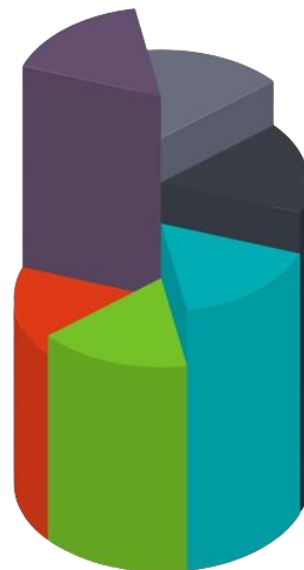




# Data & AI state of the market in Israel STKI study 2024



by Einat Shimoni @ STKI



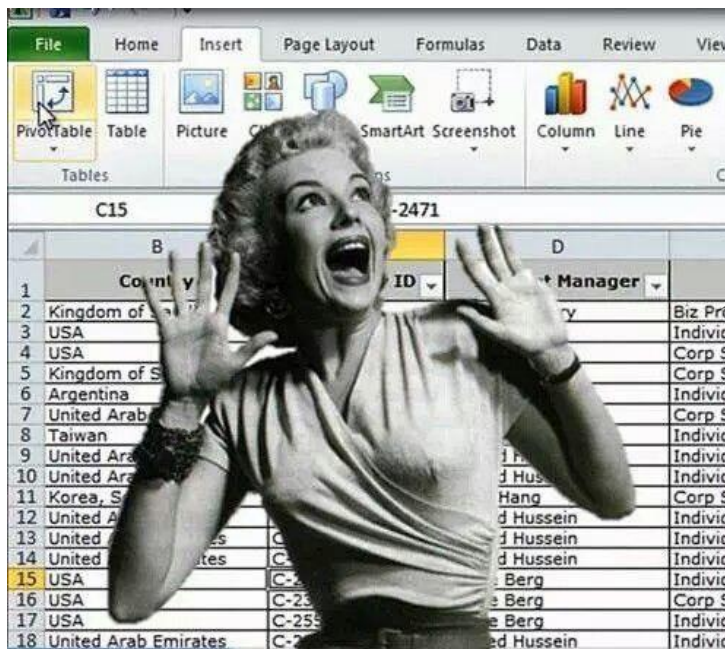
# 2024 market study recap:

# #1



# 2024 market study recap:

# #2



Where is my AI assistant?



2024 market study recap:

#3

We are  
focusing  
on the cool  
things



...not the  
“boring”  
*but important*  
ones



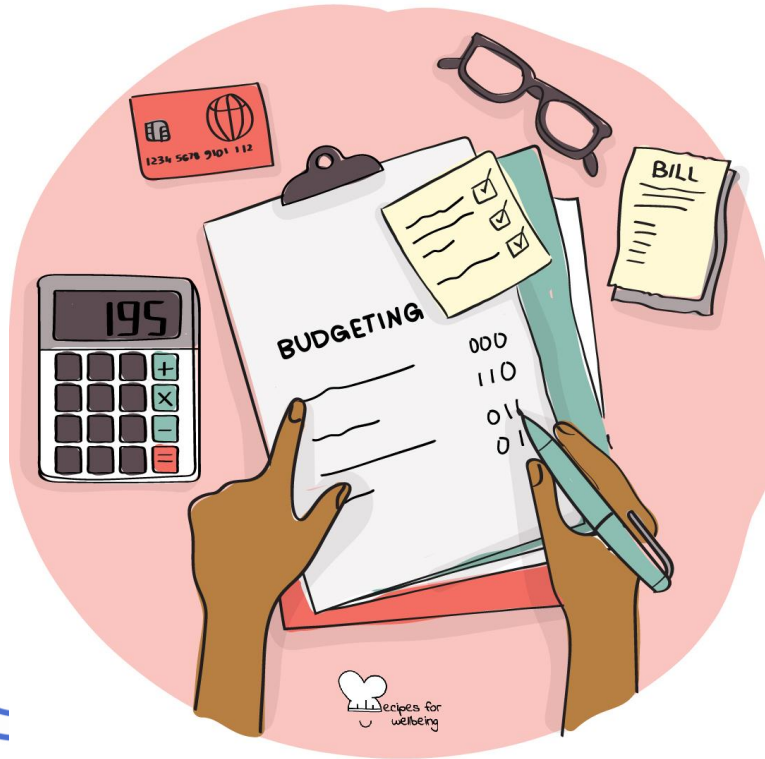
# The questions we're NOT asked

- Data Governance
- Data quality
- Ongoing “maintenance” of models
- Policies
- Responsible AI
- AI FinOps
- ROI measurement



# 2024 market study recap:

# #4



**"GOVERNMENT & DEFENSE"**  
*are the new*  
**"FINANCIAL SERVICES"**





## Government and Security up

Industry	Change from 23	Budget 2024
government	8.33%	\$1,950
security	20.00%	\$900
education	2.22%	\$460



Almost everything else down



Industry	Change from 23	Budget 2024
health	-1.09%	\$455
utilities	-4.76%	\$200
transport	-3.77%	\$510
banks	-3.30%	\$880
insurance	-3.33%	\$435
fin other	-5.36%	\$530
manuf	-2.45%	\$795
retail	6.67%	\$320
high tech	-6.06%	\$1,550
IT local vendors	-6.98%	\$160
telecomm	-7.50%	\$185
media	-8.51%	\$215
SMB/SME	-4.44%	\$430

