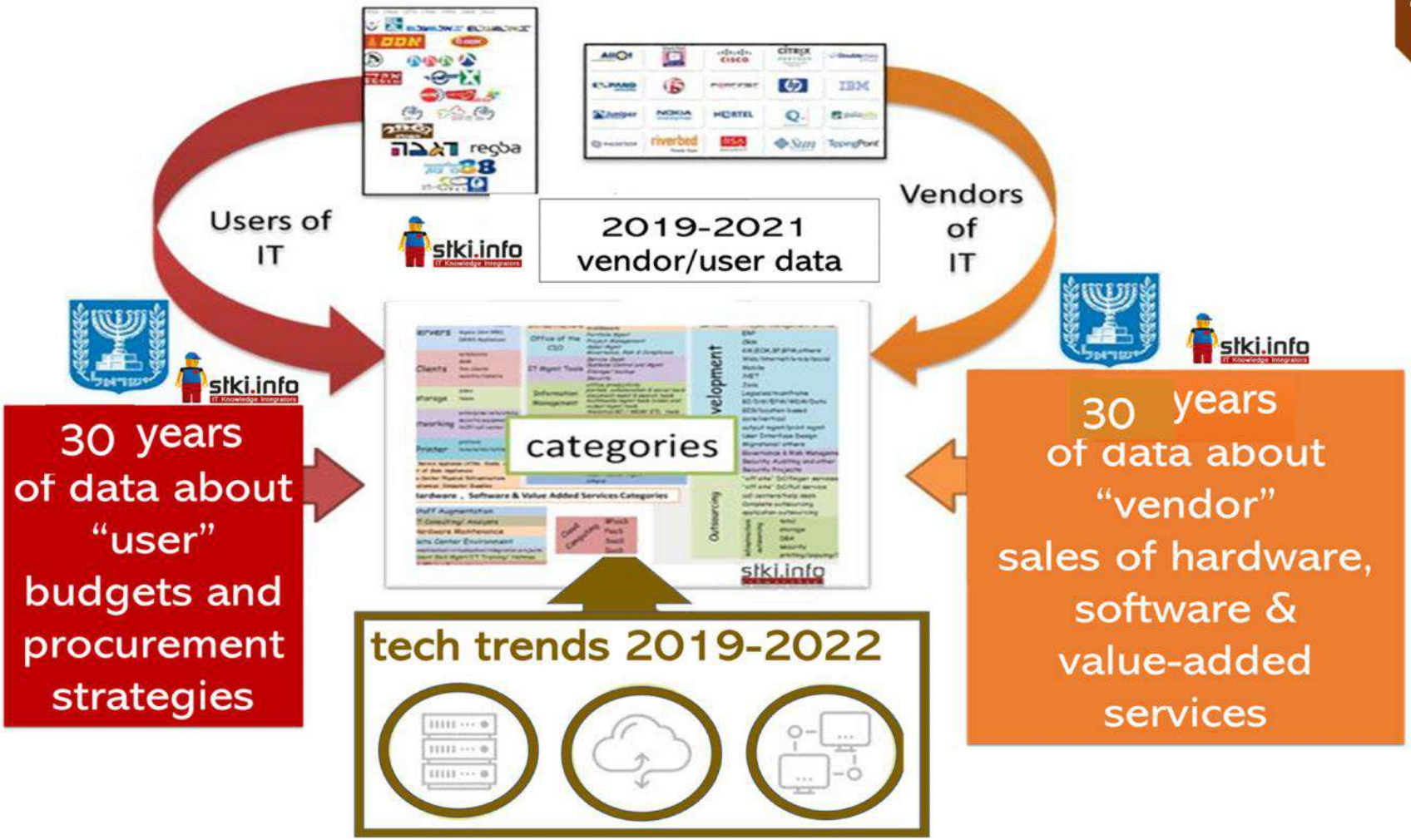

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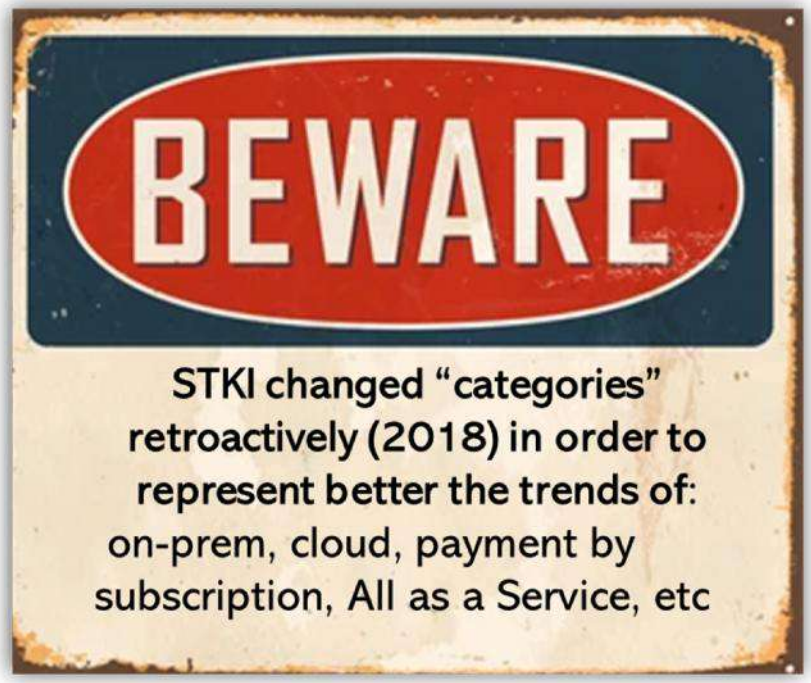

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VALUE ADDED SERVICES

- IT Strategy Consulting
- **Organizational Transformation Consulting** (organizational models, change mngt, agile consulting, methodologies etc.)
- **Data & Analytics Strategy Consulting** (organizational, methodologies, architecture, use cases, culture, literacy etc)
- IT Infrastructure & Cloud Consulting
- Application Projects Consulting
- **Customer Experience & Digital Consulting** (customer journeys, Customer Experience consulting, service design, Digital consulting) - doesn't include UX!
- Automation & Process Consulting
- Project Management/ OCIO Consulting
- Cyber Security Consulting
- Software Maintenance (3rd party)
- Hardware Maintenance (3rd party)

on-prem

- Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects
- DevOps and Infrastructure automation projects
- Software integration of middleware, SOA & BPM
- Cyber security product implementations
- Unified Communication Projects (IM, Video, Voice)

cloud

- Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects
- Devops and Infrastructure automation projects
- Software integration,of middleware, SOA & BPM
- Cyber security product implementation
- Unified Communication Projects (IM, Video, Voice)

- PPM & Project management
- ALM & Development & Testing tools implementation
- Low Code tool implementation
- ERP Implementations
- HR & Talent Mngt & Payroll Implementations
- CRM Implementations
- ITSM Implementation
- E-Commerce and Marketplace Implementations
- Marketing Automation Implementations
- Advanced Analytics, Data Science and ML projects
- Data management implementation (quality, etl, catalogs...)
- BI implementation / development
- Data & Analytics Cloud migration (help in migrating DW and Data Lakes to the cloud)
- General Software Development (except Web & Mobile)
- Web & Mobile Development
- UX Design
- *Finance Industry Core Projects*
- *Transportation*
- *Public (COVID19) Projects*
- *e-payments Projects*
- *Retail Projects*
- *Public (government) modernizations*
- Contact Center and Multi channel engagement projects
- Employee Collaboration & Engagement Tools
- Knowledge Management (ECM, Portals, Search, Knowledgebases..)
- Technological Innovation Projects
- Automation tools (RPA, OCR) Implementations
- Blockchain projects
- IoT Projects

- Professional Education, Coaching & Mentoring
- Project testing & QA
- Fruition & Implementation (הטמעה)
- Regulation Projects
- Auditing, Governance & Risk Management
- Complete and/or application outsourcing (Client owns the HW)
- Infrastructure Outsourcing (infrastructure, storage mngt, DBA services)
- Call Centers/Help Desk Outsourcing Services
- Cyber security managed services - CISO as a service, etc. (excluding SIEM service)
- SIEM as a Service
- Printing Outsourcing Services (pay per click)
- Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)
- Near shore
- Off shore
- Staff Augmentation (gulgalot)
- Location Based Projects
- Self-Service Projects
- Tele-medicine Projects

Over 150 categories (revised)

SOFTWARE

- Infrastructure & System Software
- storage & backup SW
- data platforms (SQL, NoSQL dbms)
- Cloud data platforms (SQL, NoSQL dbms)

ON-PREM

- App\WEB Server, BPM,, Emulation, , BRMS APaaS (container platforms)
- ESB, SOA, FTP, Messaging, , Streaming, API Mngt

CLOUD

data platforms (SQL, NoSQL dbms)

- IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ***excluding*** ITSM, Service Desk
- ITSM - Service Desk
- Endpoint related tools
- Network\Web cloud services (FW, WAF, ddos services , etc.)
- data content related tools (DLP, DB FW, DLP Halbana, etc.)
- cyber management tools (SIEM tool, Incident responds, automation)
- Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access service edge) IDM, Access
- Other cyber tools (secure development, awareness etc.)

- Project & Portfolio Management
- Development tools, ALM, Devops for all environments (including Mobile)
- Low Code tools
- Governance, Risk & Compliance
- Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)
- Digital Output Management/Customer Communication Management
- Employee Collaboration & Engagement Tools
- BI and Data Discovery Tools
- Data Mgmt. Tools (including data catalog, governance, ETL, quality)
- Data Science and ML/AI Tools
- ERP
- vertical / core applications
- CRM
- HR/ Talent Mgmt./ LMS
- Marketing Automation Software
- Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc.…)
- E-Commerce and Marketplace Platforms
- Web Content Management Platforms
- PLM Systems
- Blockchain platforms
- RPA Platforms
- IOT tools and platforms
- *other software (GIS, WMS, transportation, etc)*
- *other software (banking, insurance and other financial market software)*

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INFRASTRUCTURE

- servers X86
- Legacy (non-x86)
- Data Appliances
- HCI appliances
- Public Cloud IaaS PaaS (Compute as a Service)
- Window PCs (Notebook & Desktops) Enterprise only
- Non window's PC's Enterprise only
- Enterprise Storage :Disks (HHD and SSD)
- Enterprise Storage Tape Libraries, VTL Backup and other storage Appliances
- Public Cloud IaaS Storage & Backup as a Service
- Enterprise Networking
- Security / Cyber Appliances
- VoIP/Call Center Equipment
- Call Center as a Service
- Data Center Physical Equipment
- Off-site Data Center: Co-Location; Hosting (Client owns the HW)
- POS +Self Service (ATM/Kiosks/other)

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456 IT VENDORS (4/2022) in Israel

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Do IT Wise
2BOpen
2Plus
3bears
5ive
A10 networks
A2Z
accelario
Accenture
Access Layers Portnax
Acronis
ACS
Actifio
ActiveView
adacom
ADMS Solutions
Advantech
Afek Systems
AgileSparks
Aginix
AKT
ALD
Alexander Schneider
AllCloud
Almog
Altenative
AlterNet
Aman (Eternity)
Aman Computers
Amarel
Amazon
Amdocs
Anagal
APC
Apple
Applicat
arcserve
Ardom
Artis (ADA Systems)
ASUS
Attunity
AutoFont / Docomation
Automation Technologies Group (One1)
Avaya
AVcom
AVCS
Avnet
AXperts
ayehoo
AZTEK

Barracuda Networks
BBT
BDA Projects
BDO
Be2See
BeLocal
BenefIT Technologies
Bezeq International
BGate
BI-conix
Bitplus
Blossom
Blue Coat
BMC
Boris Gilad
B-Pro
Brillix
Britannica Knowledge Systems
Brocade
Brother
Bugsec
bulwarx
Bumpyard
Bunkersec
Business & Decisions (B&D)
Bynet
Bynet-Semech
Byon
C4
CA
Calanit Carmon (ONE)
Calcom
Canon
Carmelan
CAV Systems
CB.IT
CB4
Cellcom
Cellosign
Centerity
Check Point
Checkmark
ChipPC
Cisco
Citadel
Citrine BI
Citrix
Cloud Intact
Cloudera
Cloudera
CloudTech
Codeeazis
Cognit
Comax
Comda

ComLead
Comm IT
CommVault
Complete
ComposeDoc
Comsec
Consist
ConVista
Copytech
Correlata
Corvette
Covertix
Cryptzone
Csoft
CTM
CyberArk
Dario IT
Data Cube
DataBank
DataTapas
DB best
db@net
DBN
DellEMC
Deloitte
DesignIT
DMway
DNA-IT
DocuSign (ARX)
DoIT
DorIT
Double Du
Dropbox
Dvash
E2M
E4D
Elad
ELK Group
ellipsis
Emerset
Emet
Energy Team
Epsan
Ergo
Ericsson
Ernest & Young
Evolen
Ewave
Experis
F5
FBC Technologies
fireglass
FMR
Forcepoint (Websense)
ForeScout

Fortinet
Fujitsu
GBS
Getter Tech
Gigamon
GiniApps
Gizmax
Google
GreenSQL
GRSec
Gstat
HaShavshevet
HDS
Head-on
Hilan
Hilan-Ness
Hilan-Qlikview
Hilan-We-Ankor
HMS
Hortonworks
HP
HP-CS
HPE
I.E.Mittwoch
IBM
IDC
Imperva
Infinidat
Inkod
InnoVAD
Integralis
Integrity
Intellinx
intensity
Intentia Israel
Interdeal
Internet Group
IPSec
ipv-security
I-Rax
IT Solutions
ITAnalyzer
ITassist
I-til Consulting
ITlogic
ITNAVpro
Ixia
Juniper
Kaminario
Kaspersky Labs
Kineo
Knowedge
KPMG
Lenovo
Lexmark

Liacom
Libi Software Technology
Linnovate
Lior Lurye
Liveperson
Log-On
Ludan Group
Mafil
Magalcom
Magic Software
Maglan
Malam-Team
Mapr
Matan
Matrix
Matrix/28secure
MatrixBI
Mavkyim Software Solutions
Maxoft
Mbileiron
McAfee
Med1
Medatech
medsec
Mellanox
Menahel4u
Meteor
Methoda
MIA Computers
Microsoft
MidLink
milgram
MindU
Minicom
Mobideo
Mobilitpro
Mobisec
Moblin
ModelZ
Modern Systems
Mongodb
Mpl
MSP
MultiPoint
MyBusiness
Naya Tech
Ness-Pro Digital
Netalizer
NetApp
NetCloud
Netcraft
Nevo
NewAge
Nextcom
NGSoft

Nice
Nimblestorage
Nipendo
Nogamy
Nokia (Alcatel-Lucent)
Normative
NPTech
Nutanix
oasistech
Omega Israel
One1
Opal Systems
Open Legacy
Open Storage
Opisoft
Oracle
Orantech
Oranus
Oregano
other PCs
P.Z. Projects
Palo Alto
Panorama
Partner
pelican-tech
Penguin IT
PNMsoft
Point of View
Polycom
Printer Center
Priority
Proceed
Prodware
Profix
ProLink
Promisec
Puzzlehead
PwC
Pyramid Analytics
Qesem
QualiTest
Raam
Rachip
Radvision
Radware
Ramdor
RAZEL
Raz-Lee
Realcommerce
Red Hat
Reduxio
RELS
Renaissance
Rimini Street
Rittal

Riverbed
Safend
SafeNet
safeway
Salesforce
Samsung
Saninteractive
SAP
SASA-Security
sec4biz
SecureNet
SecuriTeam
see-security
Segment
Sensecom
Seperia
ServiceNow
ServiceWise
ServIT
Seventh Dimension
Simplivity
Sinapia
SIT
Skywind
Smarthings
SmartIT
smartsoft
SmartX
Smarx
Social Knowledge
Softimize
Software Source
SoftwareAg
Solarwinds
SourceIT
Spinnaker Support
SQLink
SSP
Steerli
Stratoscale
Sungard
switch-it
Symantec
Synerion
Sysaid
Sysnet
Systematics
Tadiad
Tadiran Telecom
Taldor
Talend
Tata
TechMind
Telemessage
TERASAFE

Test Pro
That's IT
Ticomsoft
Tikal
Tingz
Tiuv
Todan
Top Group (Ramdor)
Toshiba
Train-Mate
Trapx
triad security
Triggerplus
Triple C
TripleT
Tripplite
TrustIT
Trustnet
TutIT Soft
Twingo
twisted
TZUR
UA- User Accessibility
U-BTech
UCL
UI
Unilink
Unitask
UPTech
Uptima
Uteam (IdeoDigital)
UXVision
Valinor
Valire
Value Plus
Varonis
vCC
Veeam
Veidan
VeNotion
Veracity
Verint
Veritas
Virgonet

Vision.bi
VMWare
Waterfall
Websence
WebTech
WEDO
WEDO
We-Do (Unitask)
WinIT
Wise
Wisesec
Wizsupport
WonderNet
Xerox
Xiama
Xtramile
Yael Software
YKM
Yoyo
y-tech technologies
Zaponet
Zebra Technologies
Zemingo
Zikit
Zilumatic
Ziv Systems

RESULT #1 ISRAELI VENDOR RANKINGS

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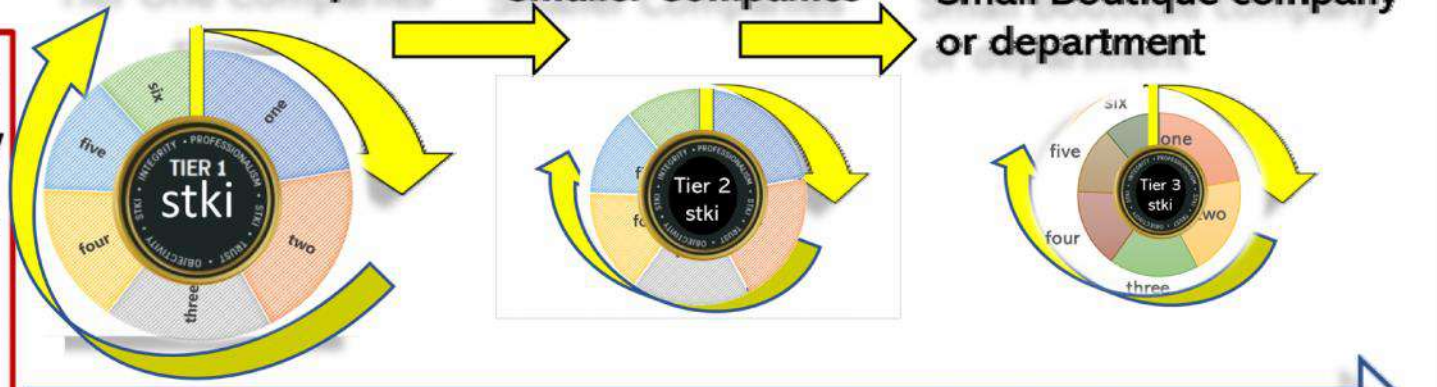
The Area a company occupies in the circle is not relevant and has no meaning.
STKI has signed NDAs with the vendors (revenues, projects) and we tried to minimize opportunities for backward engineering of the data .

STKI calculates market sizes by revenues/sales and not deliveries or invoices

Tier One Companies → Smaller Companies → Small Boutique company or department



STKI ranks vendors by REVENUE and CLIENT MINDSHARE

rankings are based partly on new projects, new names and market penetration growth

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Israeli Product Positioning Slides 17

This positioning* is intendent to reflect **THE DEGREE** to which a product is **PRESENT AND SUPPORTED IN ISRAEL**

*is NOT a technological or functional positioning and SHOULD NOT be used as such.

RESULT #2 "Israeli Marketing & Support Positioning"

Focused on the enterprise sector (not SMB)

- X axis (Market Presence):
  Installed base; New sales; Mindshare
- Y axis (Local ISRAELI Support):
  Number and quality of Sis; localization; local R&D

Vendors to watch: New players that only recently entered the market and therefore cannot be evaluated against longtime players

Global leaders: marked according to international analyst firms

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Israeli Product Positioning Slides 18

RESULT #2 "Israeli Marketing & Support Positioning"

Y axis (Local Support):
Number and quality of support experts, it's localization and language support and if there is local R&D

Global leaders
according to international analyst firms

Vendors to watch
New players that only recently entered the market and therefore cannot be evaluated against longtime players

X axis (Market Presence)
Installed base; New sales; Mindshare

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PPM INTEGRATORS 148

	Clients	New Clients 2021-2022	Integrators
Clarity (CA)	Western Digital - SaaS, Leumi Card, Harel, Strauss, Orange, Pelephone, Bank Mizrachi, Teva, Playtech, Elbit, HOT, The Federation of Local Authorities, Air Force, Sheam, Clalit	IEC פיקוד העורף, לוטם	Proceed
MSP	IA, Avalon Ins. Cellcom, Phoenix, Leumit, Justice Department, Clal Bit, Bank Igud, Delek, Paz, Min.of the Environment, Visa CAL, Bank Discount, Migdal, MOD, Prime Minister's Office, Maccabi, AIG, Bazan, Bank Israel, Bank of Jerusalem, Essence, Rafael, S	Bank Leumi התקשוב המשלתי IEC, Phoenix (Strateg Planning) Strauss-W (SaaS)	
Sciforma	Bank Discount, logistics, Teva, Visa Cal, BVR, Nova, Evogene, Leadcom Hazera Genetics, Bid Bank Networks, IDF, Veraz, Opgal, HOT, ZIM, Isracard, Machteshim agan eng, Intel ISDC, Plasson, Solaredge, Given Imaging, ICL Tracks, Arkal, Ministry of Health, Mincu, Holon Municip, Technostat ח"מנ, Credorax Group, Nesher, Sapience, MoD, Water Authority, Bank Hapoalim-strategy	Menora, ICL, Ir Opgal, Zera, Genetics, Orbot KLA	

Global leader

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APPLICATION INTEGRATION SELECTED INTEGRATORS 126

Vendor	Product	Israeli Rep.	Integrators
IBM	WMB Websphere Message Broker	IBM	Matrix, Ellipsis
Iconduct	Iconduct	Iconduct	Ness Pro One
Tibco	BusinessWorks		Yeal Software
Redhat	Fuse	Redhat I	
Workato	Workato		
SoftwareAG	WebMethods	Software	
Oracle	OSB	Oracle Is	
Magic	XPI	Magic Isr	
WSO2	WSO2 Enterprise Integrator		

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BI GENERAL PLATFORMS - Part 1: 164

Package	Rep Israel	Integrators
SAP BO, SAP SAC	SAP Israel	SAC (SAP Analytics Cloud) and BO: One, Hilan-Ness-DXC, iProsis, Matrix DnA, Malam-Team, Skywind, BDO (BICS), Aman, SQLink, Nogamy, Abra – Oranbit (BO), Data Cube
Microsoft Power Platform Power BI	Microsoft Israel	Aman, SQLink, Hilan-Ness, One, MatrixDnA, Consist, Bynet SW, Elad Data, Malam-Team, Data Cube, Vision BI, MCS, SolidBI, Yael Group, Nogamy, Abra – Oranbit, PWC
Pyramid Analytics	Pyramid Israel	Nogamy, Normative, Aman, Data Cube, SolidBI, Hilan-Ness
IBM Cognos Analytics		
Salesforce (Tableau)	Sa SIT	
Salesforce Einstein Analytics	Sa	

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ERP Integrators - Part 1 179

Package	Israel Rep	Integrators
Oracle ERP cloud Netsuite e-Business Suite	Oracle Israel	Oracle ERP Cloud: Oracle consulting, One1, Yael Group Oracle Netsuite: Netcloud, One1, iCloudius, AllCloud, Deloitte, Top Solutions, WinIT Oracle eBusiness Suite: Yael Group, DXC, PWC, TATA (TCS Israel), ONE1
SAP	SAP Israel	Hilan-Ness-DXC, IBM, ONE (Teldor+Xact + Advantech), Malam-Team, Deloitte, TATA (TCS Israel), Accenture, Convista Israel (SAP for Insurance), ValuePlus, Abra, Kyndryl
SAP Business One		Top Group (Ziv Systems + RELS), Complete, Menahel4U, BDO Ziv Haft, Xioma, Segment, UPTech
SAP by Design		Malam-Team (SeidorMalam), Alfacloud, Complete, ERP Logic
E-Tafnit, Tafnit 7	Matrix	Matrix, Alpha Consultants
QAD EE	SIT	SIT, ManofIT, Tirosh
Priority	Priority	Matrix - Medatech, One1 - FBC, Agrosoft, EDP, eBase, Priority, BiteERP, Infobase, Gap, Tirosh, Eshkol, IT Backoffice, Pitronim, SIBUD, Login, Tadiad, Epilog, ERP Guru, Dsi, T.S.Net, Open Mind, Yael Group (Tulip), Kama
Infor (M3)	Intentia Israel	Intentia Israel
ONE1 ERP	ONE1	ONE1 + Freelancers

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RESULT #3
ISRAELI INTEGRATORS PER PRODUCT CATEGORY

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Manufacturers/Software Houses, Distributors, VARs NO double bookings for IT Market Size Forecasts

20

Resellers (VARs) get credit only for their value added unless the manufacturer/software house is not present in Israel, then they get full credit.

Integrators and other Value Added Service Providers get credit only for the "services-work" they contributed to the project.

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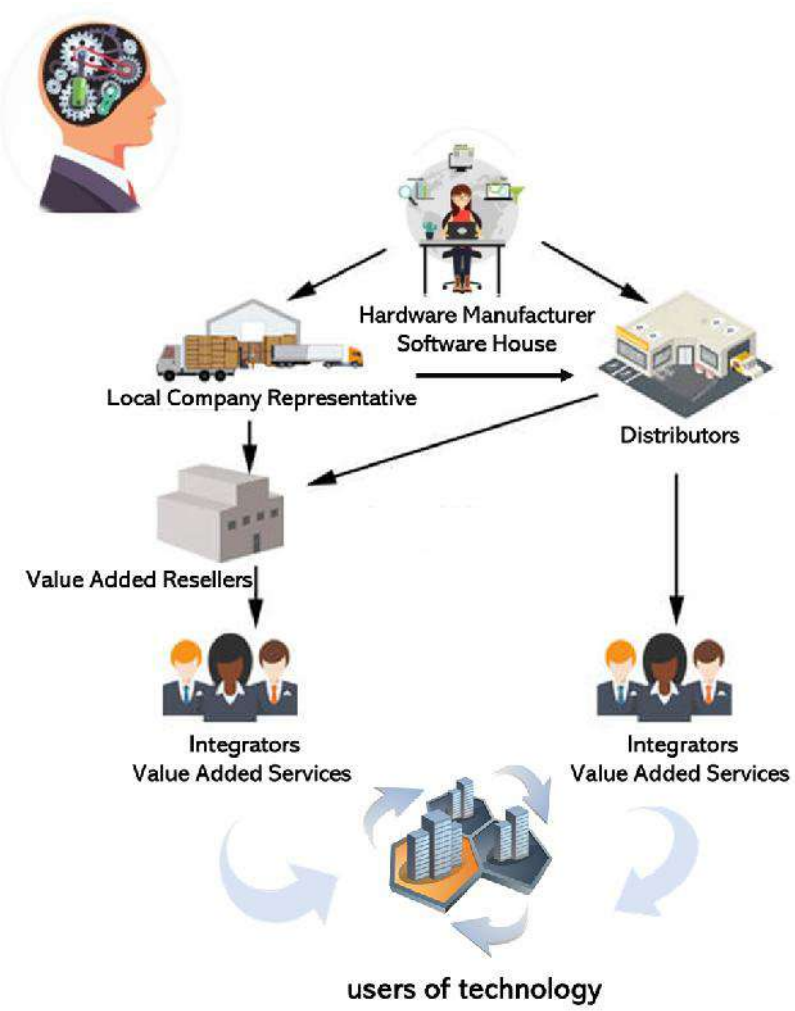

DISTRIBUTORS (*usually are not shown in our study*) are intermediary reseller entities; between the original MANUFACTURERS OF HARDWARE PRODUCTS or SOFTWARE HOUSES and other entities in the distribution channel (VARs and INTEGRATORS).

VALUE-ADDED RESELLERS (VARs) offer third party software and hardware to the end user or integrators at a markup, along with a ***limited*** combination of procurement consulting, configuration, and customization services (*shown under HARDWARE or SOFTWARE)*

INTEGRATORS offer ***professional's services*** (consulting, developing, implementing or sourcing manpower) in order to deliver enterprise computer services to the organization. *(shown under VALUE ADDED SERVICES)*.

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"Israeli Positioning" slides 22

This is NOT a technological or functional positioning and SHOULD NOT be used as such.

This positioning is intended to reflect

ONLY THE DEGREE

to which a product is

PRESENT AND SUPPORTED IN ISRAEL

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ISRAEL 2022

World Population 7.8 billion

Israel Population 9.2 million (0.12% of total)

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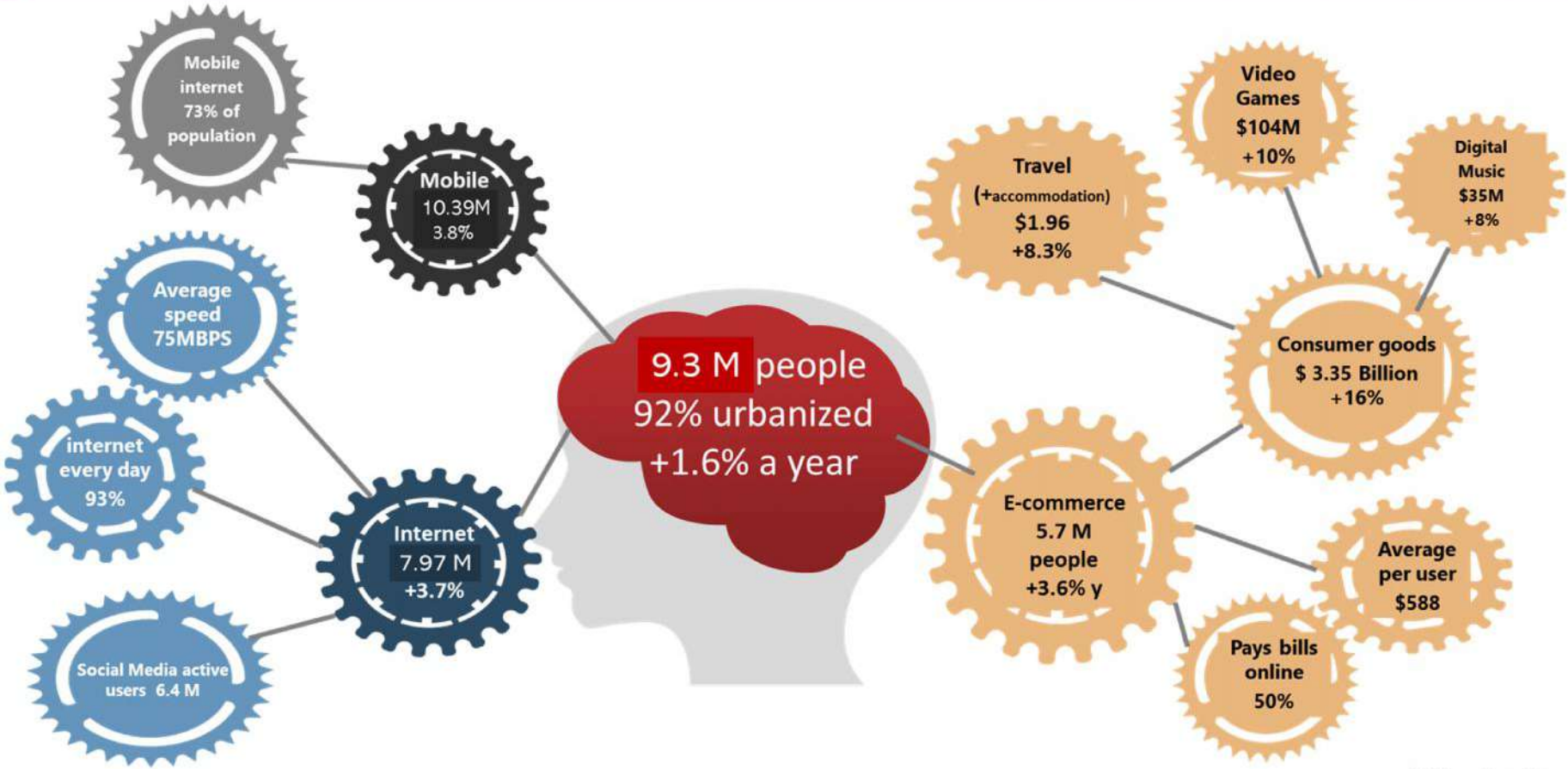
Data about Mobile, Internet, eCommerce 24



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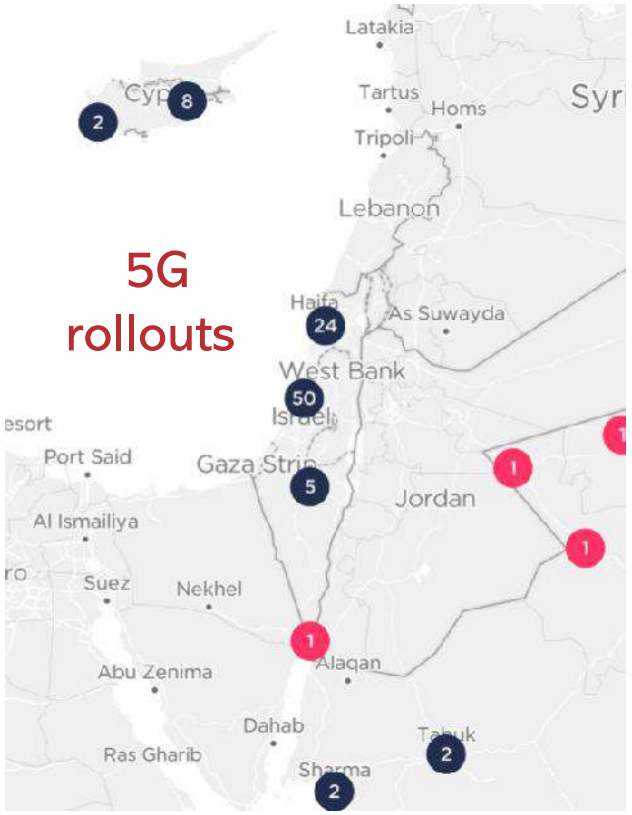
Internet, cellular use and 5G penetration in Israel 2022 25

There were 7.97 million internet users in Israel in January 2022.

Israel's internet penetration rate stood at 90.0 percent of the total population at the start of 2022. Kepios analysis indicates that internet users in Israel *increased by 295 thousand (+3.8 percent) between 2021 and 2022*.

However, issues relating to COVID-19 continue to impact research into internet adoption, so *actual internet user figures may be higher* than these published numbers suggest

GSMA Intelligence shows that there were 10.39 million cellular mobile connections in Israel at the start of 2022 (equivalent to 117.3 % of the total population) growth of 383 thousand (+3.8 percent) between 2021 and 2022.



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STATISTICS and important DATA… telecom

Fixed line operators	Bezeq, HOT, 012 Smile, Cellcom
Number of fixed phone lines	3.4 million (2014)[1]
Cellular mobile network operators	Pelephone, Cellcom, Partner, Hot Mobile, Golan Telecom
MVNO operators	Rami Levy, Free Telecom – x2one Israel, Home Cellular, 019 Telzar, Cellact
Number of cellular subscribers	10.276 million (2014)[1]
Multi-channel TV operators	HOT (cable), yes (satellite)
Number of TV subscribers	1.485 million (2014)[1]
Number of Internet Service Providers (ISPs)	50+ (2014)[1]
Number of broadband subscriber	~2.075 million (2014)[1]
Average Internet speed	37Mbps (2014)[1]

Three companies operate fiber optic submarine communications cables connecting Israel and Europe:

Operator	System name	Year operational	Total design capacity	Landing points
Telecom Italia	MedNautilus	2002	3.84Tb/s	Italy
				Greece
				Turkey
				Israel
				Cyprus
	LEV	1998	20Gb/s	Italy
				Cyprus
				Israel
Bezeq International	JONAH	2012	7.2Tbit/s	Italy
				Israel
Tamares Telecom	Tamares Cable	2012	42Tbit/s	France
				Cyprus
				Israel

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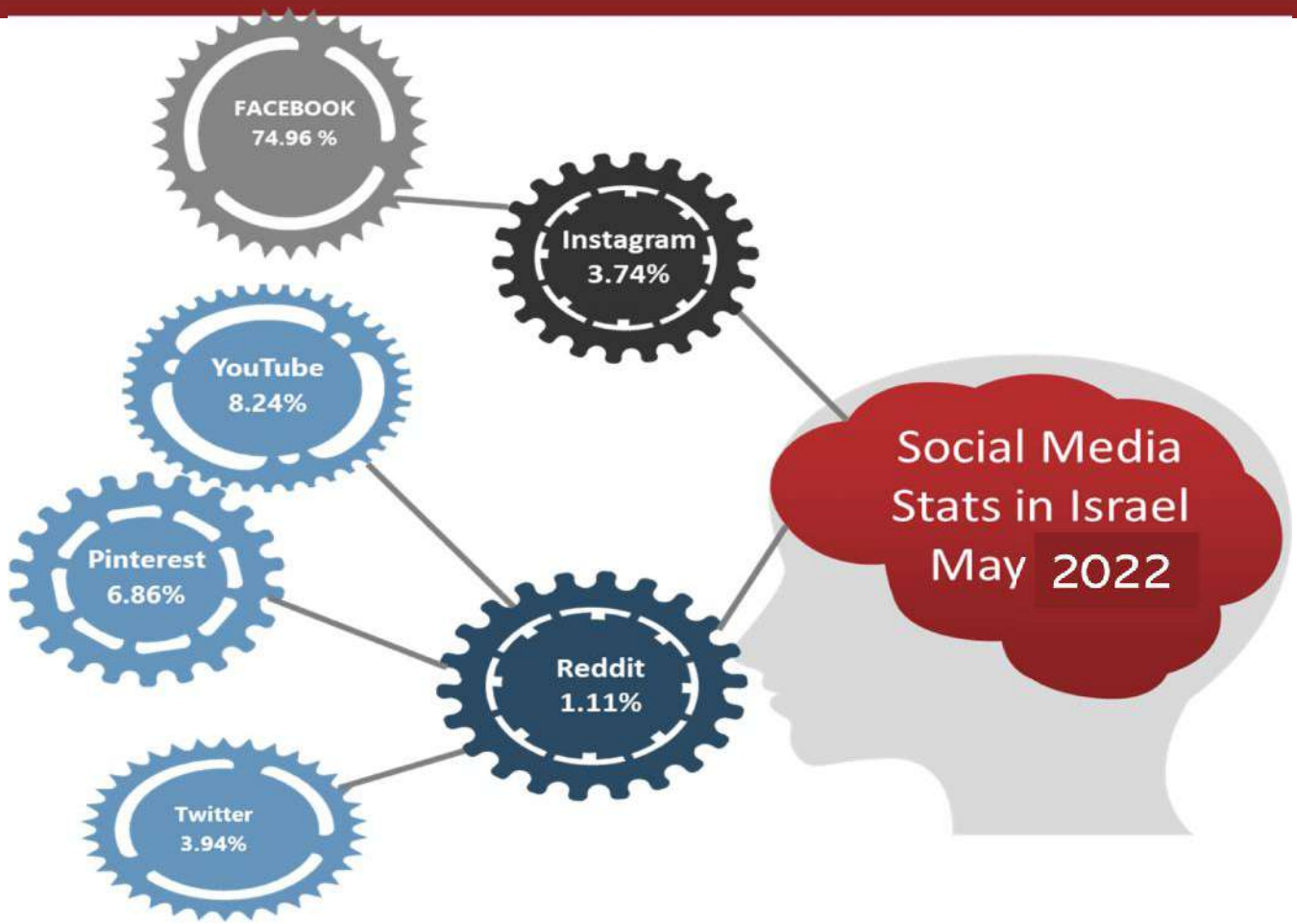
use of Social Media as % of population

27



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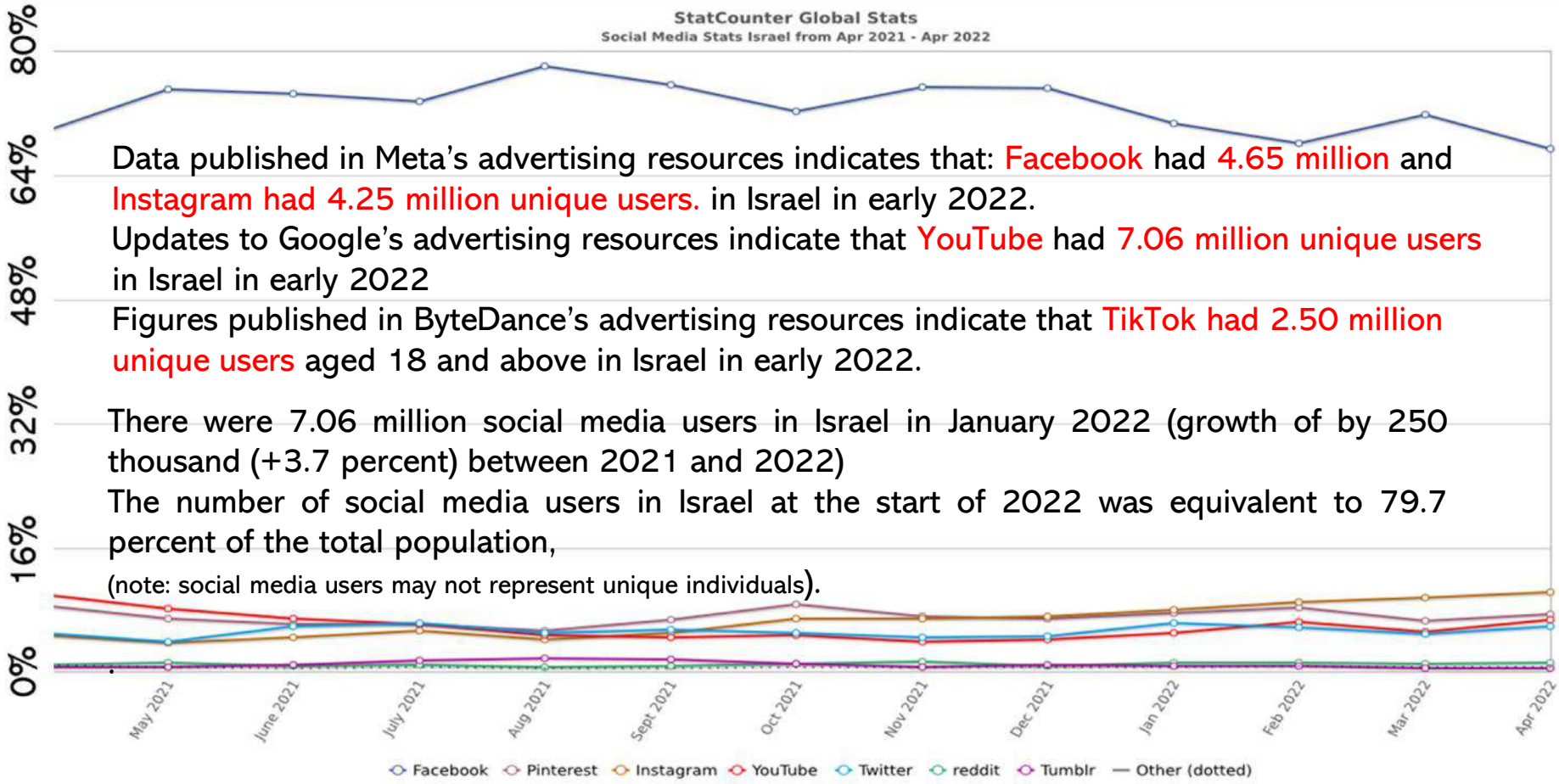
StatCounter: Israel Social Media 4/2021 till 4/2022

28



Data published in Meta's advertising resources indicates that: Facebook had 4.65 million and Instagram had 4.25 million unique users. in Israel in early 2022.

Updates to Google's advertising resources indicate that YouTube had 7.06 million unique users in Israel in early 2022

Figures published in ByteDance's advertising resources indicate that TikTok had 2.50 million unique users aged 18 and above in Israel in early 2022.

There were 7.06 million social media users in Israel in January 2022 (growth of by 250 thousand (+3.7 percent) between 2021 and 2022)

The number of social media users in Israel at the start of 2022 was equivalent to 79.7 percent of the total population,

(note: social media users may not represent unique individuals).

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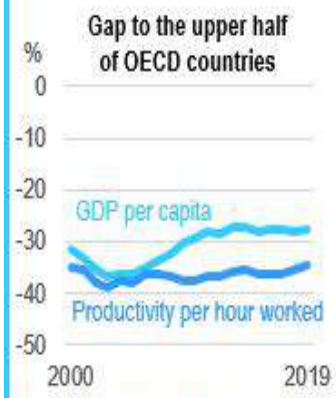
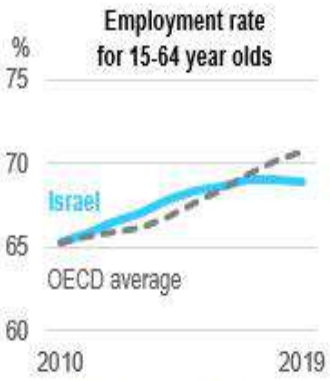
OECD

Economy

GDP per capita is 28% lower than OECD best performers.



Productivity is 35% lower than OECD best performers.



Employment rate is average and was stagnant before the 2020 crisis.

Inequality

Inequality is higher than in most advanced economies.

The poorest 20% of households earn 6.3% of total income.

2018 or latest year available

Environment

More than 3/4 of the population is exposed to harmful levels of air pollution.

GHG emissions have decreased in recent years.

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Israel	2018	2019	2020	2021	2022	2023
	Current prices NIS billion	Percentage changes, volume (2015 prices)				
GDP at market prices	1 341.6	3.7	-2.1	6.3	4.9	4.0
Private consumption	731.2	4.0	-9.2	10.2	6.6	4.6
Government consumption	305.3	2.7	2.5	1.0	1.0	0.4
Gross fixed capital formation	286.1	3.0	-4.0	9.1	6.2	5.3
Final domestic demand	1 322.6	3.5	-5.3	7.7	5.2	3.8
Stockbuilding[1]	7.8	0.2	1.1	-0.3	-0.2	0.0
Total domestic demand	1 330.4	3.7	-4.2	7.3	5.0	3.8
Exports of goods and services	402.4	3.7	-1.9	11.4	6.5	4.9
Imports of goods and services	391.3	3.3	-9.4	15.4	5.2	4.4
Net exports[1]	11.2	0.1	2.0	-0.4	0.6	0.4
Memorandum items						
GDP deflator	_	1.9	0.9	2.4	2.1	1.3
Consumer price index	_	0.8	-0.6	1.5	2.1	1.4
Core inflation index[2]	_	0.7	-0.1	1.3	2.1	1.4
Unemployment rate (% of labour force)	_	3.8	4.3	5.2	5.0	4.3
Household saving ratio, gross (% of disposable income)	_	2.8	11.0	6.7	3.6	3.1
General government financial balance (% of GDP)	_	-3.9	-10.8	-5.6	-3.9	-3.2
General government gross debt (% of GDP)	_	59.5	71.5	71.5	70.8	70.5
Current account balance (% of GDP)	_	3.4	5.4	5.7	5.6	5.7

1. Contributions to changes in real GDP, actual amount in the first column.
2. Consumer price index excluding food and energy.
Source: OECD Economic Outlook 110 database.

Data Analysis 2Q2022
StatLink https://stat.link/lc3dy2

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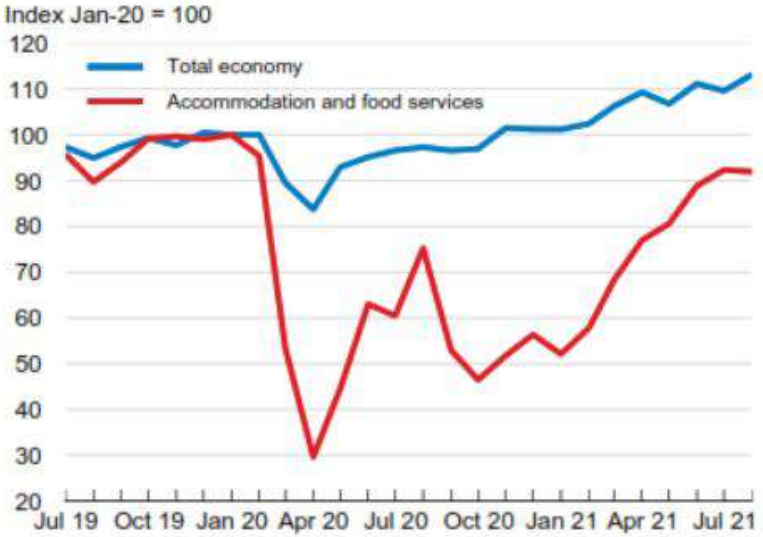
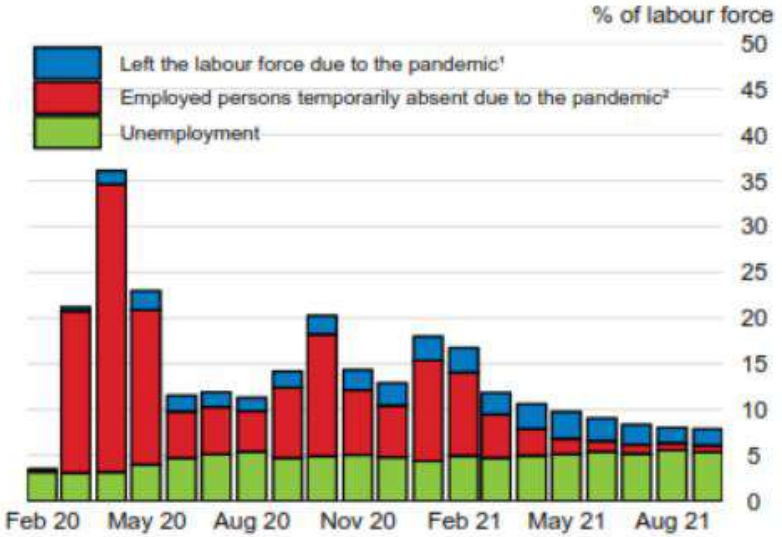
Activity is expanding robustly
Revenue index (VAT)



The labour market is recovering but unemployment is still high



1. Series includes persons not in the labour force who stopped working due to dismissal or closure of the workplace since March 2020. Data not available before March 2020.
2. This includes employees on unpaid leave, employees who were absent during the week due to reduced workload, work stoppage or other reasons related to the pandemic and excludes quarantined persons.
Source: Israel Central Bureau of Statistics; and OECD calculations.

StatLink https://stat.link/w6ag09

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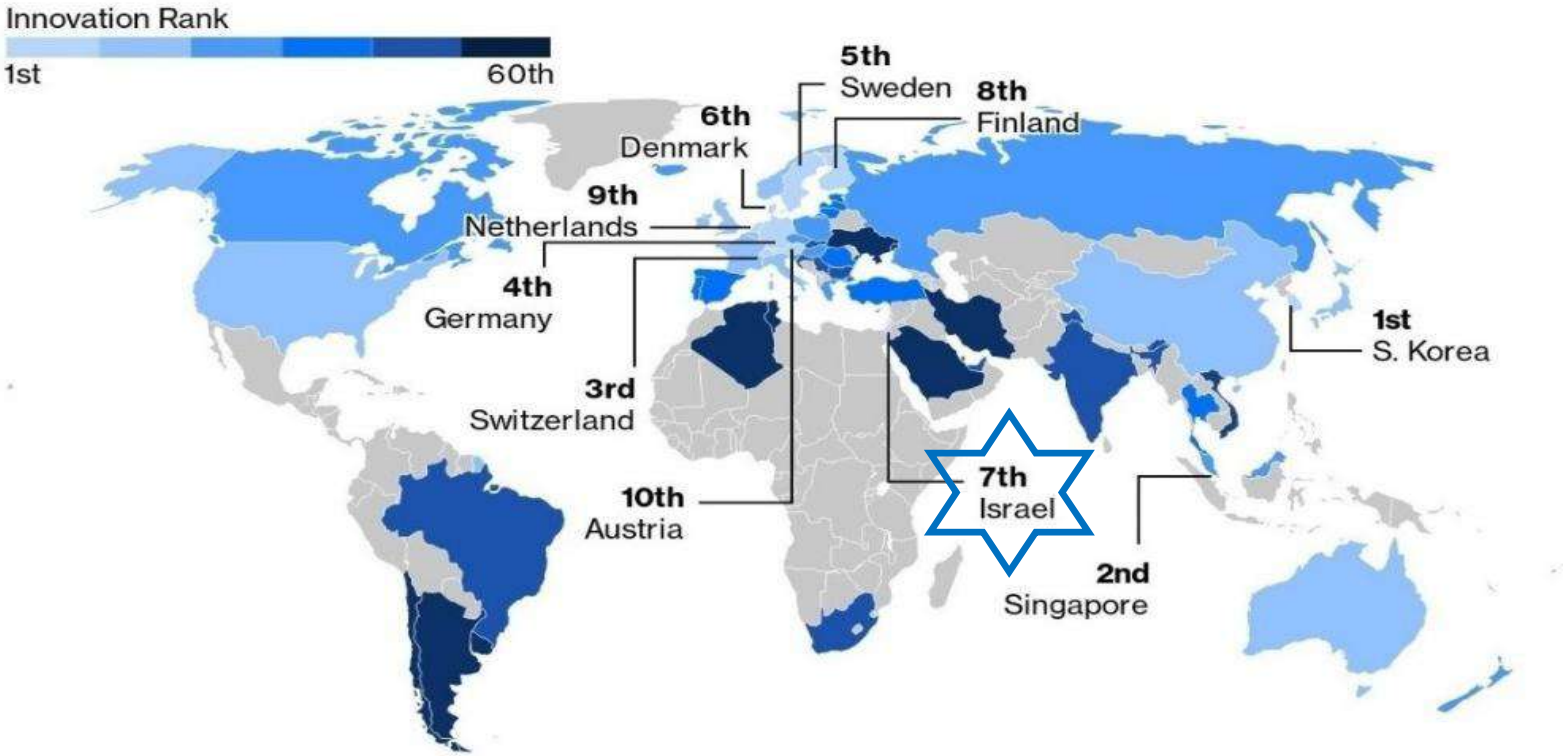
Bloomberg Innovation Index 2021



Sources: Bloomberg, International Labor Organization, International Monetary Fund, World Bank, Organisation for Economic Cooperation and Development, World Intellectual Property Organization, United Nations Educational, Scientific and Cultural Organization

Bloomberg

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THE BLOOMBERG INNOVATION INDEX

Research & Development

Top 5
[illegible]
[illegible]
Israel
Finland
[illegible]
[illegible]

Post Secondary Education

Top 5
South Korea
Russia
Finland
Israel
Ukraine

Research Personnel

Top 5
Finland
Iceland
Denmark
Israel
Singapore

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Global Innovation Index 2021

ISRAEL

15th Israel ranks 15th among the 132 economies featured in the GII 2021.

The Global Innovation Index (GII) ranks world economies according to their innovation capabilities. Consisting of roughly 80 indicators, grouped into innovation inputs and outputs, the GII aims to capture the multi-dimensional facets of innovation.

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Global Innovation Index 2021

Rankings for Israel (2019–2021)

	GII	Innovation inputs	Innovation outputs
2021	15	18	12
2020	13	17	13
2019	10	17	8

- Israel performs better in innovation outputs than innovation inputs in 2021.
- This year Israel ranks 18th in innovation inputs, lower than both 2020 and 2019.
- As for innovation outputs, Israel ranks 12th. This position is higher than last year but lower than 2019.

14th Israel ranks 14th among the 51 high-income group economies.

1st Israel ranks 1st among the 19 economies in Northern Africa and Western Asia.

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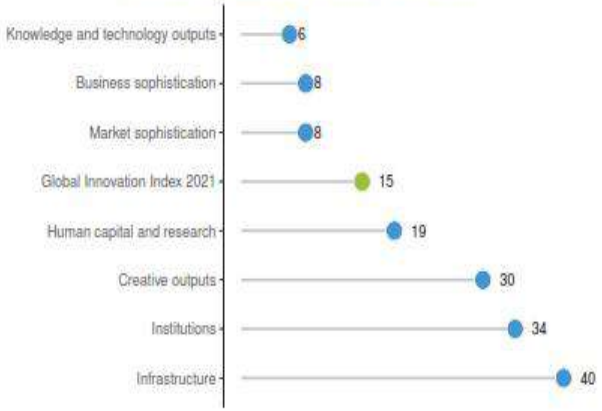
Global Innovation Index 2021

OVERVIEW OF RANKINGS IN THE SEVEN GII 2021 AREAS

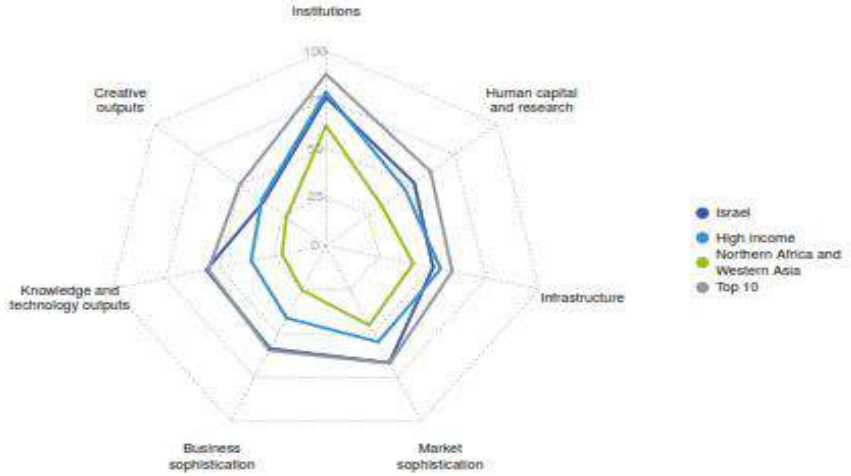
Israel performs best in Knowledge and technology outputs and its weakest performance is in Infrastructure.

The seven GII pillar ranks for Israel



Note: The highest possible ranking in each pillar is one.

The seven GII pillar scores for Israel



High-income group economies

Israel performs above the high-income group average in four pillars, namely: Human capital and research; Market sophistication; Business sophistication; and, Knowledge and technology outputs.

Northern Africa and Western Asia

Israel performs above the regional average in all GII pillars.

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Global Innovation Index 2021

Strengths and weaknesses for Israel

Strengths			Weaknesses		
Code	Indicator name	Rank	Code	Indicator name	Rank
2.3.2	Gross expenditure on R&D, % GDP	1	1.1.1	Political and operational stability	60
4.2.3	Venture capital investors, deals/bn PPP$ GDP	1	1.2.3	Cost of redudancy dismissal	114
4.2.4	Venture capital recipients, deals/bn PPP$ GDP	1	2.1.5	Pupil-teacher ratio, secondary	68
5.1.3	GERD performed by business, % GDP	1	2.2	Tertiary education	77
5.2	Innovation linkages	1	2.2.2	Graduates in science and engineering, %	85
5.2.1	University-industry R&D collaboration	1	2.2.3	Tertiary inbound mobility, %	70
5.2.3	GERD financed by abroad, % GDP	1	3.1.4	E-participation	66
5.2.4	Joint venture/strategic alliance deals/bn PPP$ GDP	3	3.2.3	Gross capital formation, % GDP	84
6.1.2	PCT patents by origin/bn PPP$ GDP	1	5.1.2	Firms offering formal training, %	81
6.3	Knowledge diffusion	2	5.3.1	Intellectual property payments, % total trade	64
6.3.4	ICT services exports, % total trade	1	7.1	Intangible assets	75
7.2.1	Cultural and creative services exports, % total trade	5	7.1.1	Trademarks by origin/bn PPP$ GDP	109
7.3.3	Wikipedia edits/mn pop. 15–69	1			
7.3.4	Mobile app creation/bn PPP$ GDP	1			

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ISRAEL EXPORT INSTITUTE

Israel is world's 6th Most Innovative Country, ahead of many advanced countries like the US, UK, and Japan

The Bloomberg Innovation Index 2020

World Most Innovative Economies

Innovation score

Lowest — Highest

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The Global Competitiveness Index 2018

WORLD ECONOMIC FORUM

12th Pillar: Innovation

Rank / 137 /	Country / Economy	Score	Trend	Distance from best
1	Switzerland	5.8		
2	United States	5.8		
3	Israel	5.8		
4	Finland	5.7		
5	Germany	5.6		
6	Netherlands	5.6		
7	Sweden	5.5		
8	Japan	5.4		
9	Singapore	5.3		
10	Denmark	5.1		

University-industry collaboration in R&D

Rank / 137 /	Country / Economy	Score	Trend	Distance from best
1	Switzerland	5.8		
2	United States	5.7		
3	Israel	5.7		
4	Finland	5.6		
5	Netherlands	5.6		
6	United Kingdom	5.4		
7	Germany	5.4		
8	Singapore	5.3		
9	Belgium	5.3		
10	Sweden	5.2		

Quality of scientific research institutions

Rank / 137 /	Country / Economy	Score	Trend	Distance from best
1	Switzerland	6.6		
2	United Kingdom	6.3		
3	Israel	6.3		
4	Netherlands	6.1		
5	United States	6.0		
6	Belgium	5.8		
7	France	5.8		
8	Finland	5.8		
9	Canada	5.7		
10	Australia	5.7		

Company spending on R&D

Rank / 137 /	Country / Economy	Score	Trend	Distance from best
1	Switzerland	6.1		
2	United States	5.9		
3	Israel	5.8		
4	Germany	5.6		
5	Japan	5.6		
6	Sweden	5.6		
7	Finland	5.3		
8	Netherlands	5.2		
9	Belgium	5.2		
10	Taiwan, China	5.2		

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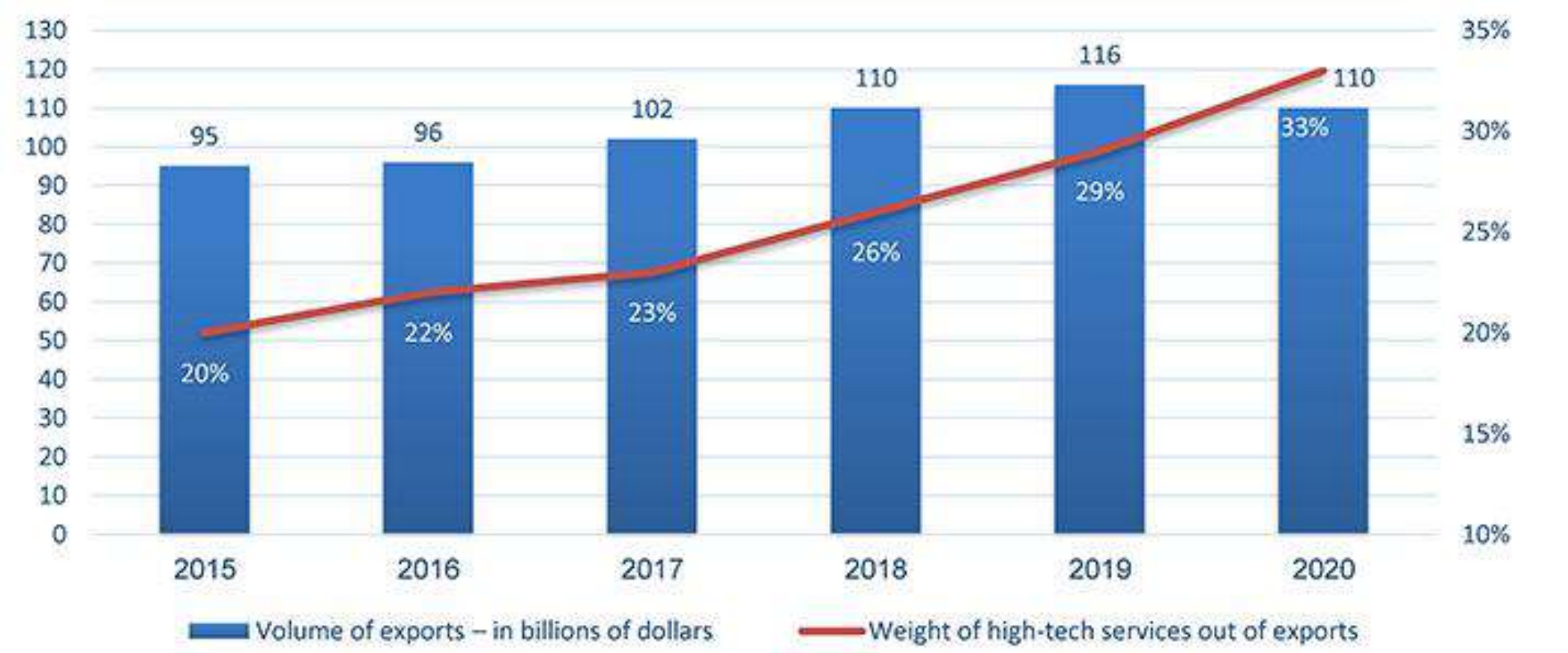
volume of exports and the weight of high-tech companies

40



Source: The Export Institute, 2020

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Economic Outlook for Israel

OECD Economic Outlook, Volume 2021 Issue 1 - © OECD 2021

Israel	2017 Current prices NIS billion	2018	2019	2020	2021	2022
		Percentage changes, volume (2015 prices)				
GDP at market prices	1 269.4	3.6	3.4	-2.5	5.0	4.5
Private consumption	694.6	3.6	3.8	-9.5	9.7	6.5
Government consumption	286.5	3.9	2.8	2.7	-0.6	0.0
Gross fixed capital formation	262.9	5.3	2.4	-4.7	6.1	3.8
Final domestic demand	1 244.1	4.0	3.3	-5.6	6.3	4.4
Stockbuilding[1]	10.2	-0.6	0.2	0.7	0.1	0.0
Total domestic demand	1 254.2	3.4	3.5	-4.9	6.5	4.2
Exports of goods and services	366.1	6.6	4.0	0.1	7.6	5.9
Imports of goods and services	350.9	6.3	4.1	-8.0	12.8	4.9
Net exports[1]	15.2	0.1	0.0	2.2	-0.9	0.5
Memorandum items						
GDP deflator	_	1.2	2.3	1.1	1.3	1.2
Consumer price index	_	0.8	0.8	-0.6	1.0	1.0
Core inflation index[2]	_	0.6	0.7	-0.1	0.8	0.9
Unemployment rate (% of labour force)	_	4.0	3.8	4.3	5.5	5.0
General government financial balance (% of GDP)	_	-3.6	-3.9	-12.1	-8.2	-6.2
General government gross debt (% of GDP)	_	60.9	60.0	72.9	76.9	79.0
Current account balance (% of GDP)	_	2.7	3.1	4.9	4.1	4.3

FORECAST

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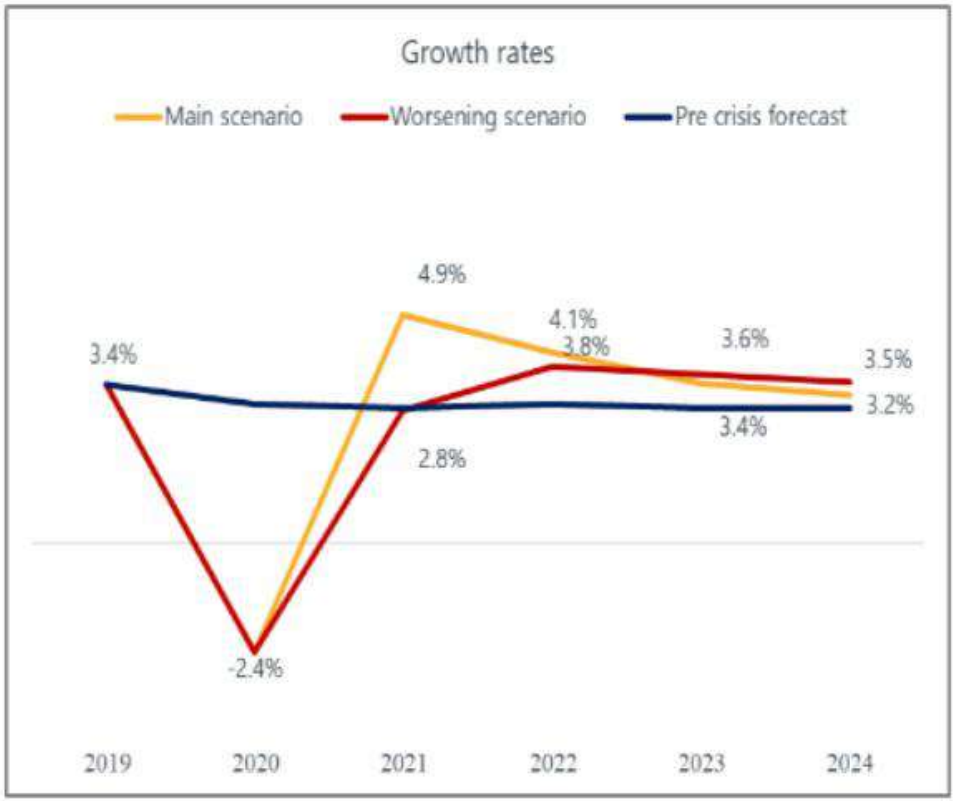
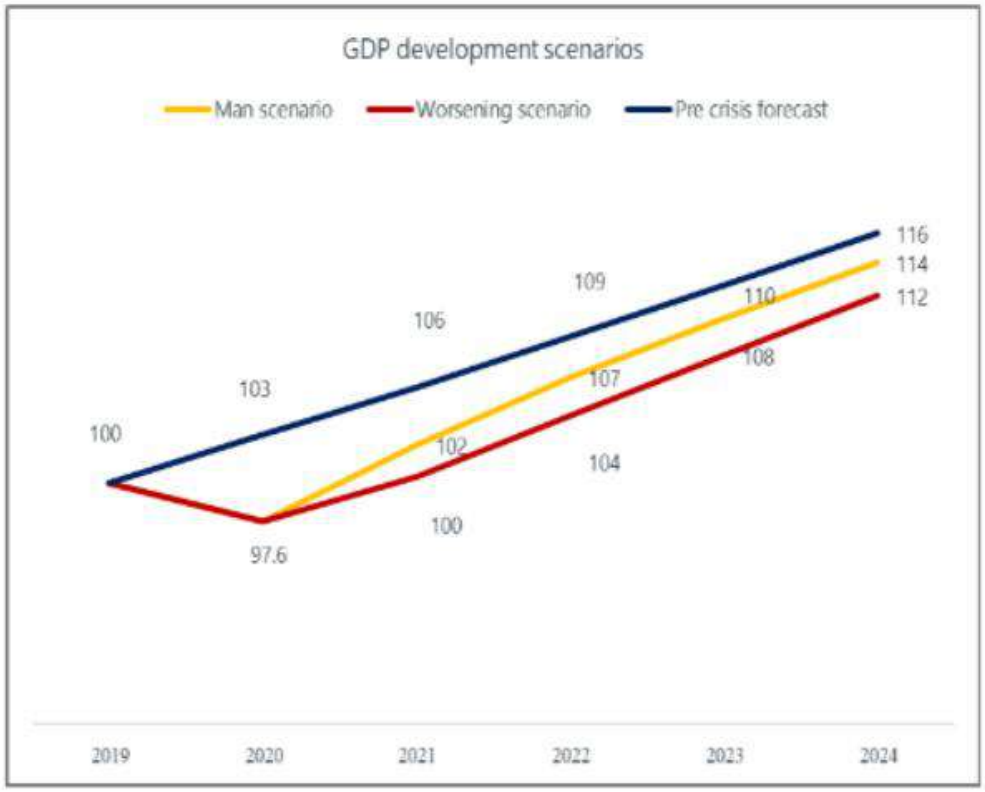
Economic Outlook for Israel





Ministry of Finance

The Chief Economist

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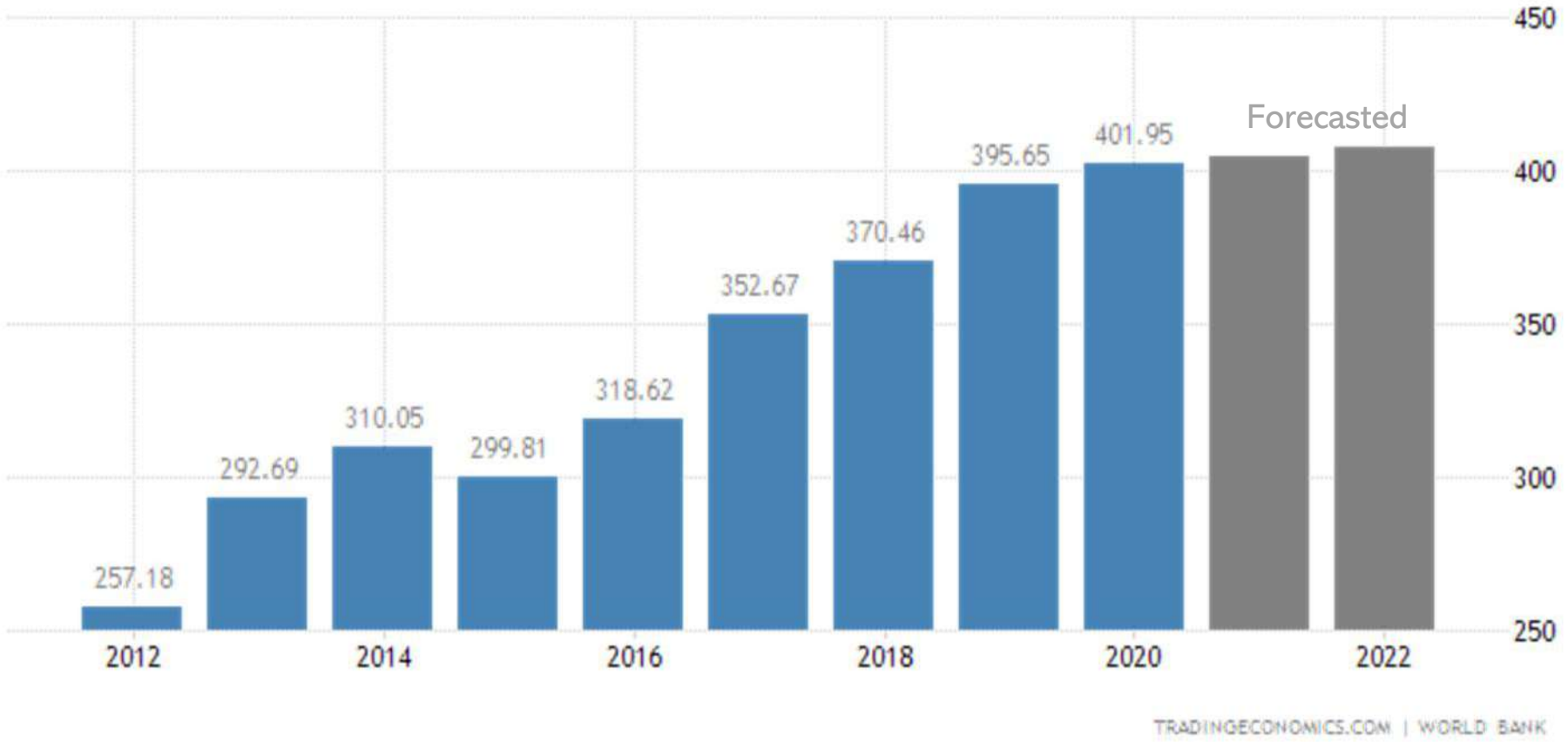
The GDP in Israel was worth 401.95 billion US dollars in 2020, The GDP value of Israel represents 0.36 percent of the world economy

43



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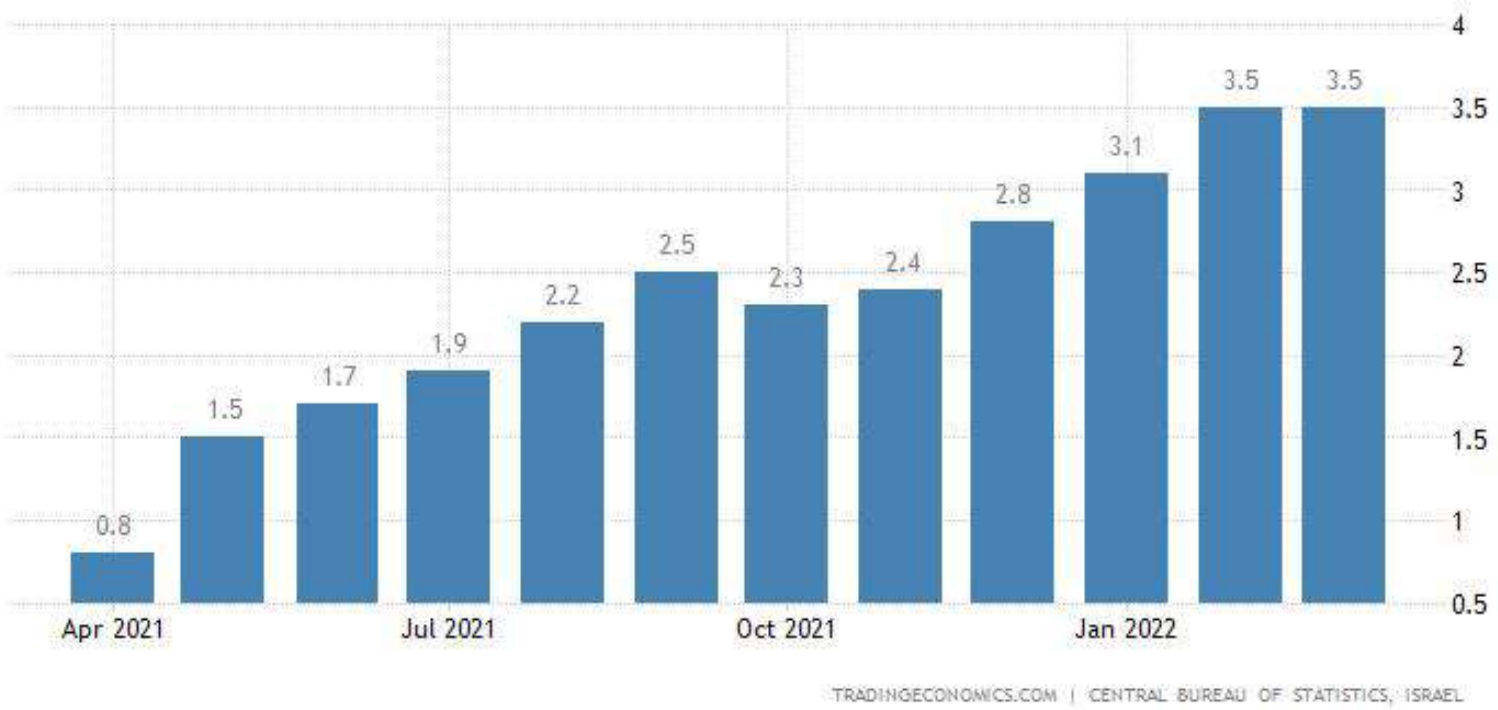
Israel Inflation Rate

44



Israel's annual inflation rate was at 3.5 percent in March of 2022, remaining steady from the previous month and above the Bank of Israel's annual target range for inflation of 1 percent to 3 percent.

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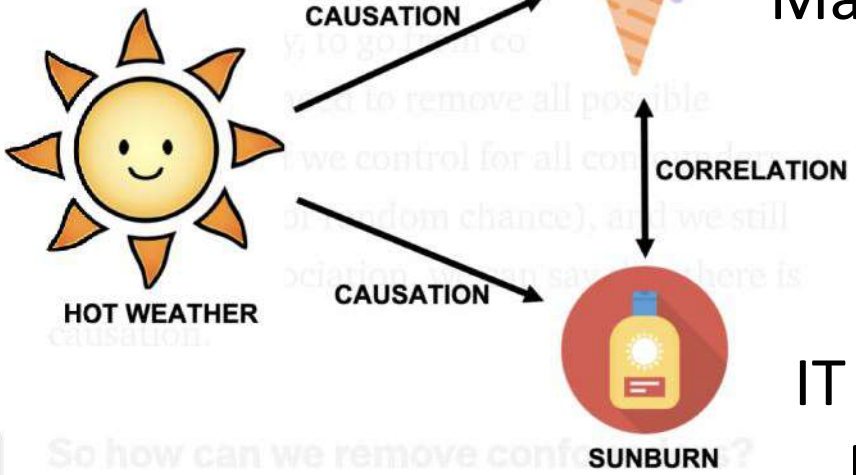
How we check our results

State of the Economy Index (%change)

Business Tendency Survey



IT Market

IT Company Budgets

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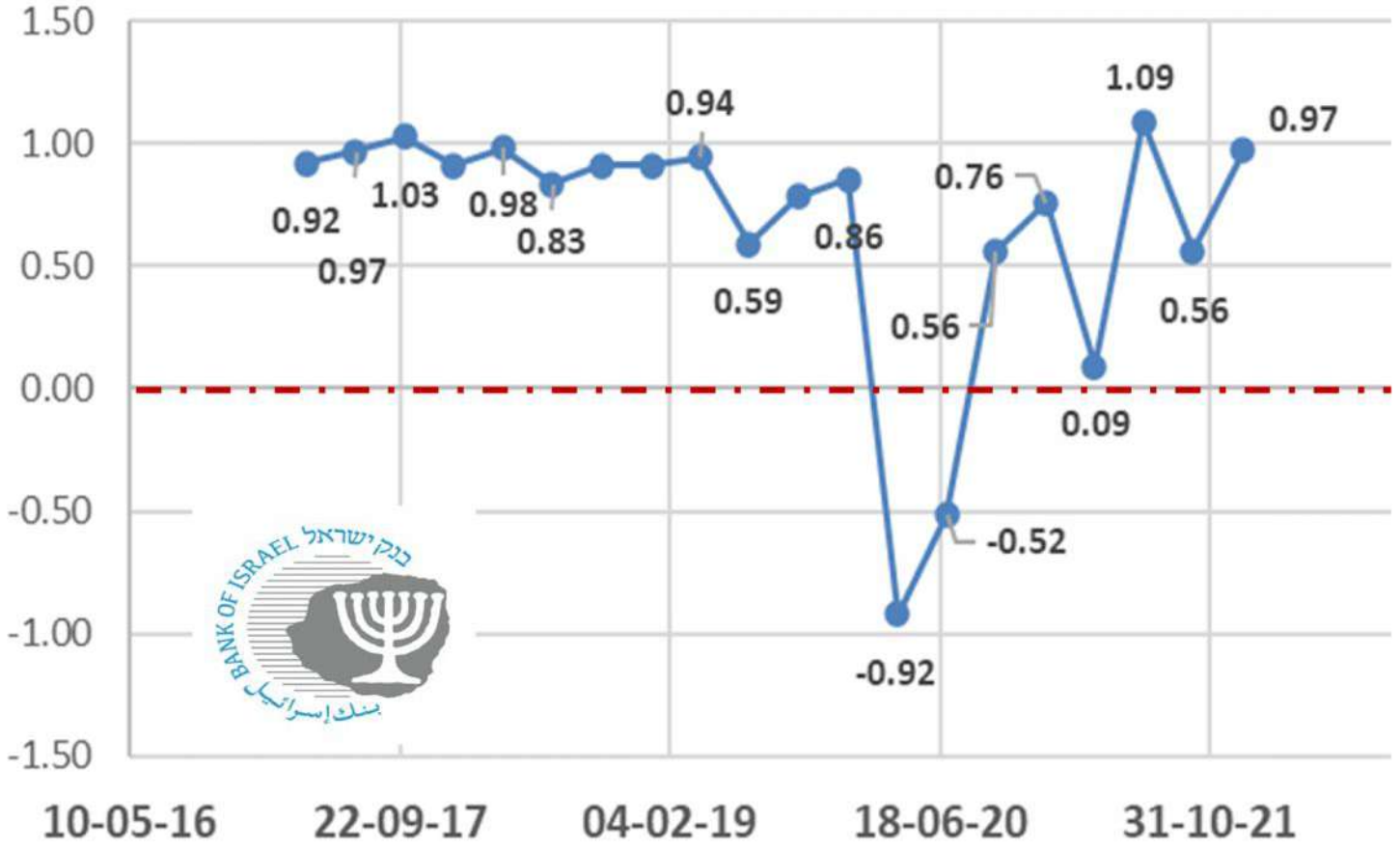
"State of the Economy Index" 46

State of the Economy Index

reflects the economy's *difficulty in increasing the volume of production*, (low supply of qualified workers) so the country needs to provide a larger share of the demand from outside sources



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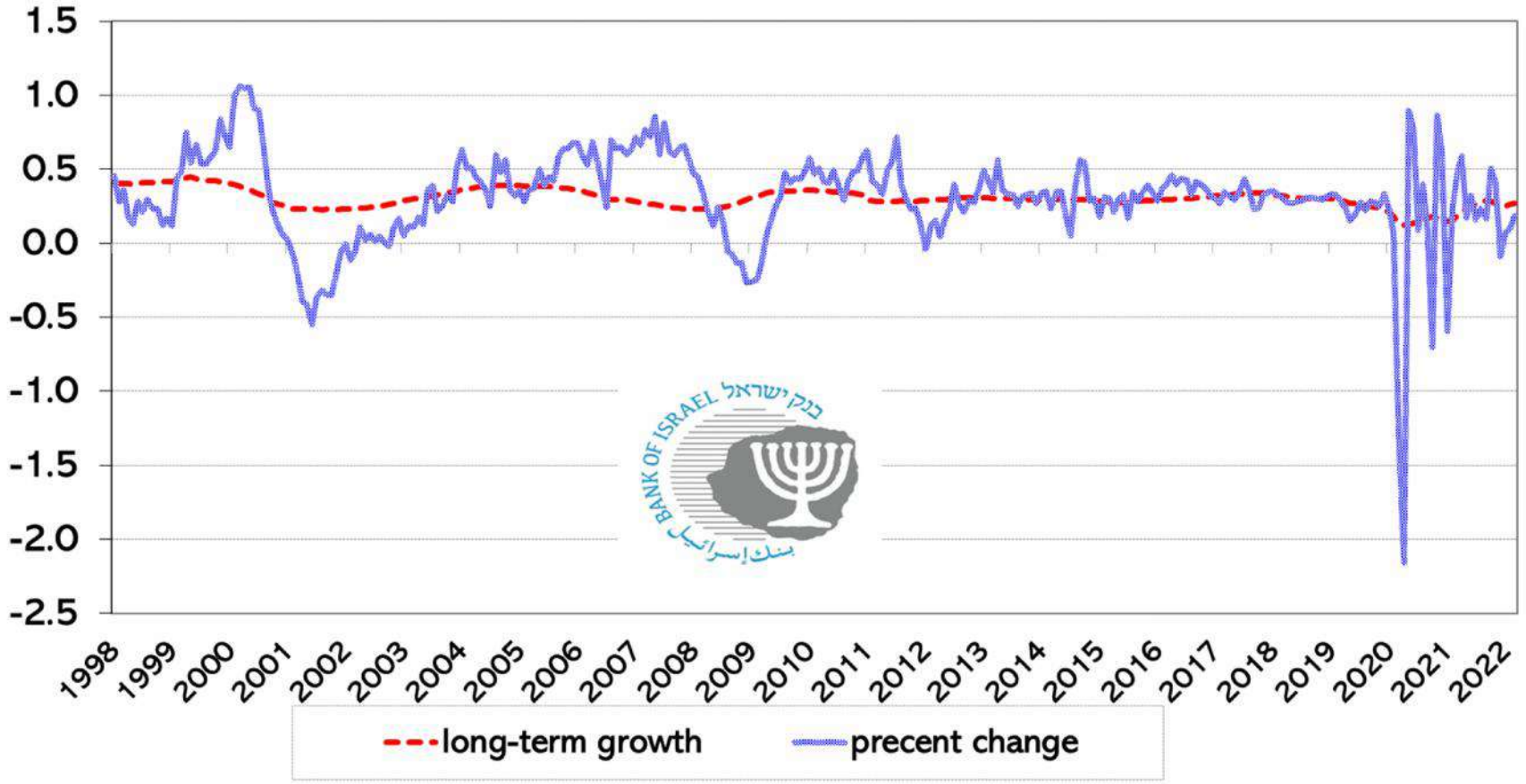
State of the Economy Index – Percentage Points Change

47



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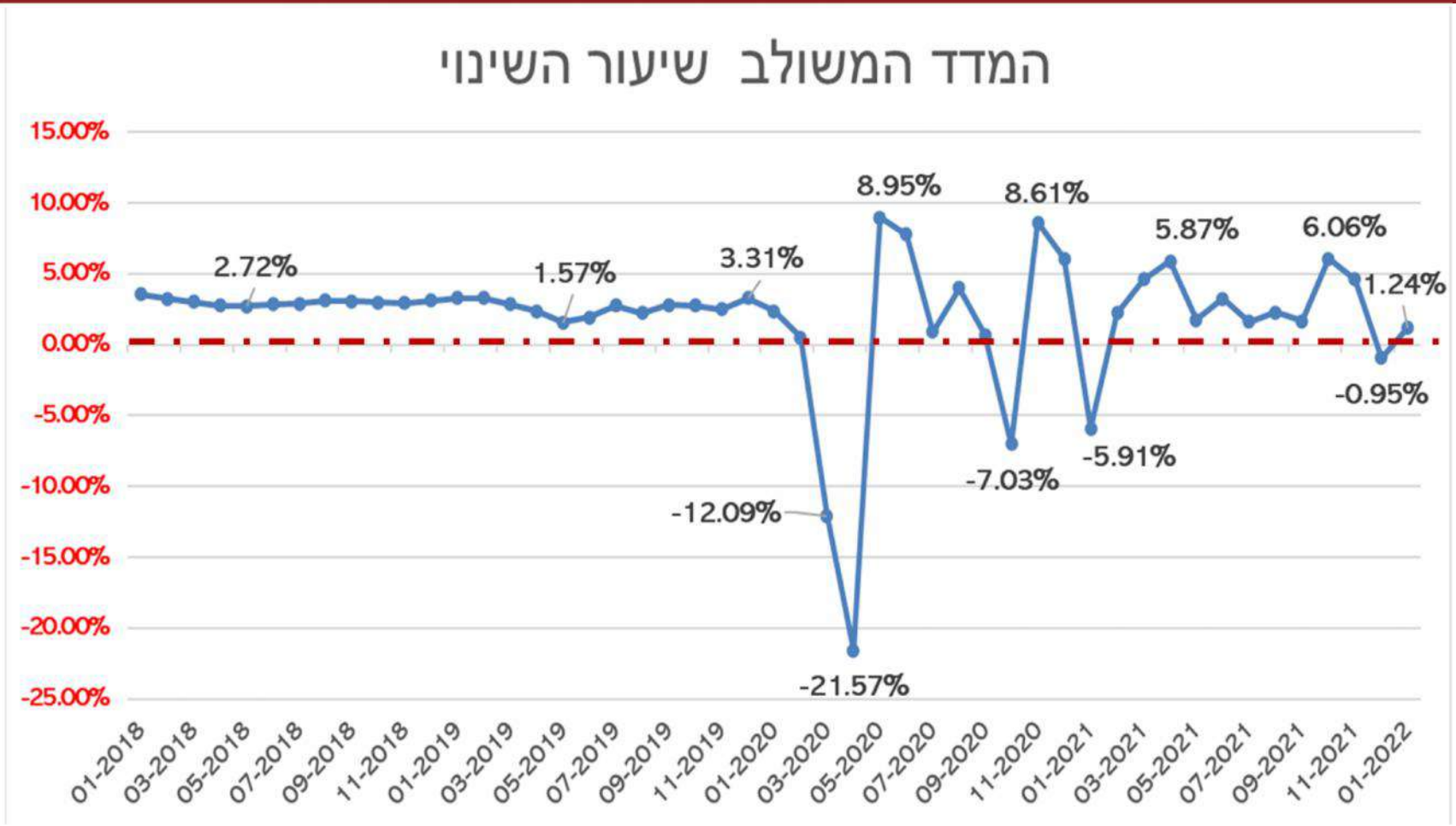
% bi-monthly change : "State of the Economy Index" 48



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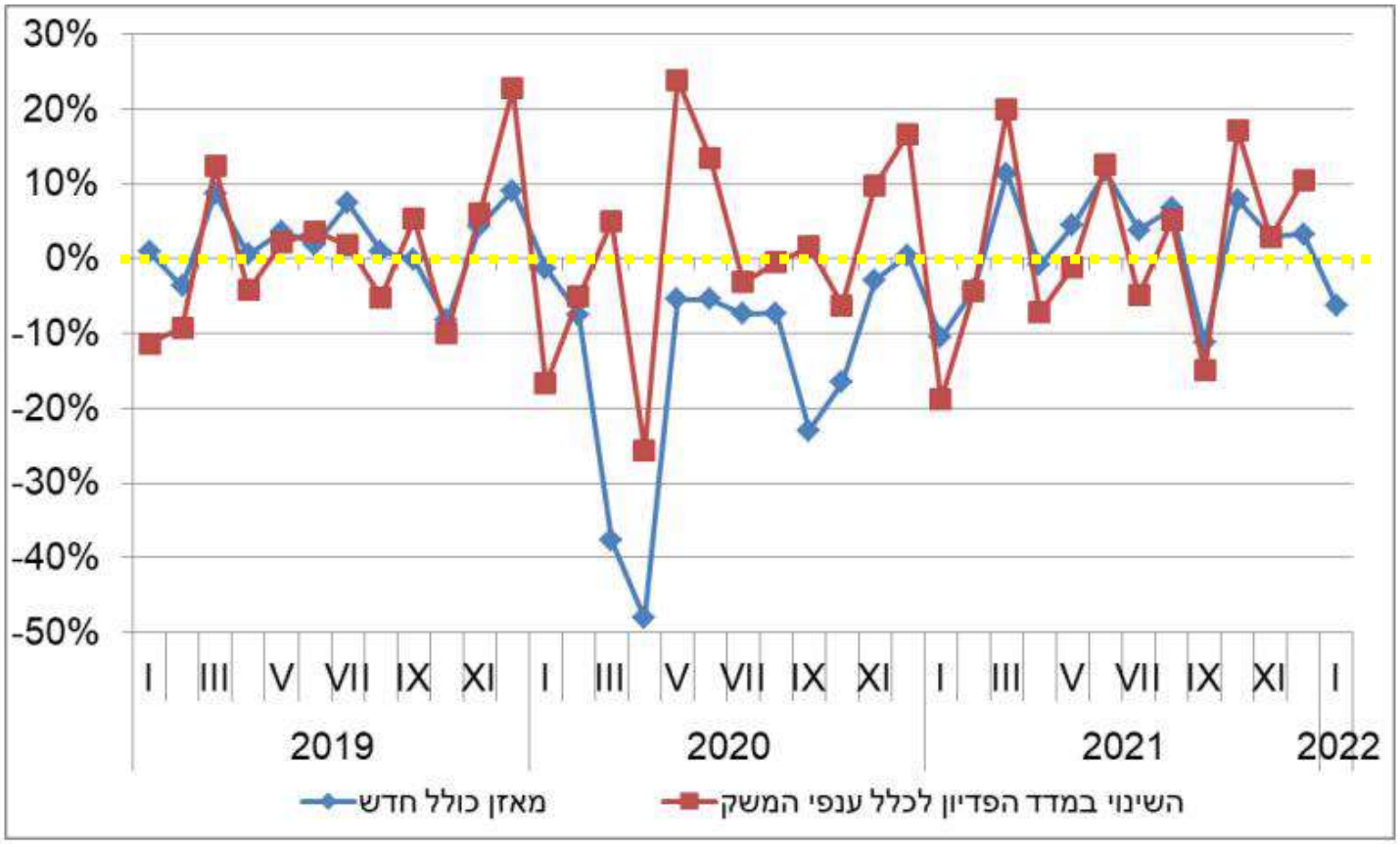
Business Tendency Survey - April 2022



BTS measures the level of optimism that executives have about current and expected developments regarding production, sales, demand, employment and changes in the USDILS exchange rate.

Central Bureau of Statistics

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Israel Economic Activity Chart

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March's reading was driven **by stronger imports of manufacturing inputs** in the month, as well as **healthier services revenue, retail trade revenue and industrial production** in February, as the impact of the pandemic subsided

Note: Month-on-month and year-on-year variations in %.

Source: Bank of Israel (BoI) and FocusEconomics calculations

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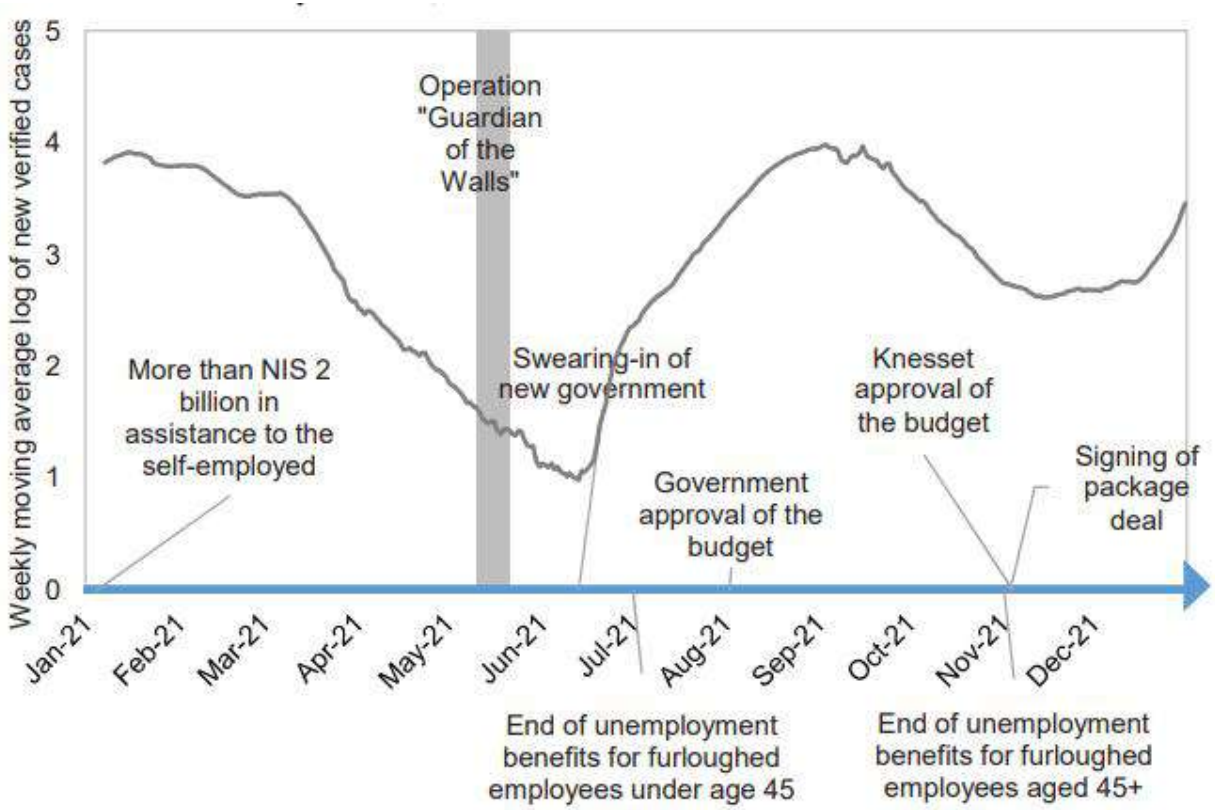
2021-22: main fiscal events in Israel



SOURCE: Based on "COVID-19 in Israel - General Picture (Dashboard)", Ministry of Health.

Unknown fiscal events 2022-23

New elections: ????

Knesset Approval of Budget 2023: ????

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Probability of Economic Slowdown

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Will the job market move from employee to employer ? 53

GLOBES

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Is the party over for Israel's tech sector?

TechCrunch

Featured Article

Post-pandemic reset leads to wave of layoffs in tech

It was a shitty week for tech workers

Amanda Silberling, Natasha Mascarenhas / 10:17 PM GMT+3 • May 6, 2022

Cost cuts, layoffs hit tech startups amid economic ripples

Georgina Gonzalez (Twitter) - 16 hours ago

Save Post Tweet Share Listen Text Size Print Email

Economic headwinds are disrupting the high growth bubbles tech startups have created, forcing them to implement serious cost-cutting strategies like layoffs and sometimes even closure, *The New York Times* reported May 11.

Fear and Loathing Return to Tech Start-Ups

The New York Times

Workers are dumping their stock, companies are cutting costs, and layoffs abound as troubling economic forces hit tech start-ups.

The startup language of layoffs

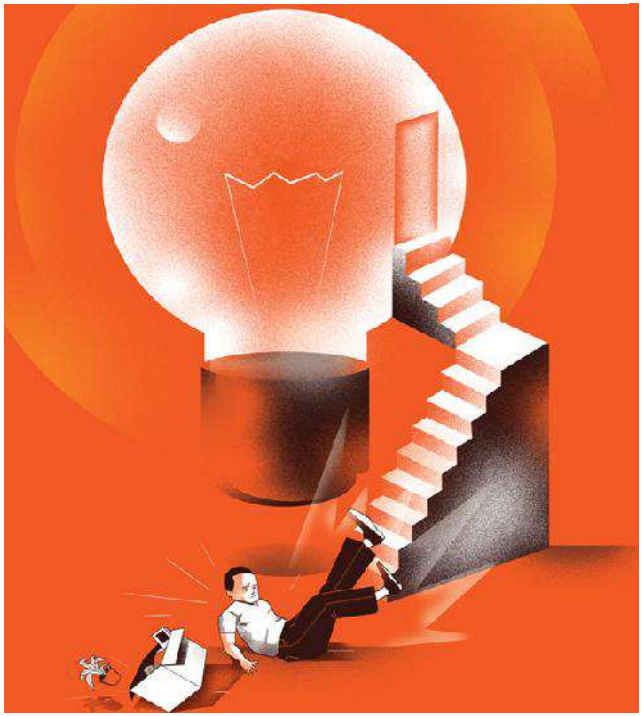
Forbes INDIA

From a funding boom to mass layoffs, a look at what has led to around 5,700 employees being rendered jobless across major Indian startups in the last three months

אנשים ומחשבים

חדשות

רשות החדשנות מזהירה: למרות שנת שיא בהיי-טק החגיגה עלולה להסתיים



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Will the job market move from employee to employer ? 54

The hits keep coming: Plummeting tech giants turn focus to profitability and streamlining in turbulent times

CTECH by CALCALIST

Following the collapse in technology stocks, the Israeli representatives on Wall Street changed their tone and began to talk about profitability and efficiency instead of glorifying growth

Sophie Sulman 16:02, 19.05.22

TheMarker | TechNation

"גם המועמדים מבינים שהשכר לא תואם את מה שהם עושים, ויודעים שזה עומד להתפוצץ"

המגייסות של חברות ההשמה זיהו את הסימנים הראשונים להתקררות בחברות ההיי־טק
הפרטיות כבר לפני כמה חודשים ■ אף שהמשכורת שלהן מבוססת על עמלות משכר
המועמדים, גם להן כבר נמאס ■ "רגיעה בהיי-טק תחזיר את שיווי המשקל לעולם התעסוקה"

ADVICE FOR STARTUPS IN A DOWNTURN (MAY 2022 EDITION)

Tech is entering a downturn. After a 13 year bull market run, anywhere you look in the stock...

vc|cafe

"The current crisis was predictable. This is not the big fall I experienced in the past. I already went through the internet bubble burst in 2000, the banking crisis in 2008, and the market crash due to the pandemic in March 2020, it is not the end of the world, it's an opportunity" "

Safra Catz, CEO of Oracle

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Why no 2023 & 2024 forecasts ?

