

Israel IT Market Study 2024



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



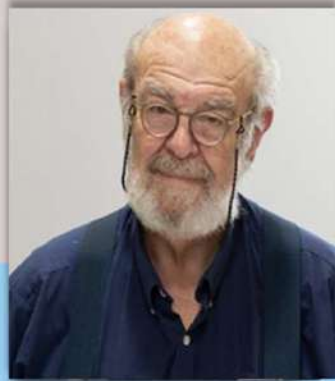
Reut Shefer Bar



GenAI Analyst

STKI Research Team

STKI Research Team



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

Pini Cohen

Pini has been 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 Content Management
 ECM - Enterprise Content Management, KM
 HCM, HR and work environment
 EX - Employee Experience
 QA and Testing technologies and software
 Call Center
 Productivity Tools




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

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STKI: methodology and how to “understand” the results



Dr. Jimmy Schwarzkopf



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Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst

STKI Research Team



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

Over 32 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, defense, 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's 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 in order to service the account with value** .

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

- *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*
- *STKI Annual Summit (Israeli Market)*
- *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 (Trends)*

Unlike some research and advisory firms



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



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X00s of z-presentations
64 WEBINARS
2-day virtual conference

Z-meetings & budget analysis

- 250 CIOs
- 16 Industries

USER Strategic Briefings

product briefings & sales analysis

- 456 VENDORS
 - Presented X00s Briefings
 - 150 categories
 - Over 1000 products/services offered in Israel

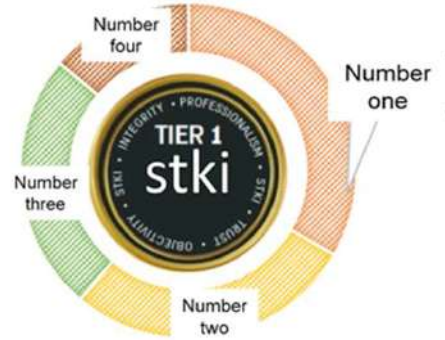
What did STKI analysts do in 2023



	2016	% change	2017	% change	2018	% change	2019	% change	2020	% change
Office Productivity (Office, Calendar, Mail etc.)	10,000	-4.42%	87,000	-6.75%	82,000	-4.81%	78,000	-4.81%	75,000	-4.67%
KM (Enterprise portals, ECM, Search)	76,000	1.52%	77,000	2.60%	79,000	2.71%	81,000	2.67%	83,000	2.47%
Collaboration (IM, Video, Voice)	18,000	11.11%	20,000	15.00%	23,000	15.00%	26,000	11.54%	28,000	18.84%
BI, Analytics and Data Mgmt Tools	151,000	3.23%	160,000	8.88%	175,000	9.37%	192,000	6.77%	205,000	6.78%
Digital Output Management/ Customer Communication Management	18,000	5.68%	19,000	2.69%	19,500	1.13%	20,500	7.32%	21,000	4.51%
	310,000	1.12%	343,000	4.27%	376,500	9.07%	397,500	4.12%	414,000	2.78%

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%

BDA Projects
BDG
Byon
DataTapaz
evs-it
Ewave
HPE
Methoda
StrategiClear
TraSky



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
9. Other

Marketing Automation Suites – 2019



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



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נייר עבודה: מבנה ארגוני וקבלת החלטות בתחום סייבר בארגוני Enterprise IT

סיכום מנהלים:

- בתחום הסייבר יש להבחין בין "גורם מבקר", "גורם מנחה" ו"גורם מתפעל" (אחראי סייבר).
- הגורם האחראי לטיפול ותפעול נושא הסייבר בארגון הוא ה-CIO ("הגורם המתפעל"), לא ניתן להפריד בין הפעולה הזו המללי לבין תפעול נושא הסייבר.
- לעיתים, אציל ה-CIO פסקות (אחריות) לטיפול ותפעול נושא הסייבר למנהל התפעול- השותף



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STKI Methodology: equilibrium model

The sum of all enterprise's (public, private & government) IT expenditures (procurement budgets) must be equal to all IT sales (from vendors).

most research firms are either

"demand-based"

(market information based on data from users of IT)

"supply-based"

(market information based on data from IT vendors).