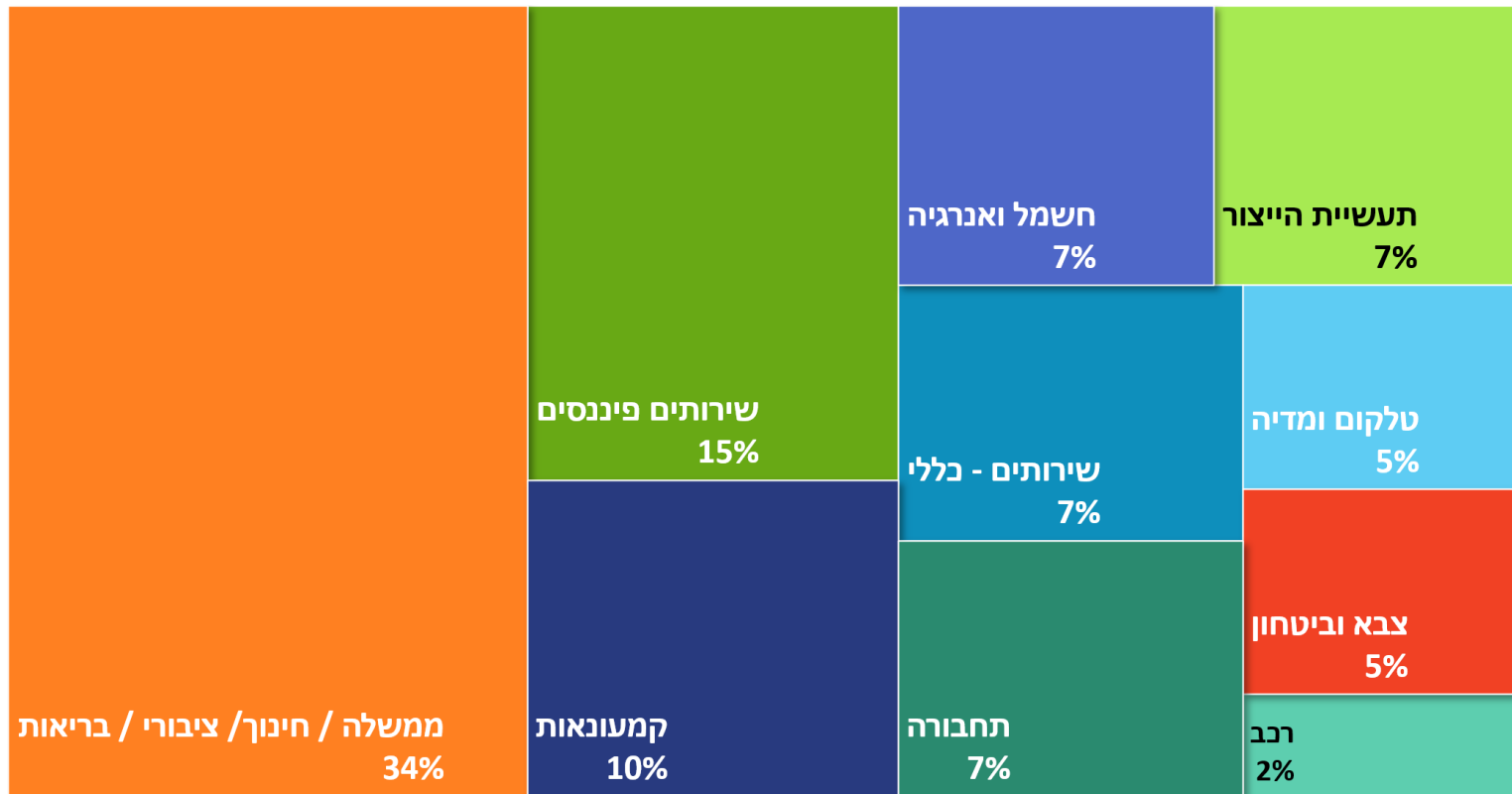


Source: Israel IT Study 2024  
by Dr. Jimmy Schwarzkopf





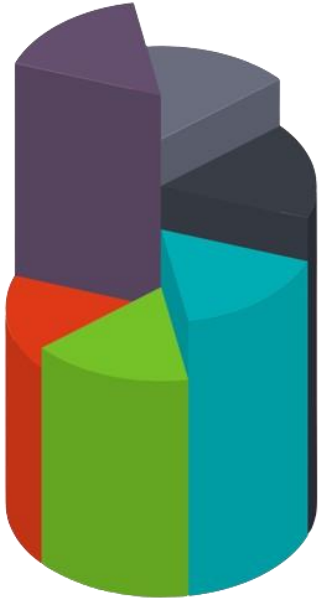
# דמוגרפיה – מחלאי סקר GenAI :



# Generative AI market study in Israel



State of GenAI in Israel  
STKI 2024





State of Generative AI Implementation Efforts	2024	2024
Experimentation and Testing Stage	60.4%	58%
Implemented in Limited Production	24.5%	20%
Planning and Design stage	6.6%	18%
Implemented in Production At Scale	4.7%	2%
Not In Use	3.8%	2%

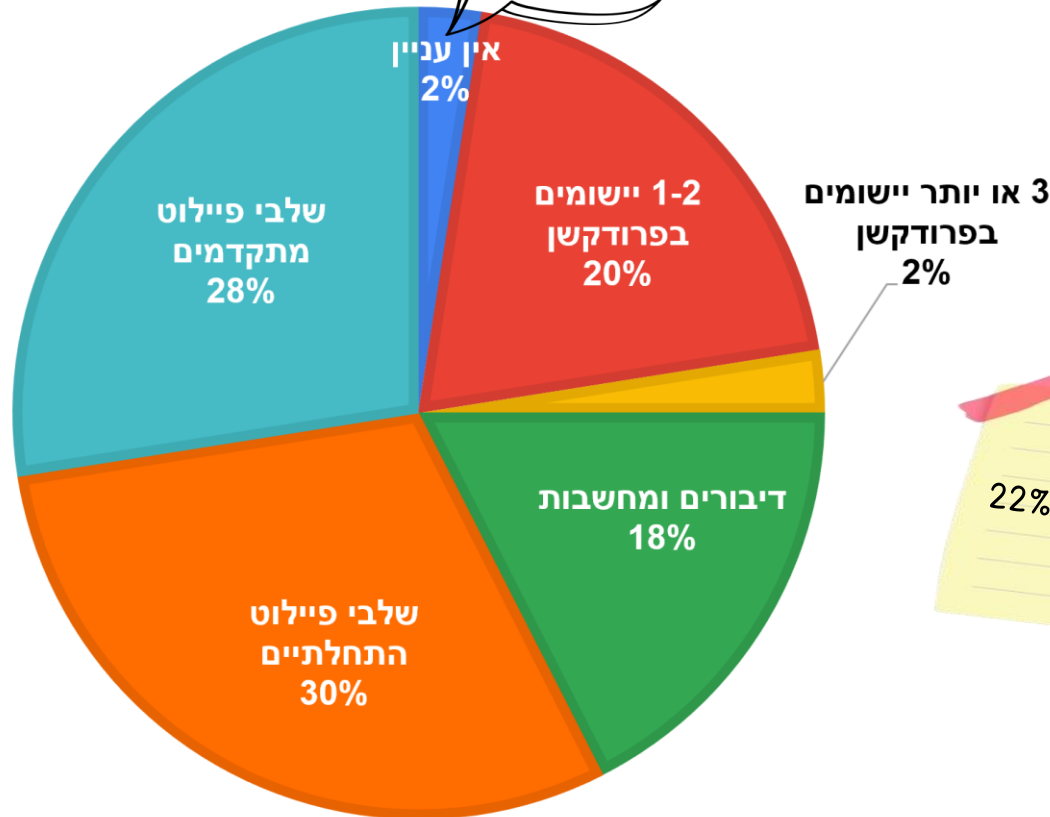
Source: NewVantage Partners 2024

Source: STKI State of GenAI in Israel 2024



# מצב אימוץ GenAI:

WHO ARE YOU?



58% piloting

22% in production





## מי בארגון אמון על נושא ה GenAI והכנסתו לארגון?

46%

יחידת  
הטכנולוגיה

24%

יחידת הדאטה

17%

יחידת  
החדשנות /  
הדיגיטל

9%

אין גוף כזה  
כיום

4%

משאבי אנוש  
והדרכה

Dynamic and  
still evolving



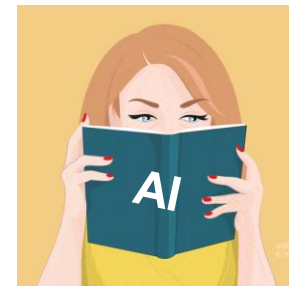


61%  
לא קיימת  
מדיניות

33%  
קיימת  
מדיניות

6%  
לא ידוע לי

האם קיימת מדיניות ליישום  
GenAI בארגון?



# האם קיימת תכנית הדרכה לשימוש העובדים ב-GenAI בארגון?

45%

לא קיימת בכלל

42%

חלקית – סדנאות  
לחלק מהעובדים

8%

כן, לכל העובדים

5%

לא ידוע





# I RECOMMEND

---

Draft an organizational **policy** now  
("done is better than perfect")

Invest in **training**, awareness,  
literacy and encourage personal  
use

# WHY

---

Employees are using it  
anyway

It's the only way to  
understand the  
technology and its uses

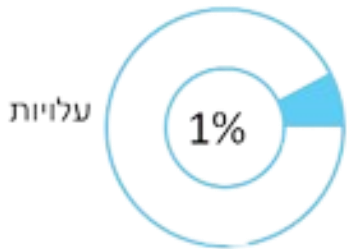
Because employees don't  
expect you to





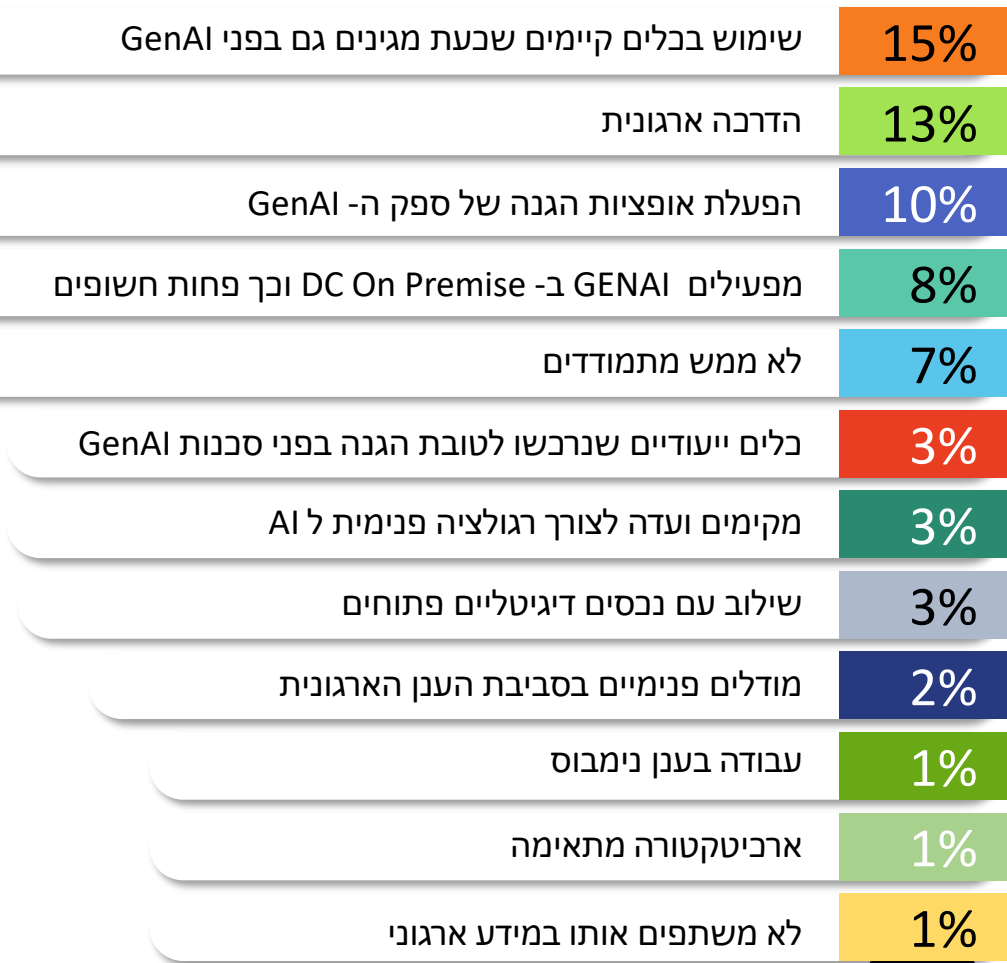
# סיכונים עיקריים:

TOP 3





## כיצד הנכם מתמודדים עם סיכוני GenAI בארגון?





ענן

72%

עדיין לא ידוע

23%

On Premise

5%

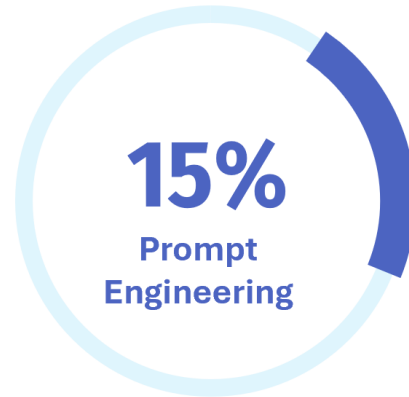




## שיטת הקסטומיזציה של מודלי GenAI



But RAG is  
not perfect!



# RAG limitations

**Organization Matters:** The performance and effectiveness of RAG is heavily dependent on the organization and structure of the underlying data it is accessing. The ability for the retrieval algorithm to identify and surface the most useful documents is greatly influenced by how that information is cataloged and stored as well as how semantically similar the query is to the data retrieved.

43% ניתוח תמלולי שיחות והוצאת תובנות

40% code assistance קוד ופיתוח

35% DW/ Data Lake מעל שיחתי BI שכבת

33% צ'אטבוט שירות מול לקוחות

30% צ'אטבוט שירות מול נציגי שירות

25% צ'אטבוט לעובדים

23% סיכומי פגישות ודיונים

20% קטגוריזציה של תכנים (סקרים/ מסמכים...)

18% תקצירי מחקרים ועריכת מחקרים חדשים

10% Ideation – פיתוח עסקי ומוצרים חדשים

5% Q&A באתר האינטרנט

4% שיווק ומכירות - תוכן

So why is it the most common use case?

# מהם יישומי ה GenAI המעניינים ביותר לדעתך בשלב זה בארגון?



State of GenAI in Israel  
STKI 2024





# I RECOMMEND

---

Use these tools to prioritize use cases:

Impact/Feasibility Matrix



Ideation workshop



# WHY

---

Some organizations are now handling 50-60 requests for GenAI use cases.

The natural tendency is to focus on feasibility and less on impact

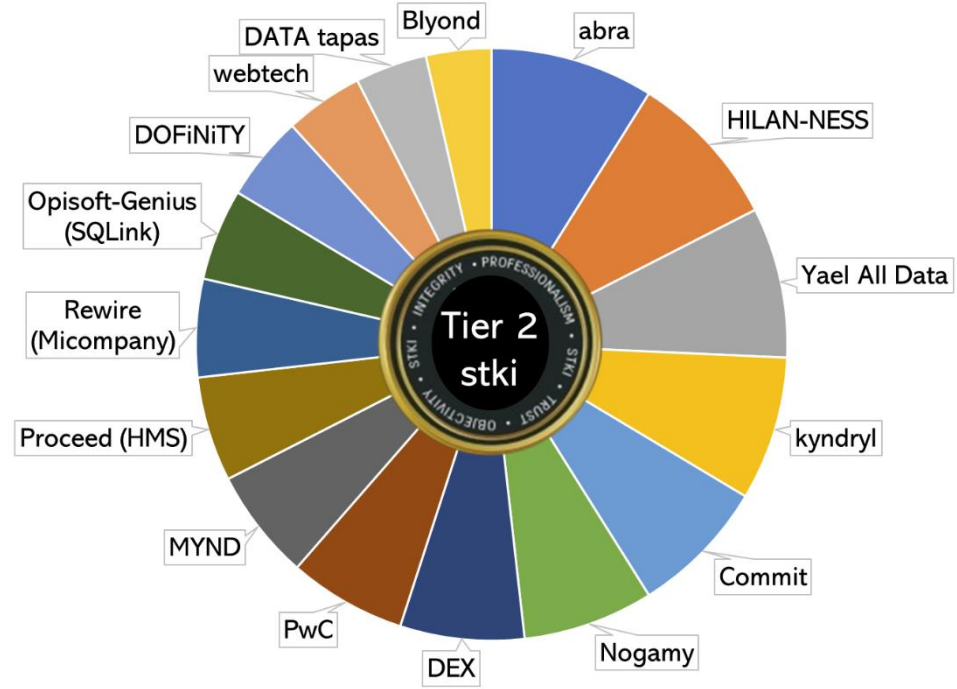
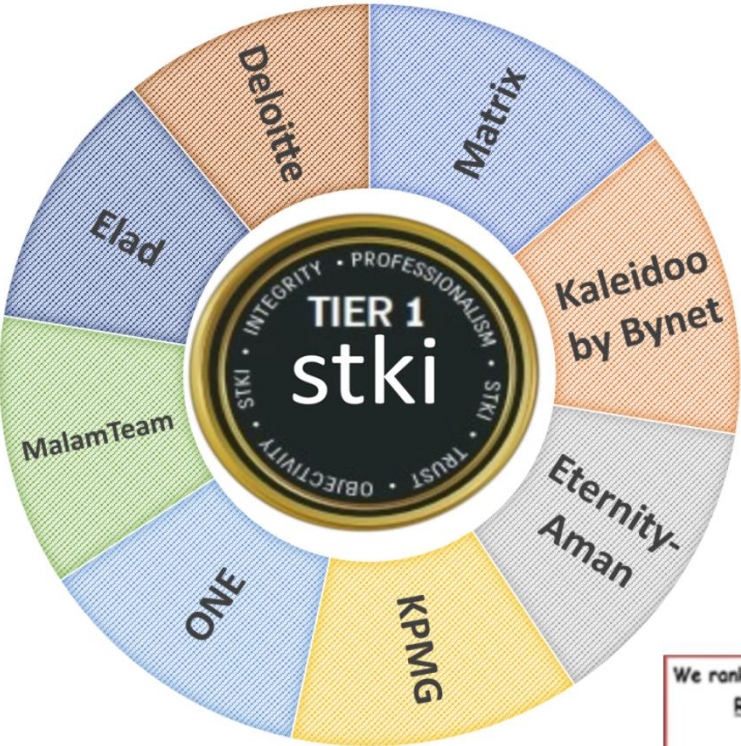
---

**Get outside help!** but remember that everyone's still learning



**NEW**

# GenerativeAI and LLM projects



We rank VENDORS by  
**REVENUE**  
and  
**CLIENT MINDSHARE**



# LLMs in Israel (partial list):

Product	Description	Rep/Partners in Israel
OpenAI's ChatGPT 4	LLM	All GenAI players
Microsoft Azure Open AI	LLM service	Microsoft Israel
Claude 3	Anthropic's LLM	Available via Amazon's Bedrock
Gemini	Multimodal LLM	Google Israel, SQLink, Kaleidoo by Bynet
Cohere	LLM	Partnership with Oracle
Granit	LLM foundation models	IBM Israel
Titan	Amazon's LLM	Amazon
Arctic	Snowflake's LLM	Snowflake