55

given "all" the political and economic signals we couldn't forecast 2023 or 2024 with an acceptable margin of error

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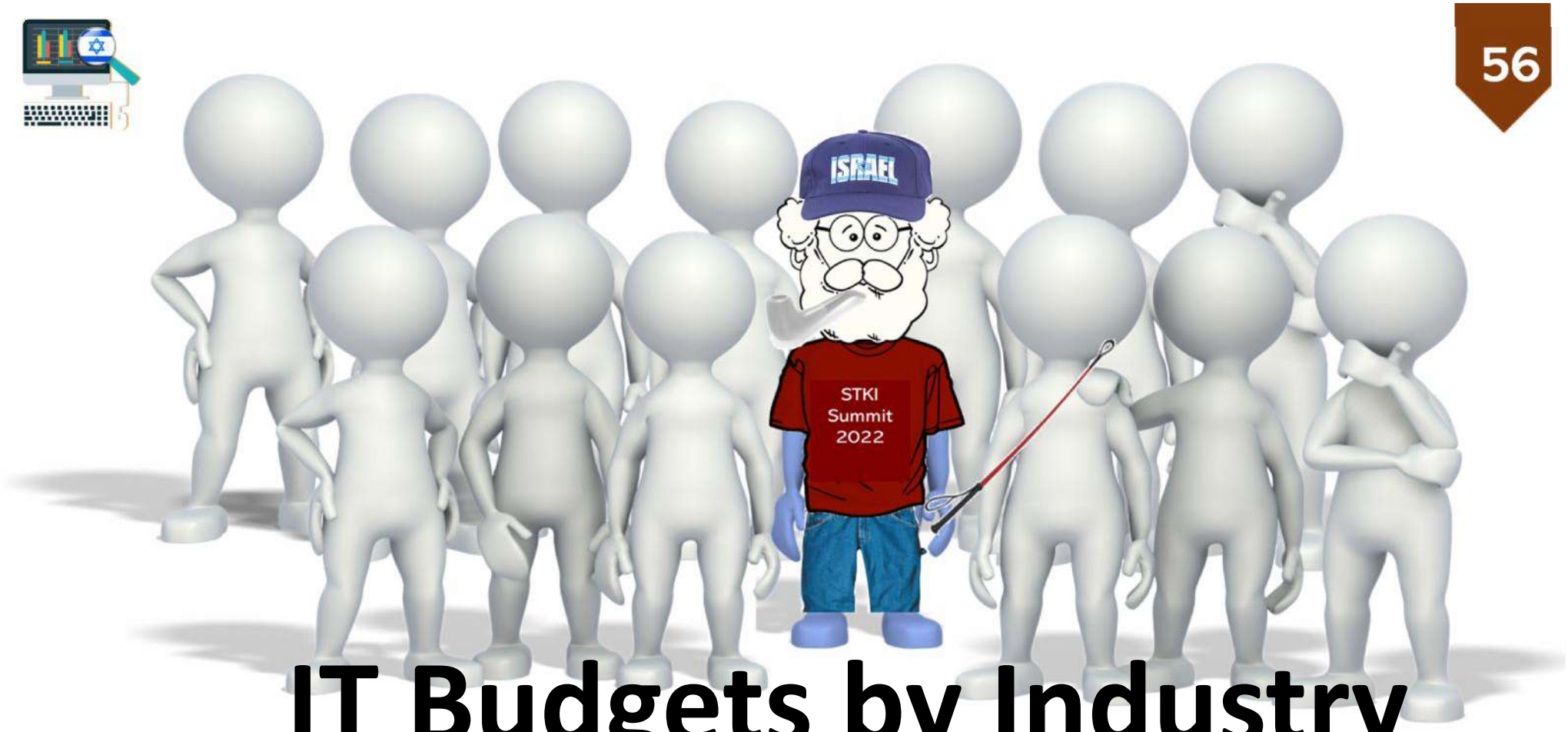

IT Budgets by Industry

(companies transitioning to the cloud)

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Number of Companies (including government) and sizes

57

number of employees	2016	2017	2018	2019	2020	2021				number of employees
	number of companies (paying taxes)	number of companies (paying taxes)	number of companies (paying taxes)	number of companies (paying taxes)	number of companies (paying taxes)	number of companies (paying taxes)	& of TOTAL	subtotals		
251+	1,622	1,796	1,711	1,696	1,498	1,712	0.59%	4,375		over 101
101-250	2,752	2,817	2,708	2,738	2,173	2,663	0.92%			
21-100	17,995	18,470	4,725	4,849	3,554	4,701	1.63%	4,701	4,701	51-100
6-20	52,265	52,970	38,857	38,760	30,938	38,532	13.36%	38,532	279,442	up to 50
up to 5	192,641	197,928	231,609	235,210	234,128	240,910	83.50%	240,910		
totals	267,275	273,981	279,610	283,253	272,291	288,518				totals
	ACCORDING TO BITUACH LEUMI 2/2017	ACCORDING TO BITUACH LEUMI 2/2018	ACCORDING TO BITUACH LEUMI 2/2019	ACCORDING TO BITUACH LEUMI 2/2020	ACCORDING TO BITUACH LEUMI 2/2021	ACCORDING TO BITUACH LEUMI 4/2022				

המוסד לביטוח לאומי

cloud, cloud, cloud, cloud..... 58

1250 companies/ organizations with IT departments most of them will introduce hybrid cloud solutions

most companies with older versions ERP CRM IT that will migrate to "cloud first" solutions

SMBs that will make sure that they have all IT as "cloud" solutions

number of employees	number of companies (paying taxes)	& of TOTAL
251+	1,712	0.59%
101-250	2,663	0.92%
21-100	4,701	1.63%
6-20	38,532	13.36%
up to 5	240,910	83.50%

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IT BUDGETS (cash-out NOT opex/capex accounting)include *some* other expenses

industry	Budgets 2018	change from 2018	Budgets 2019	change from 2019	Budgets 2020	change from 2020	Budgets 2021	change from 2021	Budgets 2022	% total	Market size	% total	industry
government	$1,630	5.95%	$1,727	-16.04%	$1,450	4.14%	$1,510	16%	$1,750	17%	$3,420	33.20%	public
security	$525	2.29%	$537	2.42%	$550	5.45%	$580	17%	$680	7%			
education	$292	4.45%	$305	14.75%	$350	17.14%	$410	15%	$470	5%			
health	$350	-2.86%	$340	14.71%	$390	15.38%	$450	16%	$520	5%			
utilities	$215	-2.33%	$210	11.90%	$235	6.38%	$250	4%	$260	3%	$810	7.79%	utilities/ transport
transport	$340	7.35%	$365	10.96%	$405	11.11%	$450	22%	$550	5%			
banks	$920	10.87%	$1,020	-6.86%	$950	-3.16%	$920	7%	$980	9%	$2,045	19.67%	financial
insurance	$405	3.70%	$420	3.57%	$435	3.45%	$450	8%	$485	5%			
fin other	$310	29.03%	$400	12.50%	$450	13.33%	$510	14%	$580	6%			
manuf	$875	-1.71%	$860	-2.33%	$840	7.14%	$900	-2%	$880	8%	$1,185	11.40%	manuf/ retail
retail	$238	-3.36%	$230	8.70%	$250	18.00%	$295	3%	$305	3%			
high tech	$842	7.01%	$901	38.73%	$1,250	32.00%	$1,650	9%	$1,800	17%	$1,982	19.06%	high tech/ IT
IT local vendors	$165	9.09%	$180	-2.78%	$175	2.86%	$180	1%	$182	2%			
telecomm	$230	13.04%	$260	-5.77%	$245	-6.12%	$230	-7%	$215	2%	$475	4.57%	telecomm / media
media	$180	11.11%	$200	15.00%	$230	8.70%	$250	4%	$260	3%			
SMB/SME	$410	-6.10%	$385	-11.69%	$340	17.65%	$400	20%	$480	5%	$480	4.62%	SMB
M USD	$7,927	5.21%	$8,340	2.46%	$8,545	10.42%	$9,435	10%	$10,397	100%	$10,397	100%	in M !

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Values in Million USD

industry	CHANGE FROM 2021
transport	22%
SMB/SME	20%
security	17%
government	16%
health	16%
education	15%
fin other	14%
high tech	9%
insurance	8%
banks	7%
utilities	4%
media	4%
retail	3%
IT local vendors	1%
manuf	-2%
telecomm	-7%

IT Budgets according to OPPORTUNITIES

all amounts in M $ USD

industry	Budget 2022
high tech	$1,800
government	$1,750
banks	$980
manuf	$880
security	$680
fin other	$580
transport	$550
health	$520
insurance	$485
SMB/SME	$480
education	$470
retail	$305
utilities	$260
media	$260
telecomm	$215
IT local vendors	$182

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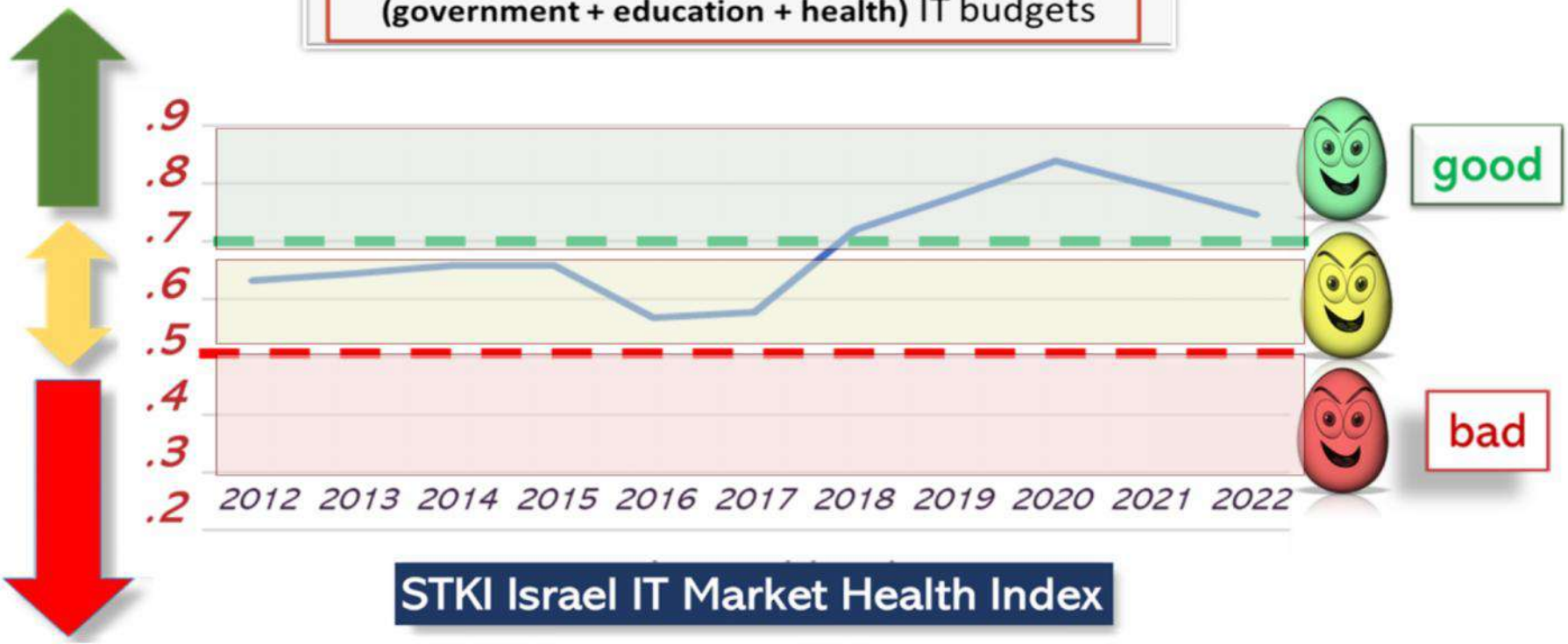
STKI IT Market Health Index

over 1 excellent, ove .70 good,
under .70 bad and under .50 a recesion

(banks + insurance + fin other) IT budgets
divided by
(government + education + health) IT budgets



STKI Israel IT Market Health Index

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ISRAEL IT MARKET 2014-2022

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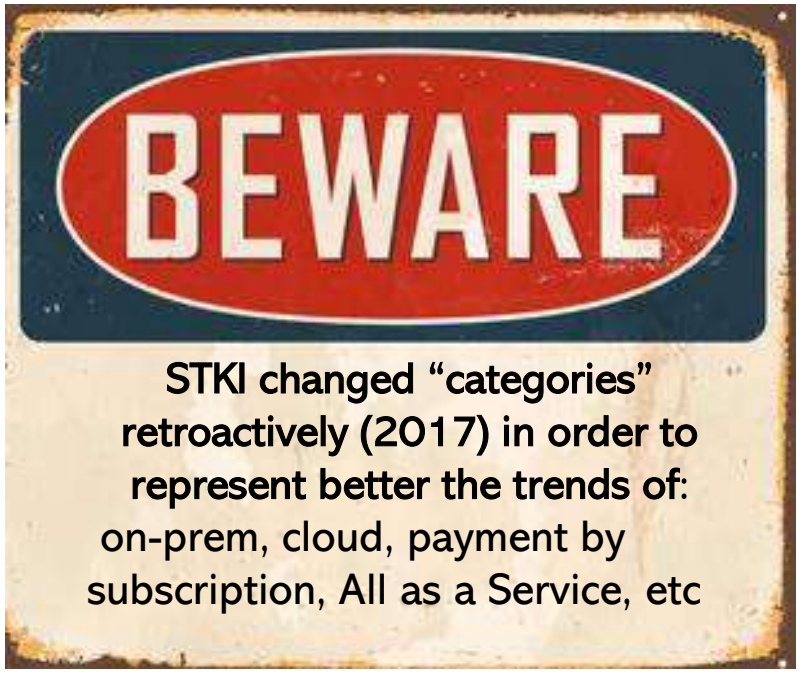

	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total IT market	6,353,028	6,493,030	6,639,382	6,954,684	6,795,150	7,488,300	7,597,000	8,390,500	9,426,500
% change		2.20%	2.25%	4.75%	-2.29%	10.20%	1.45%	10.44%	12.35%

Values in Million USD

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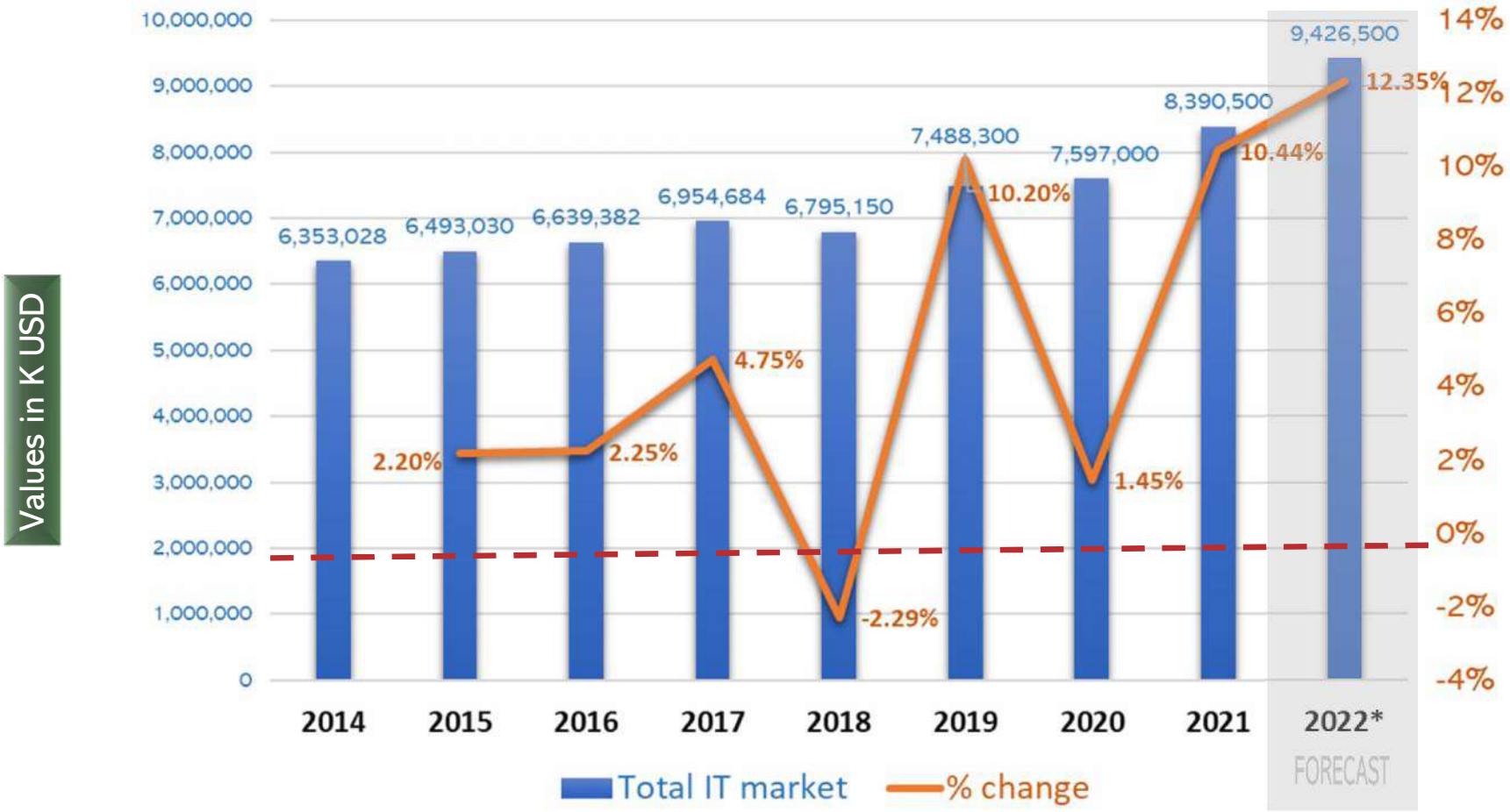
IT Market (K USD) 2014-2022



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Israeli IT Market (K USD) 2014-2022

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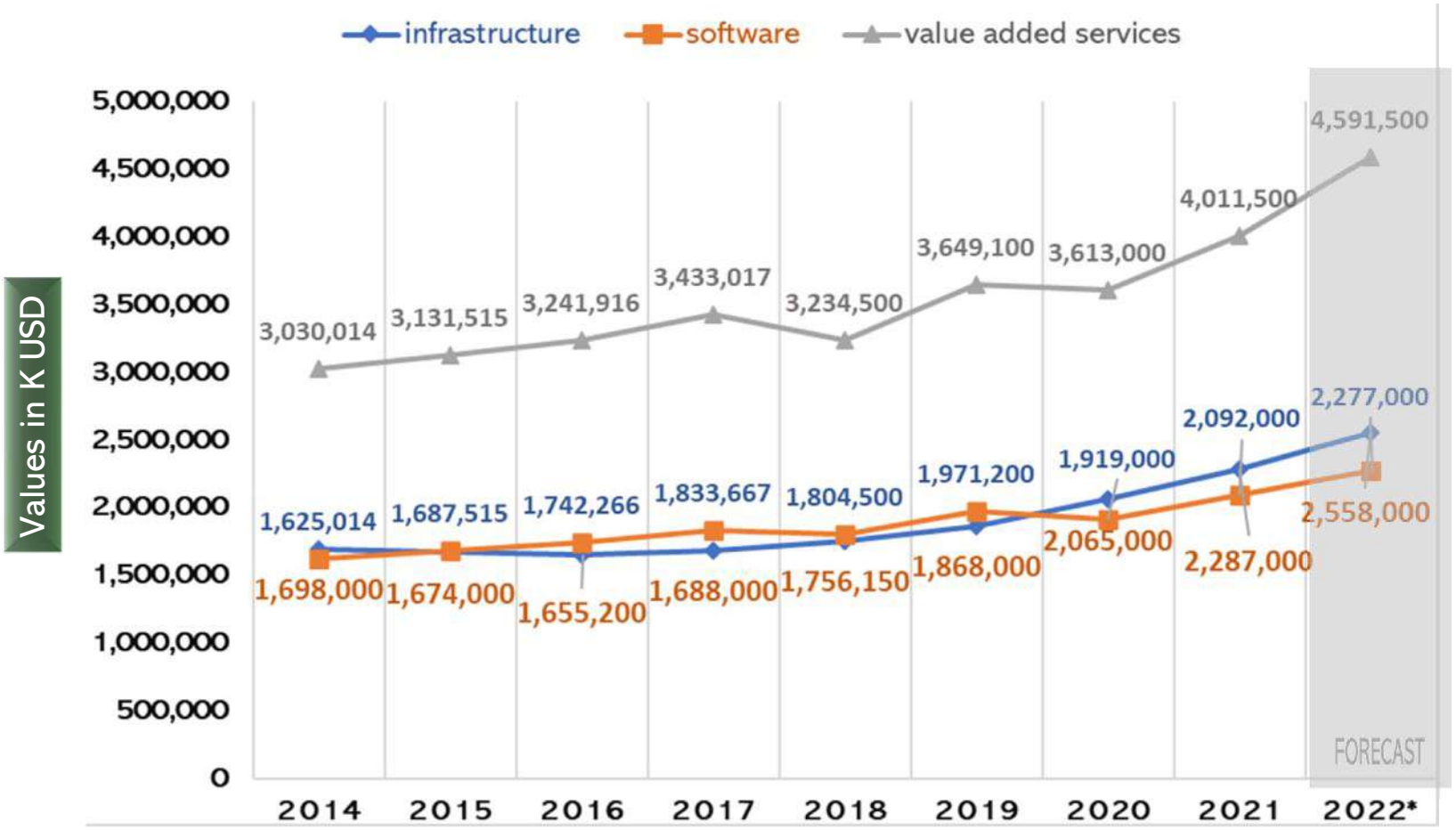

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Israeli IT Market (% change) 2014-2022

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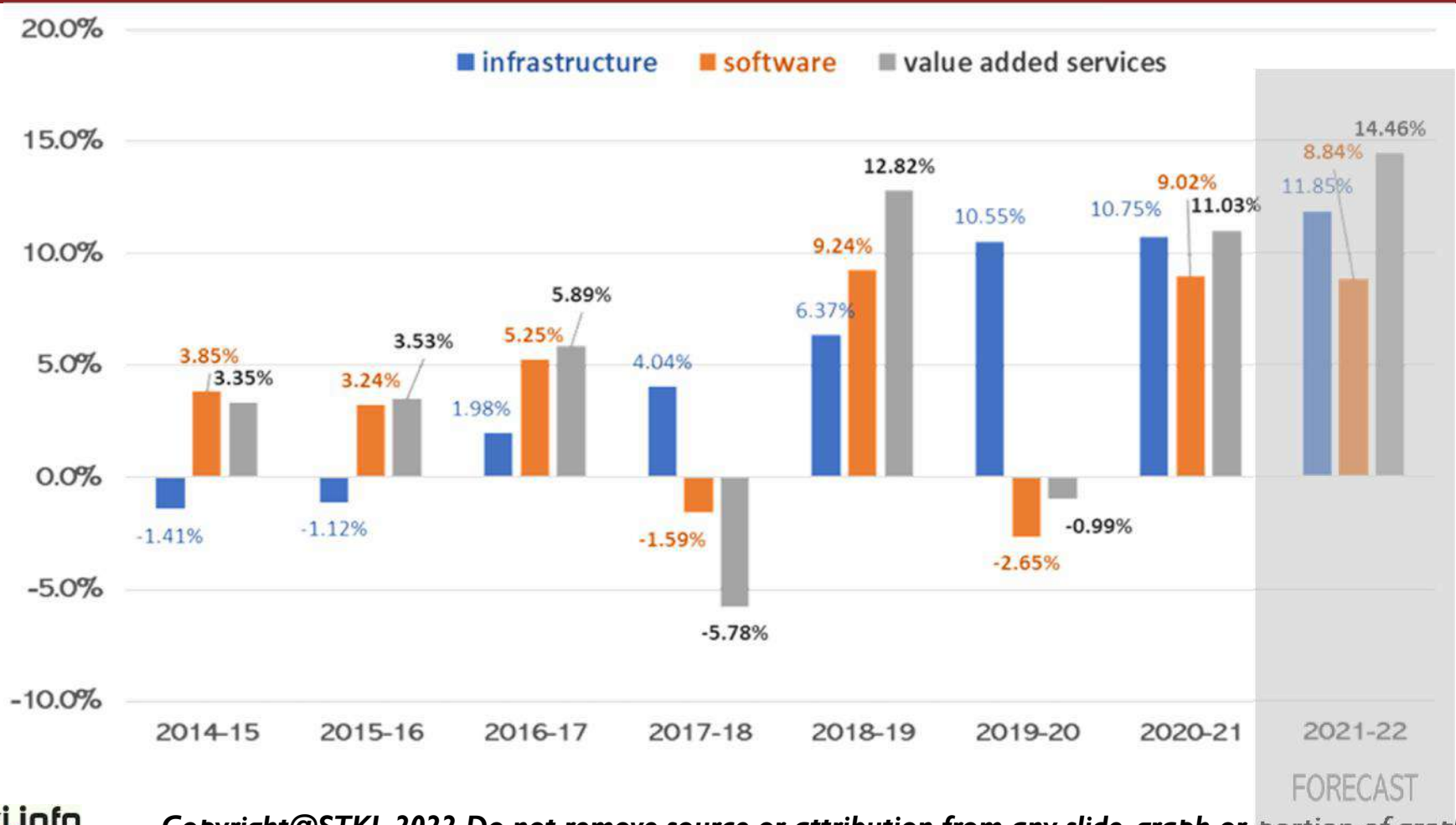

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Infrastructure Market

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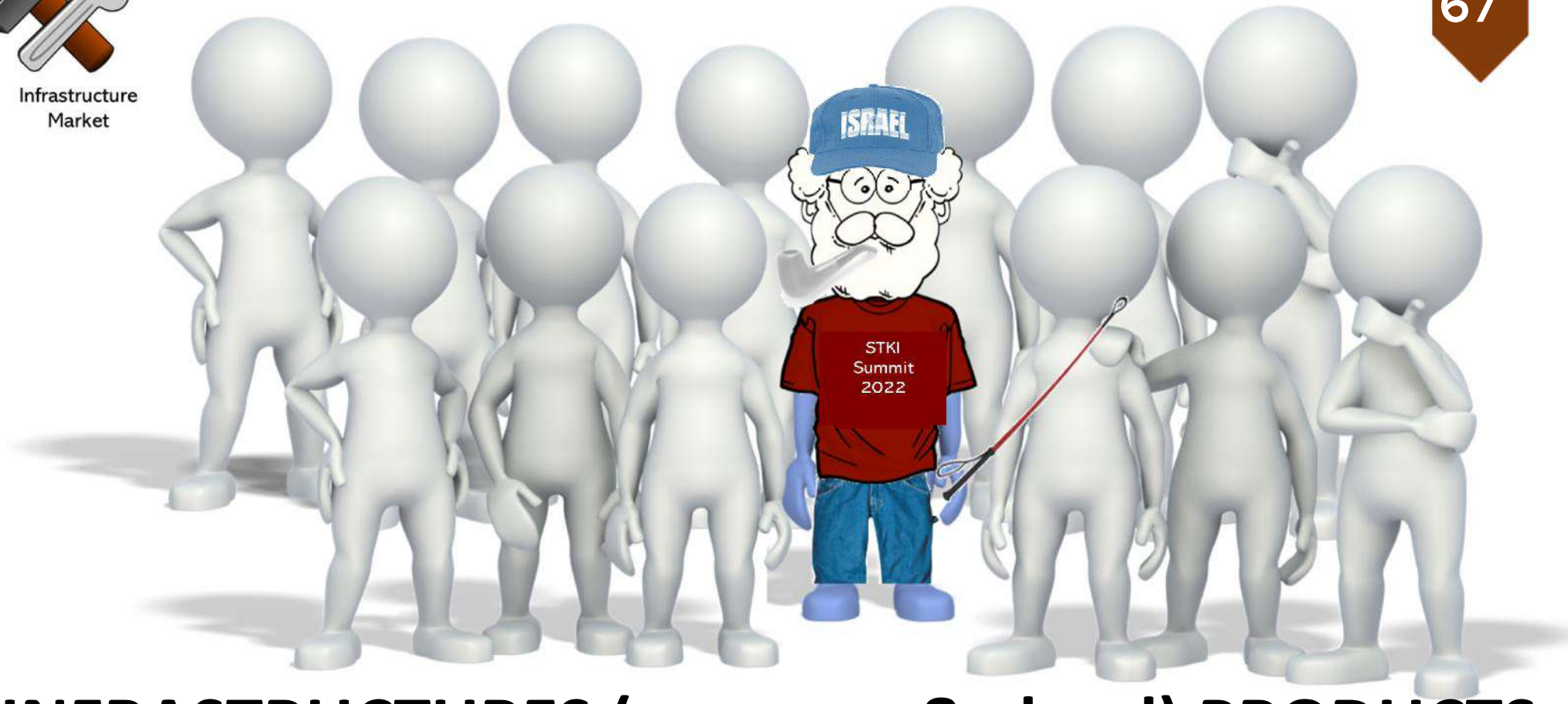

INFRASTRUCTURES (on-prem & cloud) PRODUCTS

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Infrastructure Market

Hardware (Infrastructure) Market 2014-2022

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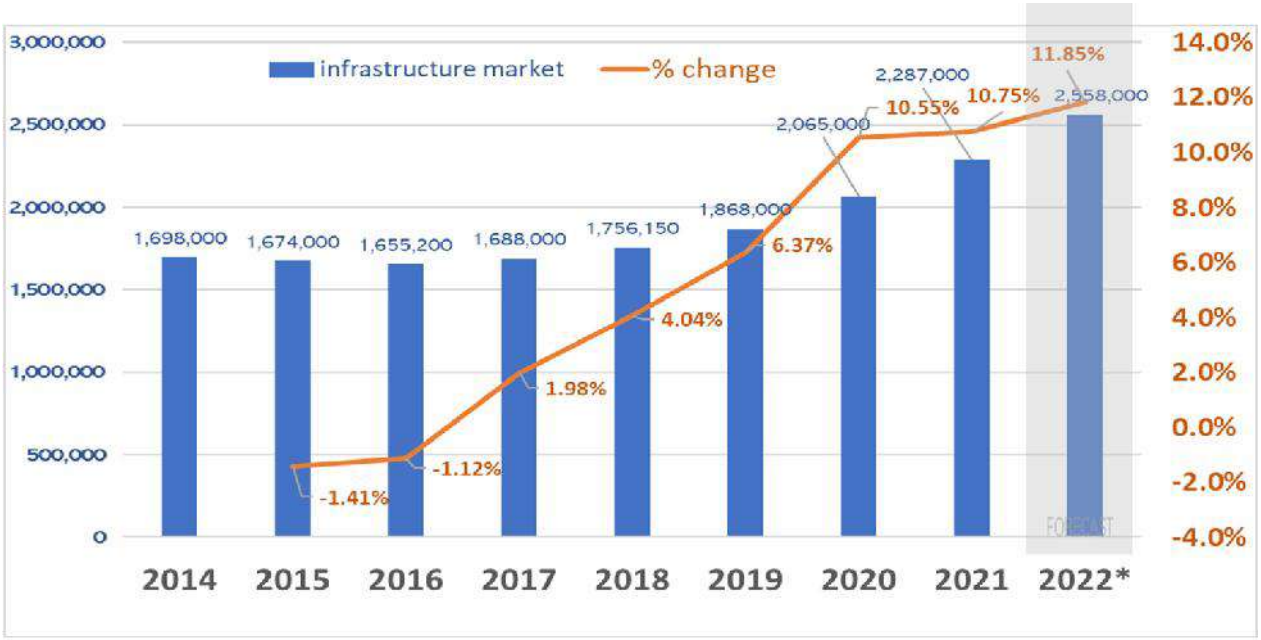

infrastructure market	2014	2015	2016	2017	2018	2019	2020	2021	2022*
	1,698,000	1,674,000	1,655,200	1,688,000	1,756,150	1,868,000	2,065,000	2,287,000	2,558,000
% change		-1.41%	-1.12%	1.98%	4.04%	6.37%	10.55%	10.75%	11.85%

Values in K USD

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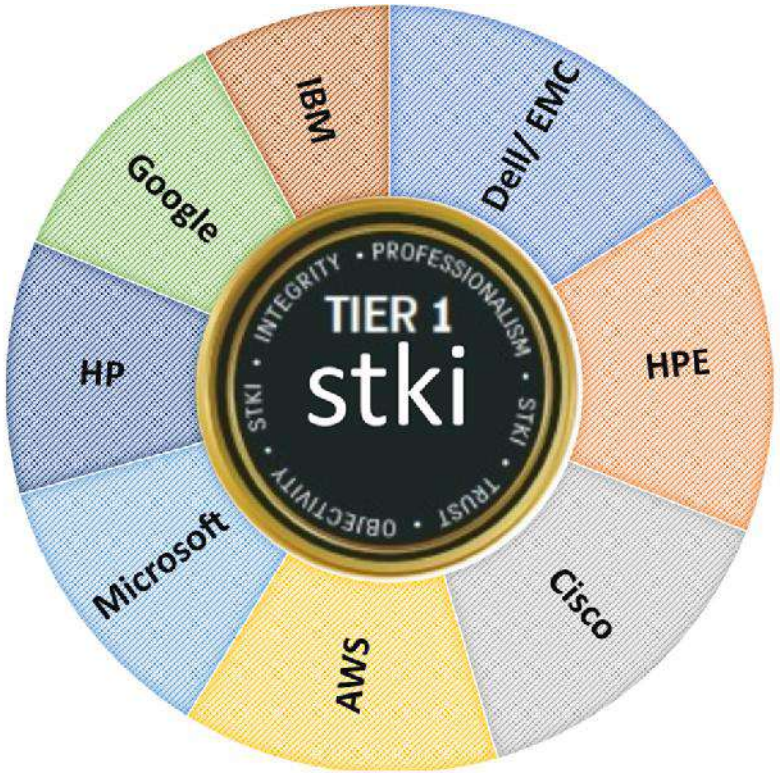
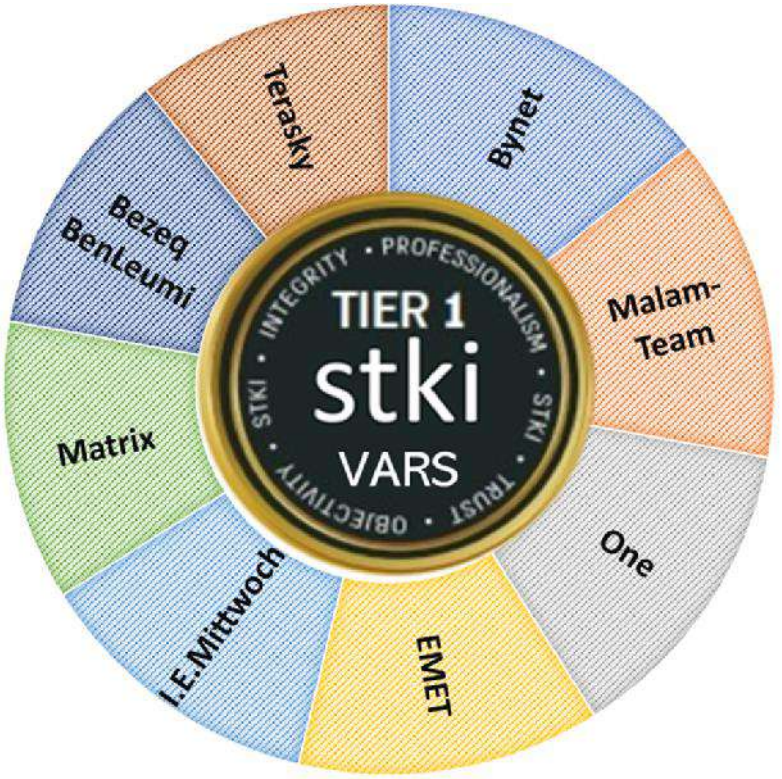
Infrastructure Market

TOP VENDORS: Hardware-Infrastructure Markets 69

Infrastructure Suppliers



Infrastructure VARS



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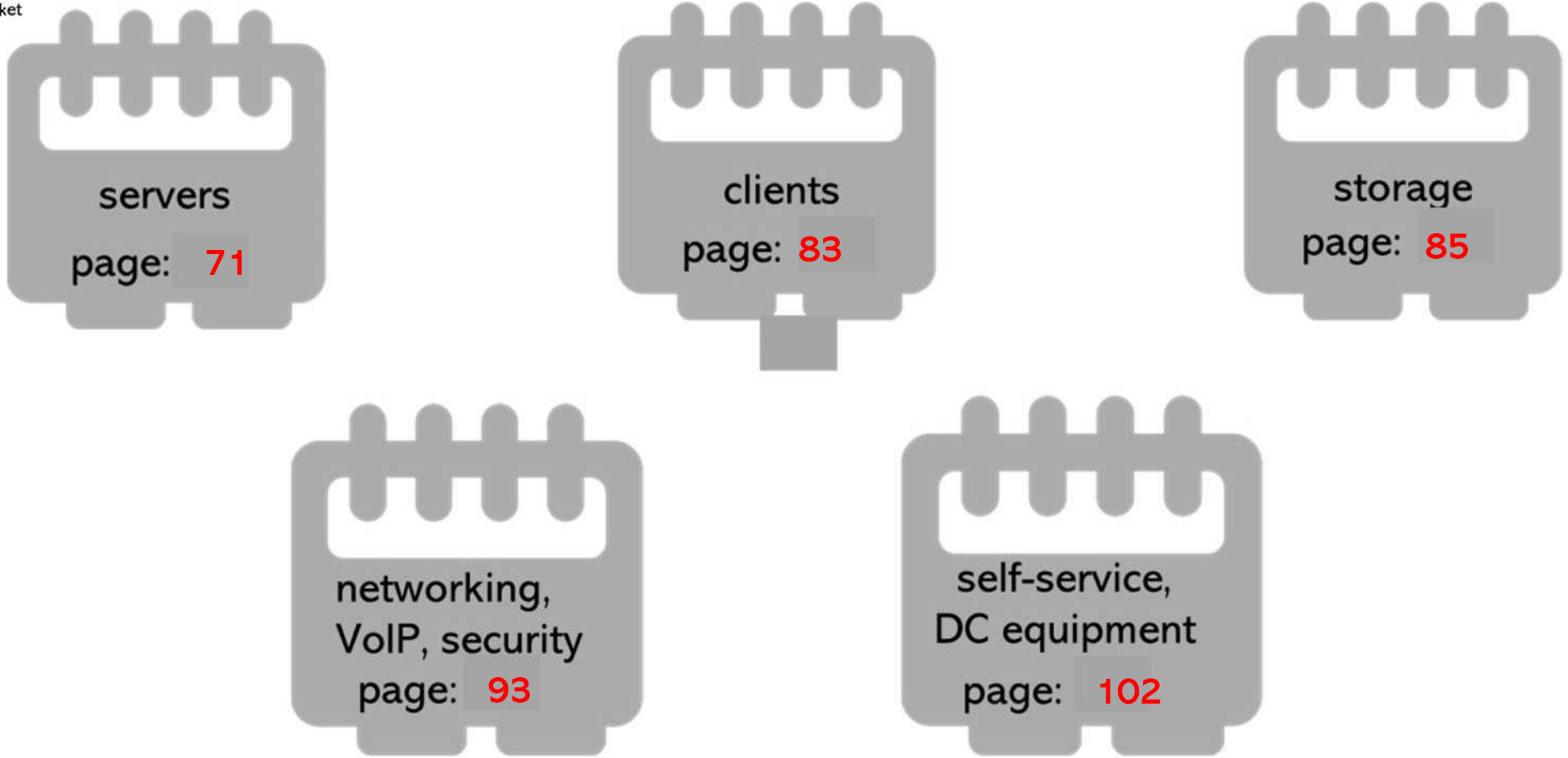
Infrastructure Market

Infrastructure Categories (pages) 70



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SERVER MARKET 2018-2022

71

	2018		2019		2020	0.05%	2021		2022
servers X86	$305.00	1.64%	$310.00	-6.45%	$290.00	10.34%	$320.00	3.75%	$332.00
Legacy (non-x86)	$32.00	-4.69%	$30.50	-14.75%	$26.00	19.23%	$31.00	12.90%	$35.00
Data Appliances	$13.00	15.38%	$15.00	-13.33%	$13.00	-15.38%	$11.00	-9.09%	$10.00
HCI appliances	$36.00	25.00%	$45.00	24.44%	$56.00	25.00%	$70.00	21.43%	$85.00
Public Cloud IaaS PaaS (Compute as a Service)	$130.00	30.77%	$170.00	17.65%	$200.00	30.00%	$260.00	38.46%	$360.00
TOTALS	$516.00	10.56%	$570.50	2.54%	$585.00	18.29%	$692.00	18.79%	$822.00

Values in Million USD

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Infrastructure Market

SERVERS X86

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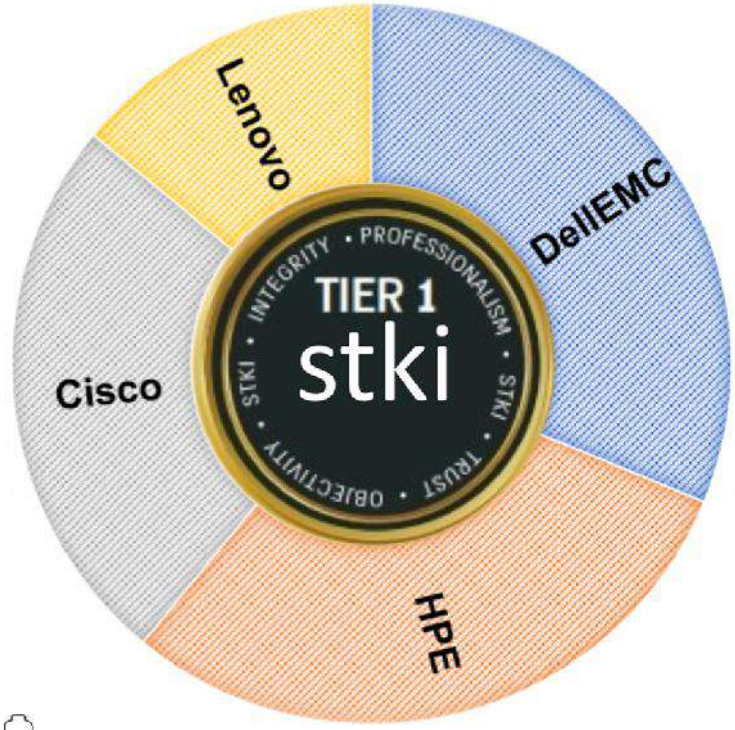

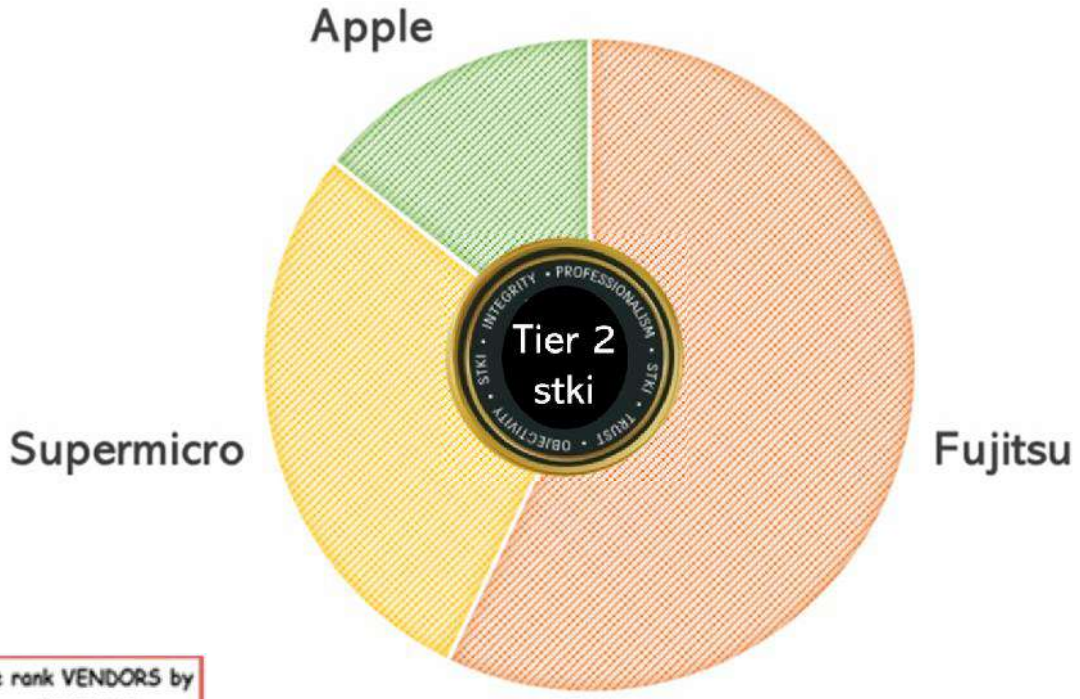

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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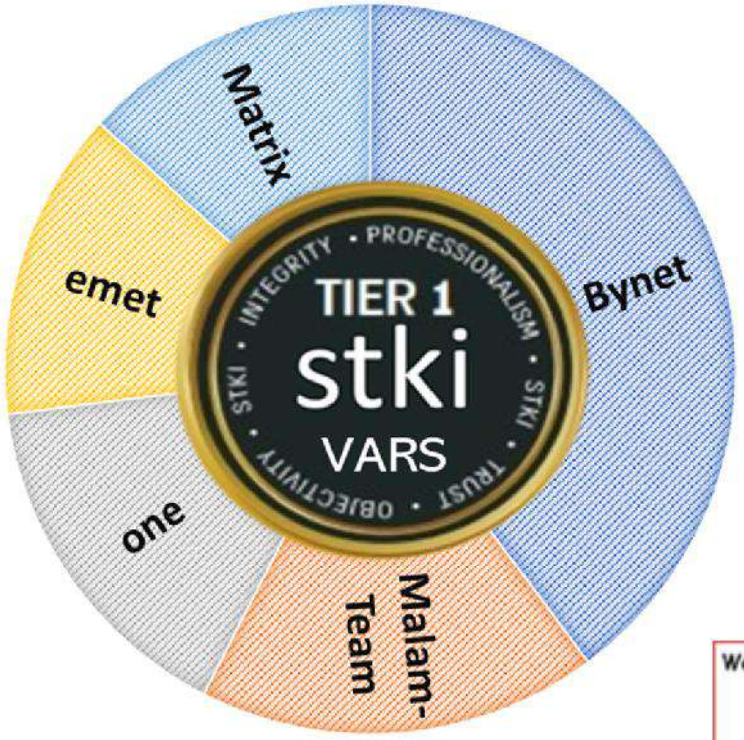
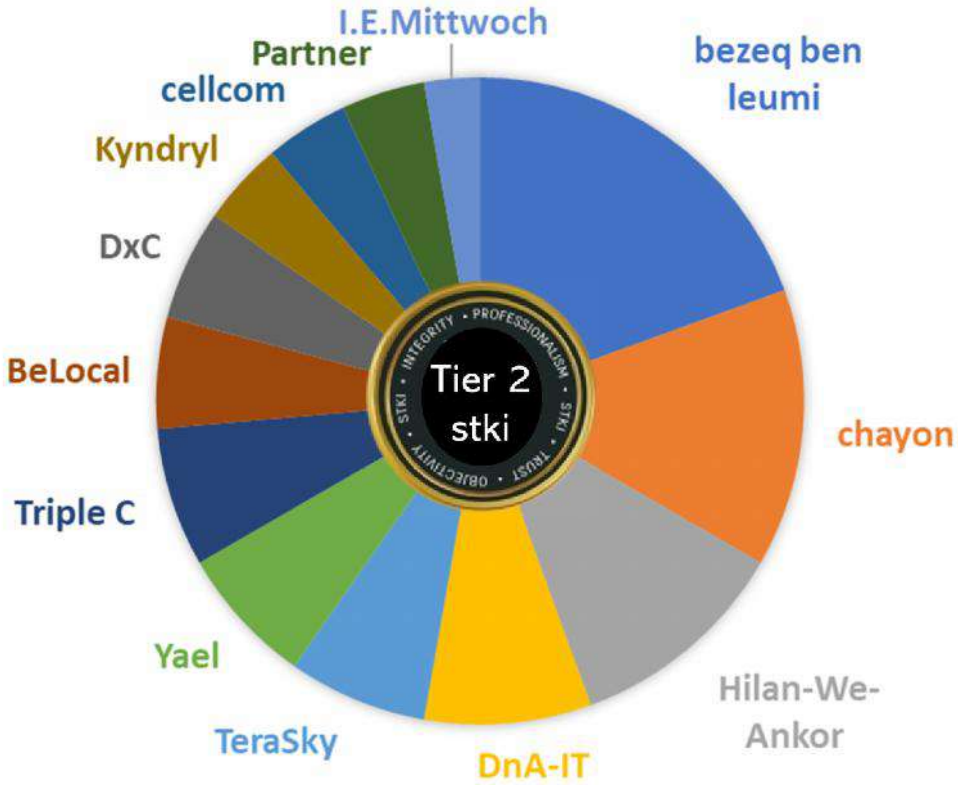
Infrastructure Market

SERVERS X86 VARs 73



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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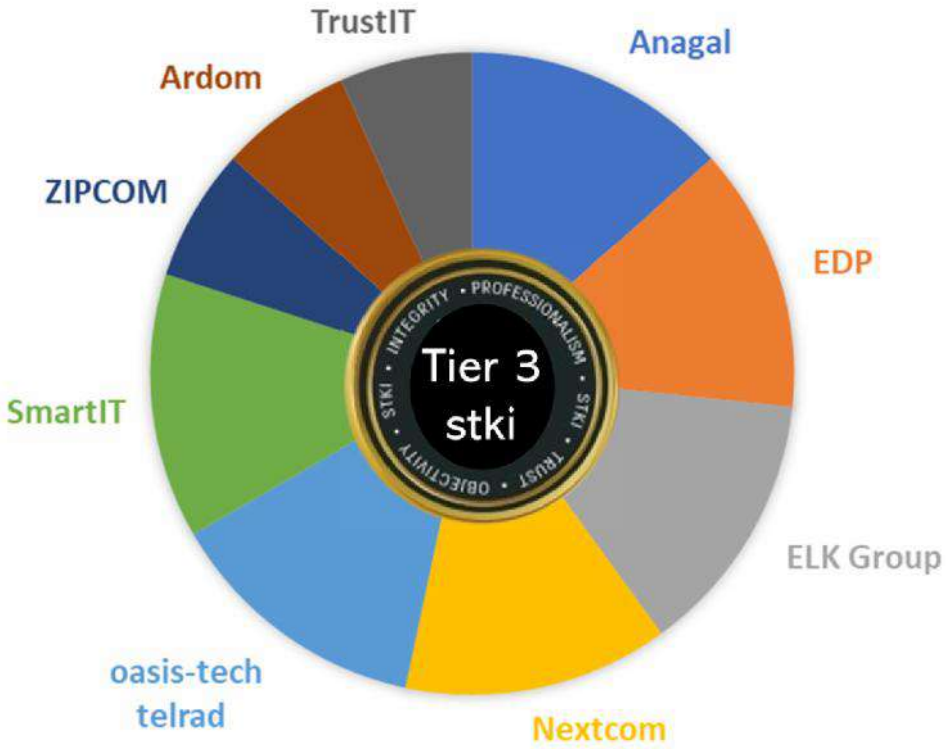
SERVERS X86 VARs 74



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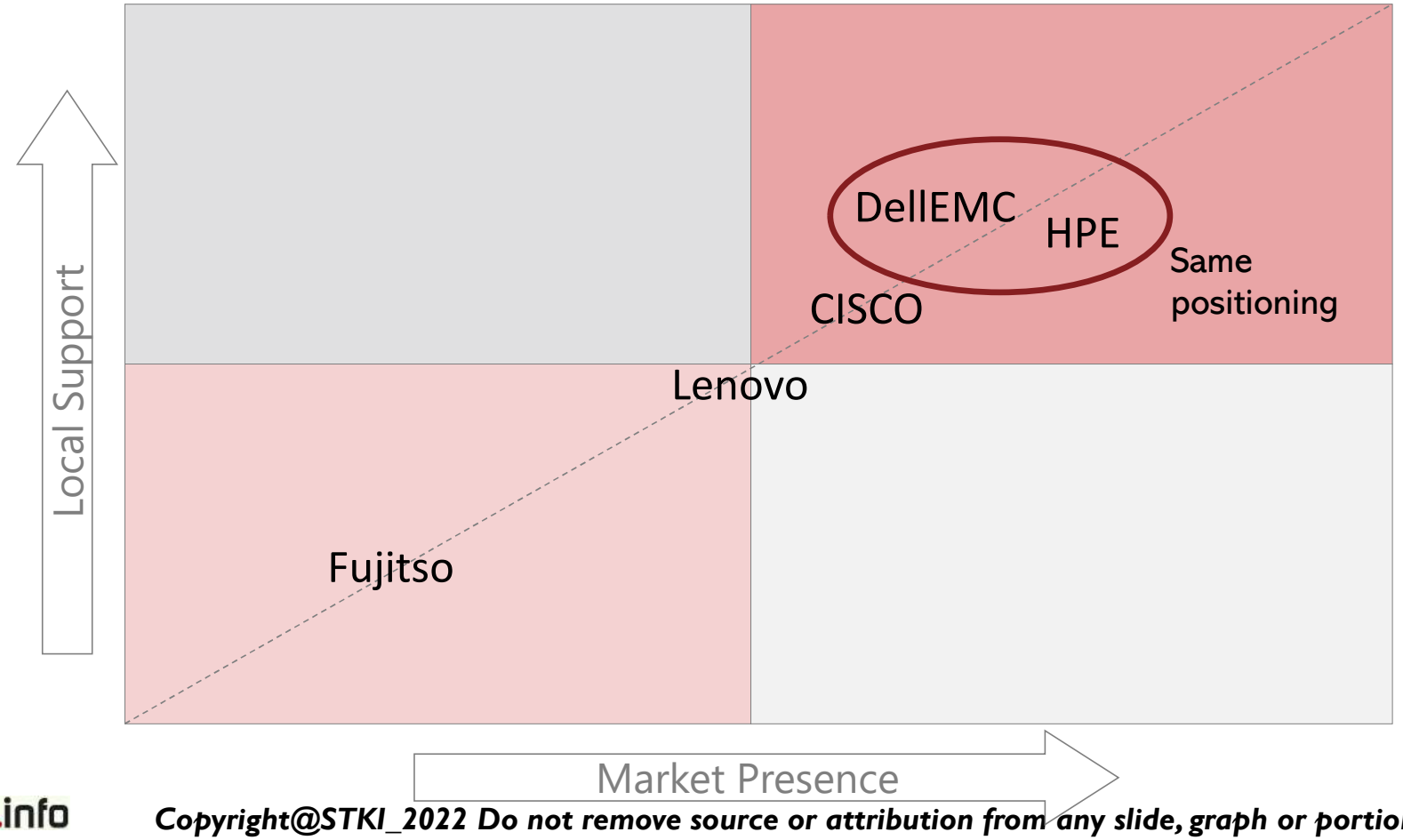
Infrastructure Market

GENERAL PURPOSE INTEL SERVERS 75



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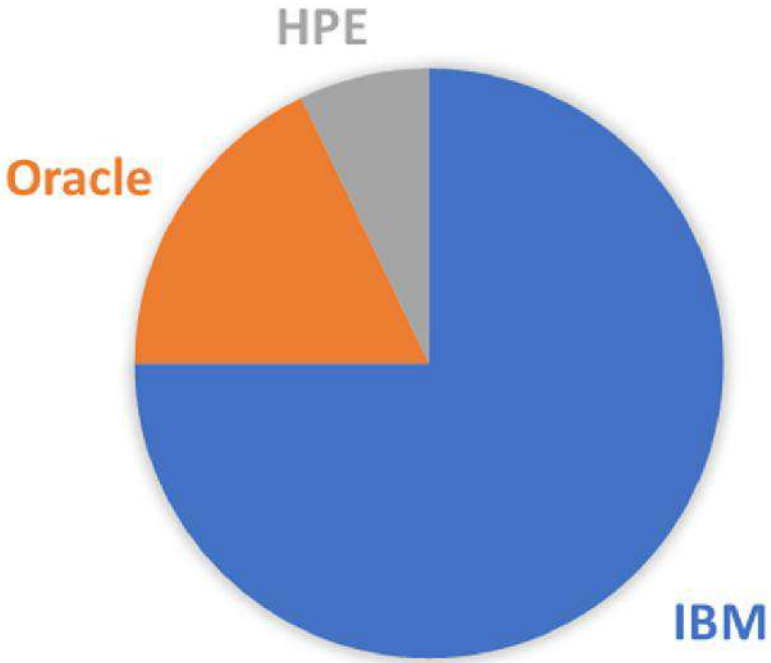
Infrastructure Market

LEGACY (NON-X86) 76



We rank VENDORS by REVENUE and CLIENT MINDSHARE

Legacy VARs (non-x86) Alphabetical Orde
Emet
Kyndryl
Malam-Team
One
Triple C

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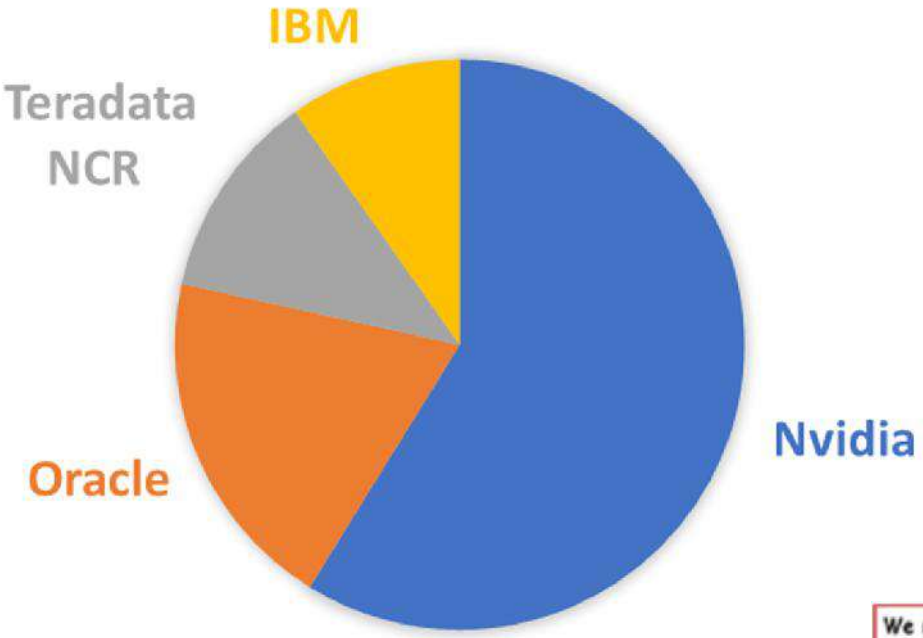
Infrastructure Market

DATA APPLIANCES

77



We rank VENDORS by REVENUE and CLIENT MINDSHARE

Data Appliances VARS ALPHABETICAL ORDER
BeLocal
bezeq ben leumi
Bynet
DnA-IT
emet
Hilan-We-Ankor
I.E.Mittwoch
Malam-Team
Matrix
one
TeraSky

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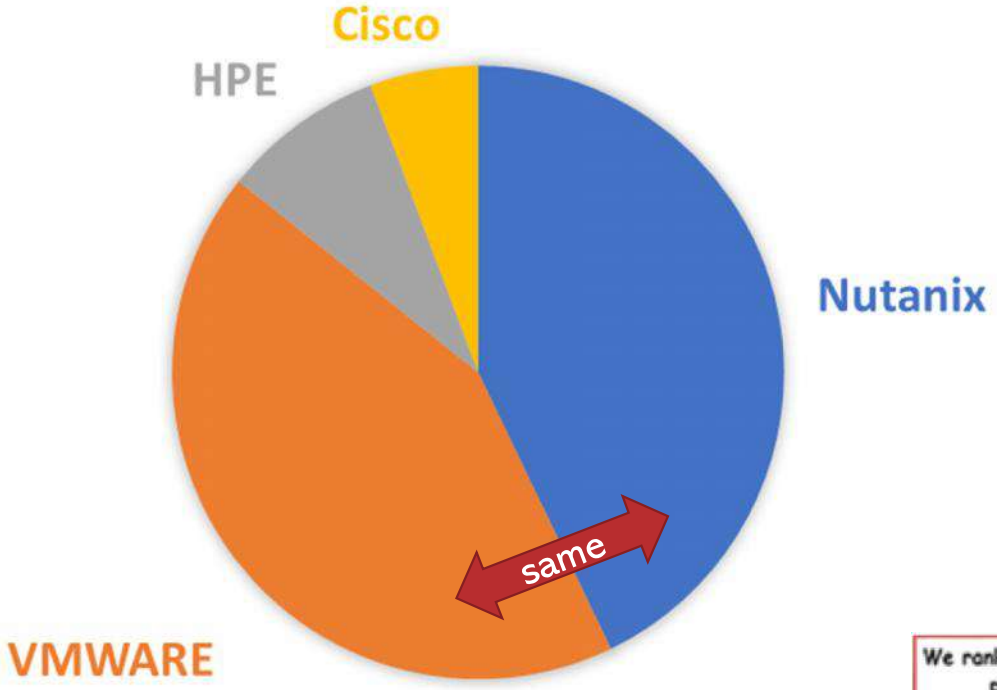
Infrastructure Market

HCI APPLIANCES

78



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

HCI Appliances VARS ALPHABETICAL ORDER
bezeq ben leumi
Bynet
DnA-IT
emet
Hilan-We-Ankor
Kyndryl
Malam-Team
Matrix
one
TeraSky
Triple C
Yael

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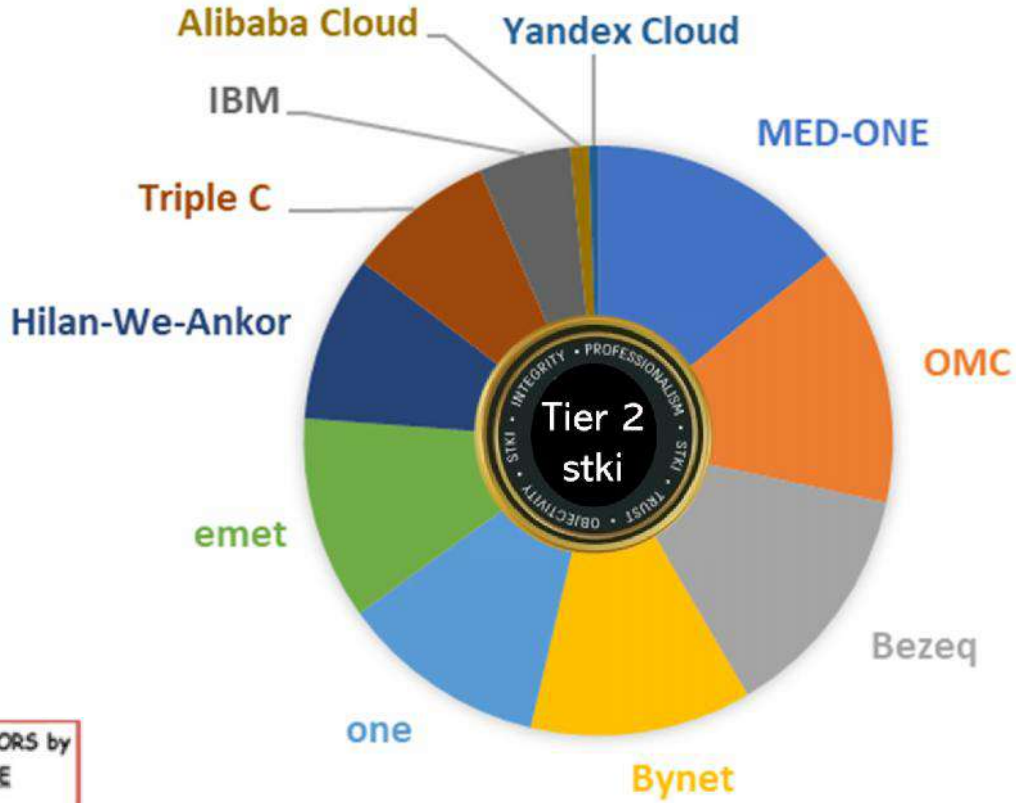
Infrastructure Market

PUBLIC CLOUD IaaS; PaaS, Compute as a Service 79



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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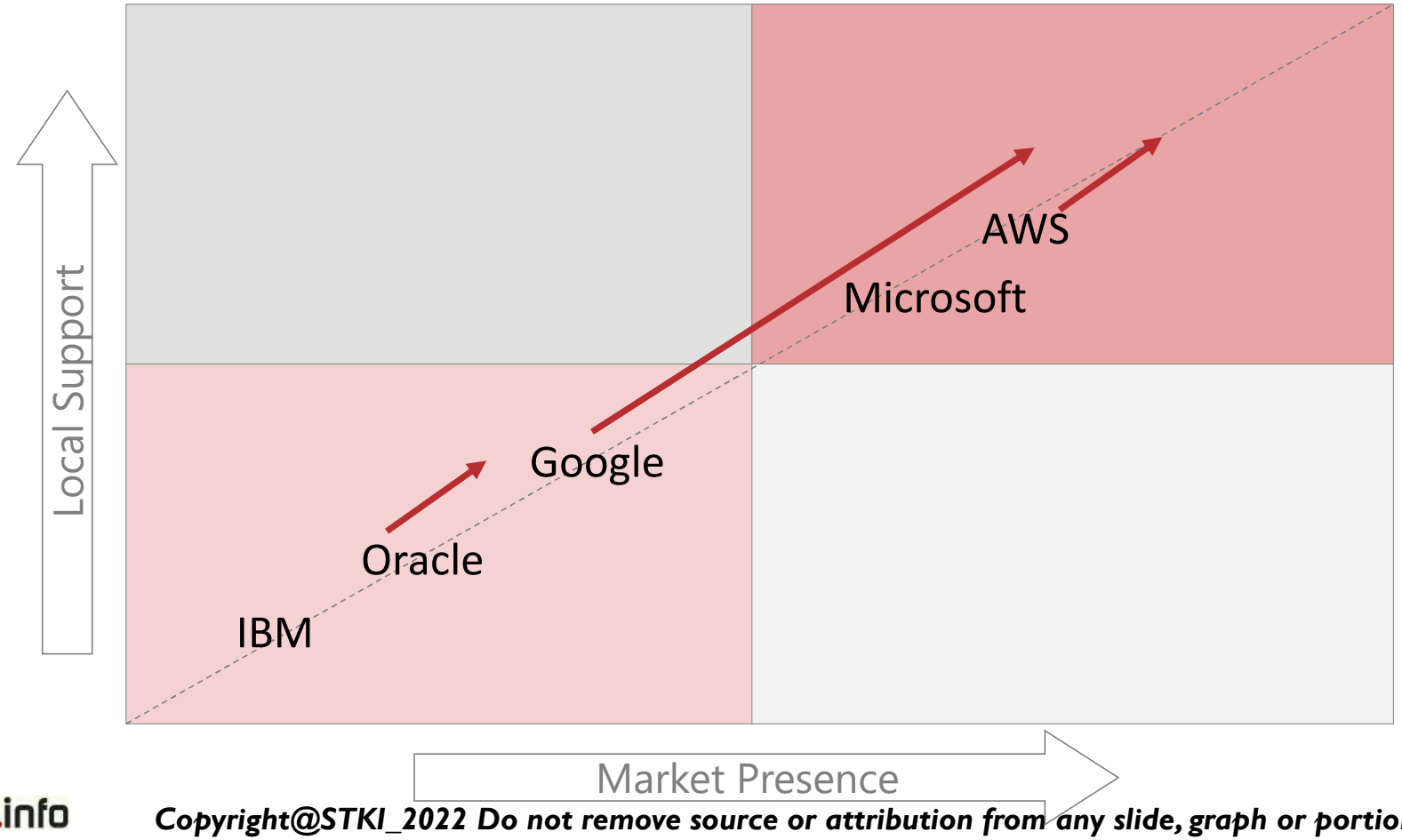
Infrastructure Market

GLOBAL PUBLIC CLOUDS

80



Vendors to watch:
Alibaba Cloud
Yandex Cloud

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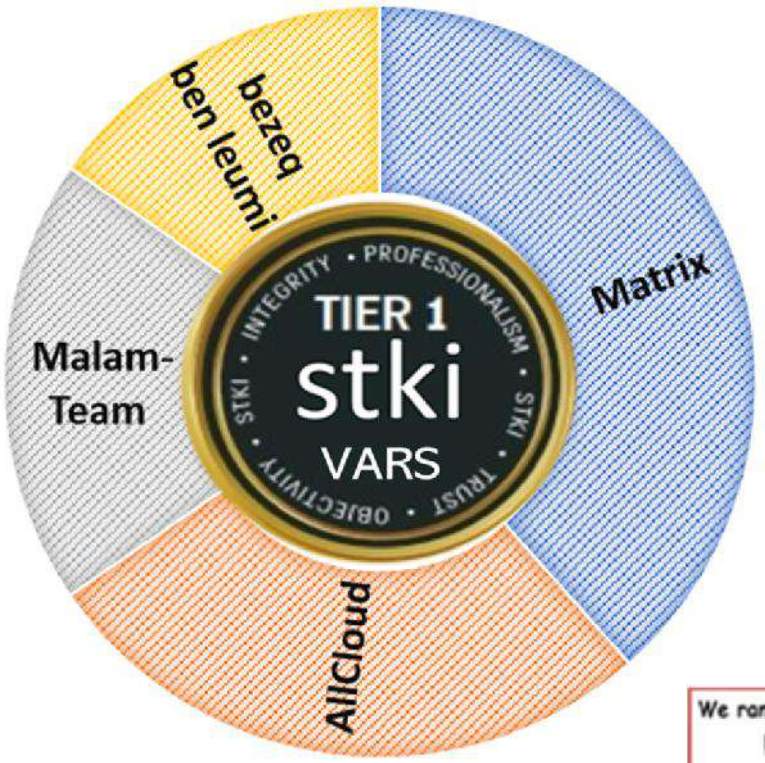
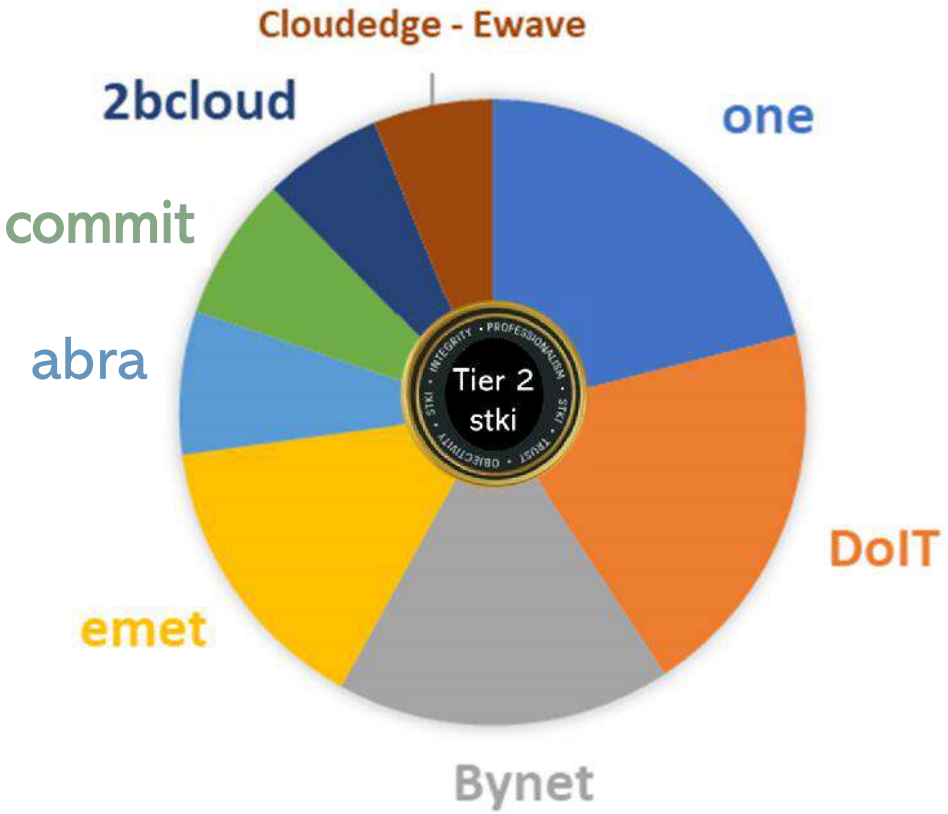
Infrastructure Market

PUBLIC CLOUD (VARs) IaaS; PaaS, Compute as a Service 81



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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Infrastructure Market

PUBLIC CLOUD (VARs) IaaS; PaaS, Compute as a Service 82

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CLIENT MINDSHARE

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Infrastructure Market

CLIENTS (enterprises only) MARKET 2018-2022 83

	2018	0.05%	2019	0.05%	2020	0.05%	2021	0.05%	2022
Window PCs (Notebook & Desktops) Enterprise only	$278.00	1.08%	$281.00	28.83%	$362.00	-3.31%	$350.00	-14.29%	$300.00
Non window's PC's Enterprise only	$13.00	7.69%	$14.00	50.00%	$21.00	33.33%	$28.00	10.71%	$31.00
TOTALS	$291.00	1.37%	$295.00	29.83%	$383.00	-1.31%	$378.00	-12.43%	$331.00

Values in Million USD

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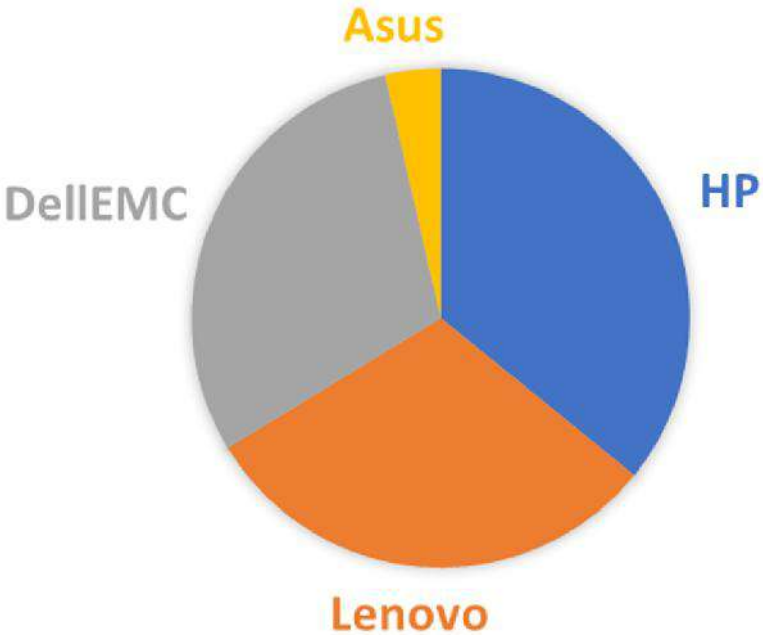
Infrastructure Market

WINDOWS PCs (COMMERCIAL ONLY) 84



We rank VENDORS by REVENUE and CLIENT MINDSHARE

non-windows PCs

Apple

Chromebooks

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Infrastructure Market

STORAGE MARKET 2018-2022

85

	2018		2019		2020		2021		2022
Enterprise Storage :Disks (HHD and SSD)	$119.50	2.93%	$123.00	7.32%	$132.00	2.27%	$135.00	-3.70%	$130.00
Enterprise Storage Tape Libraries, VTL Backup and other storage Appliances	$30.15	6.14%	$32.00	31.25%	$42.00	14.29%	$48.00	25.00%	$60.00
Public Cloud IaaS Storage & Backup as a Service	$20.00	35.00%	$27.00	29.63%	$35.00	17.14%	$41.00	21.95%	$50.00
TOTALS	$169.65	7.28%	$182.00	14.84%	$209.00	7.18%	$224.00	7.14%	$240.00

Values in Million USD

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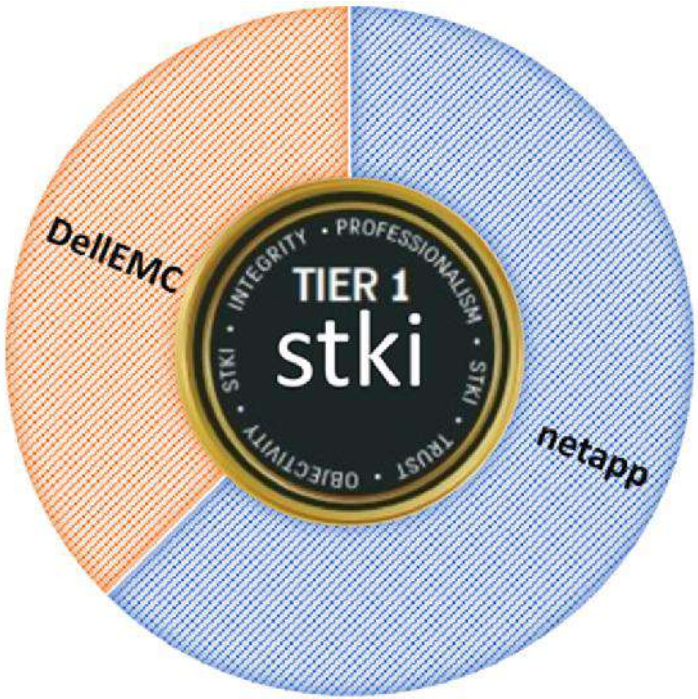
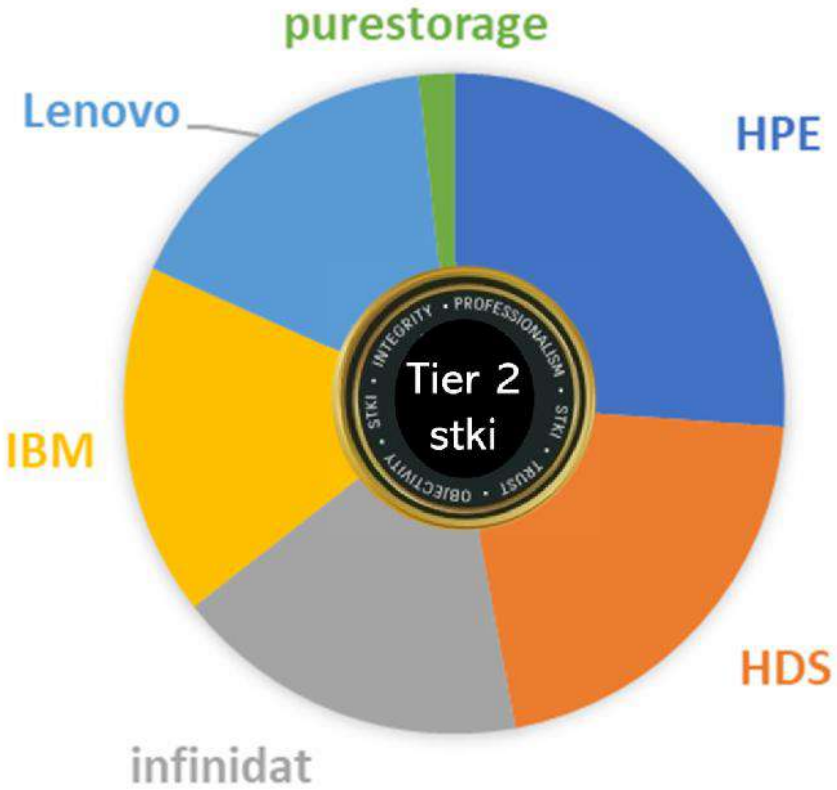
Infrastructure Market

ENTERPRISE STORAGE DISKS (HHD & SSD) 86





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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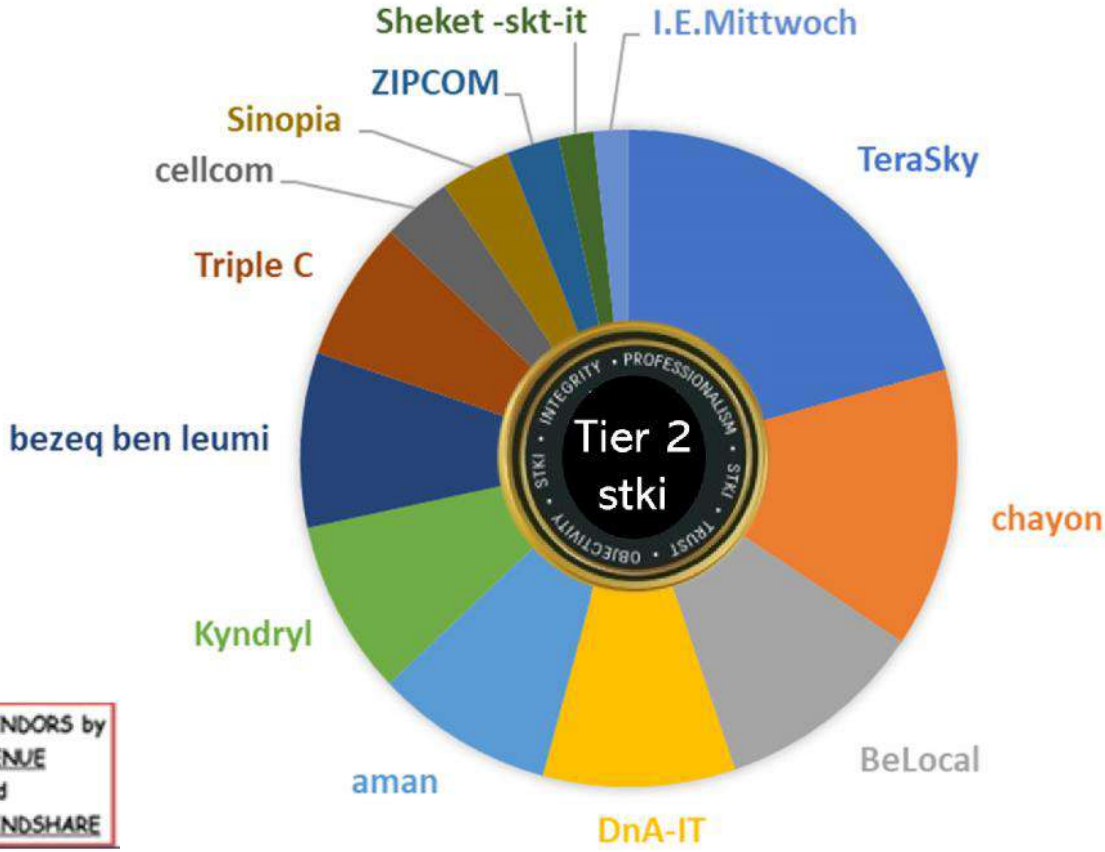
Infrastructure Market

ENTERPRISE STORAGE DISKS (HHD & SSD) VARs 87

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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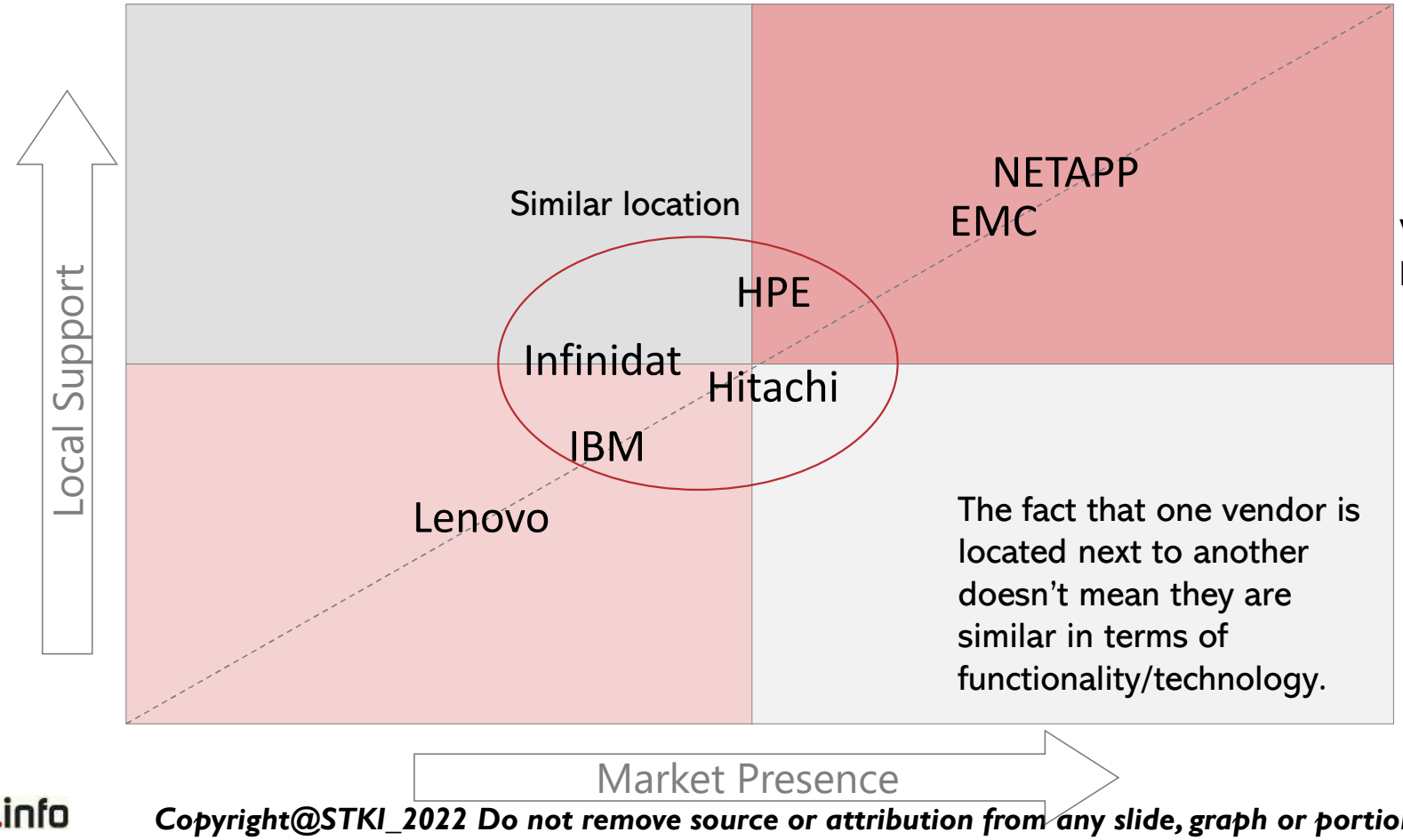
Infrastructure Market

ENTERPRISE GENERAL PURPOSE STORAGE 88



Vendors to watch:
Pure Storage

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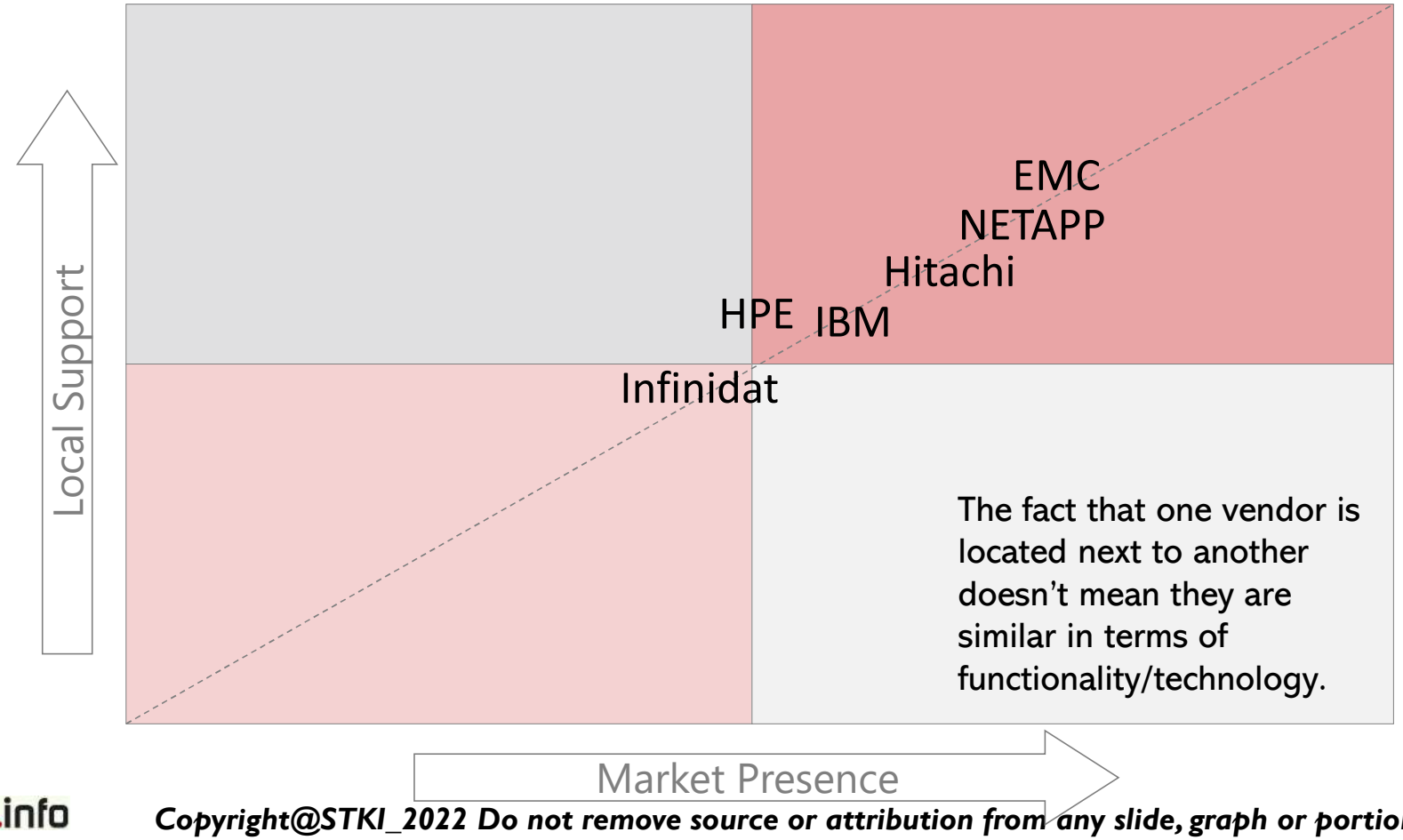
HIGH END (CRITICAL SYSTEMS) STORAGE

89



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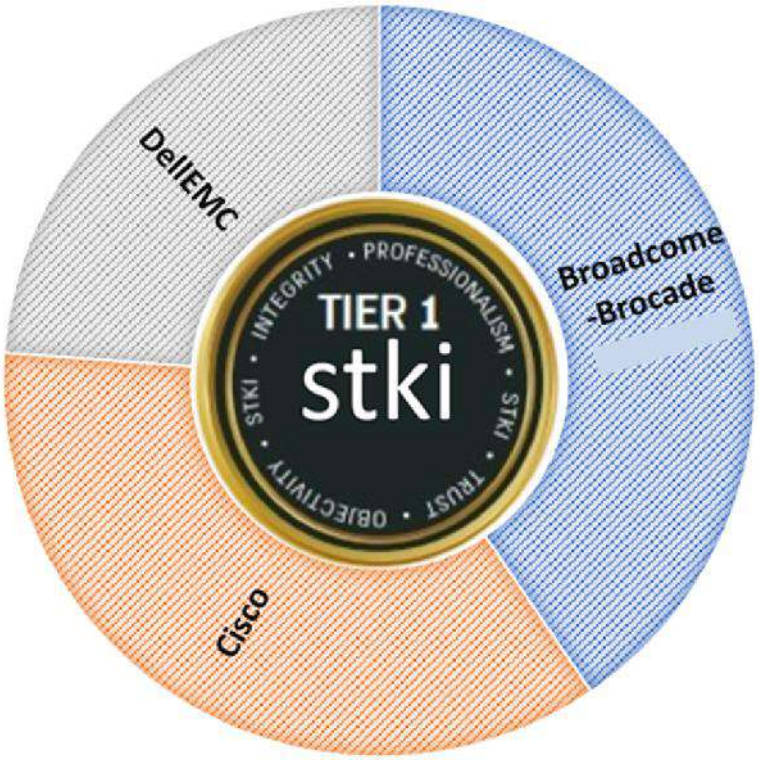
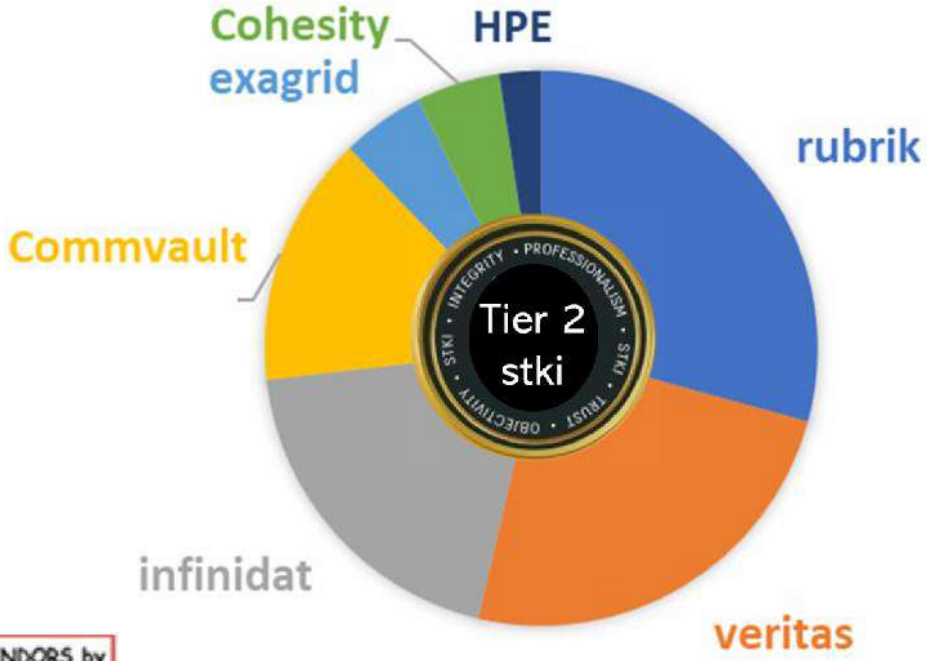
Infrastructure Market

ENTERPRISE STORAGE TAPE LIBRARIES, VTL, FC SWITCHES,BACKUP & OTHER STORAGE APPLIANCES

90





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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Infrastructure Market

ENTERPRISE STORAGE TAPE LIBRARIES, VTL, BACKUP, OTHER STORAGE APPLIANCES VARs

Enterprise Storage Tape Libraries, VTL Backup and other storage Appliances VARS ALPHABETICAL ORDER
aman
Bynet
emet
I.E.Mittwoch
Malam-Team
Matrix
one
TeraSky

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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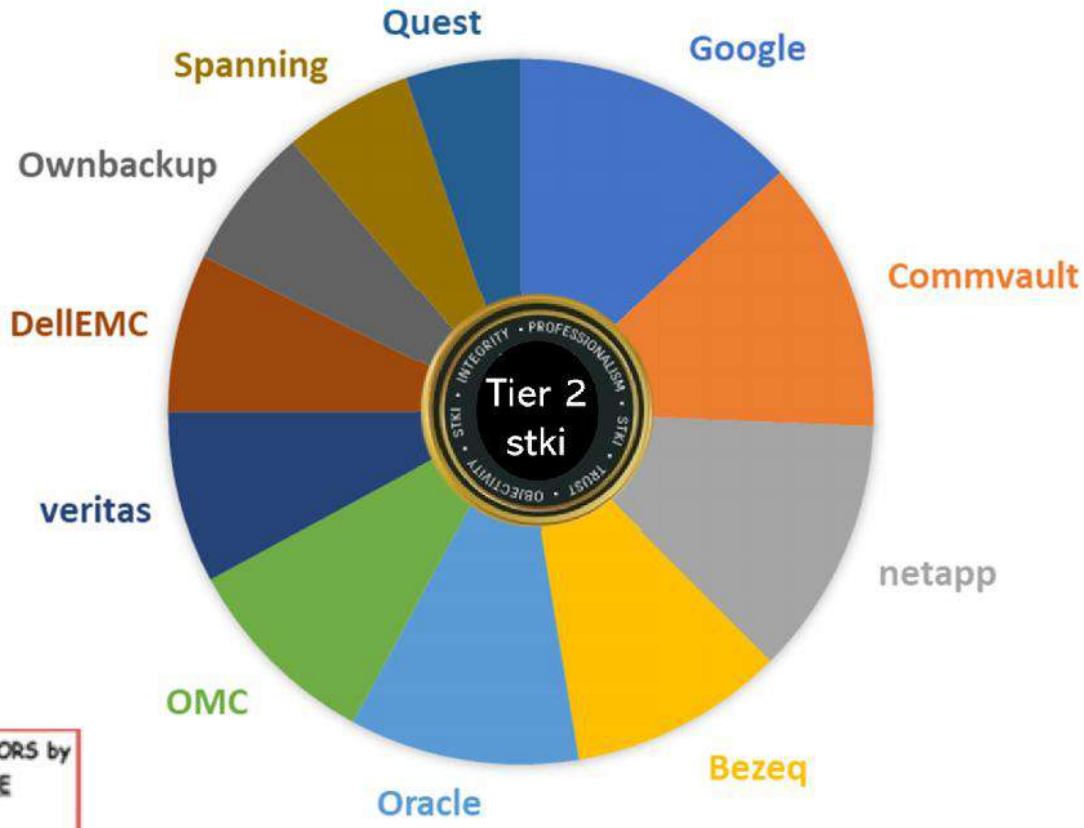
Infrastructure Market

DRaaS / Storage as a Service

92



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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Infrastructure Market

NETWORKING, VoIP, SECURITY MARKET 2018-2022 93

	2018	0.05%	2019	0.05%	2020	0.05%	2021	0.05%	2022
Enterprise Networking	$220.00	2.27%	$225.00	4.44%	$235.00	10.64%	$260.00	5.77%	$275.00
Security / Cyber Appliances	$148.00	5.41%	$156.00	15.38%	$180.00	8.33%	$195.00	4.10%	$203.00
VoIP/Call Center Equipment	$51.50	2.91%	$53.00	47.17%	$78.00	10.26%	$86.00	6.98%	$92.00
Call Center as a Service	$5.00	60.00%	$8.00	125.00%	$18.00	66.67%	$30.00	16.67%	$35.00
TOTALS	$424.50	4.12%	$442.00	15.61%	$511.00	11.74%	$571.00	5.95%	$605.00

Values in Million USD

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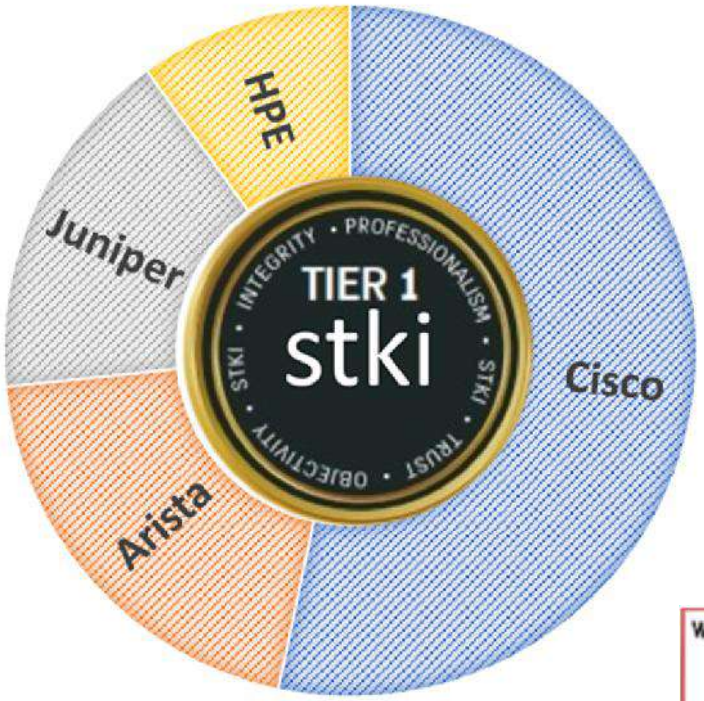
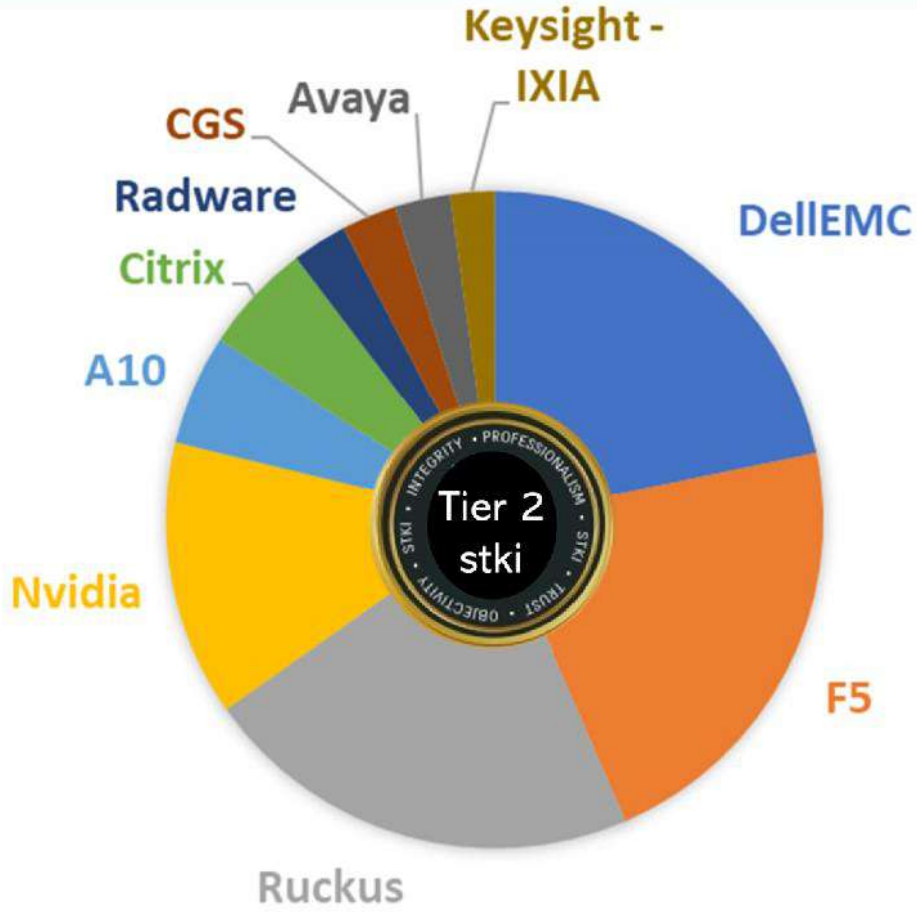
Infrastructure Market