STKI is one of few research firms using a complex equilibrium model and the only one in Israel.



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



Technology Users



Technology Vendors



What users bought?
From whom?
Why?



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



32 years of Data



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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**

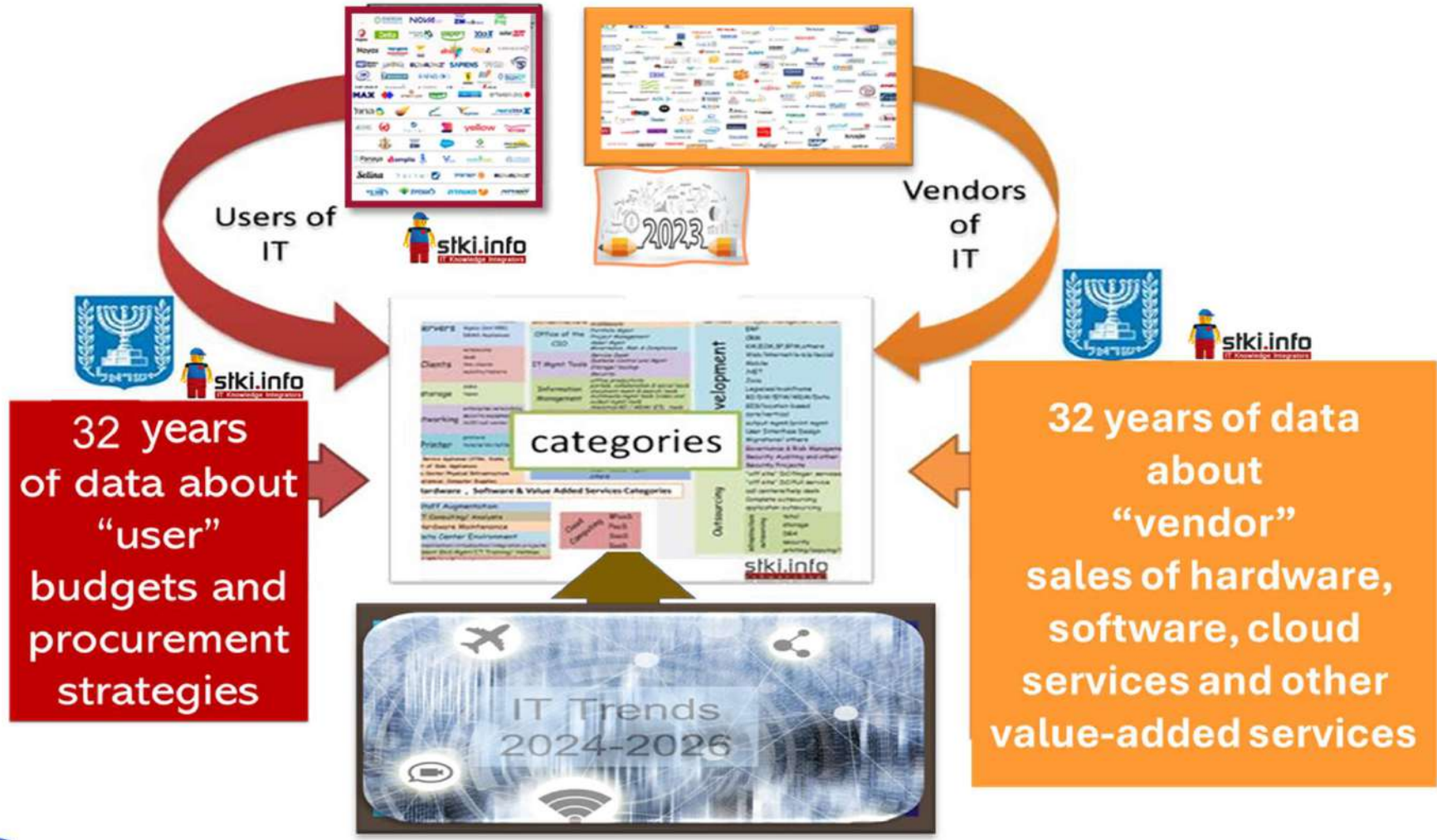
rankings are based partly on new projects, new names and market penetration growth