## Main Open Source LLMs used in Israel:

LLaMA 3	Meta's open source LLM	
Mixtral	Mistral's open source LLM	
Huggingface	Collaboration platform for Open source models, libraries and tools	



# GenAI solutions and platforms in Israel

Product	Description	Rep/Partners in Israel
Gekko	Platform for “low code” GenAI apps	one
Kal-Sense	SaaS “GenAI applications” for Chatbots, Media, Documents and Audio transcription	Kaleidoo by Bynet
Melingo	Hebrew text analysis, NLP	SQLink, Yael
Red Hat Openshift AI	LLMOps: LLM Management environment	Red Hat Israel
WatsonX.ai	Platform for training, validating, tuning and deploying AI models (ML and GenAI)	Nogamy, Matrix, one (Libi), Malam-Team, Aman-Eternity, ABP consultancy. Webtech, SQLink - Genius
Amazon’s Bedrock	Managed service for building GenAI apps	Amazon Israel Kyndryl
Databricks’ Mosaic	Creation and customization of GenAI models	Databricks Israel
Azure AI Studio	Development and deployment platform for GenAI applications	Microsoft Israel
Oracle’s OCI Generative AI	Managed service for GenAI access, development and fine tuning	Oracle Israel



# Packaged GenAI solutions: coming soon!





# How did **GenAI** impact data transformations?



# 2024 DATA AND AI LEADERSHIP EXECUTIVE SURVEY

## EXECUTIVE SUMMARY OF FINDINGS

The State of Data and AI in  
Leading Companies 2024

With a Foreword by Randy Bean  
and Thomas H. Davenport



Randy Bean



<https://www.wavestone.com/app/uploads/2023/12/DataAI-ExecutiveLeadershipSurveyFinalAsset.pdf>

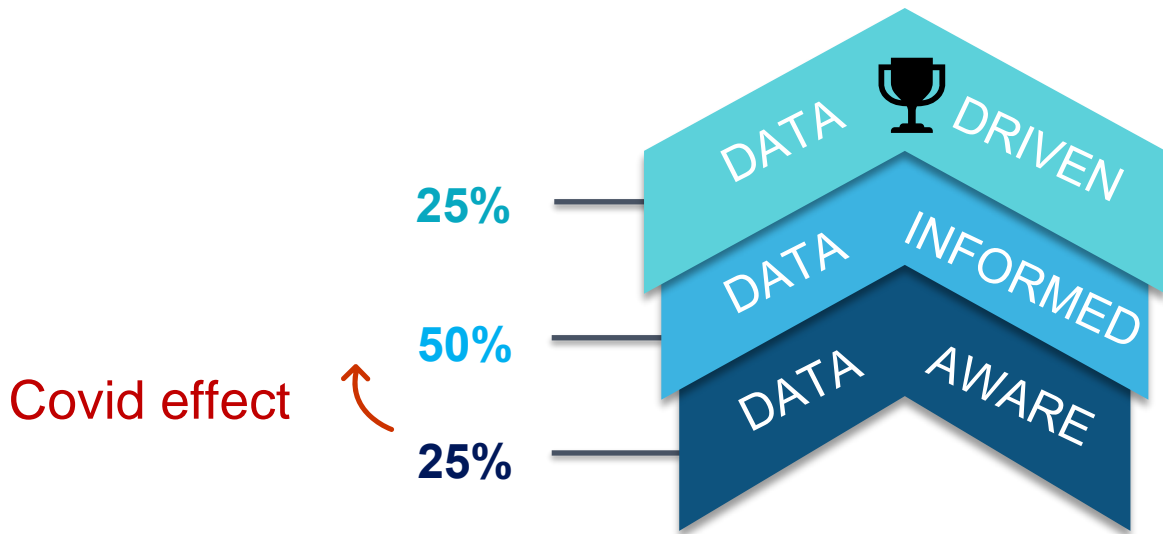
**STKI.INFO**

Copyright@STKI\_2024 Do not remove source or attribution from any slide, graph or portion of graph



# Once Upon a Time

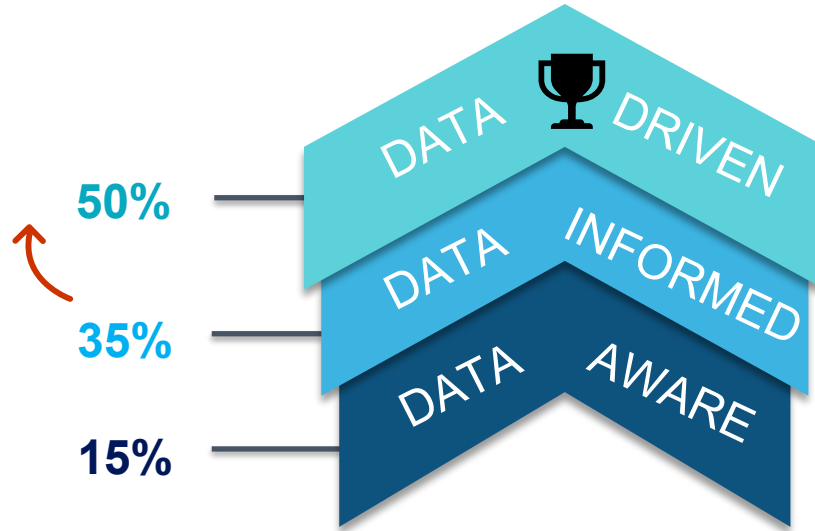
2022:



# 2024:



  
AI effect

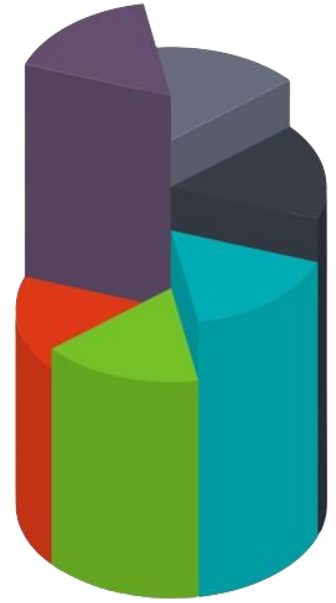


“We can think of no other reason for these improvements than the advent and visibility of **Generative AI**”

# Data & CDOs market study in Israel



State of Data in Israel  
STKI 2024



# Data units benchmarks





## \* Data staff as % of IT staff



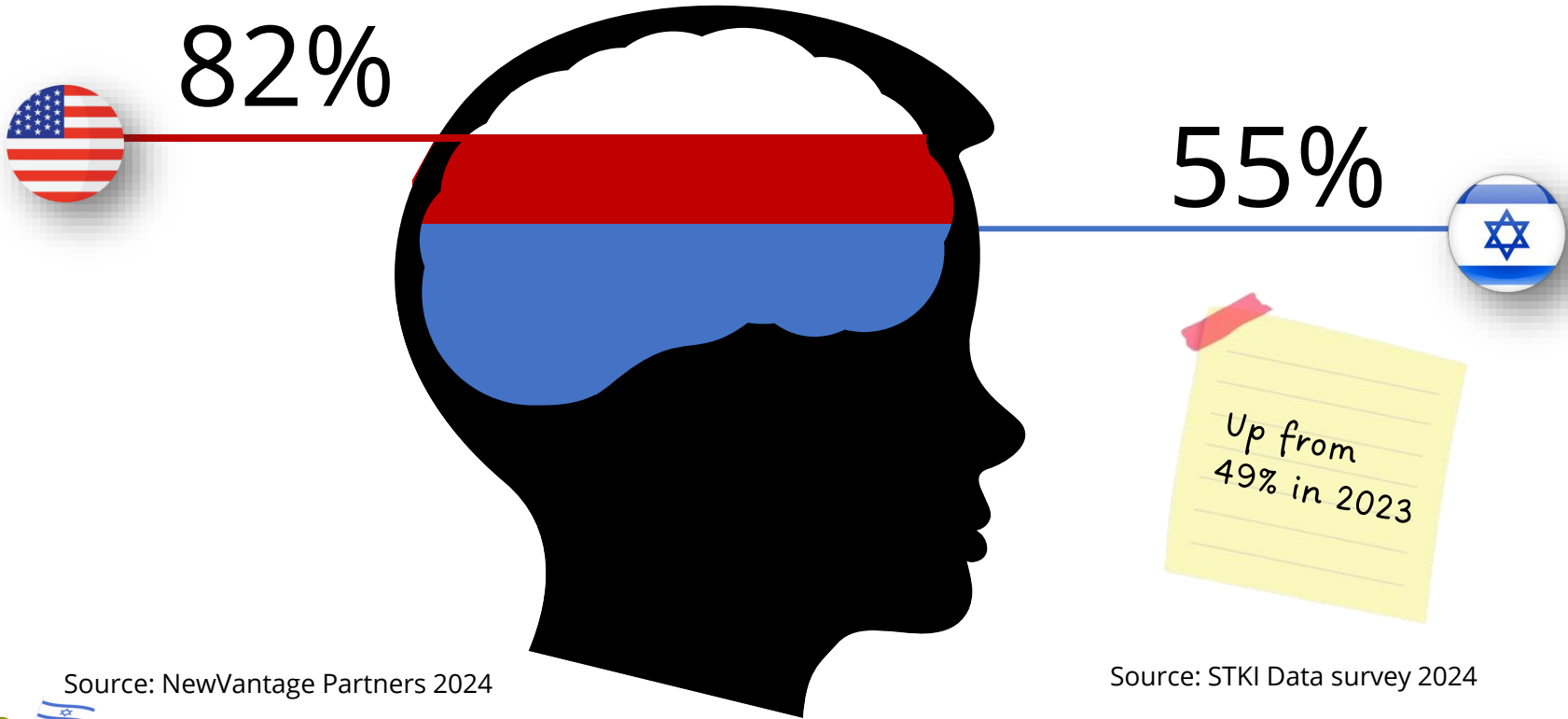
\* Analytical data staff, not transactional DBAs