ENTERPRISE & DATA CENTER NETWORKING 94



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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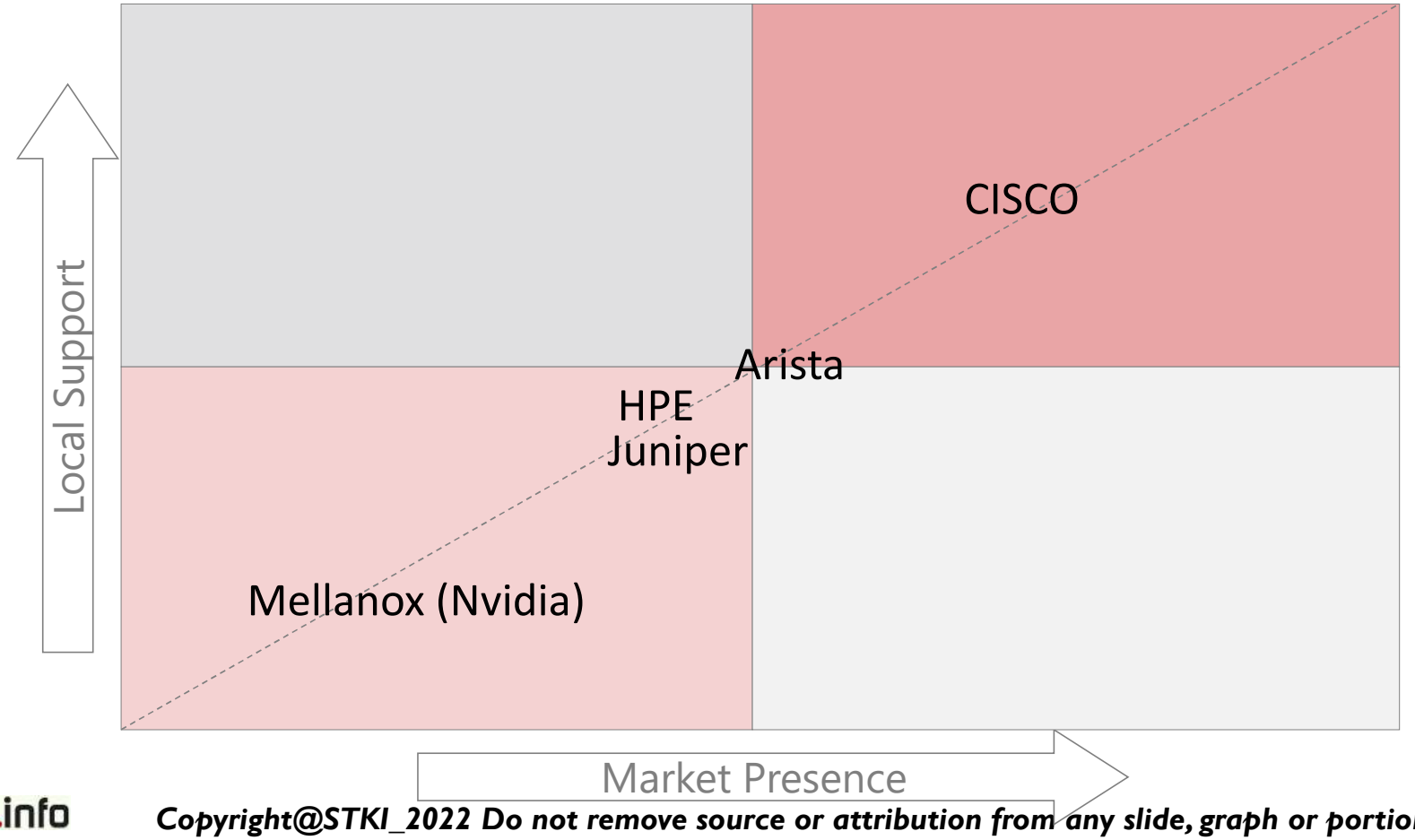
ENTERPRISE & DATA CENTER NETWORKING 95



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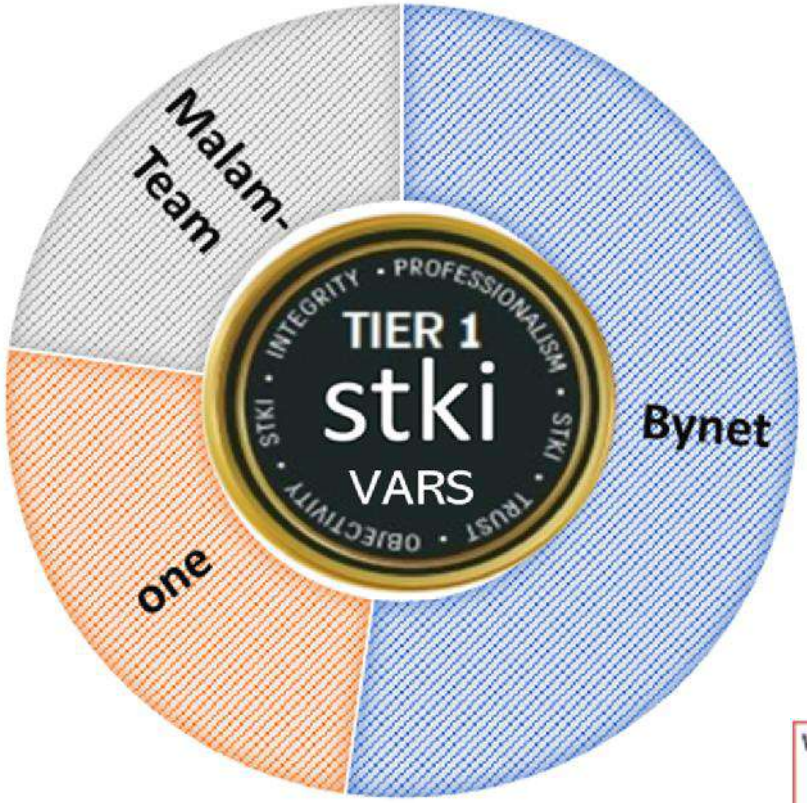
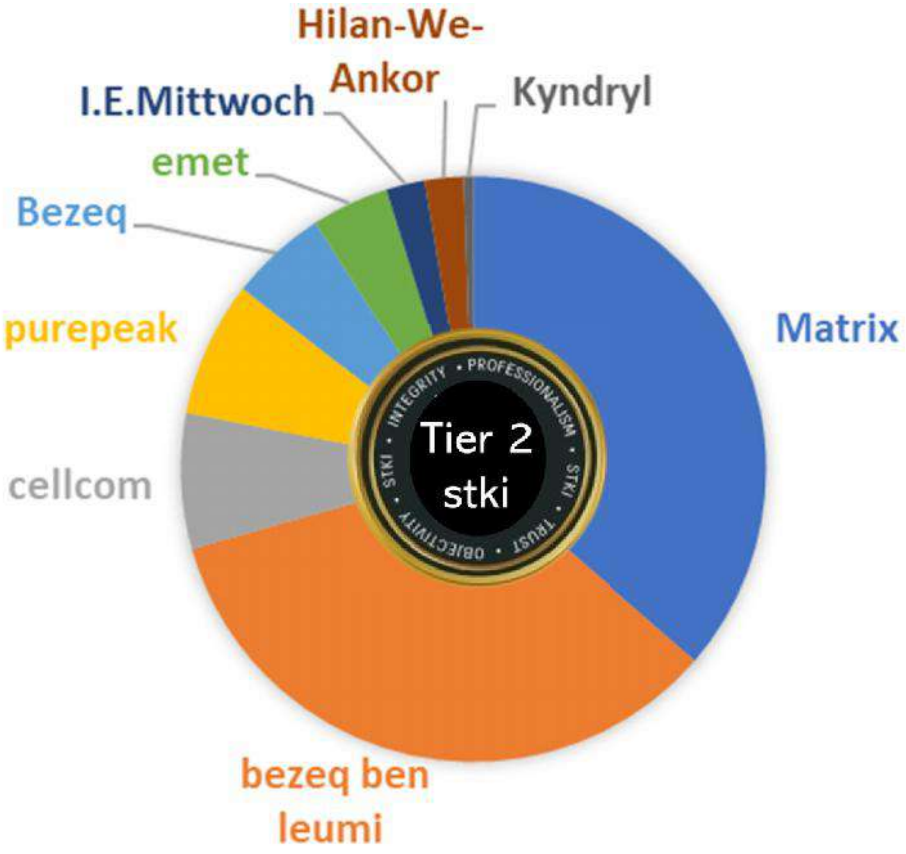
ENTERPRISE & DATA CENTER NETWORKING VARs 96





We rank VENDORS by REVENUE and CLIENT MINDSHARE

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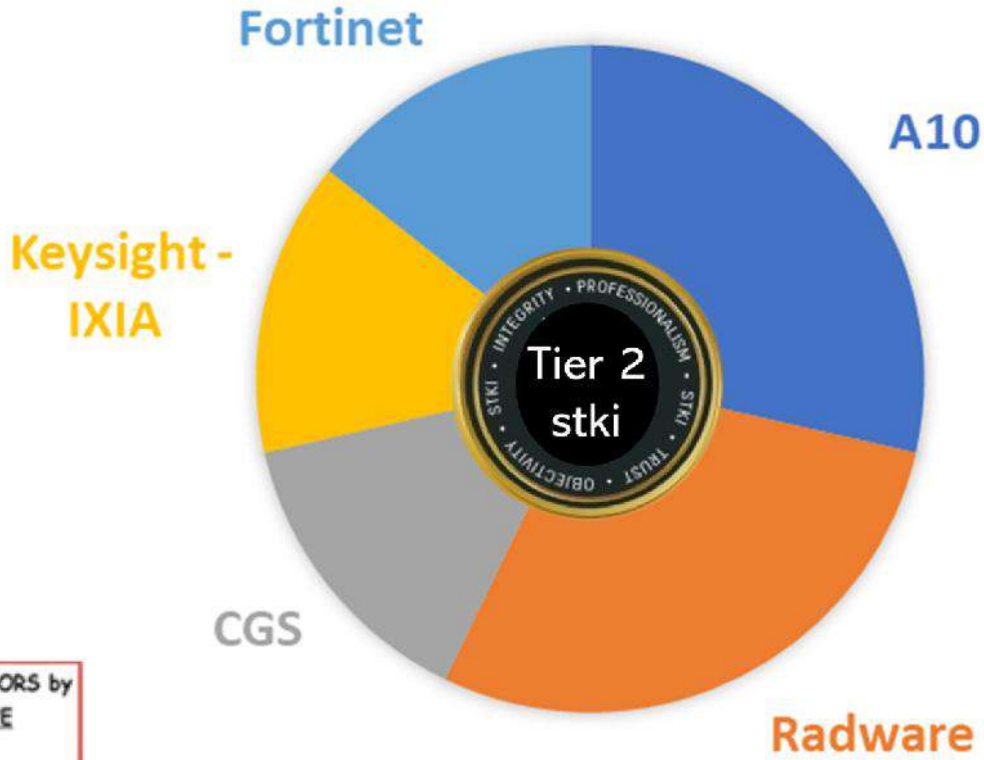
SECURITY/ CYBER APPLIANCES 97



We rank VENDORS by
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CLIENT MINDSHARE

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SECURITY/ CYBER APPLIANCES VARs 98

Security / Cyber Appliances VARS ALPHABETICAL ORDER
bezeq ben leumi
Bynet
emet
Hilan-We-Ankor
Kyndryl
Malam-Team
Matrix
MED-ONE
one

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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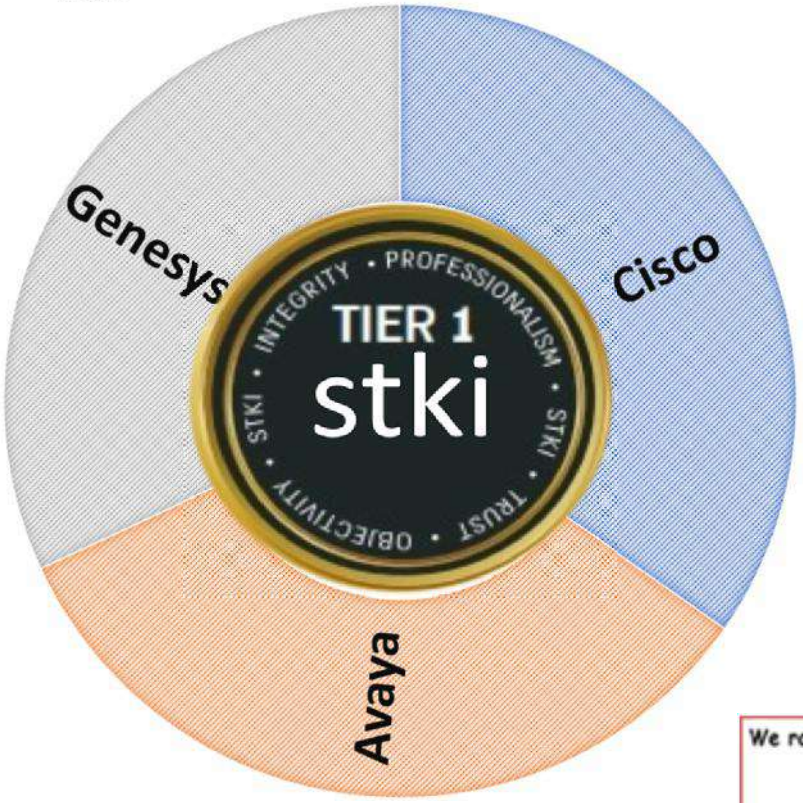
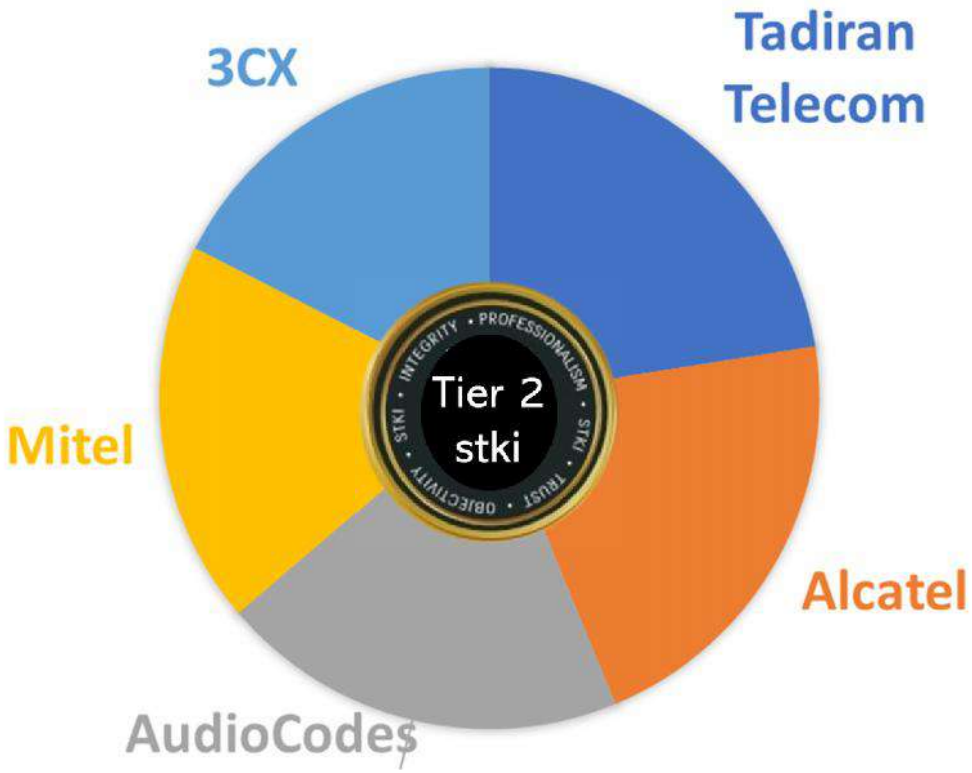
Infrastructure Market

VoIP / CALL CENTER EQUIPMENT 99





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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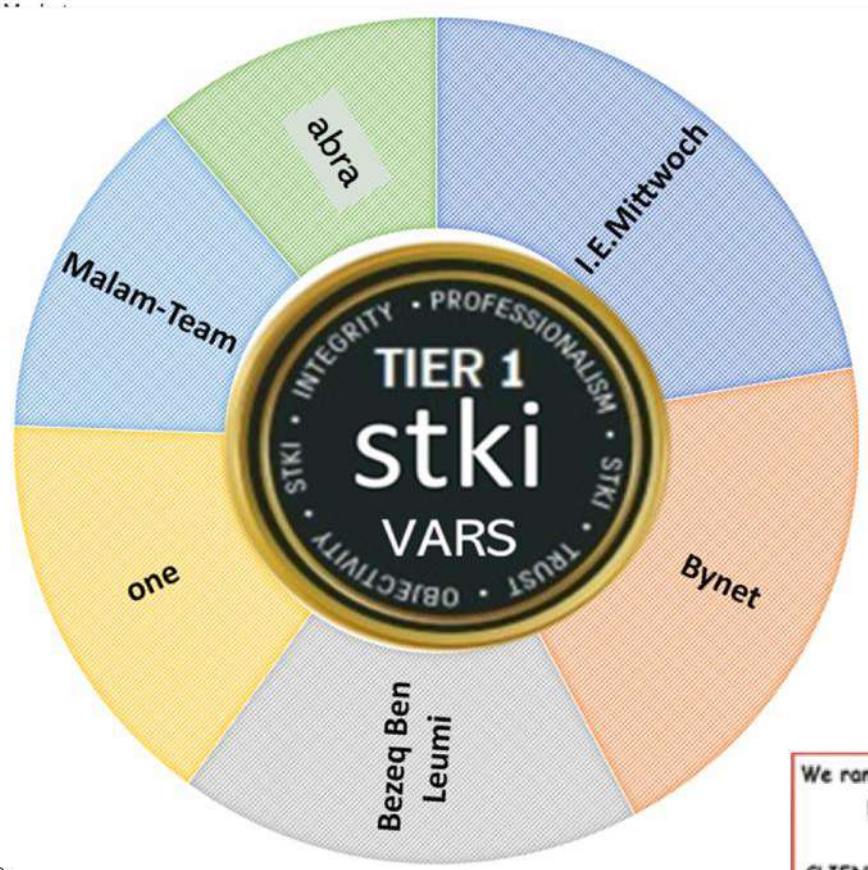
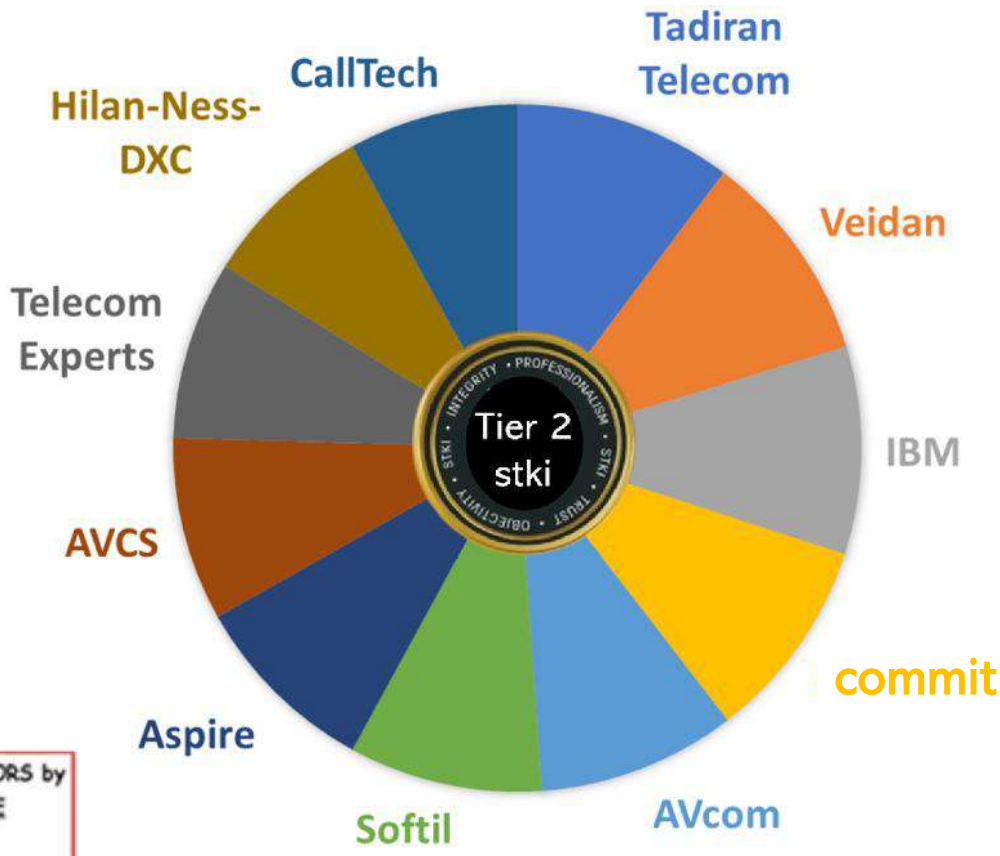
Infrastructure

VoIP / CALL CENTER EQUIPMENT VARS 100





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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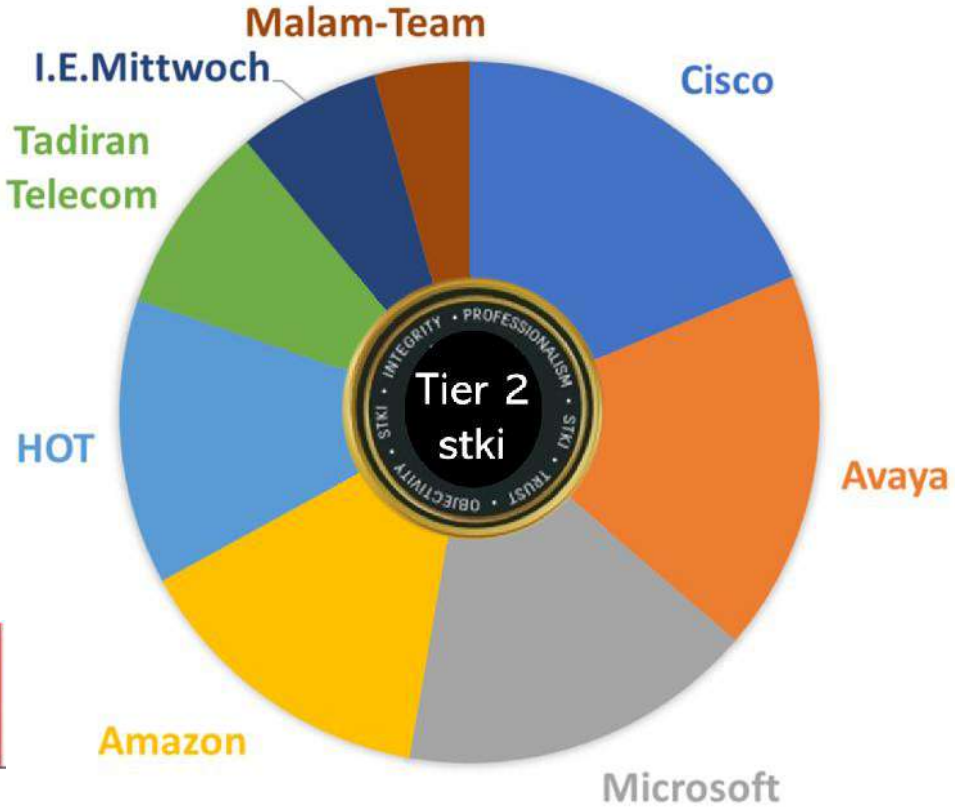
Infrastructure Market

CALL CENTER as a SERVICE

101



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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Infrastructure Market

SELF-SERVICE & DC EQUIPMENT MARKET 2018-2022 102

	2018	0.05%	2019	0.05%	2020	0.05%	2021	0.05%	2022
Data Center Physical Equipment	$97.00	2.58%	$99.50	-14.57%	$85.00	20.00%	$102.00	58.82%	$162.00
Off-site Data Center: Co-Location; Hosting (Client owns the HW)	$88.00	6.82%	$94.00	8.51%	$102.00	22.55%	$125.00	60.00%	$200.00
POS +Self Service (ATM/Kiosks/other)	$170.00	8.82%	$185.00	2.70%	$190.00	7.89%	$205.00	7.32%	$220.00
TOTALS	$355.00	6.62%	$378.50	-0.40%	$377.00	14.59%	$432.00	34.72%	$582.00

Values in Million USD

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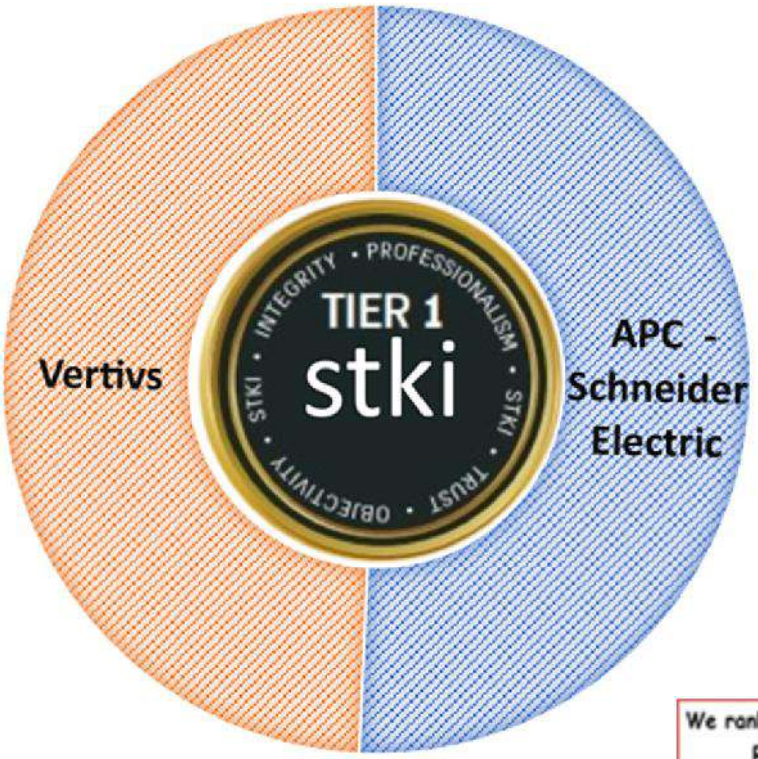
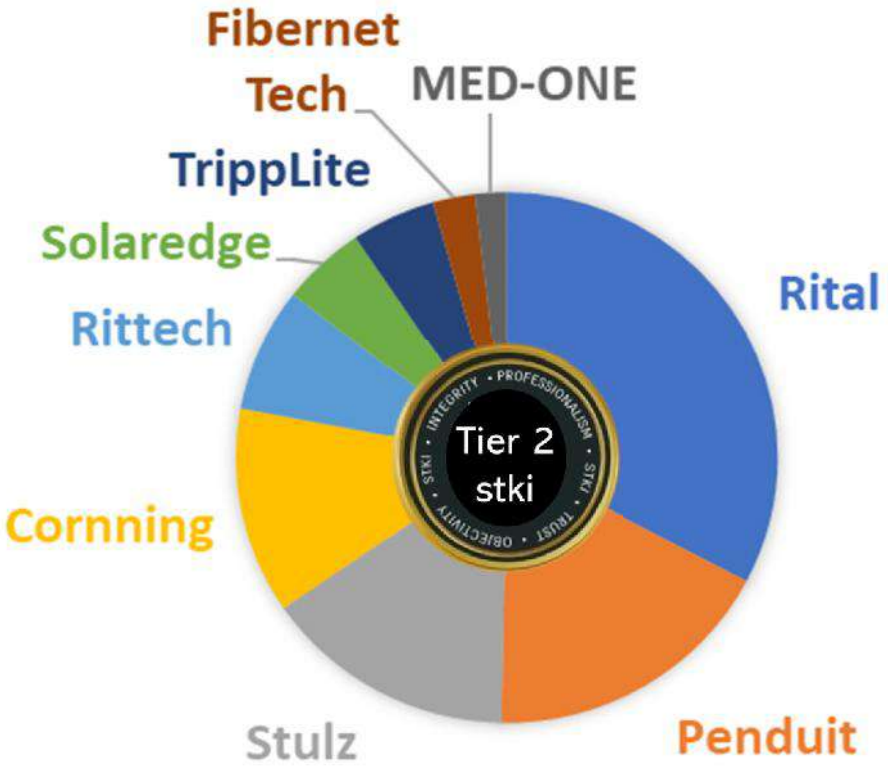
DATA CENTER PHYSICAL EQUIPMENT 103



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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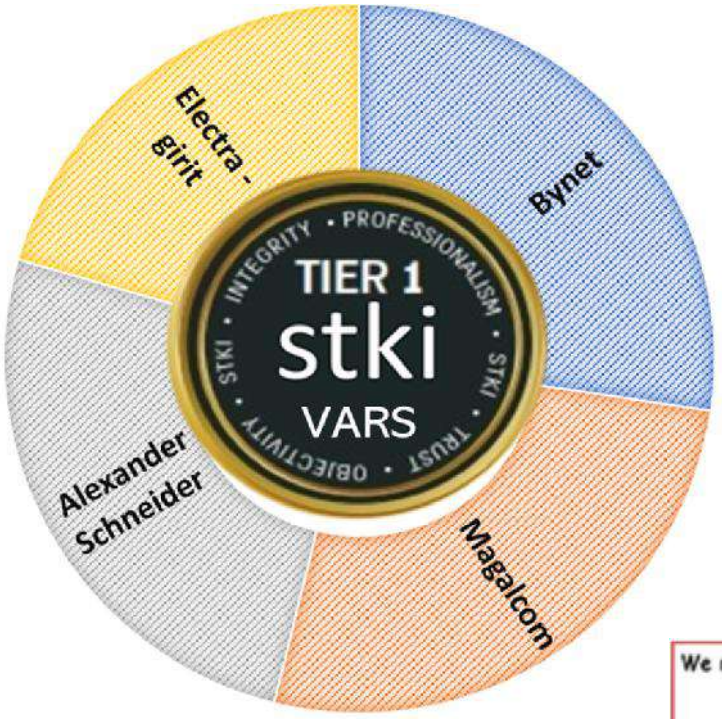
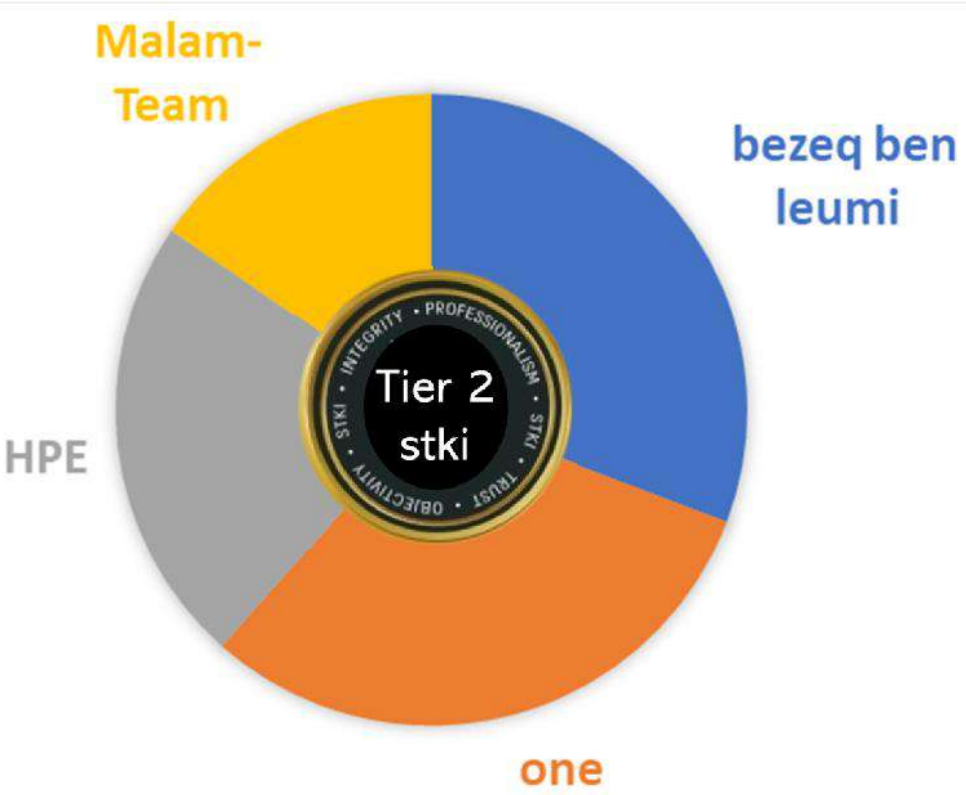
Infrastructure Market

DATA CENTER PHYSICAL EQUIPMENT VARs 104



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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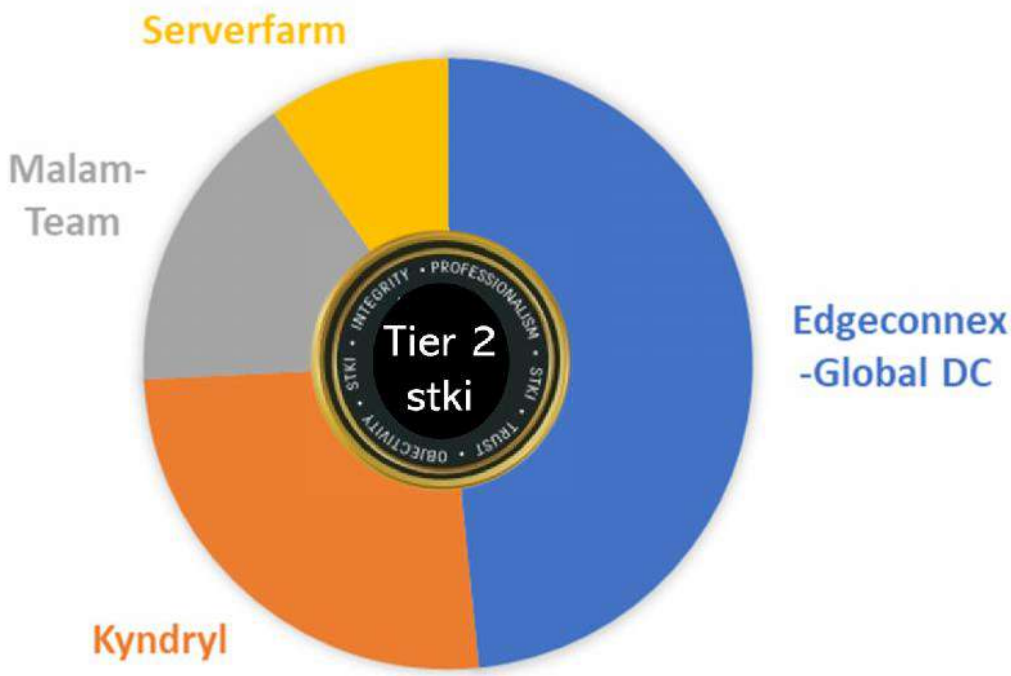
Infrastructure Market

OFF-SITE DATA CENTER, CO-LOCATION, HOSTING (client owns the HW)

105



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

*** under construction*

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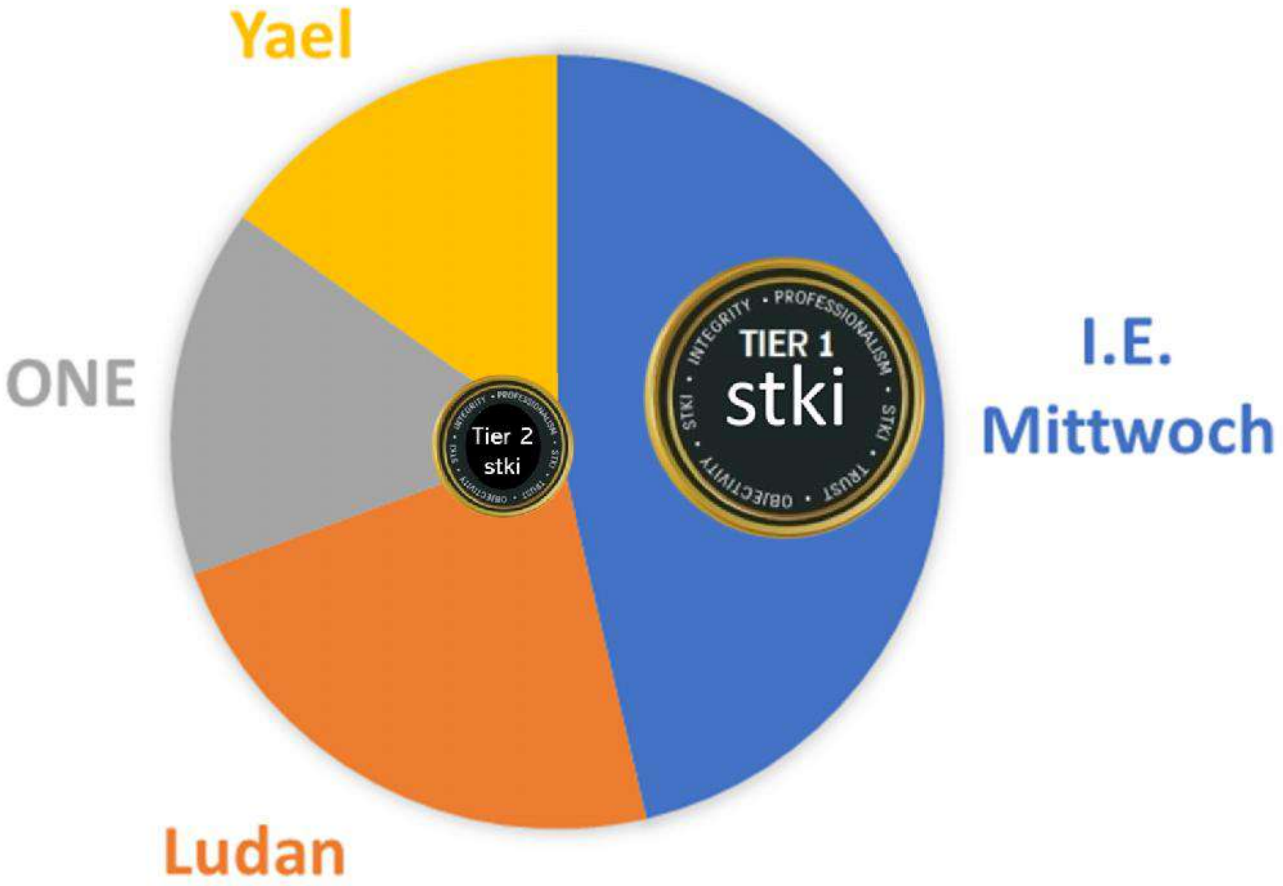
Infrastructure Market

POS & SELF SERVICE (ATM, KIOSKS, OTHER) 106



We rank VENDORS by REVENUE and CLIENT MINDSHARE

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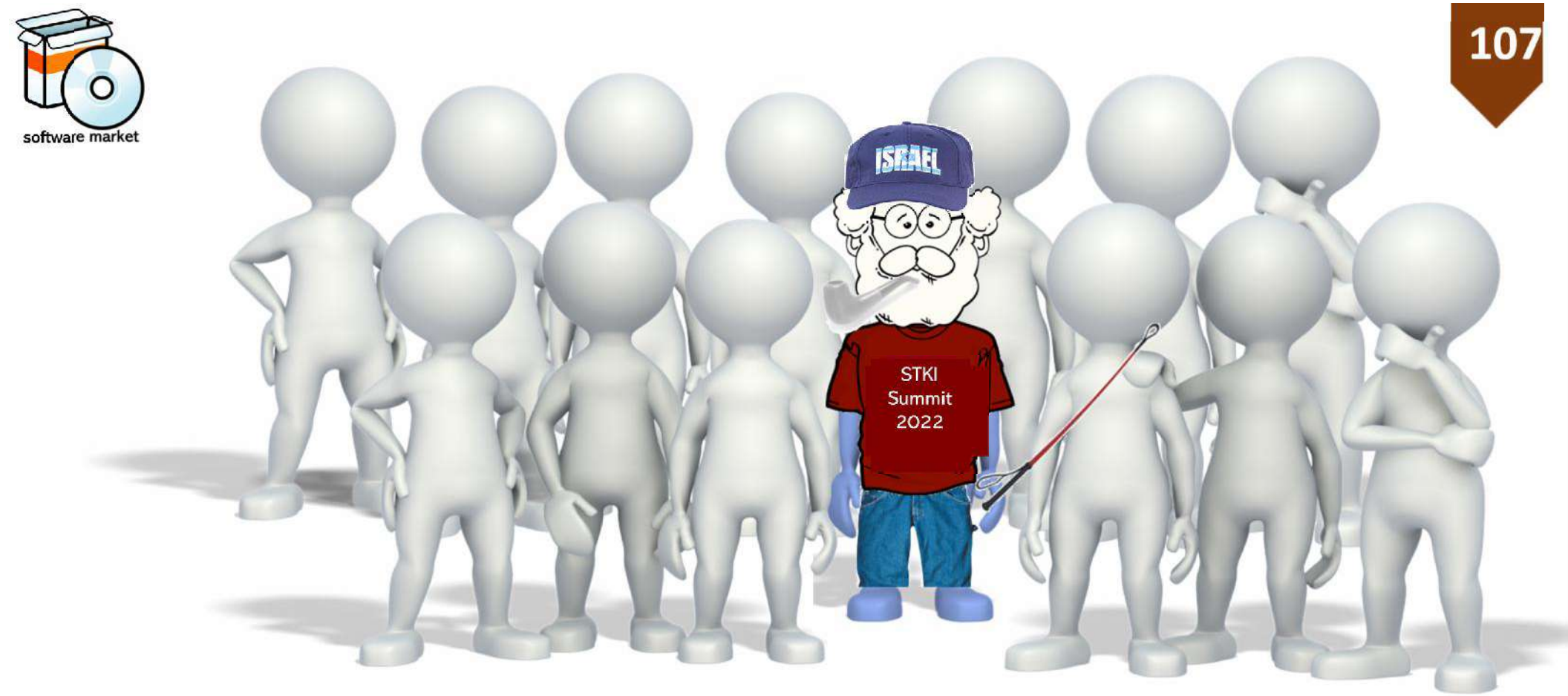

SOFTWARE (on-prem & cloud) PRODUCTS

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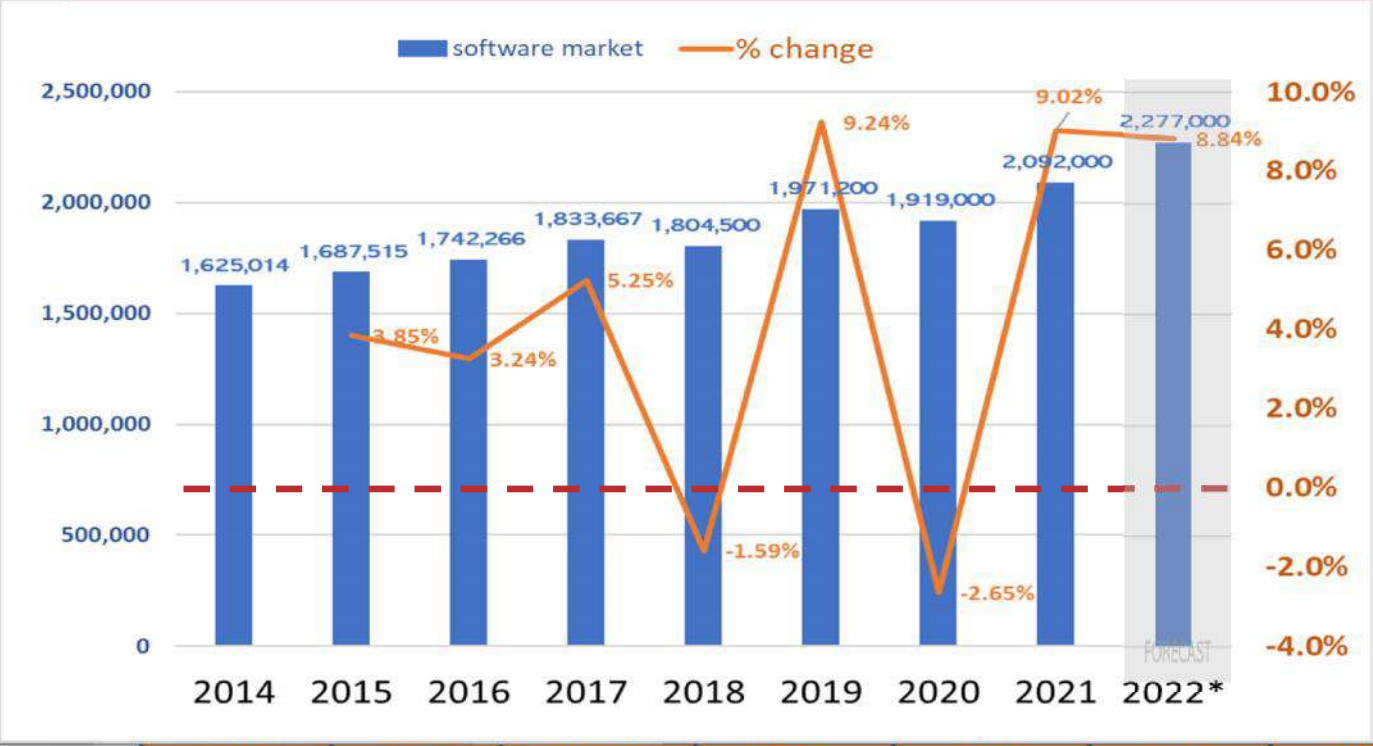
Software (on-prem & cloud) Market 2014-2022

108



Values in K USD

software market	2014	2015	2016	2017	2018	2019	2020	2021	2022*
	1,625,014	1,687,515	1,742,266	1,833,667	1,804,500	1,971,200	1,919,000	2,092,000	2,277,000
% change		3.85%	3.24%	5.25%	-1.59%	9.24%	-2.65%	9.02%	8.84%

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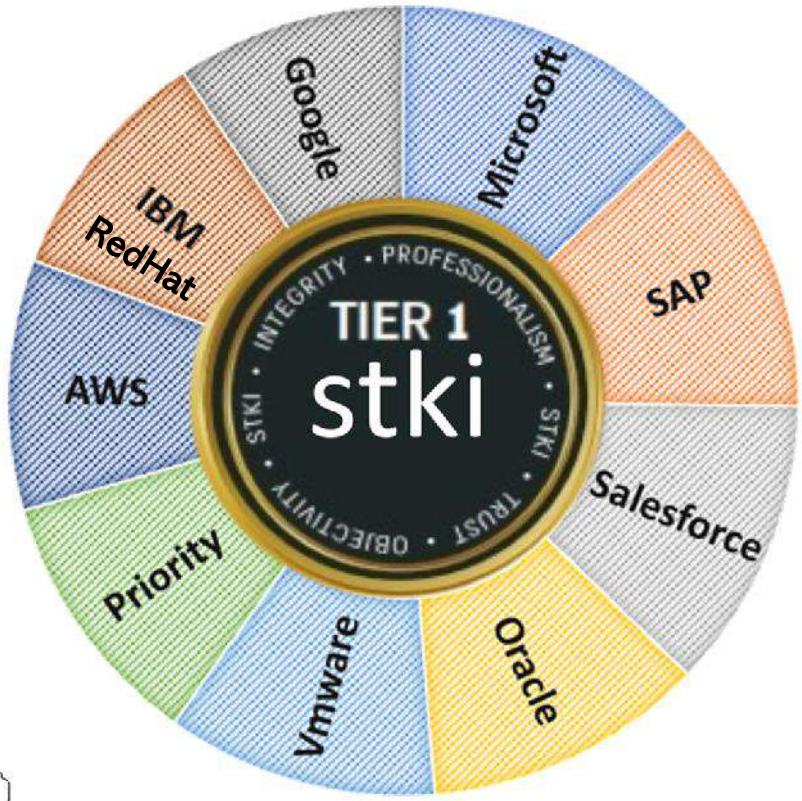
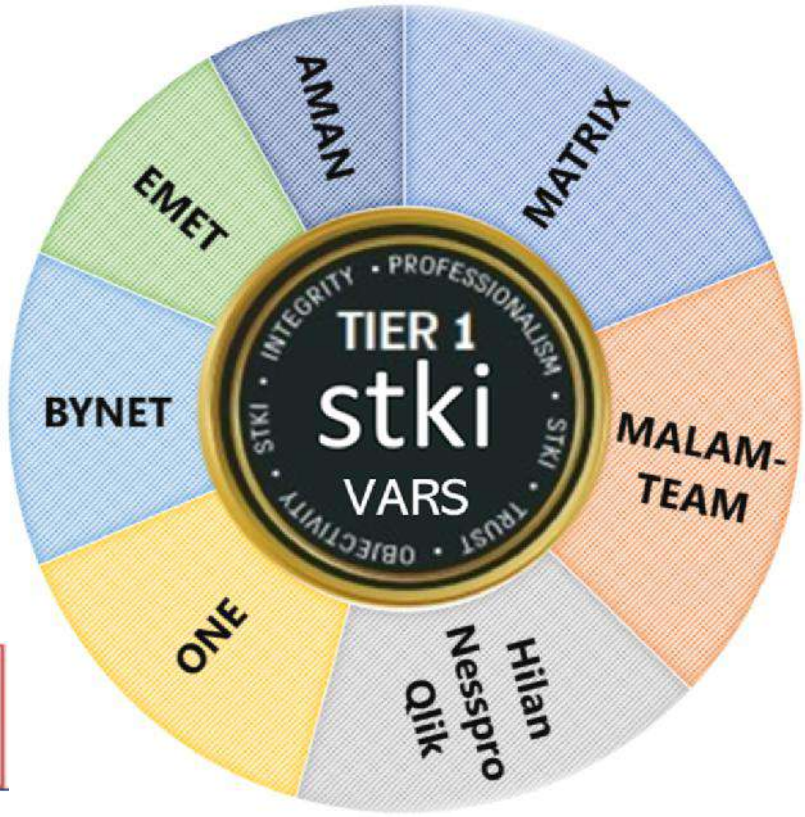
TOP VENDORS: Software Markets

Software Companies



Software VARS



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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SOFTWARE CATEGORIES (pages) 110

System, Storage & Data Platform tools page: 111

Middleware Tools page: 119

IT Management & Operations Tools page: 128

Security & Cyber Tools page: 137

Project Development & Management Tools page: 144

EGRC Tools page: 155

Knowledge & Collaboration Tools page: 158

Analytics & Data Management Tools page: 161

Enterprise Management Tools page: 175

Business Application Tools page: 192

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SYSTEM, STORAGE & DATA PLATFORMS MARKET 2018-2022

	2018		2019		2020		2021		2022
Infrastructure & System Software	$150.00	17.33%	$176.00	7.95%	$190.00	7.89%	$205.00	-2.44%	$200.00
storage & backup SW	$82.00	21.95%	$100.00	5.00%	$105.00	4.76%	$110.00	-4.55%	$105.00
data platforms (SQL, NoSQL dbms)	$65.00	-3.08%	$63.00	-4.76%	$60.00	3.33%	$62.00	4.84%	$65.00
TOTALS	$297.00	14.14%	$339.00	4.72%	$355.00	6.20%	$377.00	-1.86%	$370.00

Values in Million USD

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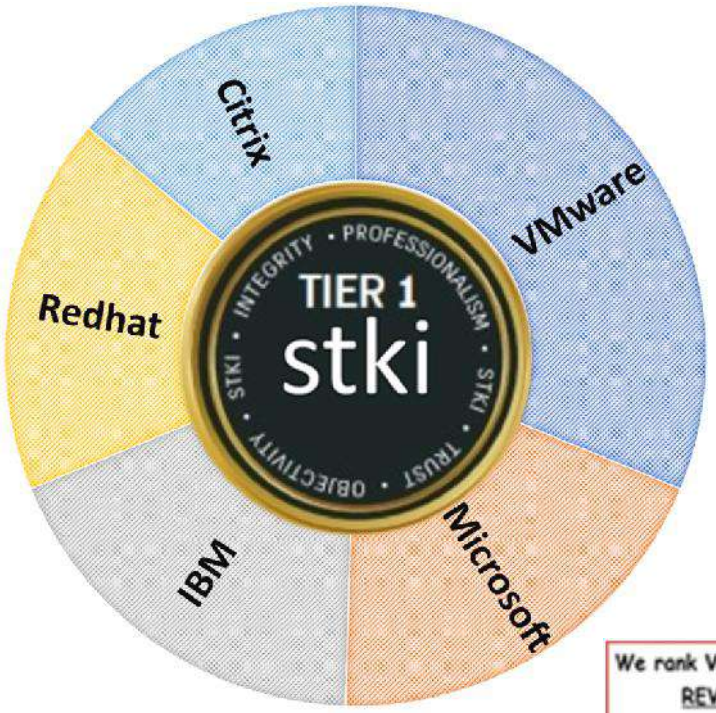
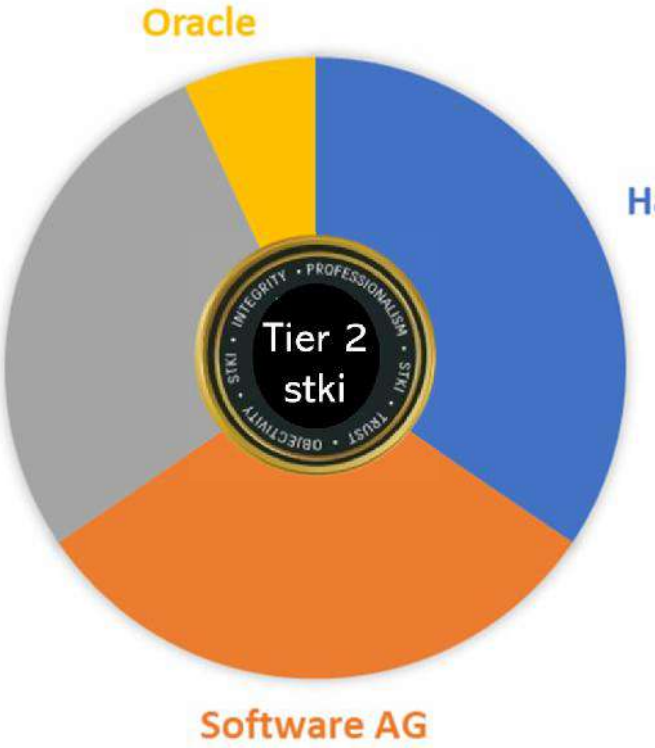
INFRASTRUCTURE & SYSTEM SOFTWARE 112





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

Infrastructure & System Software VARS ALPHABETICAL ORDER
aman
bezeq ben leumi
Bynet
emet
Hilan-Ness
I.E.Mittwoch
ICTBIT
Kyndryl
Malam-Team
Matrix
one
Rubicone
TeraSky
Yael

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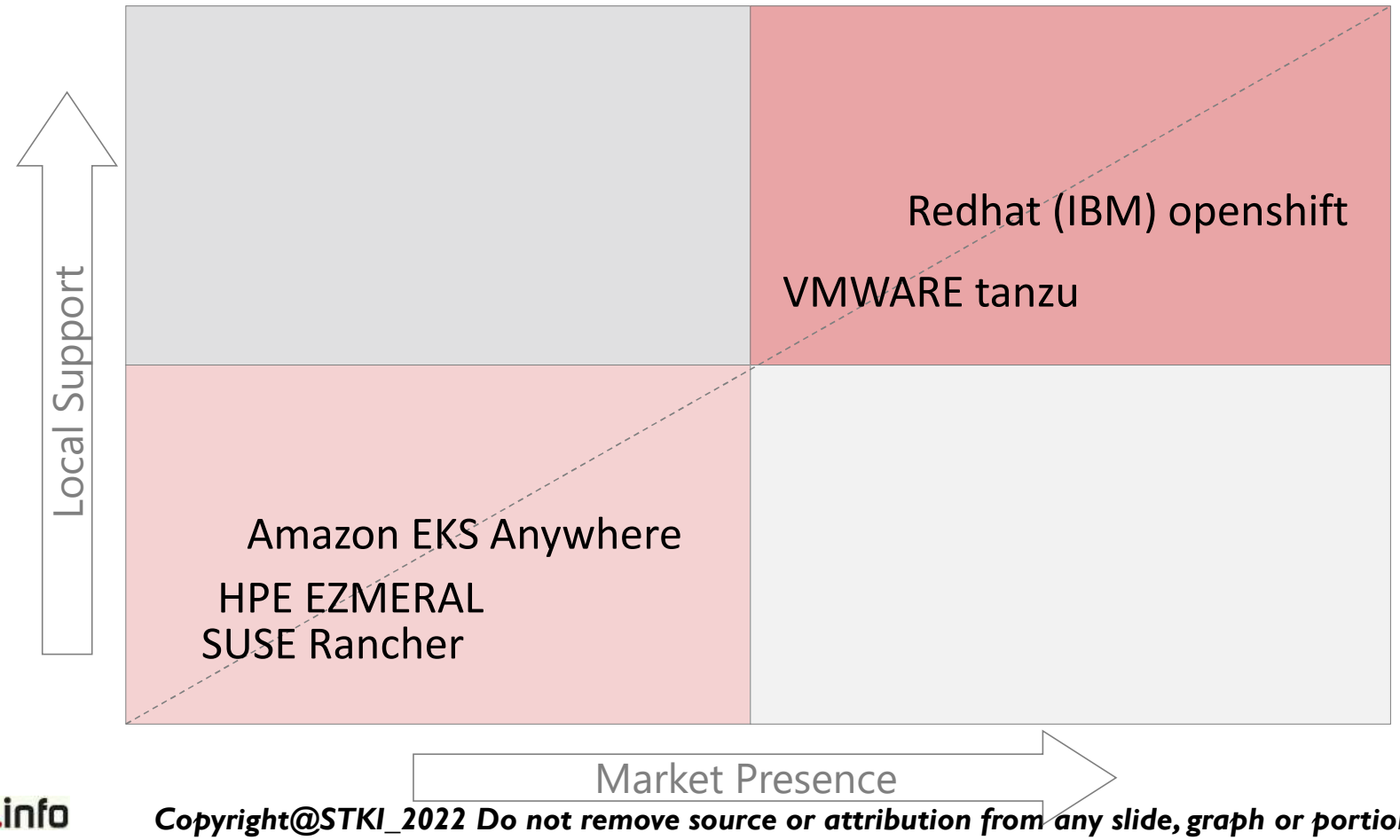
ON-PREMISE (CLOUD) CONTAINER PLATFORMS 113



Vendors to watch:
Google-Anthos

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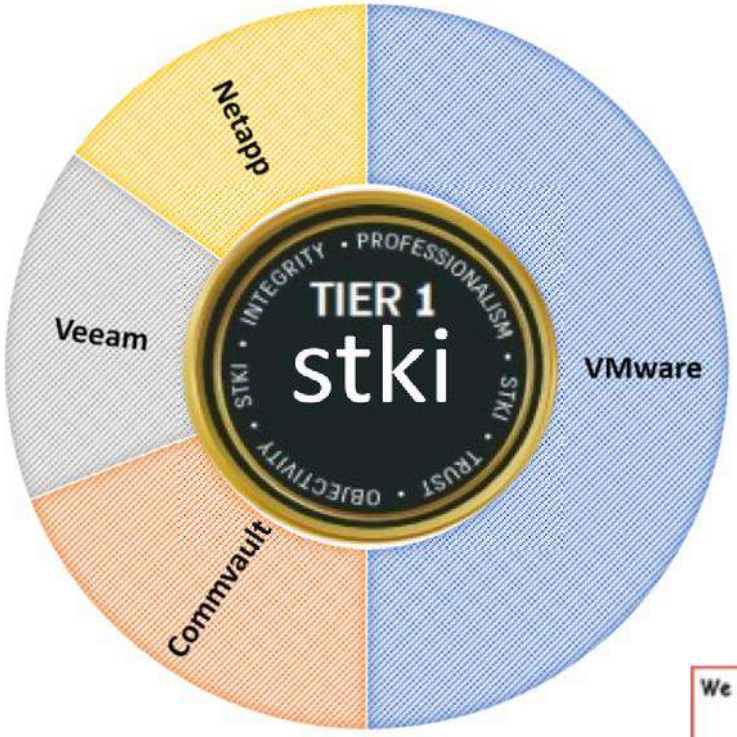
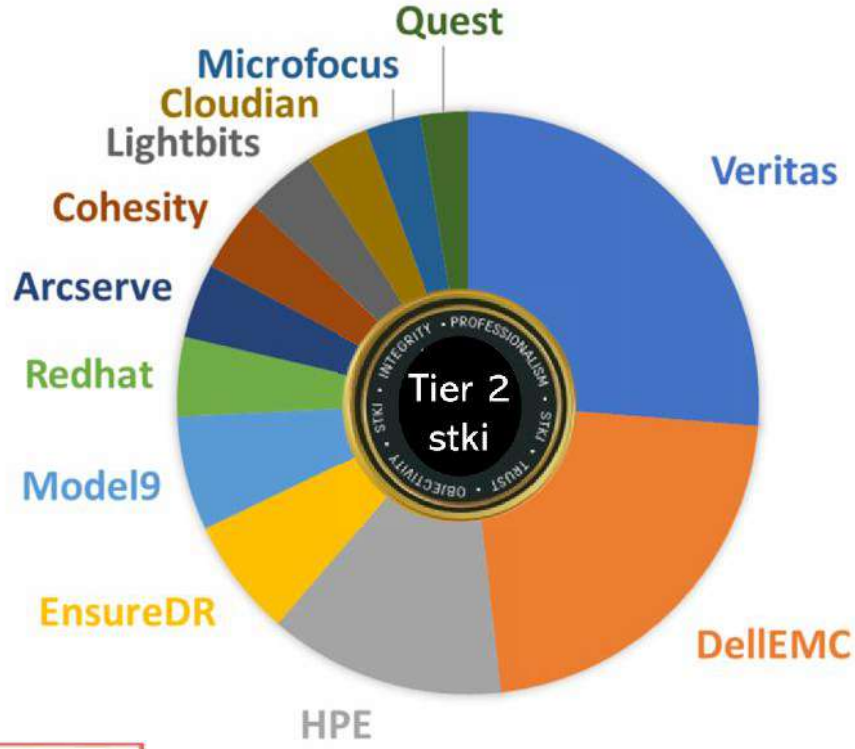
STORAGE & BACKUP SOFTWARE 114





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

Storage & Backup SW VARS ALPHABETICAL ORDER
aman
BeLocal
bezeq ben leumi
Bynet
emet
Hilan-Ness
I.E.Mittwoch
Kyndryl
Malam-Team
Matrix
one
TeraSky
Yael

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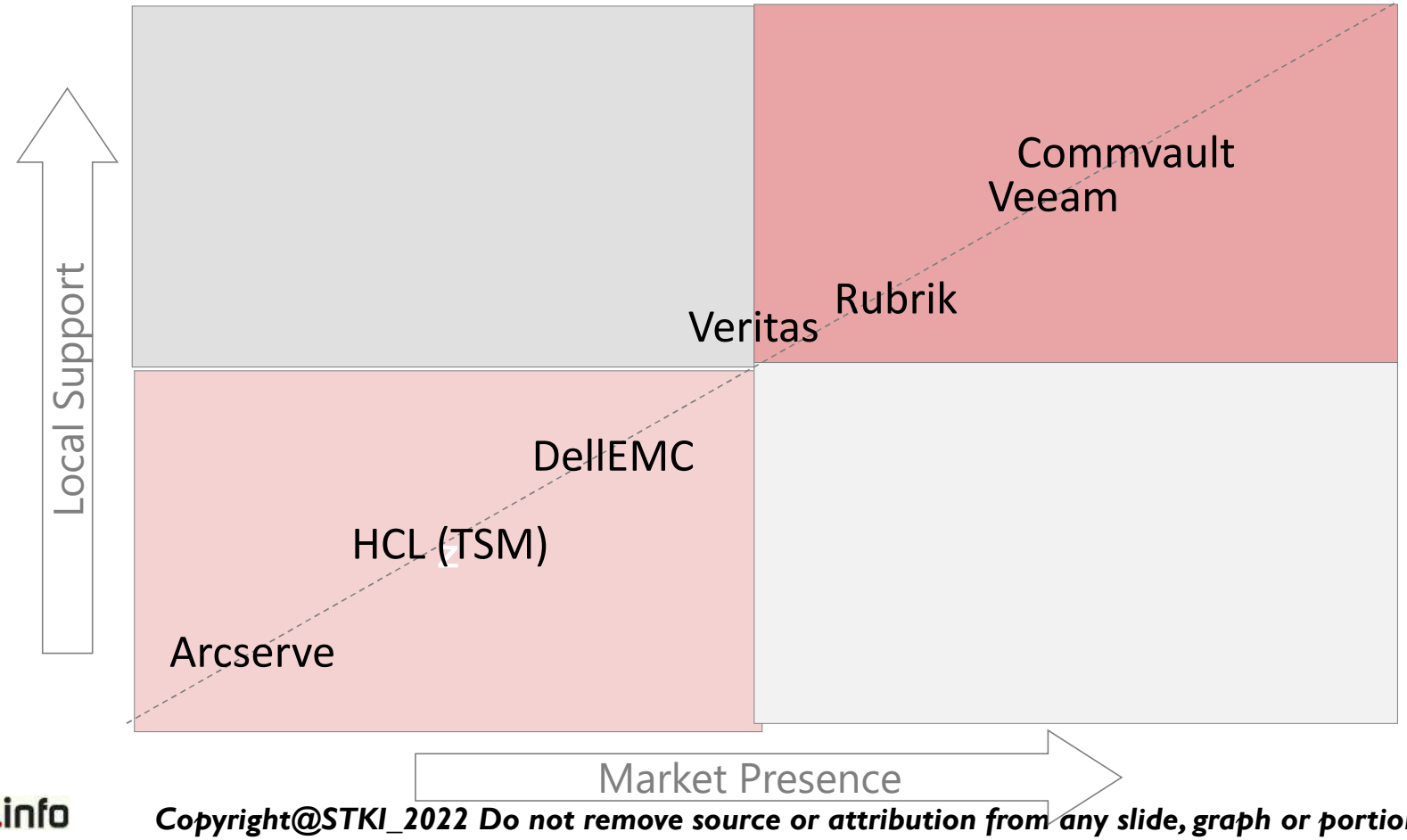
ENTERPRISE BACKUP

115



Brands in backup – SW, backup appliances (not "apples to apples")

Vendors to watch:
Microfocus
Cohesity

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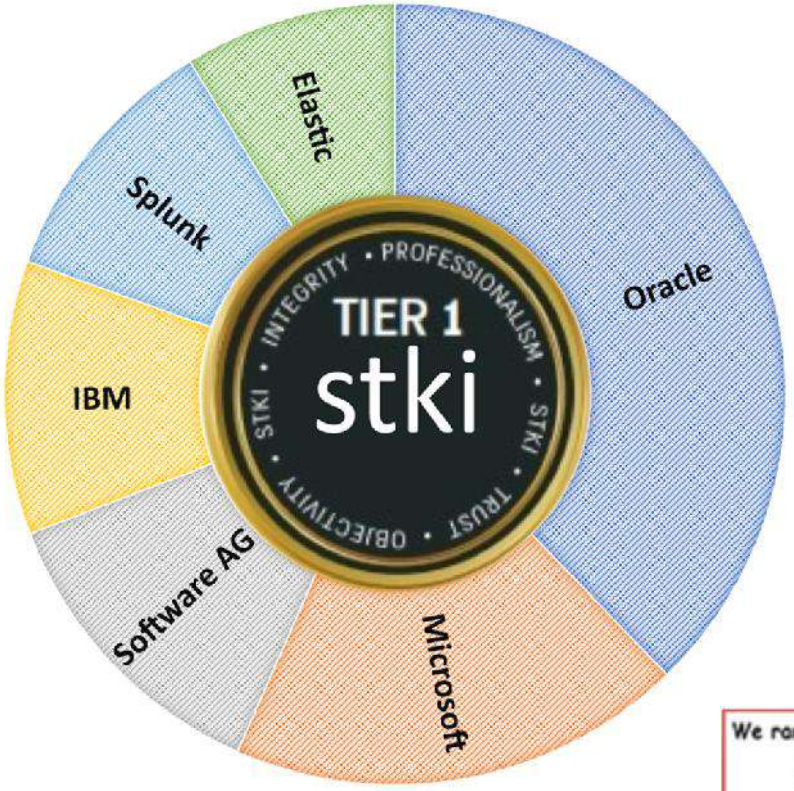
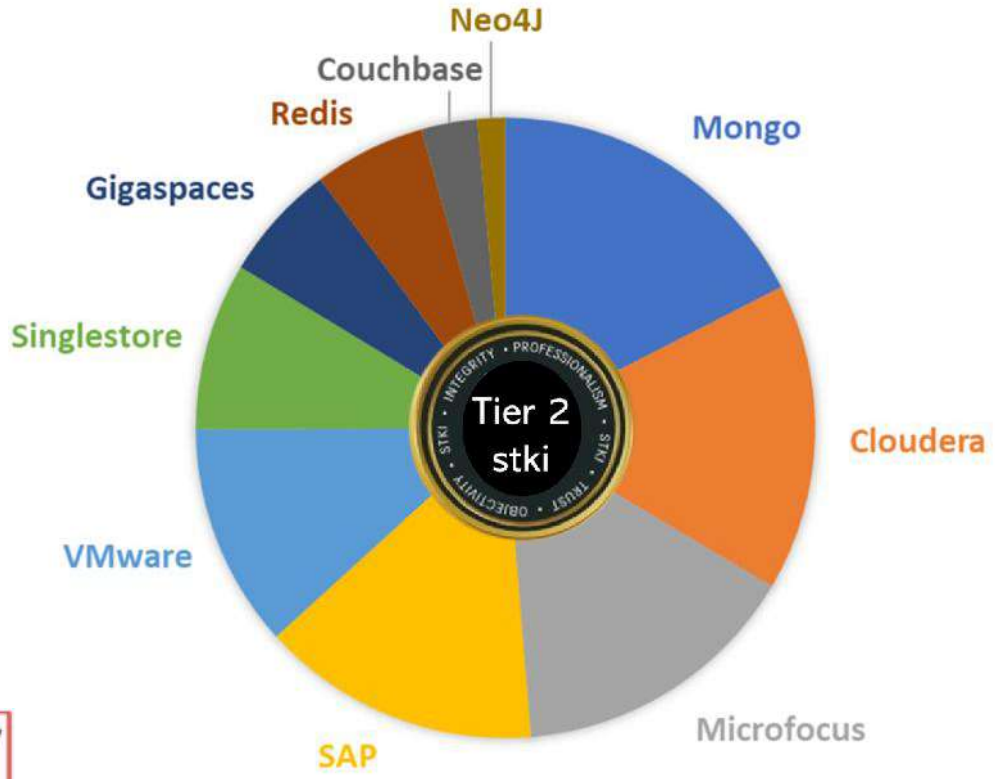
DATA PLATFORMS (SQL, NoSQL, DBMS) 116





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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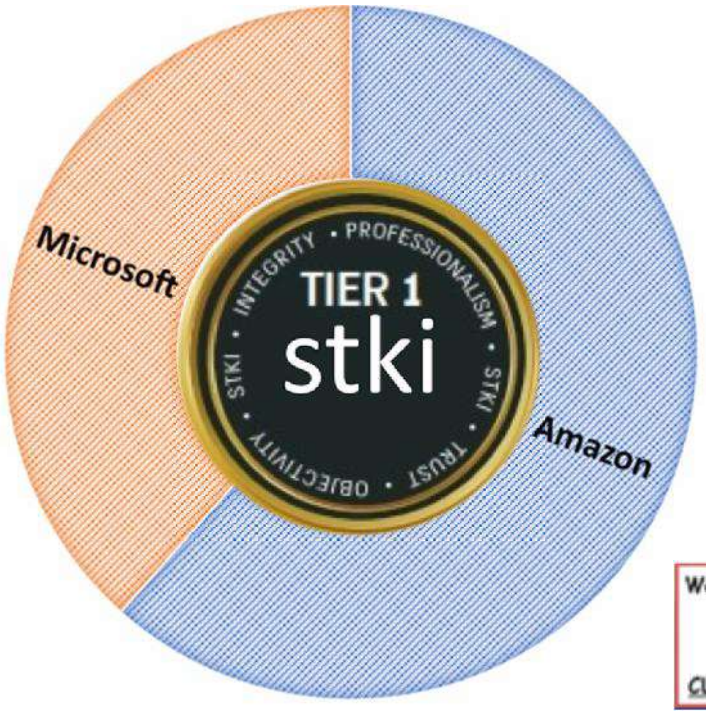
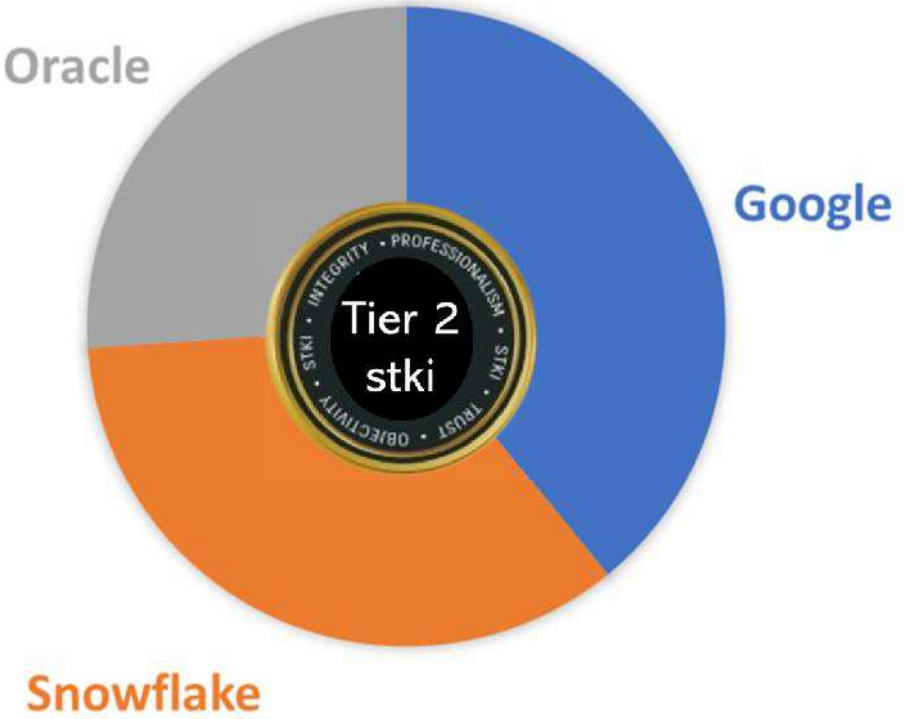
DATA PLATFORMS (SQL, NoSQL, DBMS) Cloud-based 117



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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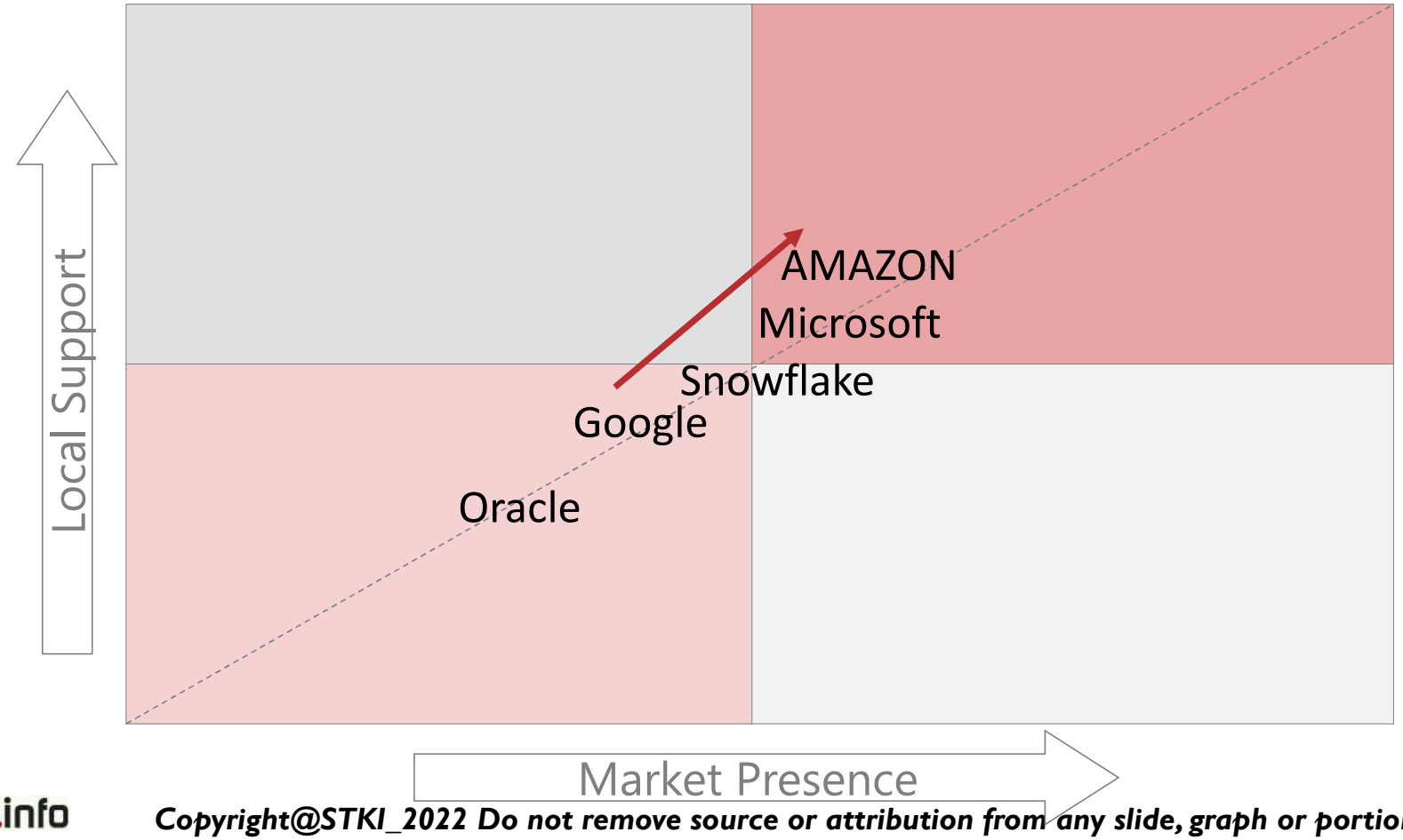
CLOUD DATA SERVICES

118



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MIDDLEWARE TOOL MARKET 2018-2022

119

	2018		2019		2020		2021		2022
App\WEB Server, BPM,, Emulation, , BRMS APaaS (container platforms)	$46.00	2.17%	$47.00	-4.26%	$45.00	4.44%	$47.00	6.38%	$50.00
ESB, SOA, FTP, Messaging, , Streaming, API Mngt	$12.50	4.00%	$13.00	15.38%	$15.00	6.67%	$16.00	12.50%	$18.00
TOTALS	$58.50	2.56%	$60.00	0.00%	$60.00	5.00%	$63.00	7.94%	$68.00

Values in Million USD

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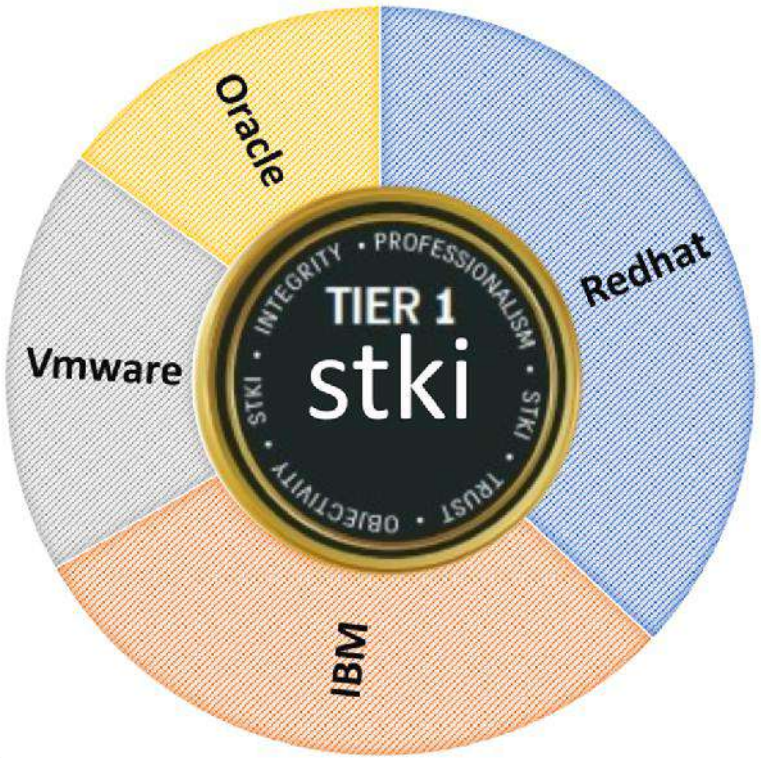
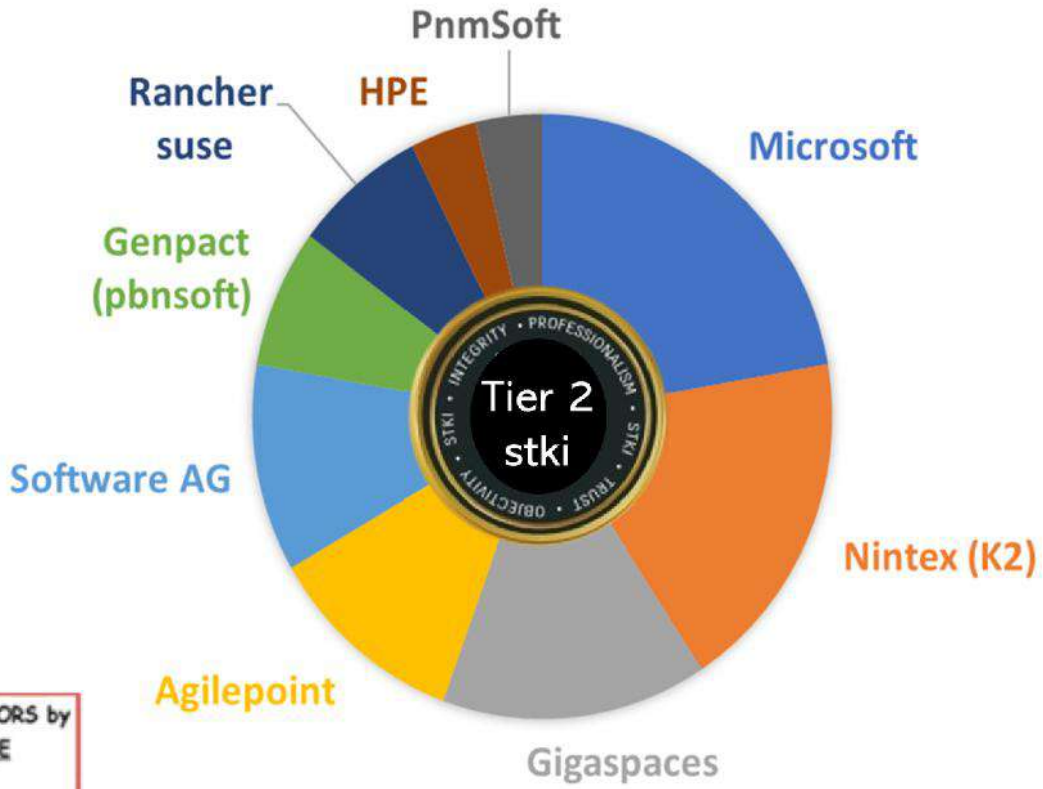
App\WEB Server, BPM, Emulation, BRMS APaaS (container platforms)

120





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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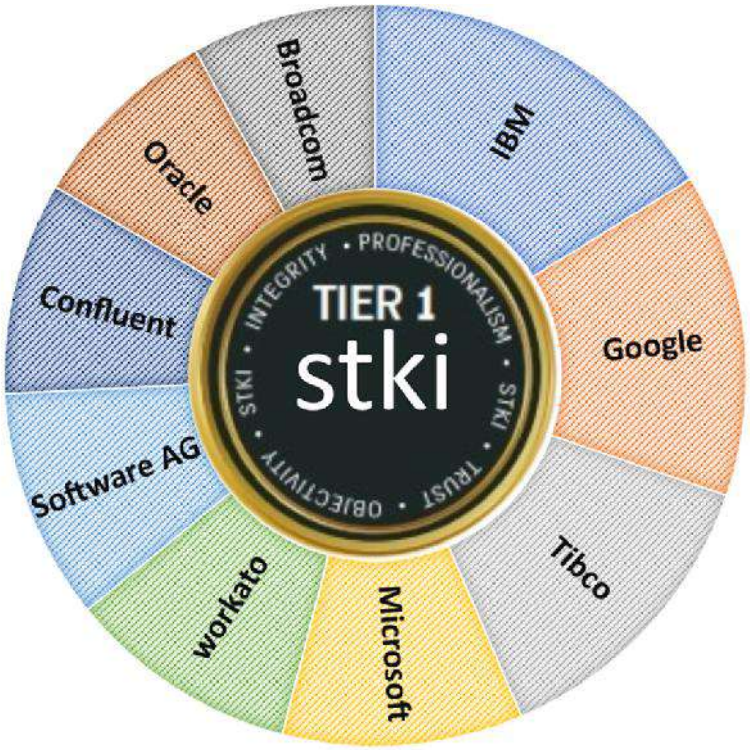
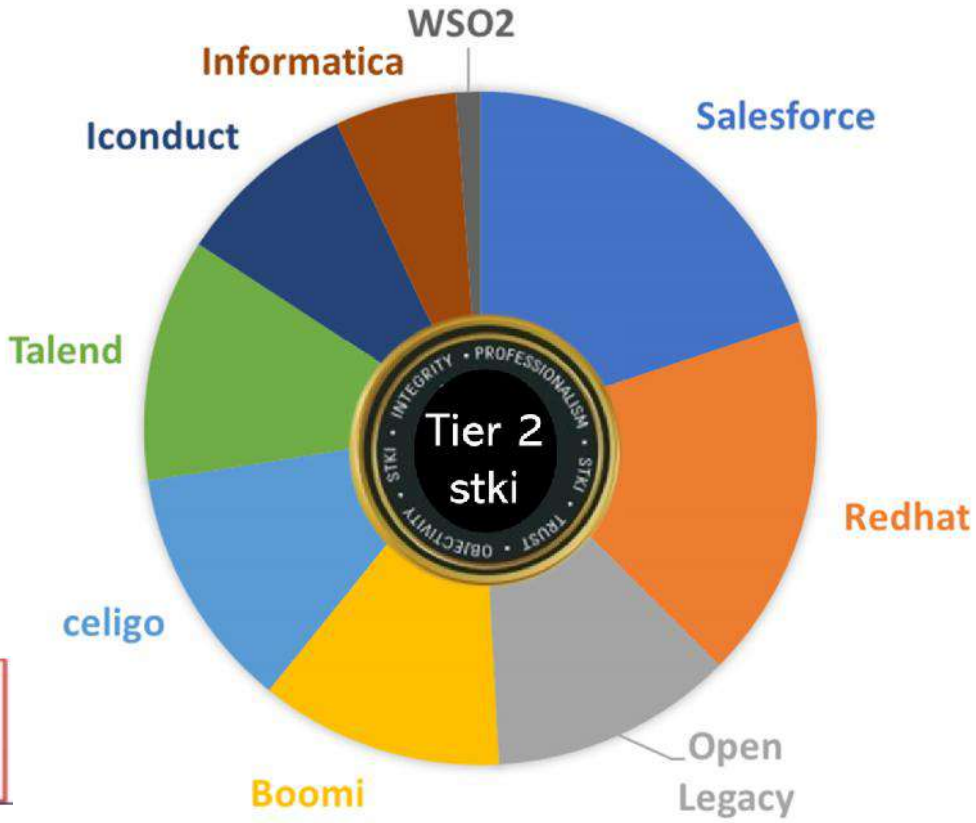
ESB, SOA, FTP, Messaging, , Streaming, API Mngt

121



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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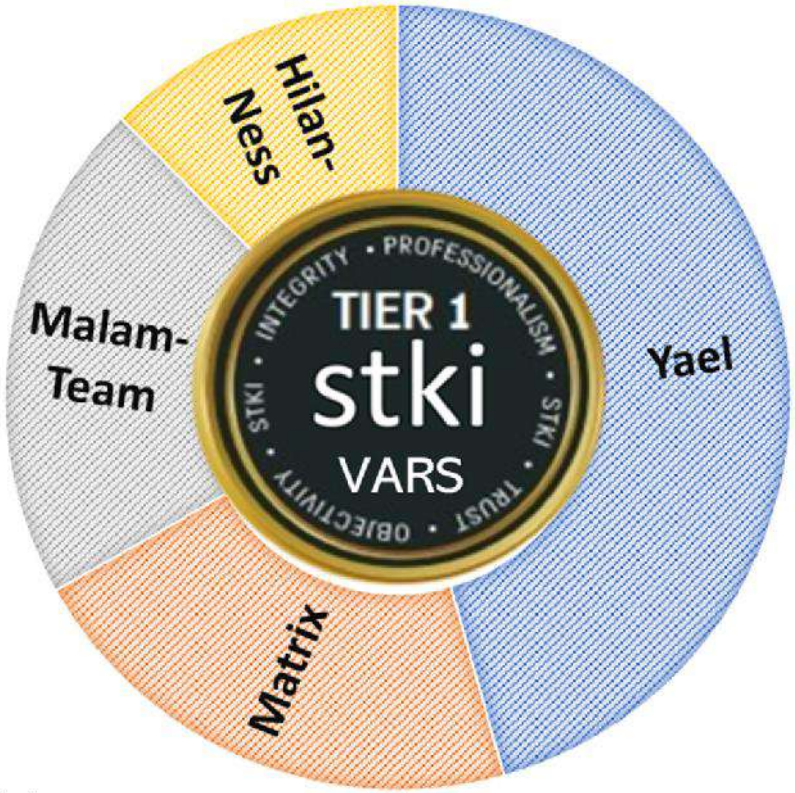
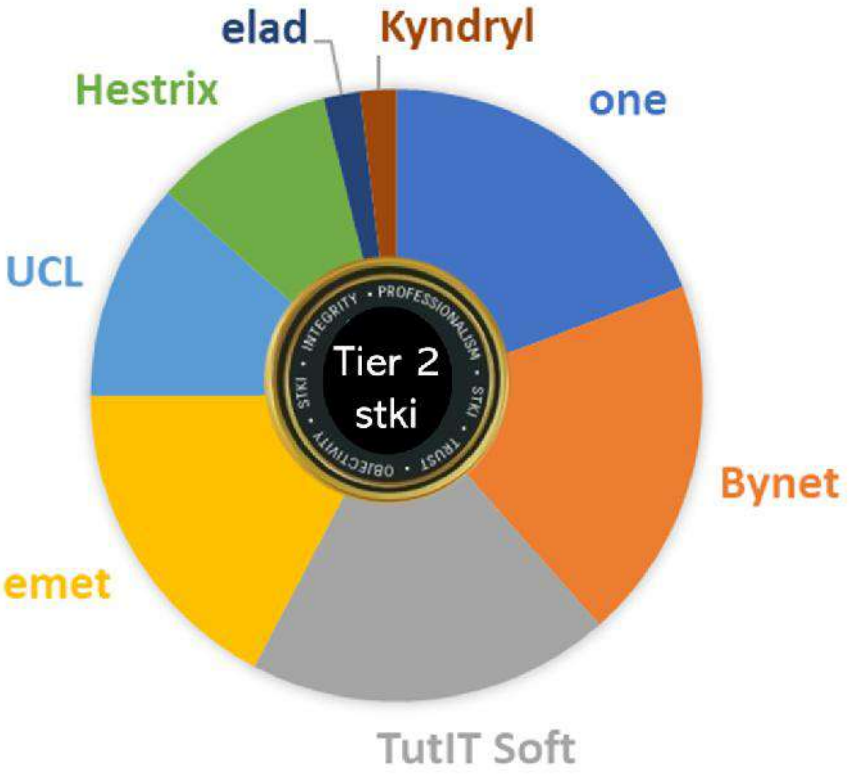
ESB, SOA, FTP, Messaging, , Streaming, API Mngt -- VARs





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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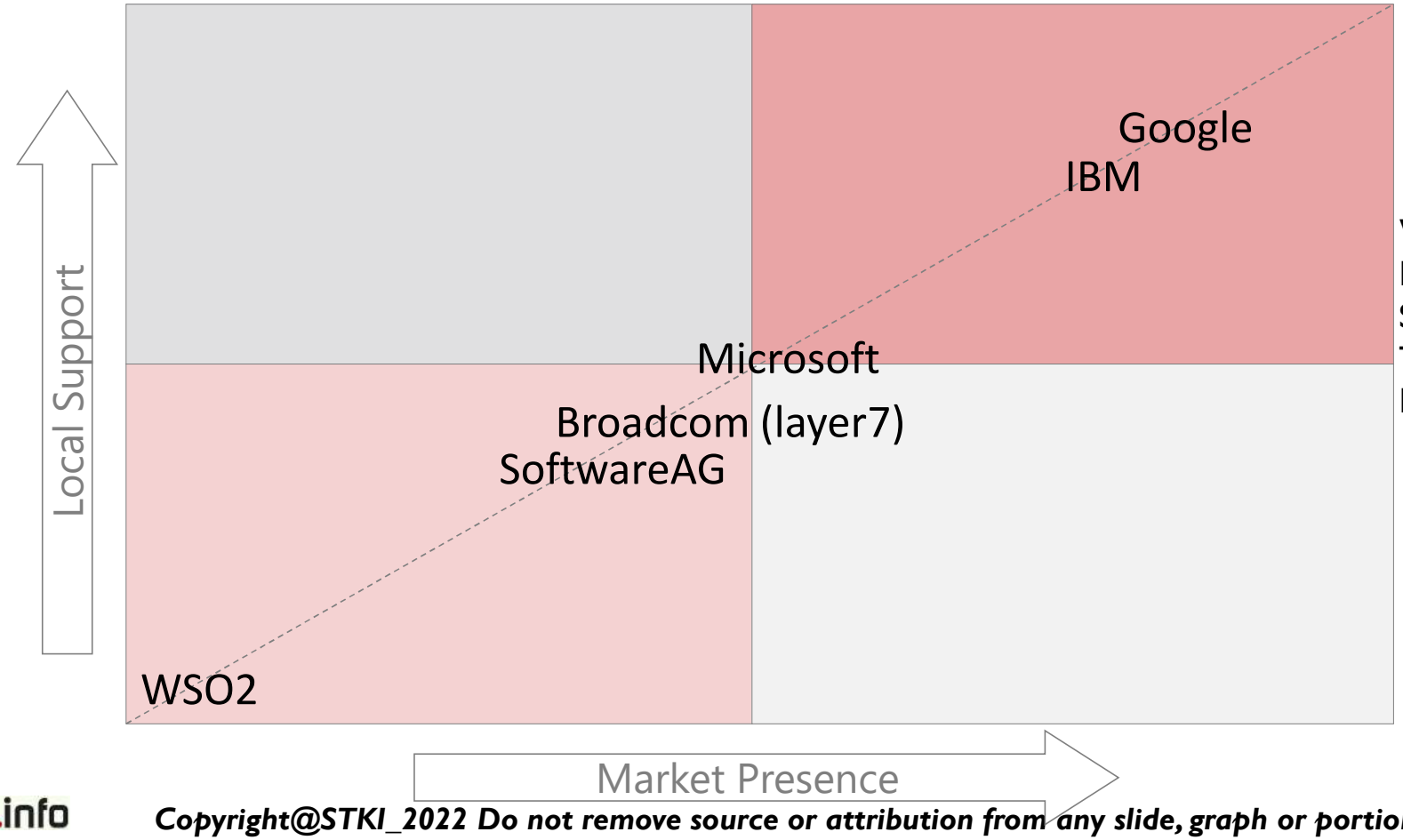
API MANAGEMENT (with on premise options) 123



Vendors to watch:
Redhat (3scale)
Salesforce (Mulesoft)
Tyk
KONG

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API MANAGEMENT (with on premise option) SELECTED INTEGRATORS 124

Vendor	Product	Israeli Rep.	Integrators
IBM	API Connect	IBM	Matrix, Ellipsis
Google	APIGEE	Google Israel	Yael Software
Tibco	Mashary		Yael Software
Redhat	3Scale	Redhat Israel	Matrix
Broadcom	Layer7	Ness Pro	Ness Pro, Emet
SoftwareAG	WebMethods API mng.	SoftwareAG Israel	
Tyke		EL-AZ	

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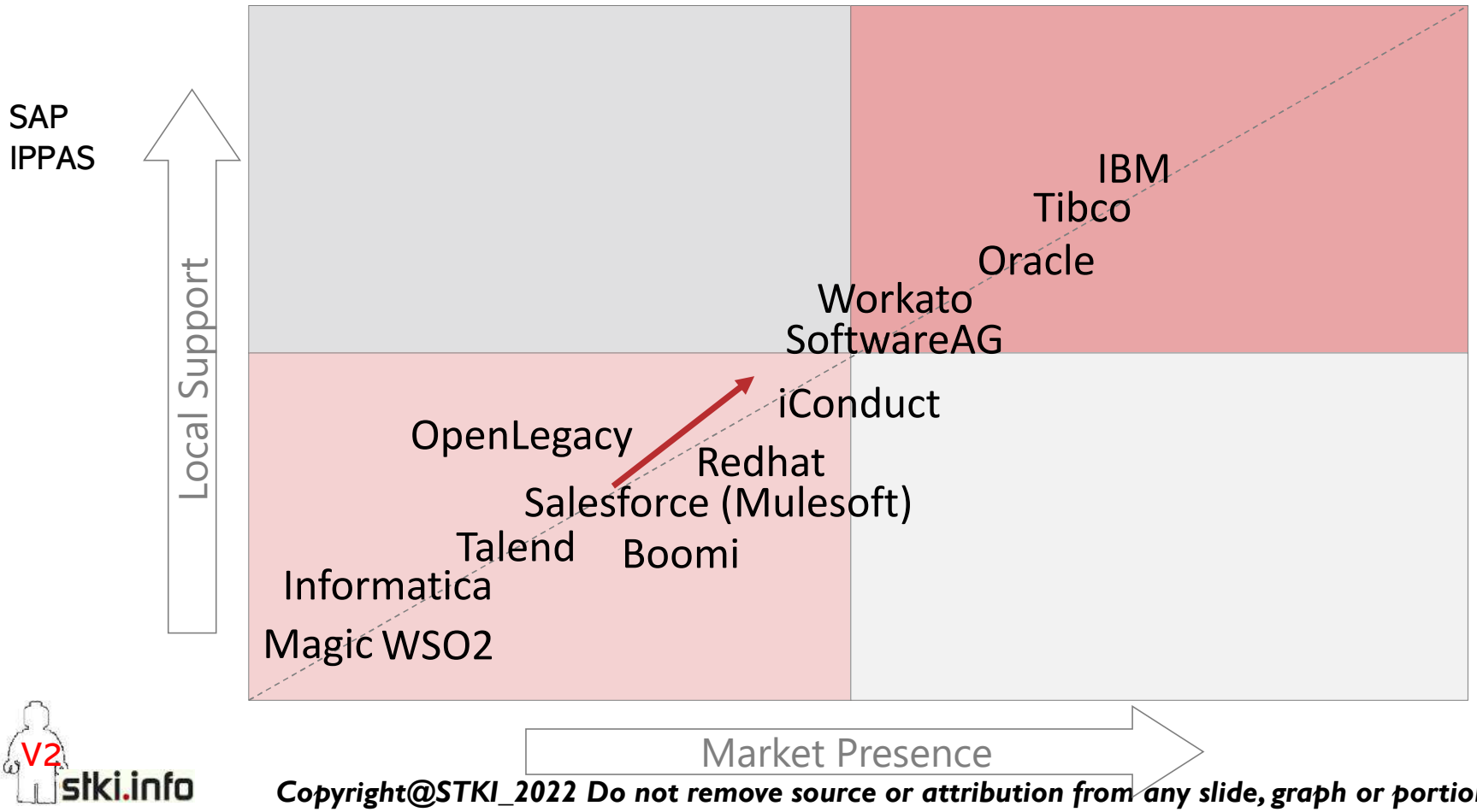
APPLICATION INTEGRATION