We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE

- > 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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STKI IT knowledge Integrators
Company Confidential



710 vendors were ranked in this study

Some IT vendors in the study are:

- Private Israeli Companies
- Public Israeli Companies
- Subsidiaries of international companies
- Israeli companies connected to international companies
- Partly owned (by other IT companies)
- Divisions of IT Companies that are managed independently

In order to be part of our study companies **have to participate** in detailed vendor briefings with our analysts and answer a detailed survey; what **they don't have to do** is be clients of our services.



10Secure	Cloudius	HESTRIX	NowSecure	SPEEDVALUE	Artis Multimedia	DCOYA	Kaleido by Bynet	Pulse Secure (Ivanti)	Trustnet	AVCS	DoIT	KPMG R&D Edge	quillip	ui	
11Stream	Cloudofthings	Highnet	NPTech	Spider (Emet)	Asperii-Aman	Dell Technologies	KALITVI API Solutions	PUREPEAK	TSG IT Advanced Systems	AVNET	Dorcom (Emet)	kubecast	Radiflow	UIPath	
2bcloud	Cloudride	HILAN	Nutanix	SPIKEIT (Emet)	ASUS	Deloitte	Kamedia	PURESTORAGE	tufin	balink	DOR-IT	kyndryl	Radvision	Unicloud (Emet)	
3Bears	Cloud Valley	Hilan-Ness	nVIDIA	SPINNAKER SUPPORT	ATERA	denodo	KEYSIGHT	Puzzlehead	TutIT soft	BARMOR (Emet)	Dr Agile	Lenovo	radware	Unitask (Emet)	
5IVE	CodeOasis	Hilan-Ness-DxC	Oasis-Tech	telrad	splunk	Aternity	Designit	Kiteworks	PwC	Tvuna (SQLink)	Barracuda	druva	Liacom	RANCHER BY SUSE	UXVision
A10	CODEVALUE	Hilan-NessPro	OCTOPAI	SQLink	ATLASSIAN	deveap	KMC	Pyramid Analytics	Twilio-Aman	Bay Bridge Digital	dynatrace	Lightbits	Rapid7	Valour Solutions	
A2Z	Cofense	Hilan-Ness-Qlik	OCTOPUS	SSP	Atlassian	Direct Experts (DEX) DIT	KMS-Aman	Qesem Consulting	Twingo by Commit	BCG	E2m	Linnovate	RAZ-LEE	ValuePlus	
ABP Consultancy Israel	Cognit	Hilan-We Ankor	ODI	STKI	AUTOMAT-IT	deggendorf institute of technology	KMT	Qlik - Attunity	twodo	BDA Projects	E4D	LIOR LURYE	RBS Solutions	VANTIQ	
abra	Cohesity	Hitachi Vantara	odoo	StrategiClear Consulting	AUTOMATI ON ANYWHERE	DMway	KnowBe4	Qlik - Talend	TZUR	BDO	Easy Qlik	logiCloud	Reblaze	VARONIS	