## Data budget as % of total CAPEX budget



# How many **organizations** have a CDO (Chief Data Officer)?



Source: NewVantage Partners 2024

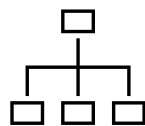
Source: STKI Data survey 2024





Israeli CDOs are analytical and execution-oriented

## היכן ממוקם ה-CDO בארגון?







## כמה אנשים במשרד ה-CDO?

ממוצע:

5  
אנשים



אנליסטים/  
Data Scientists

מנהל/ת  
משילות

מנהלי  
מוצרי דאטה



Israeli CDOs are offense-oriented. They prioritize innovation and value creation over defensive governance and risk mitigation

# היוזמות החשובות ביותר ל-CDOs

לקדם חדשנות בארגון באמצעות דאטה

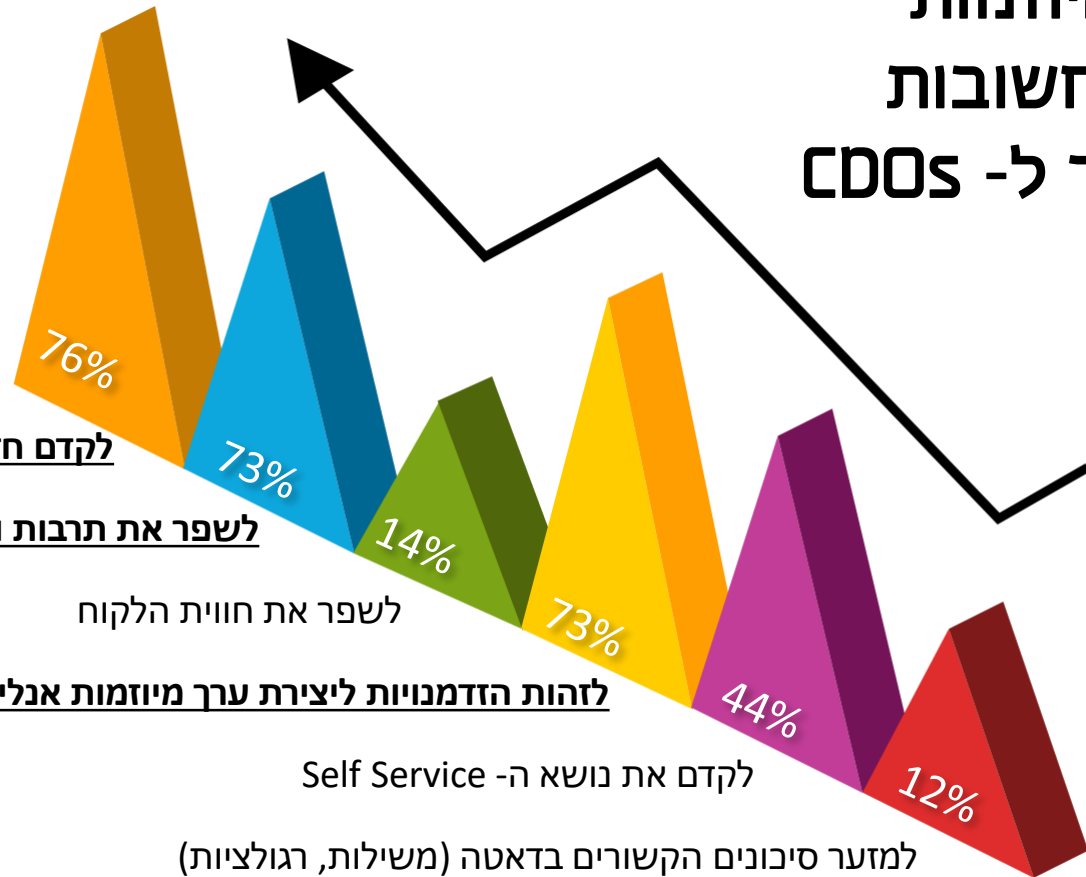
לשפר את תרבות ואוריינות הנתונים

לשפר את חווית הלקוח

לזהות הזדמנויות ליצירת ערך מיוזמות אנליטיות

לקדם את נושא ה-Self Service

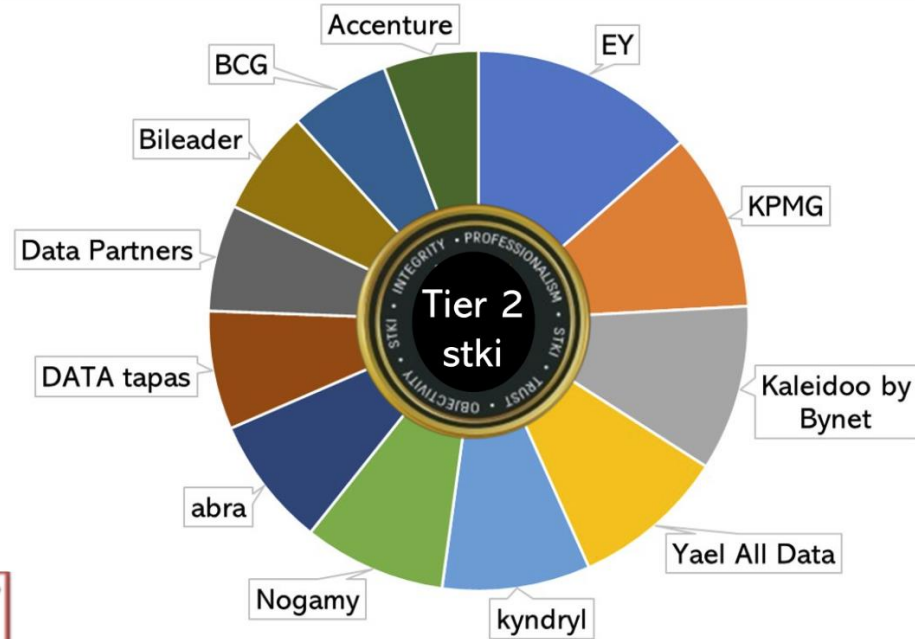
למזער סיכונים הקשורים בדאטה (משילות, רגולציות)





# Data & AI Strategy Consulting

(organizational, methodologies, architecture, use cases, culture, literacy)