125



Brands in Application integration include ESB, IPaaS, Hybrid integration etc. (not "apples to apples")

Vendors to watch:
Celigo
Integromat

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APPLICATION INTEGRATION SELECTED INTEGRATORS 126

Vendor	Product	Israeli Rep.	Integrators
IBM	WMB Websphere Message Broker	IBM	Matrix, Ellipsis
Iconduct	Iconduct	Iconduct	Ness Pro One
Tibco	BusinessWorks		Yael Software
Redhat	Fuse	Redhat Israel	Matrix
Workato	Workato		ELAD, Malam
SoftwareAG	WebMethods	SoftwareAG Israel	One
Oracle	OSB	Oracle Israel	Malam One
Magic	XPI	Magic Israel	Malam
WSO2	WSO2 Enterprise Integrator		Matrix

Open source

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APPLICATION INTEGRATION SELECTED INTEGRATORS 2

Vendor	Product	Israeli Rep.	Integrators
OpenLegacy	OpenLegacy	OpenLegacy	Ness
Talend	Talend Integration		UCL
Informatica	Informatica PowerCenter		Aman
Celigo	Integrator.io		SangIT

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IT MANAGEMENT & OPERATIONS TOOLS MARKET 2018-2022

	2018		2019		2020		2021		2022
IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling *excluding* ITSM, Service Desk	$80.00	5.62%	$84.50	-5.33%	$80.00	-6.25%	$75.00	6.67%	$80.00
ITSM - Service Desk	$24.00	10.42%	$26.50	-16.98%	$22.00	13.64%	$25.00	8.00%	$27.00
TOTALS	$104.00	6.73%	$111.00	-8.11%	$102.00	-1.96%	$100.00	7.00%	$107.00

Values in Million USD

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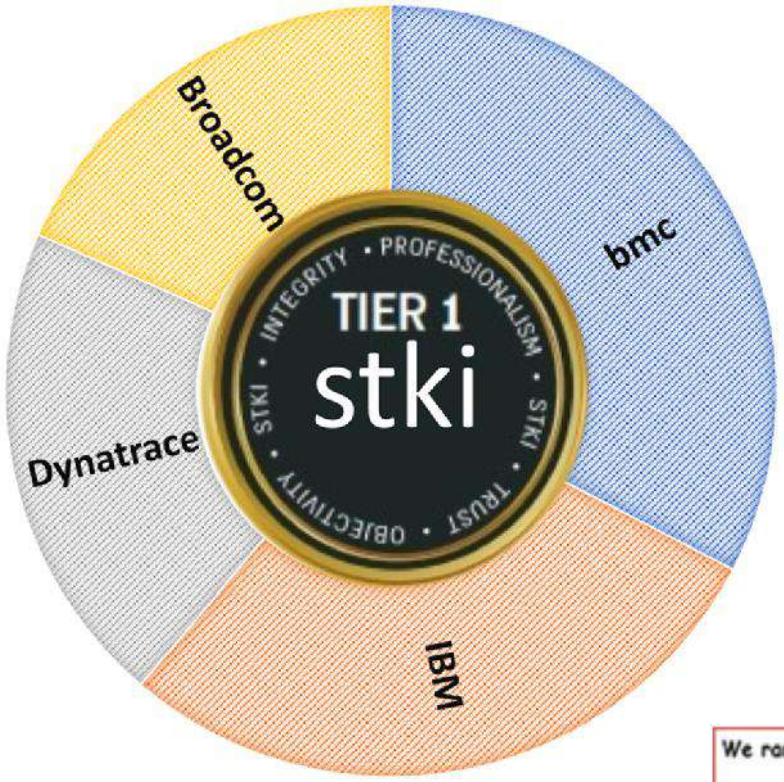
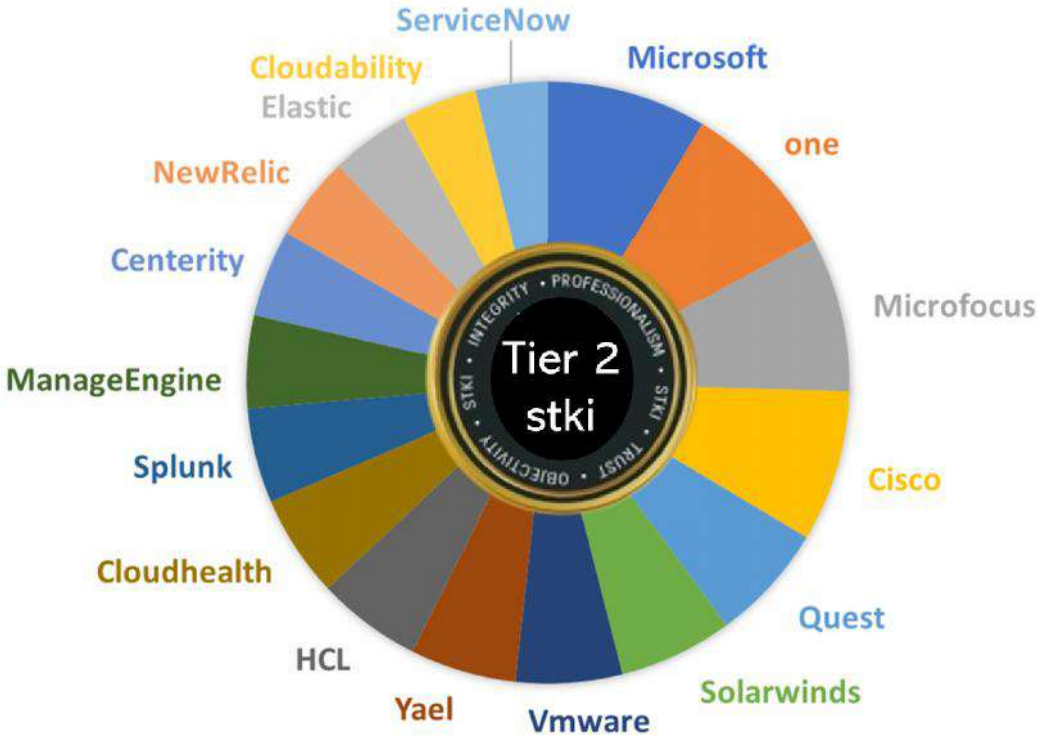
IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling (excluding ITSM, Service Desk)

129



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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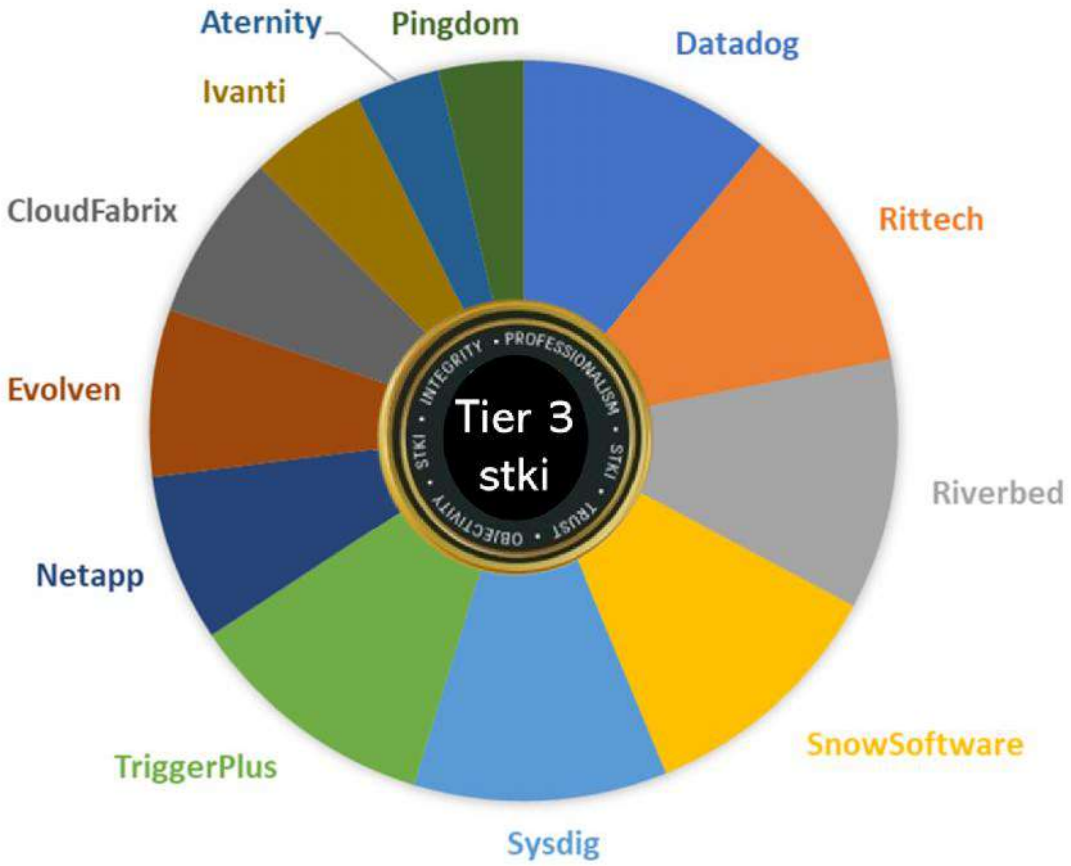
IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling (excluding ITSM, Service Desk)

130



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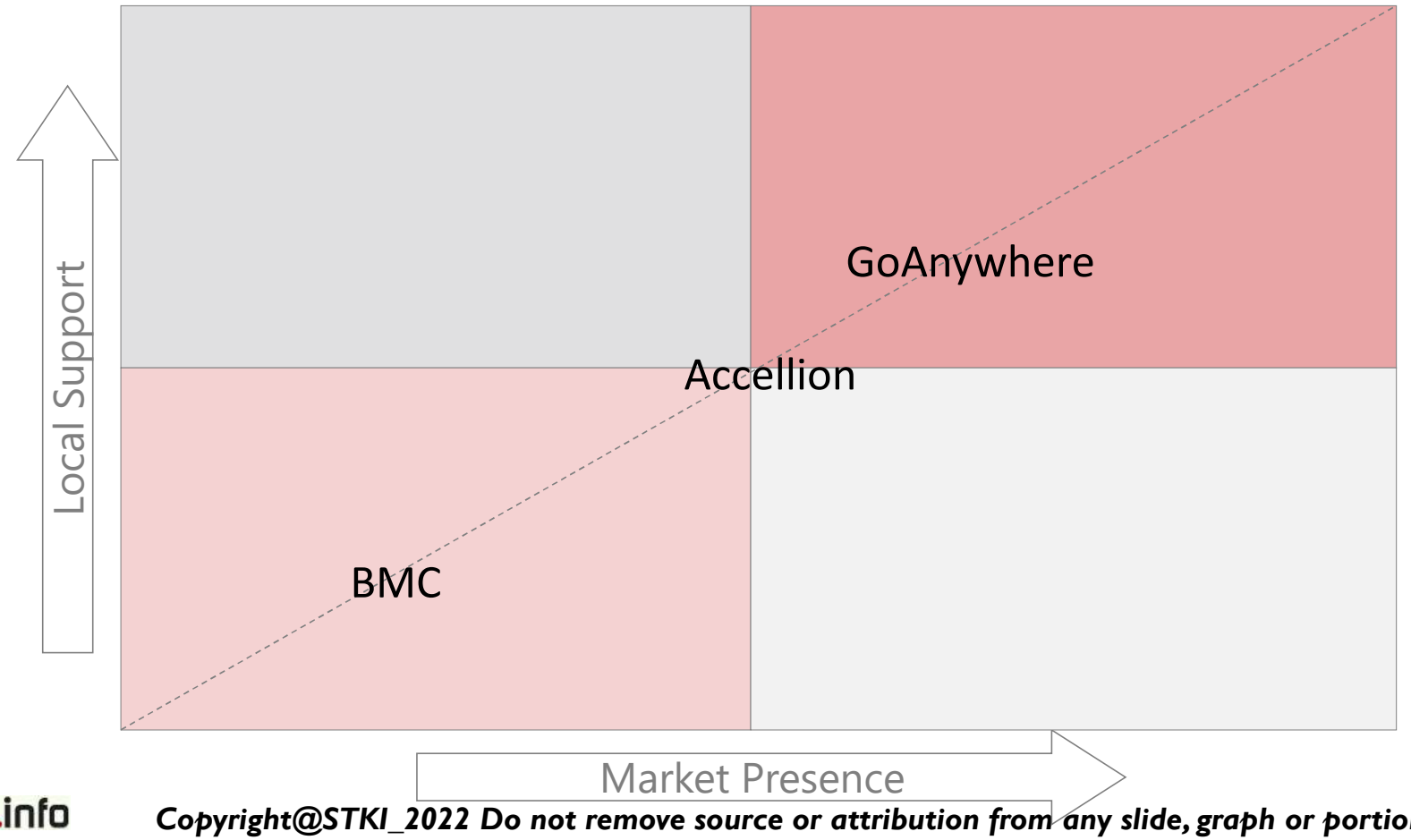
B2B VAULTS (replacing CyberArk vaults) 131



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IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling (excluding ITSM, Service Desk) VARs

VARS ALPHABETICAL ORDER

- almtoolbox
- bezeq ben leumi
- Bynet
- Commugen
- Dbart
- Head-on
- Hilan-Ness
- I.E.Mittwoch
- KMC
- Kyndryl
- Log-On
- Malam-Team
- Matrix
- one
- TechMind
- Yael

We rank VENDORS by REVENUE and CLIENT MINDSHARE

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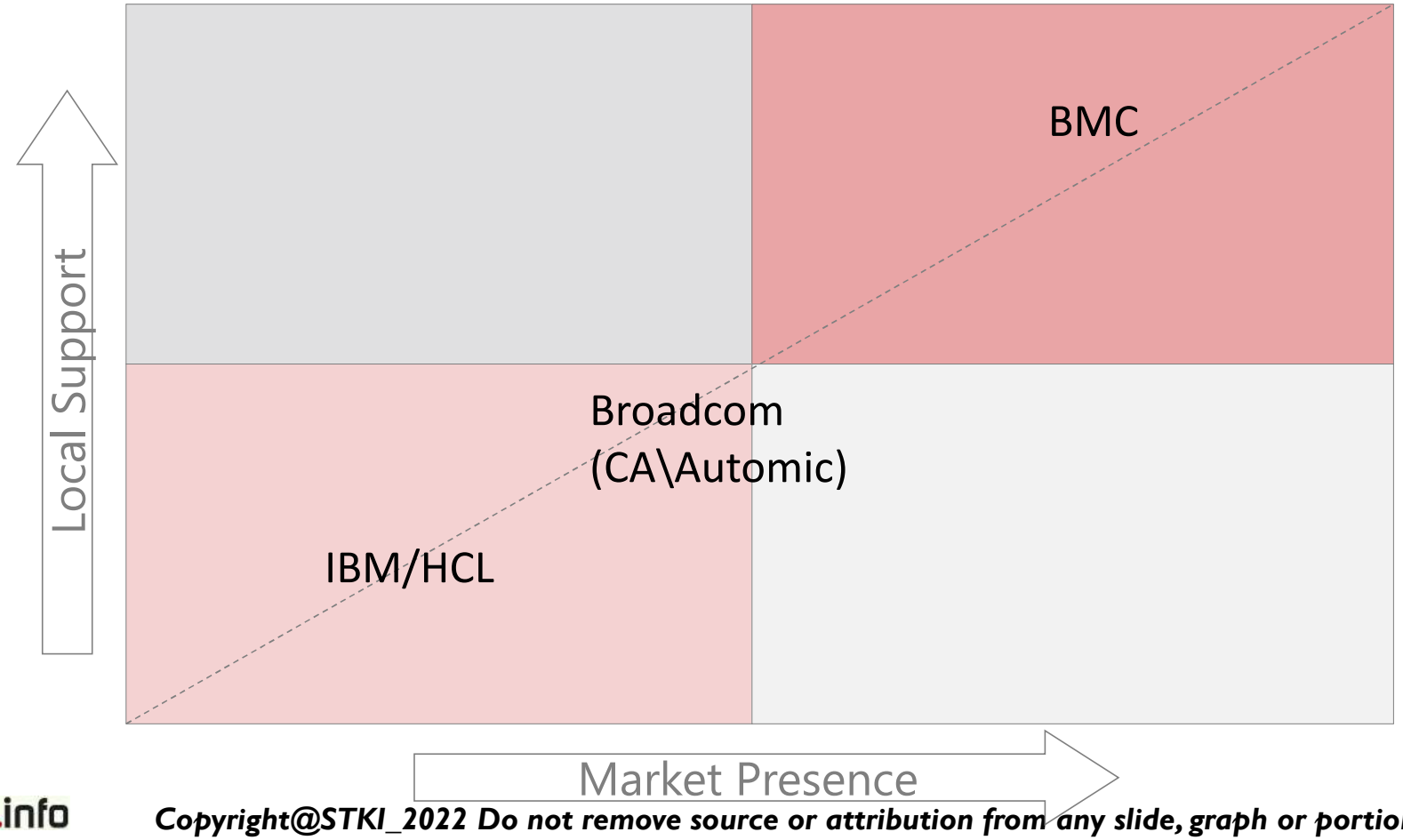
JOB SCHEDULING

133



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JOB SCHEDULING SELECTED INTEGRATORS 134

Vendor	Product	Israeli Rep.	Integrators
BMC	Control-M	BMC	Matrix
Broadcom	Automic	Broacdom Israel	Ness Pro
IBM/HCL	IBM/HCL workload manager	IBM	Matrix, Emet

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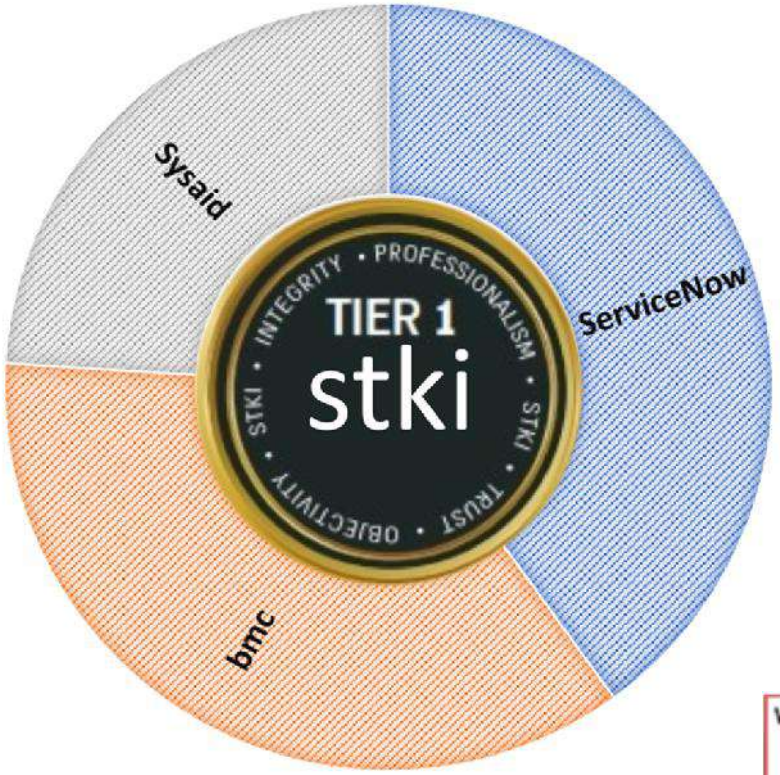
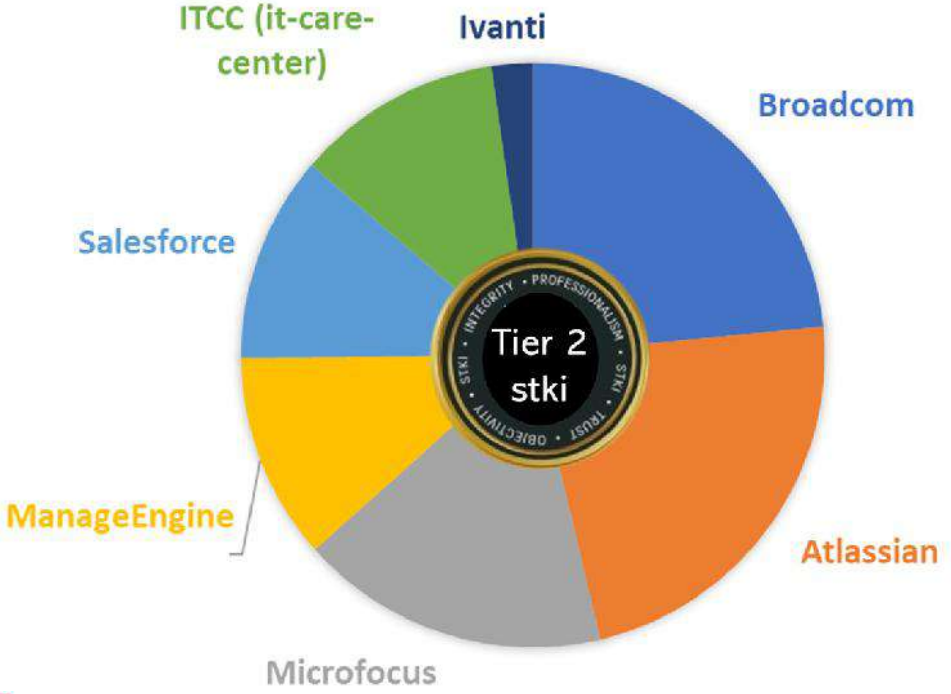
ITSM - Service Desk

135





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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ITSM - Service Desk VARs

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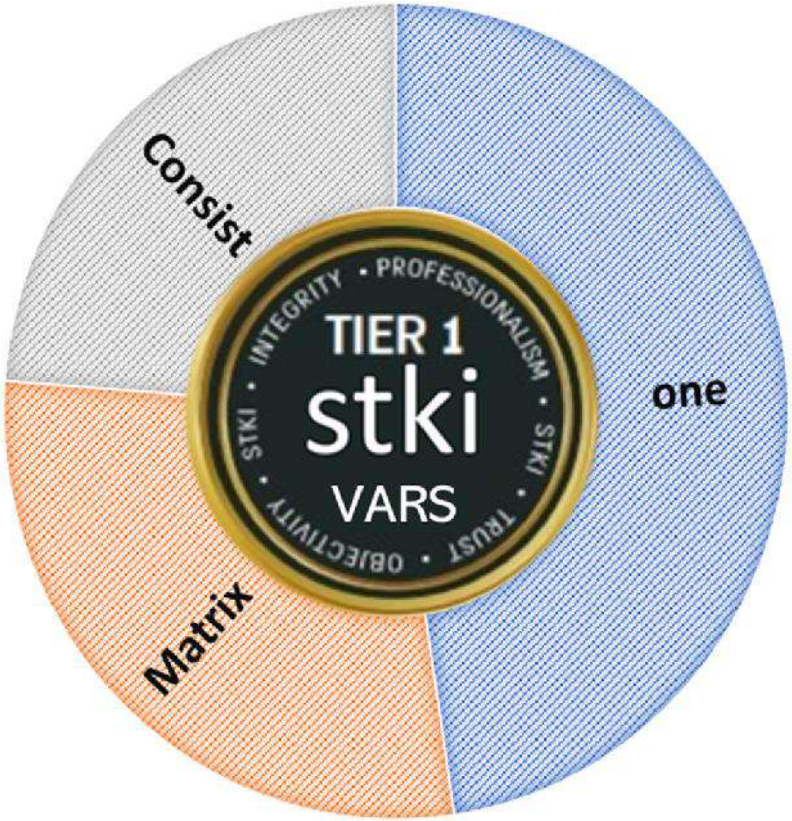

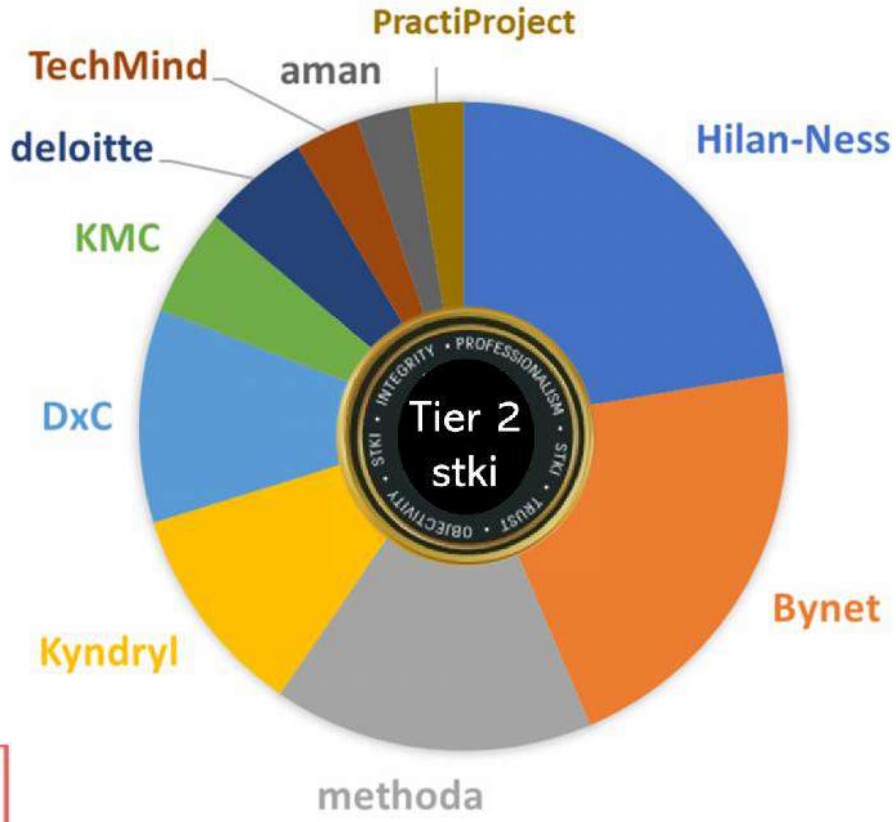

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SECURITY (CYBER) TOOLS MARKET 2018-2022 137

	2018		2019		2020		2021		2022
Endpoint related tools	$43.50	5.75%	$46.00	15.22%	$53.00	3.77%	$55.00	3.64%	$57.00
Network\Web cloud services (FW, WAF, ddos services , etc.)	$75.00	6.00%	$79.50	10.69%	$88.00	4.55%	$92.00	7.61%	$99.00
data content related tools (DLP, DB FW, DLP Halbana, etc.)	$32.50	10.77%	$36.00	2.78%	$37.00	8.11%	$40.00	5.00%	$42.00
cyber management tools (SIEM tool, Incident responds, automation)	$33.00	6.06%	$35.00	2.86%	$36.00	15.28%	$41.50	3.61%	$43.00
Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access	$20.00	5.00%	$21.00	4.76%	$22.00	4.55%	$23.00	17.39%	$27.00
Other cyber tools (secure development, awareness etc.)	$11.00	4.55%	$11.50	4.35%	$12.00	4.17%	$12.50	4.00%	$13.00
TOTALS	$215.00	6.51%	$229.00	8.30%	$248.00	6.45%	$264.00	6.44%	$281.00

Values in Million USD

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Endpoint related tools

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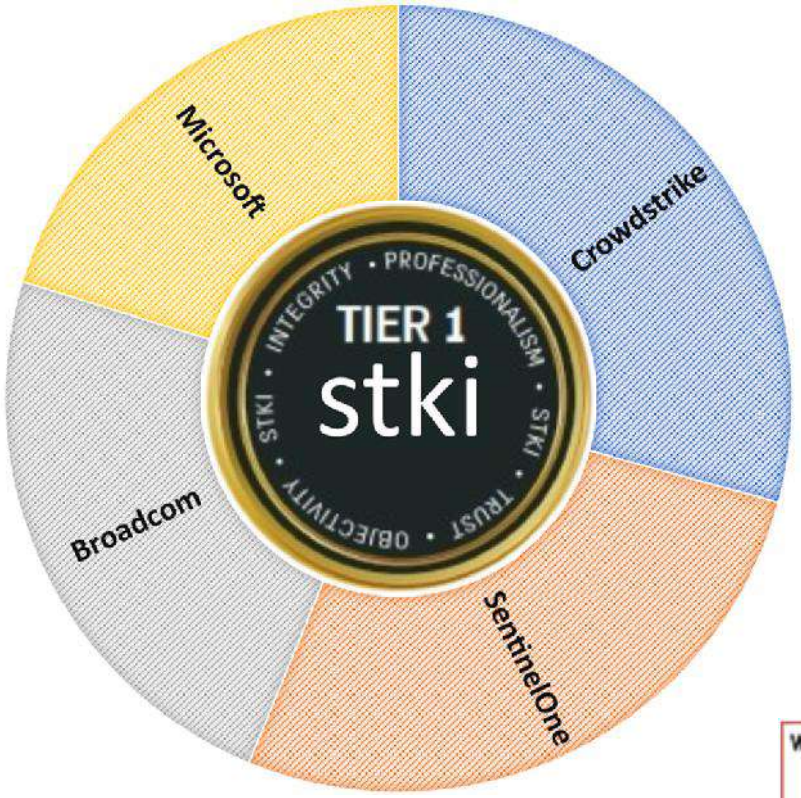

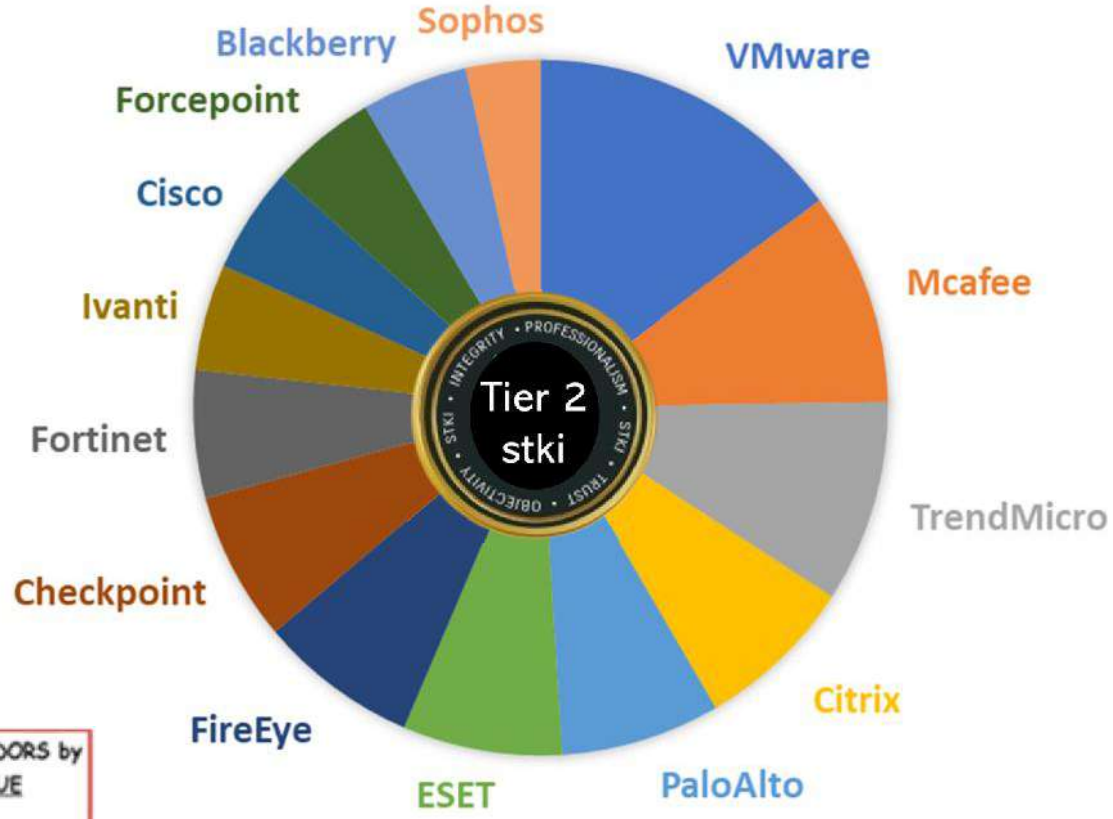

We rank VENDORS by
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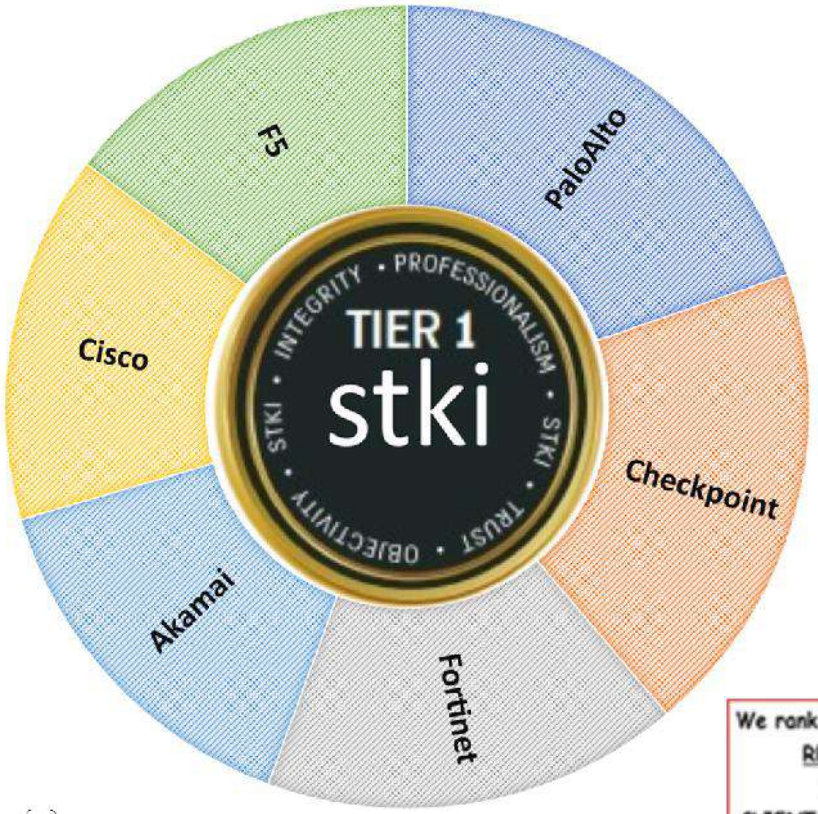
Network\Web cloud services (FW, WAF, DDOS services , etc.)

139



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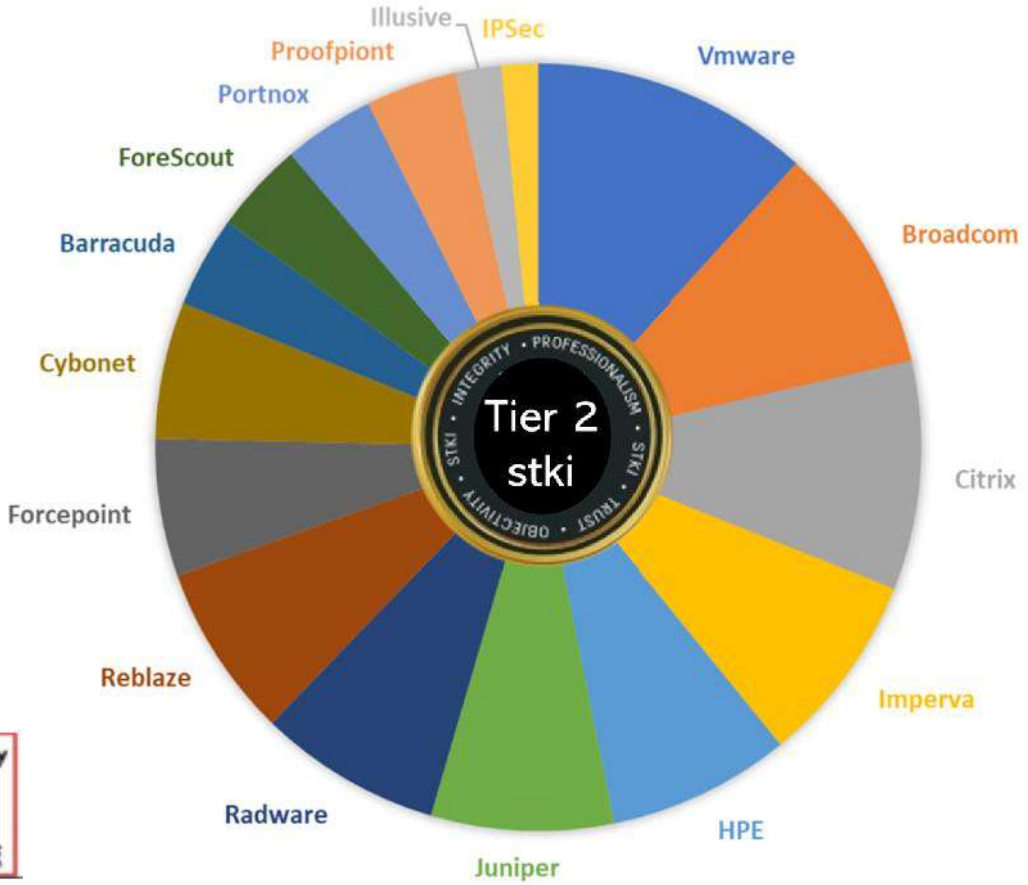
REVENUE
and
CLIENT MINDSHARE



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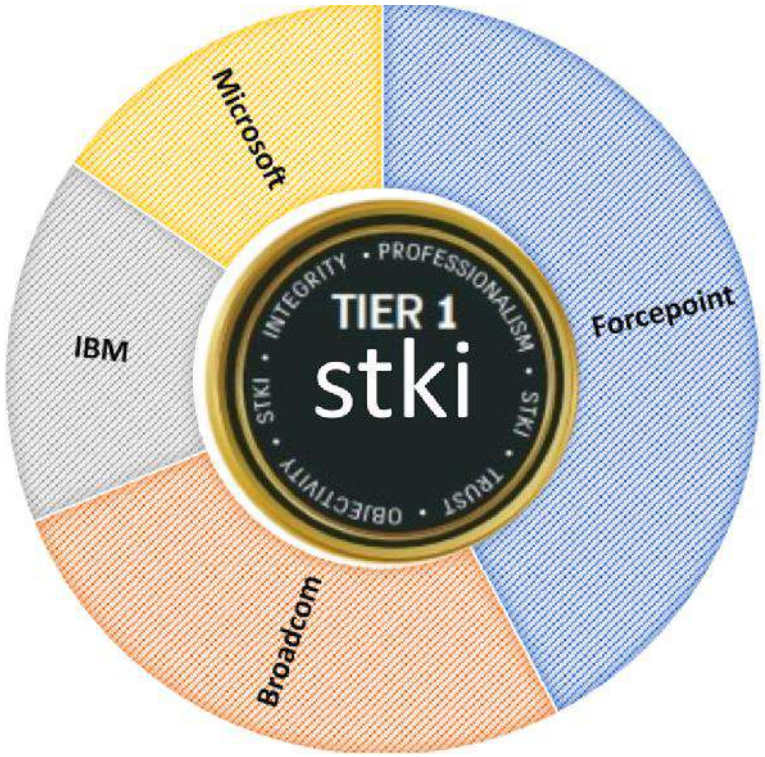
Data Content Related Tools (DLP, DB FW, DLP (*Halbana*) etc.)



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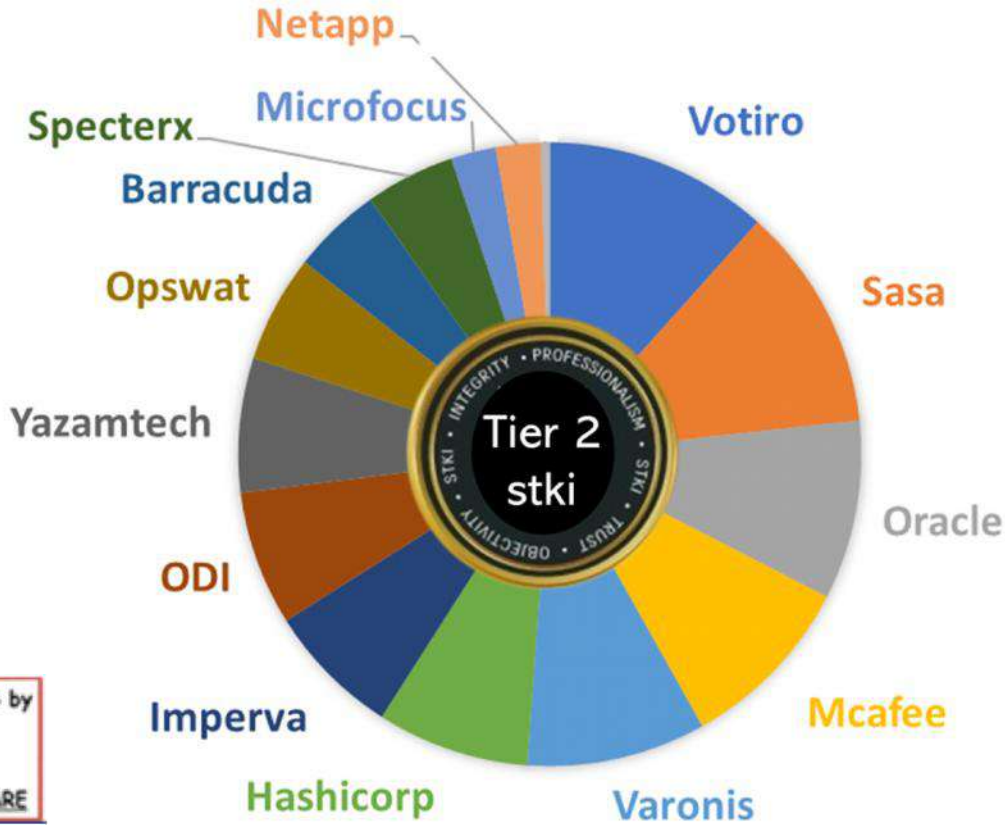

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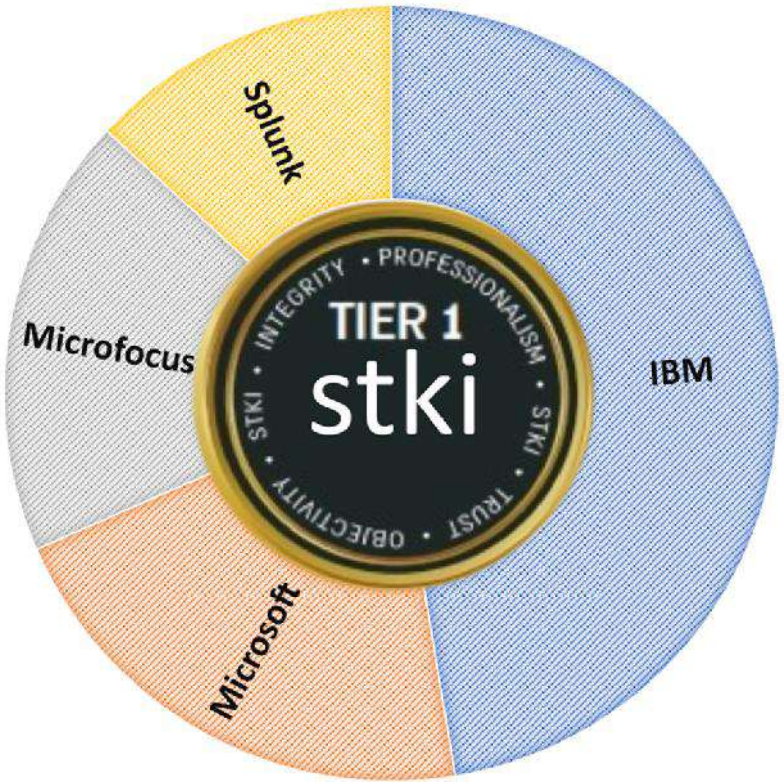
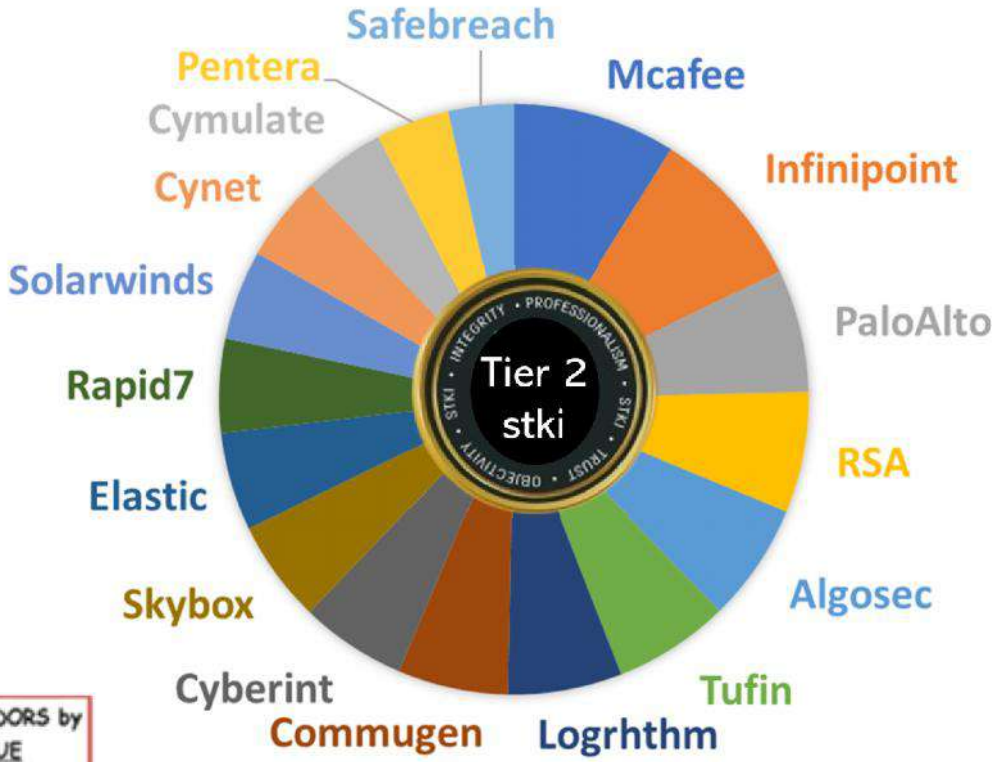
CYBER MANAGEMENT TOOLS (SIEM tools, incident responds, automation)

141





We rank VENDORS by REVENUE and CLIENT MINDSHARE

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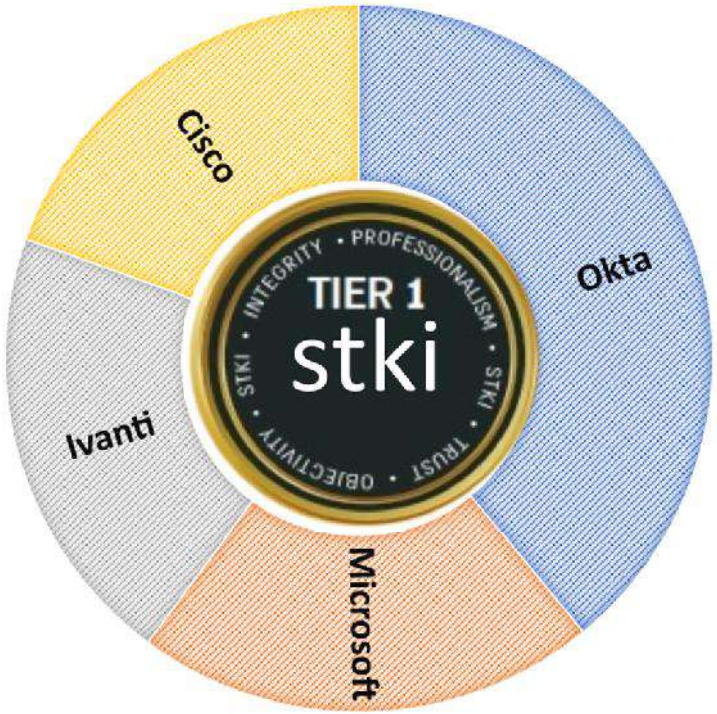
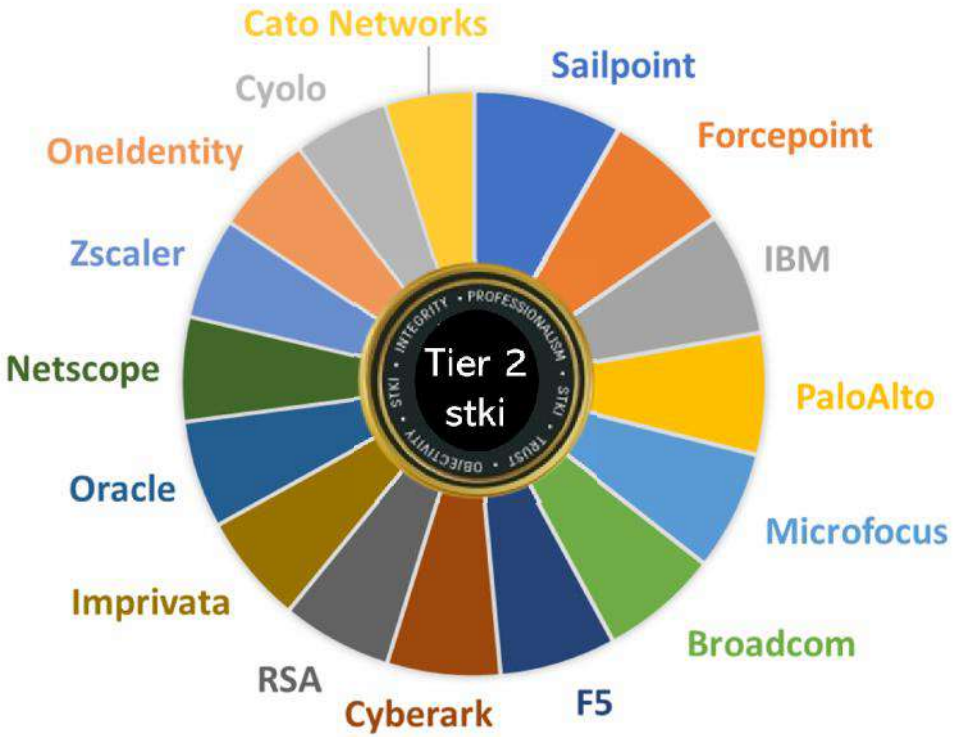
Zero Trust including Identity, Access, SASE (secure access service edge) IDM, PAM

142





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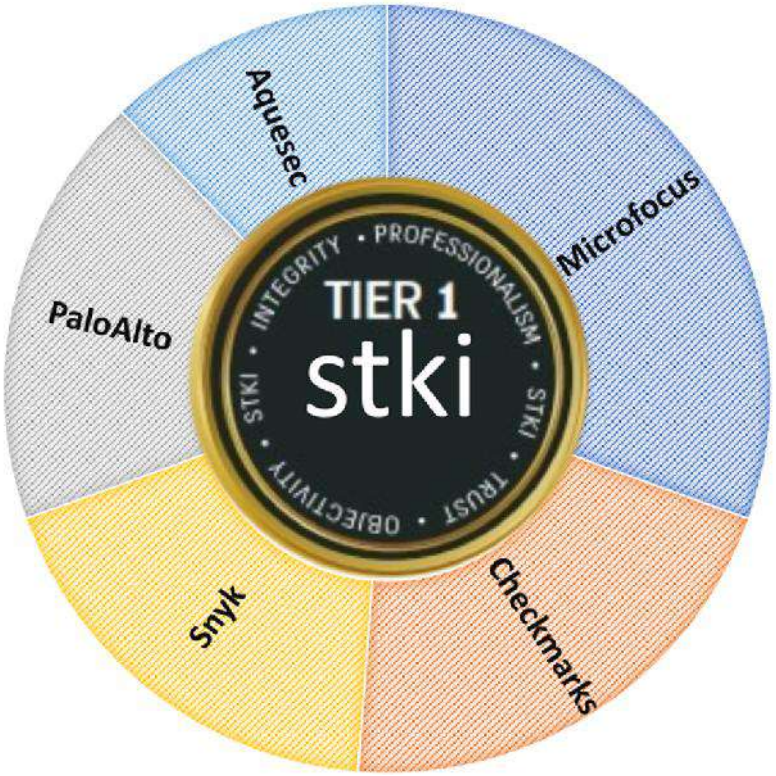
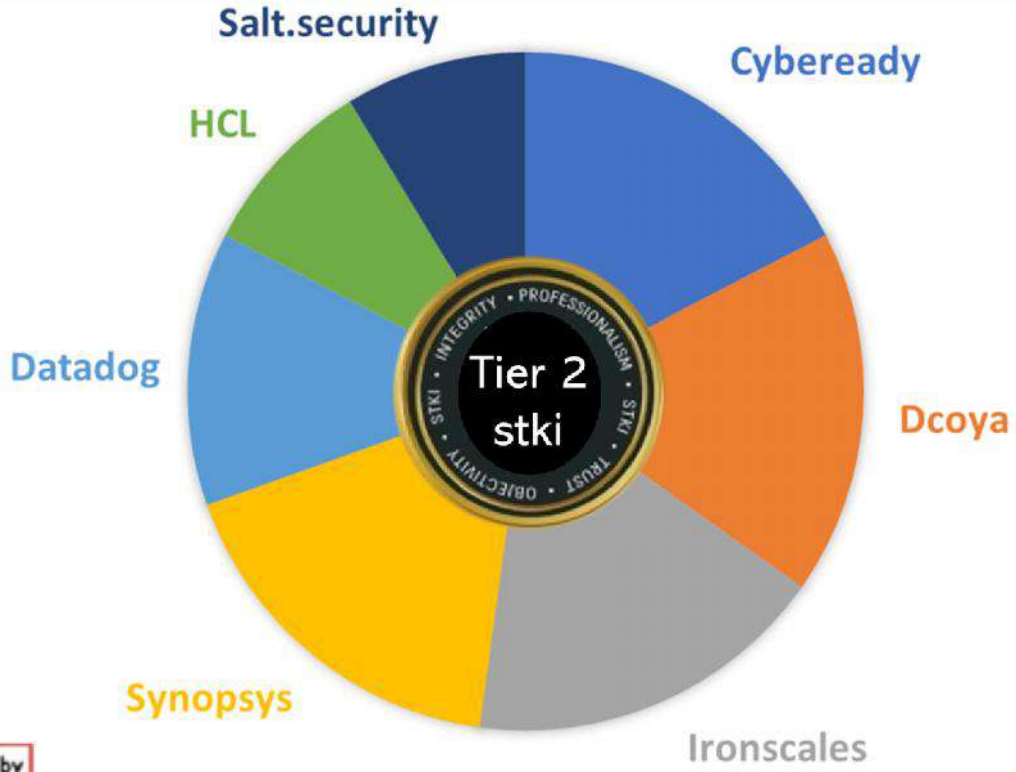
other cyber tools (secure development, awareness etc.) 143





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PROJECT DEVELOPMENT & MANAGEMENT TOOLS MARKET 2018-2022

144

	2018		2019		2020		2021		2022
Project & Portfolio Management	$28.00	3.57%	$29.00	-13.79%	$25.00	-12.00%	$22.00	-9.09%	$20.00
Development tools, ALM, Devops for all environments (including Mobile)	$74.00	2.70%	$76.00	-14.47%	$65.00	7.69%	$70.00	2.86%	$72.00
Low Code tools	$2.00	115.00%	$4.30	39.53%	$6.00	50.00%	$9.00	33.33%	$12.00
TOTALS	$104.00	5.10%	$109.30	-12.17%	$96.00	5.21%	$101.00	2.97%	$104.00

Values in Million USD

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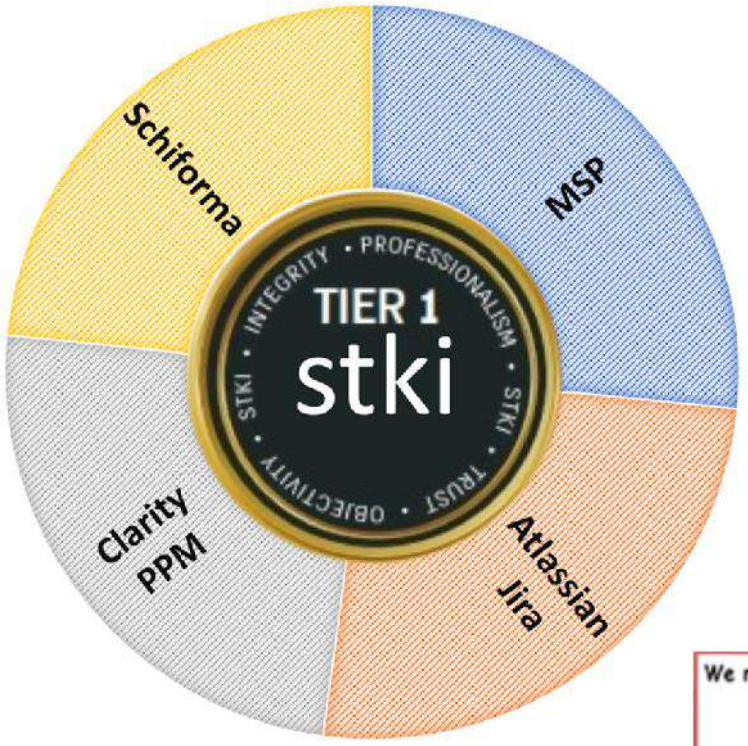
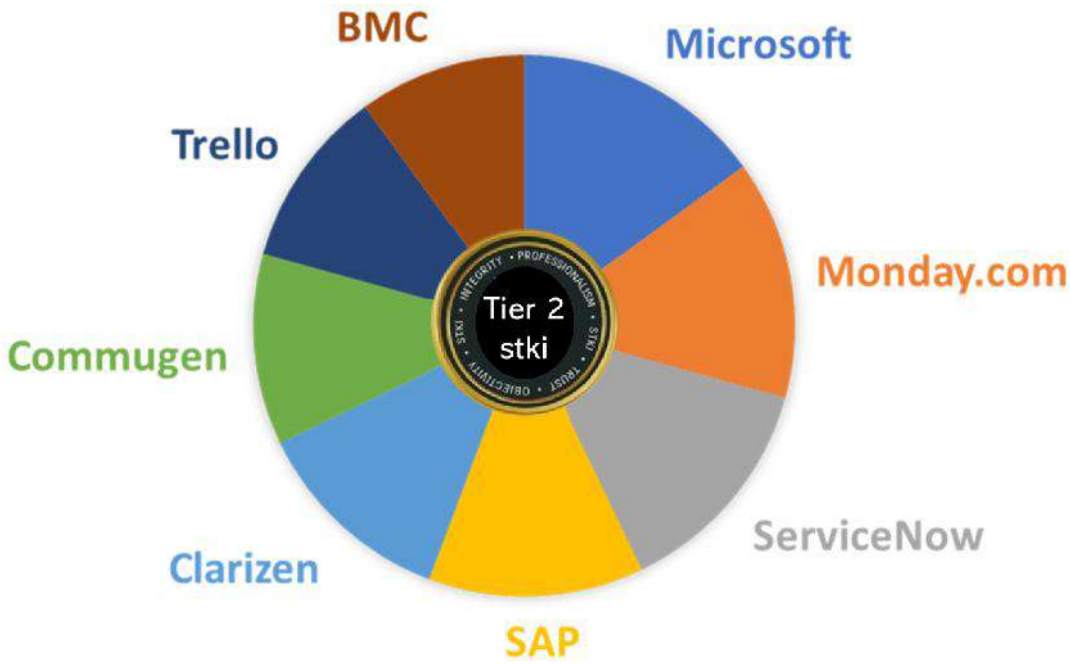
Project & Portfolio Management Tools 145



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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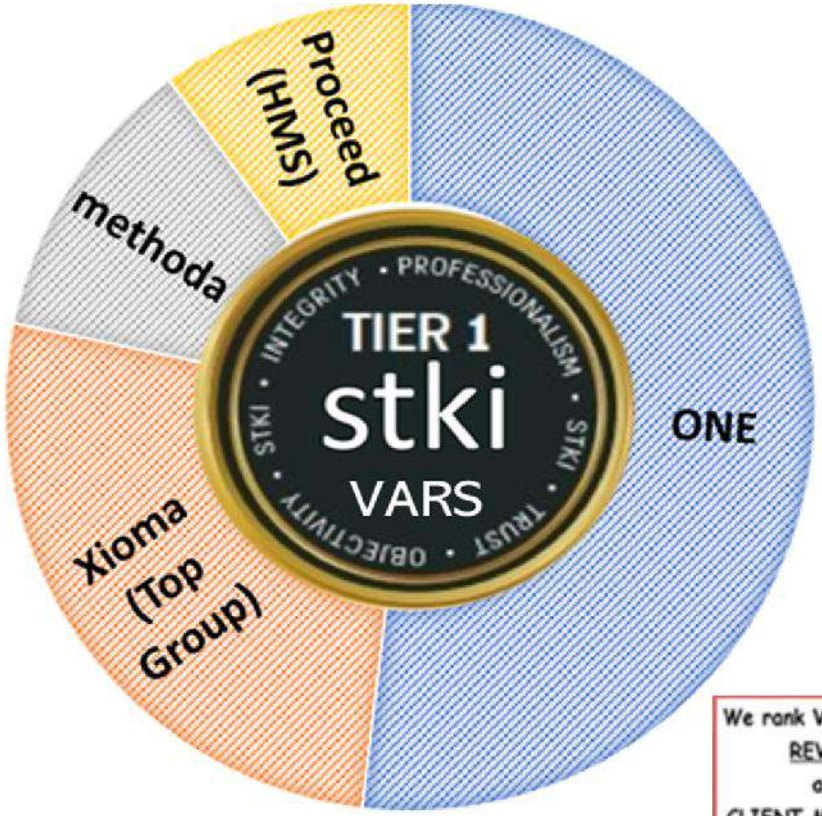
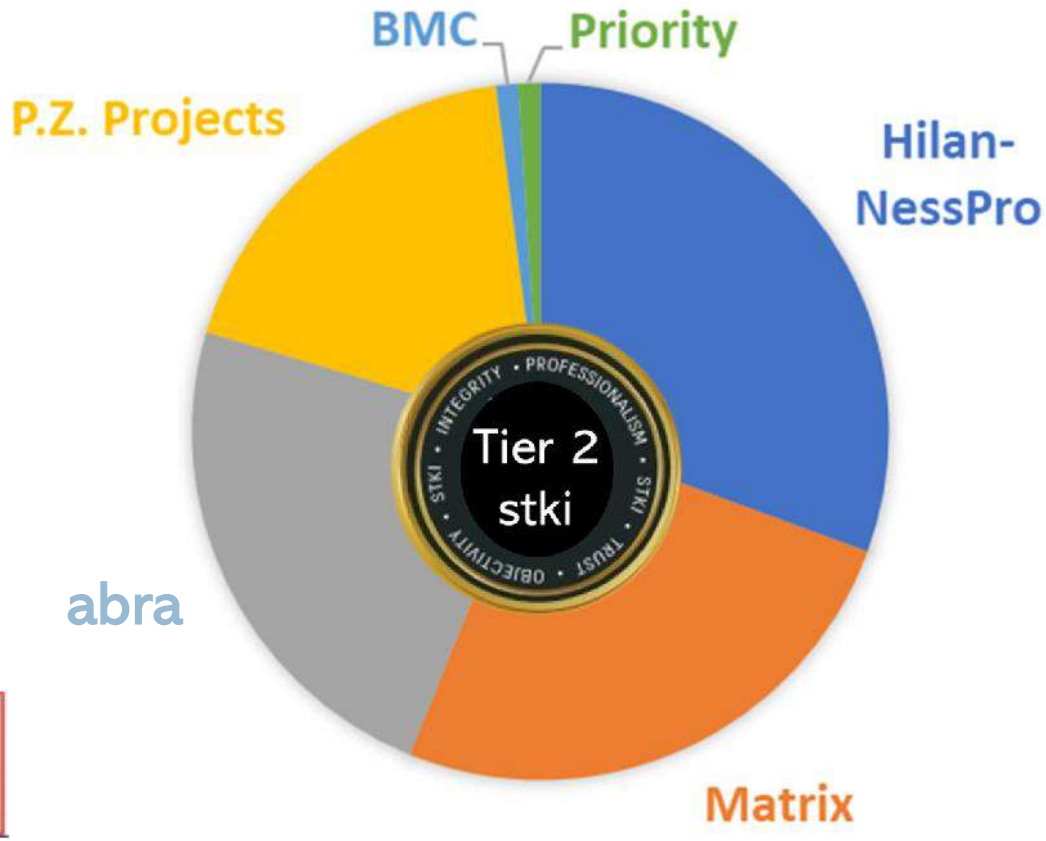
Project & Portfolio Management Tools (VARS) 146



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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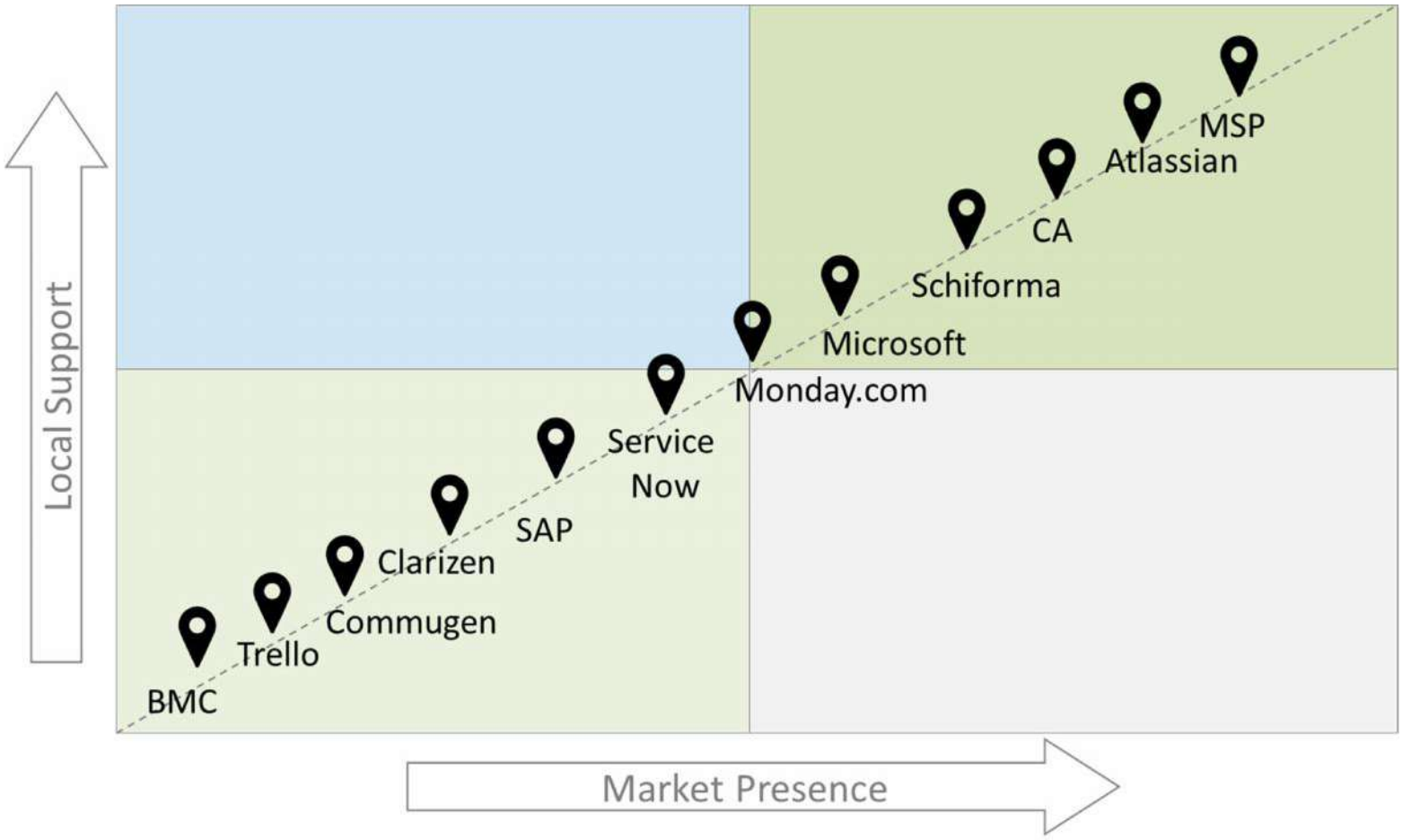
PPM (Project & Portfolio Management) 147



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PPM Tools & Integrators in Israel

148

	Rep in Israel	Integrators
Clarity PPM by Broadcom	Hilan - NessPro	Proceed
MySP	MySP	ONE1
Sciforma	Top Group, Xioma	Top Group
EPM by Microsoft	Microsoft	Matan, Abra, PZ Projects
Attlasian Jira	Methoda, Matrix, Practiproject, AgileSparks	Methoda, Matrix, Practiproject, Abra, Proceed

Global leader

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PPM Tools & Integrators in Israel

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	Integrators
ServiceNow Strategic Portfolio Management	Dicomano, Deloitte, Doitwise
SAP PPM	SAP, Proceed, Matan other potential SAP integrators
SAP by Design	Malan
Clarizen (Purchased by PlanView)	PZ Projects
Monday.com	TWODO ,ESL ,MATRIX, Entry point, Moveo
BMC	Matrix

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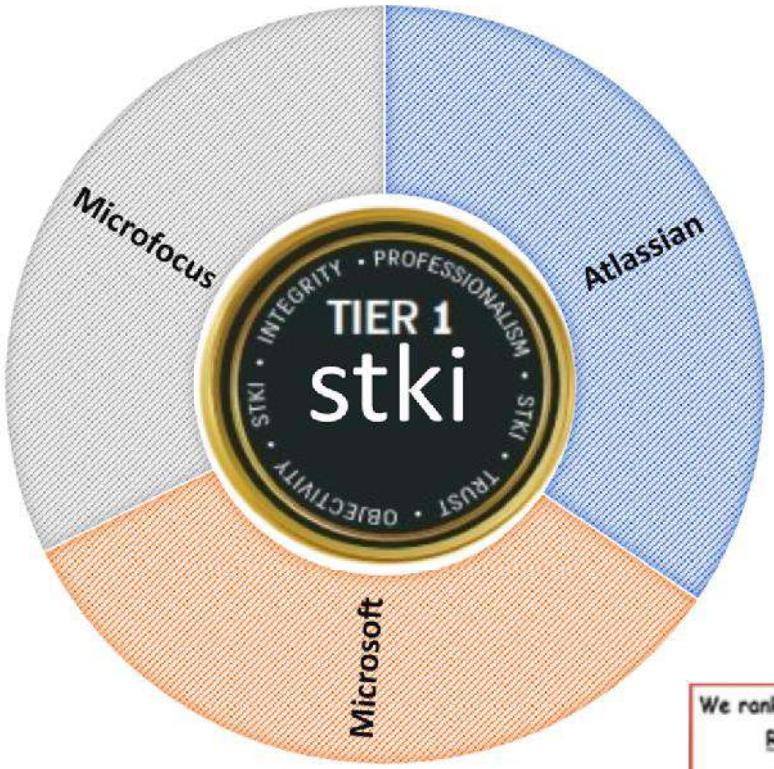
Development tools, ALM, Devops for all environments (including Mobile)

151



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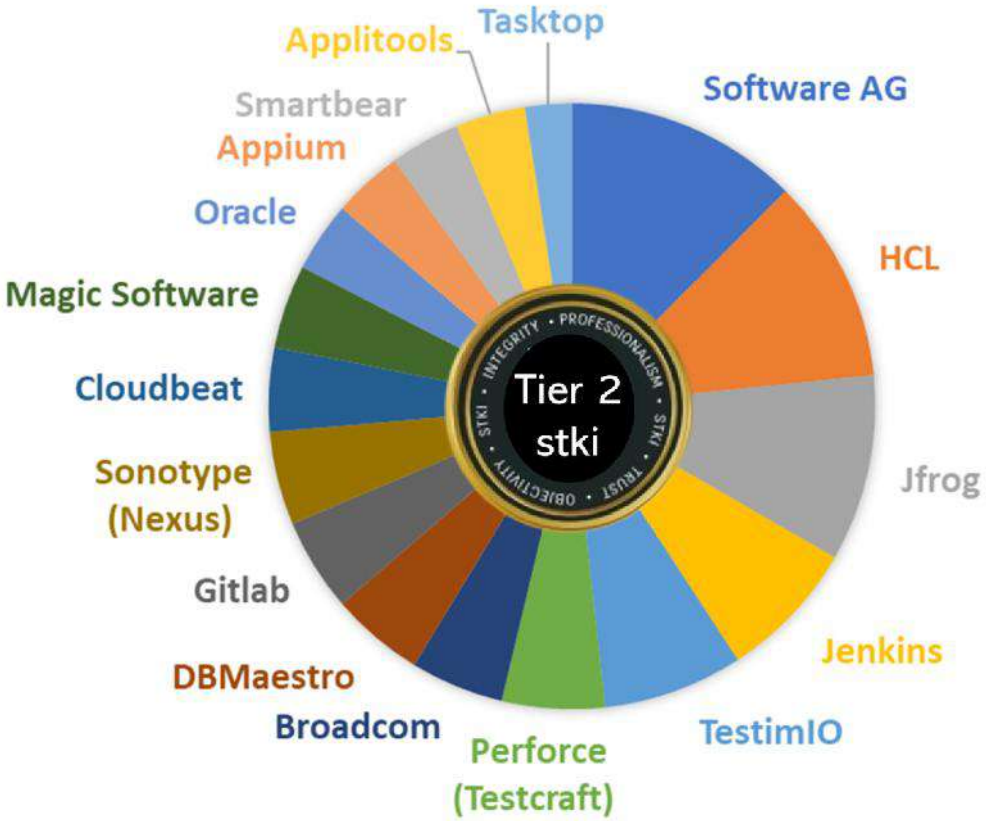

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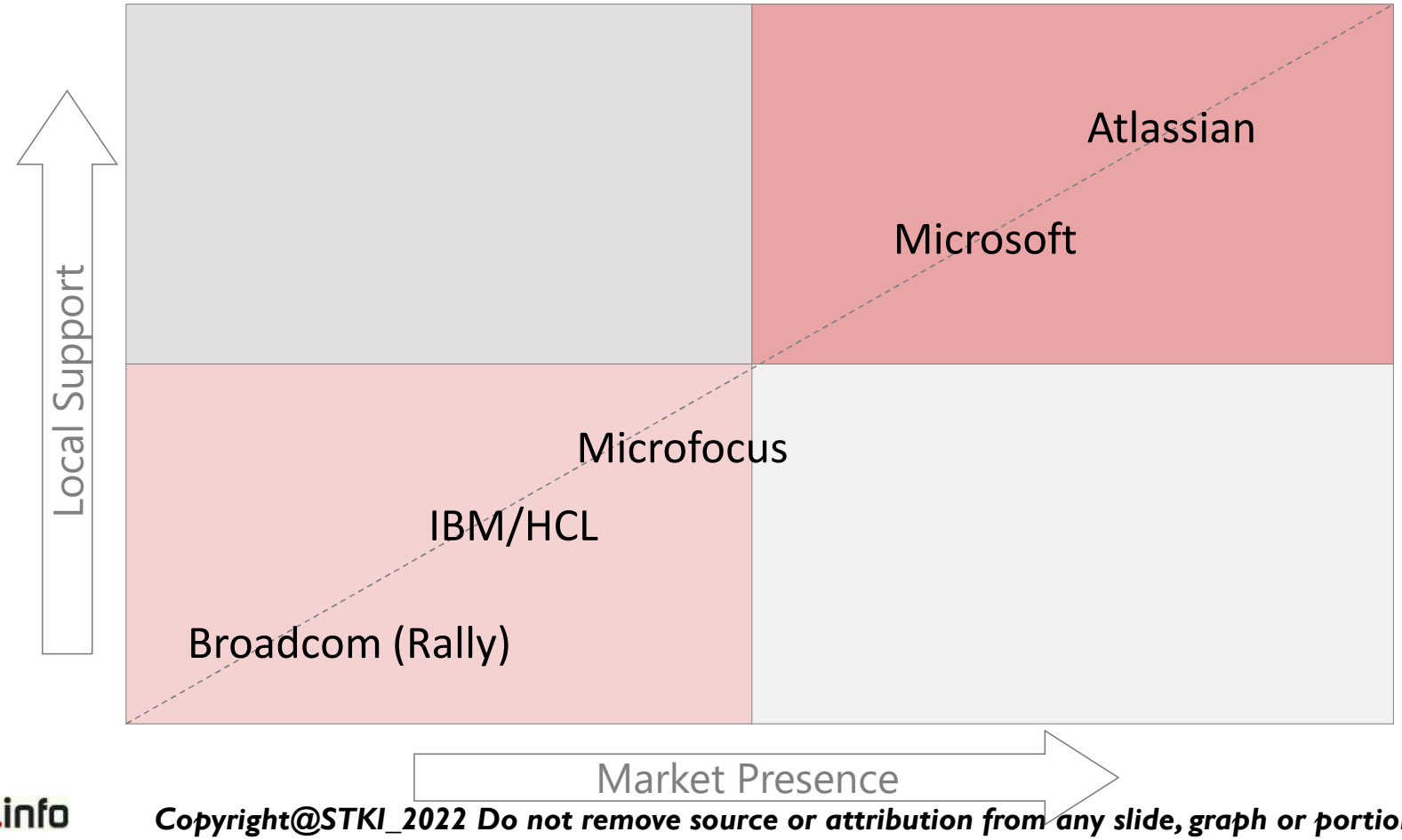
ALM (Application Lifecycle Management) 152



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ALM INTEGRATORS

Vendor	Product	Israeli Rep.	Integrators
Atlassian	Jira, Confluence, Bitbucket, etc.		Methoda, Matrix, practiproject , HMS. Agilesparks
Broadcom	Rally		NessPro
Microfocus	QC, Octaine, etc.	Microfocus Israel	matrix Qualitest vness
Gitlab	Gitlab		ALM Toolbox
sonatype			Matrix

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Low Code tools

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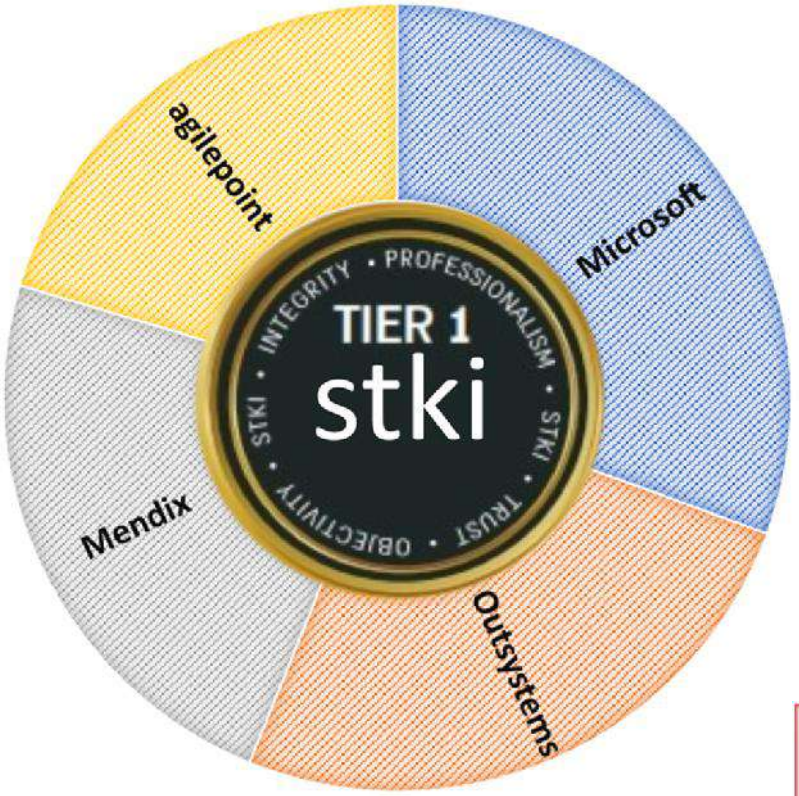

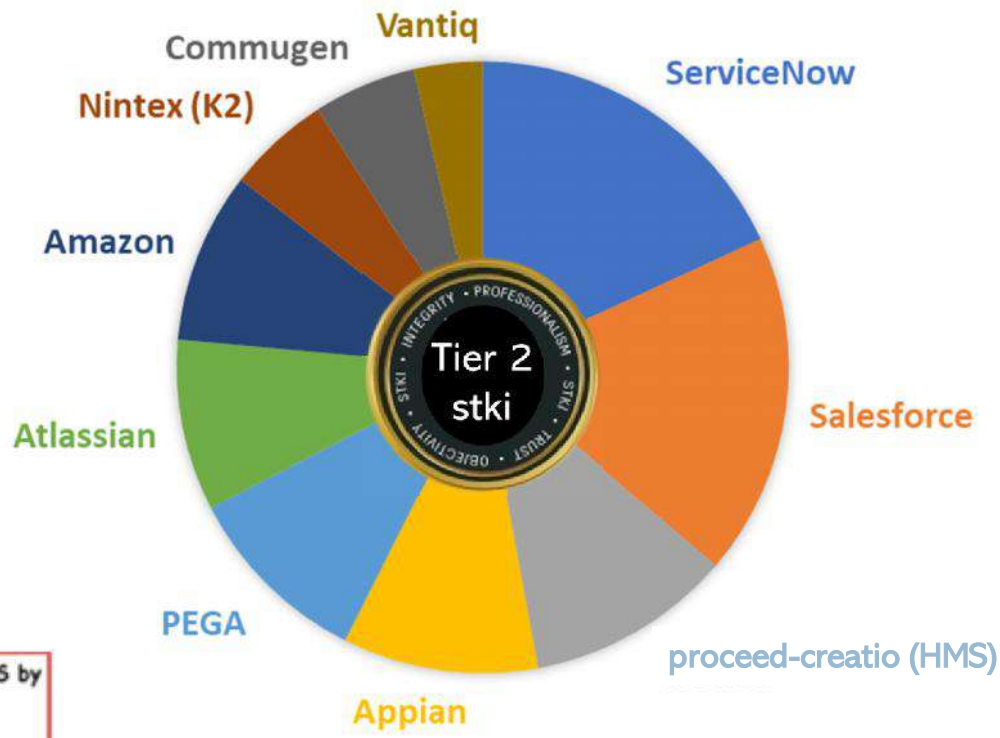

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EGRC MARKET 2018-2022

	2018		2019		2020		2021		2022
Governance, Risk & Compliance	$20.00	24.50%	$24.90	-19.68%	$20.00	-10.00%	$18.00	-5.56%	$17.00
TOTALS	$20.00	24.50%	$24.90	-19.68%	$20.00	-10.00%	$18.00	-5.56%	$17.00

Values in Million USD

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Governance, Risk & Compliance Tools

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We rank VENDORS by
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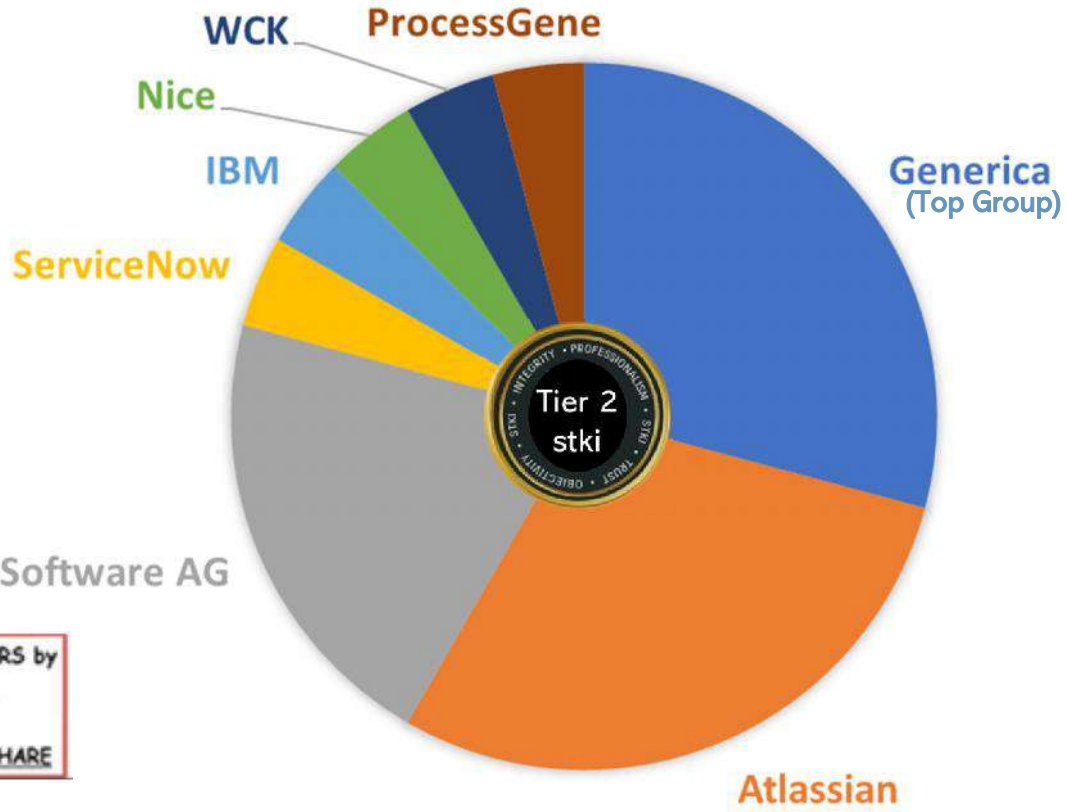

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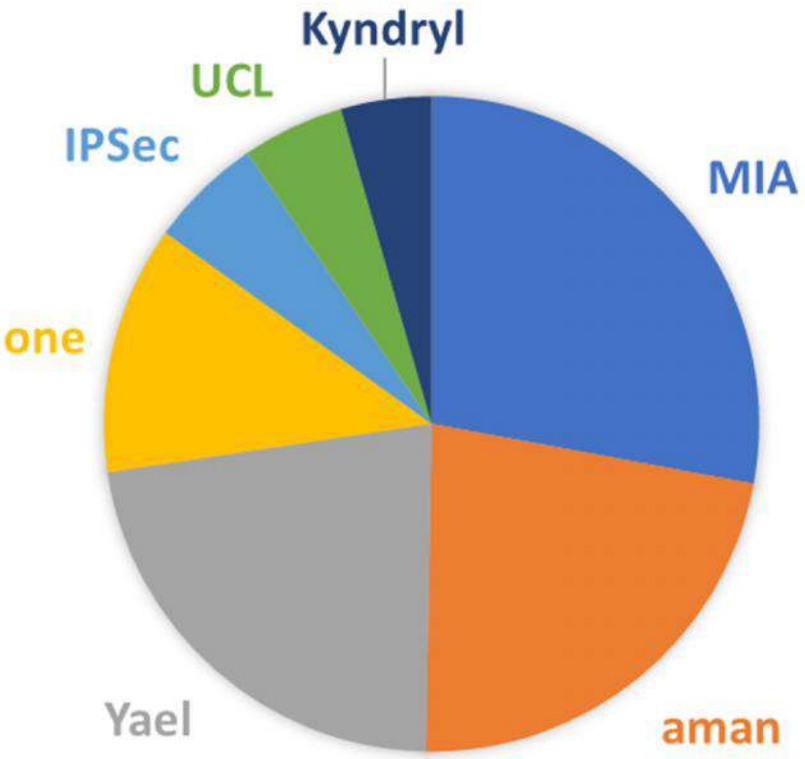
Governance, Risk & Compliance Tools (VARS) 157



We rank VENDORS by
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KNOWLEDGE & COLLABORATION TOOLS MARKET 2018-2022

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	2018		2019		2020		2021		2022
Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)	$175.00	-6.86%	$163.00	-3.07%	$158.00	-1.90%	$155.00	-9.68%	$140.00
Digital Output Management/Customer	$20.00	10.00%	$22.00	13.64%	$25.00	12.00%	$28.00	14.29%	$32.00
Employee Collaboration & Engagement Tools	$8.00	25.00%	$10.00	50.00%	$15.00	33.33%	$20.00	50.00%	$30.00
TOTALS	$203.00	-3.94%	$195.00	1.54%	$198.00	2.53%	$203.00	-0.49%	$202.00

Values in Million USD

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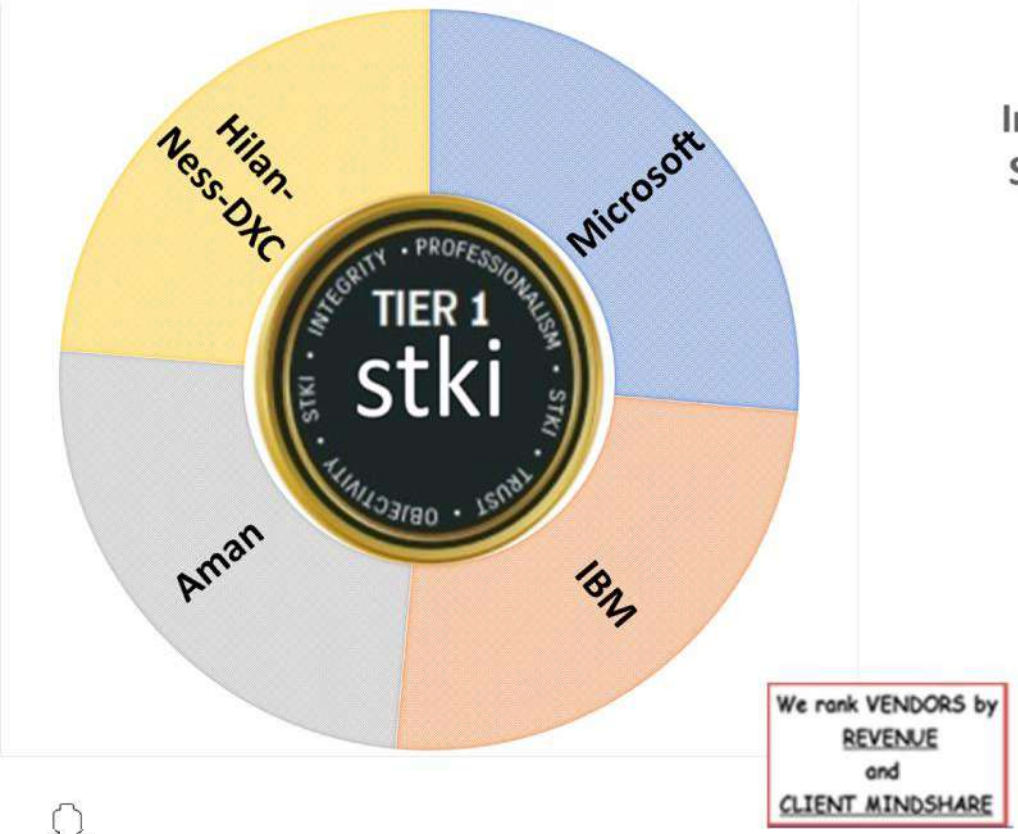
Employee Collaboration & Engagement Tools 159



We rank VENDORS by
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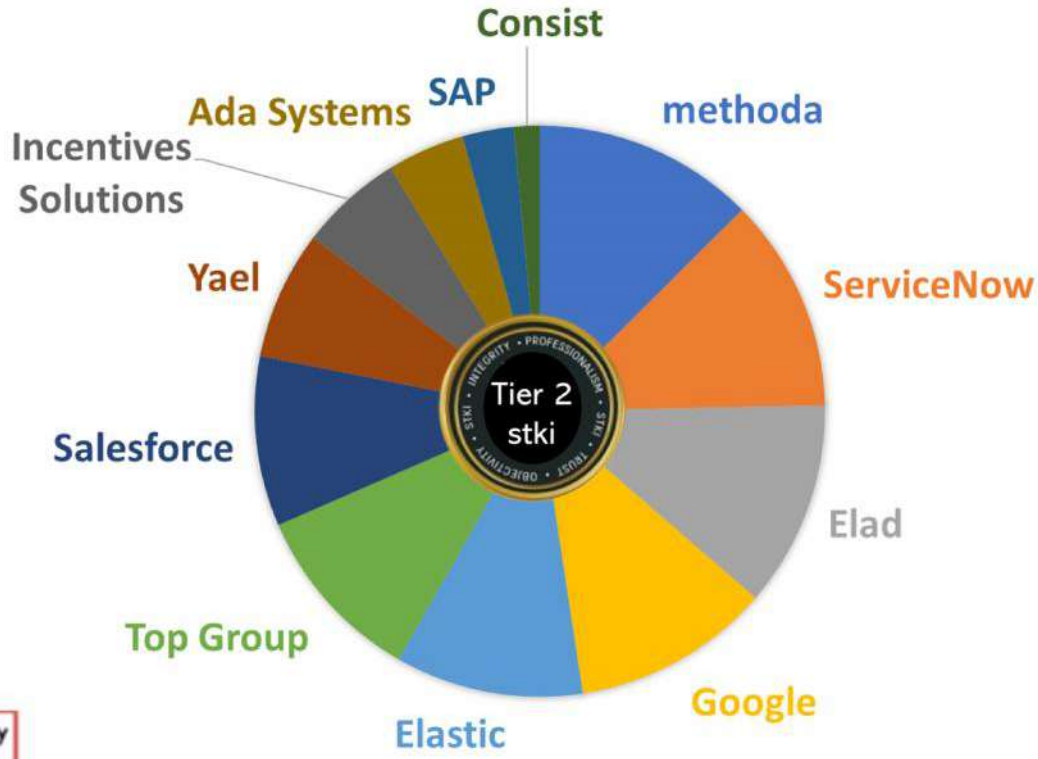

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KNOWLEDGE MANAGEMENT and EMPLOYEE COLLABORATION 160

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ANALYTICS & DATA MANAGEMENT TOOLS MARKET 2018-2022

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	2018		2019		2020		2021		2022
BI and Analytics Tools	$125.00	4.00%	$130.00	7.69%	$140.00	7.14%	$150.00	5.33%	$158.00
Data Mgmt. Tools (including data catalog, governance, ETL, quality)	$45.00	11.11%	$50.00	16.00%	$58.00	3.45%	$60.00	20.00%	$72.00
Data Science Tools	$10.00	20.00%	$12.00	50.00%	$18.00	11.11%	$20.00	30.00%	$26.00
AI/ML/DL Tools	$3.00	166.67%	$8.00	37.50%	$11.00	45.45%	$16.00	37.50%	$22.00
TOTALS	$183.00	9.29%	$200.00	13.50%	$227.00	8.37%	$246.00	13.01%	$278.00

Values in Million USD

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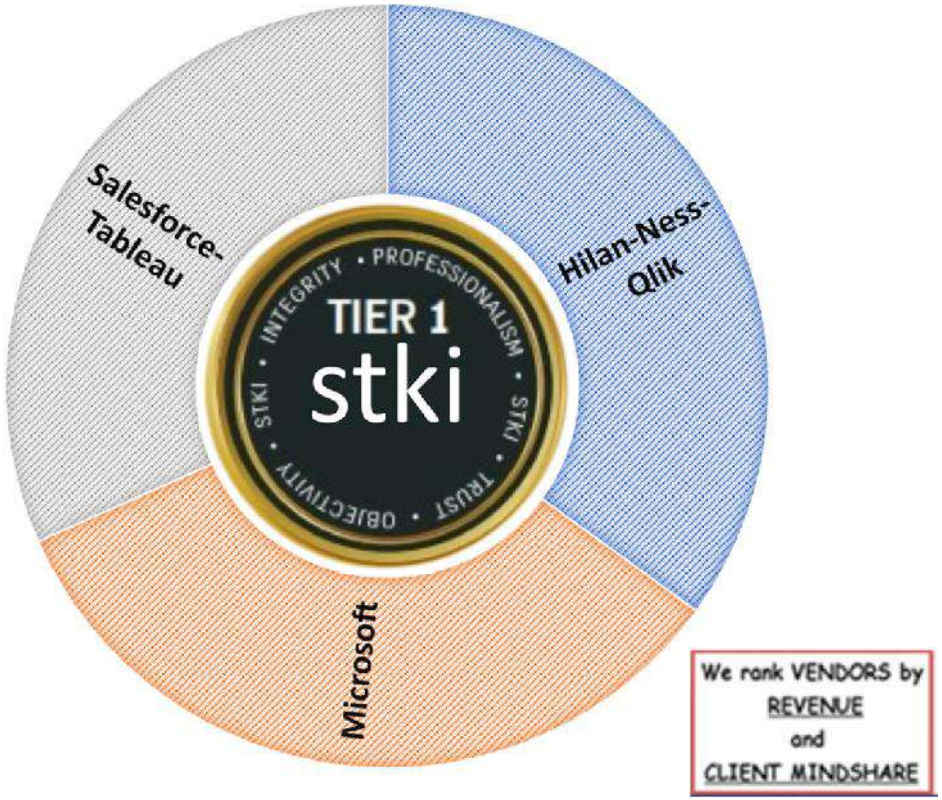
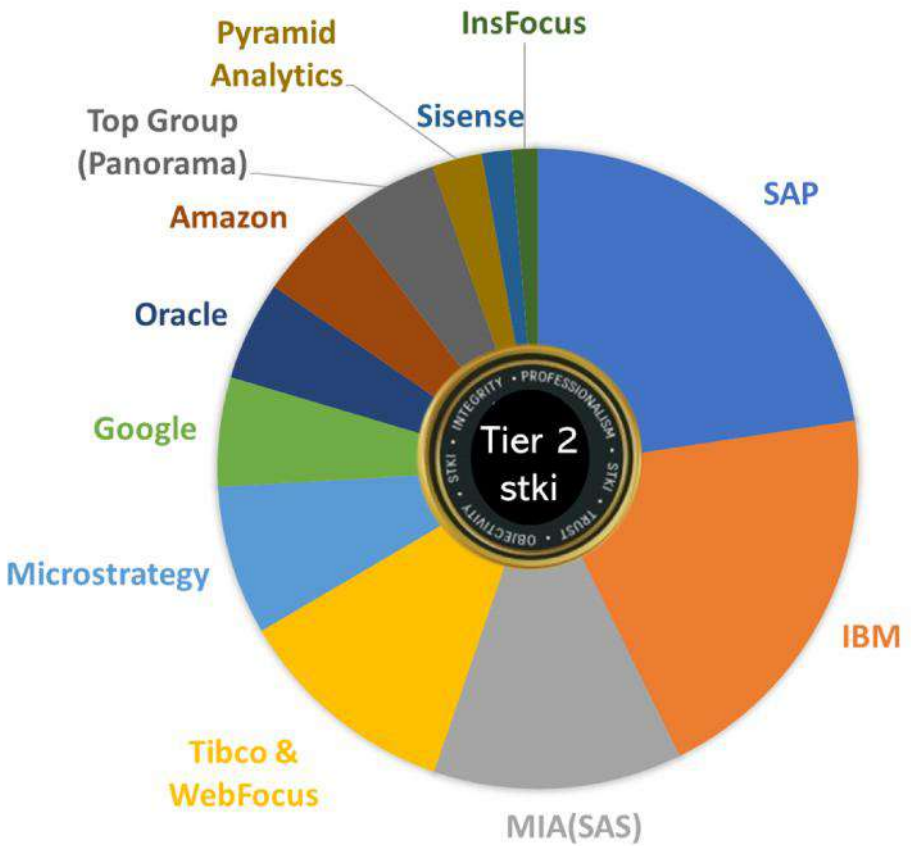
BI and Data Discovery Tools





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BI and Discovery Analysis

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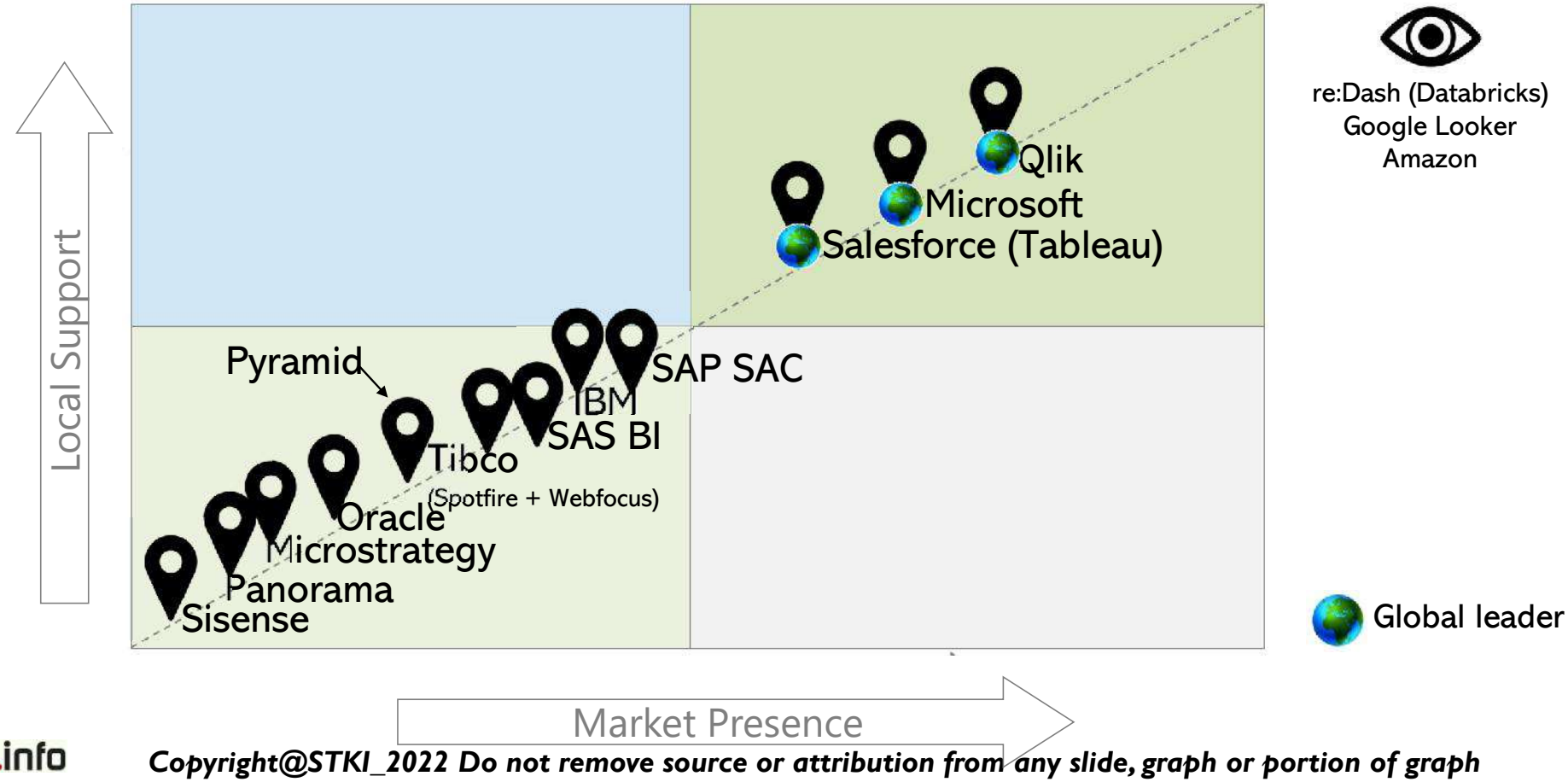