Accelario	Collibra	HMS	okta	Strauss Strategy	AutoMonX	DnA-IT	KnowEdge	QMASTERS	ACCESSIBILITY	BDO - Meteor	EasySec Solutions	Log-On	Red Hat	VAST Data	
Accenture	Comax	HMS C-Way	OMC	Stulz	AVAYA	Docomotion	KONFIDAS	QUALITEST	UBTECH	Be2See (Emet)	EDEA	LogRhythm	RED BUTTON	Veeam	
Accesslayers Portnox	Comda	Holistic - ZOH0 CRM	Omega Israel	SUPERMICRO	CSG (Tibco)	Global Data Center	NEWAGE	snowflake	Zigit (SQLink)	Be-Digital	edgeconnex (Global DC)	Lotem	redis	Veidan	
Acoustic	Commit	HP	ONE	SYGNIA	CloudAdvise	GlobalLogic	new relic	Snow (Software)	ZIPCOM	BeLocal	edp	MADSEC	Reis	VeNotion	
Acronis	commit data by Valinor	HPE	ONE - Pivotal	Synerion	Cloudbeat	Google	nextcom	snky	ziv systems	Bezeq	Elad	Magalcom	Renaissance	Veracity (Emet)	
ACS	Commugen	HubSpot	onelogin	synopsys	CloudCheckr	Granulate Great (Digital Partners)	N6G	Softimize	ZOHO	Bezeq Int	elastic	MAGENOFEK	RESCANA RESOLVE	VERITAS	
Actifio	Commvault	I.E.Mittwoch	oNet Systems	SysAid	CloudEdge	MYND (N6SOFT)	SOFTPRO	zscaler	BGATE	Electra	magic	Systems (AyeHu)	VIRGONET		
Adobe	compie	IBM	OpenLegacy	sysdig	Cloud'em (Emet)	GRSEE	NICE	Software A6	CloudHealth	Biconix	ELK	Make (formerly Integromat)	Rewire (before was Micompany)	vision.bi	
Advantech	complete	IBM Innovation Lab	Opentext (Micro Focus)	SYSEC	CLOUDERA	G-STAT	NICE RPA	Solareedge	CLOUDIAN	BigFix by INTEGRITY SOFTWARE	EMEREST	MalamTeam	Rimini Street	vmware	
Afek Systems	ComposeDoc	icloudius	Opisoft (SQLink)	sysnet	CloudFabrix	HashiCorp	nintex	SOLARWINDS	HEAD-ON	Bileader	EMET	ManageEngine	Rittal	VOTIRO	
Agile Experience	Comsec	icoNduct (Emet)	Opisoft-Genius (SQLink)	Systematics	CLOUDFLARE	HCL	Nintex Kryon	Sonatype (Nexus)	Spanning	BIT PLUS	Energy Team	marmamet	RIT Tech	walkmaze (application care)	
Agile Spirit	Comsec By Hub Security	ICS security	OPSWAT	SysTrack	HDS	HCL Unica	nipendo	SOPHOS	NO6AMY	Beyond	EnsureDR	MAROON	riverbed	WebFocus by Tibco	
agilepoint	CONFLUENT	ICTBIT	Oracle	tadiran telecom	Normative	MongoDB	Servicenow	Yael NetCloud	Specterx	BIZ AID	ENTROPHY	matan consulting	Rivory	WEBISCOPE (by Aman)	
AgileSparks	Consist	IDC	Oracle Consulting	Taldor	applitools	DATA PARTNERS	ITNAVPRO	ProcessGene	TriggerPlus Software	BlackBerry	equalum	Matrix	Rockwell	webtech	