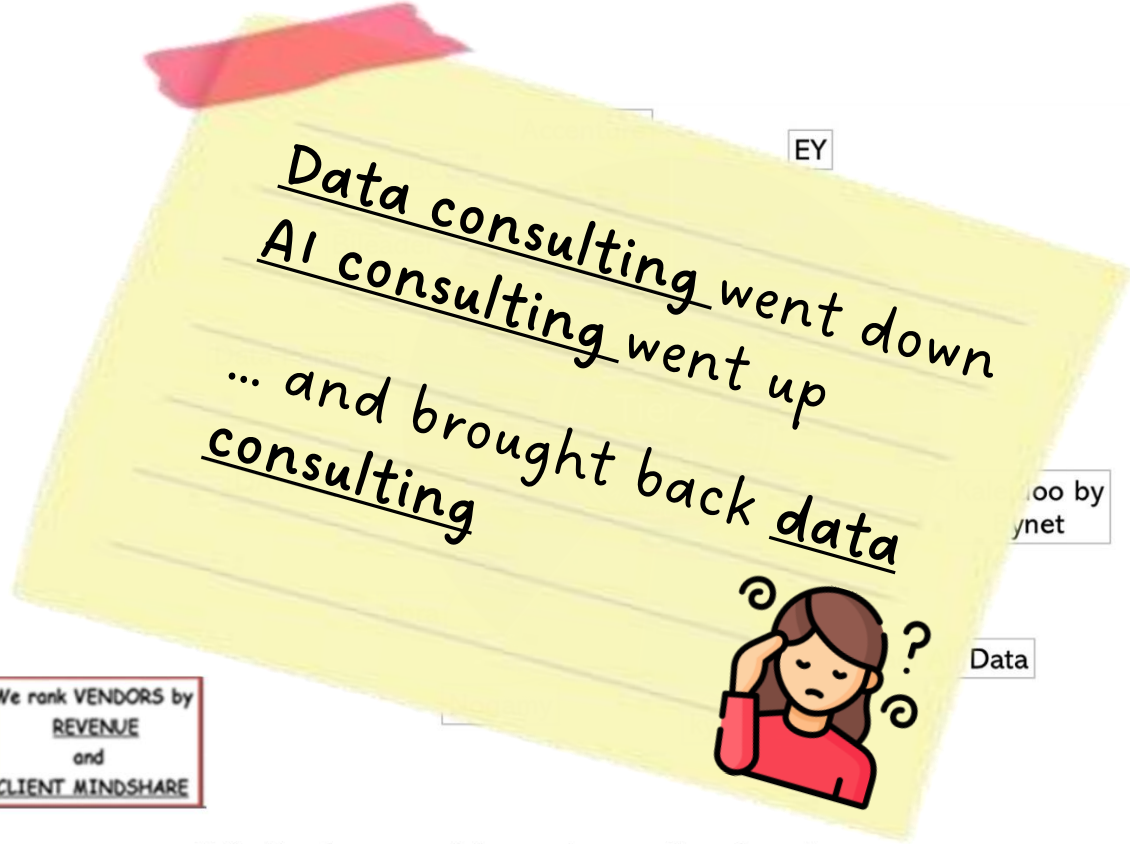
We rank VENDORS by  
REVENUE  
and  
CLIENT MINDSHARE





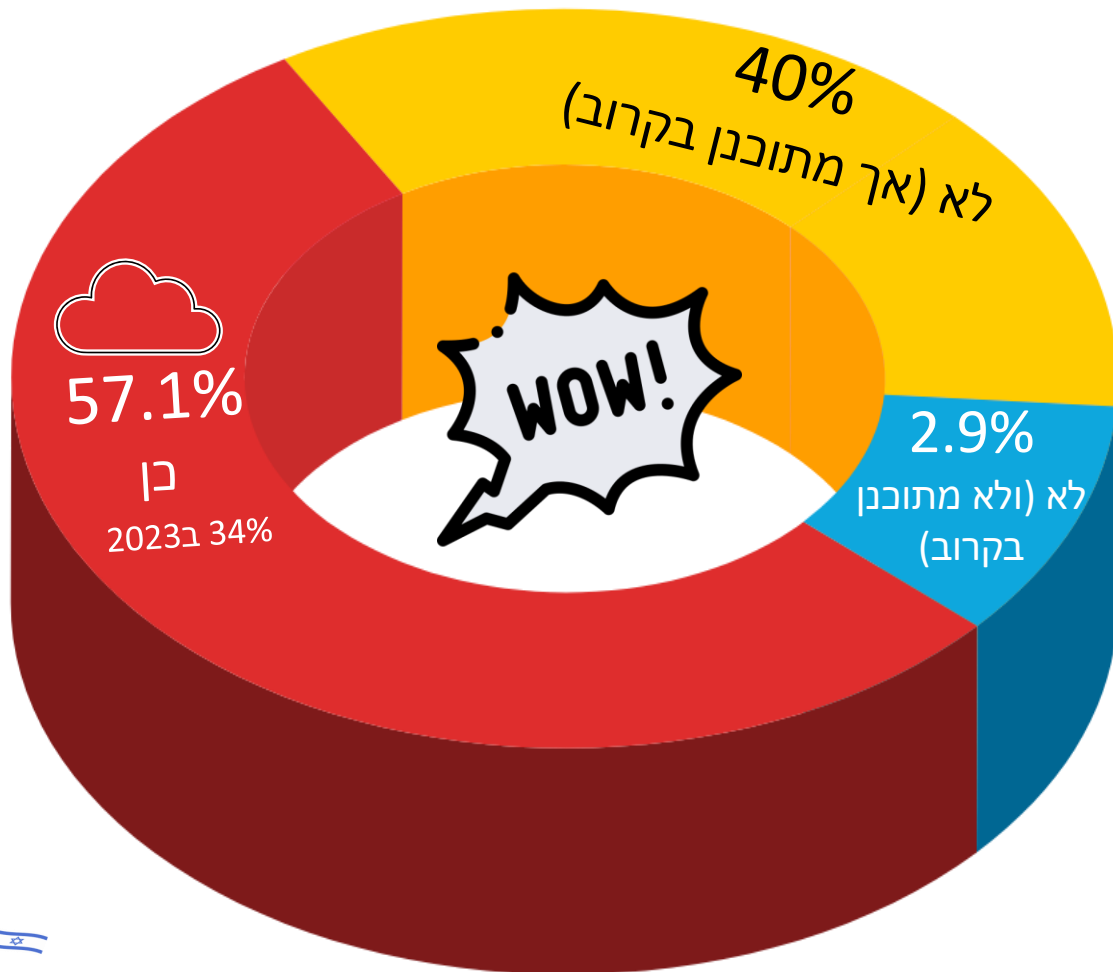
# Data & AI Strategy Consulting

(organizational, methodologies, architecture, use cases, culture, literacy)



We rank VENDORS by  
REVENUE  
and  
CLIENT MINDSHARE





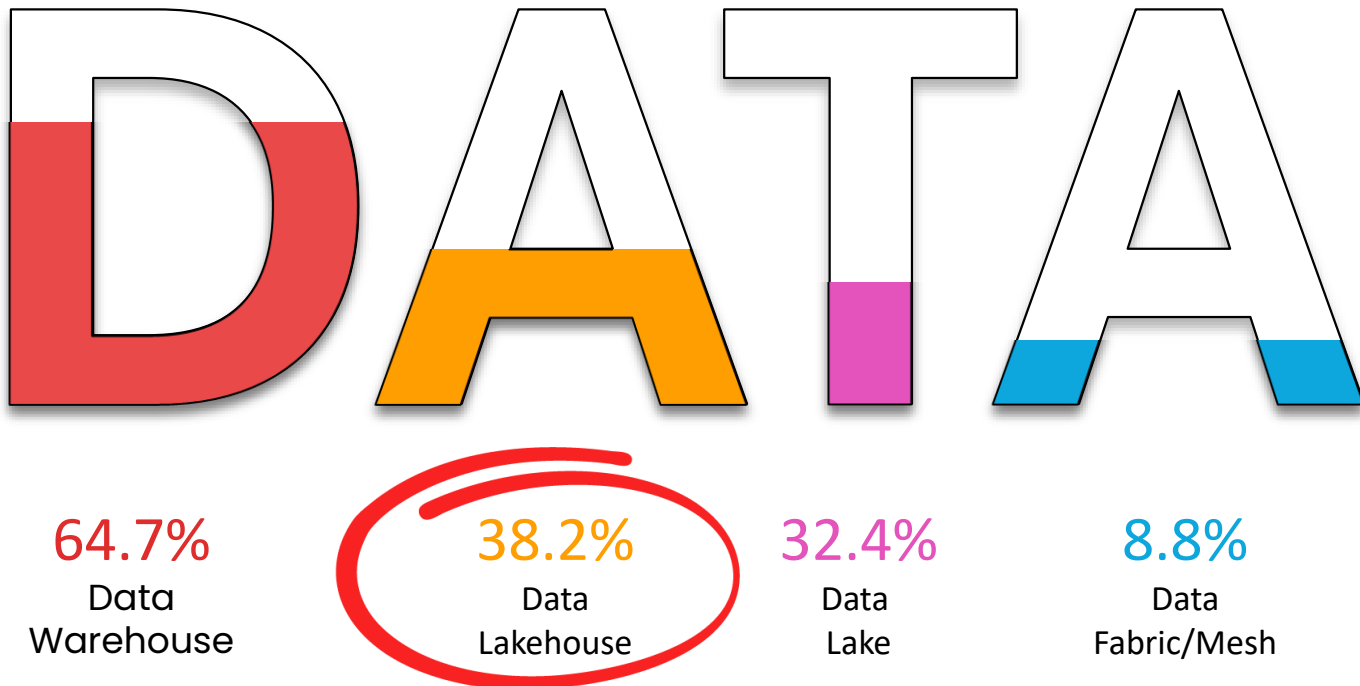
האם אתם עובדים  
כיום בענן לטובת  
דאטה ואנליטיקה?