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BI GENERAL PLATFORMS - Part 1: 164

Package	Rep Israel	Integrators
SAP BO, SAP SAC	SAP Israel	SAC (SAP Analytics Cloud) and BO: One, Hilan-Ness-DXC, iProsis, Matrix DnA, Malam-Team, Skywind, BDO (BICS), Aman, SQLink, Nogamy, Abra – Oranbit (BO), Data Cube
Microsoft Power Platform Power BI	Microsoft Israel	Aman , SQLink, Hilan-Ness, One, MatrixDnA, Consist, Bynet SW, Elad Data, Malam-Team, Data Cube, Vision BI, MCS, SolidBI, Yael Group, Nogamy, Abra – Oranbit, PWC
Pyramid Analytics	Pyramid Israel	Nogamy, Normative, Aman, Data Cube, SolidBI, Hilan-Ness
IBM Cognos Analytics	IBM Israel	Yael Group, One (Libi), Seven-D, Consist, Aman, Normative, MatrixDnA, Malam-Team
Salesforce (Tableau)	Salesforce Israel SIT, VisionB, Naya, Gstat	SIT, Gstat, VisionBI, Naya, Yael Group, MatrixDnA, SQLink
Salesforce Einstein Analytics	Salesforce Israel	SIT

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BI GENERAL PLATFORMS - Part 2: 165

Package	Rep in Israel	Integrators
SAS BI + VA	Mia Computers (SAS)	Mia computers, Yael Group, Pareto, Nogamy
Microstrategy	Microstrategy Israel	Mittwoch, Comm-IT (Twingo), Matrix DnA, StrategyBI
Oracle Analytic Cloud	Oracle Israel	Oracle Consulting, Vision BI, BeWise, One, Abra – Oranbit (Visual Analyzer)
Tibco Jaspersoft Tibco Spotfire Web Focus (acquired by Tibco)	Yael Group (Tibco) Malam Team (Web Focus)	Yael Group, Malam Team (Web Focus)
Qlik	Hilan – Qlik Israel	One, Datamind, MatrixDnA, LogicalBI, Hilan-Ness, Hilan – Qlik, Aspect, Dtbit, Green House, Tirosh, Unitask (Emet), Anagal (Abra North), ExperisBI, Malam-Team, Edea
Panorama - Necto	Top Group (acquired Panorama)	Top Group
Sisense	Sisense	MatrixDnA
re:Dash (acquired by Databricks)	Databricks	
Looker (Google)	Google Israel	Vision BI, Twingo, Wideops

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Data Mgmt. Tools (including data catalog, governance, ETL, quality)

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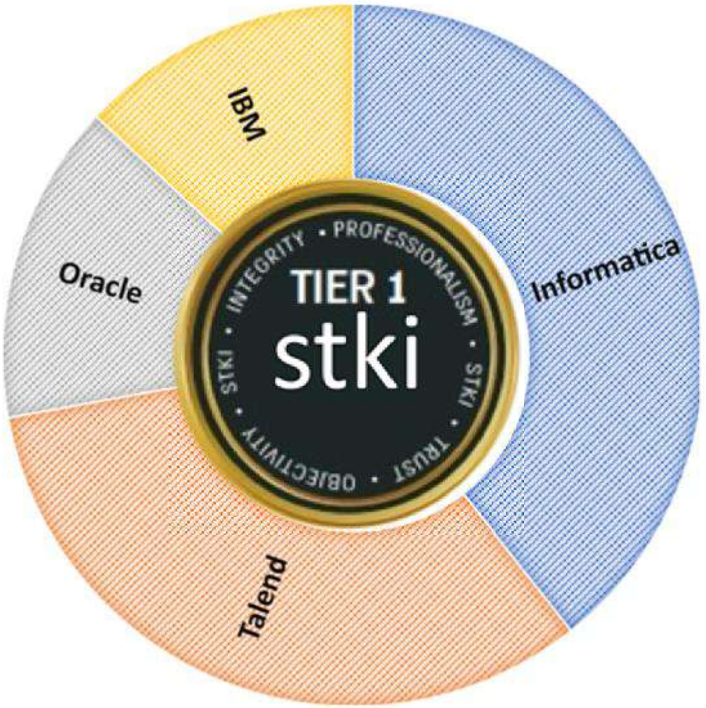

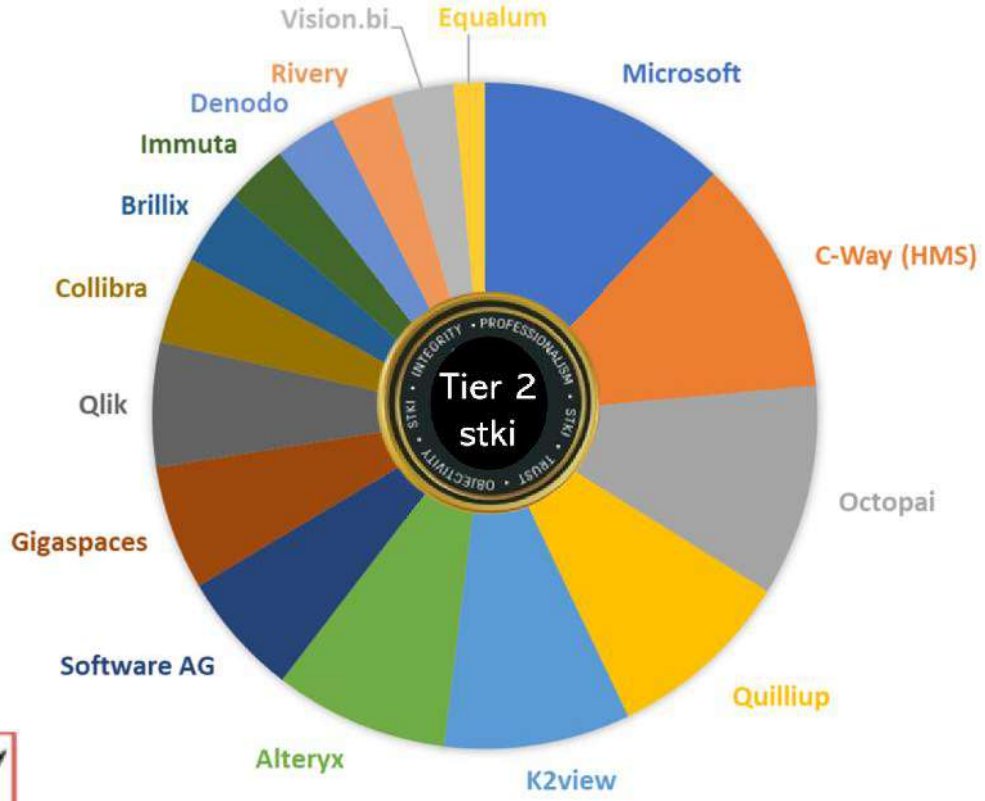

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VARS ALPHABETICAL ORDER
aman
elad
I.E.Mittwoch
Kyndryl
Malam-Team
Matrix
MatrixBI
Nogamy
one
TWINGO
UCL
Yael

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ETL (Extract Transform Load) Tools

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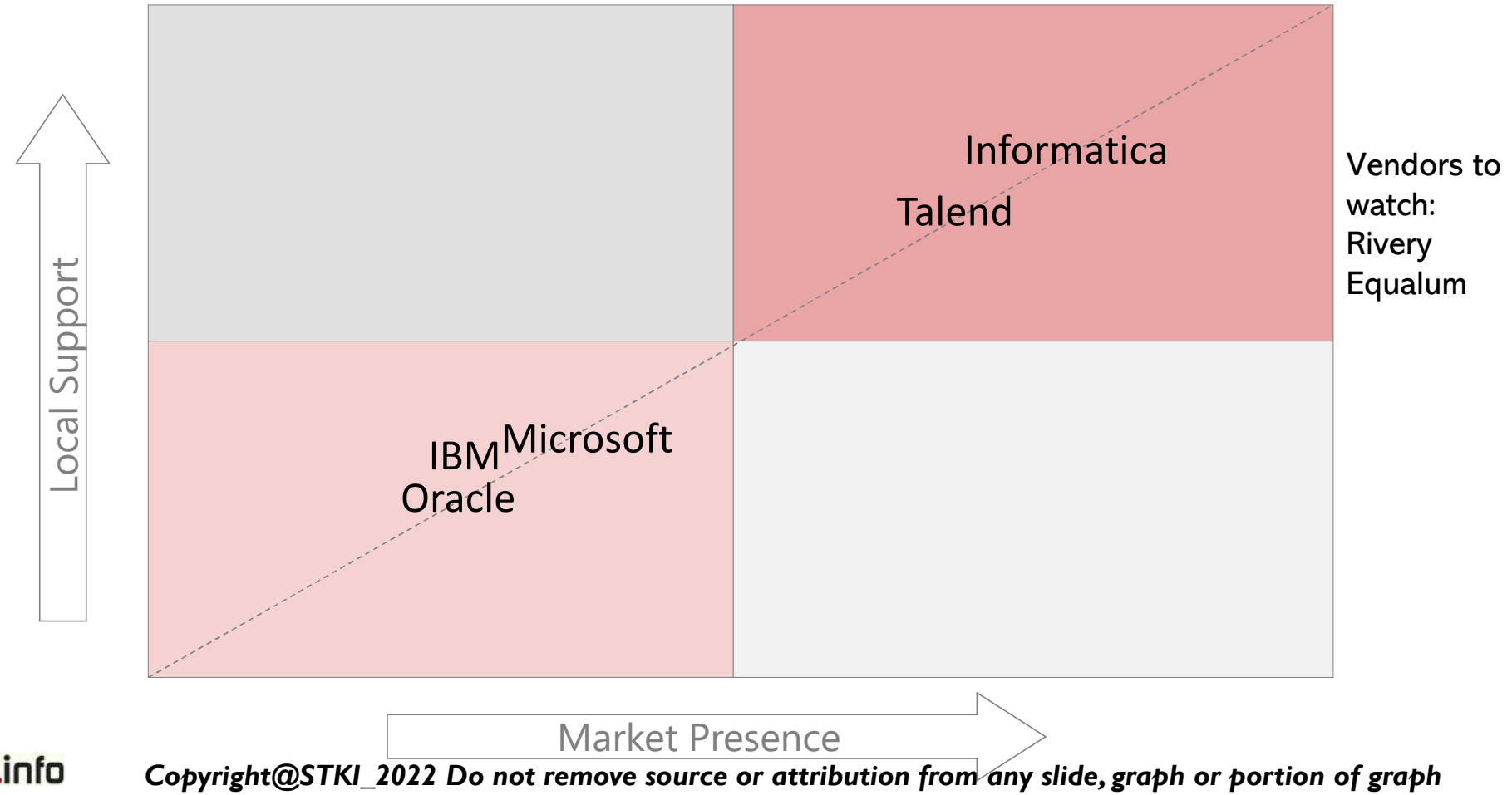

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ETL SELECTED INTEGRATORS

Vendor	Product	Israeli Rep.	Integrators
Informatica	Informatica	Informatica Israel	Aman Matrix
Talend	Talend Integration		UCL, Smartstreams
Rivery	Rivery ETL	Twingo	
IBM	Datastage	IBM Israel	Malam, IBM, and more

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DATA CATALOG, GOVERNANCE and PREPARATION TOOLS 169

Product	Description	Rep/Partners in Israel
Informatica EDC	Data Catalog, Data Governance	Informatica Israel, Aman Computers – Partner
IBM Data Governance WKC: Watson Knowledge Catalog	Data Catalog	Yael: Partners – Data Catalog
Talend Data Catalog	Data Catalog	UCL Group
Octapi	Metadata Management, Data Lineage	Aman Computers - Eternity
Collibra	Data Governance	Aqurate (UCL Group)
Salesforce - Tableau Prep	Data preparation	SIT
Alteryx (+ acquired Trifacta)	Data Preparation	UCL Group, One, SIT
Apache Atlas	Data Catalog and metadata	Matrix DnA
Immuta	Data Privacy	Matrix DnA
Alation	Data Catalog	Vision BI

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Data Science Tools

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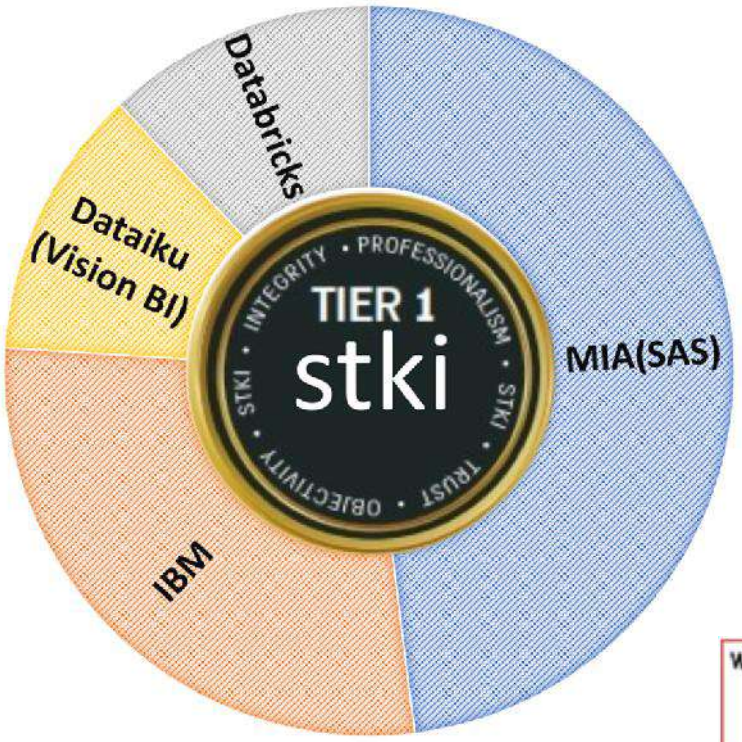

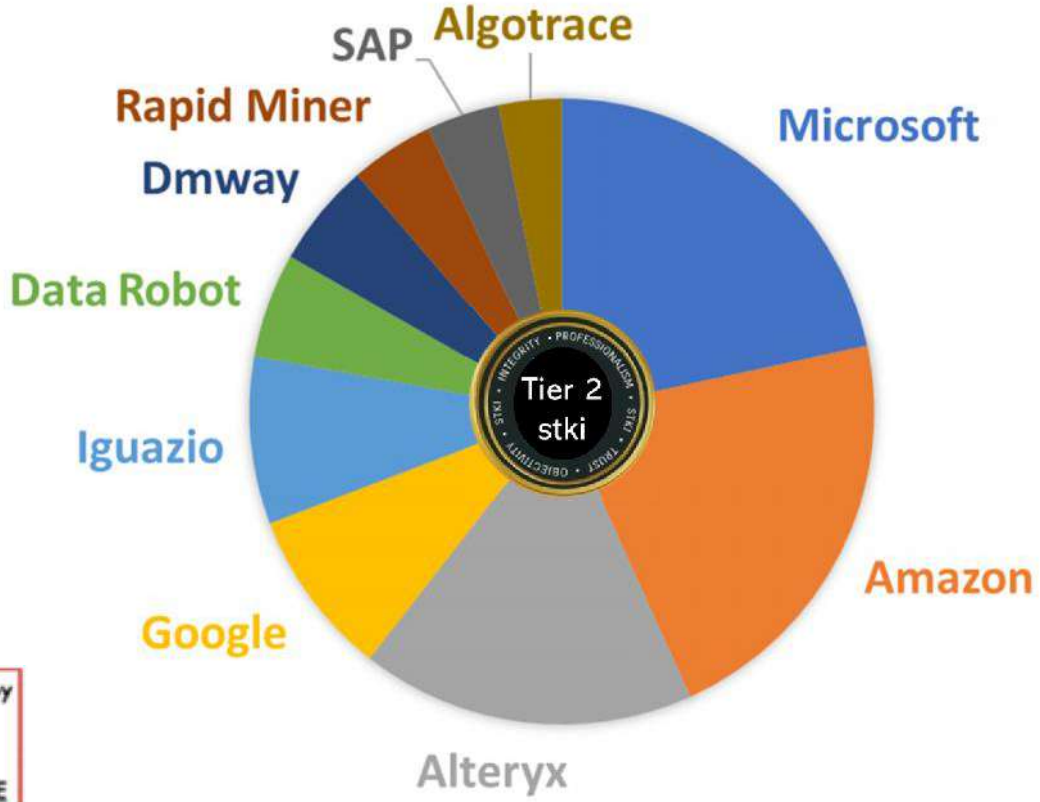

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Analytics & Data Science Platforms

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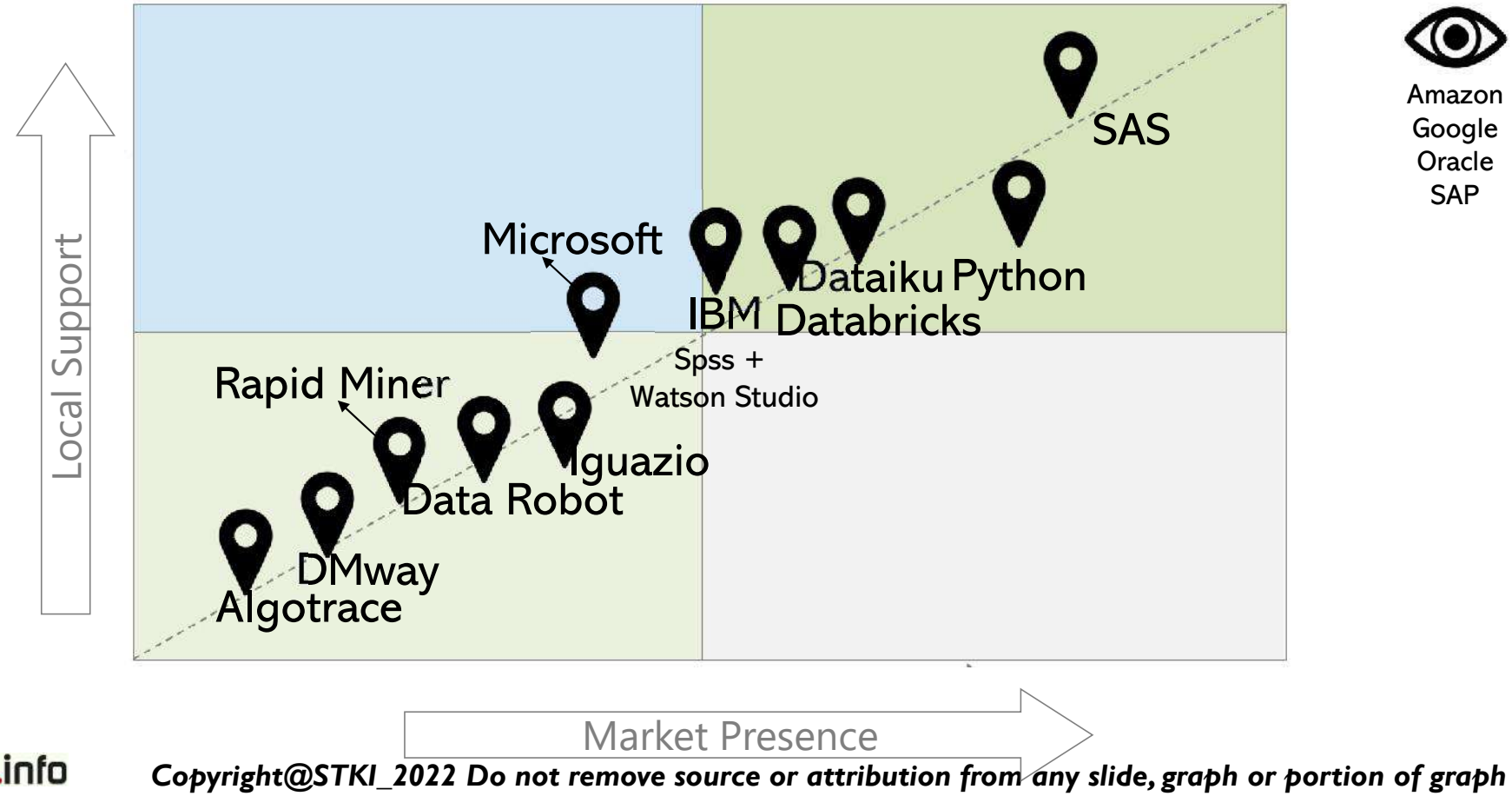

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DATA SCIENCE PLATFORMS – Part 1

Package	Rep in Israel	Integrators
SAS Viya, VS, text analytics SAS cloud: Results as a Service	Mia computers (SAS)	Yael Group, Finity (Risk, CECL), EY (Solvency), KPMG (Costing, AML), Appsgrade (Fin. Solutios), 7th Dimension (Risk and Finn. Solutions), Antropy (operational risk, compliance), EYC, HMS (CECL), Mia computers
IBM Analyze (SPSS), Cloud Pack for Data – Watson Studio, Open Scale, ML, Discovery (Text Analytics)	IBM Israel	Genius - SQlink, Emet, Webtech, KPMG, Deloitte, Yael - Realcommerce, Yael – IFN (IBM Content Analytics), One (Libi)
SAC: SAP Analytics Cloud	SAP Israel	One, Hilan-Ness-DXC, iProsis, Matrix DnA, Malam-Team, Skywind, BDO (BICS), Yael Group, Aman, SQLink, Nogamy, Data Cube
Microsoft Intelligent Cloud Azure AI, Synaps	Microsoft	One, SQLink - Opisoft, Aman, Elad Data, KPMG, Data Cube, GRTH, Yael Group, Intuit, Malam-Team, MatrixDnA, Gstat, EY, Sela, Madera, Naya
Dmway	Dmway	Dmway, Bynet SW
NBO	Gstat	Gstat
Qlik Big Squid (Auto ML)	Qlik Israel	- New-
Oracle Analytics Cloud	Oracle Israel	Oracle Consulting, One
Iguazio	Iguazio, Belocal	Belocal, DSG
DataBricks (on Azure, AWS, GCS)	DataBricks	Aman, Comm-IT Twingo, Sela, MatrixDnA, AllCloud (AWS)

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DATA SCIENCE PLATFORMS – Part 2:

Package	Rep in Israel	Integrators
Amazon ML Services – SageMaker	Amazon Israel	Amazon, MatrixDnA, All Cloud…
Google – Google Cloud Platform, Tensorflow, AutoML, BigQueryML	Google Israel	Yael Group, Razorlabs, Bynet Kaleidoo
Data Robot	Data Robot, Matrix	Matrix DnA, Emet
Tibco Spotfire (Statistica)	Yael Software	Yael Software
RapidMiner	Matrix	MatrixDnA, Taldor
R		Gstat, MatrixDnA, One, Genius (SQLink)
Knime	UCL Group	Taldor, Nogamy, UCL Group
Python		Taldor, MatrixDnA, One, KPMG, Delloite, Genius (SQLink), Hilan-Ness, many more…
H2O.ai		MatrixDnA
Accenture Applied Intelligence Platform + Insight Platform	Accenture Israel	Accenture Israel
Alteryx	SIT, One	SIT, One
Algotrace	acquired by Qualitest	
ClearML (MLOps)		Matrix DnA

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Data & Analytics in the Cloud: Platforms and Integrators 174

Package	Integrators
Microsoft Azure	Matrix DnA, Aman, Hilan-Ness, One, Nogamy, Malam-Team, Elad Data, Naya, KPMG
Amazon AWS	Matrix DnA, Aman, Hilan-Ness, One, Nogamy, Malam-Team, Elad Data, Yael Group, Naya, Twingo, KPMG
GCP: Google Cloud Platform	Bynet Kaleidoo, Matrix DnA and Cloudzone, Aman, DoIT, Yael Group. WideOps, Twingo, Sela, Razorlabs (ML), Naya Deloitte, KPMG, Accenture
Snowflake	Vision BI, Malam-Team, One, Yael Group
Oracle	Emet

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ENTERPRISE MANAGEMENT SYSTEMS MARKET 2018-2022

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	2018		2019		2020		2021		2022
ERP	$120.00	10.00%	$132.00	-28.03%	$95.00	26.32%	$120.00	8.33%	$130.00
vertical / core applications	$185.00	8.11%	$200.00	-25.00%	$150.00	0.00%	$150.00	13.33%	$170.00
CRM	$60.00	10.00%	$66.00	-6.06%	$62.00	20.97%	$75.00	6.67%	$80.00
HR/ Talent Mgmt./ LMS	$21.50	11.63%	$24.00	16.67%	$28.00	25.00%	$35.00	28.57%	$45.00
Marketing Automation Software	$3.00	133.33%	$7.00	42.86%	$10.00	50.00%	$15.00	33.33%	$20.00
TOTALS	$389.50	10.14%	$429.00	-19.58%	$345.00	14.49%	$395.00	12.66%	$445.00

Values in Million USD

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ERP PACKAGES

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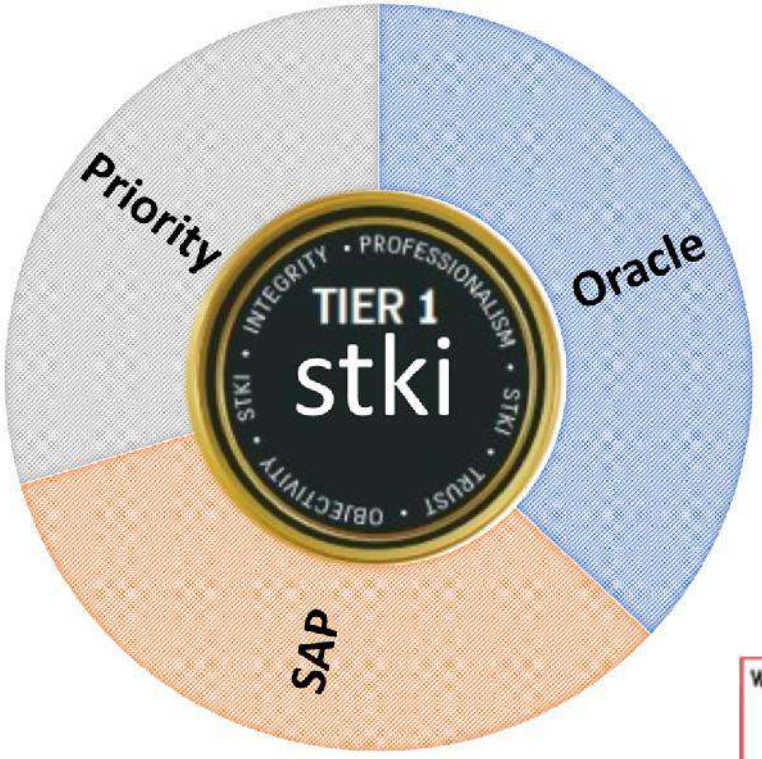

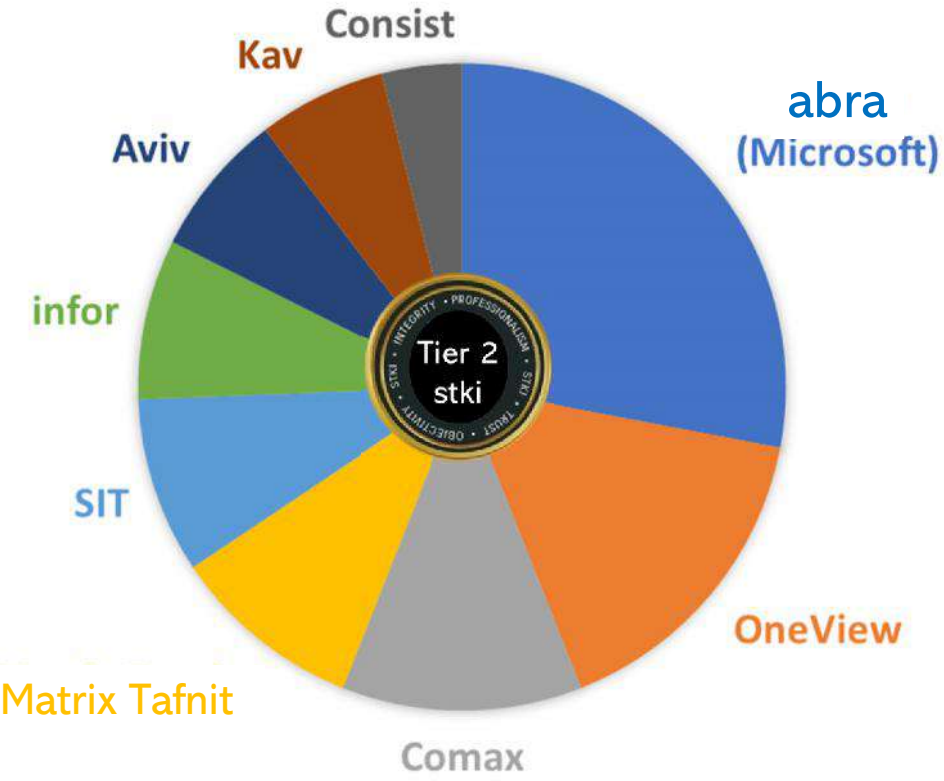

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Large-Scale ERP

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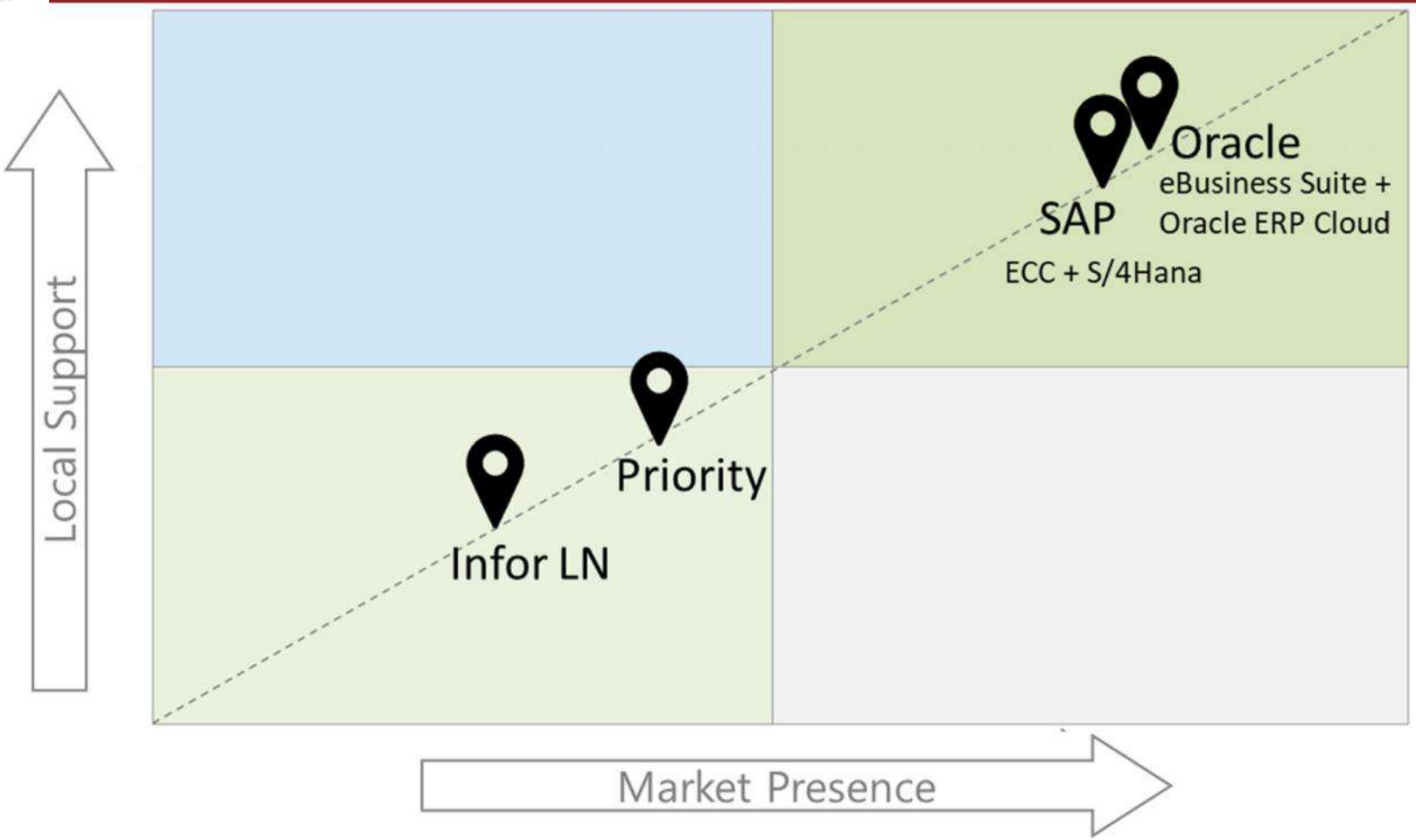

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SMB + Mid-market ERP PROJECTS (~10-300 users)

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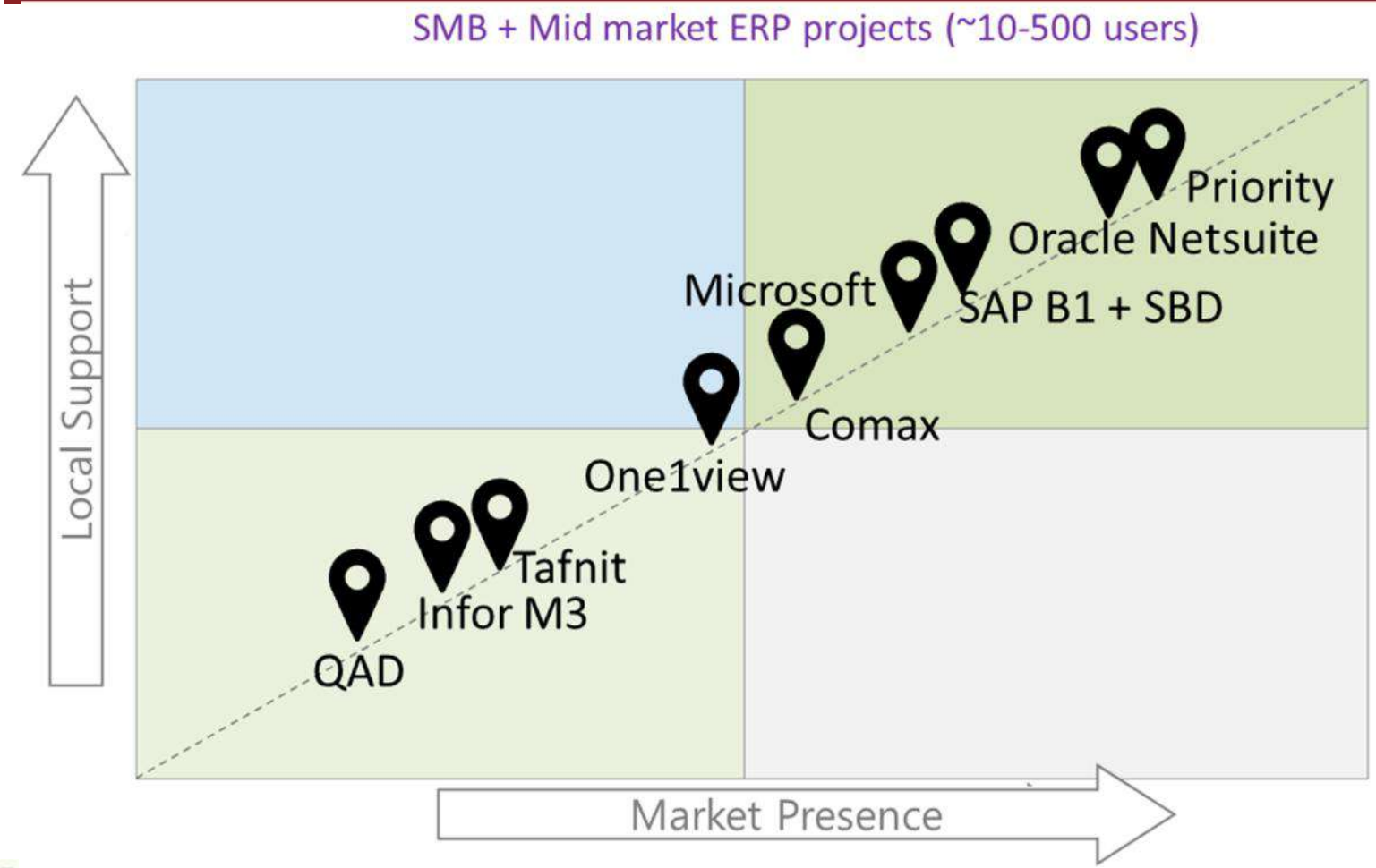

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ERP Integrators - Part 1

Package	Israel Rep	Integrators
Oracle ERP cloud Netsuite e-Business Suite	Oracle Israel	**Oracle ERP Cloud**: Oracle consulting, One1, Yael Group **Oracle Netsuite:** Netcloud, One1, iCloudius, AllCloud, Deloitte , Top Solutions, WinIT **Oracle eBusiness Suite:** Yael Group, DXC, PWC, TATA (TCS Israel), ONE1
SAP	SAP Israel	Hilan-Ness-DXC, IBM, ONE (Teldor+Xact + Advantech), Malam-Team, Deloitte, TATA (TCS Israel), Accenture, Convista Israel (SAP for Insurance), ValuePlus, Abra, Kyndryl
SAP Business One		Top Group (Ziv Systems + RELS), Complete, Menahel4U, BDO Ziv Haft, Xioma, Segment, UPTech
SAP by Design		Malam-Team (SeidorMalam), Alfacloud, Complete, ERP Logic
E-Tafnit, Tafnit 7	Matrix	Matrix, Alpha Consultants
QAD EE	SIT	SIT, ManofIT, Tirosh
Priority	Priority	Matrix - Medatech, One1 - FBC, Agrosoft, EDP, eBase, Prioricity, EliteERP, Infobase, Gap, Tirosh, Eshkol, IT Backoffice, Pitronim, SIBUD, Login, Tadiad, Epilog, ERP Guru, Dsi, T.G.Net, Open Mind, Yael Group (Tulip), Kama
Infor (M3)	Intentia Israel	Intentia Israel
ONE1ERP	ONE1	ONE1 + Freelancers

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ERP Integrators – Part 2

Package	Israel Rep	Integrators
Microsoft Dynamics AX	Microsoft Israel. Distribution by abra - Prodware	abra – (Prodware), Oregano, MCS, Biz Aid
Microsoft Dynamics NAV		abra – (Prodware, Anagal), Dover Applications
FinPro, Logistic Pro	Almog	Almog
KAV systems	Kav	Kav, Ardom
Aviv, MARS	Aviv	Aviv
Gan Tochnot Heshev (Kibbutzim) **Azimut (Car)** **ERP Plus (cross-sector)**	Aman	Aman
Comax	Comax	Comax
LN Infor	Matrix	Matrix
ERP Focus (for global shipping)	Malam-Team	Malam-Team
Odoo	Layline Tech	Layline Tech

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CRM APPLICATIONS

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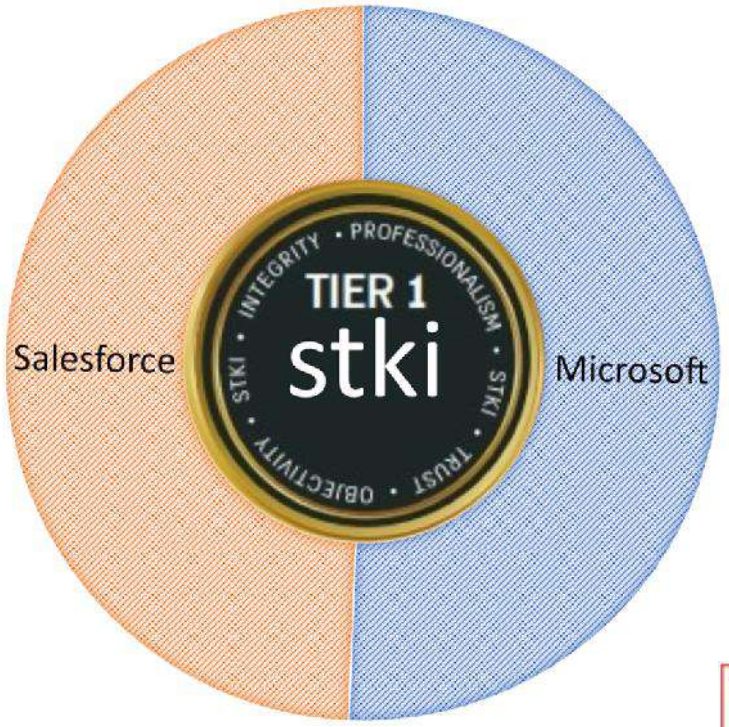

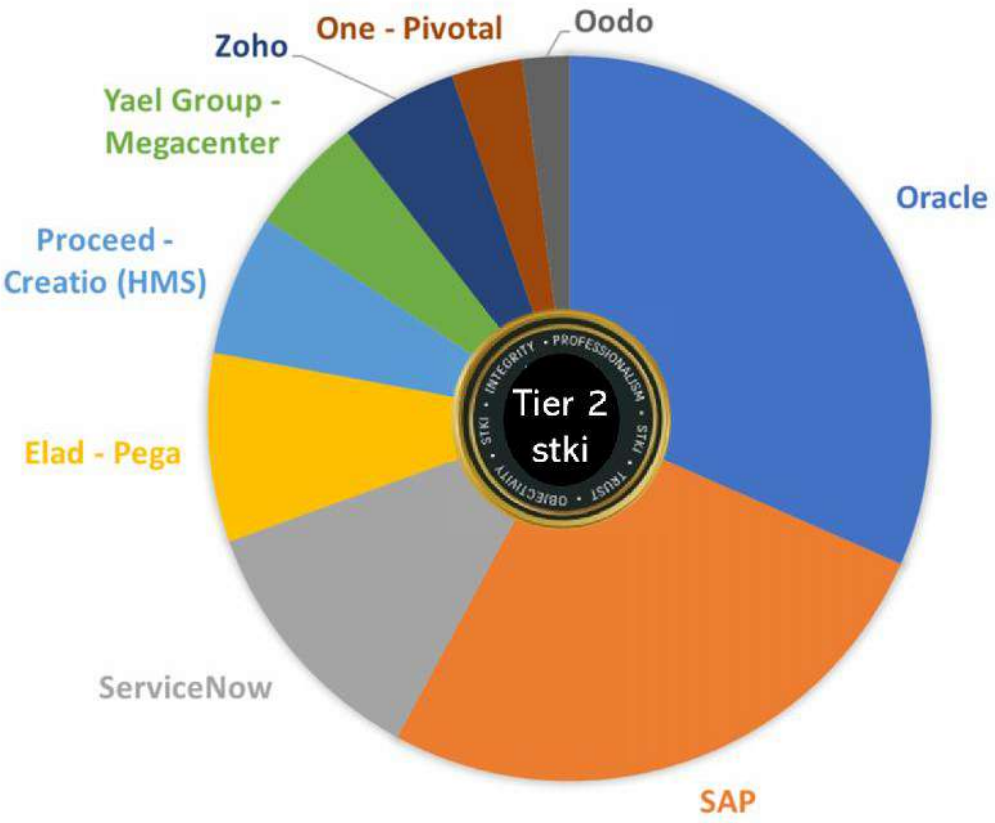

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CRM Platforms

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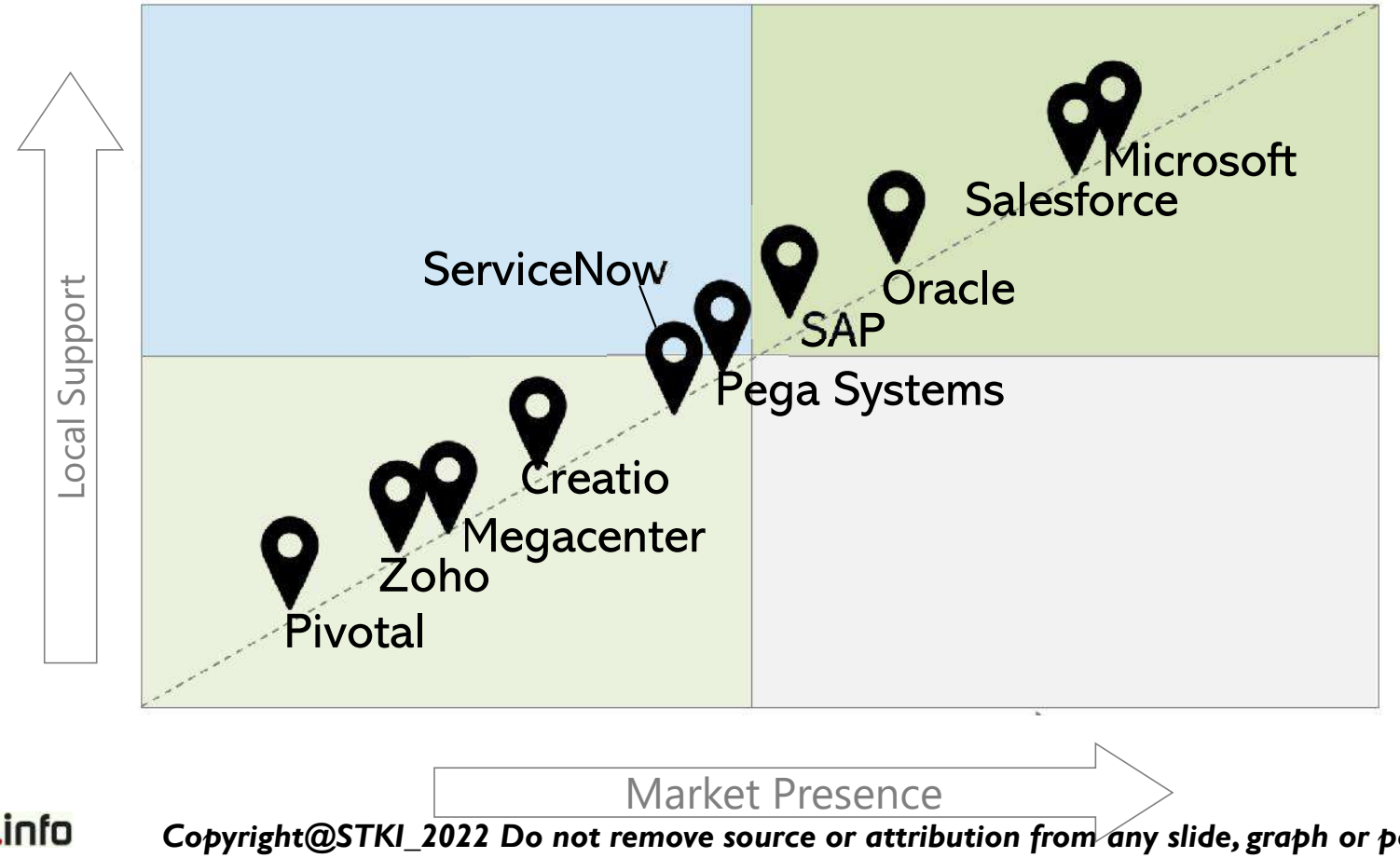

Odoo
Freshworks
Oro CRM
Zoho

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CRM Platforms in Israel - Part 1

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Package	Israel rep.	Integrators
Oracle Engagement Cloud	Oracle Israel	Oracle Consulting, One, Accenture, Yael Group
Oracle Service Cloud (RightNow)		Oracle Consulting, One, One Prime (Field Service)
Oracle Sales Cloud		Oracle Consulting
Oracle – Siebel		One - Taldor, Matrix, We-Do (Emet), Yael Group, Oracle Consulting
Oracle - Peoplesoft		Matrix, Evo-IT
Oracle Netsuite CRM		Yael Group (NetCloud), One
Salesforce	Salesforce Israel	AllCloud, One BA Link, We-do (Unitask - Emet), Delloite, Elad (Servicewise), Yael (Cloudtech), iCloudius, Accenture,, PWC, Malam-Team, Matrix, Abra, Aman-Asperi
Microsoft Dynamics 365	Microsoft Israel	Elad, Matrix, Malam-Team, Hilan-Ness-DXC, Aman, Abra, PWC…

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CRM Platforms in Israel - Part 2

Package	Israeli Rep.	Integrators
SAP CM (Customer Mng) S4	SAP Israel	Abra, Malam-Team, AKT, One
SAP Service and Sales Cloud (aka C4C)		Abra, Top - Xioma ,Menahel4U, AKT, One
MEGA Center	Yael Group	Yael Group
ServiceNow CSM	ServiceNow	One (Dicomano) Ness TSG, Hilan-DXC, Bizflow, Bynet
Pivotal	One	One
Odoo	Lalynetech	Lalynetech
Freshworks	Malam-Team	Malam-Team
Oro	Abra	Abra
Zoho	Tamayo, Holistic CRM	Tamayo, Holistic CRM
Pega	Elad	Elad
Creatio	Proceed (HMS)	Proceed (HMS), Shita
Hubspot CRM		

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HR/ Talent Mgmt./ LMS APPLICATIONS

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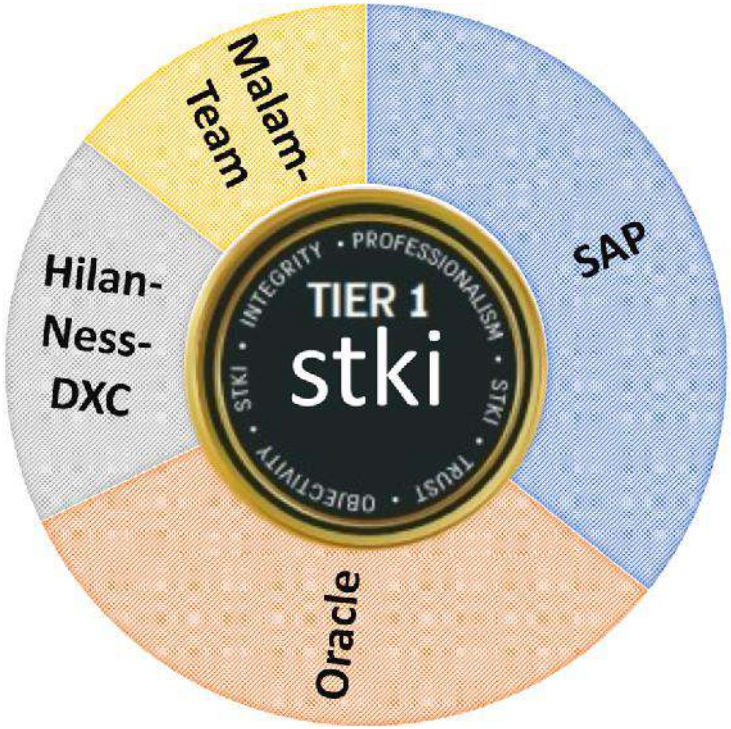

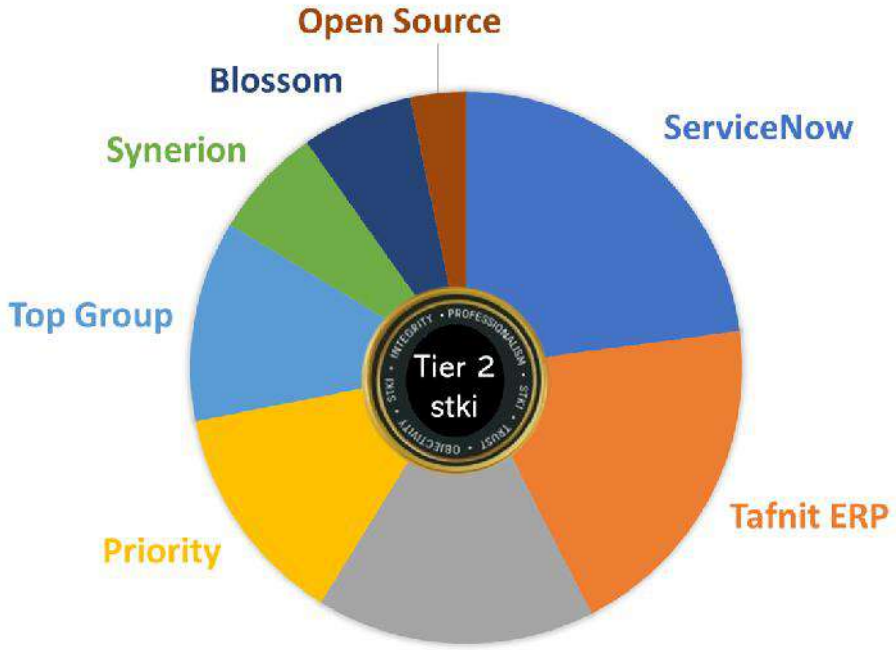

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HCM, Payroll & Talent Management Suites

Package	Category	Rep. in Israel	Integration partners
Oracle, HCM	Core HR, Payroll, Talent Mng.	Oracle Israel	Unitask, Oracle, Malam-Team
SAP HR, SAP Successfactors, Nakissa, Workforce Analytics, WPB, Litmos, SAP Experience Management (XM)	Core HR, Payroll, Talent Mng, Org. Chart	SAP Israel	AKT, One1 (Xact), IBM, Synerion, Deloitte
Hilan	Core HR, Payroll, Talent Mng.	Hilan	
Malam Payroll	Core HR, Payroll, Talent Mng.	Malam-Team	
Cornerstone	Talent Management	Matrix	Matrix
Synerion	Time and attendance, core HR, Talent Mng.	Synerion	Synerion
Workforce Software	Time and Attendance, Workforce Mng.	AKT	AKT
Dynamics 365	Talent Suite	Microsoft, Prodware	Prodware

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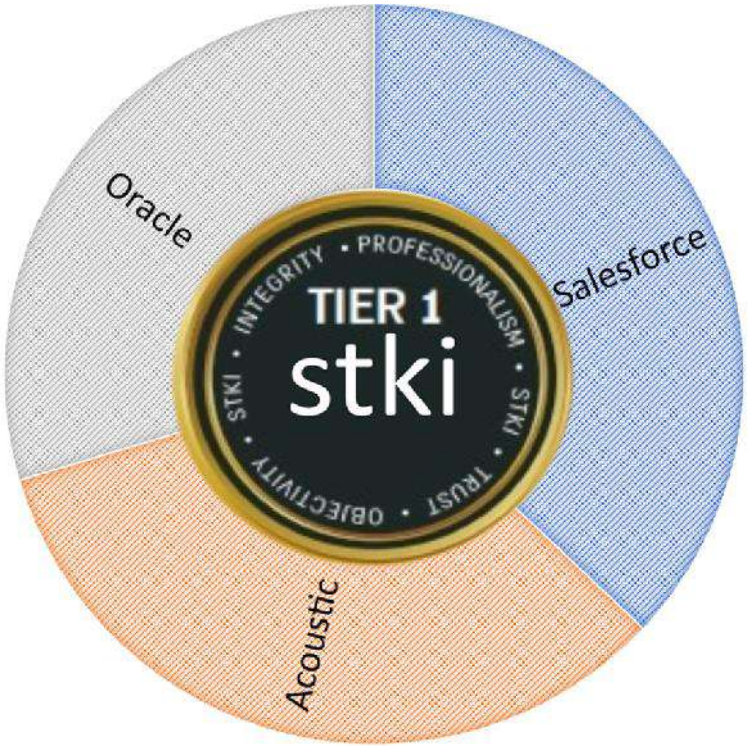
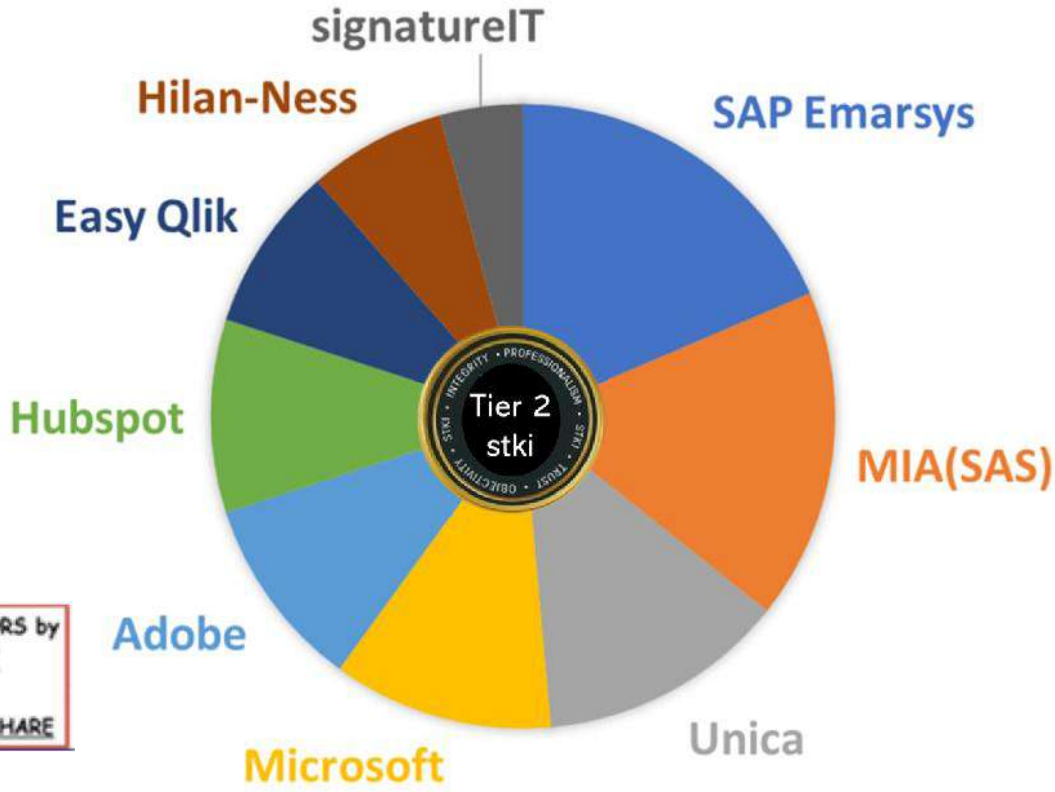
MARKETING AUTOMATION SOFTWARE 187





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MARKETING AUTOMATION SUITES 188

Vendors to Watch:
Next Topic
Synerise

Global leader

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MARKETING AUTOMATION SUITES – Part 1

Package	Israel rep.	Integrators
Oracle	Oracle Israel	Oracle Consulting **Agencies**: Publicis, Mccan MRM (+ Hike), HippoCampus…
Salesforce Marketing Cloud	Salesforce Israel	Elad (Servicewise), We Kunnen (Weku), Data-Pro, Deloitte, Yael Group (CloudTech & Actiview), Baybridge Digital
Acoustic	Be2See (Emet)	Emet-Be2see (EMET Group)
Adobe (+Marketo)	Deloitte Digital	Deloitte Digital – Adobe, Marketo - Agencies
HCL – Unica Journey	Be2See (Emet)	Be2See (Emet), Gstat (Unica), Yael Group (Unica)
SAS CI 360	Mia computers (SAS)	Yael Group (Actiview)
Microsoft MA	Microsoft Israel	Abra, Matrix DnA, Malam-Team, Elad

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MARKETING AUTOMATION SUITES – Part 2 190

Package	Rep. in Israel	Integrators
SAP Emarsys Engagement Platform SAP Marketing Cloud	SAP Israel	**Emarsys**: SAP Israel, Be2See (Emet), AKT, One-Saban **Marketing Cloud**: Abra, NGSoft, Matrix, STUNIS ,iProsis, Ideo Digital
Hubspot		Yael Group (CloudTech)
Pega Marketing Automation	Elad	Elad
Synerise	CodeOasis	CodeOasis
SalesManago	SignatureIT	SignatureIT
Next Topic	Hilan-Ness-Pro	Hilan-Ness-Pro
Zoho Marketing Automation	Tamayo, Holistic CRM	Tamayo, Holistic CRM

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LOYALTY SOLUTIONS 191

NEW

Package	Israeli Rep.	Integrators
Oracle - CrowdTwist	Oracle Israel	Oracle
SAP Emarsys	SAP Israel	SAP
Salesforce Loyalty Management	Salesforce Israel	Salesforce

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BUSINESS APPLICATION SYSTEMS MARKET 2018-2022

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	2018		2019		2020		2021		2022
Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc.…)	$29.00	17.24%	$34.00	47.06%	$50.00	16.00%	$58.00	12.07%	$65.00
E-Commerce Platforms	$1.00	150.00%	$2.50	300.00%	$10.00	50.00%	$15.00	33.33%	$20.00
Web Content Management Platforms	$10.00	85.00%	$18.50	8.11%	$20.00	7.50%	$21.50	6.98%	$23.00
Marketplace Platforms	$0.00	#DIV/0!	$0.00	#DIV/0!	$5.00	100.00%	$10.00	80.00%	$18.00
PLM Systems	$5.00	30.00%	$6.50	-23.08%	$5.00	20.00%	$6.00	33.33%	$8.00
Blockchain platforms	$0.00		$2.00	50.00%	$3.00	33.33%	$4.00	50.00%	$6.00
RPA Platforms	$4.00	75.00%	$7.00	185.71%	$20.00	25.00%	$25.00	40.00%	$35.00
IOT tools and platforms	$1.50	133.33%	$3.50	42.86%	$5.00	20.00%	$6.00	66.67%	$10.00
TOTALS	$50.50	46.53%	$74.00	59.46%	$118.00	23.31%	$145.50	27.15%	$185.00

Values in Million USD

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Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc.…)

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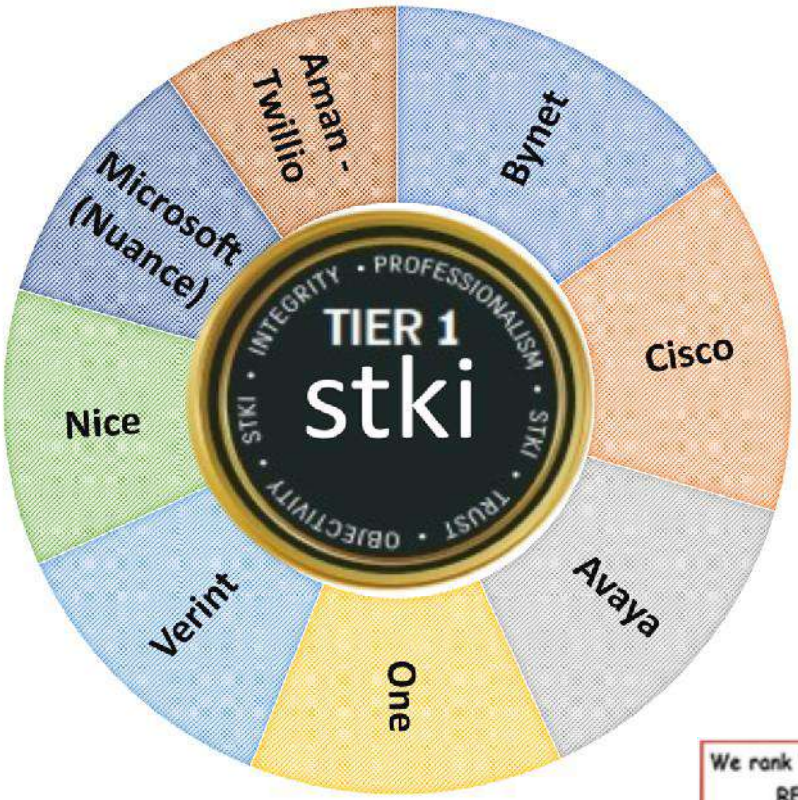

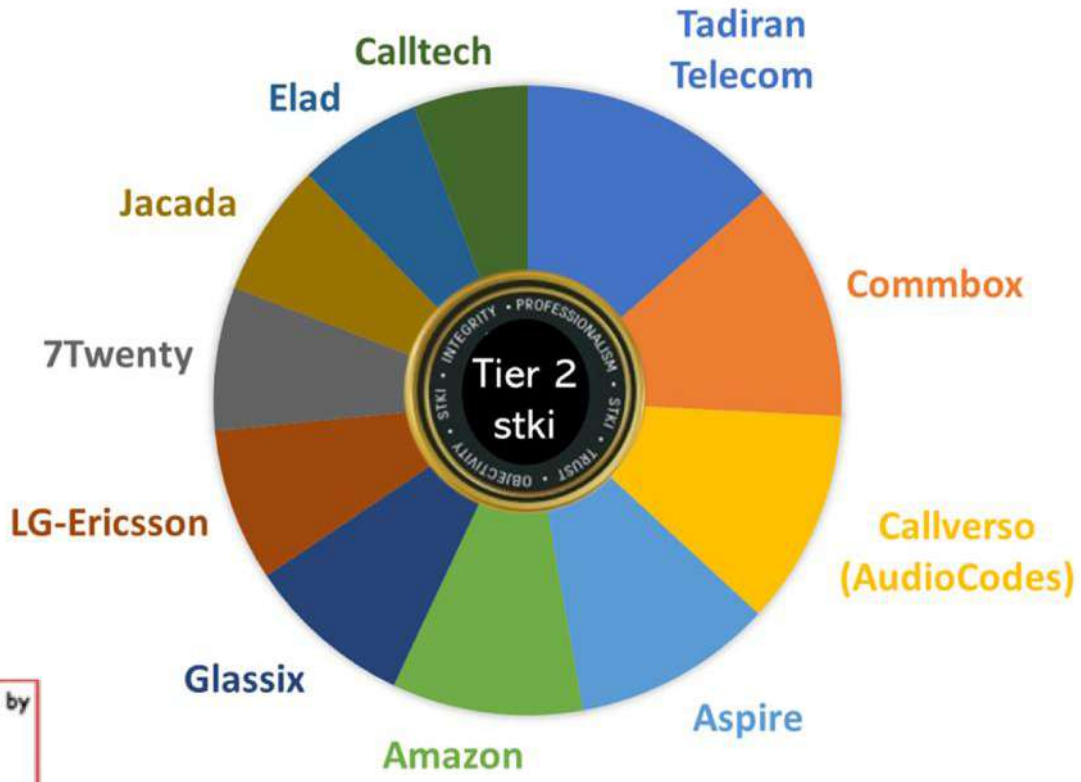

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OMNI – CHANNEL PLATFORMS

Package	Israeli Rep.	Integrators
Twillio	Aman	Aman
7Twenty	7Twenty	Matrix
Vongae (Nexmo)	KPMG	KPMG
Commbox	Commbox	eWave, Matrix, Hilan-NessPro
Glassix	Glassix, Consist	I.E Mittwoch, Consist
Simplechat	Elad	Elad
Microsoft Multi Channel	Microsoft Israel	Matrix DnA, Malam-Team, Abra
Salesforce Digital Engagement	Salesforce Israel	One BA Link, Aman Asperi, Elad
TechSee Remote agent assistance		

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MESSAGING BOTS FRAMEWORKS and TOOLS: 195

Package	Rep in Israel	Integrators
IBM Watson Assistant	IBM Israel	KPMG, Deloitte, EY, WebTech, Bynet Kaleidoo
Azure Bot Framework Azure Cognitive Services	Microsoft Israel	Microsoft MCS, Aiola, KPMG, Deloitte Azure Partners: Sela, Matrix, CloudValley, Codevalue, Hilan-Ness, Malam-Team, Elad Data…
Twillio	Aman	Aman, Yael Software
Google Dialogflow (+google translate)	Google Israel	Bynet Kaleidoo, Opsguru
Engage	Engage	MatrixDnA
Commbox	Commbox	Commbox
7Twenty	7Twenty	7Twenty
Simplechat	Elad	Elad
Rasa	Open source conversational AI	

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DIGITAL INTELLIGENCE SOLUTIONS 196

Package	Rep in Israel	Integrators
Google Analytics Google 360	Google Israel	One – Tingz & Saban, Elad, Matrix, Mihi market…
Glassbox (Interaction analytics)	Hilan-Ness-Pro	Hilan-Ness-Pro
Matomo (Piwik)		One- Saban
Hotjar (heat maps)		
Mixpanel	Yael Group	Yael Group
Adobe Analytics (Omniture) Adobe Journey Analytics Adobe Target (Personalization)	Deloitte Israel	Deloitte Israel
Oracle (Web Trends, CX Unity, Infinity, maxymizer)	Oracle Israel	
Salesforce (Evergage) Real time personalization	Salesforce Israel	
SAS	Mia Computers	
Acoustic CXA	Be2See (Emet)	Be2See (Emet)

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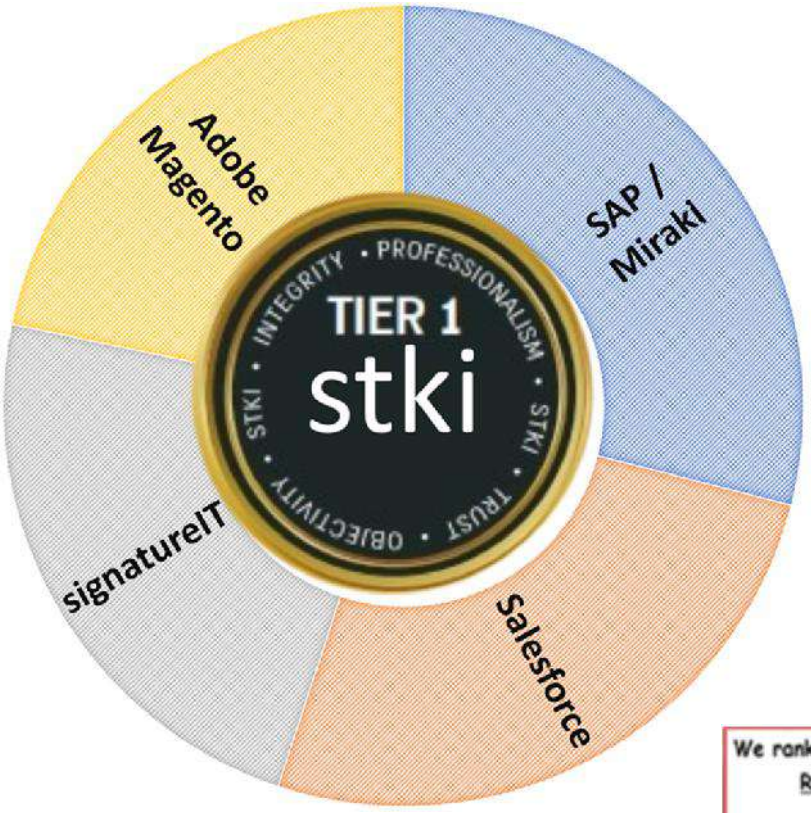
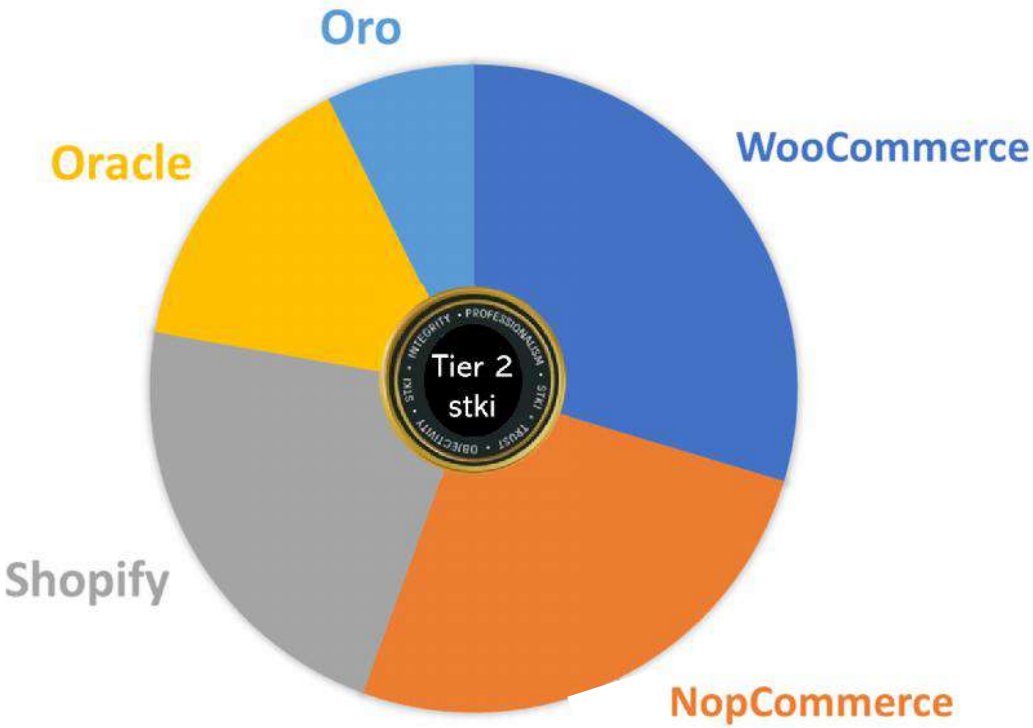
E-Commerce & Marketplace Platforms 197





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ECOMMERCE and MARKETPLACE PLATFORMS 198

Vendors to watch:
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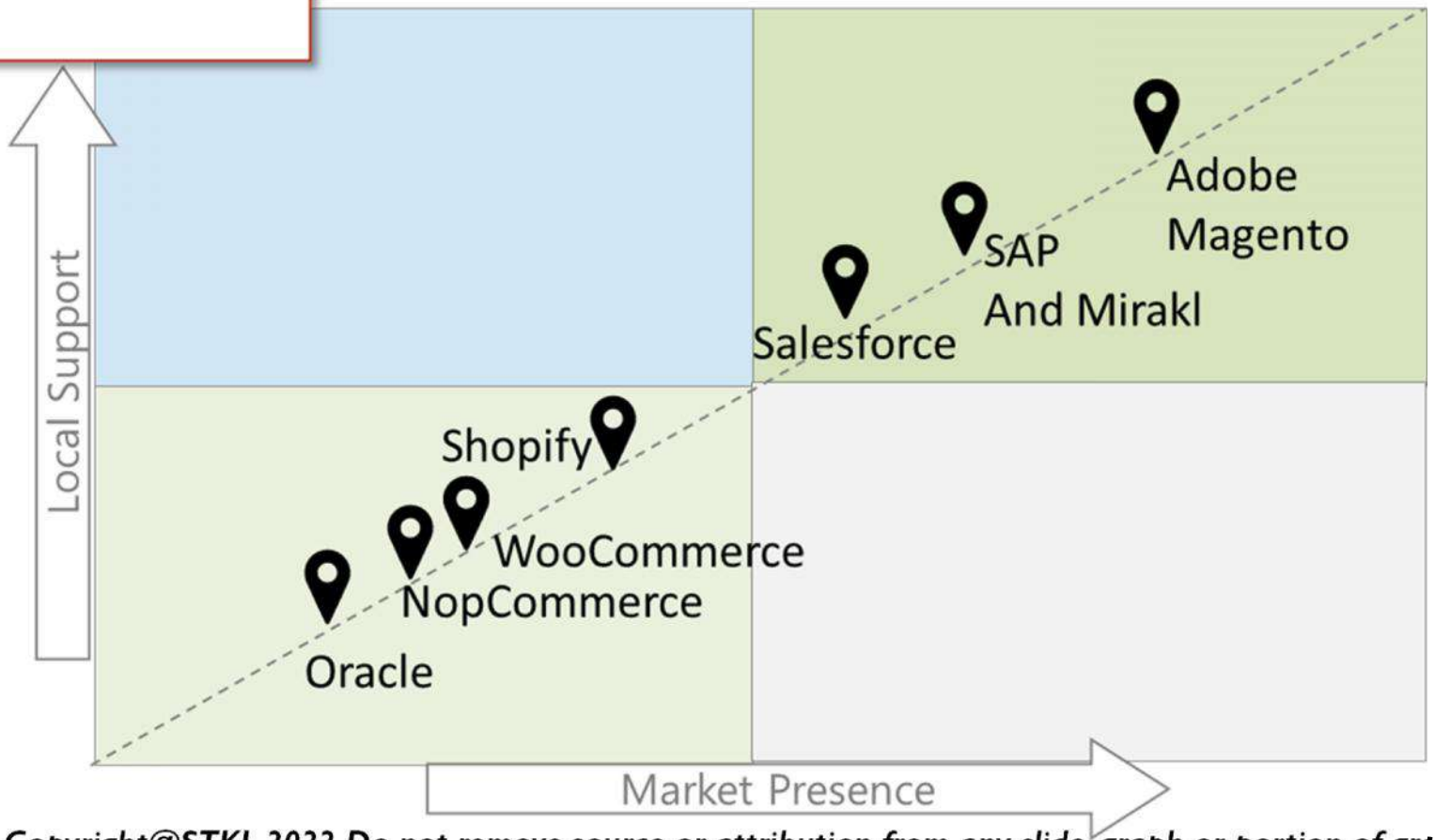

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E-COMMERCE PACKAGES INTEGRATORS– Part 1

Package	Rep/Integrators in Israel
SAP Commerce (Hybris), Marketplace	NGSoft, Seidor-Malam Team, SAP, Deloitte, EY, Ideo Digital, Hilan-Ness
Oracle Commerce + Commerce Cloud	Oracle Israel
Salesforce Commerce Cloud	Salesforce, Elad, One1, Deloitte, Bay Bridge
Signature-IT (PIM + eCommerce)	SignatureIT, Hilan-NessPro
NetSuite SuiteCommerce	Netcloud, One1, iCloudius, AllCloud, Deloitte , Top Solutions, WinIT
Microsoft Dynamics 365 Commerce	Microsoft Israel
Priority (Retail module)	Priority, Edea
Adobe (Magento)	Elad, Yael, abra, CodeOasis, Matrix, Ideo Digital, Ewave, One1, Malam-Team, Betanet, SignatureIT

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E-COMMERCE PACKAGES INTEGRATORS– Part2

Package	Rep/Integrators in Israel
NopCommerce	Ideo Digital, Matrix, NGSoft, Malam-Team
Shopify	Elad, IdeoDigital, Girit Interactive, Ewave
WooCommerce (WordPress)	Girit Interactive, SignatureIT, Junami, Ewave, Coral, SITEL, Matrix
Umbraco Commerce	Elad, Hilan-Ness, Aman, Ewave, Matrix
Site Vision	Malam-Team (Pionet)
Akeneo (PIM)	Elad
Oro	abra

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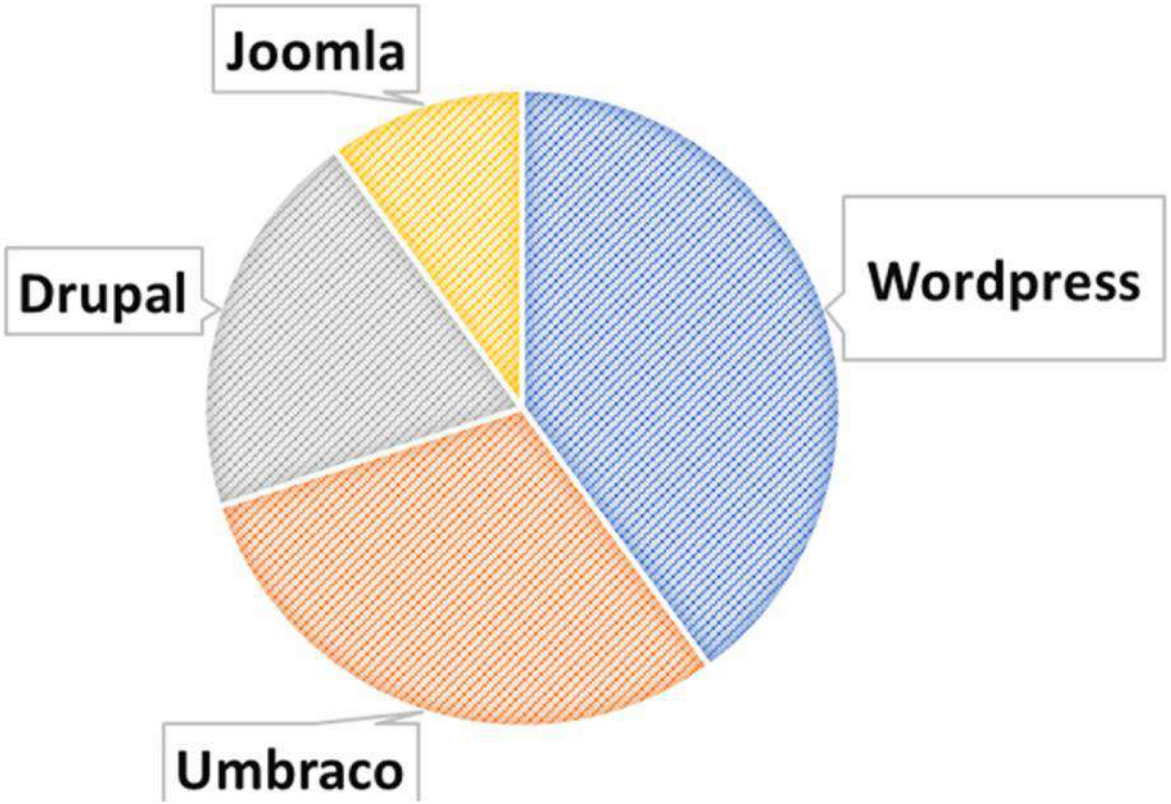
Web Content Management Platforms 201



VARs

Web Content Management Platforms Alphabetically
CodeOasis
Elad
Ewave
Hilan-Ness-DXC
Malam-Team
Matrix
NGSoft
One
Yael

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Blockchain Platforms & VARS

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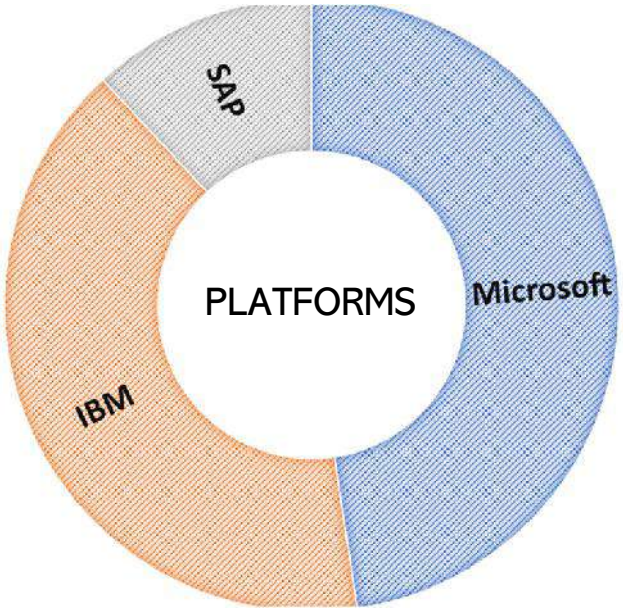

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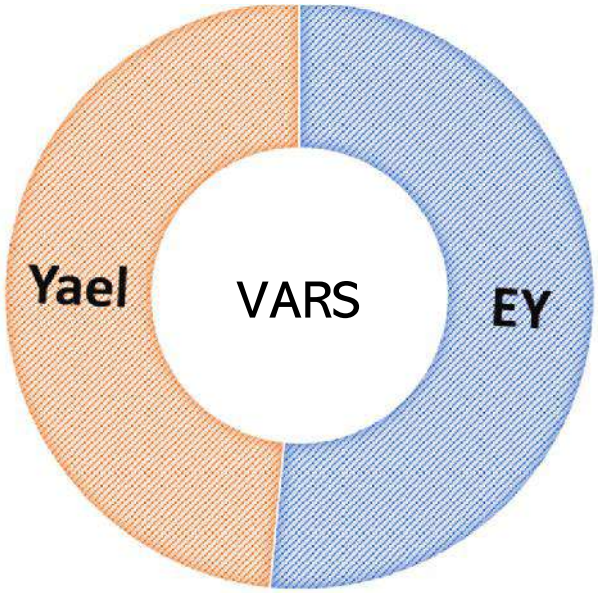

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RPA Platforms

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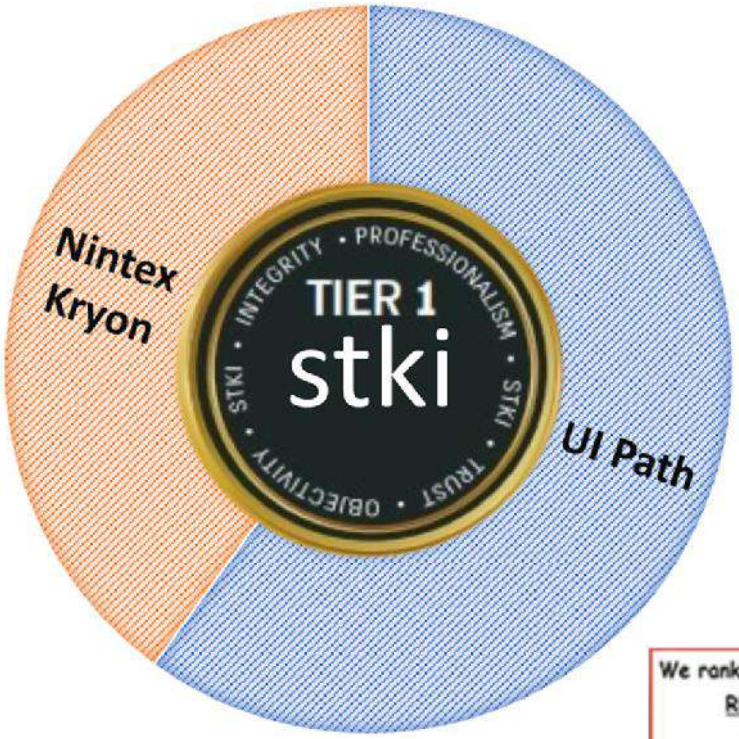

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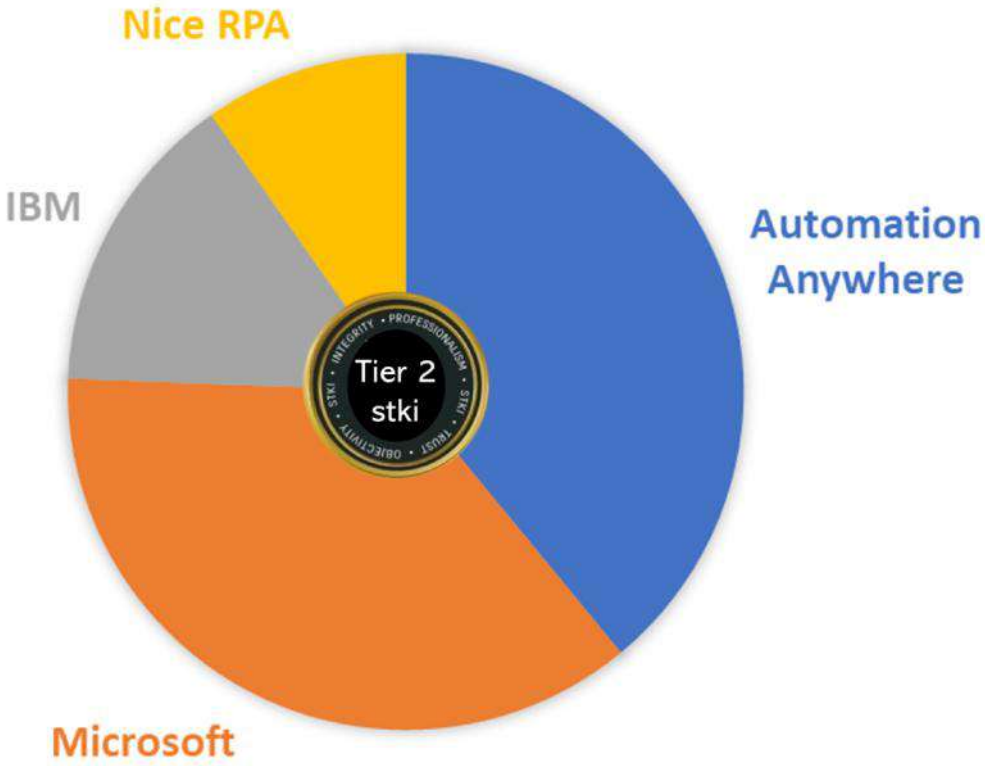

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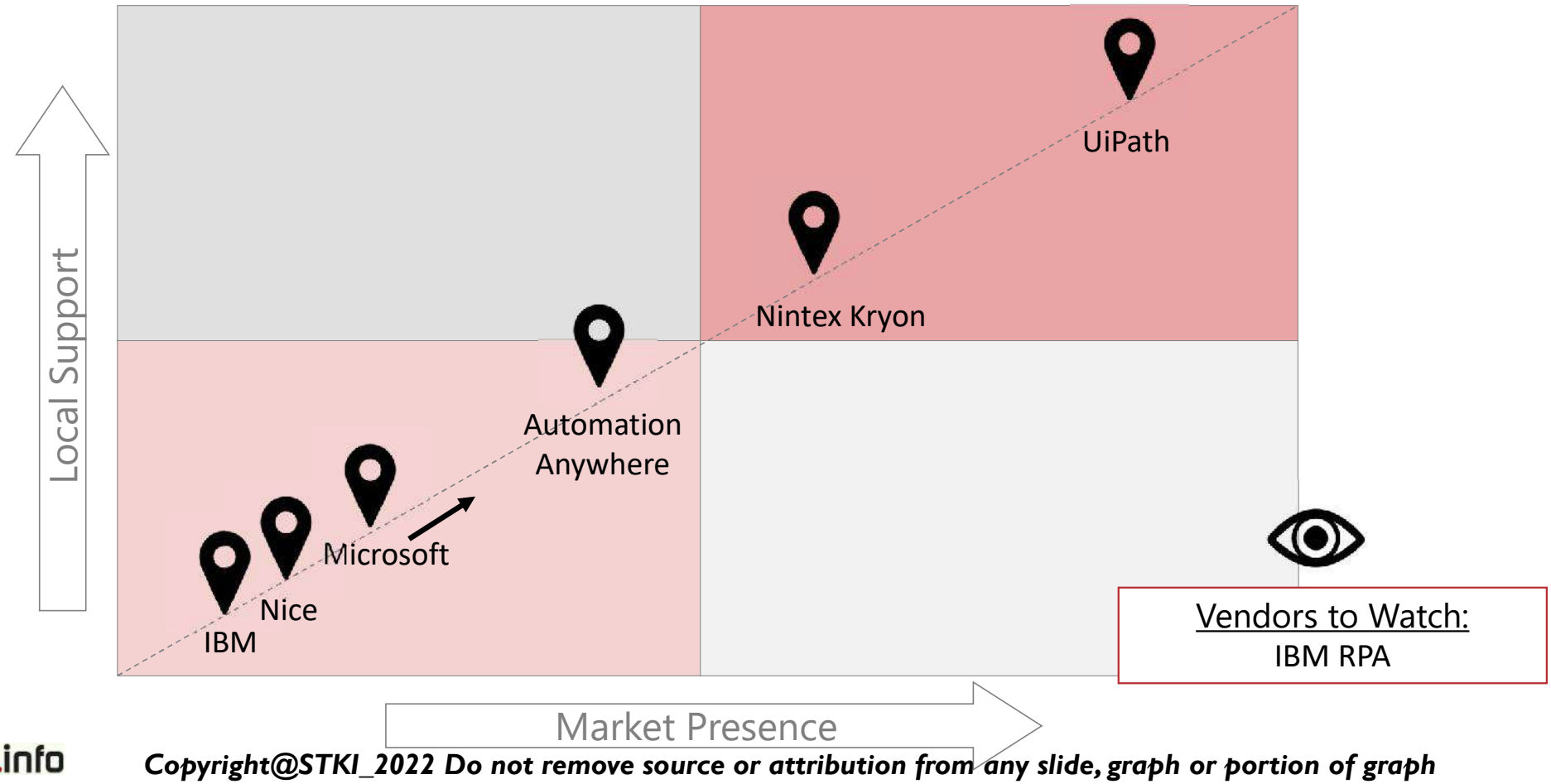
RPA (ROBOTIC PROCESS AUTOMATION) TOOLS 204



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RPA Tools & Integrators in Israel

	Integrators
Kryon	Bynet, EY, IBM, KPMG, EZ ROI, TED-S, NESS, Matrix, Direct
UiPath	HMS, EY, IBM, KPMG, Malam, Matrix, Ness, Valor, Aman, PWC
Microsoft RPA	Malam, Matrix, Ness, Elad, KPMG, BizAid
Automation Anywhere	EY, IBM, KPMG, Yael, Matrix, Ness, Bynet
IBM RPA	IBM, ABP, Malam
NICE RPA	Deloitte, Valor

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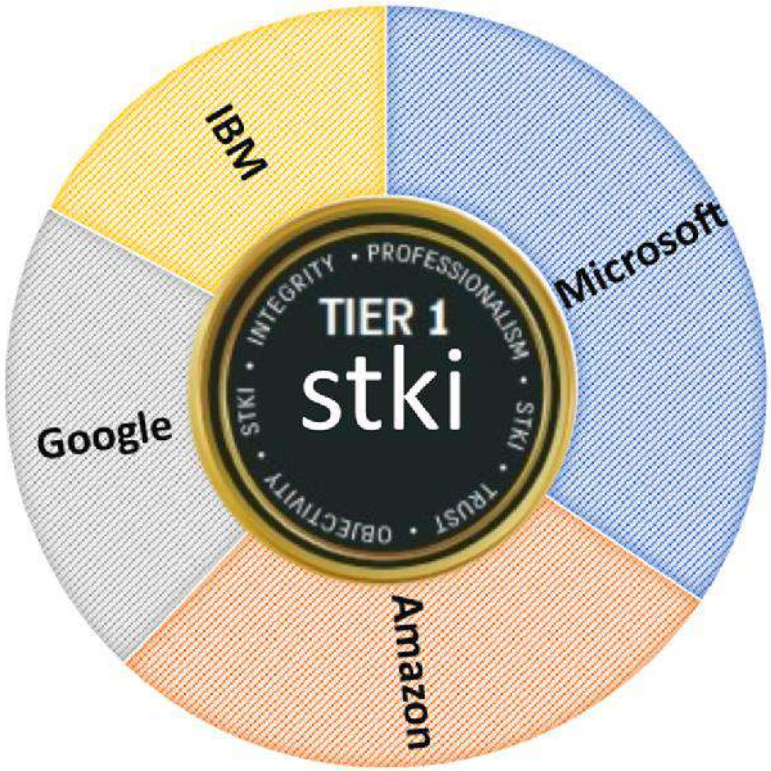
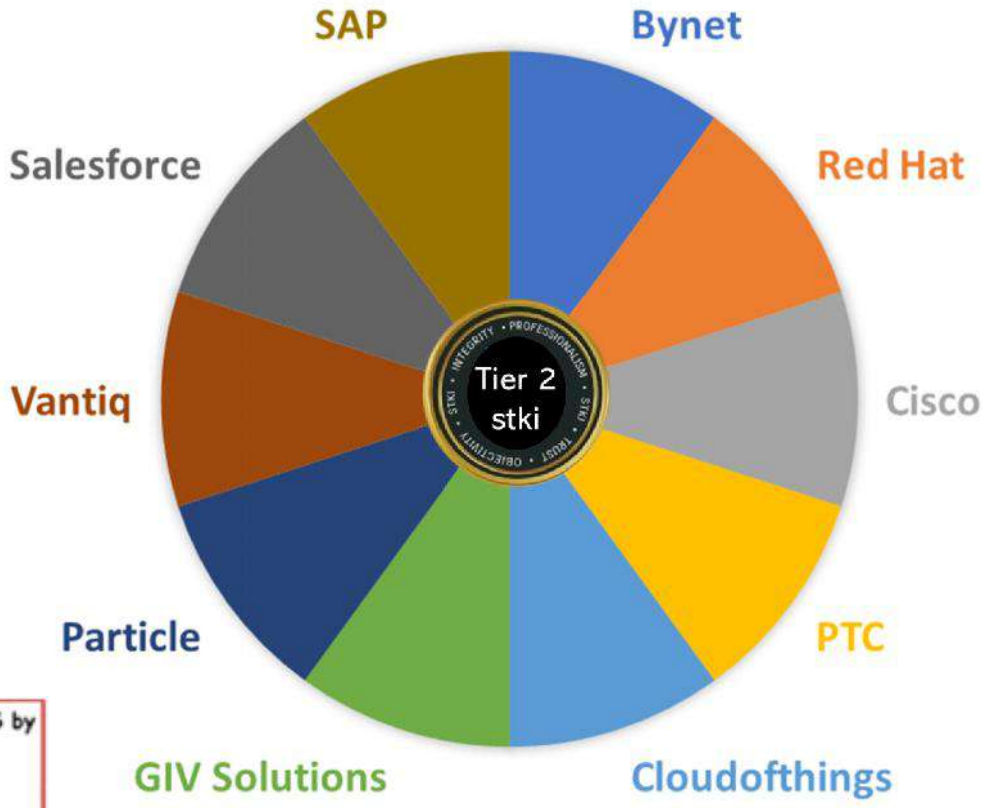
IoT Tools and Platforms





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Industry Specific and Special Purpose Applications MARKET 2018-2022

208

	2018		2019		2020		2021		2022
GIS, WMS, transportation, etc	$100.00	10.00%	$110.00	-22.73%	$85.00	17.65%	$100.00	20.00%	$120.00
banking, insurance and other financial market software	$80.00	12.50%	$90.00	-27.78%	$65.00	23.08%	$80.00	25.00%	$100.00
TOTALS	$180.00	11.11%	$200.00	-25.00%	$150.00	20.00%	$180.00	22.22%	$220.00

Values in Million USD

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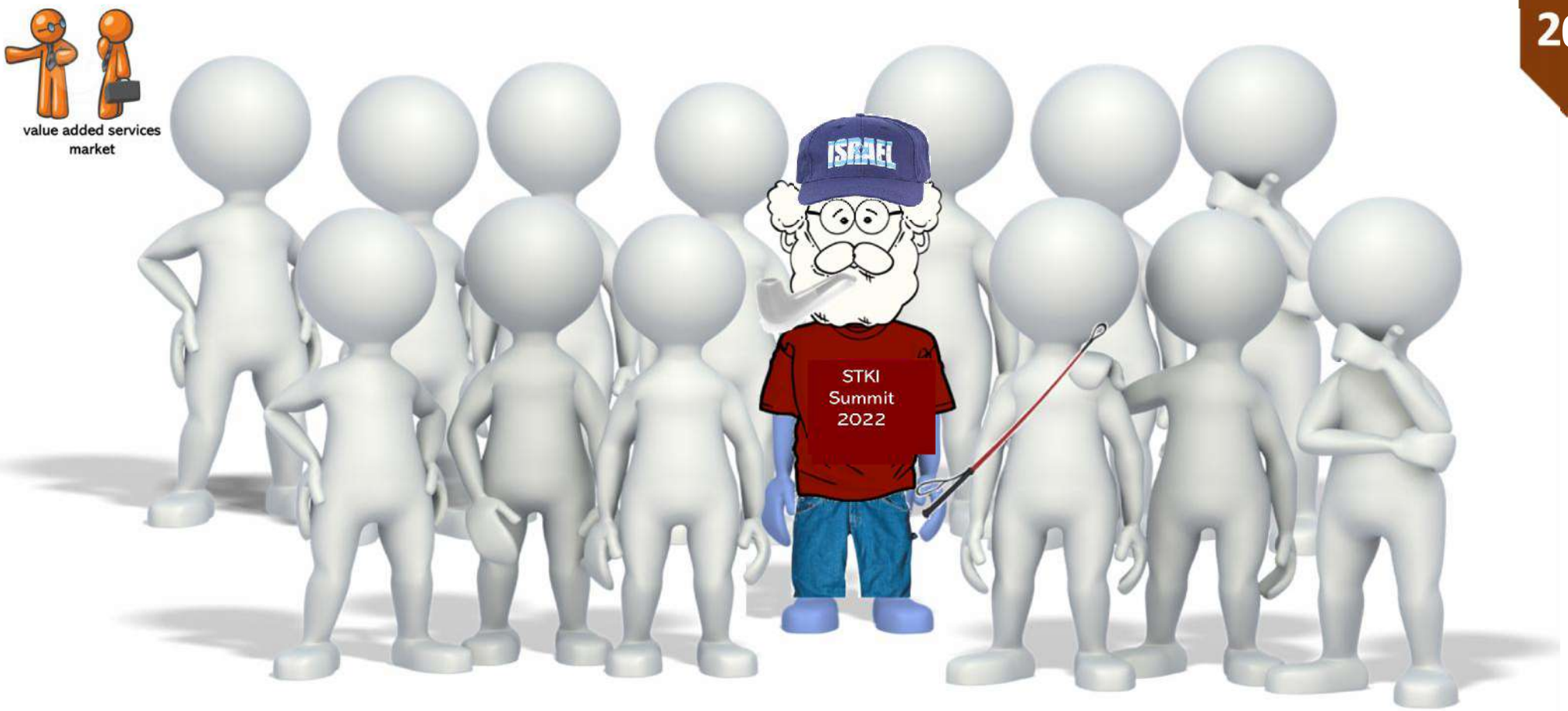