Vendors page 1



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AGINIX	ControlUp	IDEO DIGITAL (Emet)	orce security	telend	APPSOLUTZ LTD	DATA PRO	ivanti	Profisea	Triple C	BMC	ERA	matrix 2Bsecure	RSA	WEDO (Emet)
AI Smart Stream	Converto	Iguazio (McKinsey)	ORO CRM	Tamara Telecom	APPTIO Cloudability	datricks	Jenkins	PROLINK	TripleCyber	BO	ERGO	matrixDnA	Rubicon (a Red Hat boutique)	WECHANGE
Ajimah	Copera (Emet)	Illusive	OutSystems	Tamar Communications	aquesec	DB Best Technologies (by Amazon)	JFrog	Prologic	TripleT	boomi	ericsson	matrix Bi	rubrik	WEKA
Akamai Technologies	CORNING	ilu-Rak	Own (backup)	Tamayo (Zoho)	arcserve	db@net	Juniper	proofpoint	TRIPP-LITE (by Eaton)	B-PRO	ermetic	Mavkyim Software Solutions	RUCKUS	WEKU
akt	Couchbase	IMMUTA	P.Z. Projects	TASC (Consulting)	ARDOM	DBArt	k2view	Passler AG (PRTG)	TRUNOVAT E	Brillix	eset	mce	SafeBreach	WERTECH
Alation	Creatio (by Proceed)	imperva	PagerDuty	TASKTOP	ARISTA	DBmaestro	KAKADOTE CH	ptc	Trust IT	BROADCOM	Eshnav-Aman	McKinsey	SailPoint	WHITE-HAT
ALEXANDER SCHNEIDER	CrowdStrike	imprivata	PaloAlto	TCS	Clkum	GBS	NAYA Tech	SingleStore	YAZAM TECH	BROADCOM - Cloud Health	Eternity-Aman	MedOne	Salesforce	wideops
Algosec	CTM	Infinidat	PANDUIT	TechWind	Cisco	Generic Tech	NEBIUS	Sinopia	YOUCC	Brocade	evo-it	MedSec	Salesforce-Tableau	WINNER CODE (Emet)
Algotrace	CyberArk	infinipoint	Panorays	Telecom Experts	Citadel (Emet)	Genius (SQLink)	neo4j	sisense	yoyo	BUGSEC	EVOLUTIONI T	MENAHIEL 4 YOU	SALT	WINIT
Alibaba Cloud	CYBERcom (Emet)	Informatica-Aman	PARTICLE	Tenable (Nessus)	Citrix	Genpact (pbsoft)	Netalizer	SIT	Y-tech	bulwarx	EVOLVEN	mendix	Saninteractiv e	WIZ
Allyable	CybeReady	Inkod	Partner	Teradata NCR	clarizen	GigaSpaces	NetApp	SKYBOX (Security)	zadara	BunkerSec	Ewave	Methoda	SAP	workato
AllCloud	Cyberint	innoSec	Pecan	TeraSky	CLEARSKY Cyber Security	GitLab	Netcraft	SMARTBEAR Software	Ze ZEBRIUM	Business & Decision	EXAGRID	MIA (SAS)	SAP - Emarsys	WSO2
Allegronet	CyberProof	INNOVA (Emet)	Pega Elad	Teraworks	CSG (Citrix)	GIV Solutions	netskope	Smart IT	Zemingo (Emet)	Bynet	Experis	Microsoft	sas	Xioma (Top Group)
All Trade Group	CyberTeam360	innovad	Pelican-Tech	TEST PRO	snodot-Pileus	DataRobot	IPSec	PMZONE	Top Group	Bynet Cloud	Experity	MicroStrategy	Sasa Software	Yael Group
almog	CYBONET	InsFocus	PELTON	Test craft	APC by Schneider Electric	DATA SCIENCE GROUP (dsg)	IPV Security	PNMsoft	Top Group - Panorama	Byon IT Solutions	EY	MIDLINK (Emet)	I Sciforma	Yael Business Applications
ALMtoolbox	Cymulate	inact software	PENGUIN SOLUTIONS	Testim	epplan	DATA tapes	IRONSCALES	portnox	Train Mate	C4 Systems	ez-ROI	MilestoneZero	SDS	Yael Infrastructure
ALTAIR+RAPIDMINER	Cynet Security	Integralis	PENTERA	that's it	Appium Documentation	DB DATABANK	irox	PractiProject	Trellix (Mcafee)	Calanit by ONE	f5	MILGAM	Securenet	Yael All Data
Alteryx	Cyelo	INTEGRITY SOFTWARE	PERCONA	Tibco	APPLAUSE	databricks	IT solutions	PRIMSEC	Trello	Calcom	FADDOM	mindU	SecuriTeam	Yael IFN
Aman Digital	Cybrebro (CyberHet)	Intentia Israel	PERFORCE (testcraft)	TICOMSOF	Apple	DATABOG	it Assist	Priority	TREND MICRO	CALLBOX	FBC	MINICOM	See-Security College	Yael Smartsoft
Amarel	DANET COMMUNICATIONS	INTERNET GROUP	pingdom	TIKAL	Applicat	dataiku	ITCC (IT Care Center)	Proceed (HMS)	TRAIID Security (by Yael Group)	Capito	Fibernet	mobideo	Sela	Yael Triad
amazon	Darie IT Solutions	Interserv (Emet)	Pionet	one Digital	CheckMark	FUJITSU	MSP	Sheket Technologies	Yael Korentec	Carmelon	FireEye	mobisec	Semperis	Yael Consienta
amdocs	Datacube	InterSystems	PitangoUX	Tiuv System Consultants	Checkmarx	gall software	MySP	SIGA	Yael Korentext	CATO NETWORKS	FMR	moblin	SenseCOM	Yael CloudTech
ANAGAL	datamind (business intelligence)	iprosis	PMG (Pravda Media Group)	Todan	CHECK POINT	Gartner	Nagich by click	Signature-IT	Yandex Cloud	celigo	force majeure	model9	SentinelOne	Yael Opsguru
Centerity Systems	FORESCOUT	monday.com	Serverfarm	Yael Realcommerce	Chayon (Alltrade)	Freshworks	moveo	SEVENTH DIMENSION	Yael Integration	Cellcom	Forcepoint	modelZ	SEPIO (cyber)	Yael Acceptic
					AVCOM	DOFINITY	KPMG	Quest		UCL	CGS	FORTINET		