State of Data in Israel  
STKI 2024

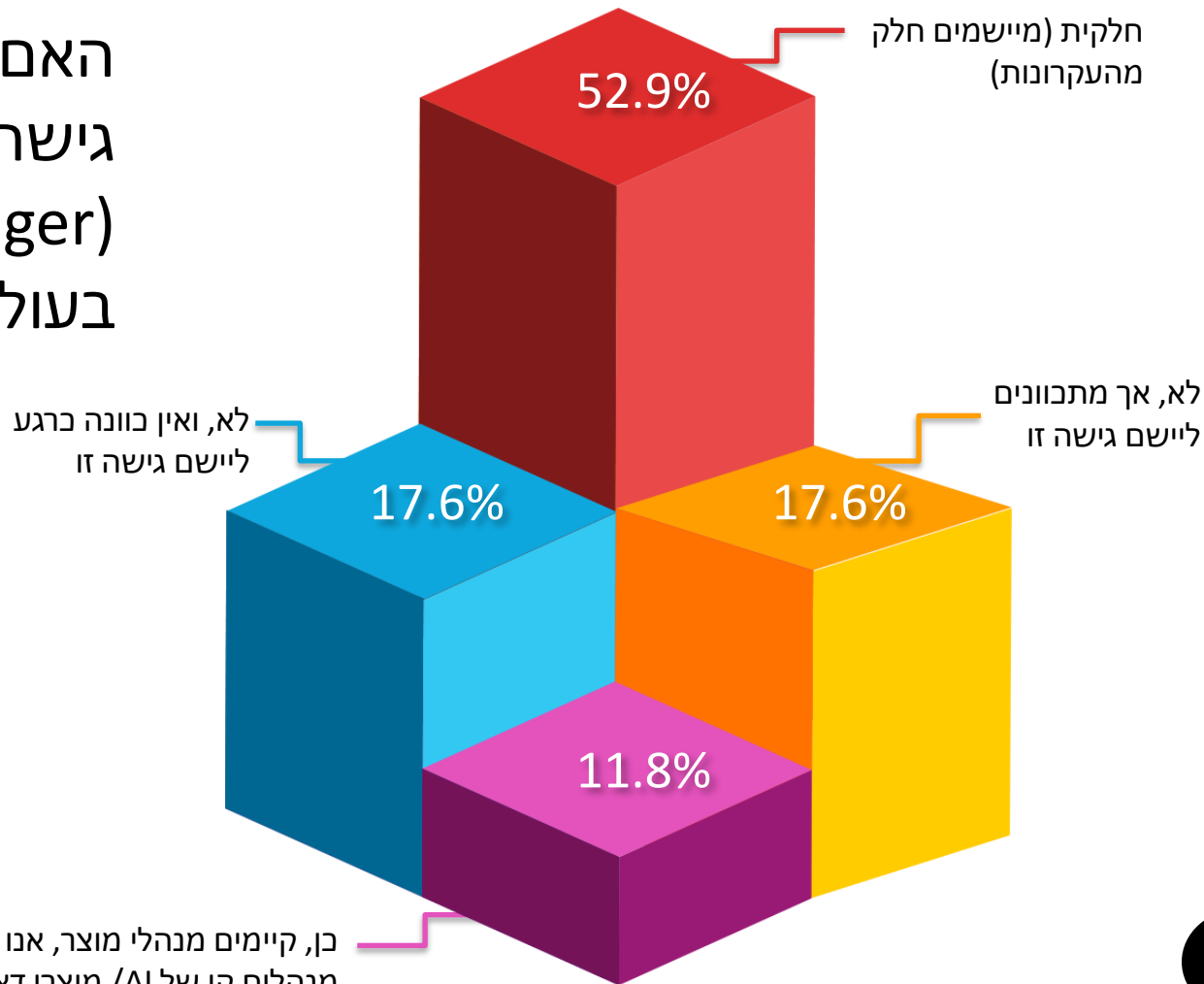


# מהי ארכיטקטורת הנתונים הנבחרת/ מתוכננת בארגוןך?

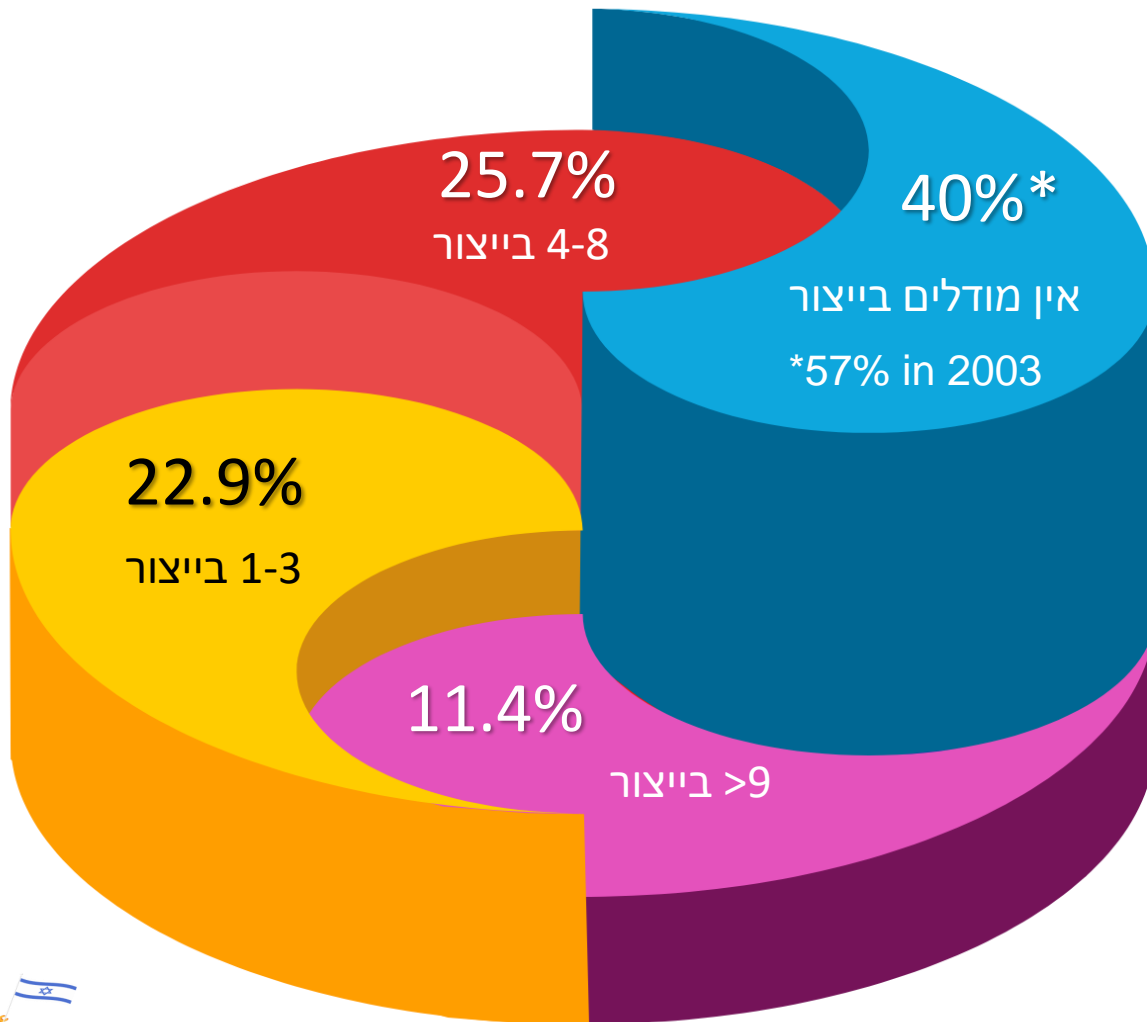




# האם אתם מיישמים גישת "ניהול מוצר" (Product Manager) בעולם הדאטה?



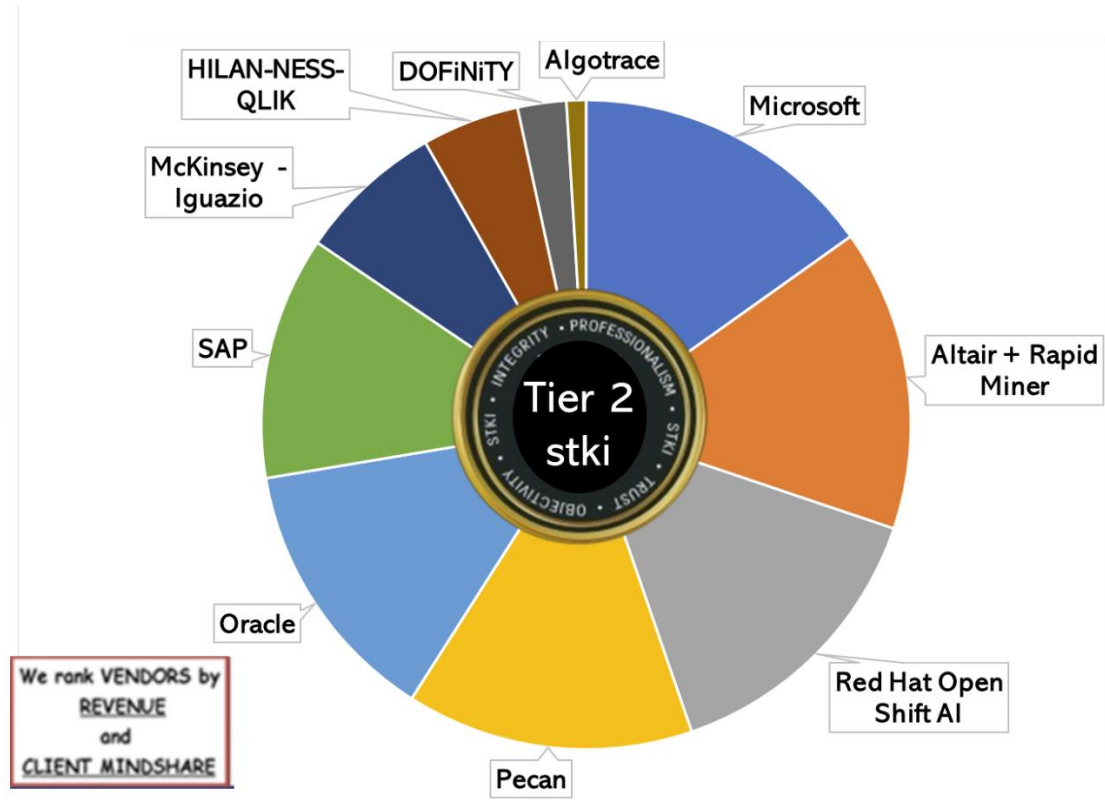
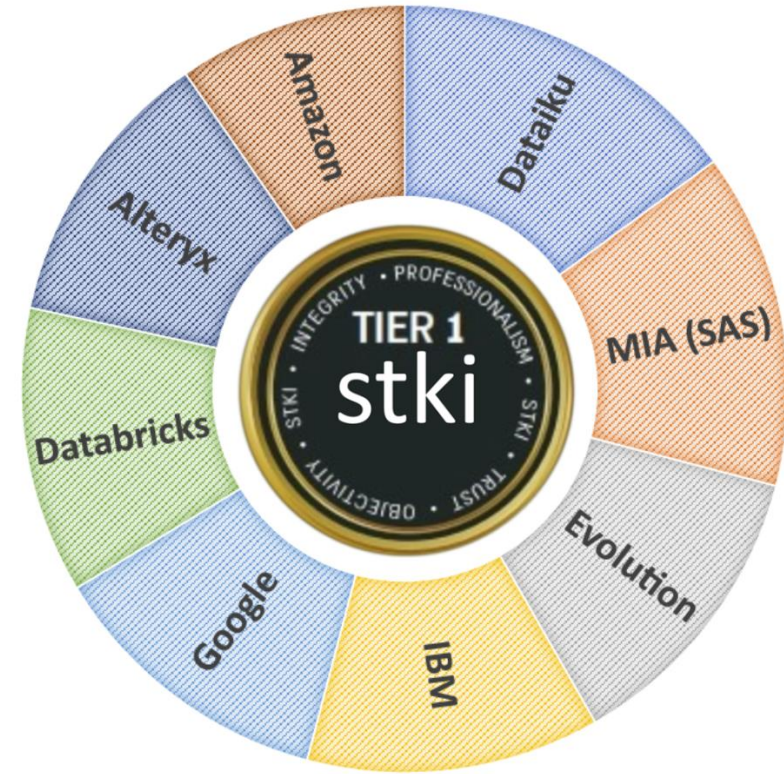
# כמה מודלי LLM בפרודקשן?







# Data Science and ML/AI Tools



We rank VENDORS by  
**REVENUE**  
and  
**CLIENT MINDSHARE**



# Data Science ML Platforms 2024

Presence & Support in Israel

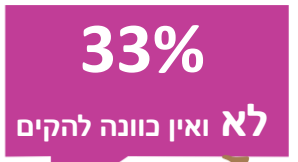