VALUE ADDED SERVICES

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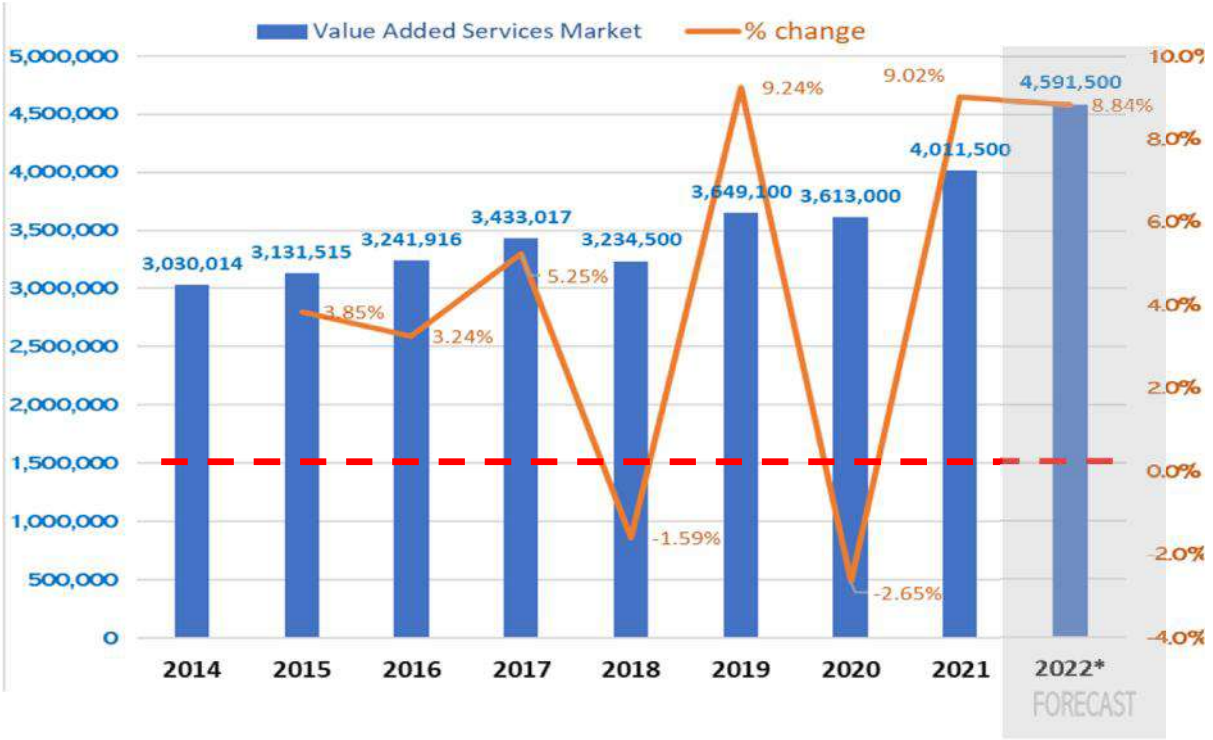
VALUE ADDED SERVICES MARKET



Values in K USD

Value Added Services Market	2014	2015	2016	2017	2018	2019	2020	2021	2022*
	3,030,014	3,131,515	3,241,916	3,433,017	3,234,500	3,649,100	3,613,000	4,011,500	4,591,500
% change		3.85%	3.24%	5.25%	-1.59%	9.24%	-2.65%	9.02%	8.84%

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value added services market

TOP VENDORS: Value-Added Services Markets 211

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"ENTERPRISE" CONSULTING MARKET 2018-2022

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	2018		2019		2020		2021		2022
IT Strategy Consulting	$27.50	5.45%	$29.00	13.79%	$33.00	21.21%	$40.00	7.50%	$43.00
Organizational & Digital Transformation Consulting (inc. change mngt, agile consulting, etc.)	$14.00	7.14%	$15.00	40.00%	$21.00	42.86%	$30.00	40.00%	$42.00
Data Strategy Consulting	$9.50	36.84%	$13.00	53.85%	$20.00	60.00%	$32.00	40.63%	$45.00
IT Infrastructure & Cloud Consulting	$13.00	3.85%	$13.50	33.33%	$18.00	38.89%	$25.00	60.00%	$40.00
Application Projects Consulting	$23.00	15.22%	$26.50	20.75%	$32.00	9.38%	$35.00	8.57%	$38.00
Customer & Employee Experience consulting (customer journeys, service design)	$17.00	17.65%	$20.00	50.00%	$30.00	40.00%	$42.00	26.19%	$53.00
Automation & Process Consulting	$6.00	33.33%	$8.00	50.00%	$12.00	50.00%	$18.00	38.89%	$25.00
Project Management/ OCIO Consulting	$12.00	16.67%	$14.00	28.57%	$18.00	38.89%	$25.00	44.00%	$36.00
Cyber Security Consulting	$26.00	7.69%	$28.00	50.00%	$42.00	47.62%	$62.00	20.97%	$75.00
TOTALS	$148.00	12.84%	$167.00	35.33%	$226.00	36.73%	$309.00	28.48%	$397.00

Values in Million USD

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value added services market

IT Strategy Consulting

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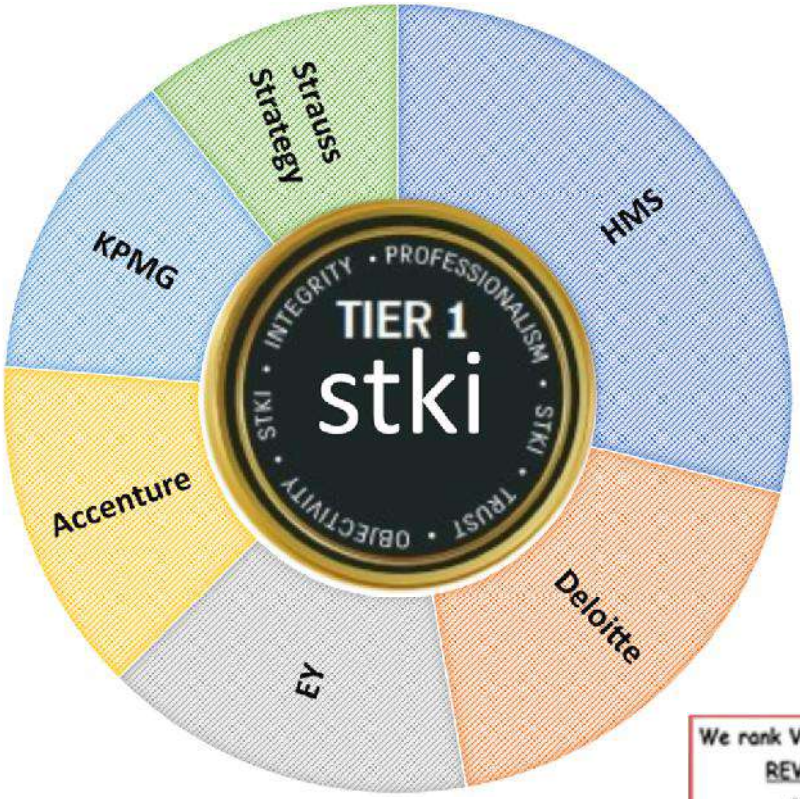

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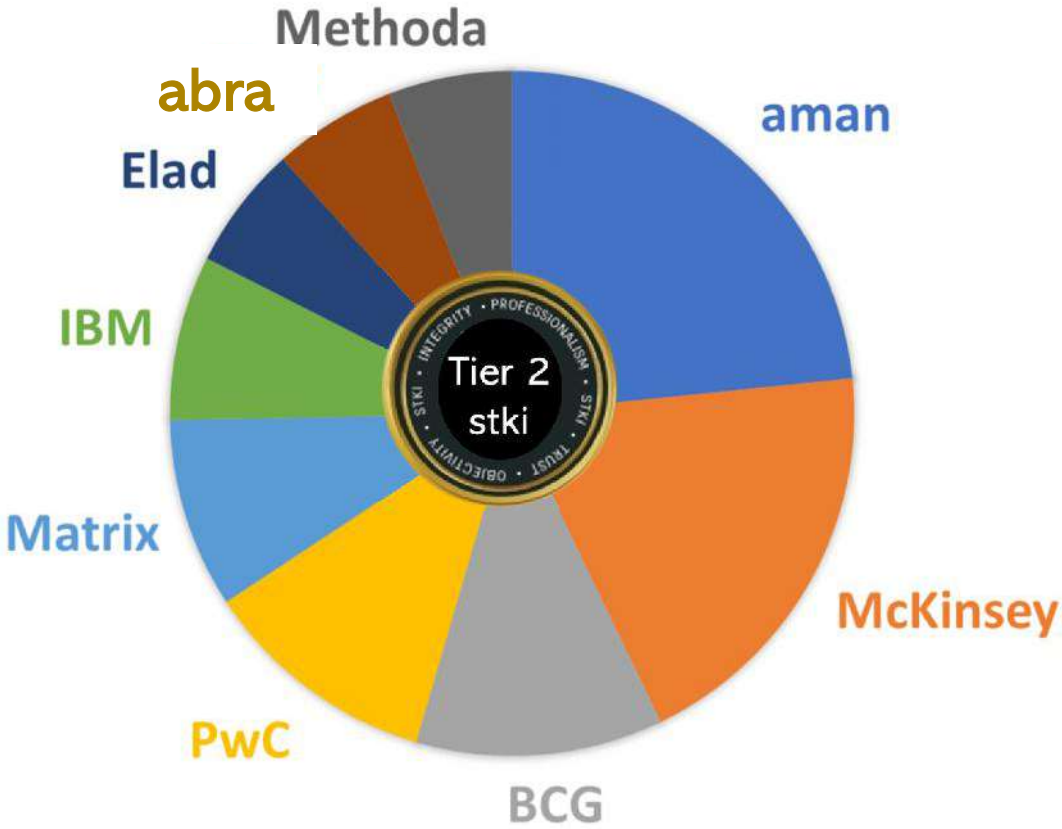

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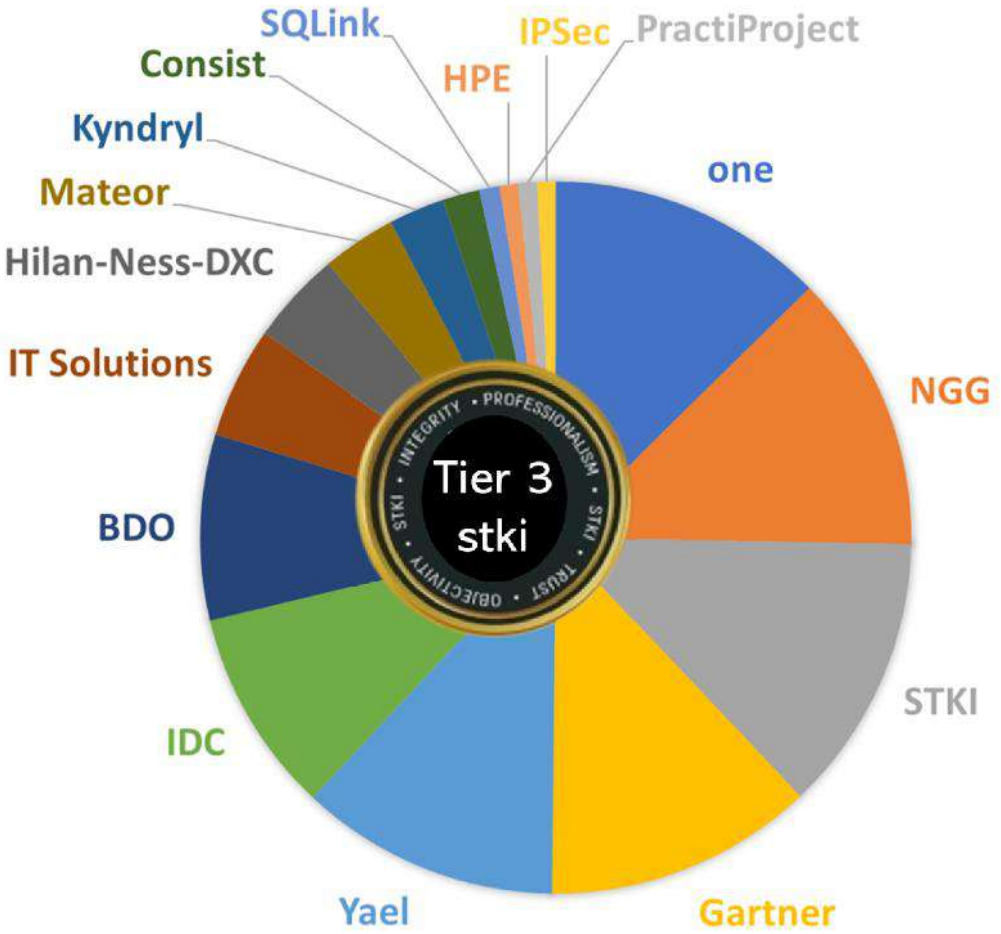

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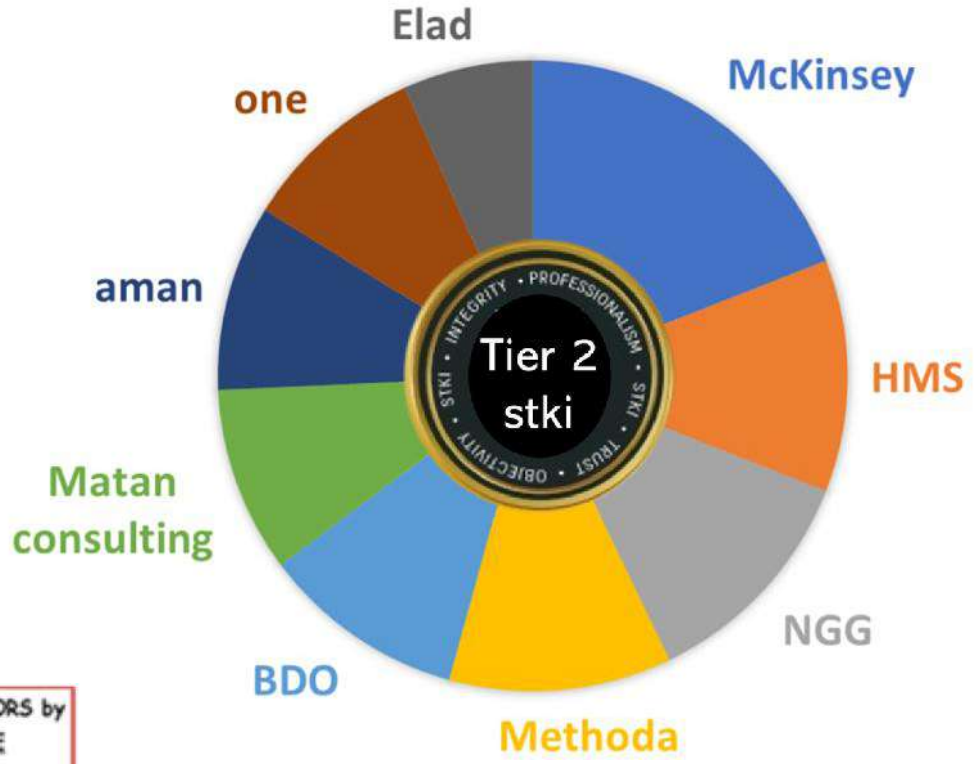

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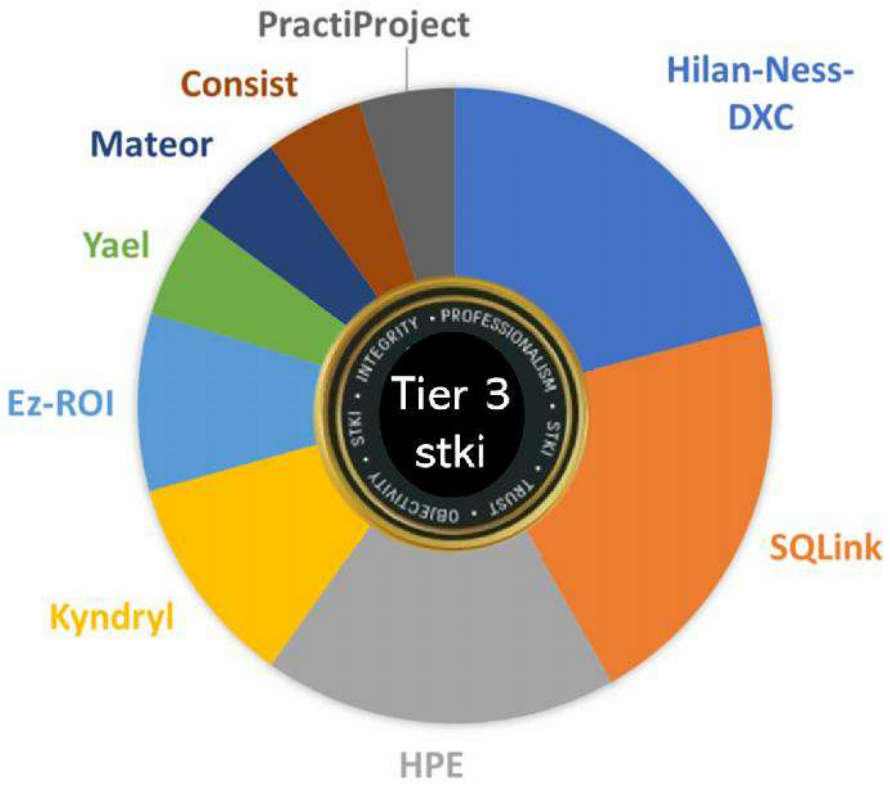

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Data Strategy Consulting

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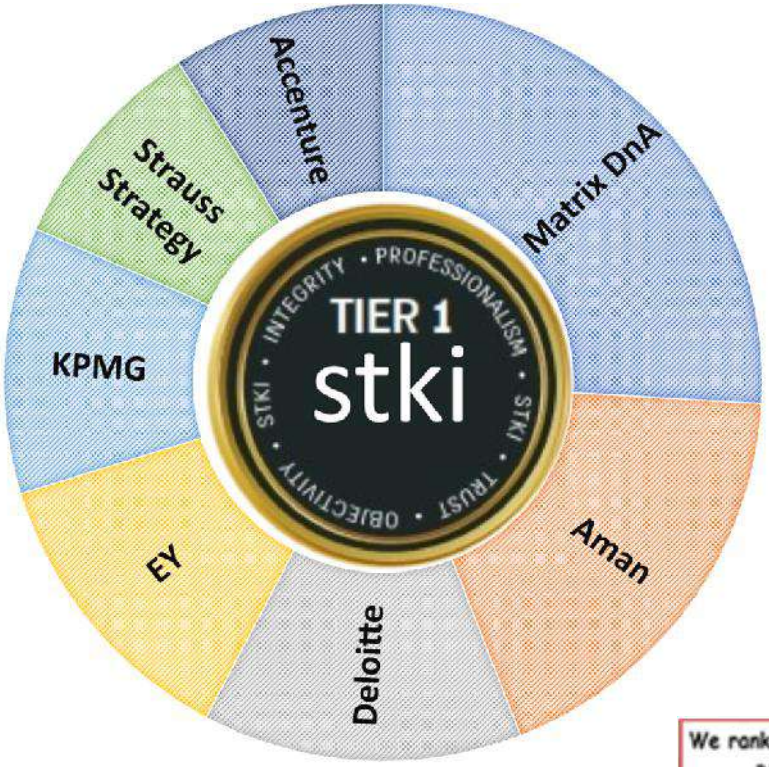

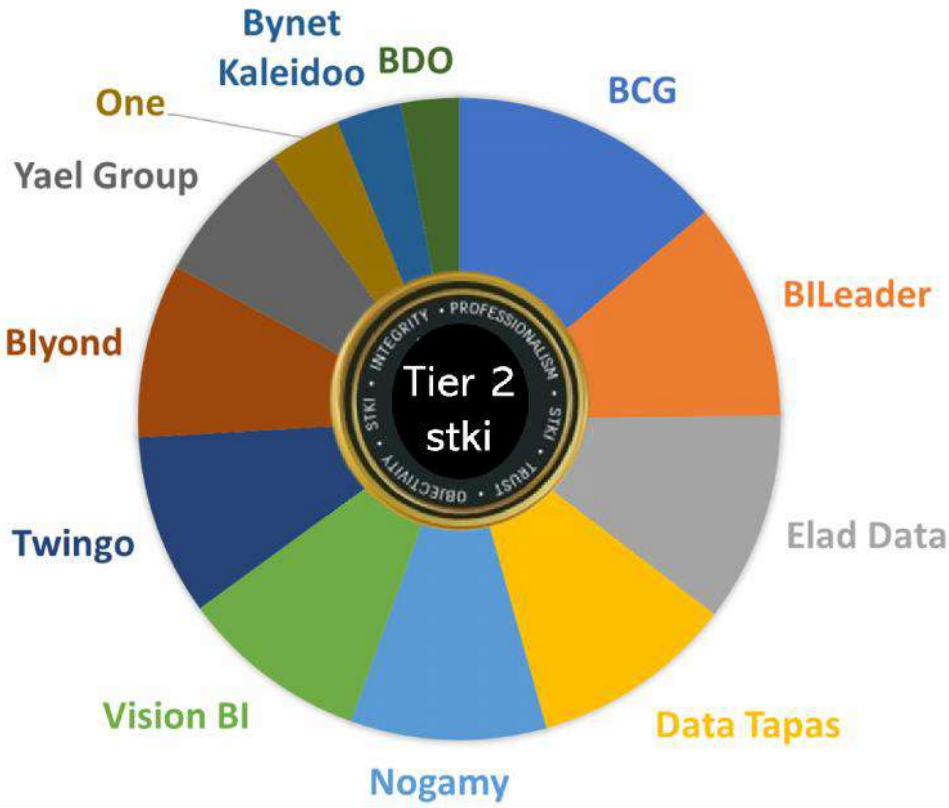

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Data Strategy Consulting

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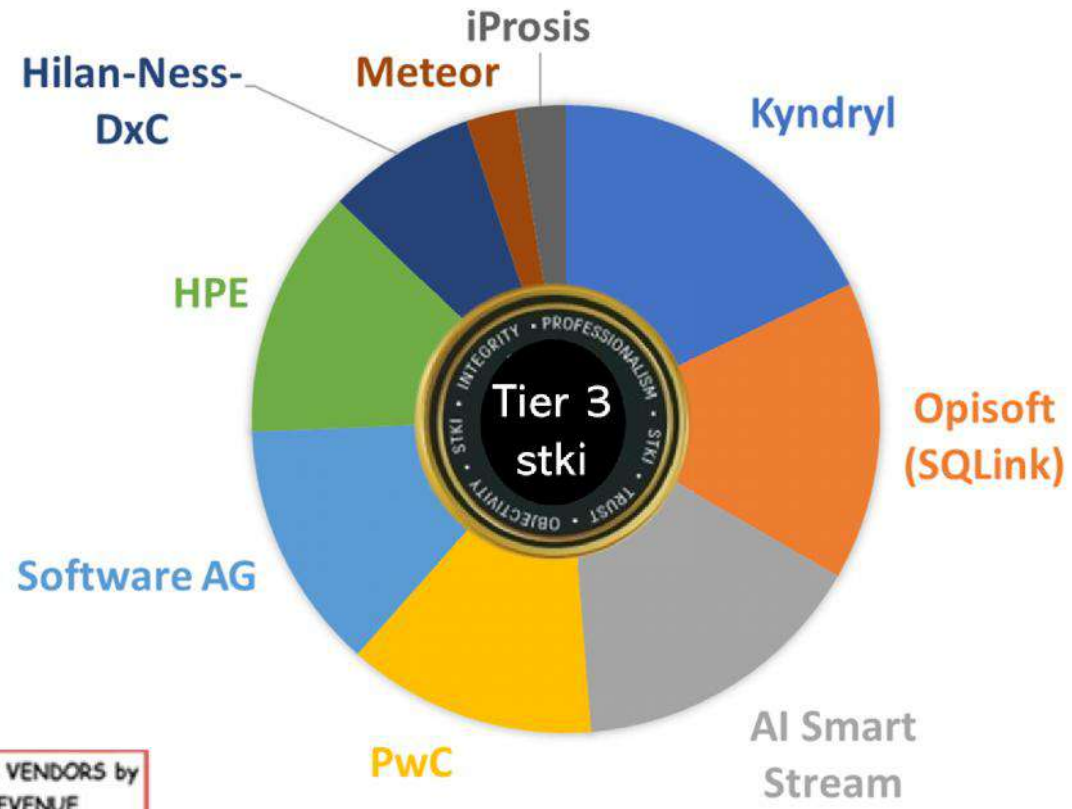

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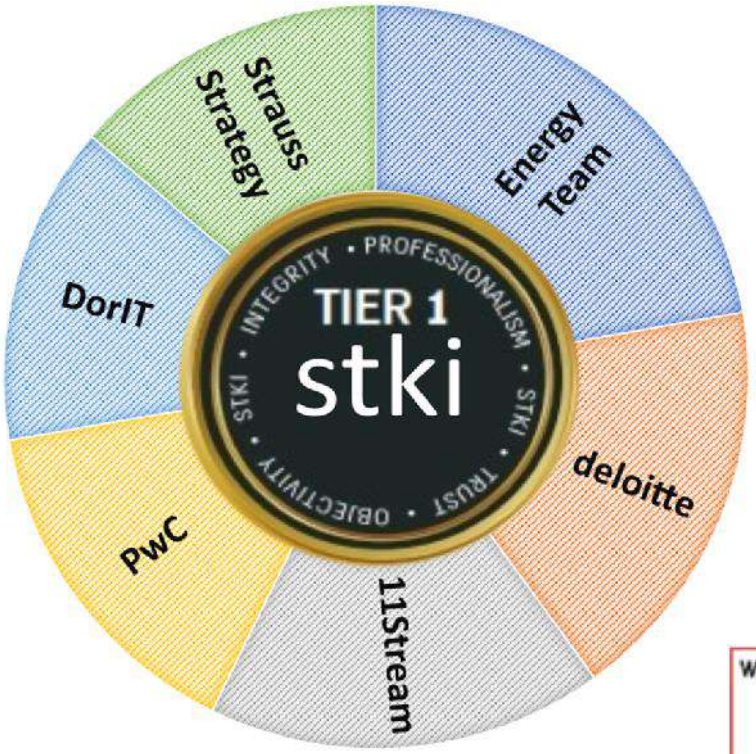
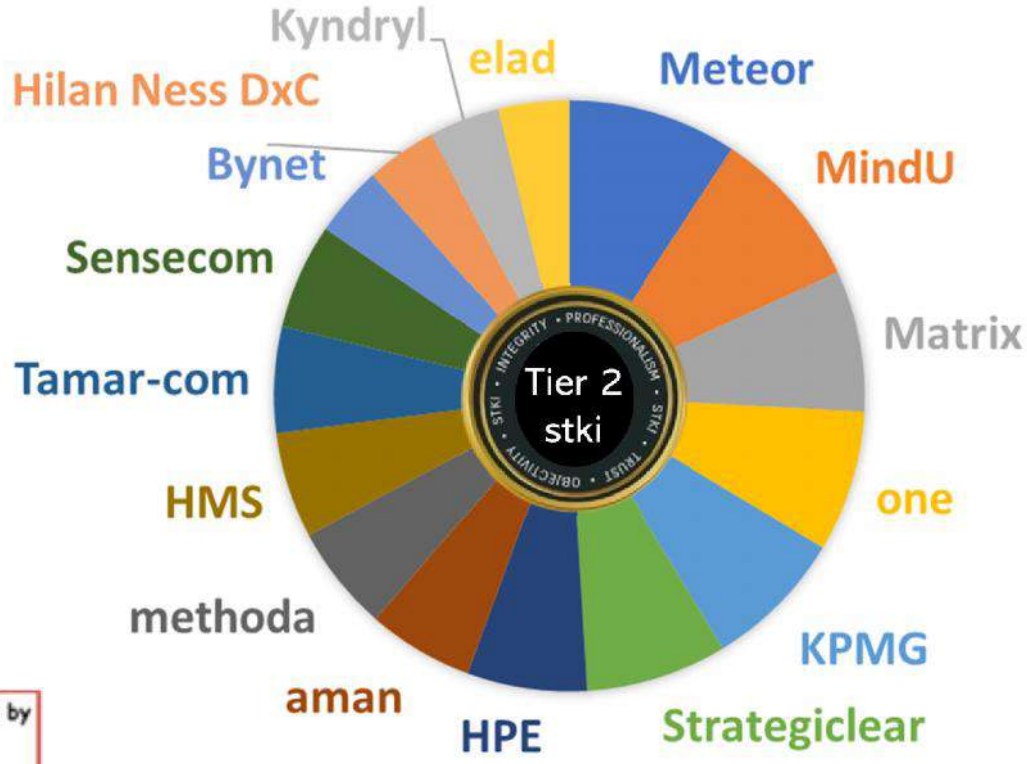
IT Infrastructure & Cloud Consulting 220





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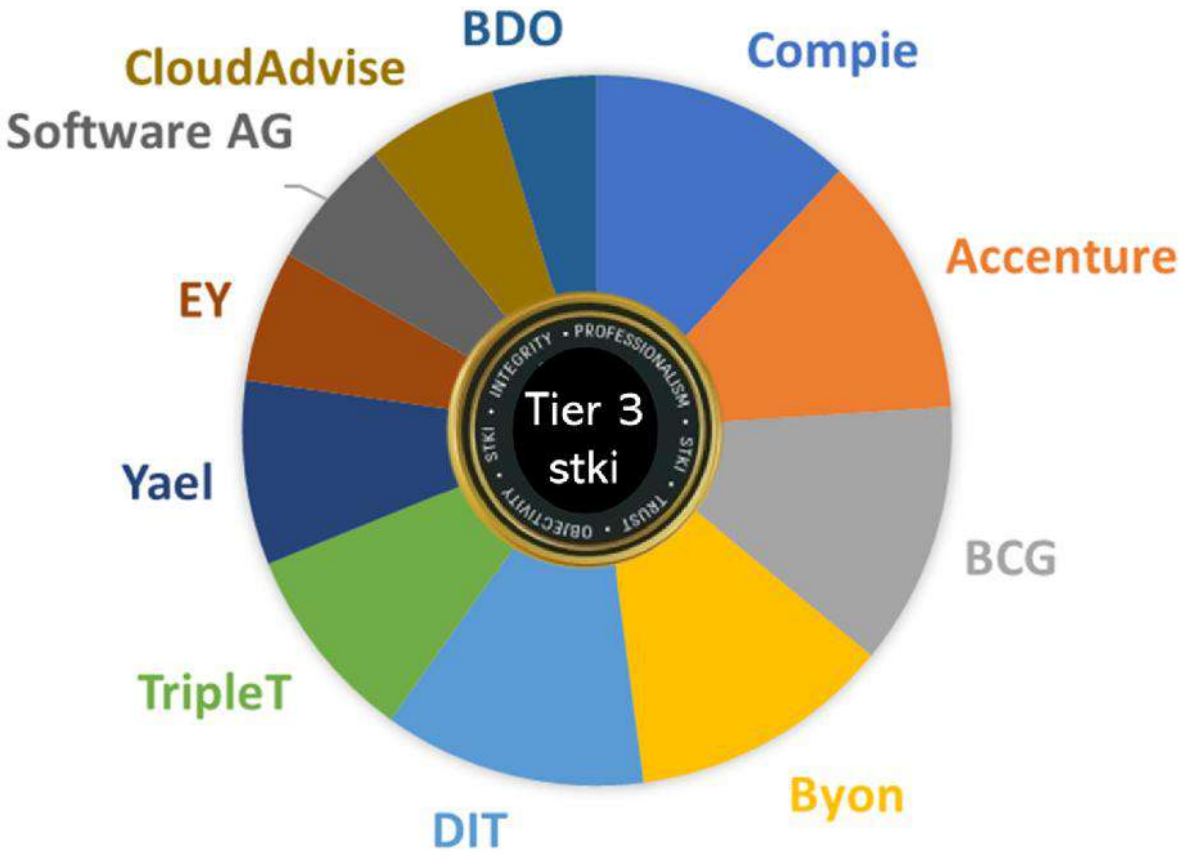

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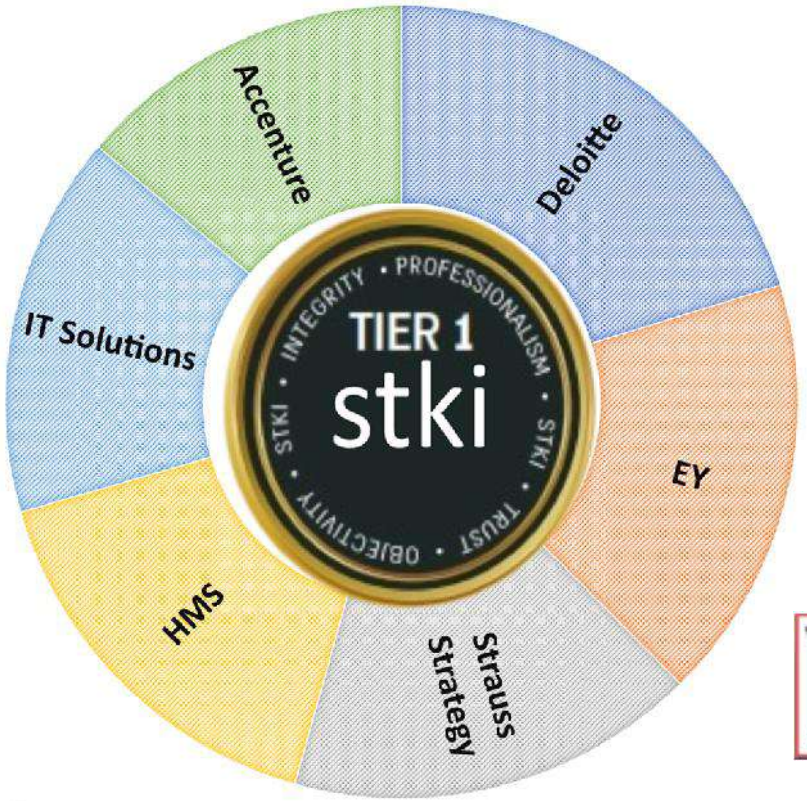
Application Projects Consulting 222



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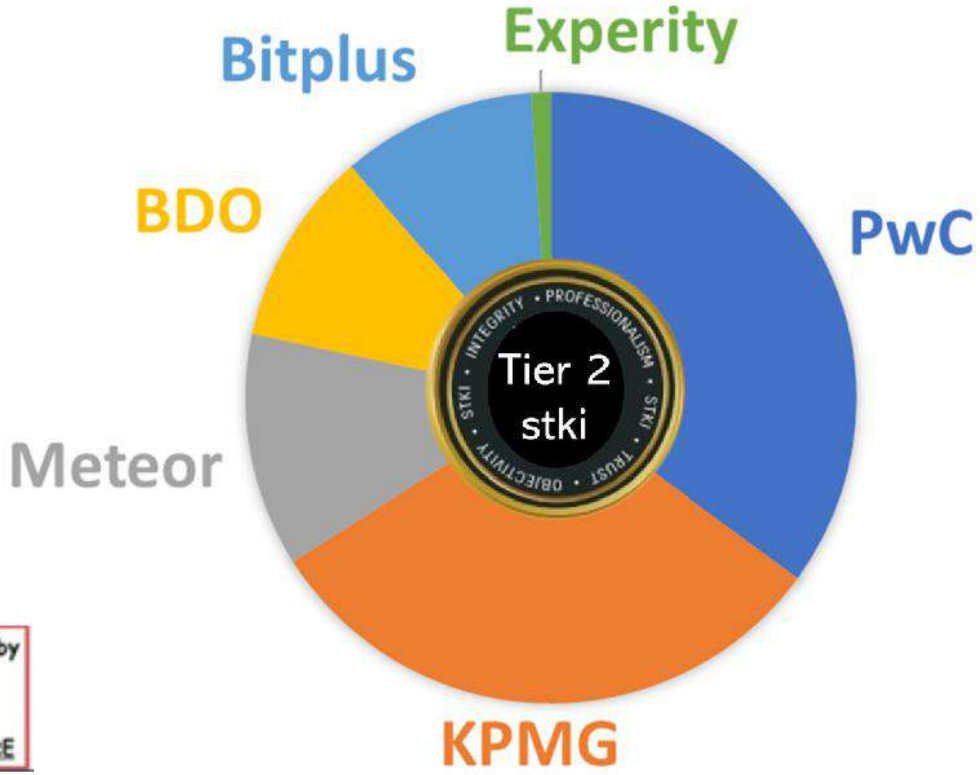
and
CLIENT MINDSHARE



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value added services market

Customer & Employee Experience Strategy Consulting (customer journeys, service design)

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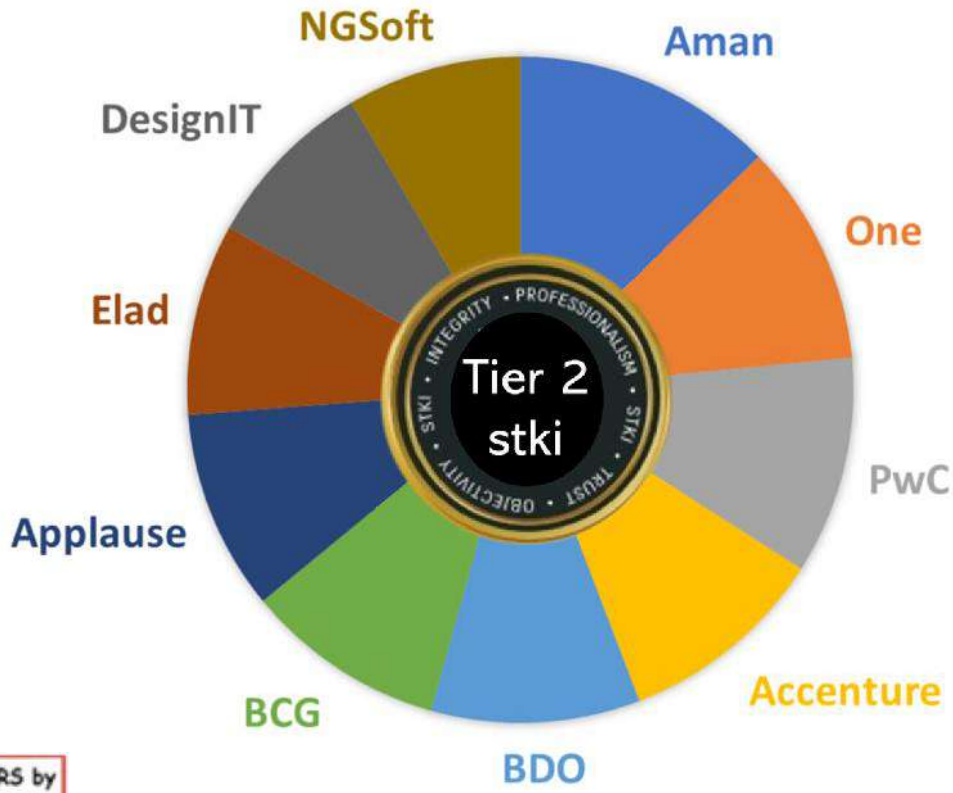

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Customer & Employee Experience Strategy Consulting (customer journeys, service design)

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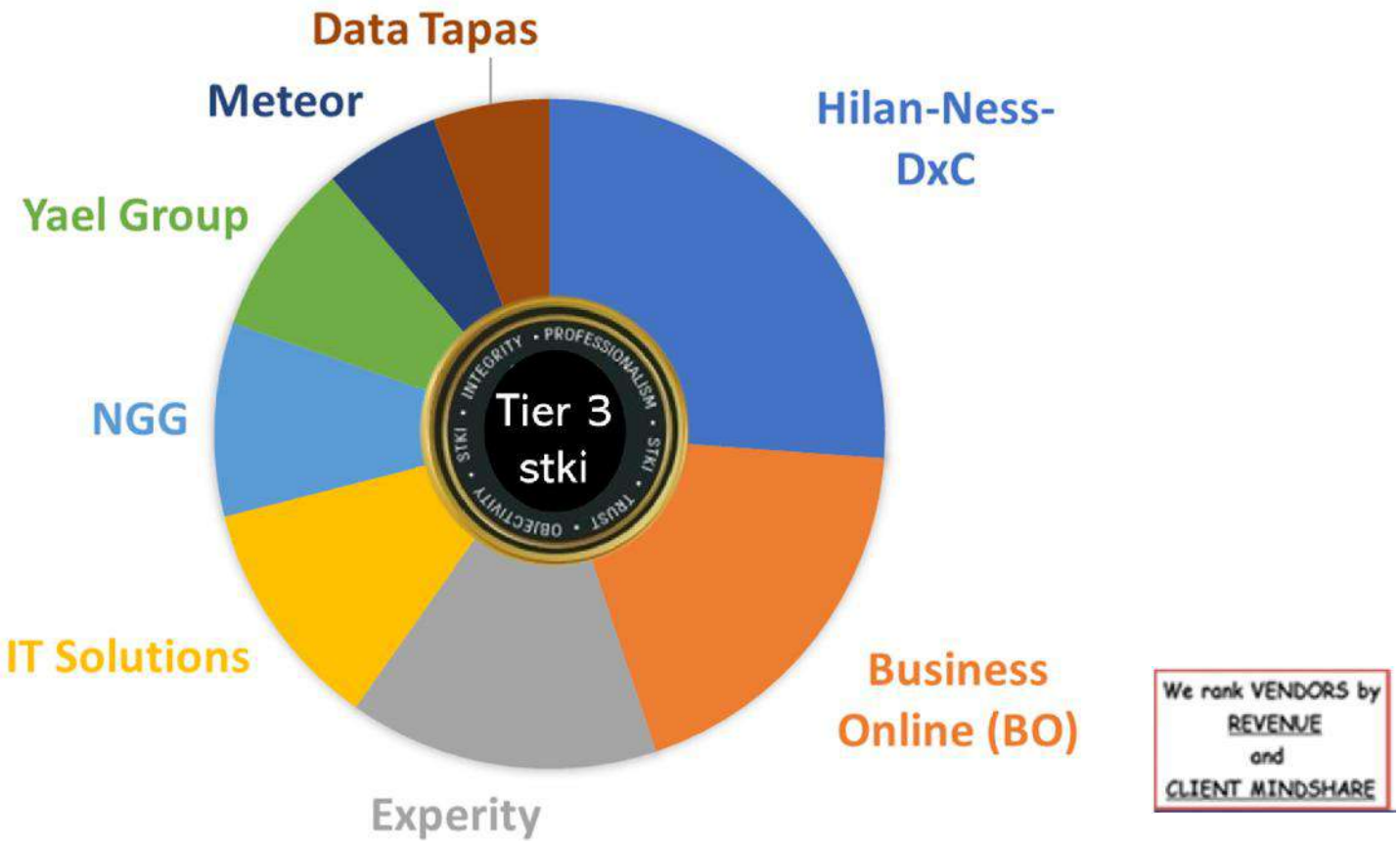

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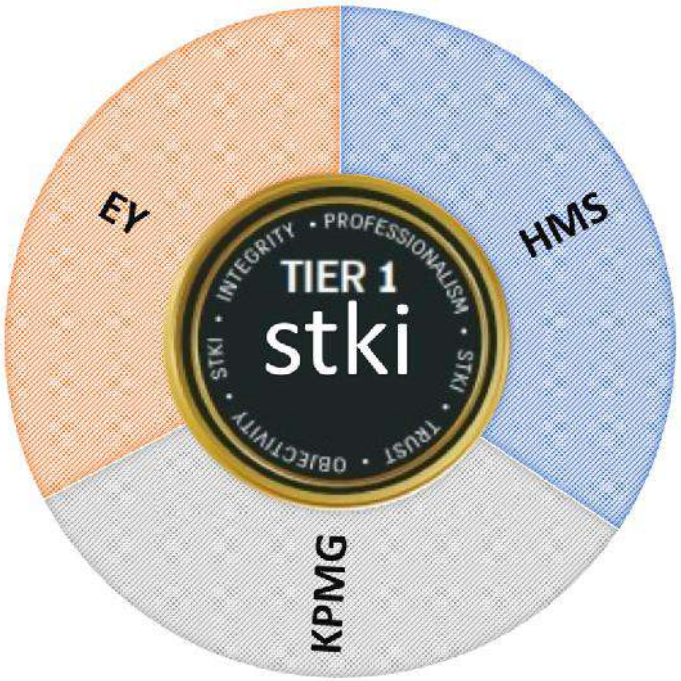
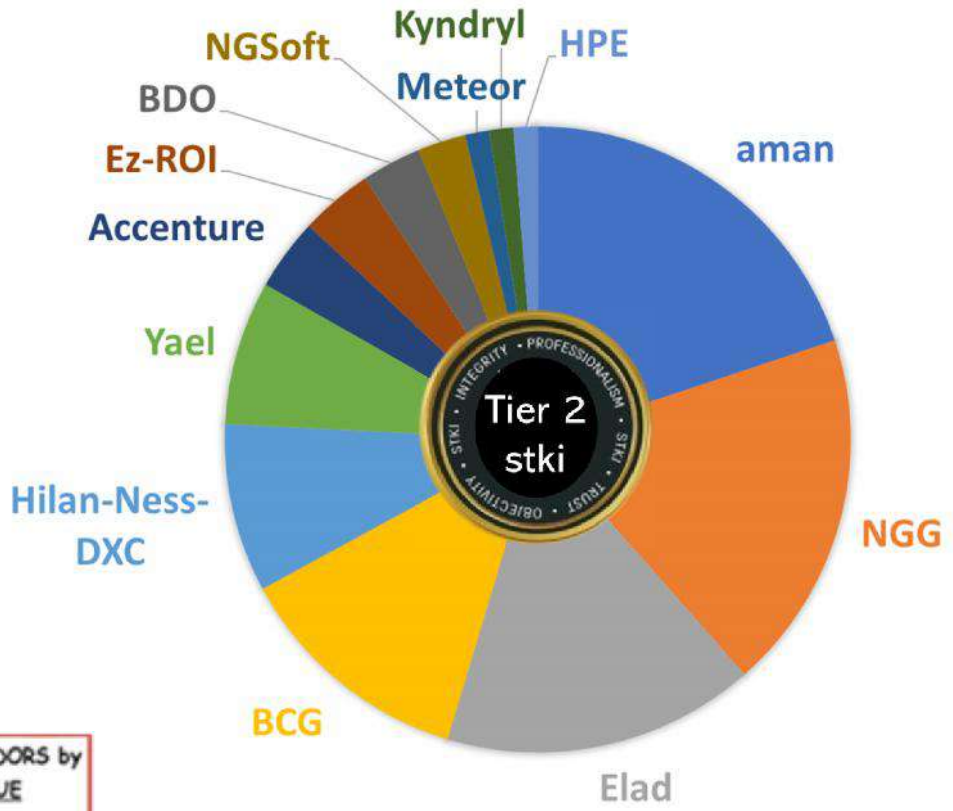
value added services market

Automation & Process Consulting 225





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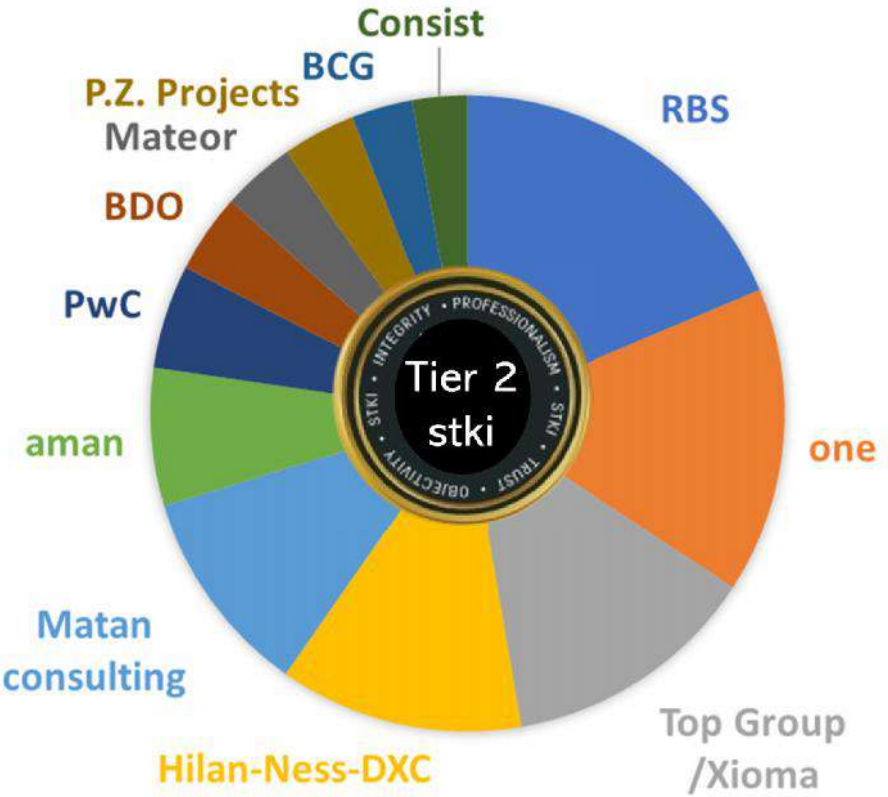
Project Management/ OCIO Consulting 226



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value added services market

Cyber Security Consulting

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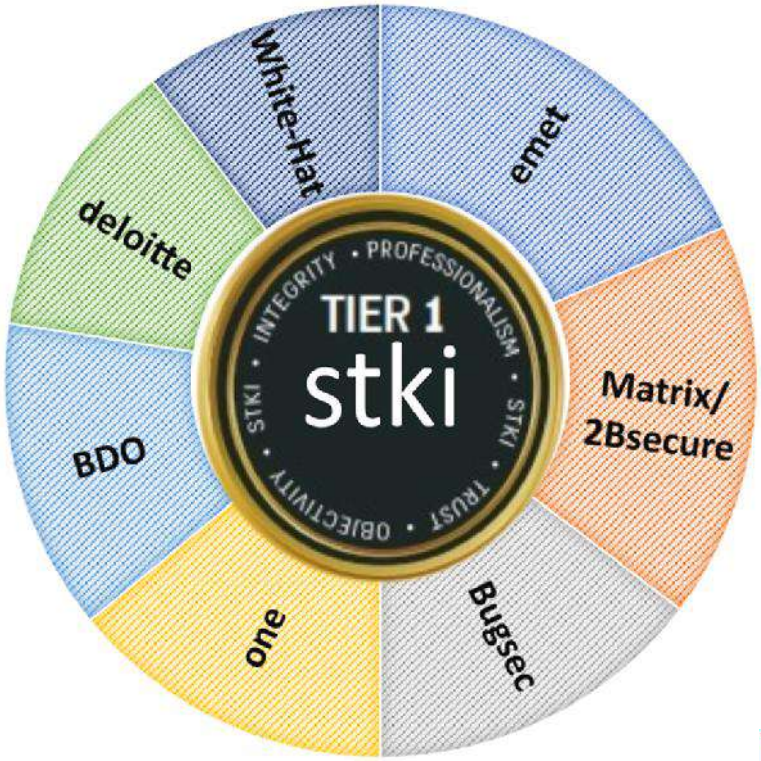

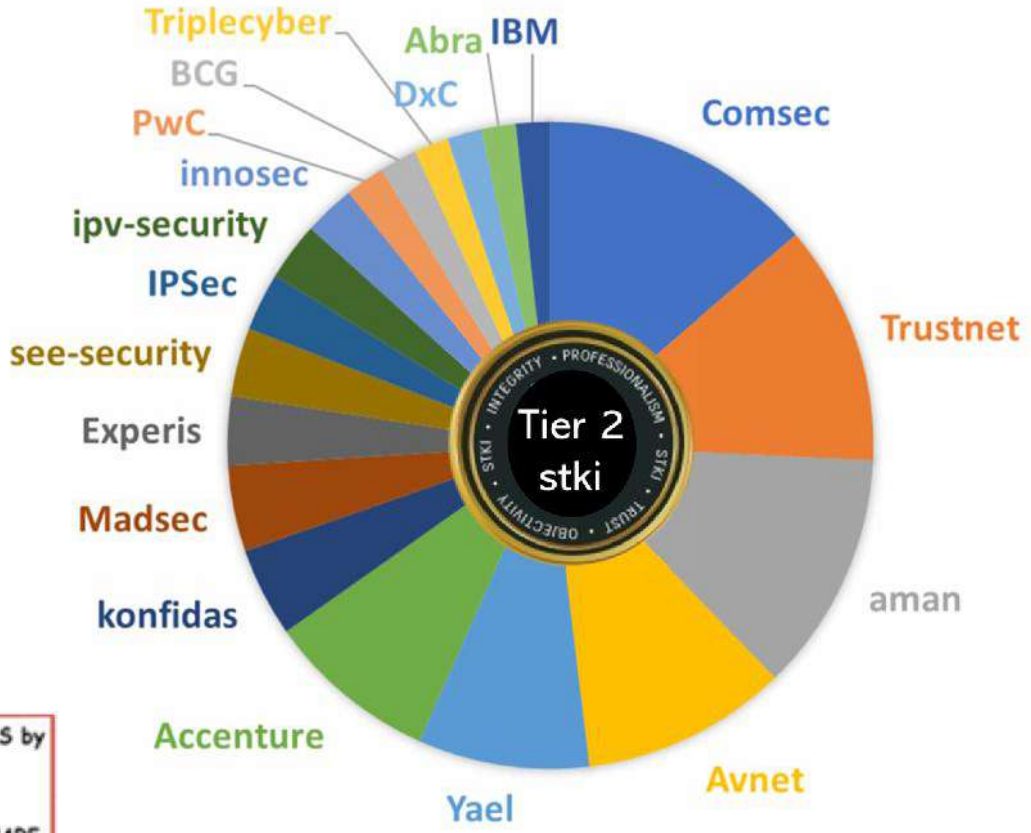

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Cyber Security Consulting

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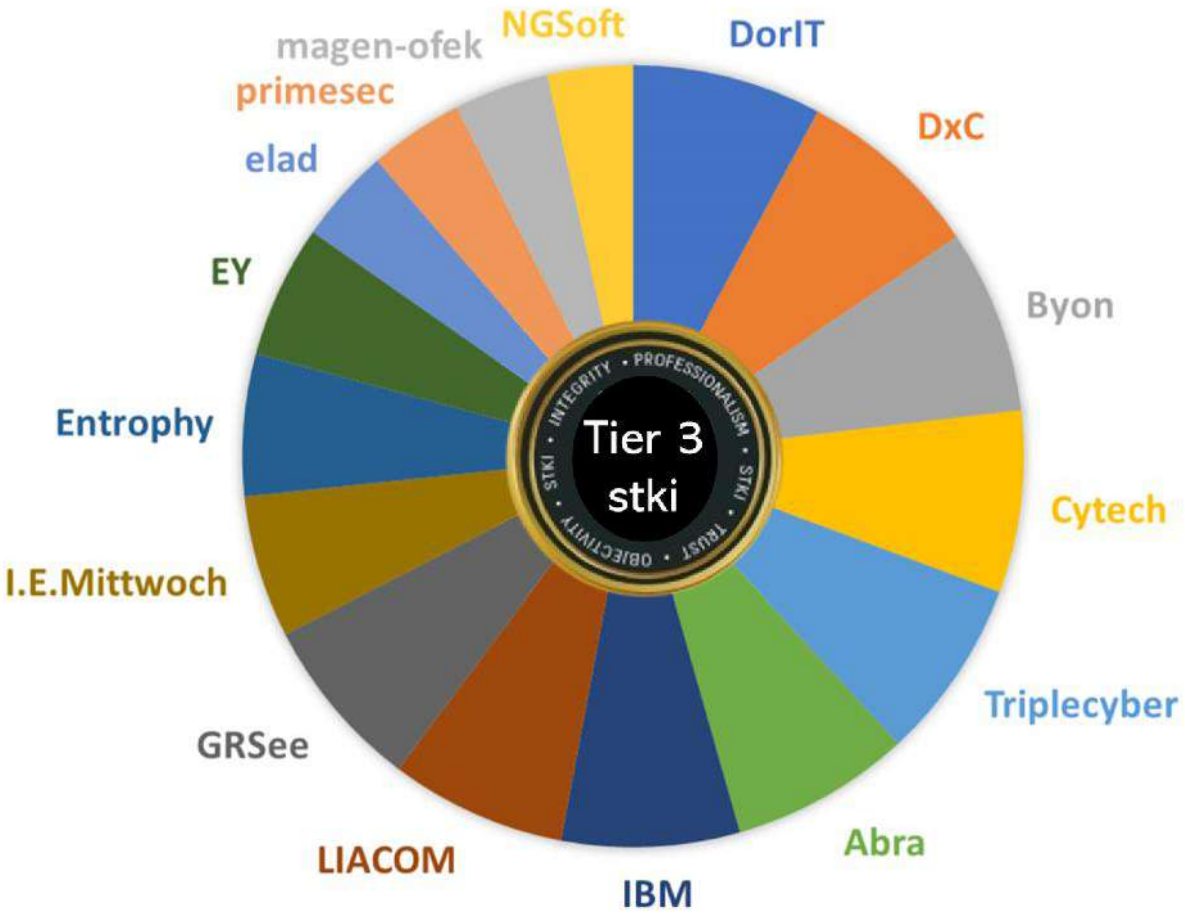

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3rd PARTY MAINTENANCE MARKET 2018-2022

	2018		2019		2020		2021		2022
Software Maintenance (3rd party)	$25.00	-8.00%	$23.00	-8.70%	$21.00	-4.76%	$20.00	15.00%	$23.00
Hardware Maintenance (3rd party)	$79.00	-1.27%	$78.00	-10.26%	$70.00	-2.86%	$68.00	2.94%	$70.00
TOTALS	$104.00	-2.88%	$101.00	-9.90%	$91.00	-3.30%	$88.00	5.68%	$93.00

Values in Million USD

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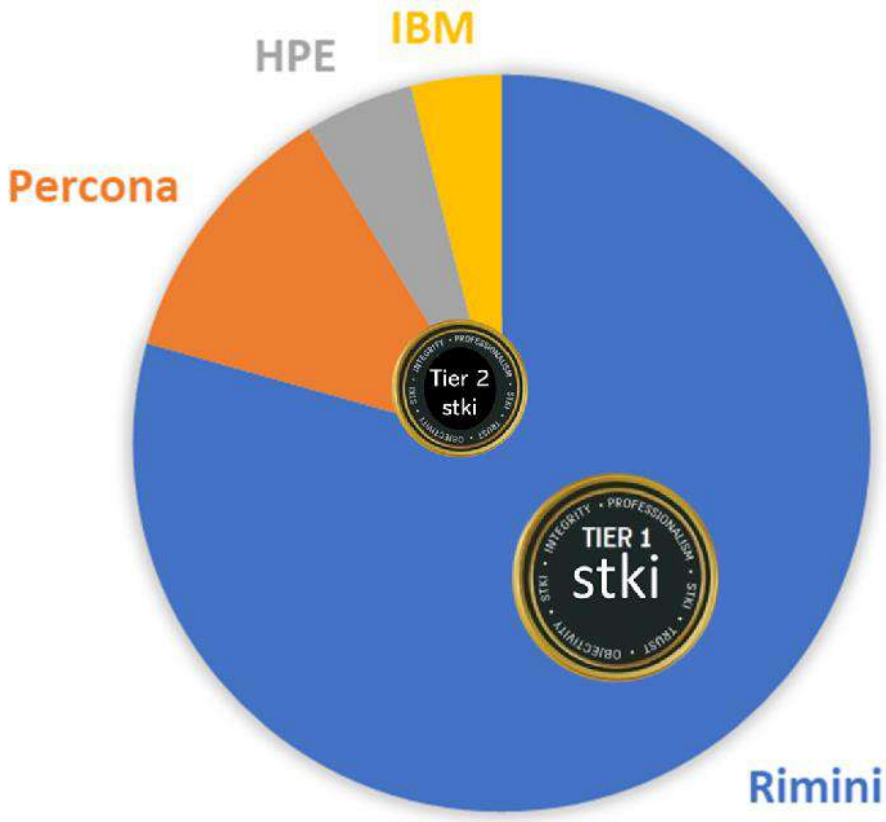
value added services market

Software Maintenance (3rd party) 230



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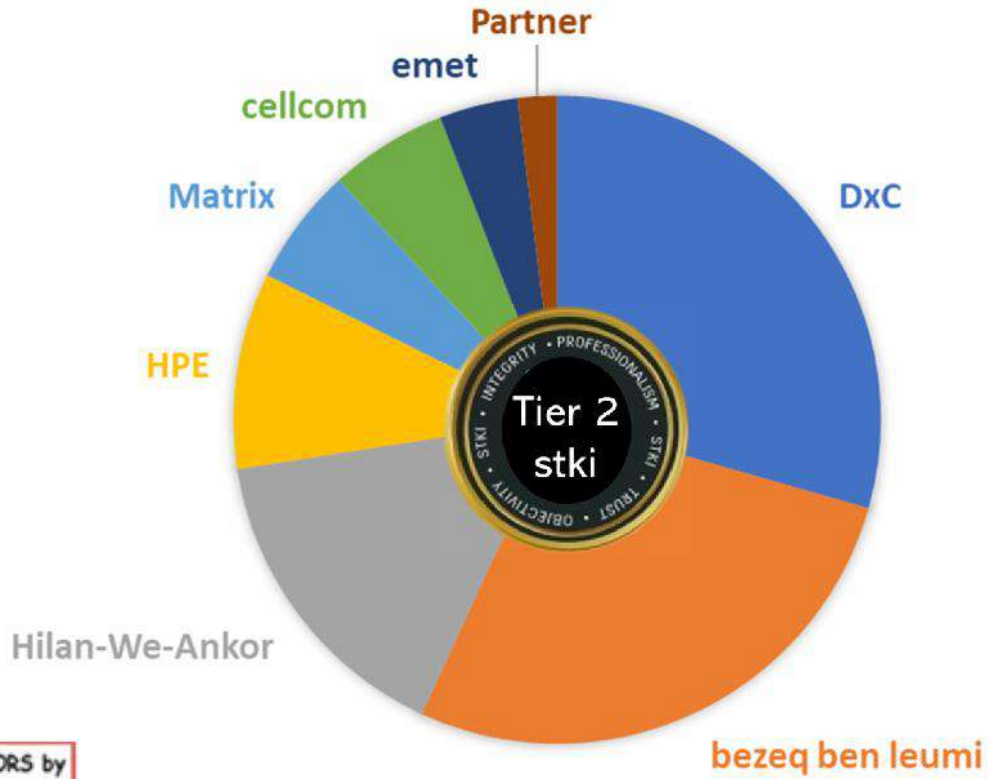
Hardware Maintenance (3rd party) 231



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INFRASTRUCTURE PROJECTS (on premise only) MARKET 2018-2022

	2018		2019		2020		2021		2022
Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects	$205.00	1.46%	$208.00	-6.25%	$195.00	4.62%	$204.00	1.96%	$208.00
DevOps and Infrastructure automation projects	$7.00	28.57%	$9.00	33.33%	$12.00	33.33%	$16.00	31.25%	$21.00
Software integration of middleware, SOA & BPM	$75.00	6.67%	$80.00	-25.00%	$60.00	25.00%	$75.00	6.67%	$80.00
Cyber security product implementations	$209.50	2.15%	$214.00	4.67%	$224.00	4.46%	$234.00	5.98%	$248.00
Unified Communication Projects (IM, Video, Voice)	$10.00	25.00%	$12.50	100.00%	$25.00	20.00%	$30.00	33.33%	$40.00
TOTALS	$506.50	3.36%	$523.50	-1.43%	$516.00	8.33%	$559.00	6.80%	$597.00

Values in Million USD

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Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects

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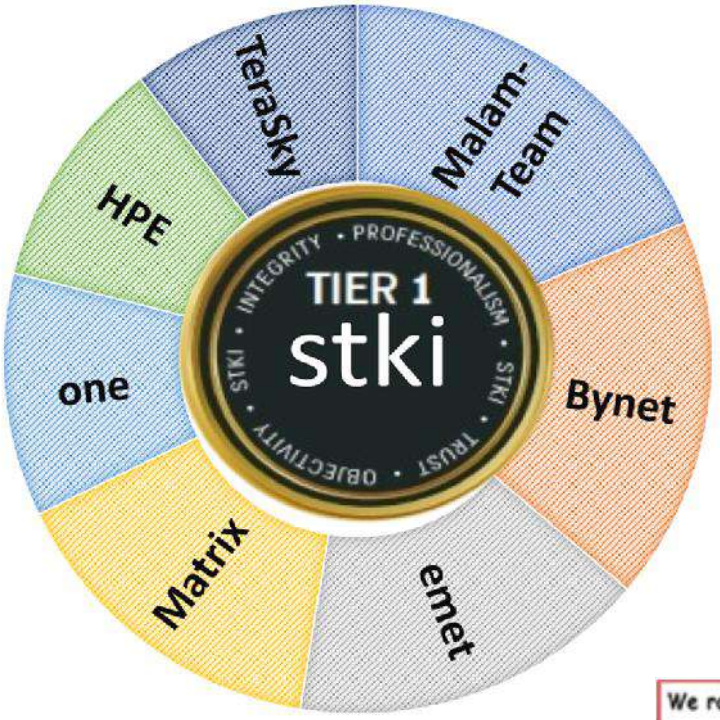
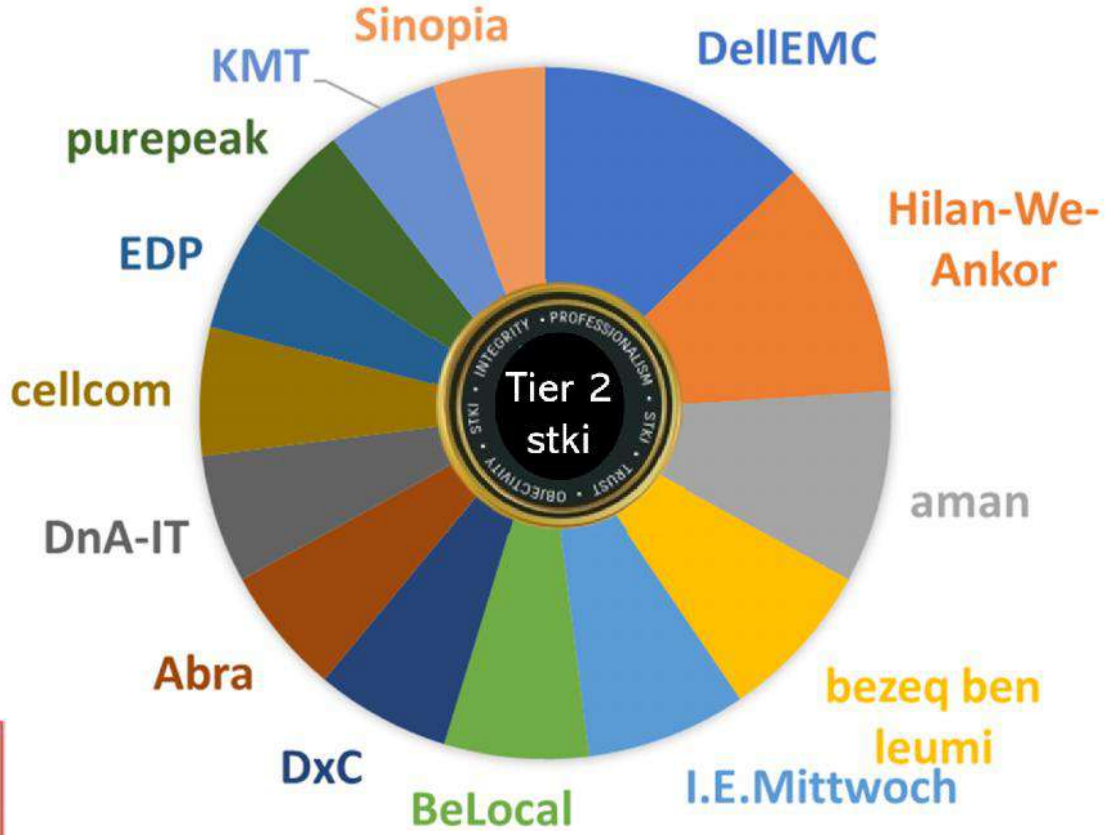
value added services market





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value added services market

Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects

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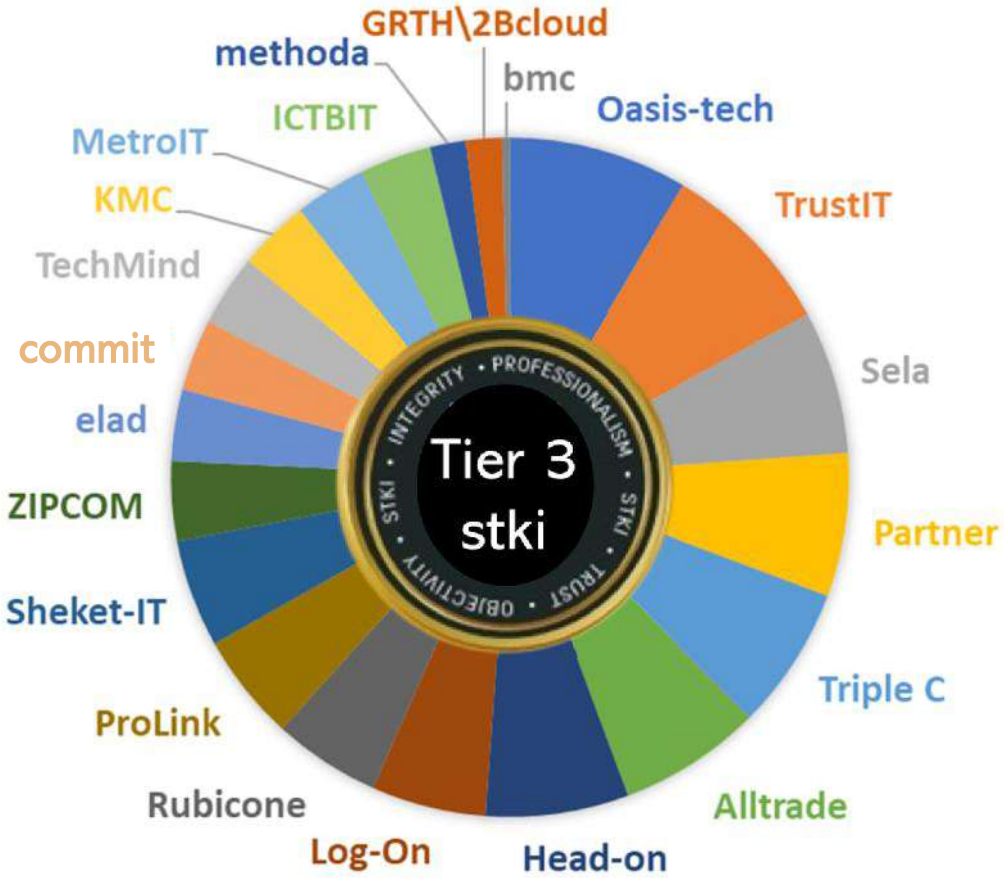

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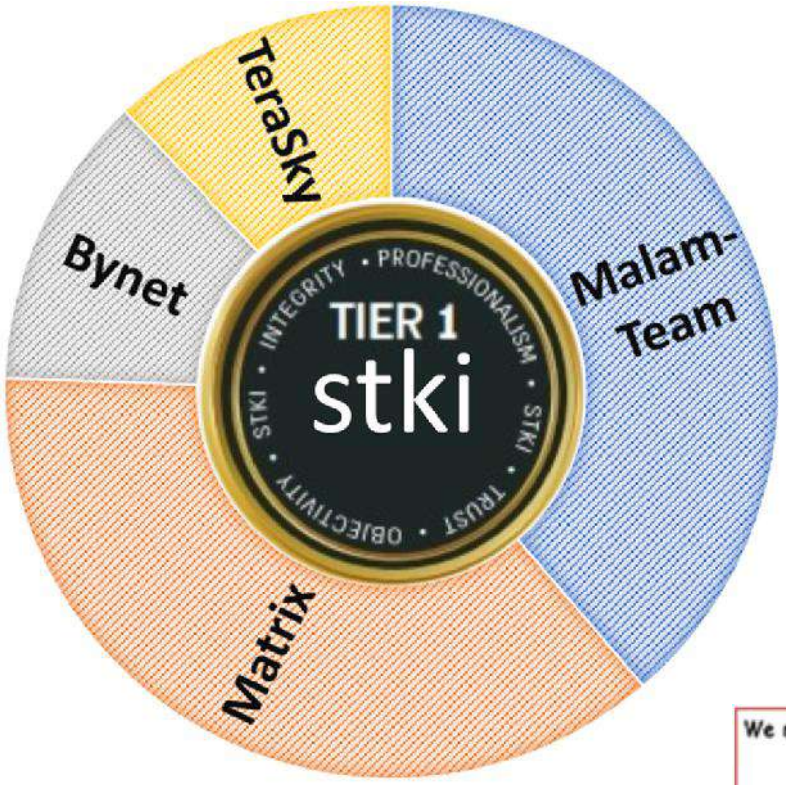
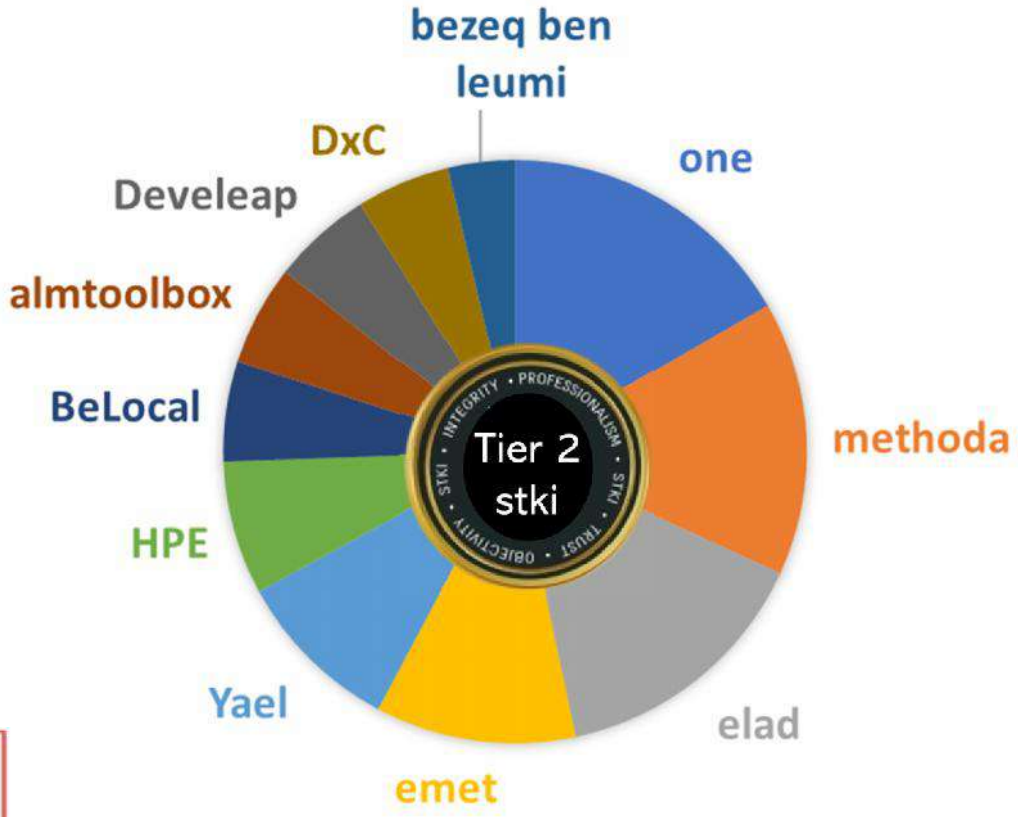
value added services market

DevOps & Infrastructure Automation Projects 235





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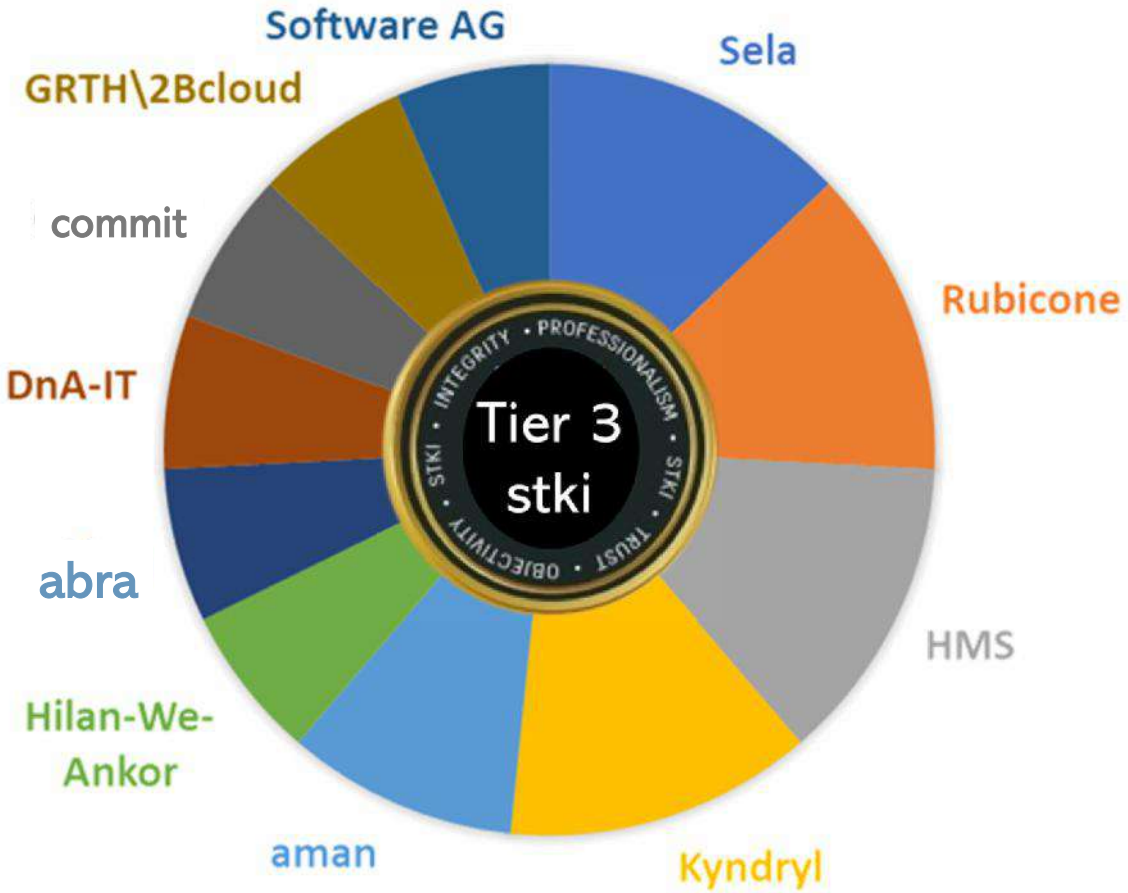
DevOps & Infrastructure Automation Projects 236



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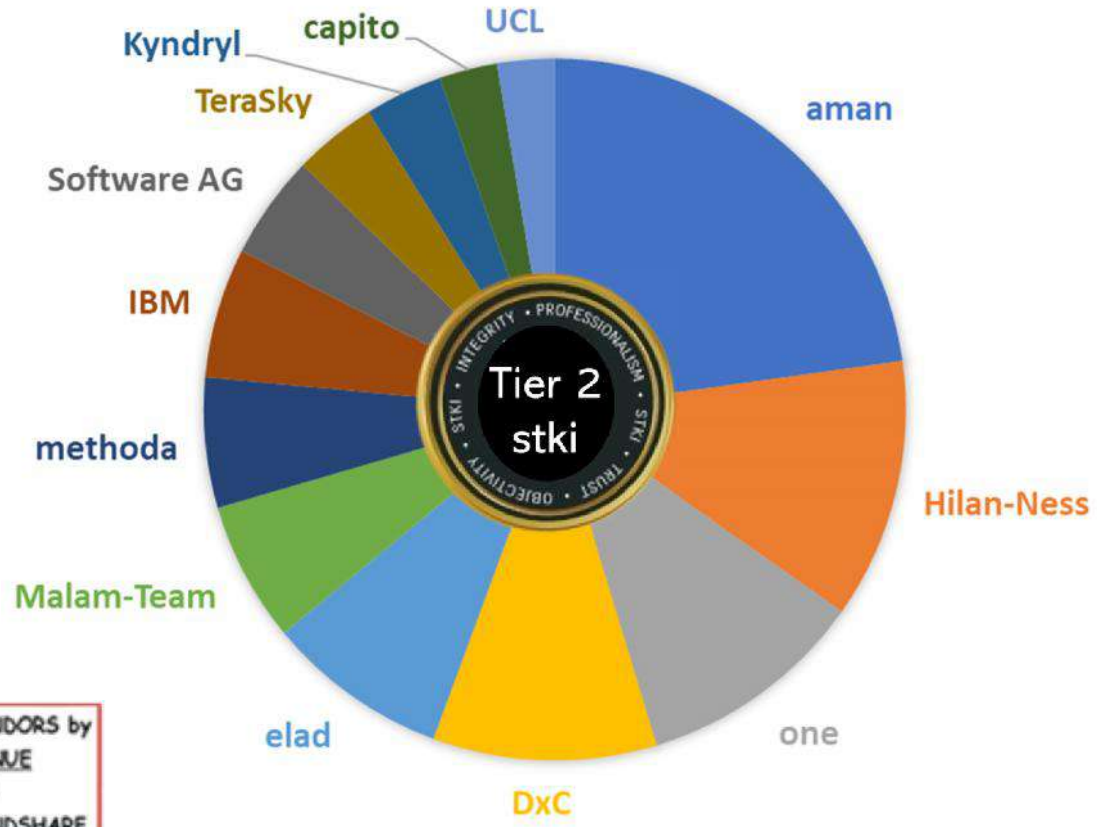
Software Integration of Middleware, SOA & BPM 237



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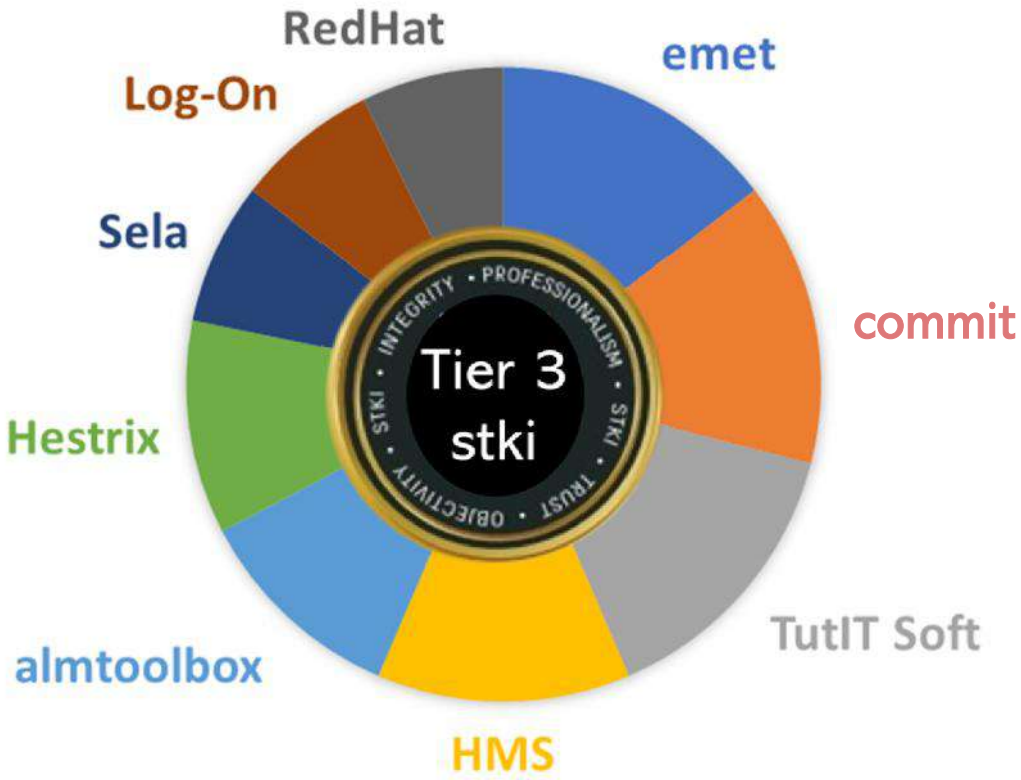
Software Integration of Middleware, SOA & BPM 238



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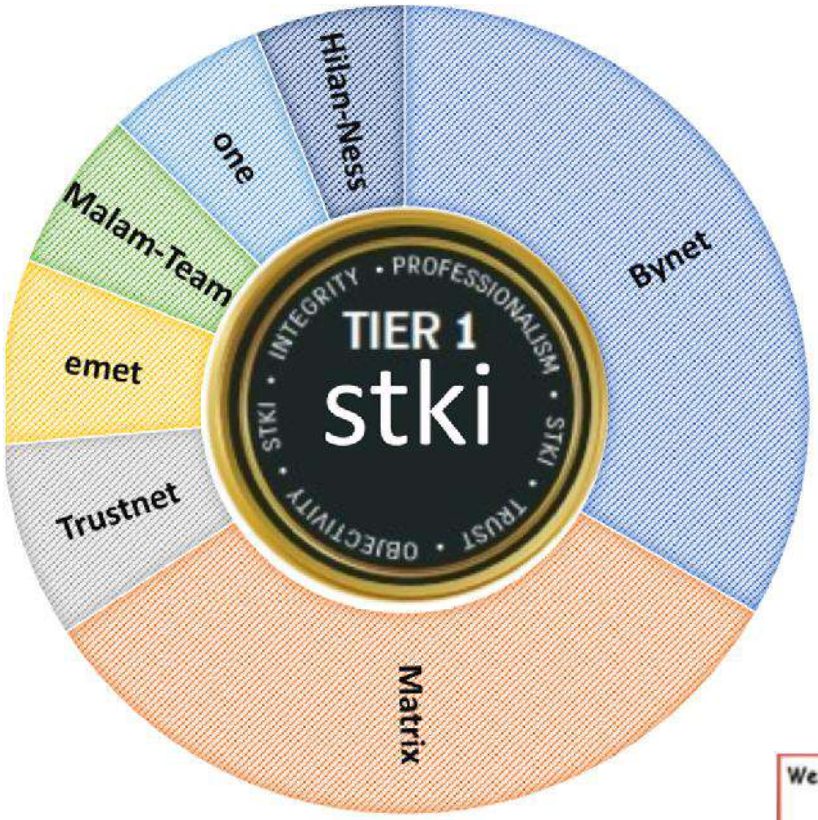
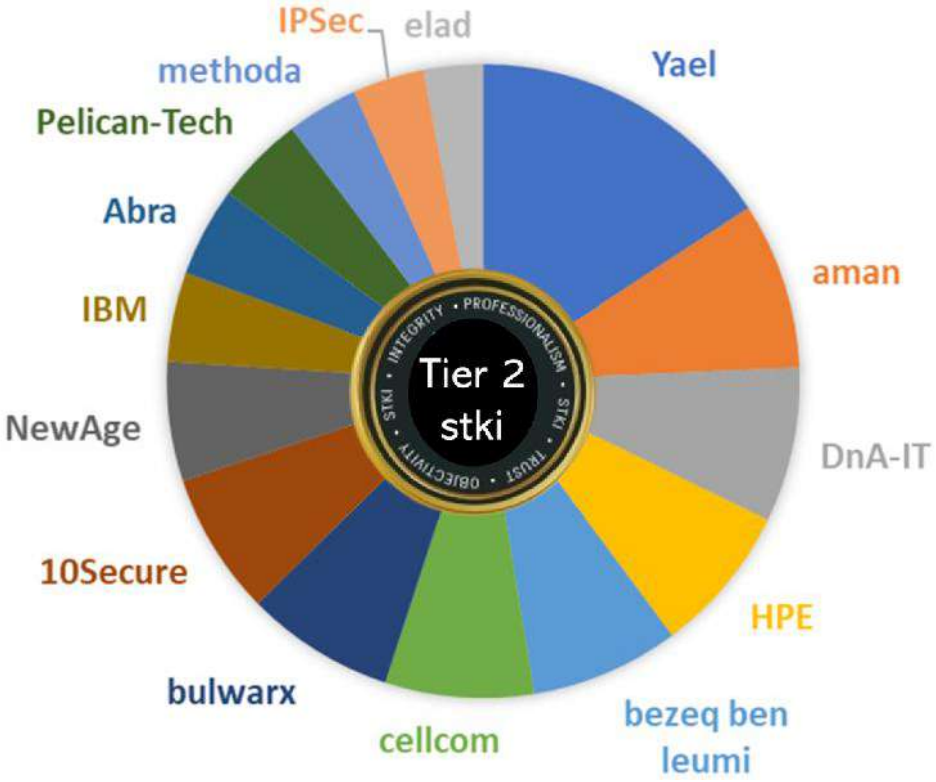
value added services market

Cyber Security Product Implementations 239





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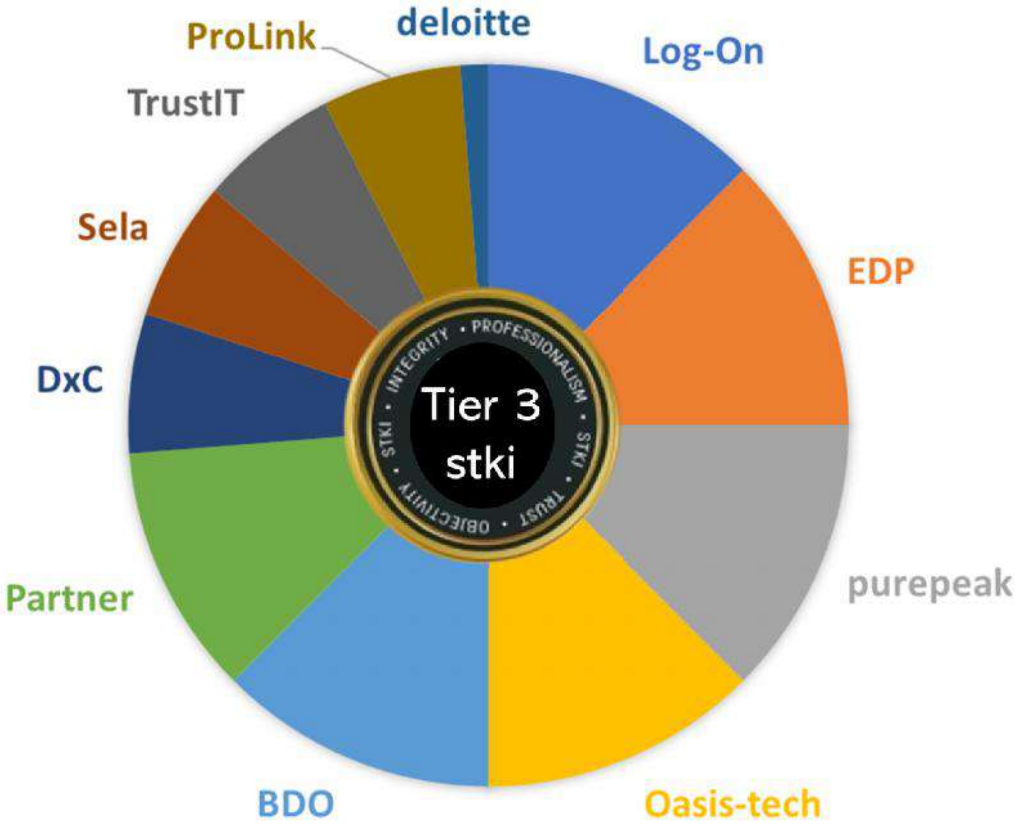
Cyber Security Product Implementations 240



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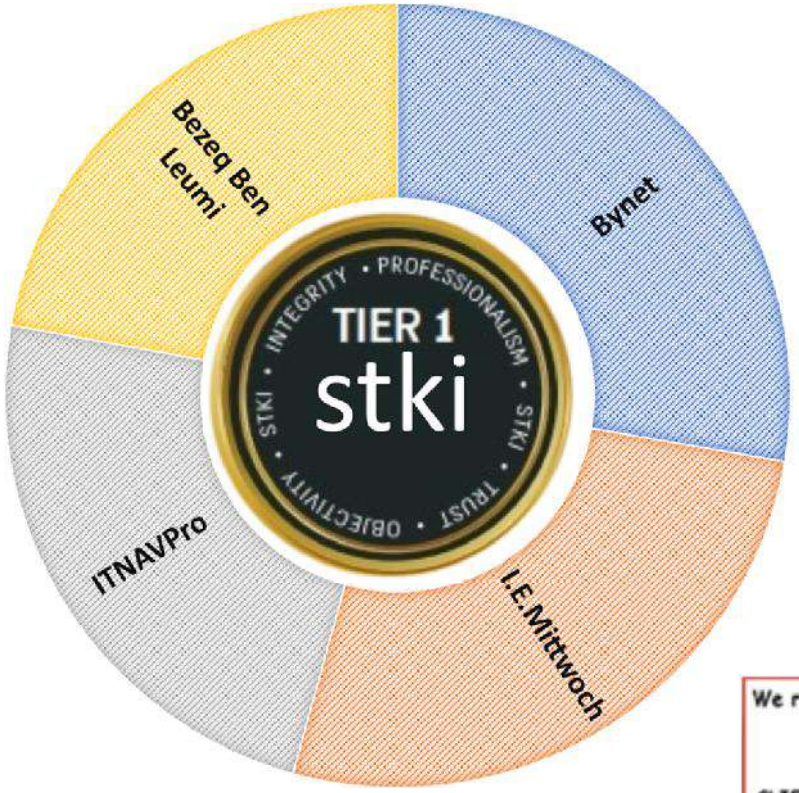
value added services market

Unified Communication Projects (IM, Video, Voice) 241



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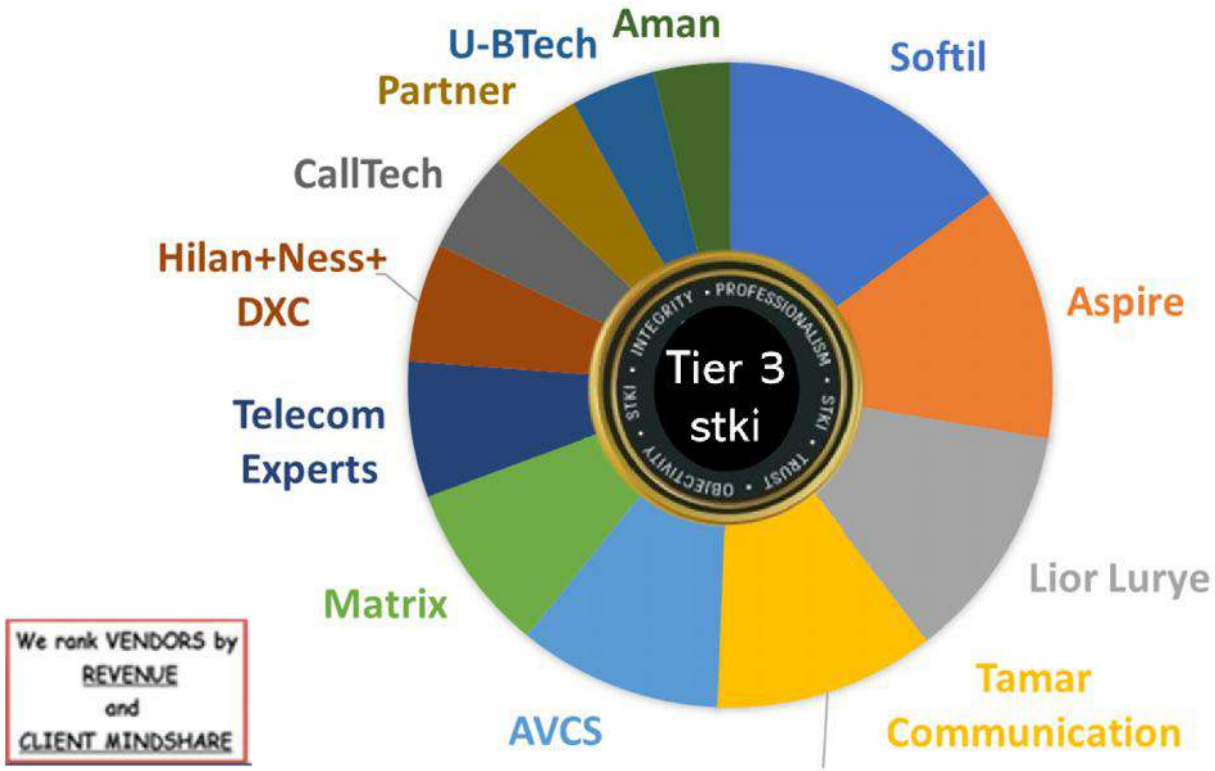
value added services market

Unified Communication Projects (IM, Video, Voice) 242



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CLOUD INFRASTRUCTURE PROJECTS MARKET 2018-2022

	2018		2019		2020		2021		2022
Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects	$2.00	300.00%	$8.00	50.00%	$12.00	108.33%	$25.00	60.00%	$40.00
Devops and Infrastructure automation projects	$1.50	100.00%	$3.00	166.67%	$8.00	62.50%	$13.00	53.85%	$20.00
Software integration,of middleware, SOA & BPM	$5.00	60.00%	$8.00	50.00%	$12.00	50.00%	$18.00	33.33%	$24.00
Cyber security product implementation	$5.00	200.00%	$15.00	20.00%	$18.00	33.33%	$24.00	33.33%	$32.00
Unified Communication Projects (IM, Video, Voice)	$2.00	400.00%	$10.00	250.00%	$35.00	42.86%	$50.00	20.00%	$60.00
TOTALS	$15.50	183.87%	$44.00	93.18%	$85.00	52.94%	$130.00	35.38%	$176.00

Values in Million USD

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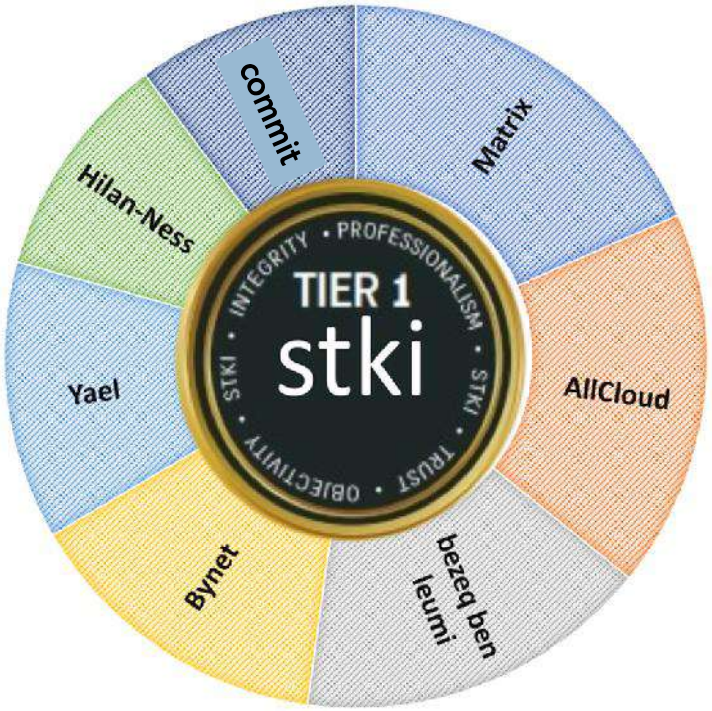
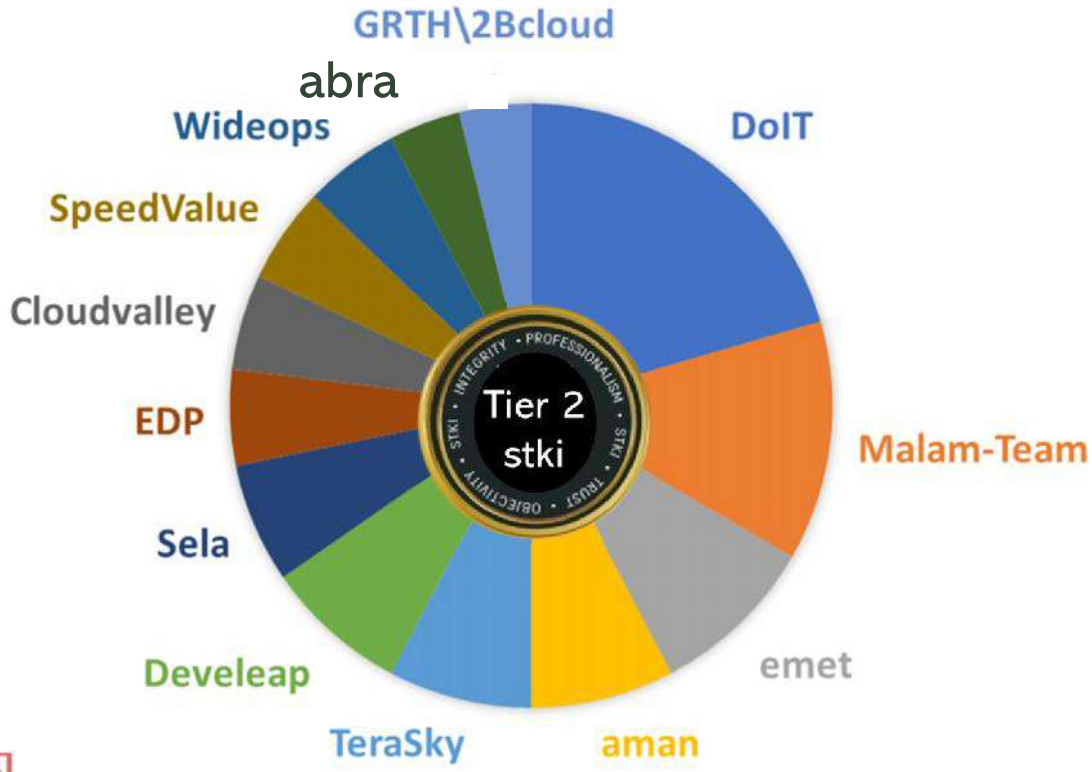
value added services market

CLOUD: Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects





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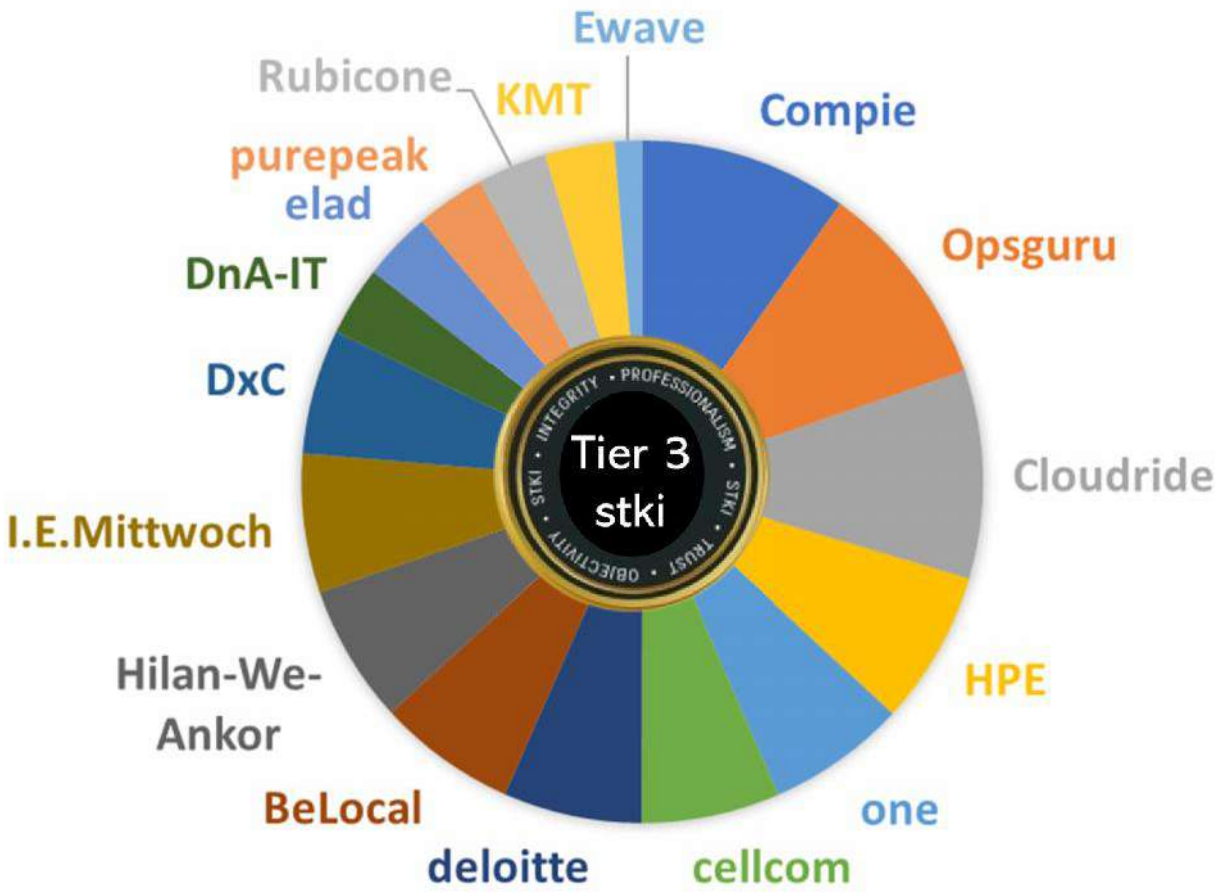
CLOUD: Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects



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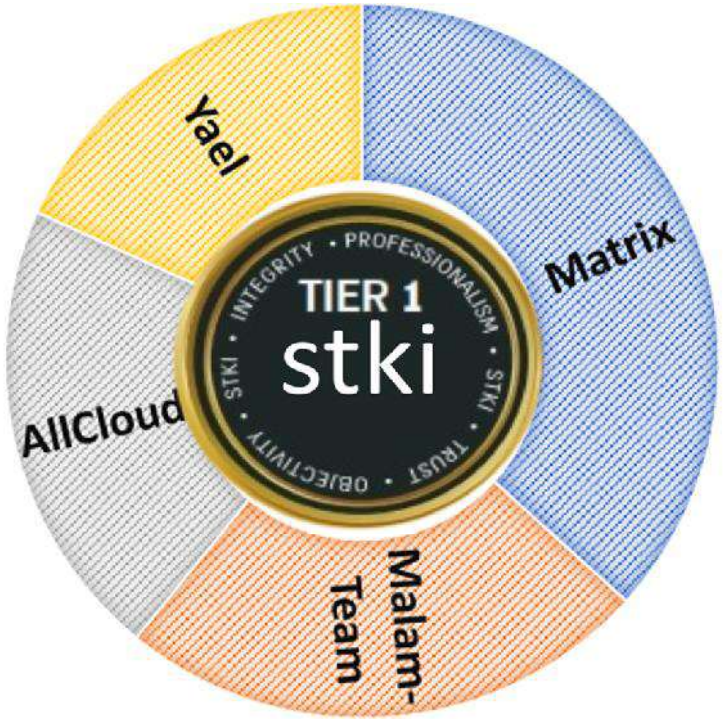
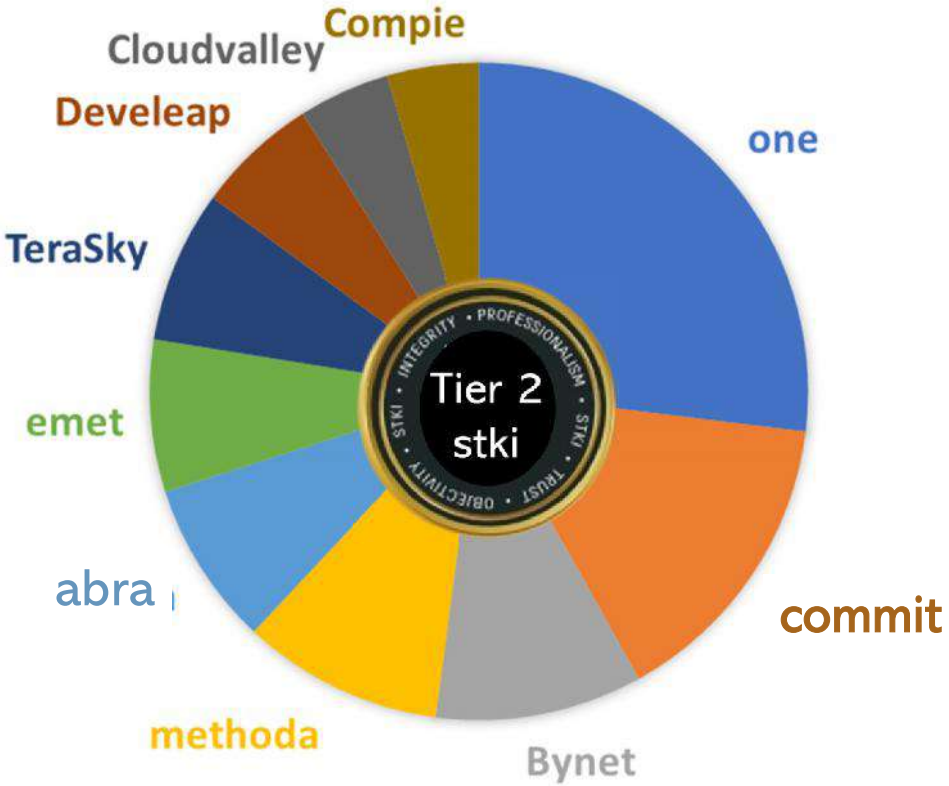
DevOps & Infrastructure Automation (Cloud) Projects 246





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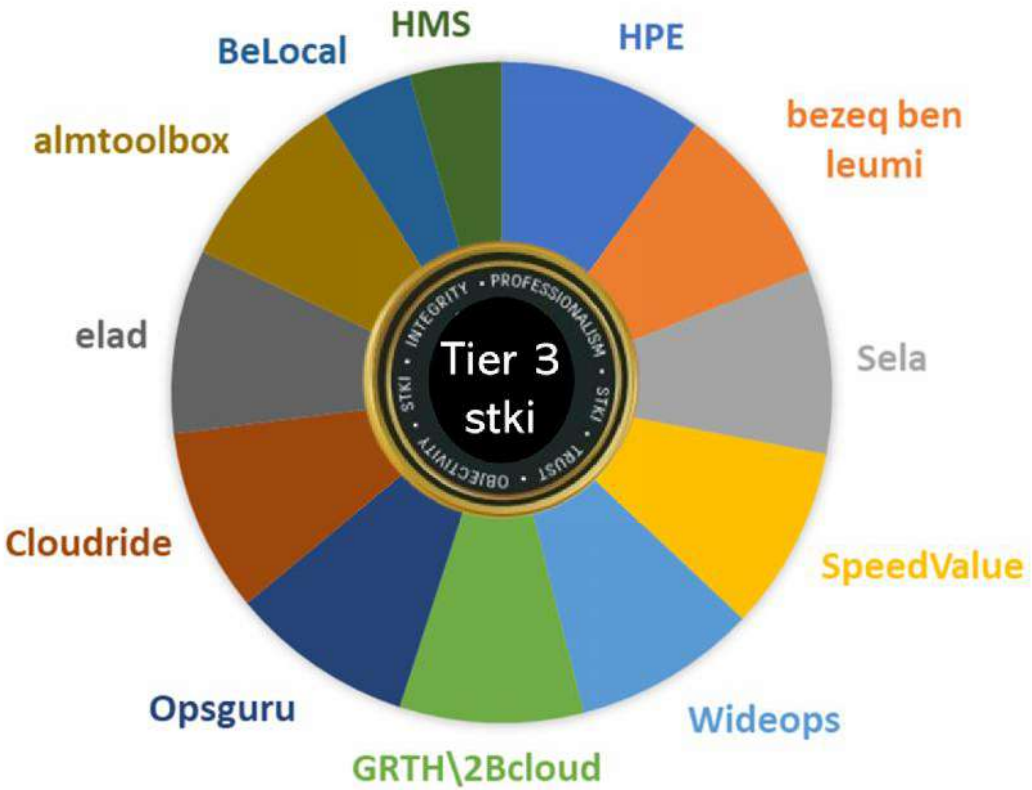

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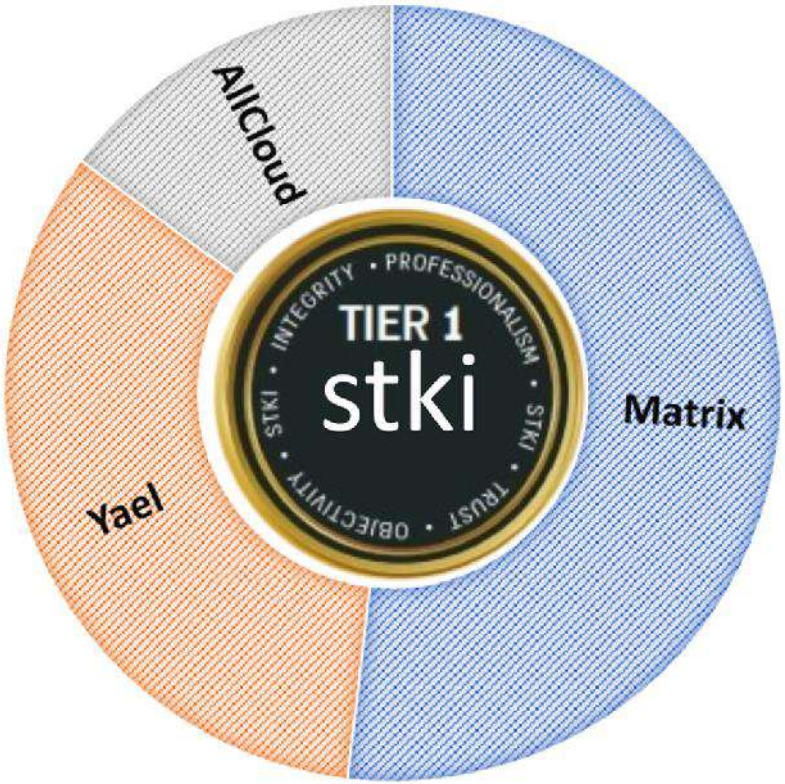
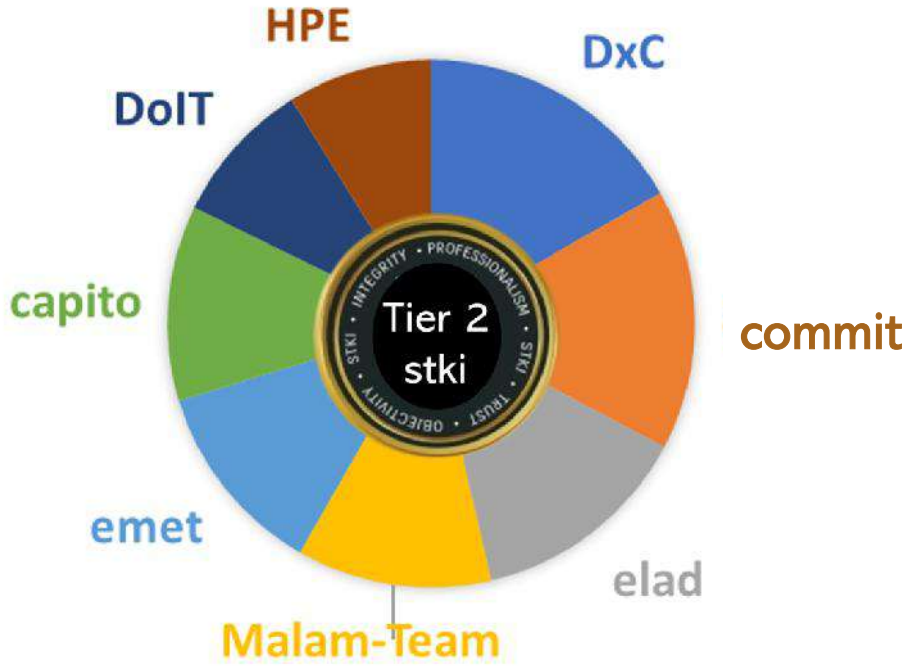
Software Integration of Cloud Middleware, SOA & BPM 248





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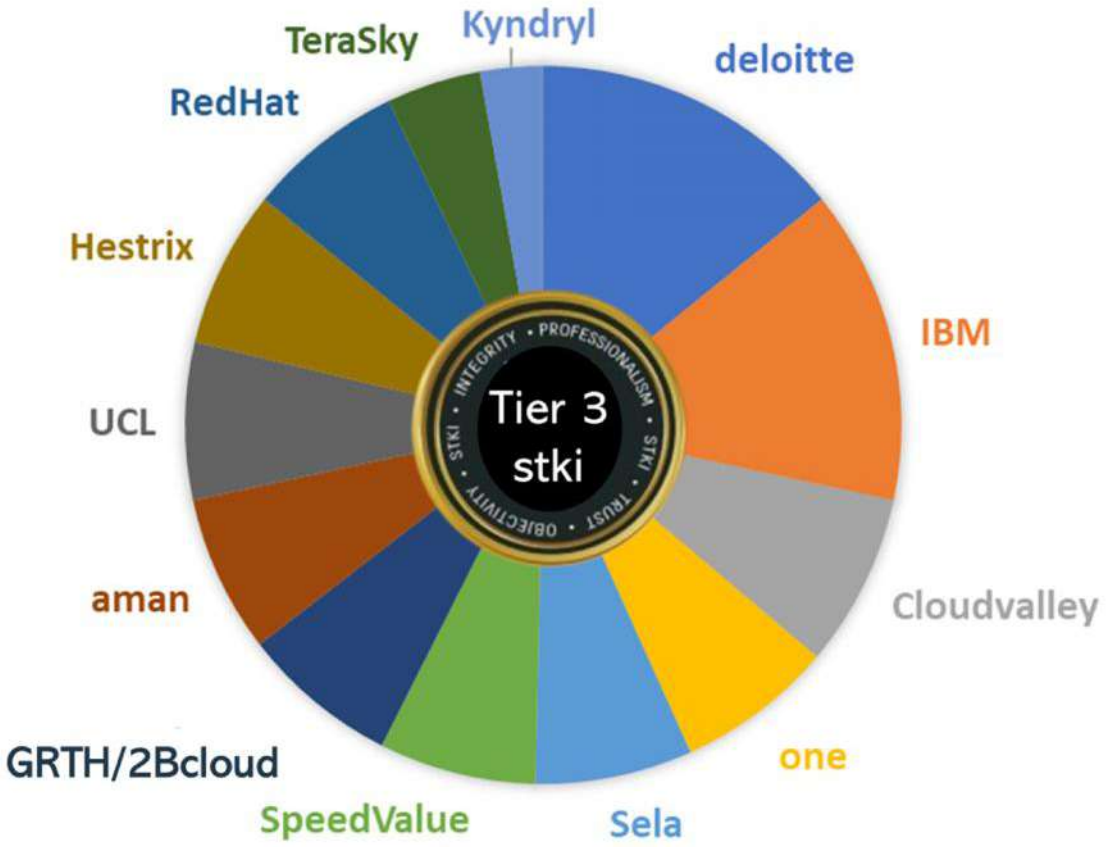
Software Integration of Cloud Middleware, SOA & BPM 249



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Cyber Security Cloud Product Implementation 250

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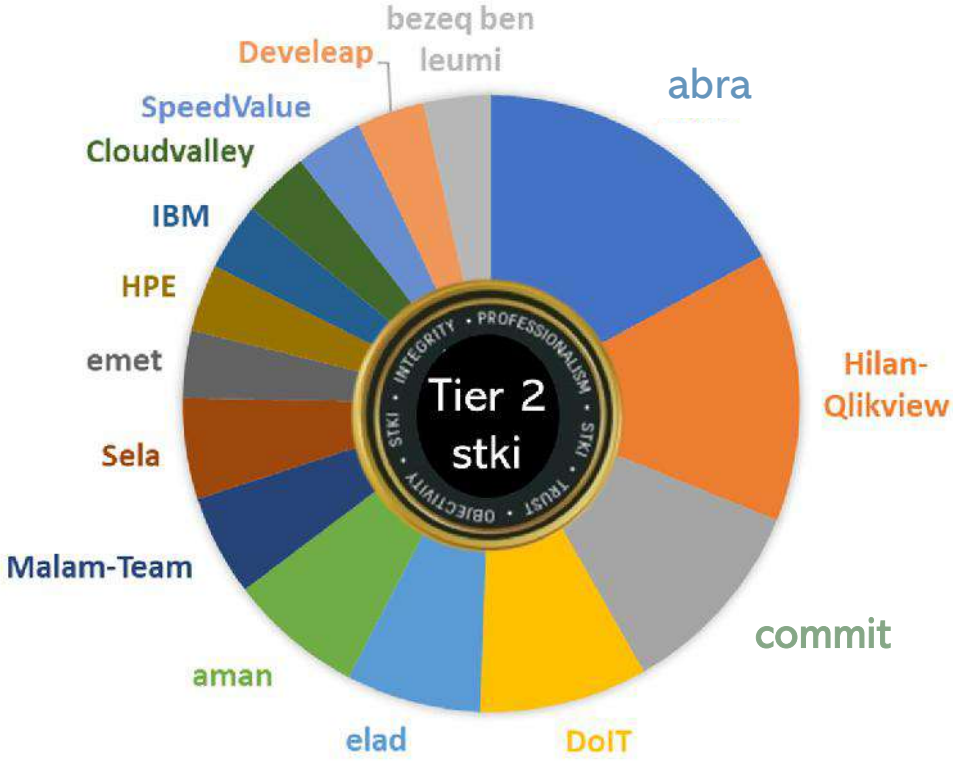

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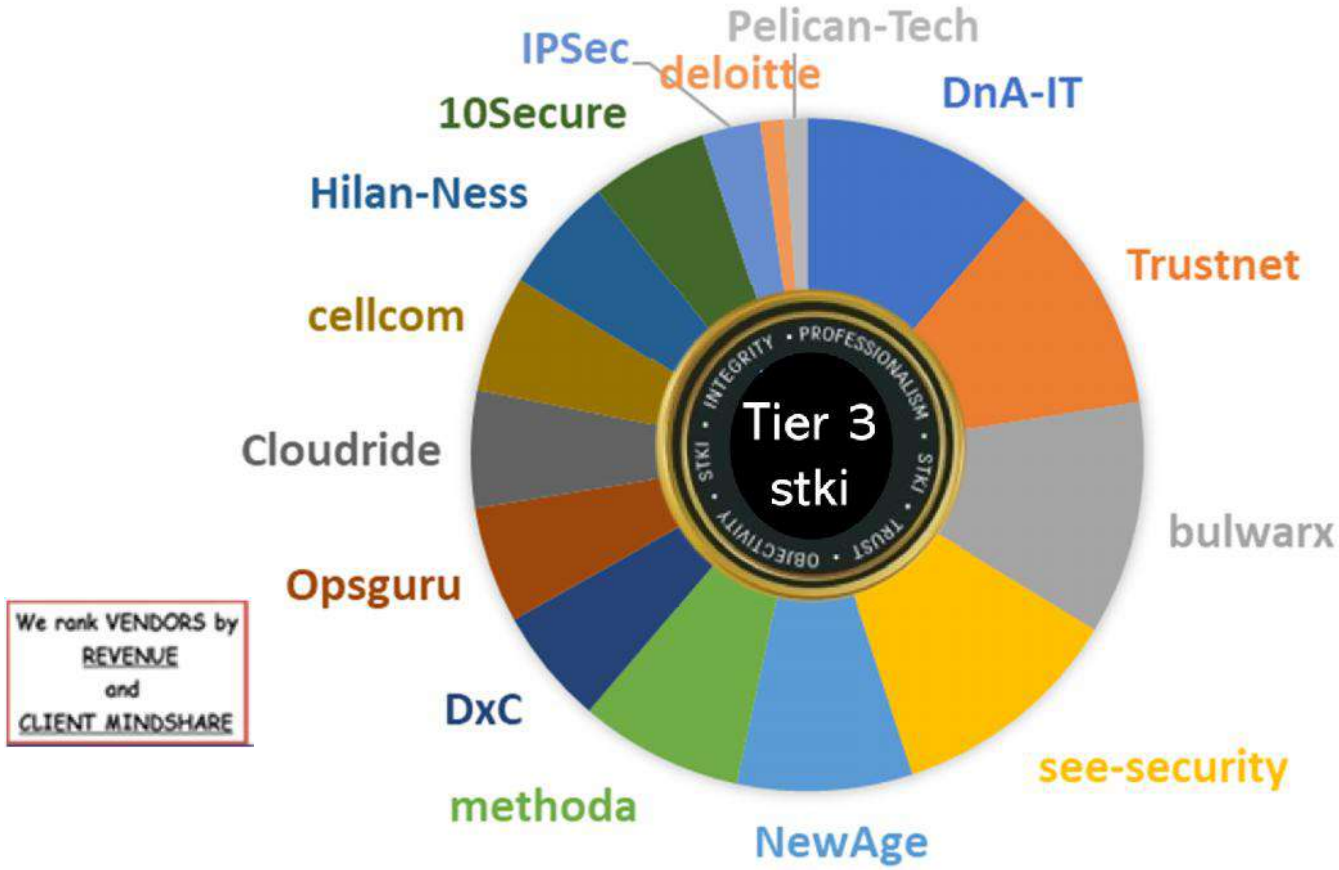
Cyber Security Cloud Product Implementation 251



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value added services market

Unified Communication “cloud” Projects

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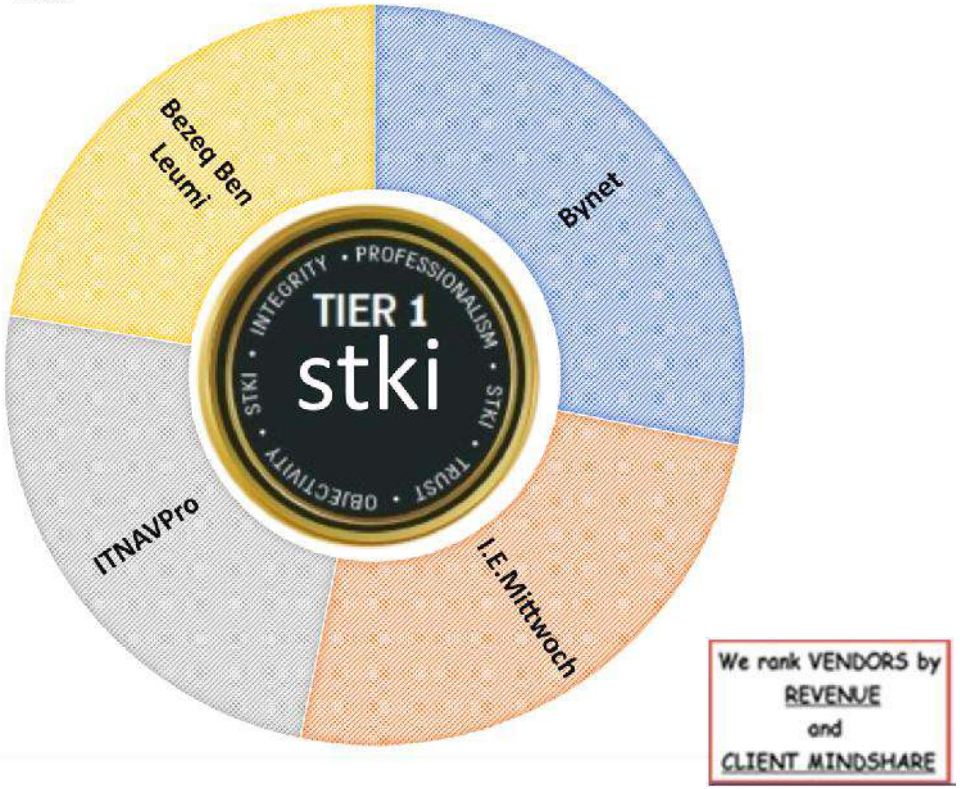

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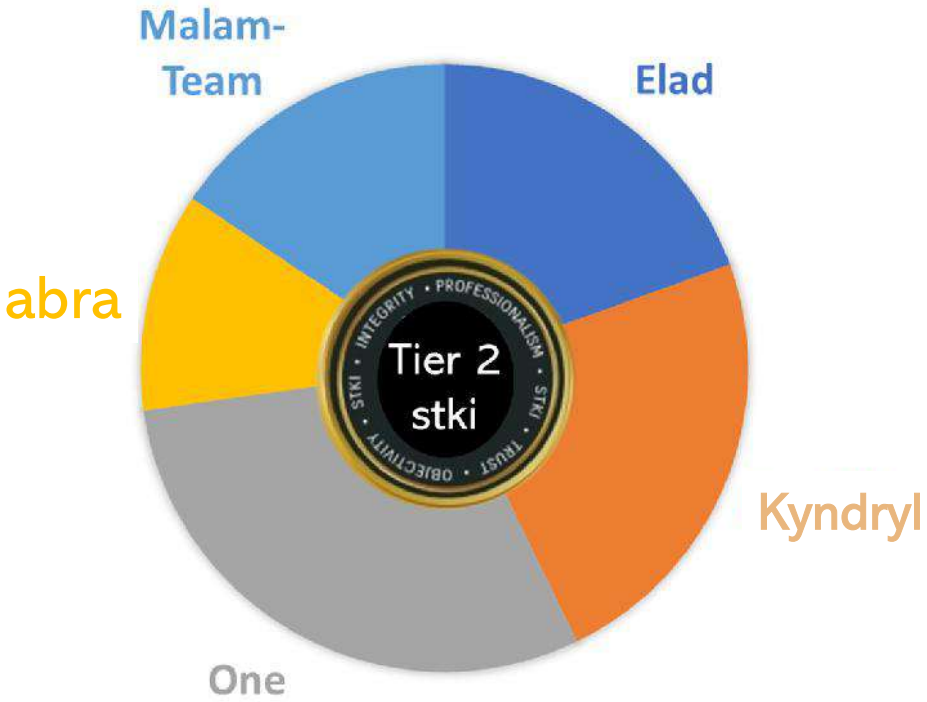

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IMPLEMENTATION OF PROJECT MANAGEMENT & DEVELOPMENT TOOLS MARKET 2018-2022

	2018		2019		2020		2021		2022
PPM & Project management	$35.00	54.29%	$54.00	-53.70%	$25.00	44.00%	$36.00	38.89%	$50.00
ALM & Development & Testing tools implementation	$58.00	29.31%	$75.00	-40.00%	$45.00	15.56%	$52.00	30.77%	$68.00
Low Code tool implementation	$0.00		$2.00	200.00%	$6.00	100.00%	$12.00	33.33%	$16.00
TOTALS	$93.00	40.86%	$131.00	-41.98%	$76.00	31.58%	$100.00	34.00%	$134.00

Values in Million USD

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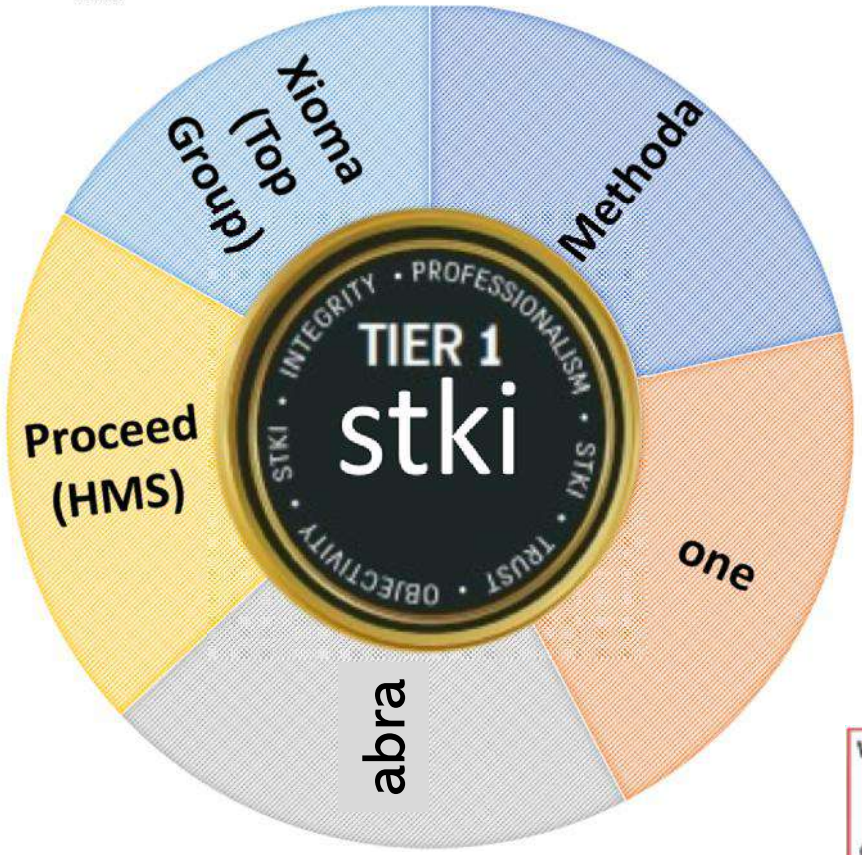
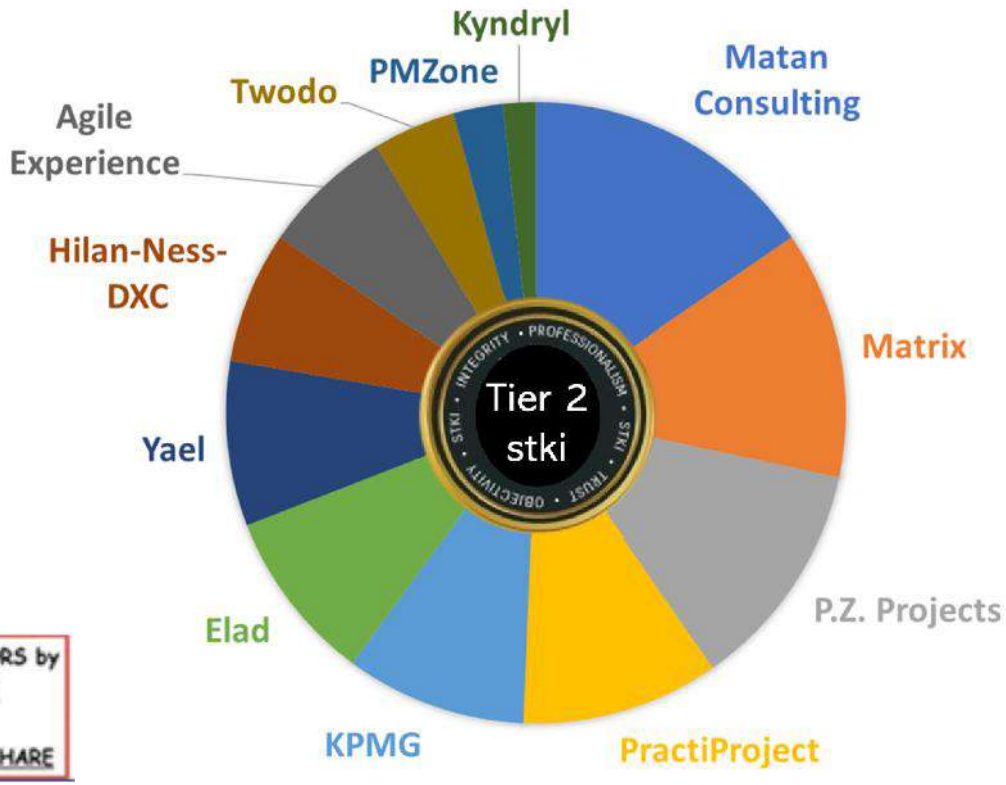
PPM & Project Management Implementation 254





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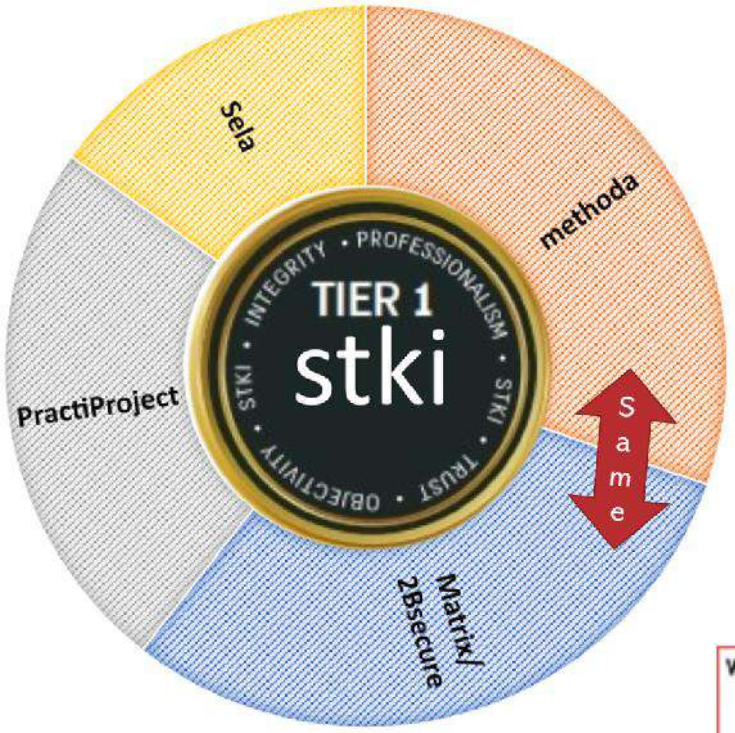
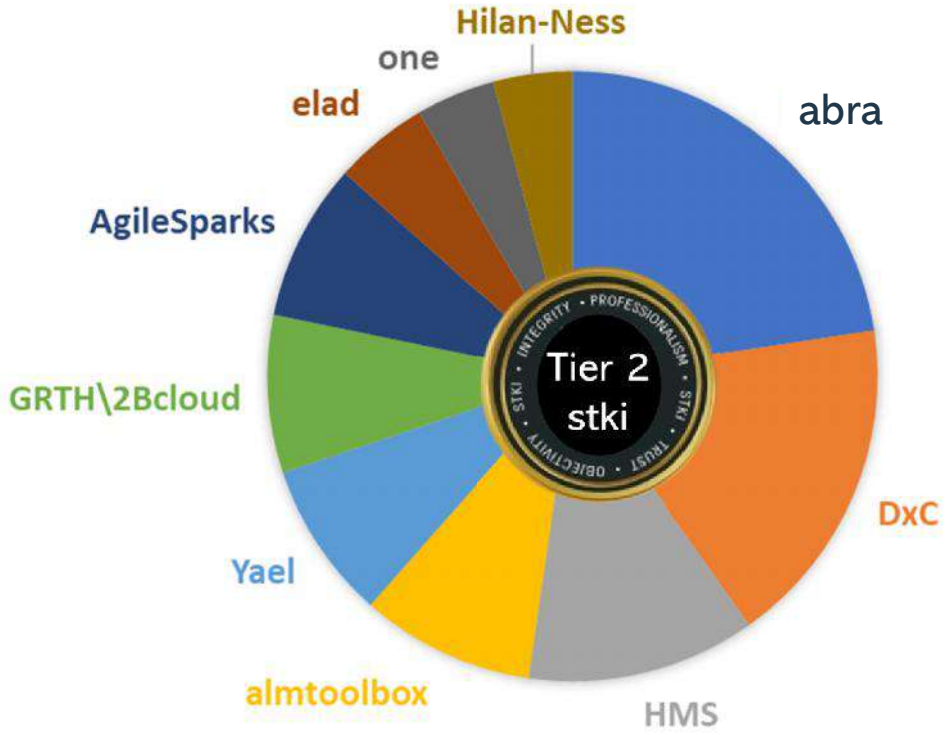
ALM & Development & Testing Tools Implementation 255





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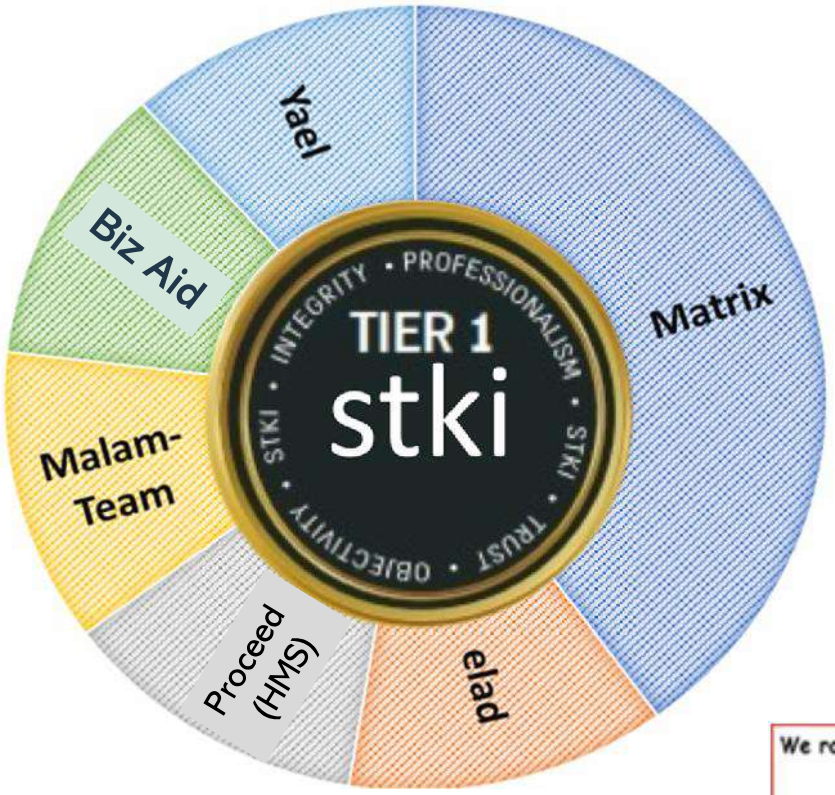
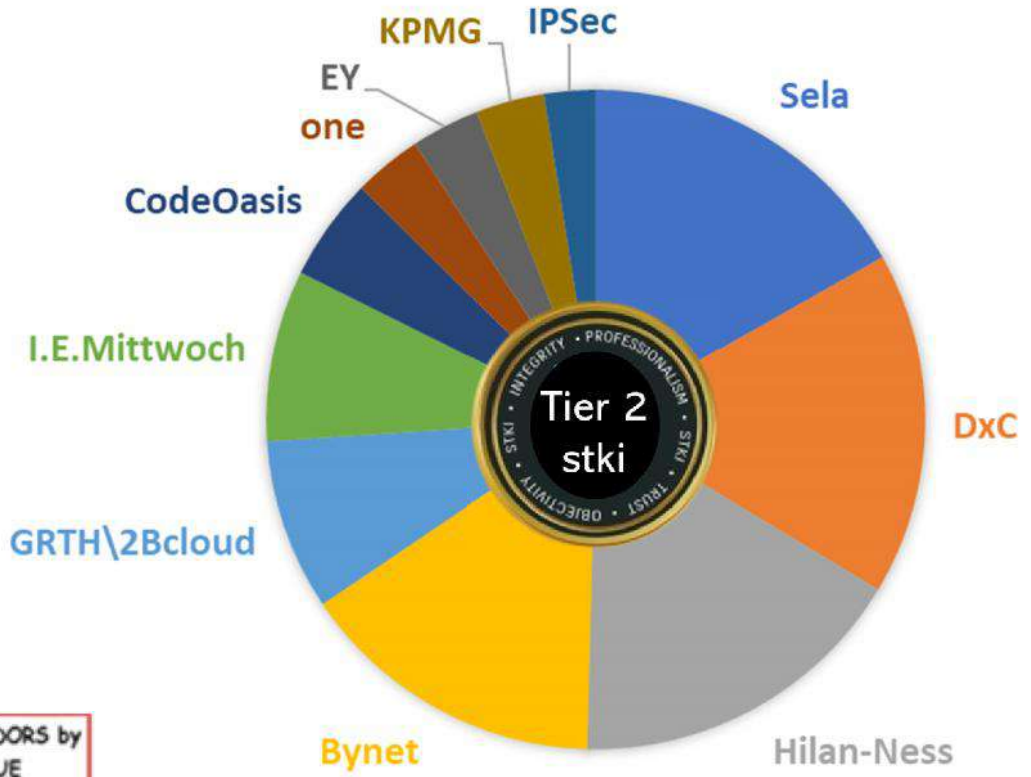
Low Code Tool Implementation

256





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ENTERPRISE SOFTWARE IMPLEMENTATIONS MARKET 2018-2022

257

	2018		2019		2020		2021		2022
ERP Implementations	$138.00	15.94%	$160.00	-25.00%	$120.00	13.33%	$136.00	19.12%	$162.00
HR & Talent Mngt & Payroll Implementations	$28.00	14.29%	$32.00	-21.88%	$25.00	20.00%	$30.00	40.00%	$42.00
CRM Implementations	$188.00	3.72%	$195.00	-25.64%	$145.00	17.24%	$170.00	10.59%	$188.00
ITSM Implementation	$20.00	25.00%	$25.00	-20.00%	$20.00	15.00%	$23.00	8.70%	$25.00
E-Commerce and Marketplace Implementations	$40.00	15.00%	$46.00	17.39%	$54.00	11.11%	$60.00	20.00%	$72.00
Marketing Automation Implementations	$28.00	14.29%	$32.00	6.25%	$34.00	17.65%	$40.00	12.50%	$45.00
TOTALS	$442.00	10.86%	$490.00	-18.78%	$398.00	15.33%	$459.00	16.34%	$534.00

Values in Million USD

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ERP Implementations 258

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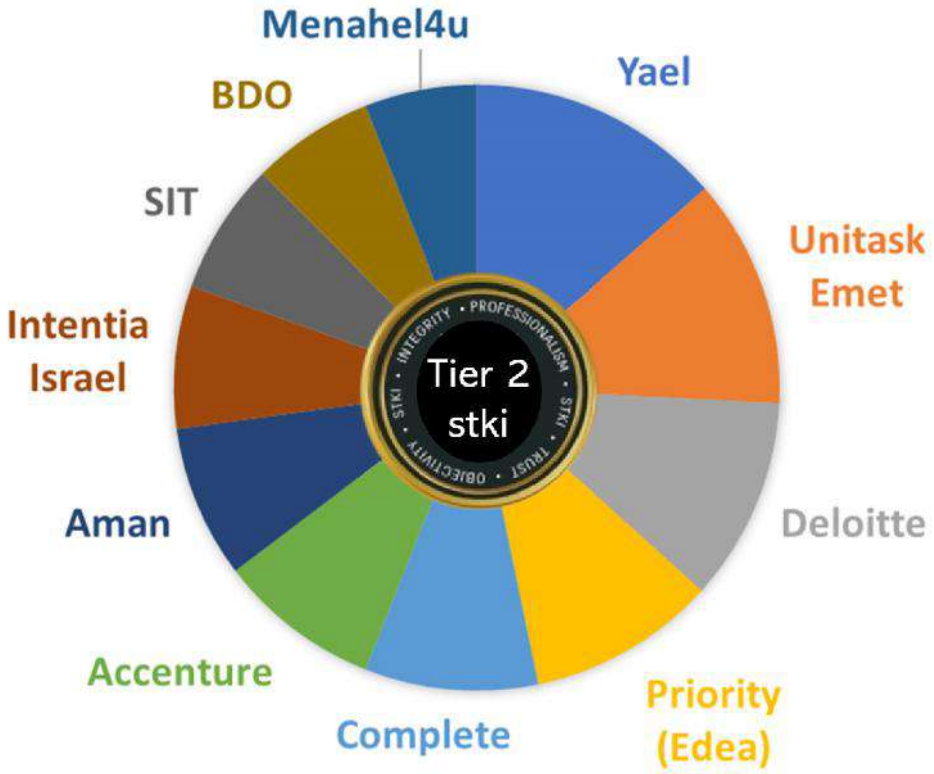

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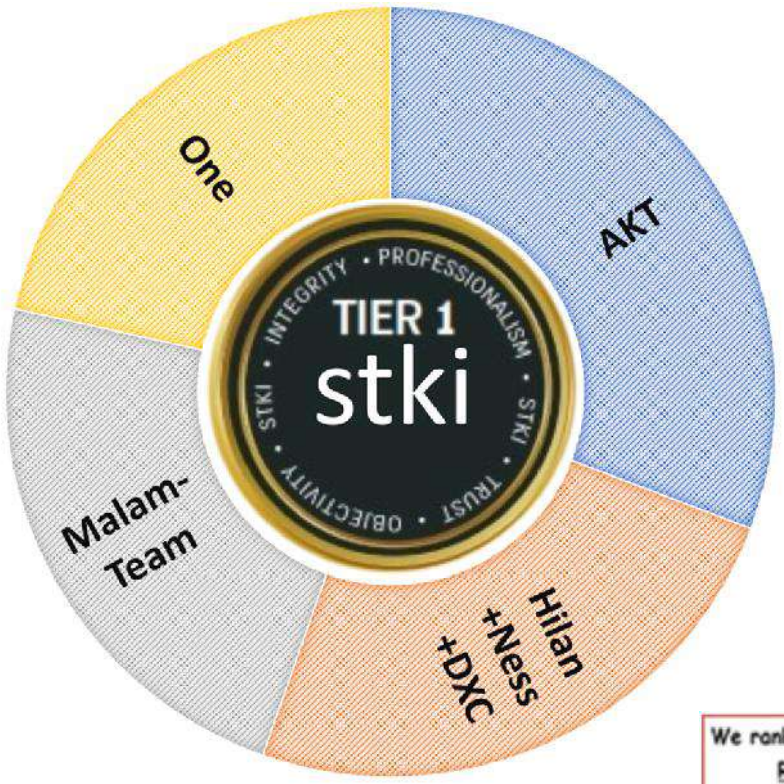
HR & Talent Mngt & Payroll Implementations 259



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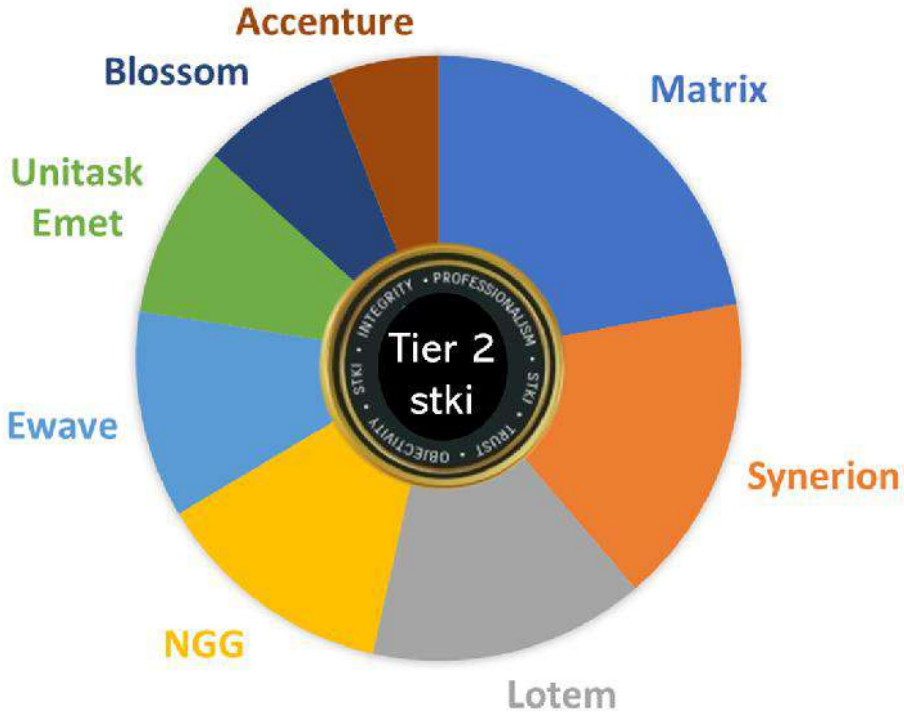

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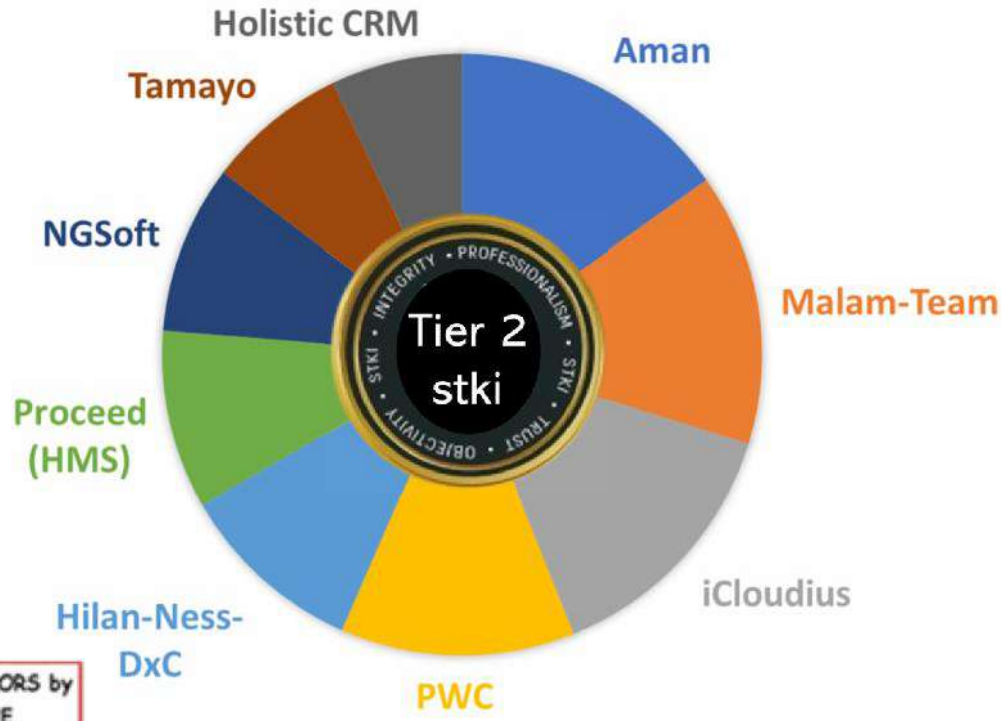
CRM Implementations

260



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ITSM Implementation

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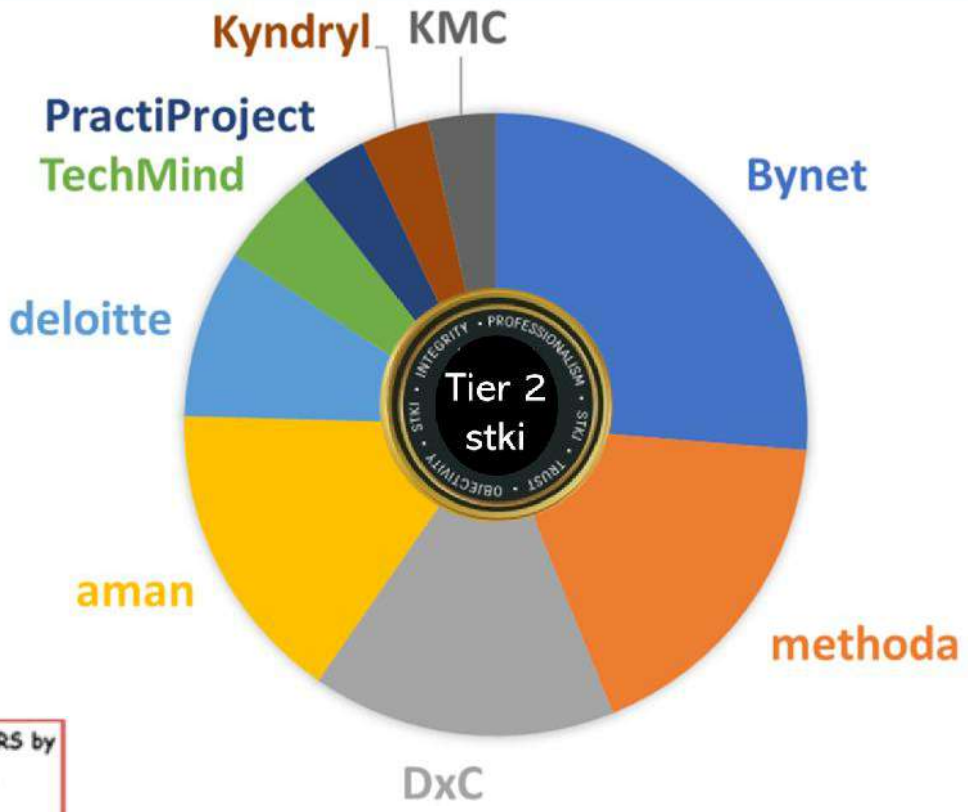

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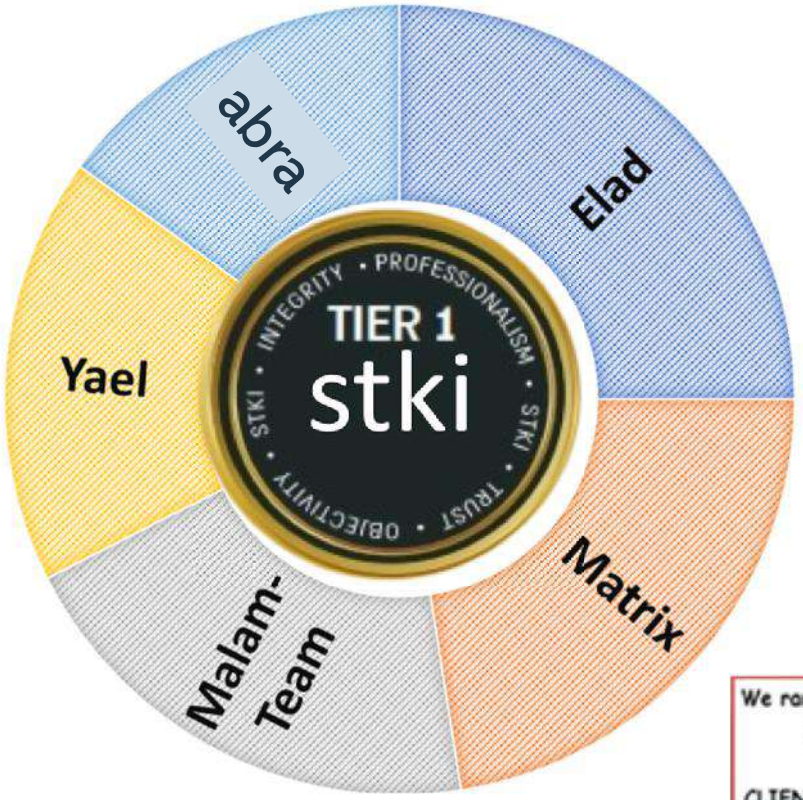
E-Commerce and Marketplace Implementations 262



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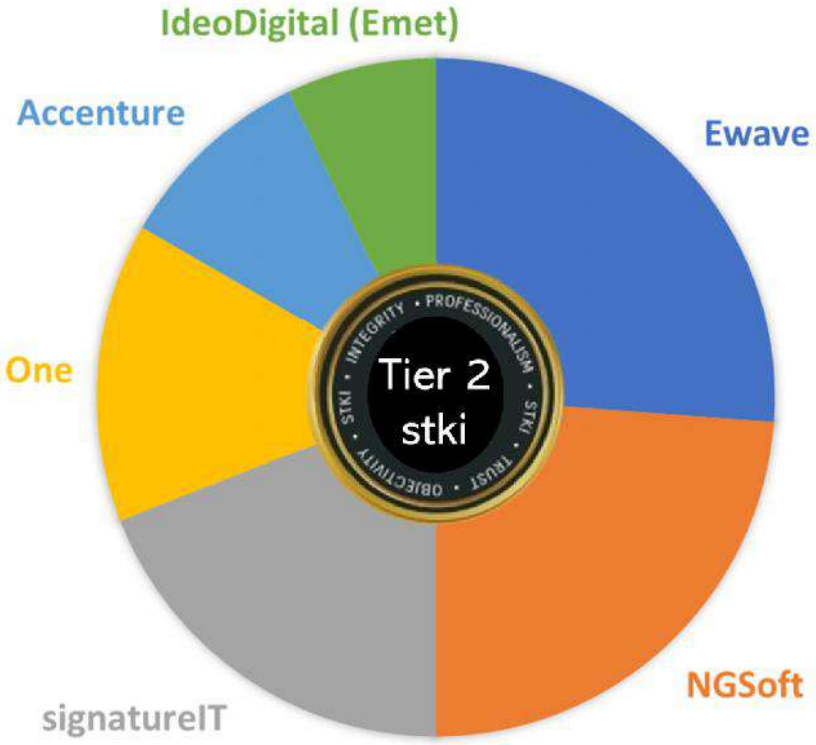

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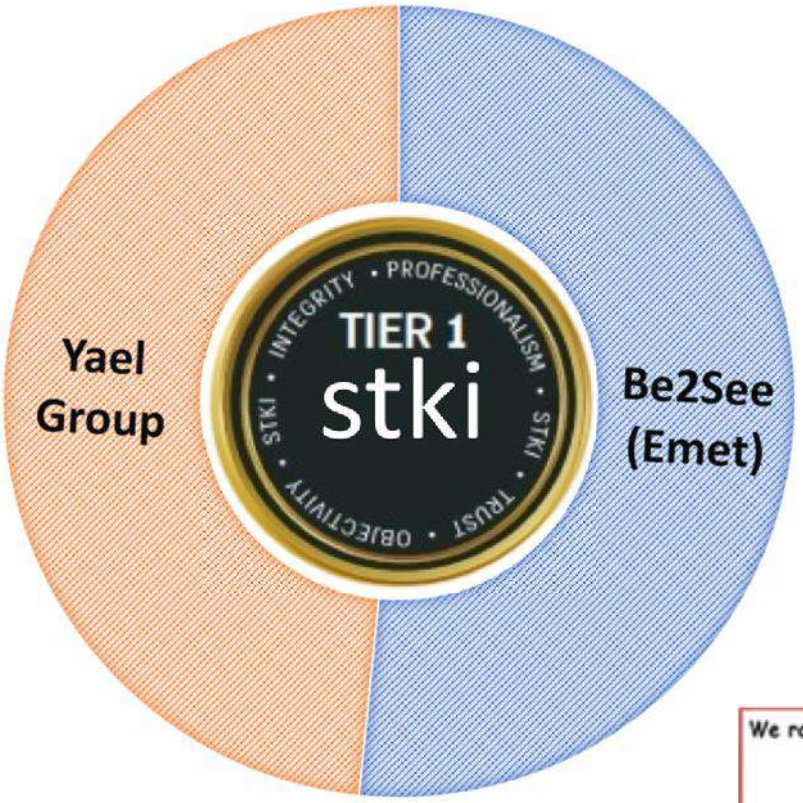
Marketing Automation Implementations 263



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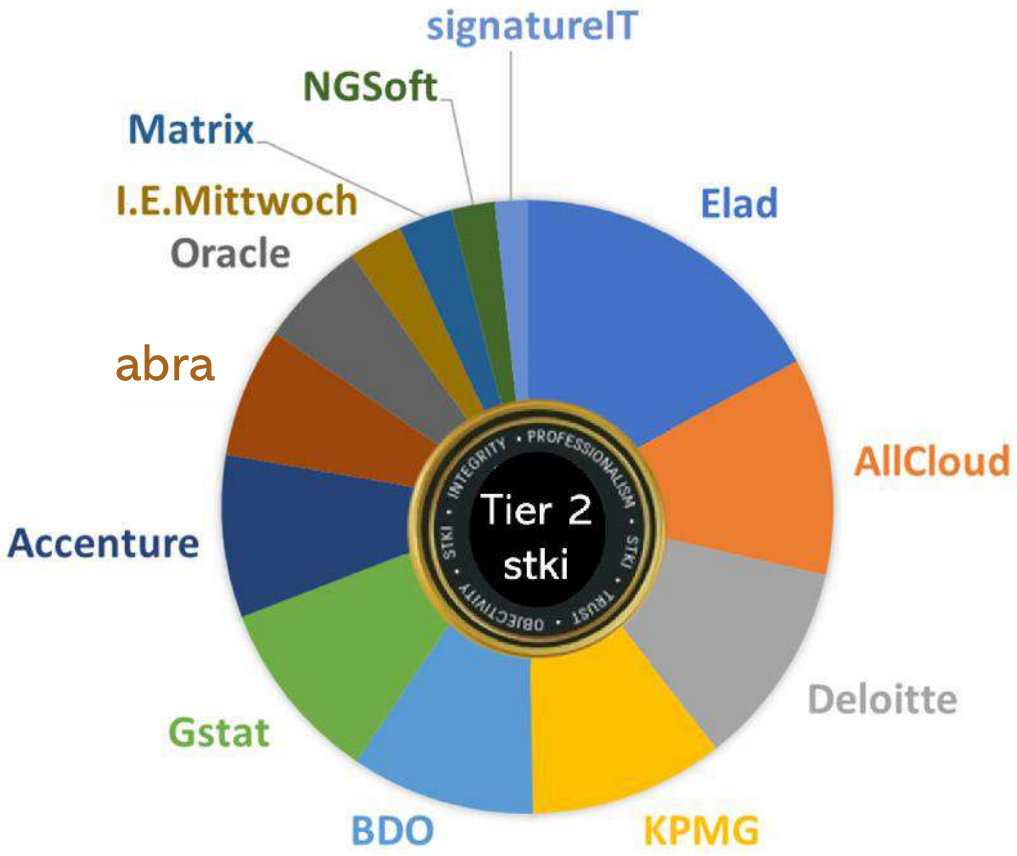

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DATA, ANALYTICS & BI PROJECTS MARKET 2018-2022

	2018		2019		2020		2021		2022
Advanced Analytics, Data Science and ML projects	$2.00	150.00%	$5.00	140.00%	$12.00	83.33%	$22.00	72.73%	$38.00
Data management implementation (quality, etl, catalogs...)	$25.00	40.00%	$35.00	-14.29%	$30.00	16.67%	$35.00	20.00%	$42.00
BI and Analytics implementation / development	$175.00	24.57%	$218.00	10.09%	$240.00	10.42%	$265.00	13.21%	$300.00
Data & Analytics Cloud migration (help in migrating DW and Data Lakes to the cloud)	$2.00	150.00%	$5.00	140.00%	$12.00	83.33%	$22.00	72.73%	$38.00
TOTALS	$204.00	28.92%	$263.00	11.79%	$294.00	17.01%	$344.00	21.51%	$418.00

Values in Million USD

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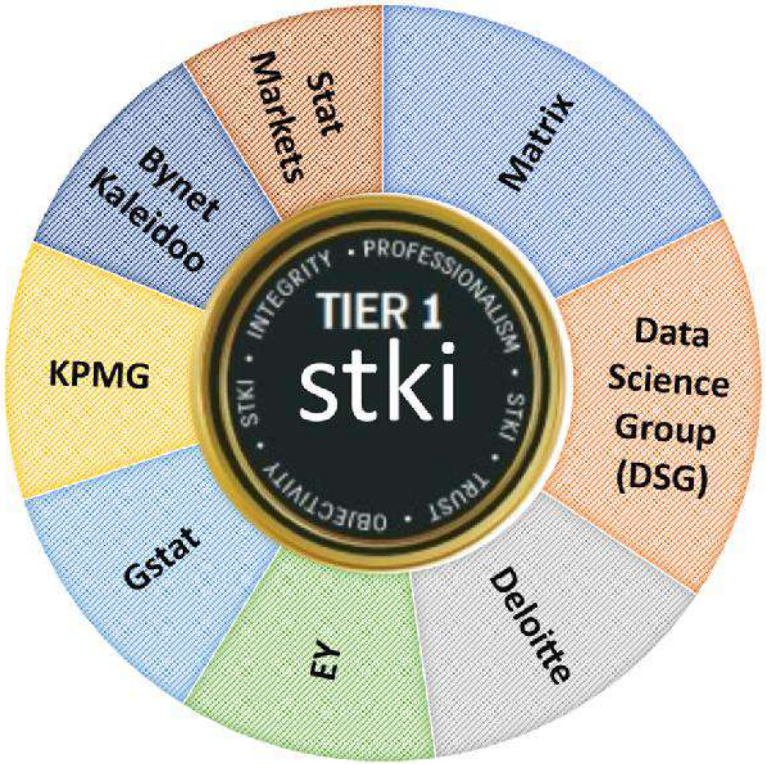
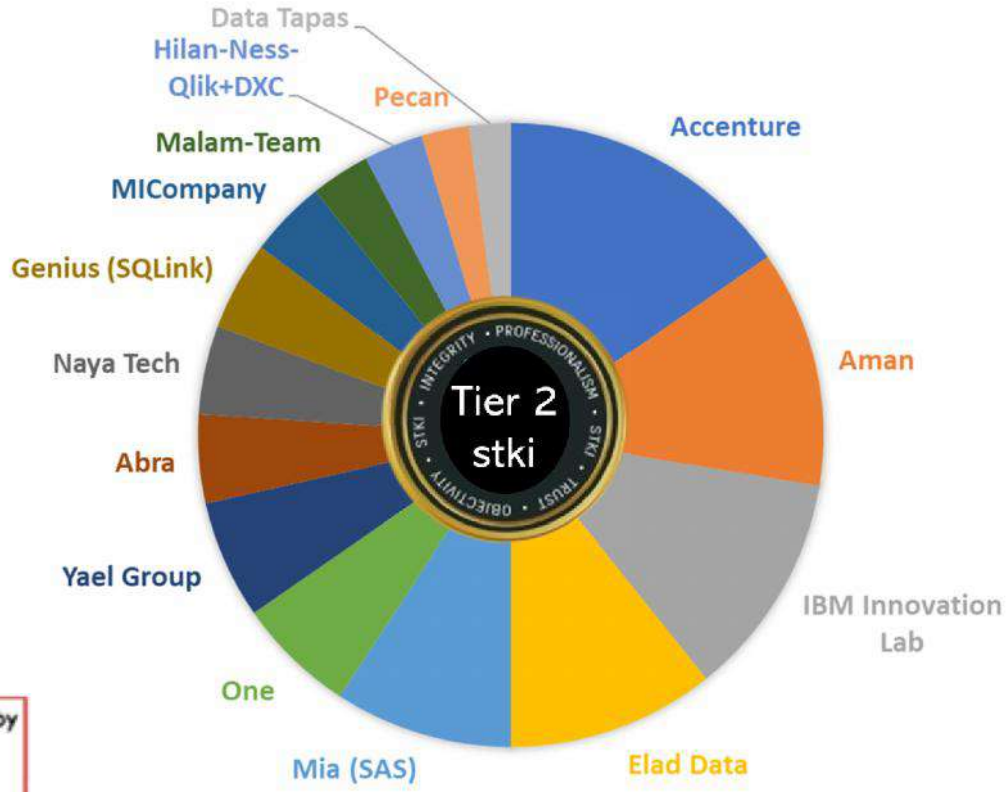
Advanced Analytics, Data Science and ML projects 265





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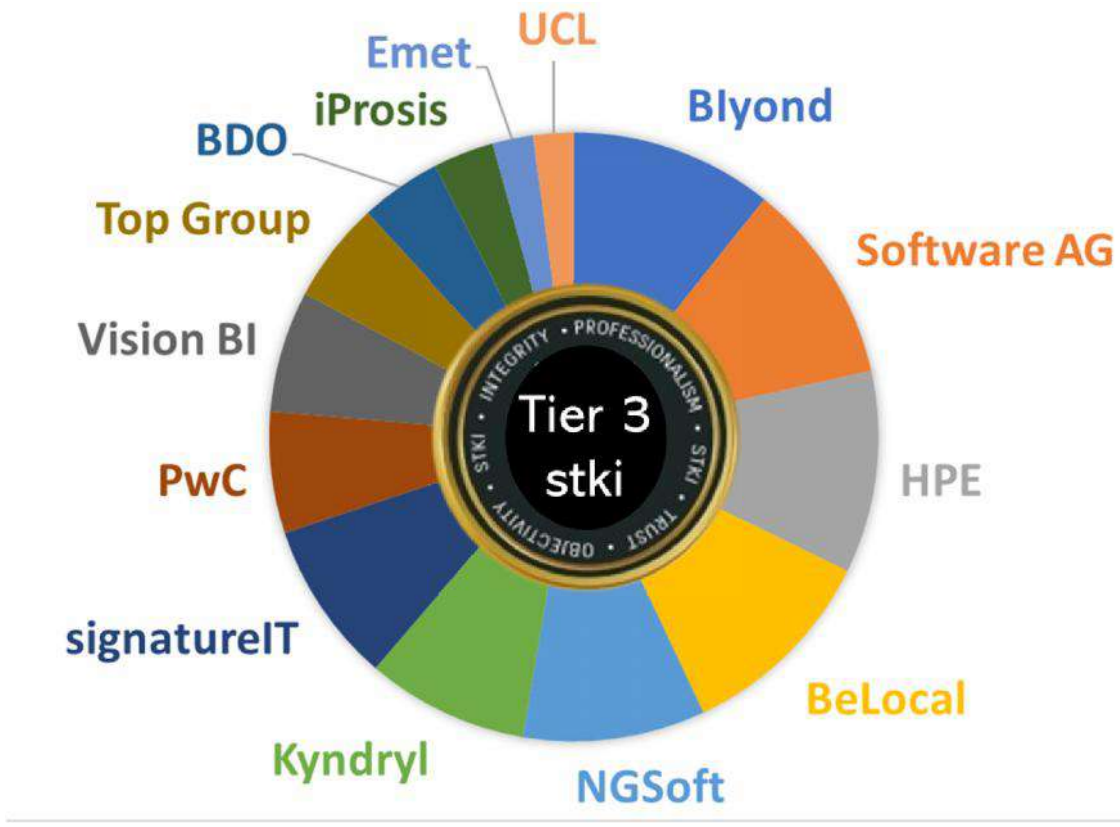
Advanced Analytics, Data Science and ML projects 266



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BI Implementation / Development

267

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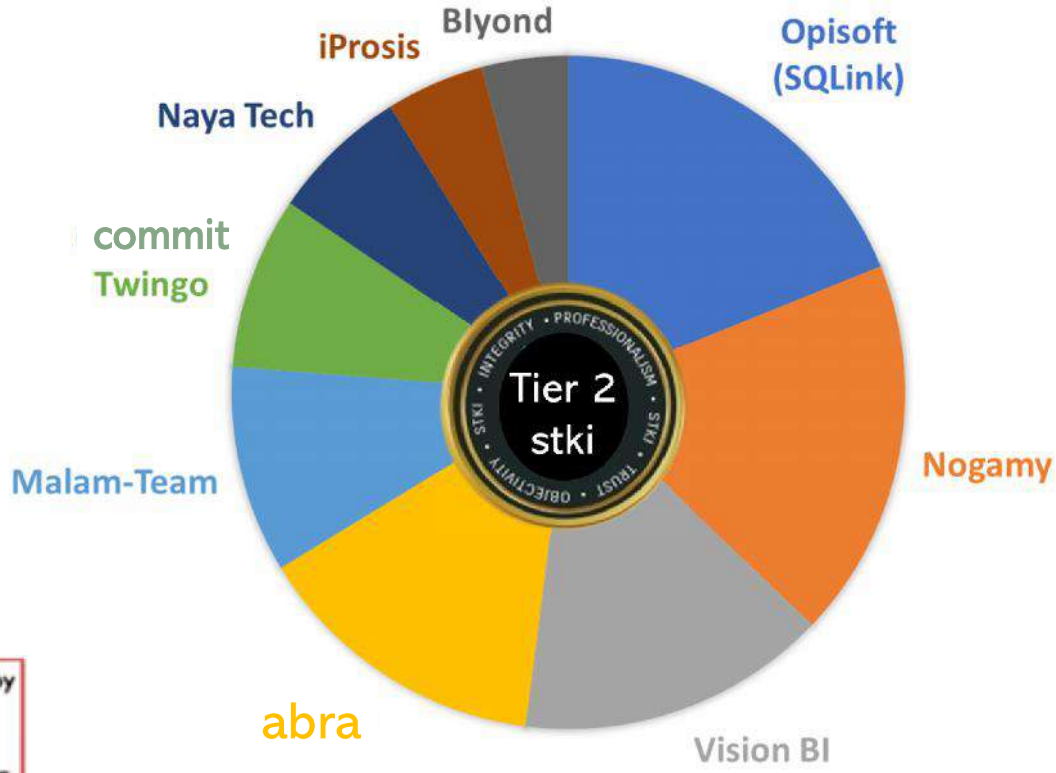

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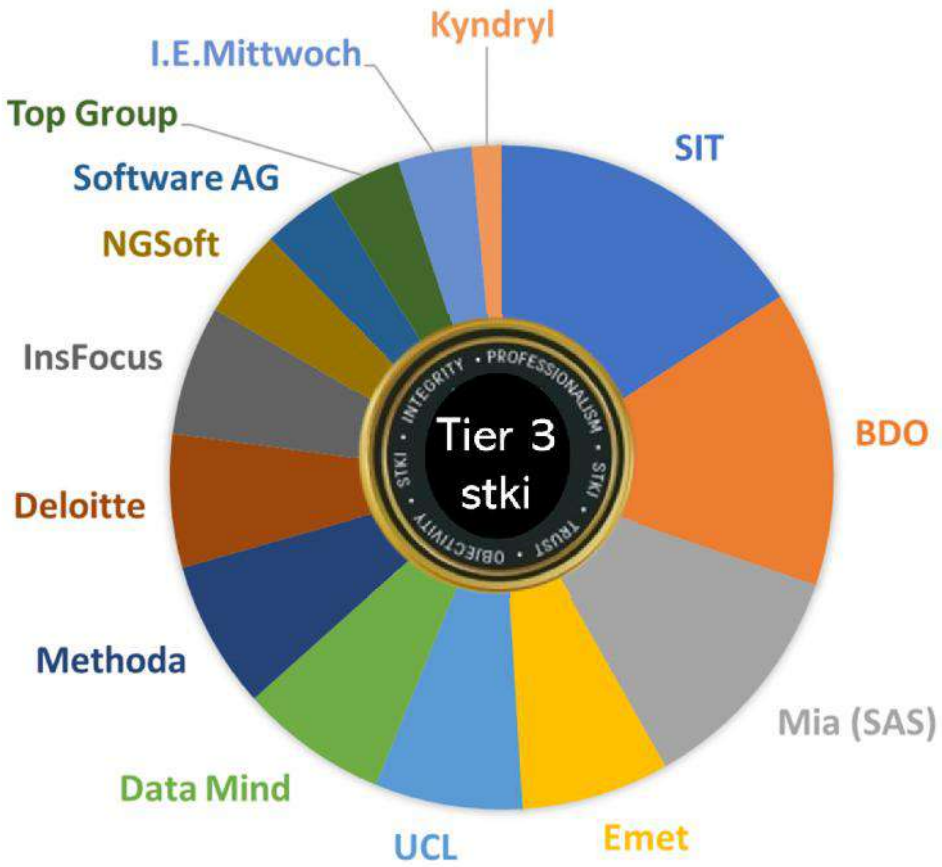
BI Implementation / Development

268



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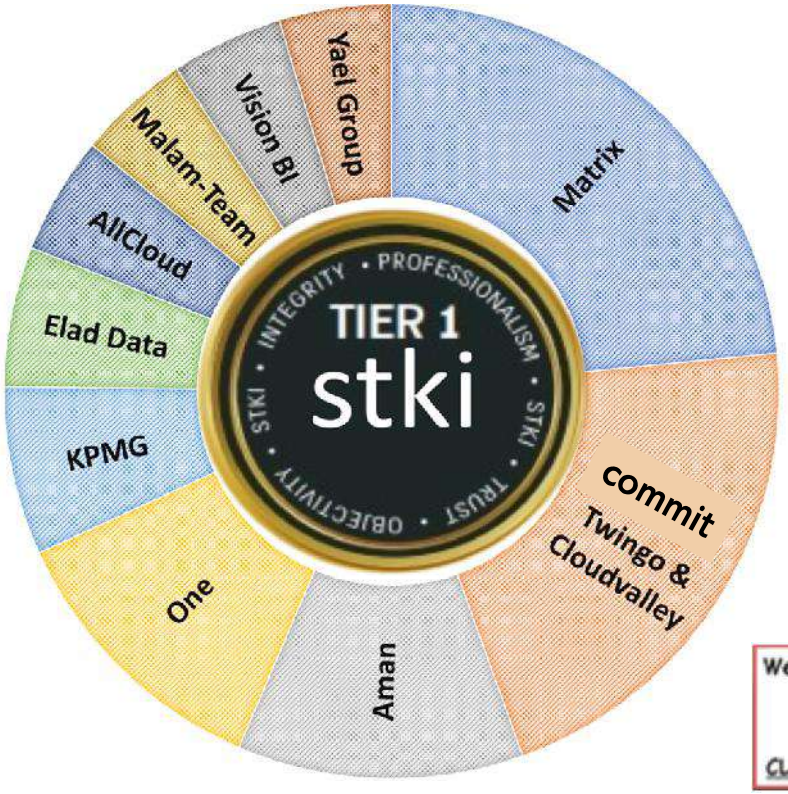
Data & Analytics Cloud Migration Projects 269



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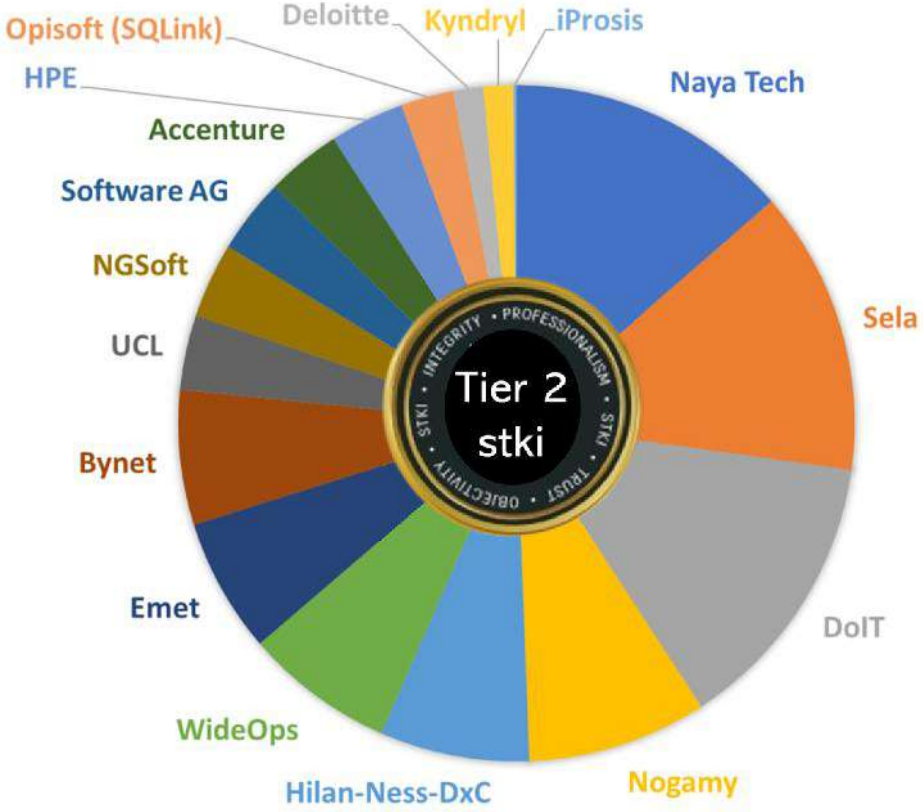

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BUSINESS APPLICATIONS DEVELOPMENT & IMPLEMENTATIONS MARKET 2018-2022

	2018		2019		2020		2021		2022
General Software Development (except Web & Mobile)	$105.00	11.43%	$117.00	-18.80%	$95.00	36.84%	$130.00	15.38%	$150.00
Web & Mobile Development	$29.00	10.34%	$32.00	34.38%	$43.00	34.88%	$58.00	37.93%	$80.00
UX Design	$47.00	11.70%	$52.50	14.29%	$60.00	15.00%	$69.00	14.49%	$79.00
TOTALS	$181.00	11.33%	$201.50	-1.74%	$198.00	29.80%	$257.00	20.23%	$309.00

Values in Million USD

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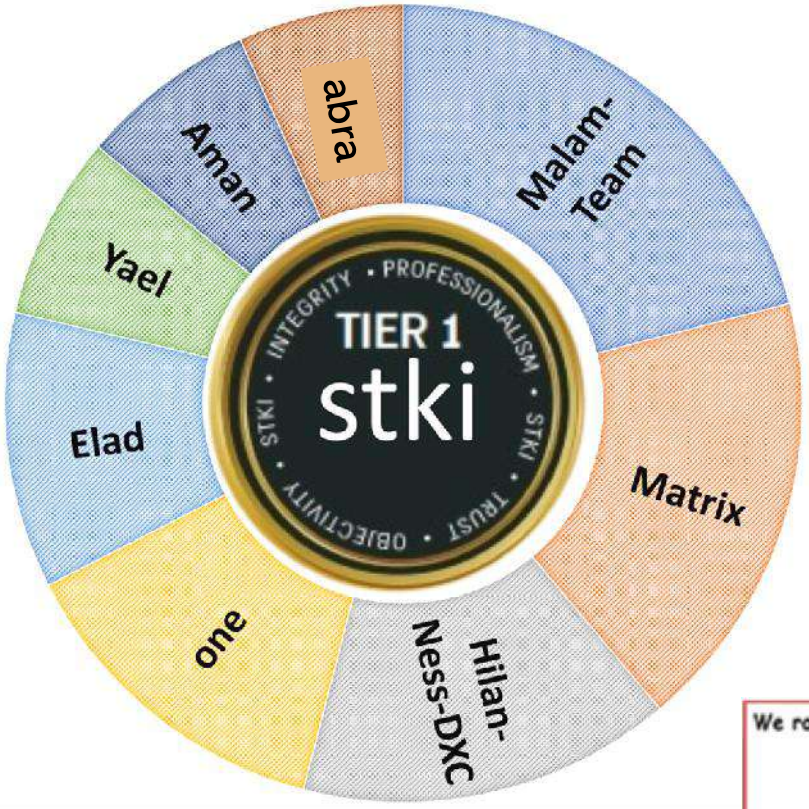
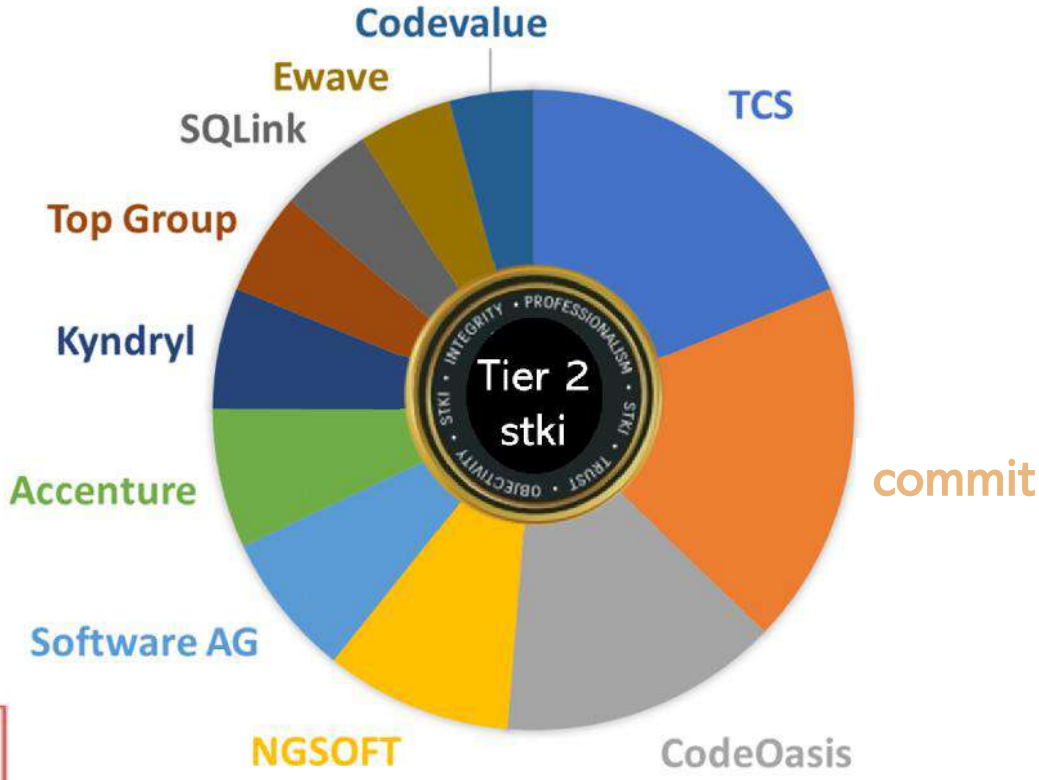
General Software Development (except Web & Mobile) 271





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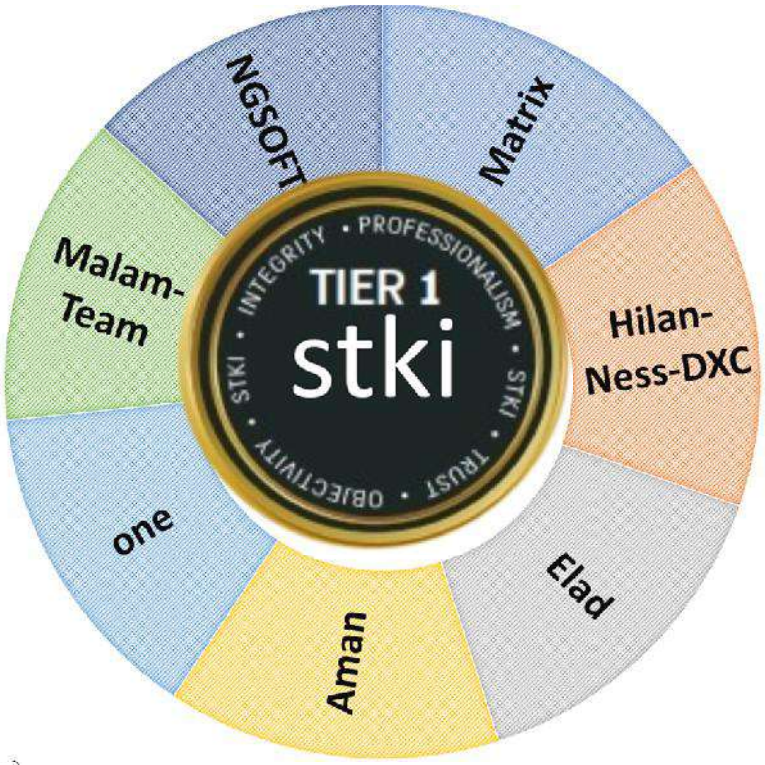
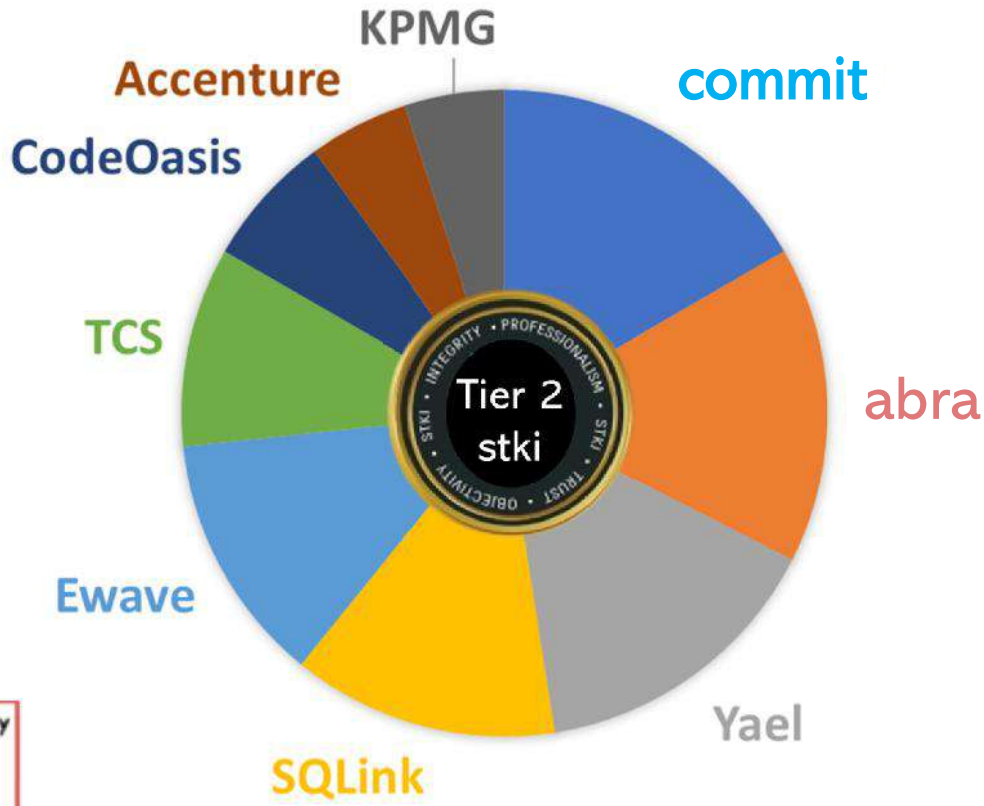
Web & Mobile Development 272





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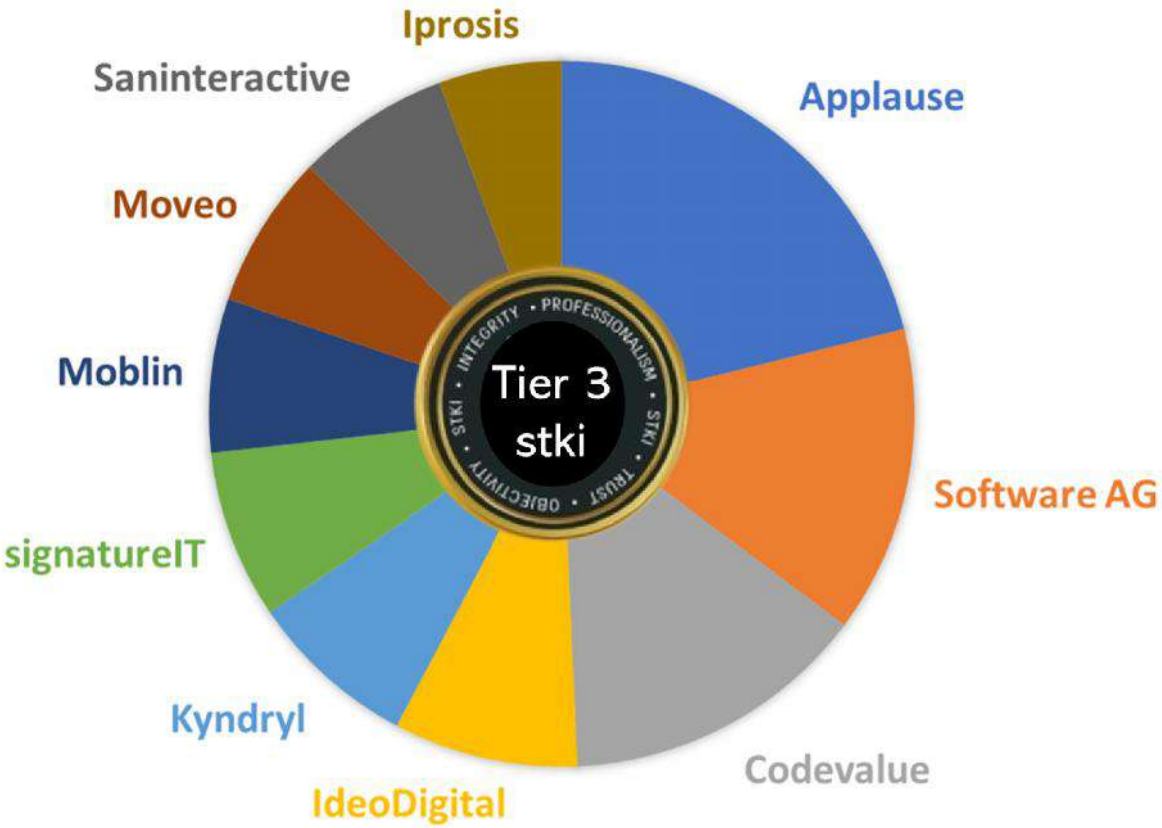
Web & Mobile Development 273



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UX Design

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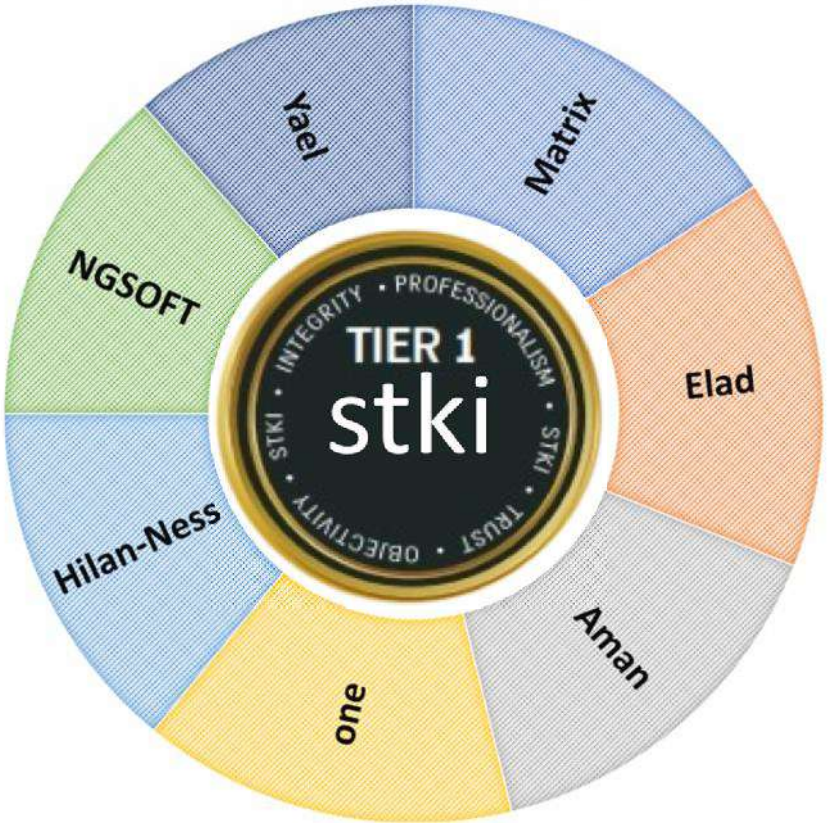

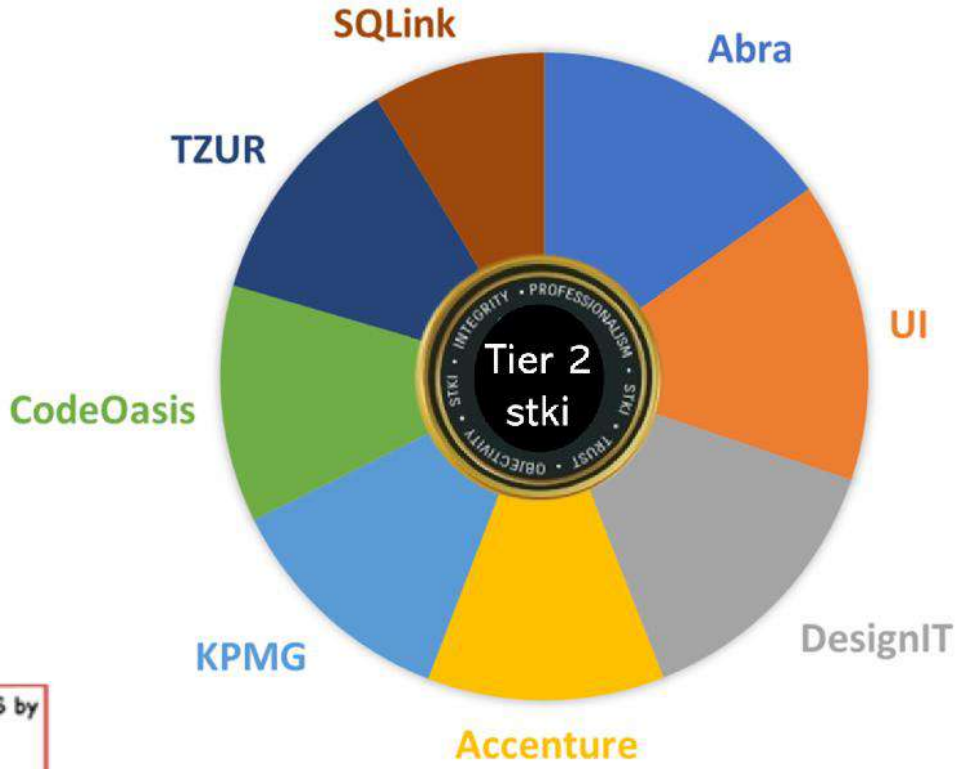

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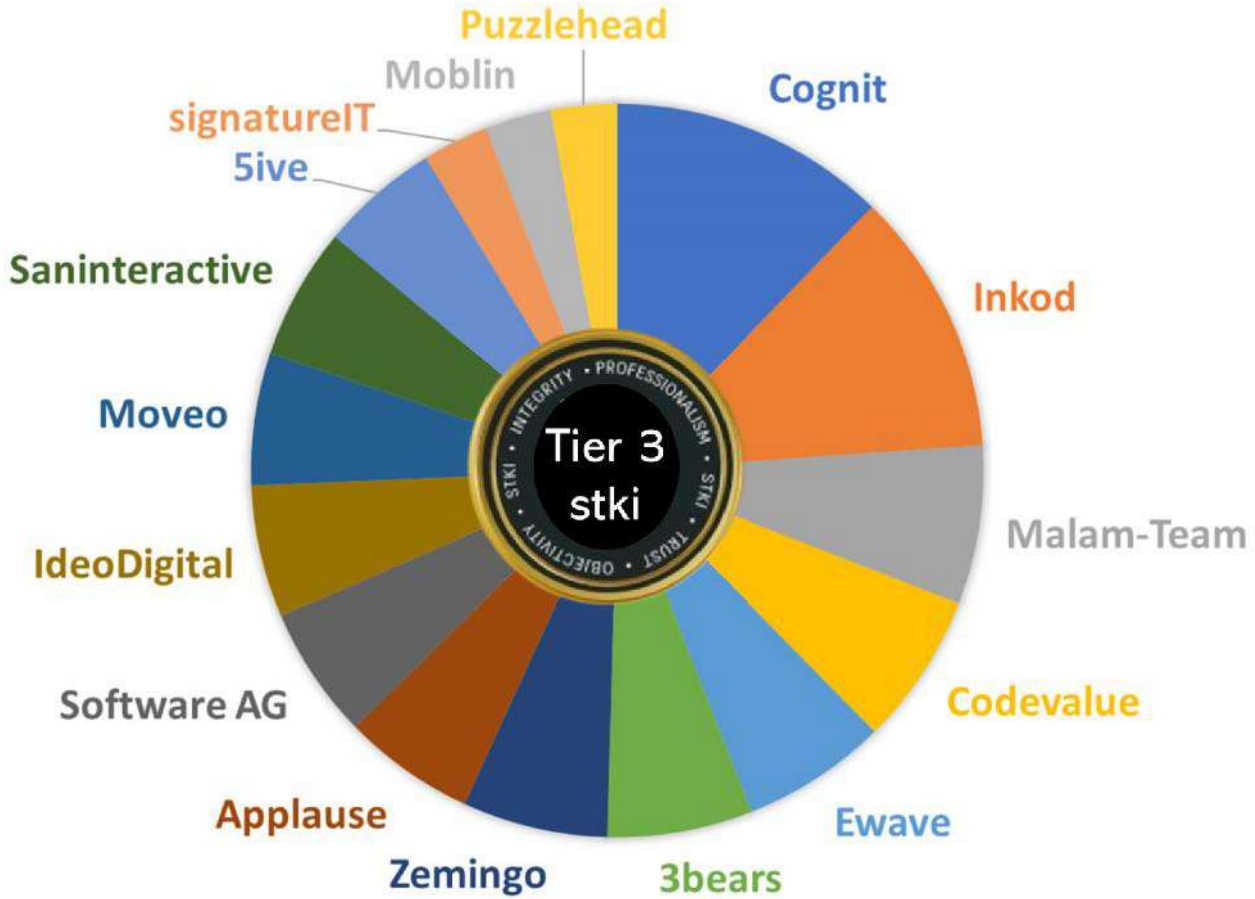
UX Design 275



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INDUSTRY SPECIFIC & SPECIAL PURPOSE DEVELOPMENT & IMPLEMENTATIONS MARKET 2018-2022

276

	2018		2019		2020		2021		2022
Finance Industry Core Projects	$150.00	33.33%	$200.00	-35.00%	$130.00	-15.38%	$110.00	9.09%	$120.00
Transportation	$50.00	20.00%	$60.00	25.00%	$75.00	13.33%	$85.00	12.94%	$96.00
Public (COVID19) Projects	$0.00	#DIV/0!	$0.00	#DIV/0!	$120.00	-58.33%	$50.00	-100.00%	$0.00
e-payments Projects	$0.00	#DIV/0!	$8.00	337.50%	$35.00	28.57%	$45.00	37.78%	$62.00
Retail Projects	$0.00	#DIV/0!	$20.00	110.00%	$42.00	78.57%	$75.00	26.67%	$95.00
Public (government) modernizations	$60.00	8.33%	$65.00	-46.15%	$35.00	28.57%	$45.00	33.33%	$60.00
OTHERS:	$30.00	33.33%	$40.00	-37.50%	$25.00	80.00%	$45.00	11.11%	$50.00
TOTALS	$290.00	35.52%	$393.00	17.56%	$462.00	-1.52%	$455.00	6.15%	$483.00