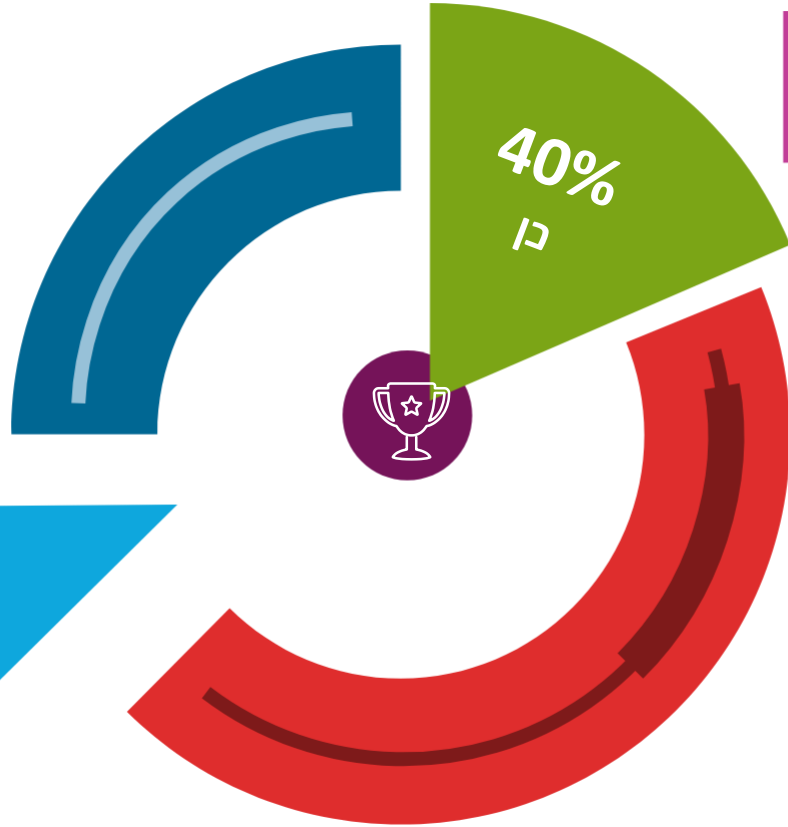


Oracle  
ClearML  
Pecan

Red Hat Openshift AI  
Nvidia AI Enterprise



האם קיים  
בארגון CoE  
(Center of Excellence)  
להנחיית/ העצמת  
אנליסטים ו Data  
Scientists?





We are an American company with offices in Palo Alto and Tel Aviv, where we have deep roots and the ability to recruit top technical talent.

*Ilya Sutskever, Daniel Gross, Daniel Levy  
June 19, 2024*





Thank you for  
your help  
in conducting  
this research

**“I LOVE  
SURVEYS!!!”**  
- said no one ever