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ENGAGEMENT & KNOWLEDGE MANAGEMENT PROJECTS MARKET 2018-2022

277

	2018		2019		2020		2021		2022
Contact Center and Multi channel engagement projects	$45.00	6.67%	$48.00	35.42%	$65.00	15.38%	$75.00	6.67%	$80.00
Employee Collaboration & Engagement Tools	$10.00	25.00%	$12.50	140.00%	$30.00	16.67%	$35.00	20.00%	$42.00
Knowledge Management (ECM, Portals, Search, Knowledgebases..)	$78.00	7.69%	$84.00	-10.71%	$75.00	6.67%	$80.00	6.25%	$85.00
TOTALS	$133.00	8.65%	$144.50	17.65%	$170.00	11.76%	$190.00	8.95%	$207.00

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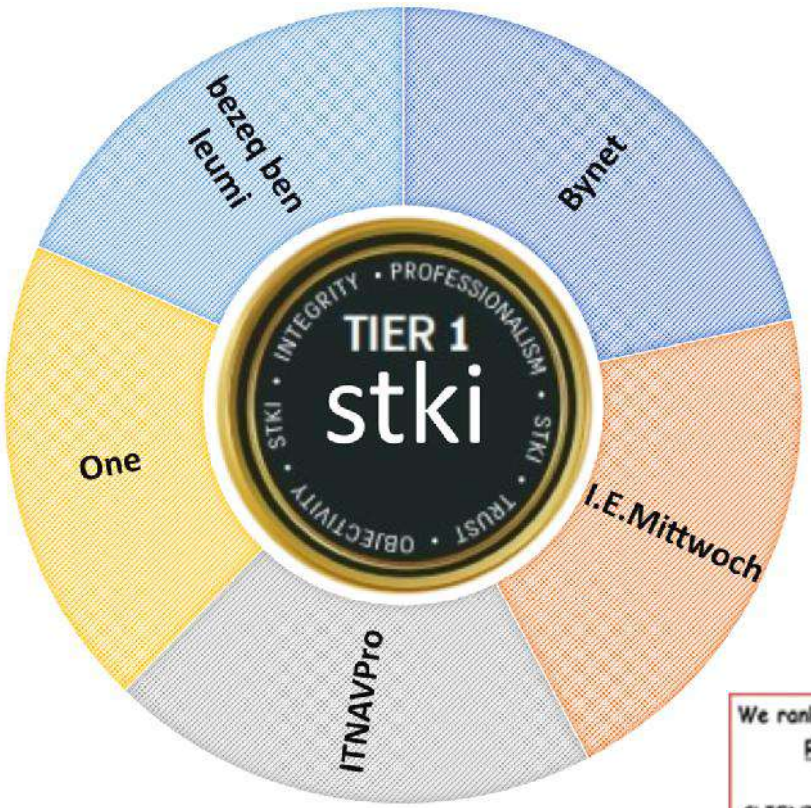
Contact Center & Multi Channel Engagement Projects 278



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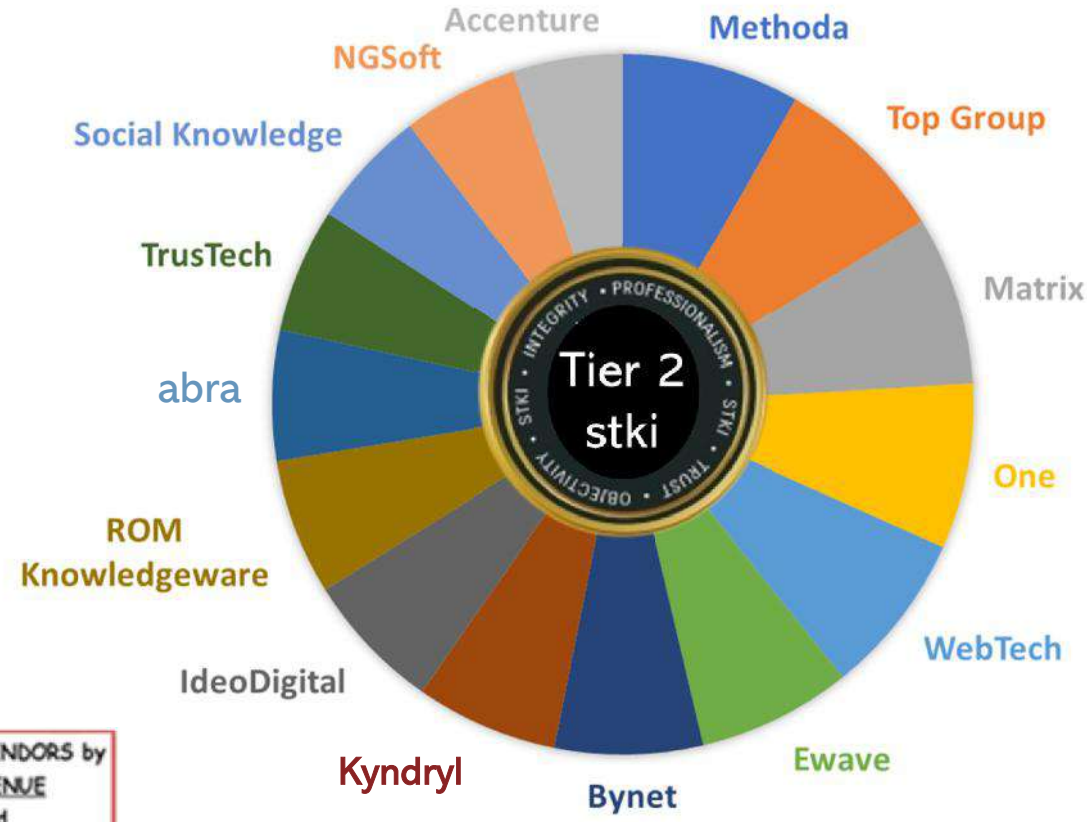
Employee Collaboration & Engagement Projects 279



We rank VENDORS by REVENUE and CLIENT MINDSHARE

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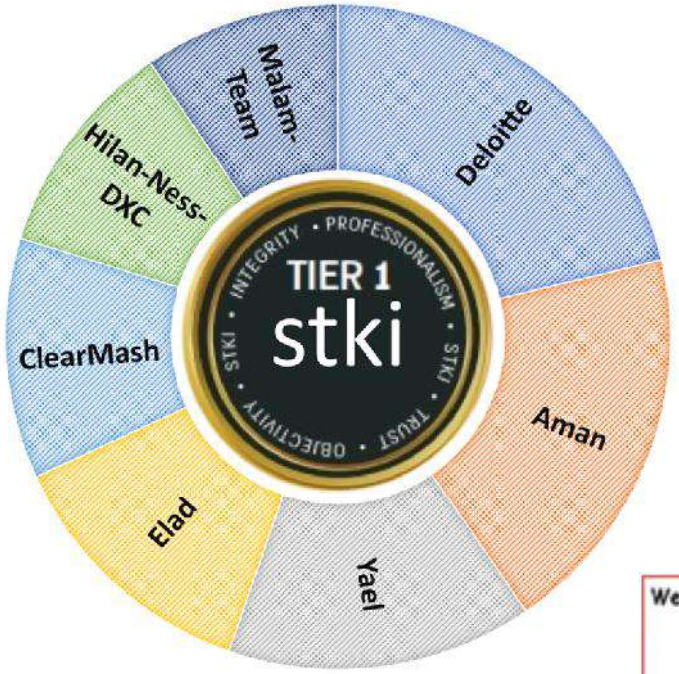
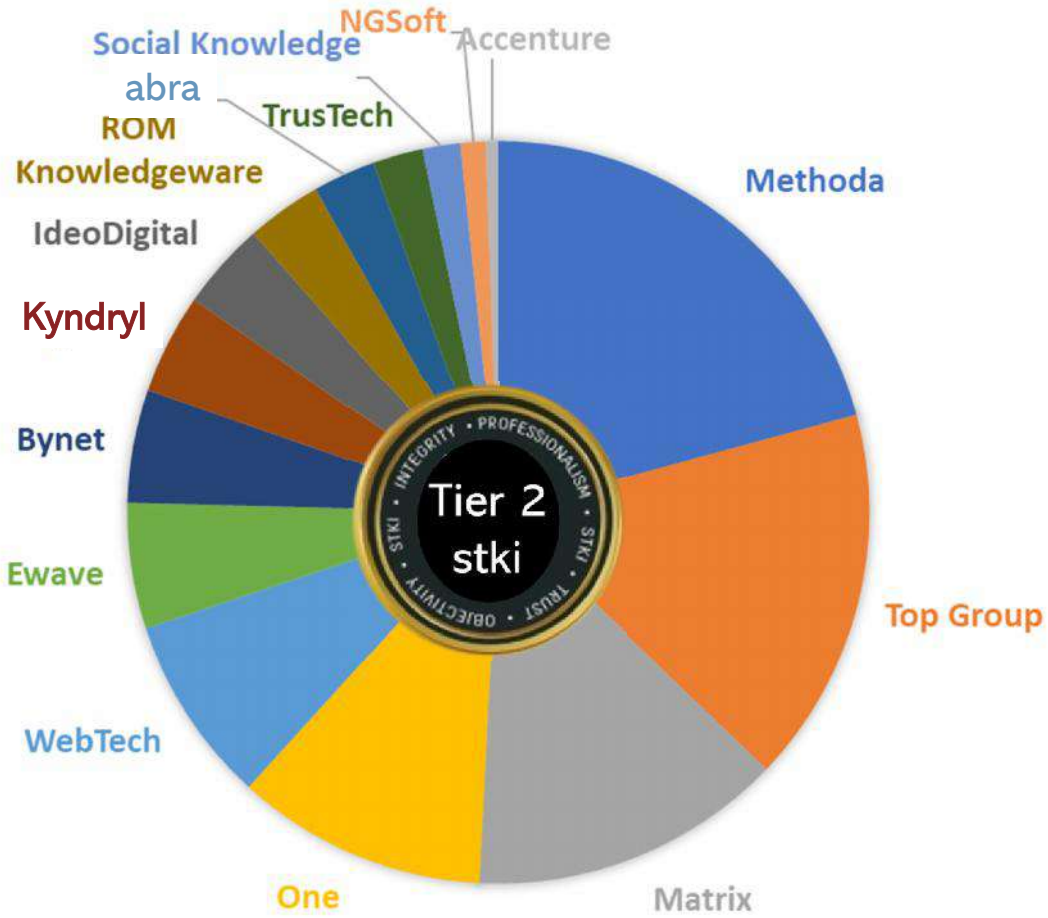
value added services market

Knowledge Management Projects 280



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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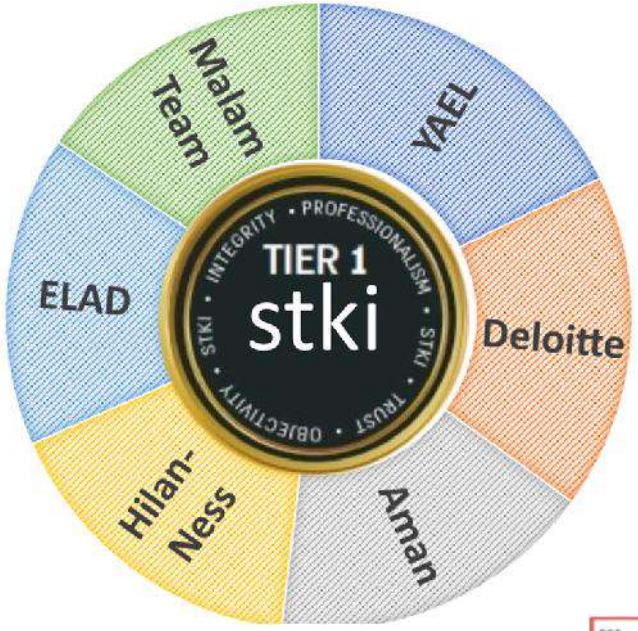
value added services market

Knowledge Management (ECM, Portals, Search, Knowledgebases..) 281



We rank VENDORS by
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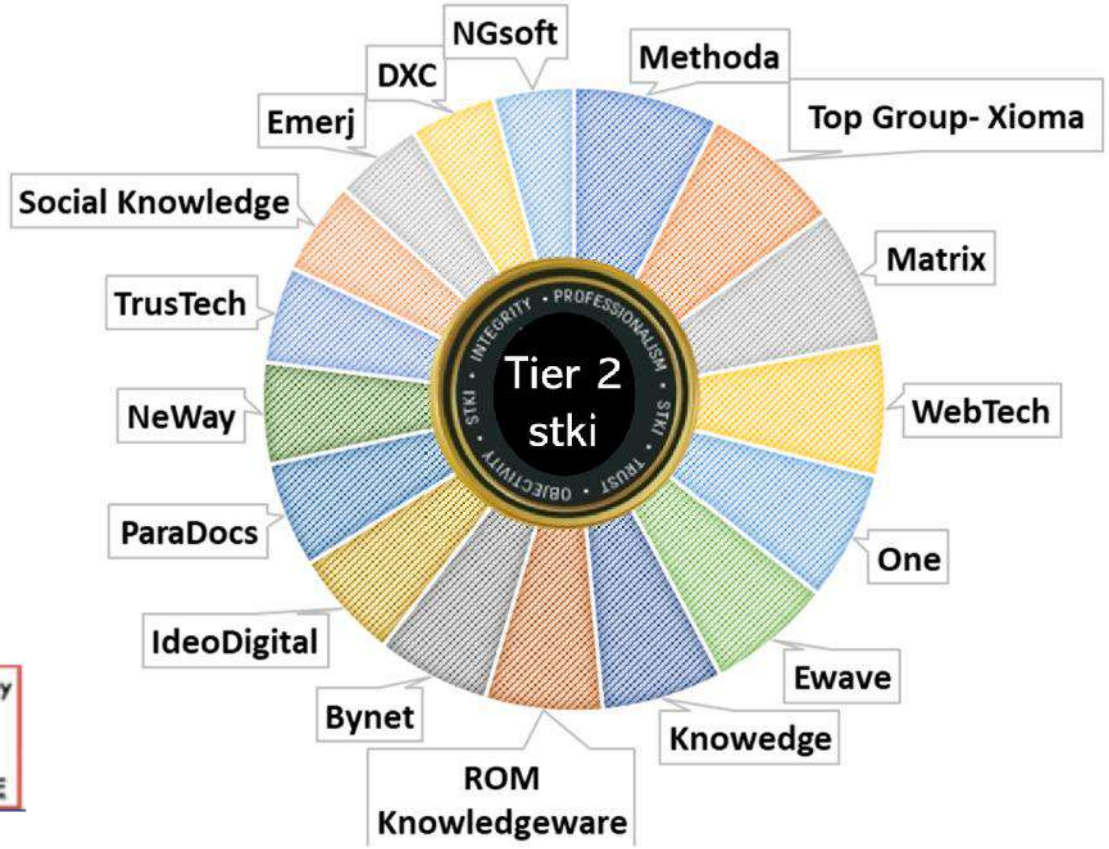
and
CLIENT MINDSHARE



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INNOVATION PROJECTS & IMPLEMENTATIONS MARKET 2018-2022

282

	2018		2019		2020		2021		2022
Technological Innovation Projects	$20.00	25.00%	$25.00	-60.00%	$10.00	80.00%	$18.00	66.67%	$30.00
Automation tools (RPA, OCR) Implementations	$3.00	36.67%	$4.10	509.76%	$25.00	28.00%	$32.00	25.00%	$40.00
Blockchain projects	$1.00	50.00%	$1.50	166.67%	$4.00	50.00%	$6.00	66.67%	$10.00
IoT Projects	$3.50	114.29%	$7.50	-33.33%	$5.00	30.00%	$6.50	53.85%	$10.00
TOTALS	$27.50	38.55%	$38.10	15.49%	$44.00	42.05%	$62.50	44.00%	$90.00

Values in Million USD

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Technological Innovation Projects 283

Technological Innovation Projects (alphabetical order)	
Abra	IBM
Accenture	KPMG
aman	Kyndryl
AWS	Malam-Team
BCG	Matrix
Bunkersec	Microsoft
Bynet	Netalizer
DellEMC	one
Elad	Oracle
Google	PwC
Hilan-Ness-DXC	Salesforce
HMS	ServiceNow
HPE	Strauss Strategy

We rank VENDORS by
REVENUE
and
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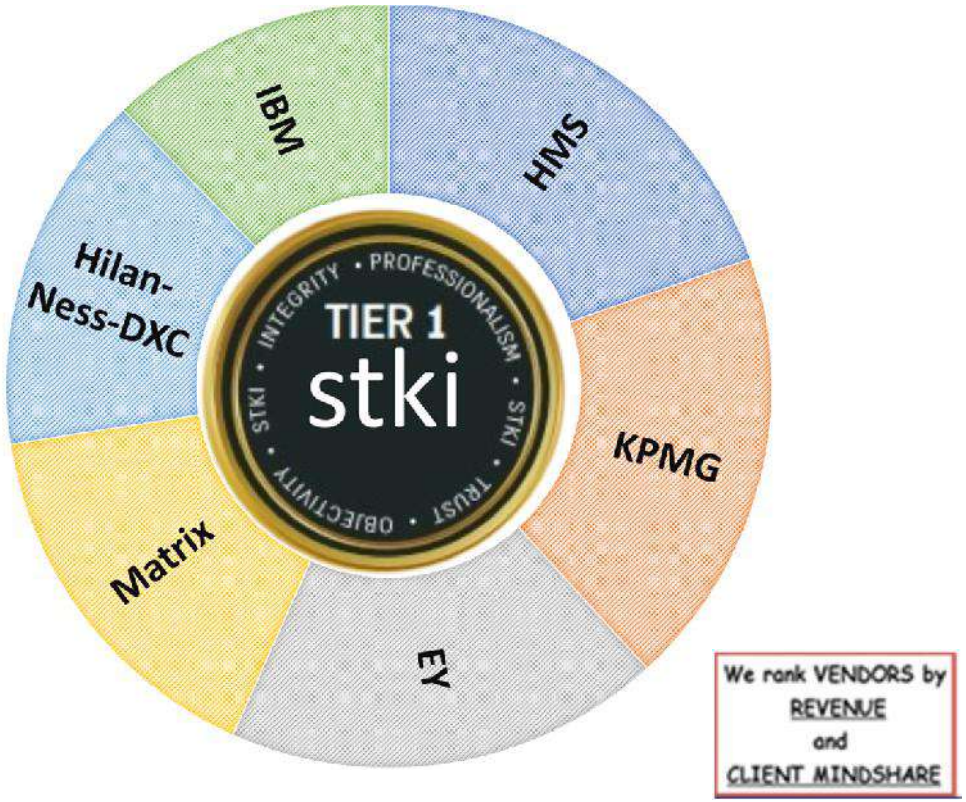
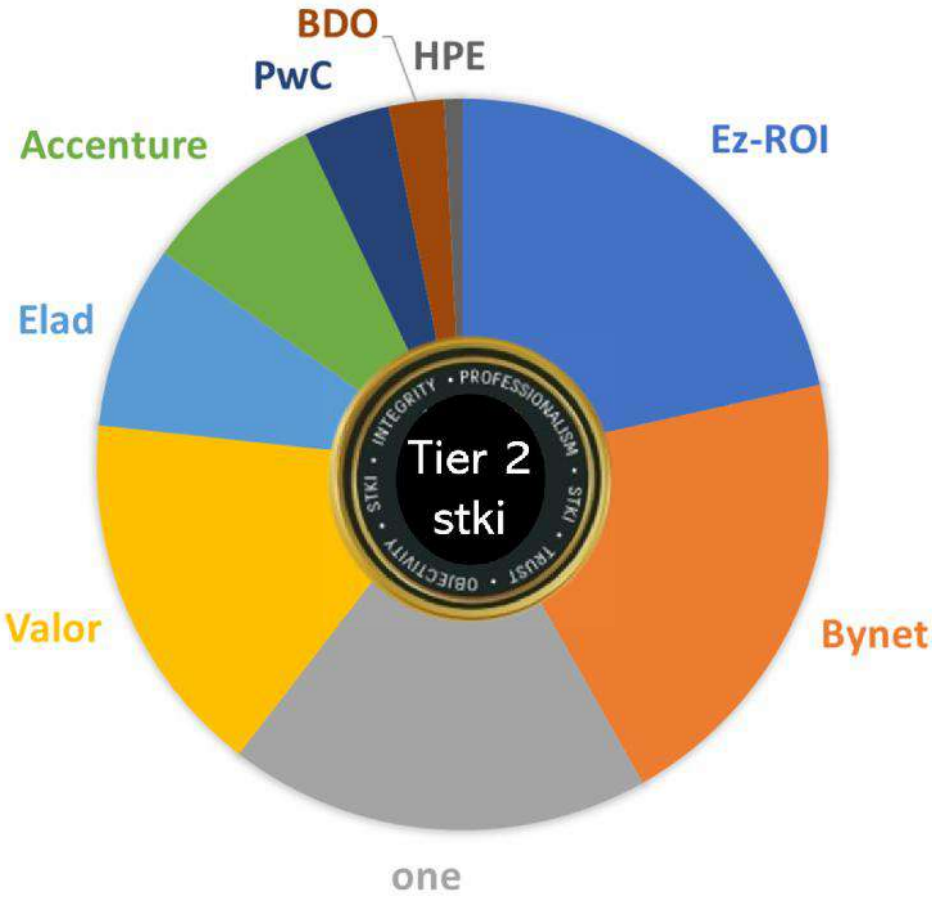
value added services market

Automation Tools (RPA, OCR, others) Consulting & Implementations 284



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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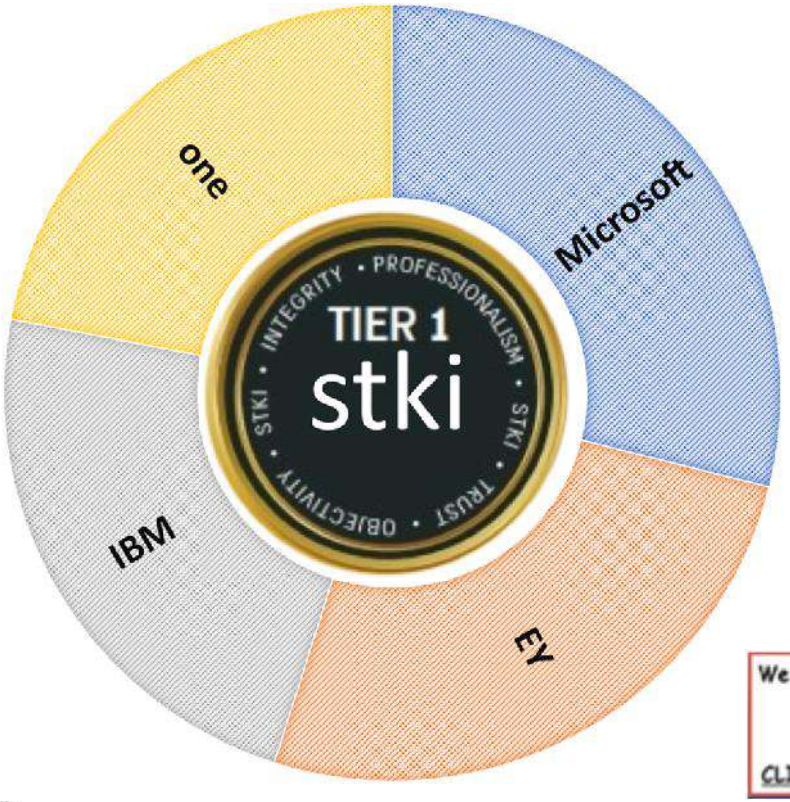
value added services market

Blockchain Projects 285



We rank VENDORS by
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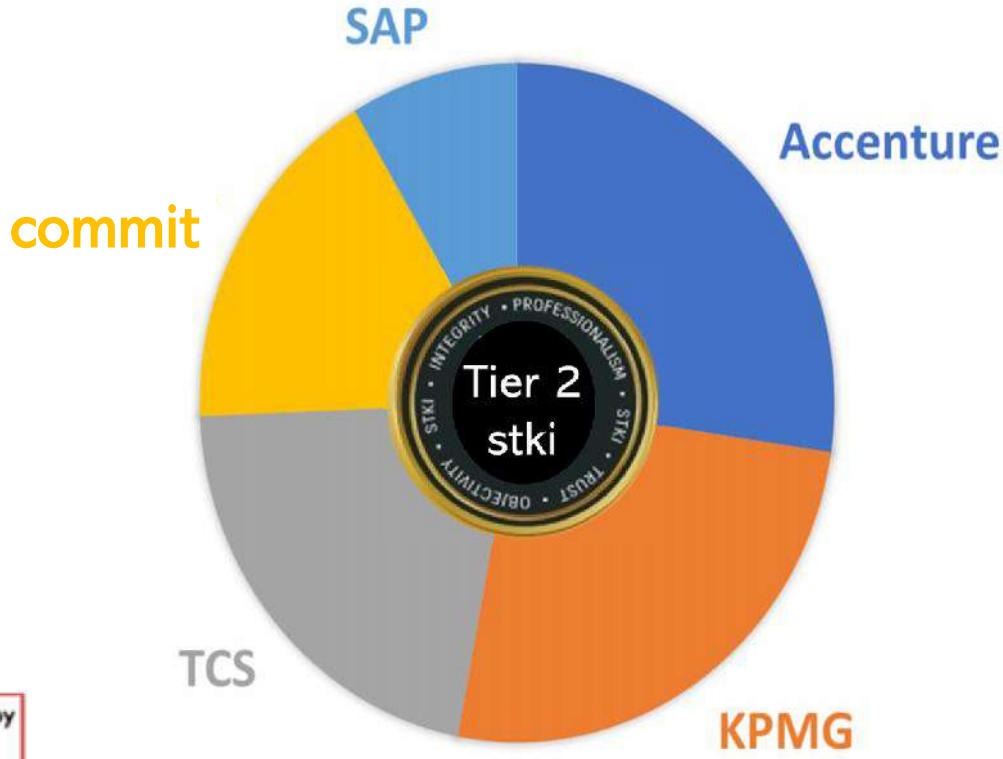
and
CLIENT MINDSHARE



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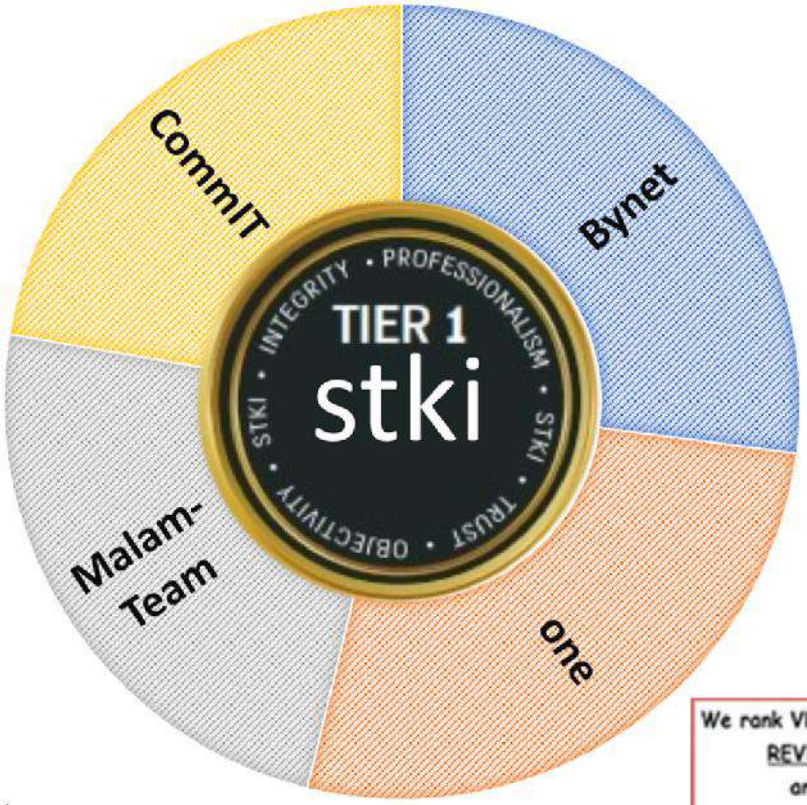
value added services market

IoT Projects

286



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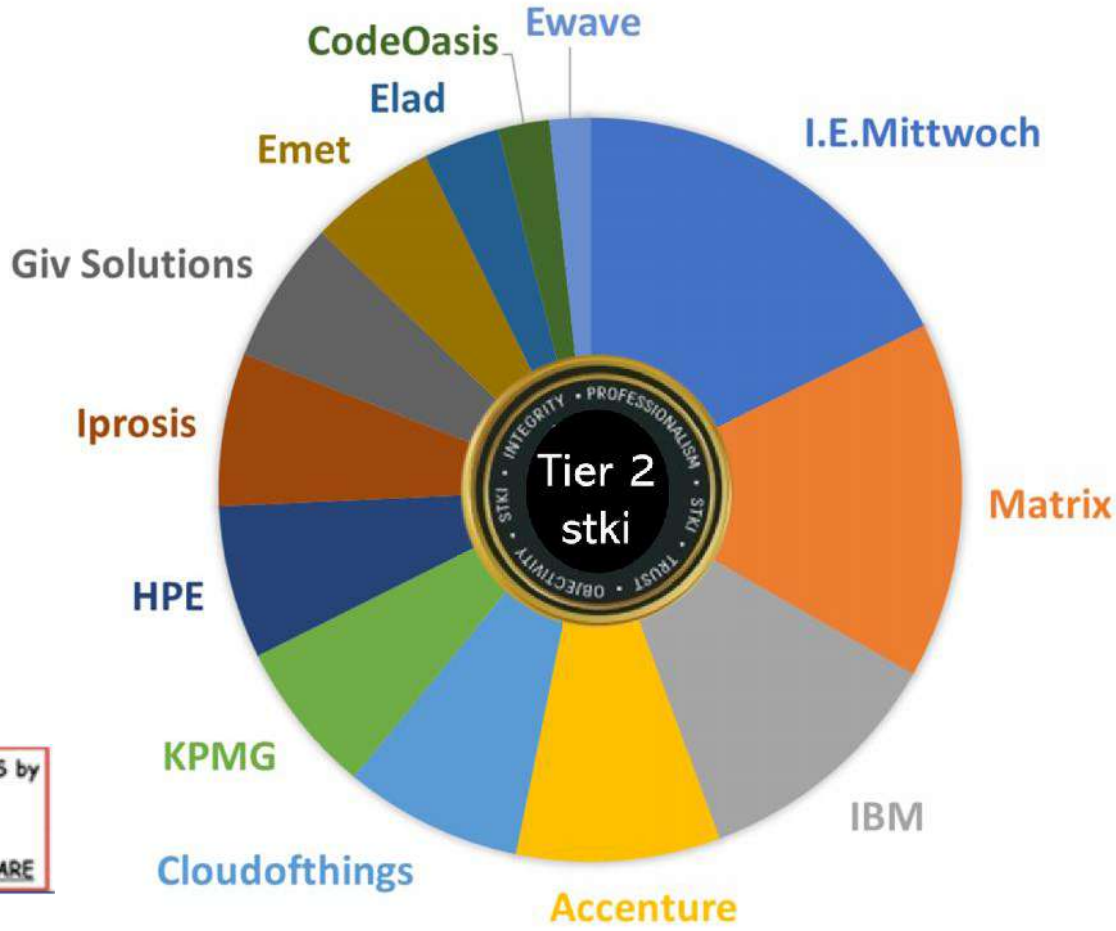

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TESTING, TRAINING, FRUITION & HATMAA PROJECTS MARKET 2018-2022

287

	2018		2019		2020		2021		2022
Professional Education, Coaching & Mentoring	$65.00	2.31%	$66.50	-15.79%	$56.00	-10.71%	$50.00	8.00%	$54.00
Project testing & QA	$100.00	5.00%	$105.00	4.76%	$110.00	4.55%	$115.00	2.61%	$118.00
Fruition & Implementation (הטמעה)	$82.00	2.44%	$84.00	-10.71%	$75.00	6.67%	$80.00	5.00%	$84.00
TOTALS	$247.00	3.44%	$255.50	-5.68%	$241.00	1.66%	$245.00	4.49%	$256.00

Values in Million USD

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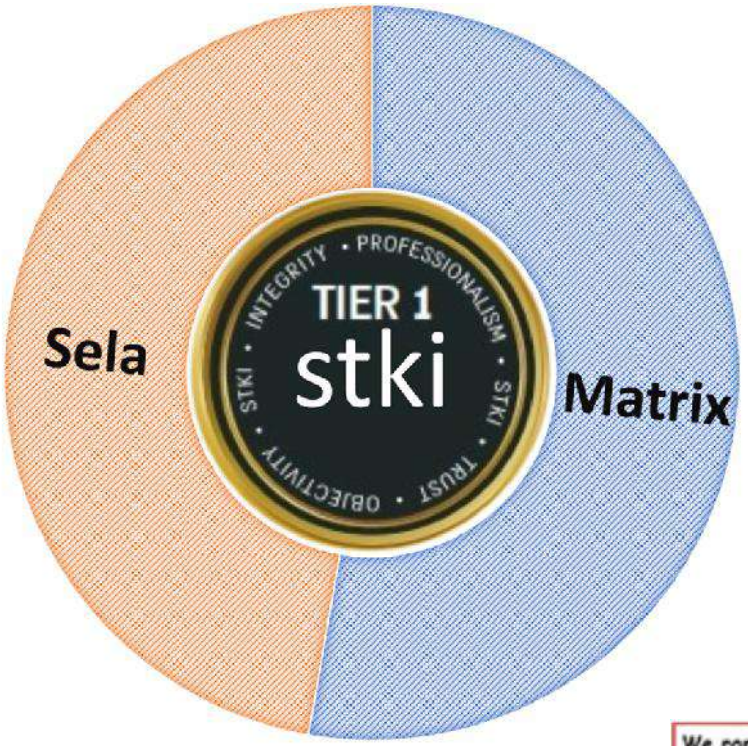
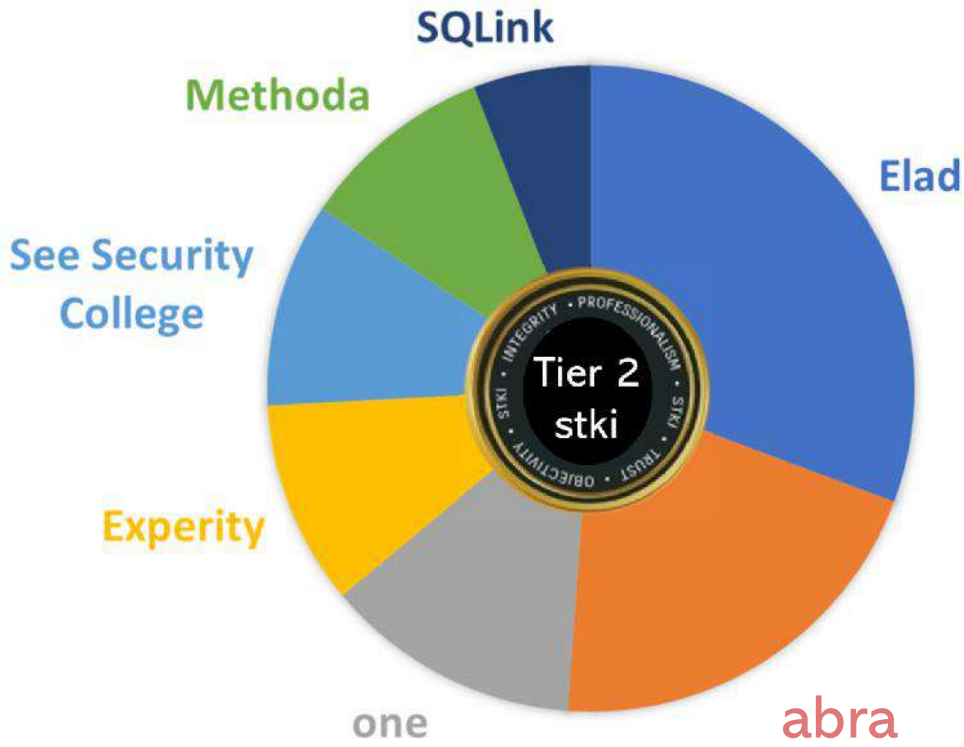
value added services market

Professional Education, Coaching & Mentoring 288





We rank VENDORS by
REVENUE
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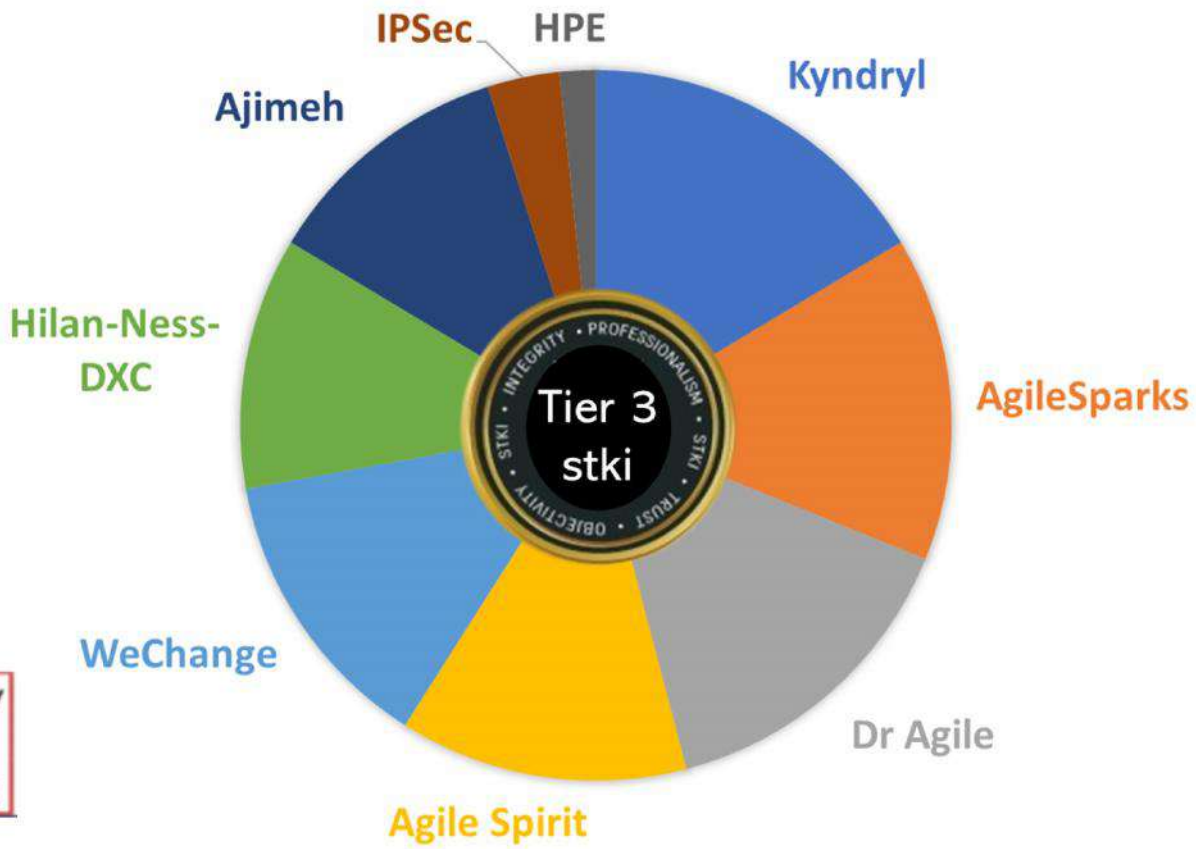
value added services market

Professional Education, Coaching & Mentoring 289



We rank VENDORS by REVENUE and CLIENT MINDSHARE

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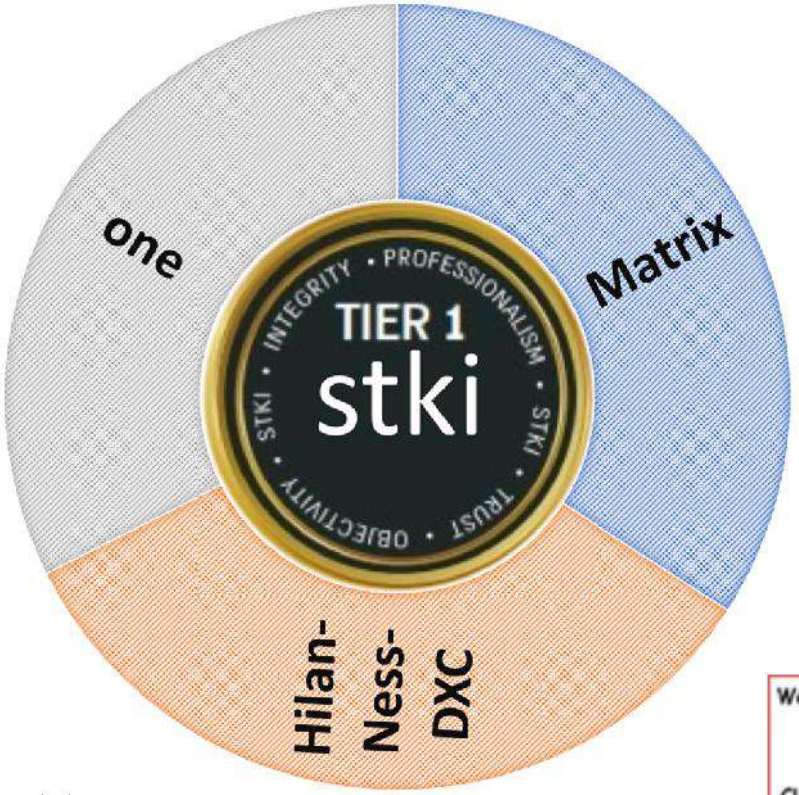
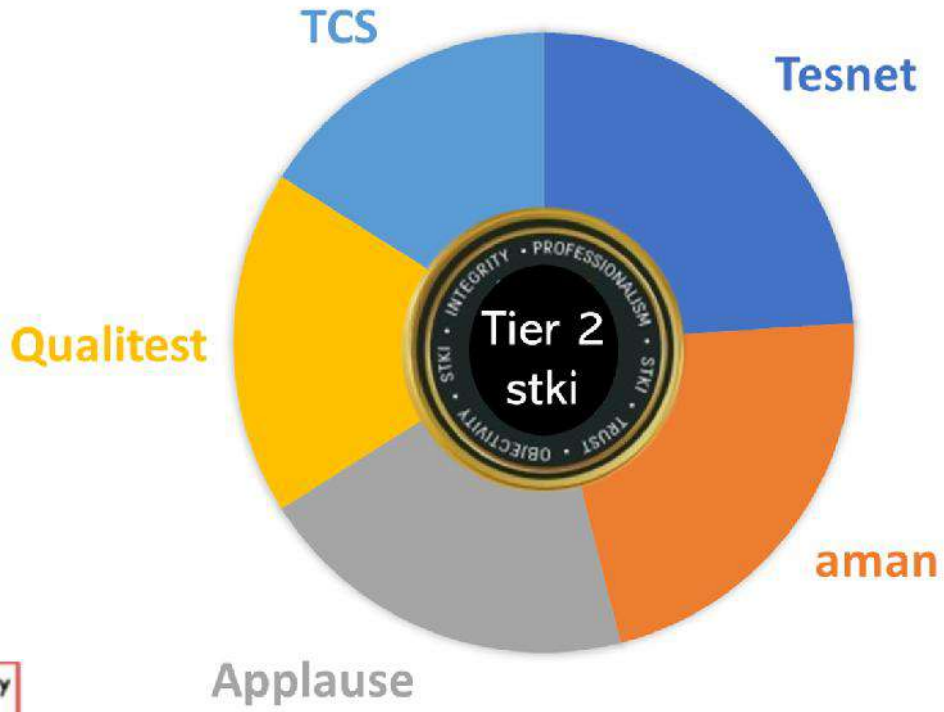
Project Testing & QA

290





We rank VENDORS by
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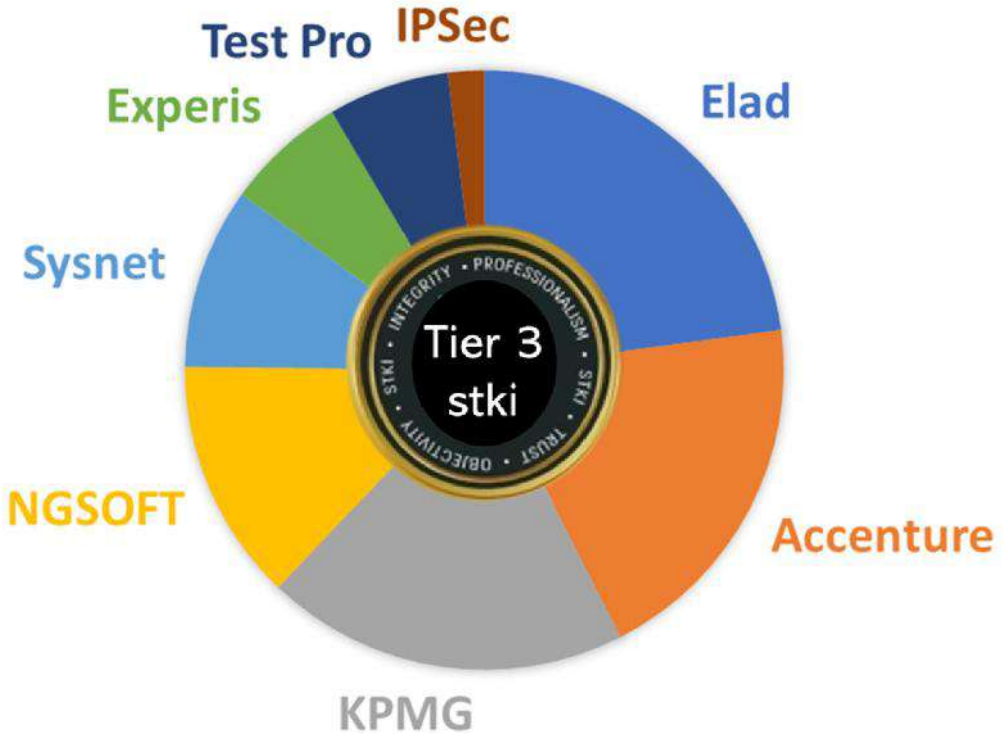
value added services market

Project Testing & QA 291



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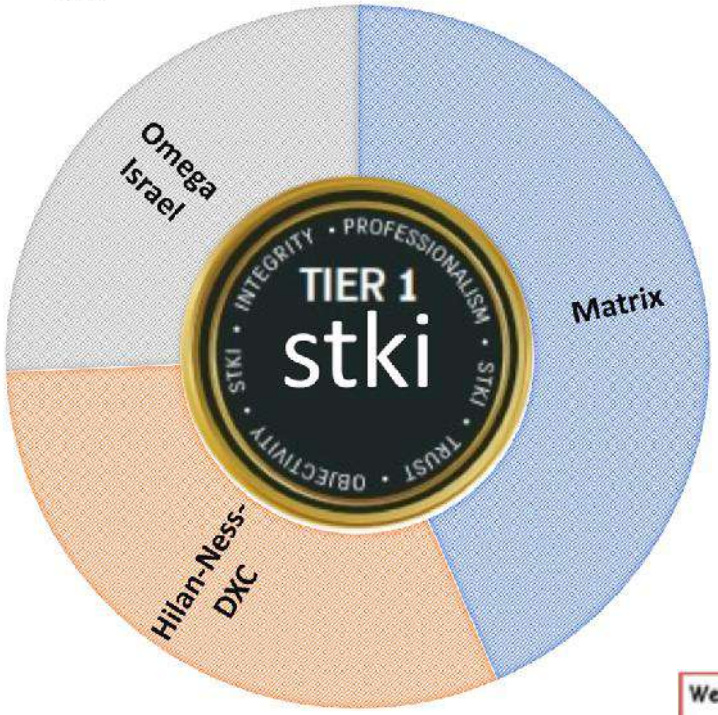
Fruition & Implementation (הטמעה) 292



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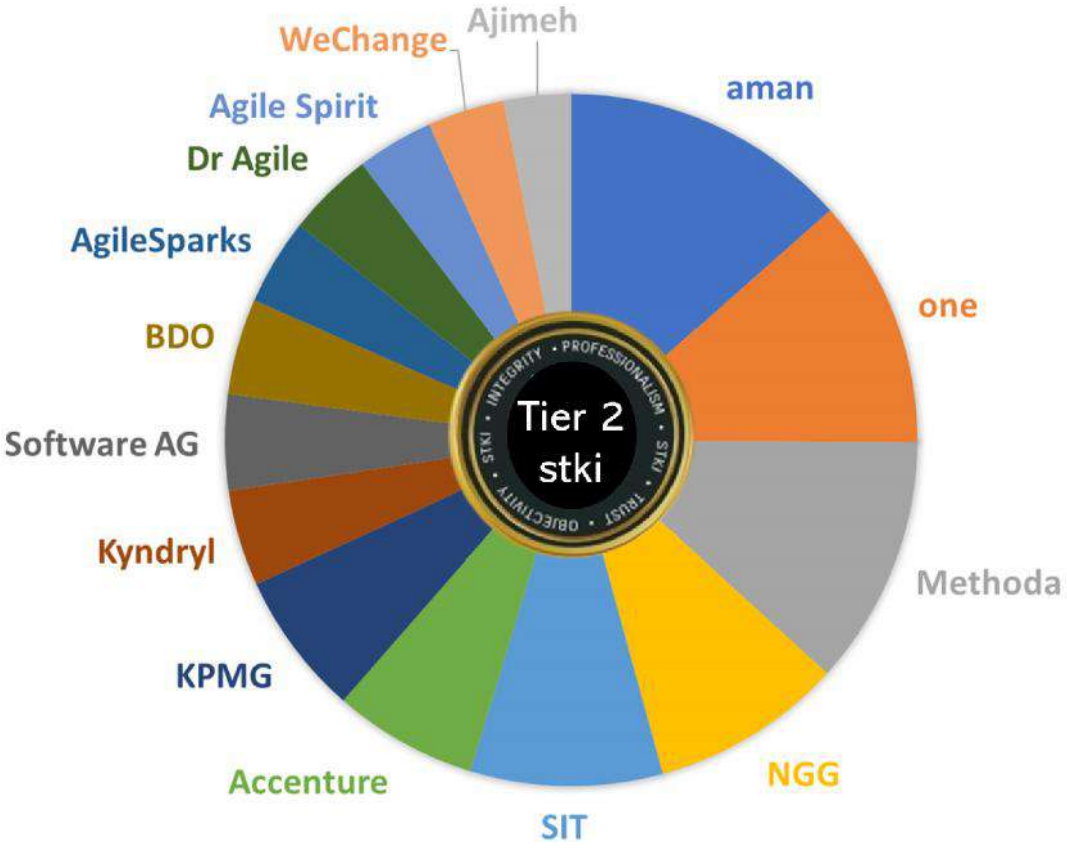

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EGRC & REGULATION PROJECTS & IMPLEMENTATIONS MARKET 2018-2022

293

	2018		2019		2020		2021		2022
Regulation Projects	$60.00	6.67%	$64.00	-21.88%	$50.00	10.00%	$55.00	27.27%	$70.00
Auditing, Governance & Risk Management	$72.00	4.17%	$75.00	-22.67%	$58.00	6.90%	$62.00	8.06%	$67.00
TOTALS	$132.00	5.30%	$139.00	-22.30%	$108.00	8.33%	$117.00	17.09%	$137.00

Values in Million USD

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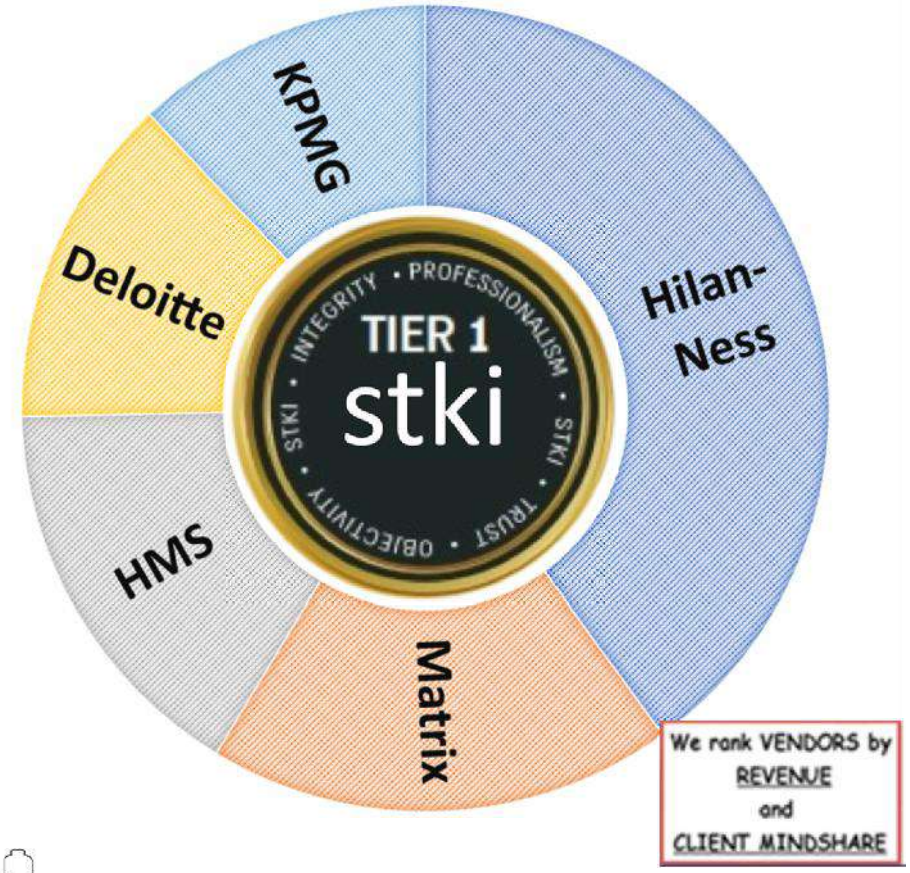
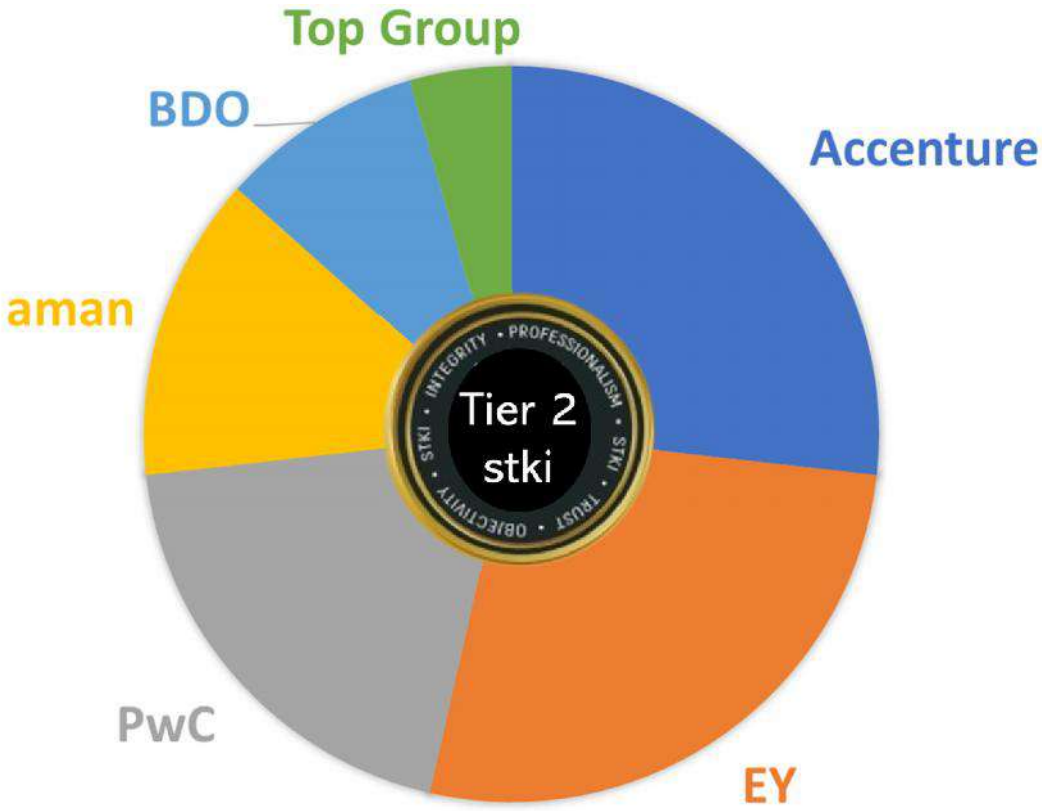
value added services market

Regulation Projects

294





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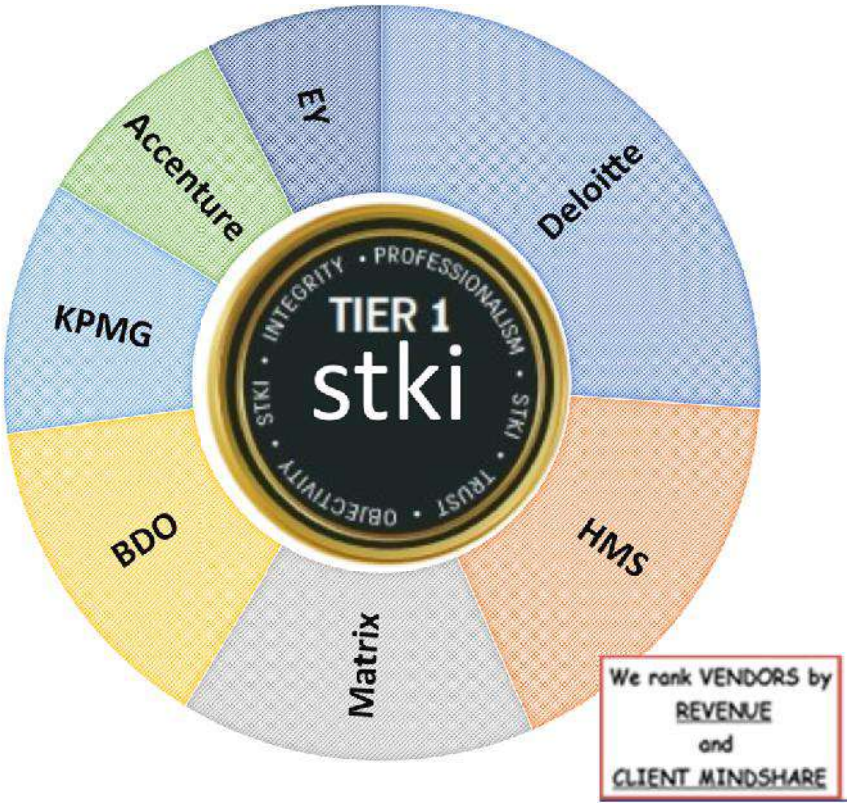
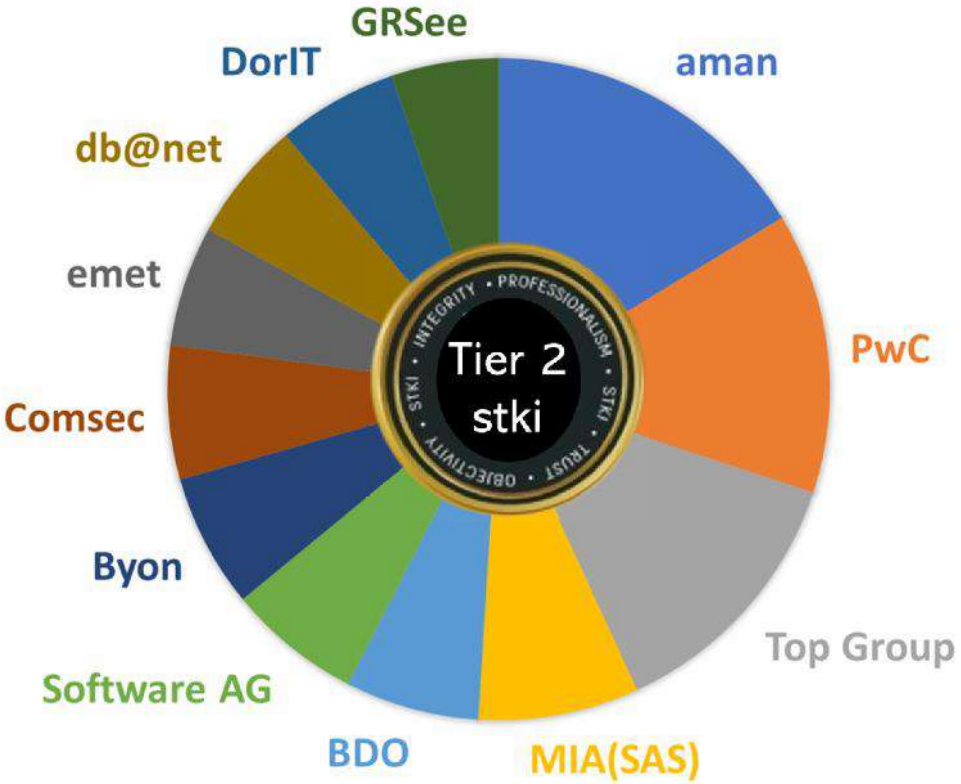
Auditing, Governance & Risk Management 295





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OUTSOURCING & MANAGED SERVICES MARKET 2018-2022

296

	2018		2019		2020		2021		2022
Complete and/or application outsourcing (Client owns the HW)	$140.00	1.43%	$142.00	2.11%	$145.00	4.83%	$152.00	18.42%	$180.00
Infrastructure Outsourcing (infrastructure, storage mngt, DBA services)	$110.00	1.82%	$112.00	7.14%	$120.00	6.67%	$128.00	4.69%	$134.00
Call Centers/Help Desk Outsourcing Services	$82.00	3.66%	$85.00	29.41%	$110.00	27.27%	$140.00	7.14%	$150.00
Cyber security managed services - CISO as a service, etc. (excluding SIEM service)	$27.00	14.81%	$31.00	67.74%	$52.00	34.62%	$70.00	21.43%	$85.00
SIEM as a Service	$3.00	16.67%	$3.50	185.71%	$10.00	50.00%	$15.00	33.33%	$20.00
Printing Outsourcing Services (pay per click)	$58.00	12.07%	$65.00	-46.15%	$35.00	20.00%	$42.00	19.05%	$50.00
Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)	$145.00	10.34%	$160.00	15.63%	$185.00	12.43%	$208.00	5.77%	$220.00
Near shore	$115.00	17.39%	**$135.00**	-25.93%	$100.00	50.00%	$150.00	16.67%	$175.00
Off shore	$45.00	33.33%	**$60.00**	-8.33%	$55.00	54.55%	$85.00	5.88%	$90.00
Staff Augmentation (gulgalot)	$200.00	-7.50%	**$185.00**	-18.92%	$150.00	20.00%	$180.00	5.56%	$190.00
TOTALS	$925.00	5.78%	$978.50	-1.69%	$962.00	21.62%	$1,170.00	10.60%	$1,294.00

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Values in Million USD

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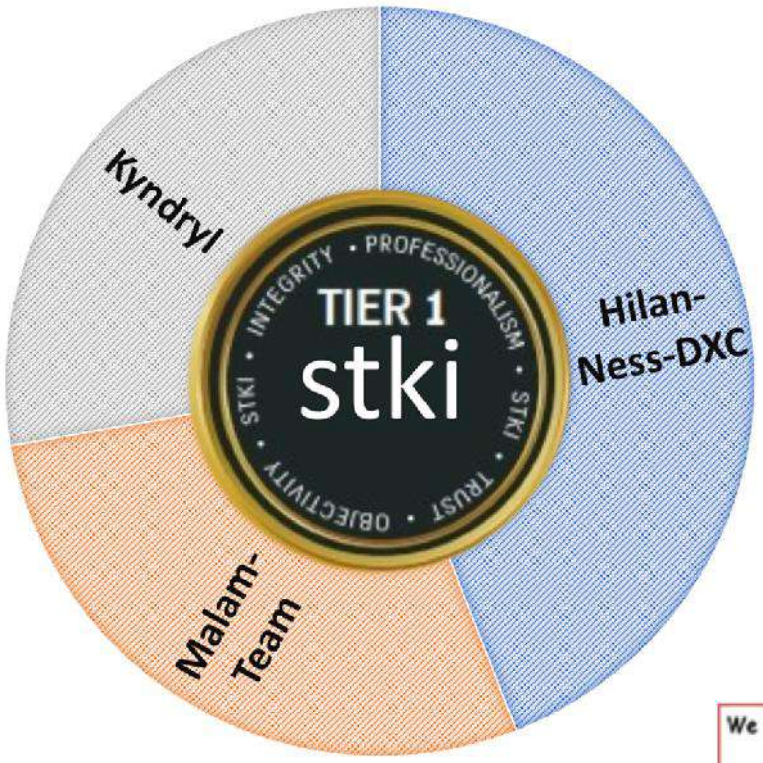
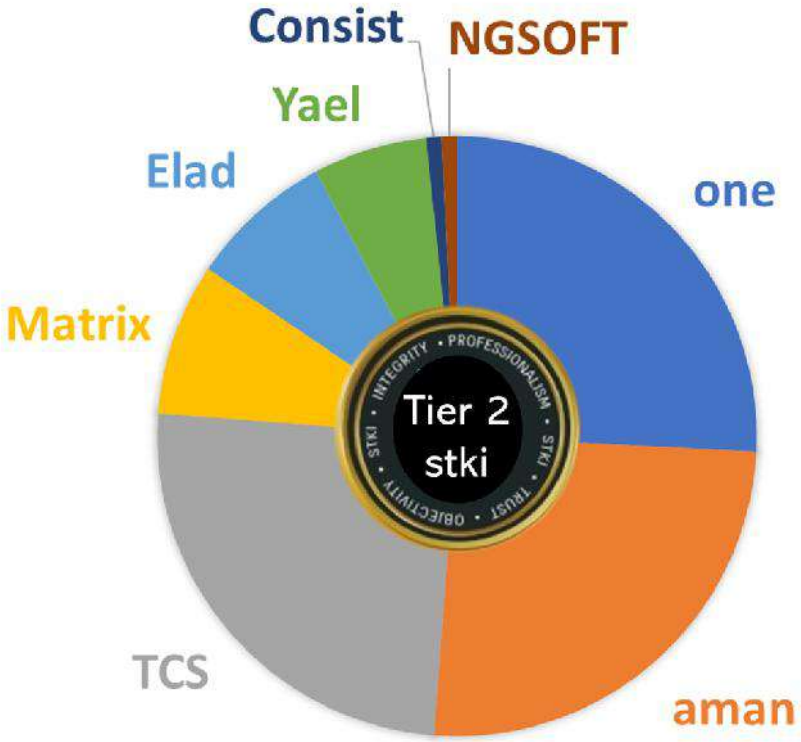
value added services market

Complete and/or Application Outsourcing (client owns the HW)

297



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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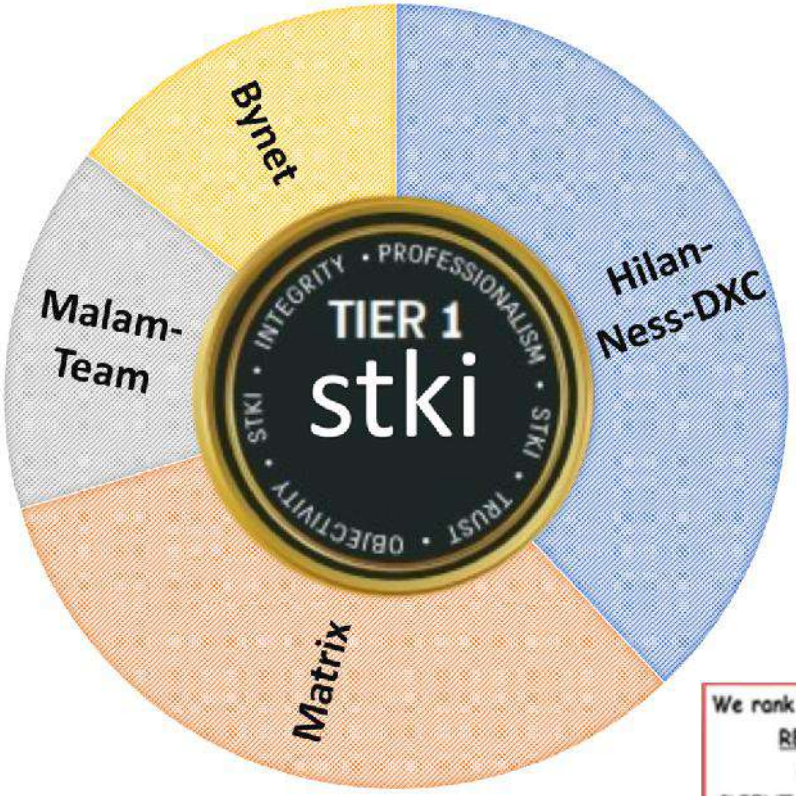
value added services market

Infrastructure Outsourcing (infrastructure, Storage mngt, DBA services)

298



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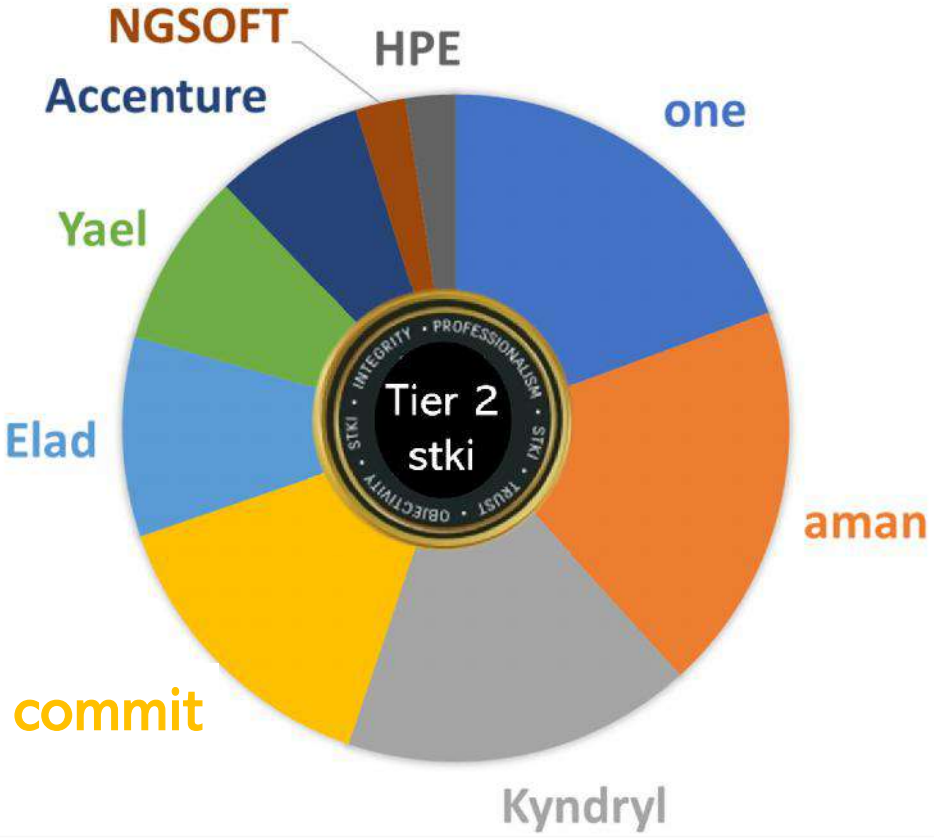

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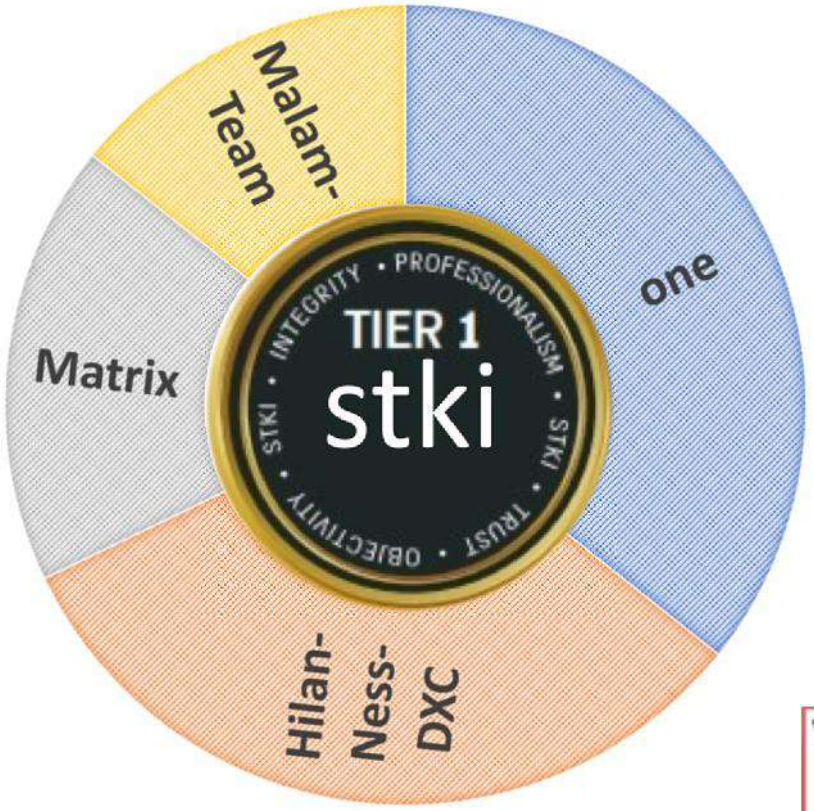
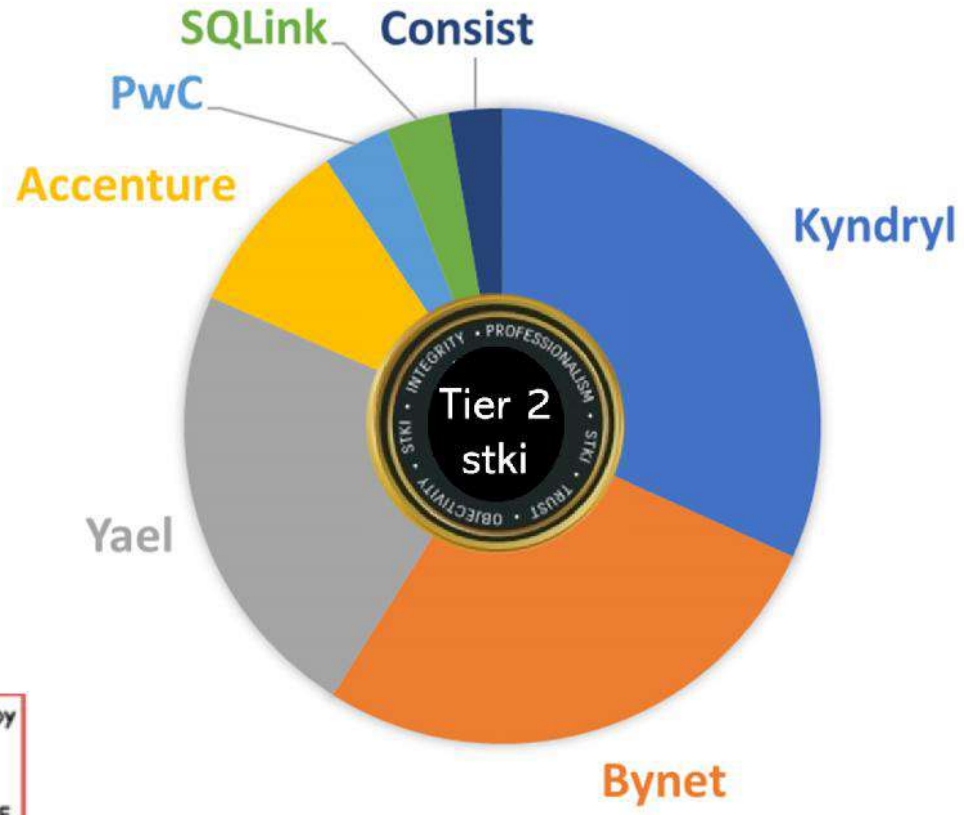
value added services market

Call Centers/Help Desk Outsourcing Services 299





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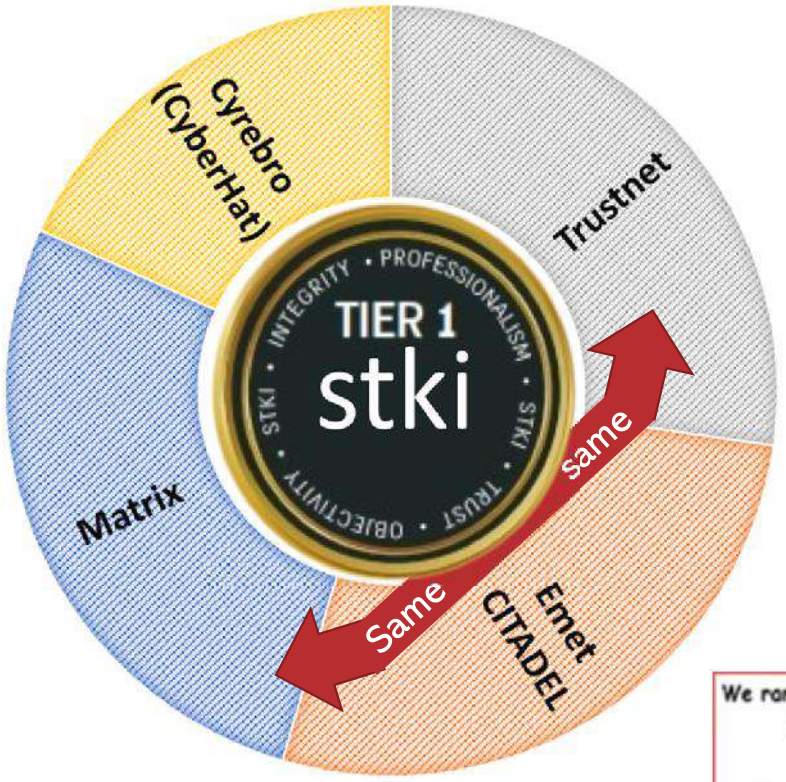
value added services market

SIEM as a Service

300



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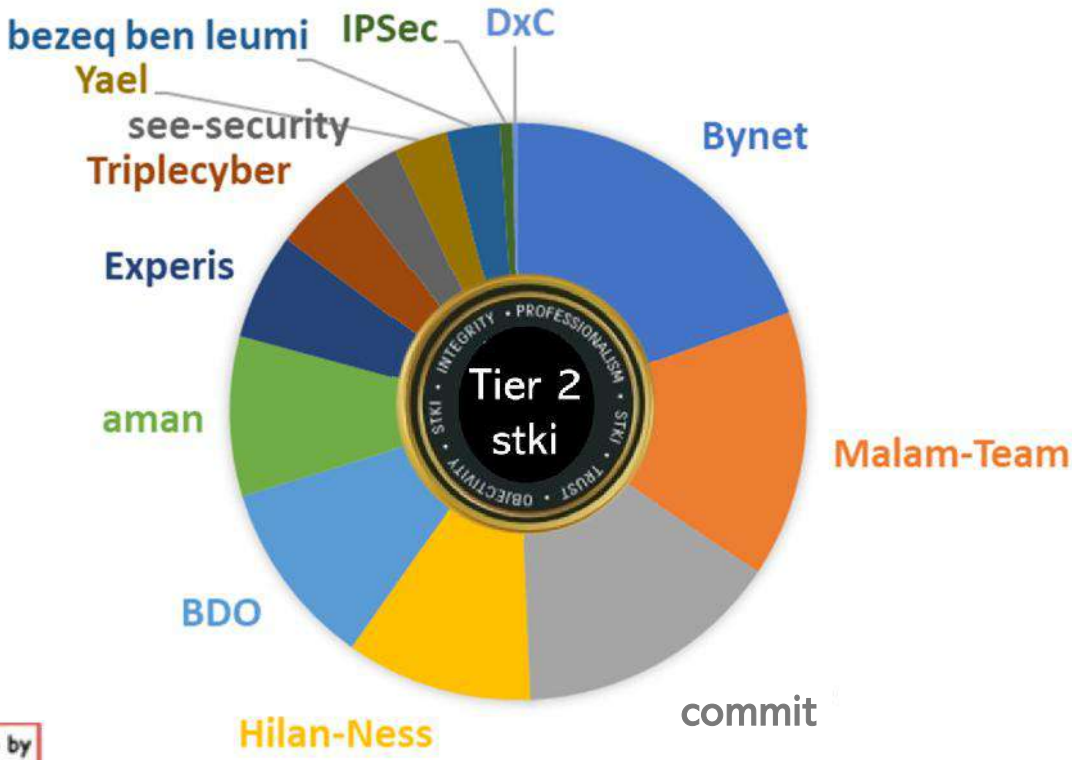

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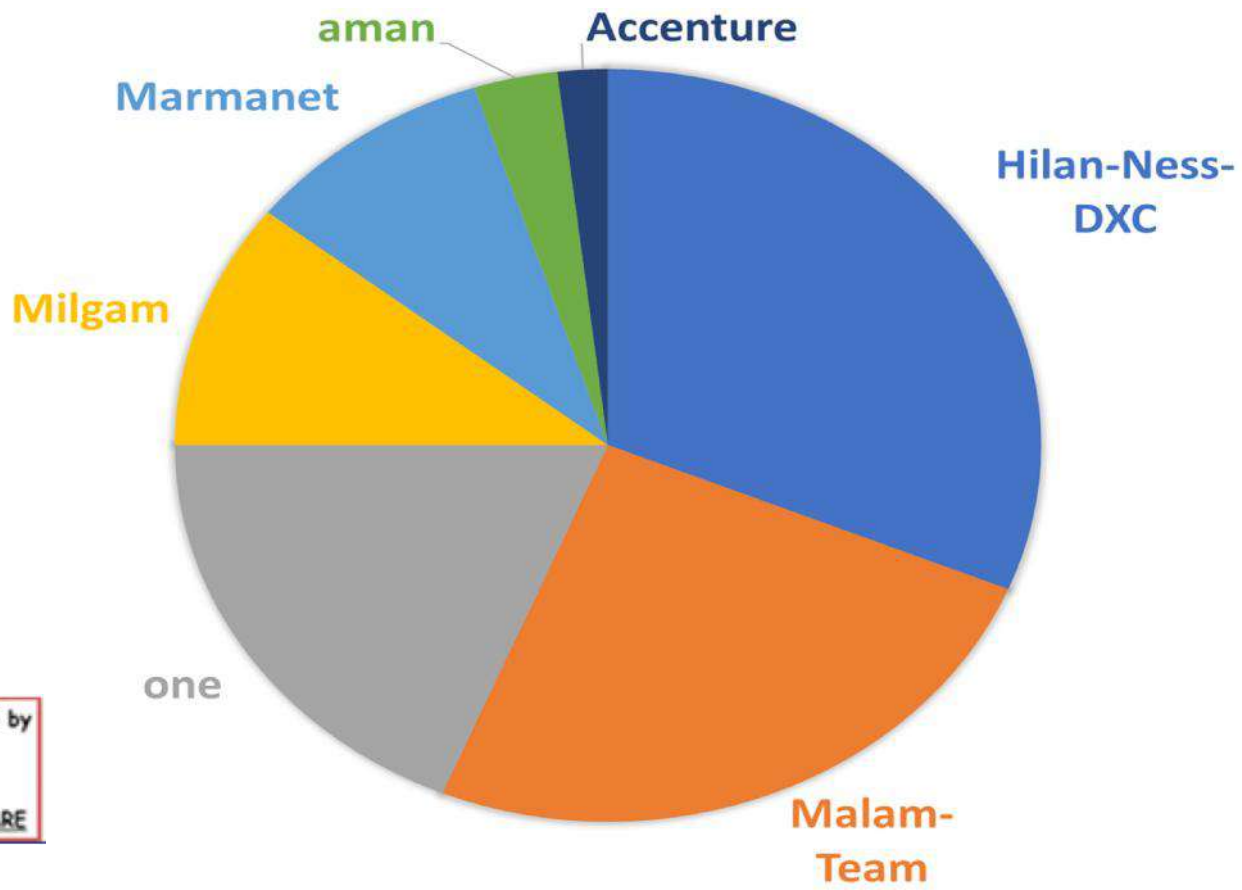
value added services market

Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)

301



We rank VENDORS by REVENUE and CLIENT MINDSHARE

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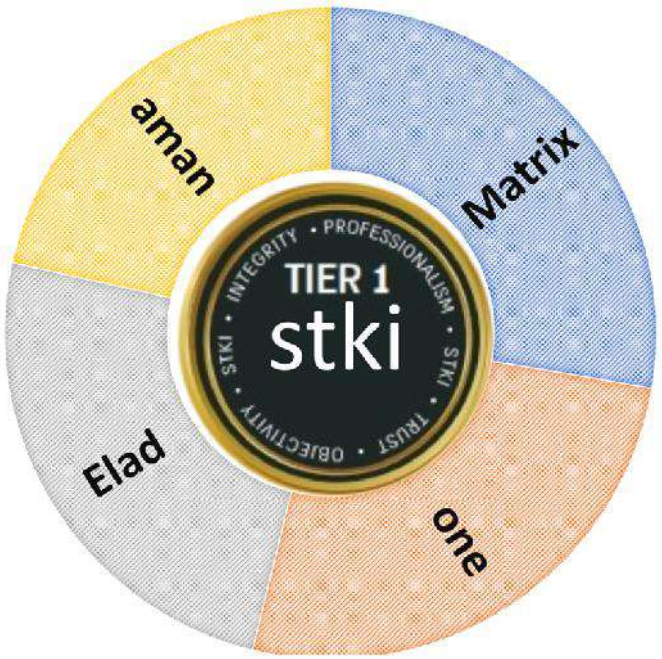
value added services market

Sourcing (Near Shore) 302



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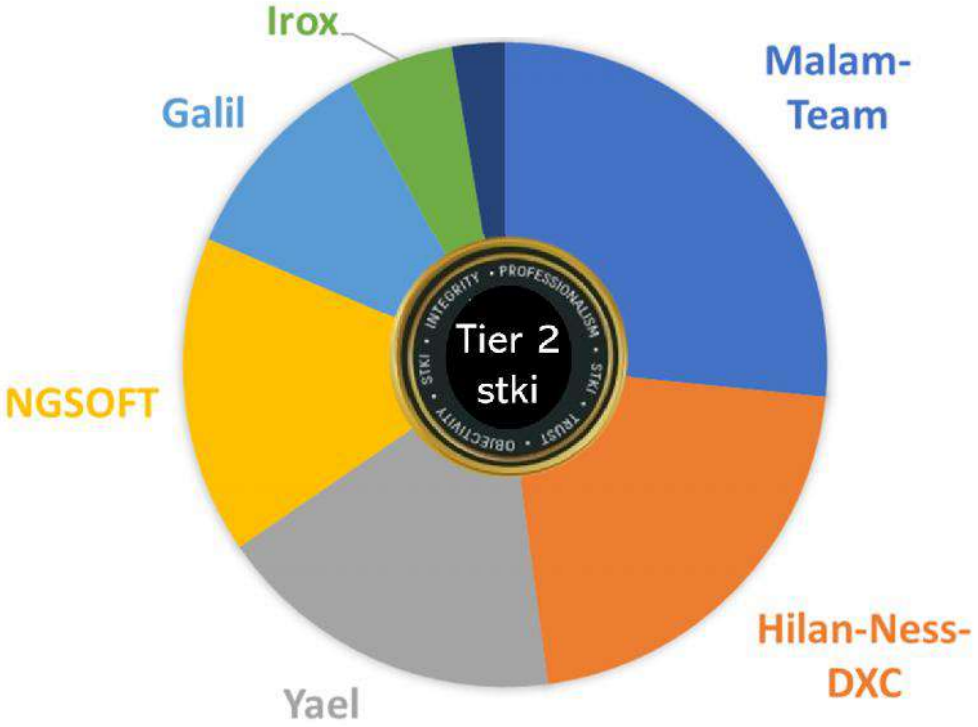

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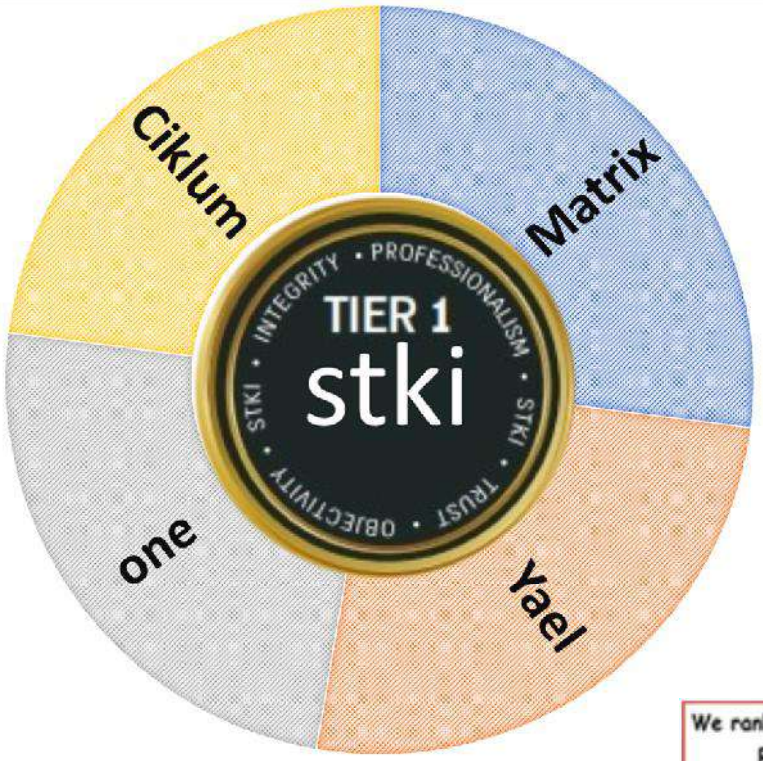
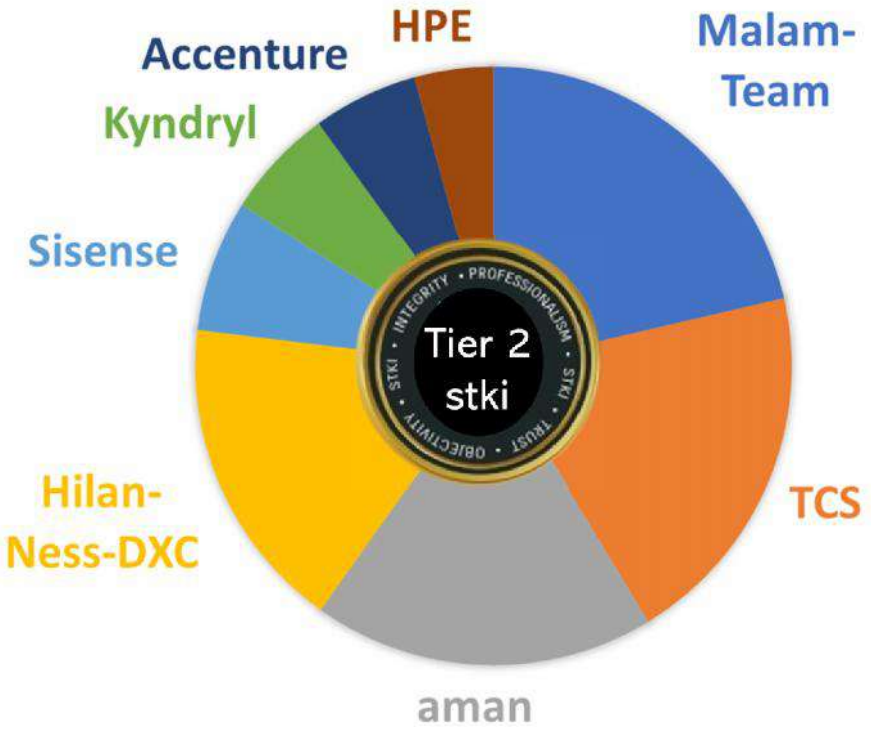
Sourcing (offshore)

303





We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

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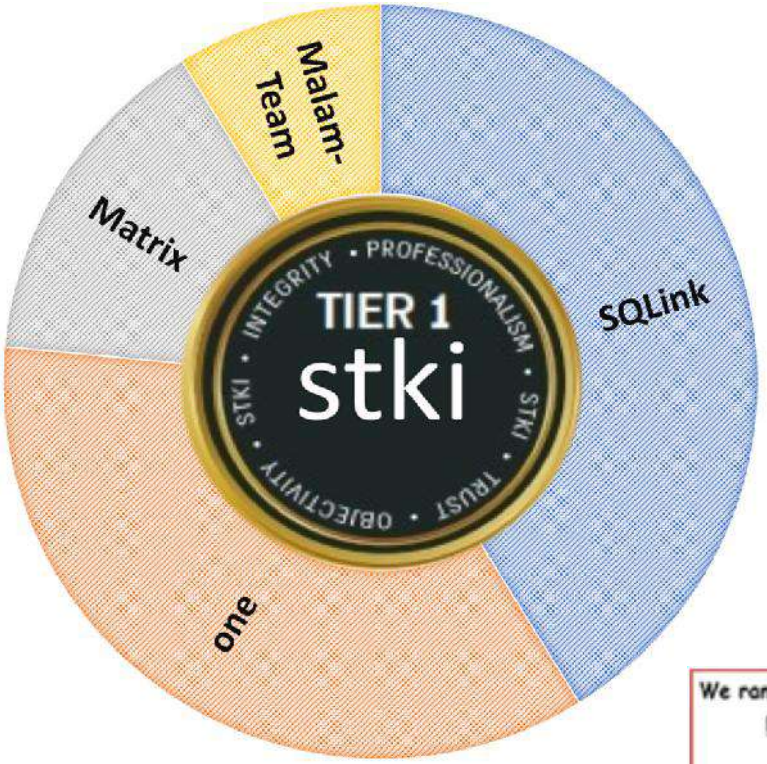
value added services market

Sourcing (Staff Augmentation (gulgalot)) 304



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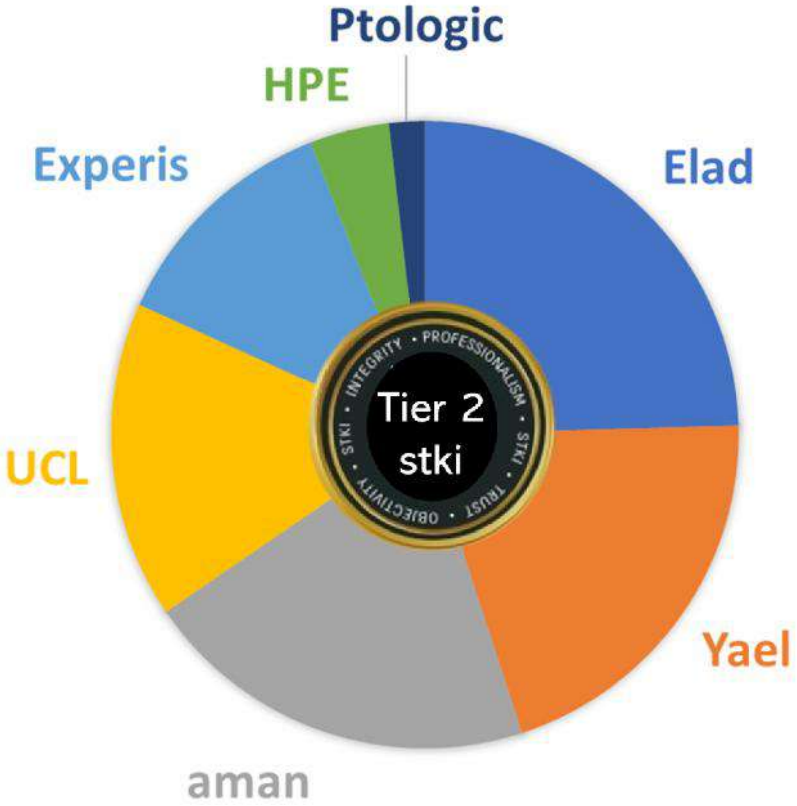

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"OTHER" PROJECTS MARKET 2018-2022

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	2018		2019		2020		2021		2022
Location Based Projects	$50.00	30.00%	$65.00	23.08%	$80.00	12.50%	$90.00	5.56%	$95.00
Self-Service Projects	$20.00	25.00%	$25.00	0.00%	$25.00	40.00%	$35.00	42.86%	$50.00
Tele-medicine Projects	$5.00	50.00%	$7.50	100.00%	$15.00	66.67%	$25.00	60.00%	$40.00
Other.....	$75.00	0.00%	$75.00	-60.00%	$30.00	66.67%	$50.00	10.00%	$55.00
TOTALS	$150.00	15.00%	$172.50	-13.04%	$150.00	33.33%	$200.00	20.00%	$240.00

Values in Million USD

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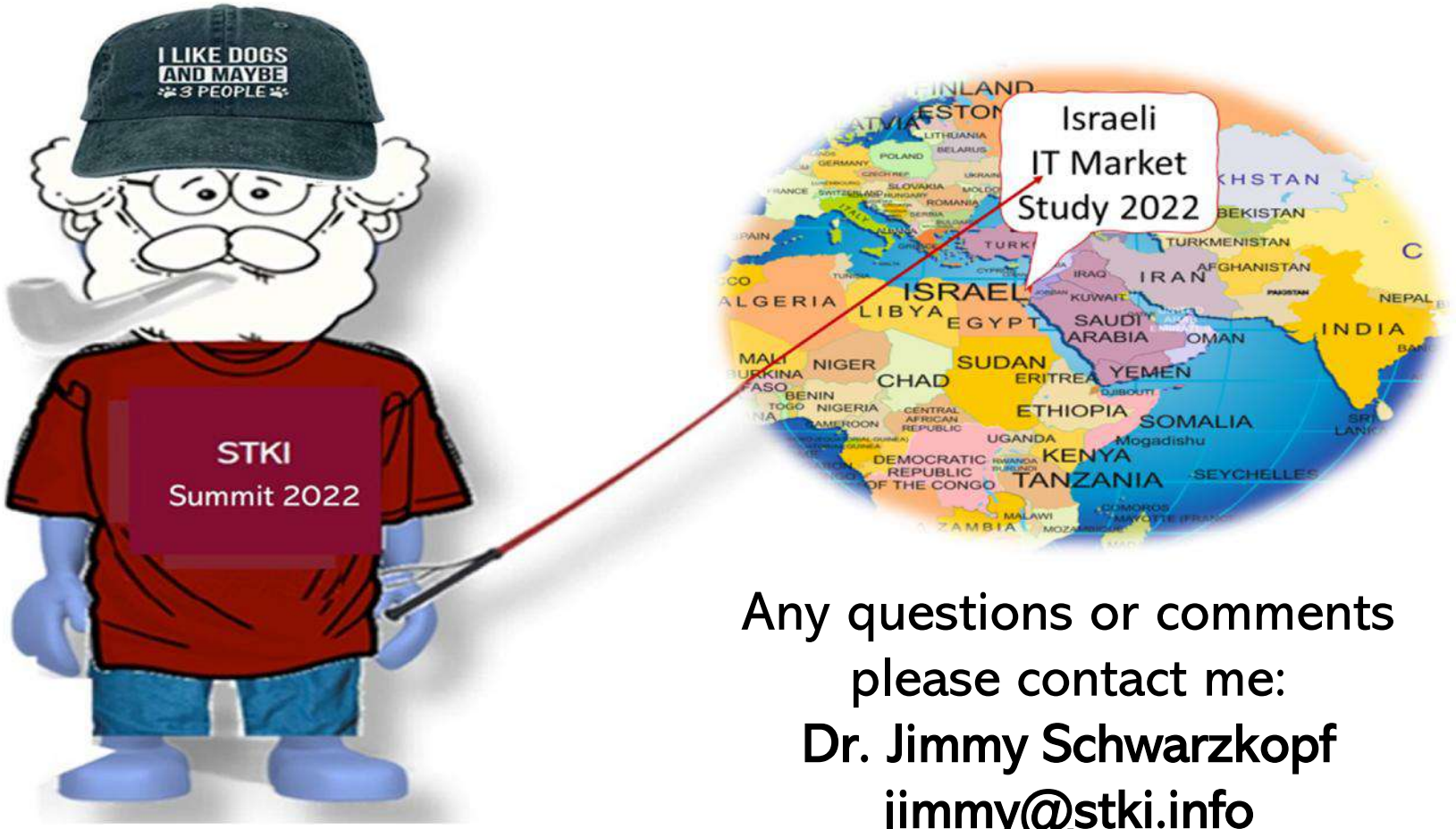

Any questions or comments
please contact me:

Dr. Jimmy Schwarzkopf
jimmy@stki.info
972 9 790 7000

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Dr. Jimmy Schwarzkopf, Research Fellow , STKI

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- Dr. Schwarzkopf has worked during the last 40 years in all areas of Computer Information Services:
  - As an Industry Analyst at META Group (Israeli Research Manager) and was named a META Group Research Fellow.
  - As an academic researcher in Entrepreneurship Sciences; has published and presented in several international IT and Management Conferences
  - Editorial Board Member of the academic journal "International Journal of Opportunity, Growth and Value Creation".
  - As a consultant in Arthur Andersen Consulting (USA), Booz Allen (USA) and Kesselman & Kesselman (Israel)
  - As a systems professional in SCS Computers and the R&D Unit of the Israel Defense Forces.
  - As a marketing professional in Digital Equipment Corporation.
  - As a teacher/mentor in the MIS department / Tel-Aviv Yafo Academic College and the Computer School of the IDF.
  - As an entrepreneur founding three companies in the IT arena: STKI and companies in the areas of store/forward mail and office systems.

- Dr. Schwarzkopf served on the Board of Directors of Ashot Ashkelon Industries, served as President of the Gymnasia Herzelia Association, Co-founder of the Mashov Political Movement and was a member of the Central Committee of the Labor Party. Major (Rav-Seren) in the reserves, Israel Defense Forces (where he served in an elite unit and later in the R&D unit). Registered Engineer (IS22881), member of MENSA Israel.

- Dr. Schwarzkopf received BSE and MSE degrees (Systems Engineering) from the University of Central Florida. Received an MSIA (Management Information Systems) and ABD (PhD Program) in Systems Science (received (twice) the William Larimer Mellon Scholarship/Award) from Carnegie Mellon University. His doctorate (DBA Entrepreneurship) he received from Weatherhead School of Management at Case Western Reserve University

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