Vendors page 2



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Infrastructure Products & Services
servers X86
Legacy (non-x86)
Data Appliances
HCI appliances
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
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 , Robot , Self Service (ATM/Kiosks/other)
General Purpose Cloud Enterprise Consumption

Infrastructure Products & Services



Software Products (usage fees, licenses, subscriptions, SaaS and maintenance)



Software Products (usage fees, licenses, subscriptions, SaaS and maintenance)	
Infrastructure & System Software (including storage software)	BI and Data Discovery Tools
data platforms (SQL, NoSQL dbms)	Data Mgmt. Tools (including data catalog, governance, ETL, quality)
Cloud data platforms (SQL, NoSQL dbms)	Data Science and ML/AI Tools
App/WEB Server, Emulation, BRMS APaaS (container platforms) Integration Streaming	ERP
IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ITSM, Service Desk	vertical / core applications
FinOps tools	CRM
Endpoint related tools	HR/ Talent Mgmt. / LMS
Network/Web cloud services (FW, WAF, ddos services, etc.)	Marketing Automation Software
data content related tools (DLP, DB FW, DLP Habana, etc.)	Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc....)
cyber management tools (SIEM tool, incident responds, automation)	E-Commerce and Marketplace Platforms
Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access service edge) IDM, Access	Web Content Management Platforms
Cloud security protection tools (CNAPP CSPM CASB)	PLM Systems
Other cyber tools (secure development, awareness etc.)	Blockchain platforms
Project & Portfolio Management	RPA Platforms
Development tools, ALM, DevOps for all environments (including Mobile)	BPM Platforms
Low Code tools	IOT tools and platforms
Governance, Risk & Compliance	GIS, WMS, transportation tools
Regulation	banking, insurance and other financial market software
Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)	
Digital Output Management/Customer Communication Management	
Employee Collaboration, Task Management & Engagement Tools	

VAS Value Added Services (professional services)



Value Added Services (professional services)		
IT Strategy Consulting	PPM / Project management	Finance Industry Core Projects
Organizational Transformation Consulting (organizational models, change mgmt, product mng consulting, agile consulting, methodologies etc.)	ALM & Development & Testing tools implementation	Transportation
Data & AI Strategy Consulting (organizational data structure, methodologies, data architecture planning, finding use cases, literacy)	ERP Implementations	Public (COVID19 & post 7/10) Projects
IT Infrastructure & Cloud Consulting	HR & Talent Mngt & Payroll Implementations	e-payments Projects
Application Projects Consulting	CRM Implementations	Retail Projects
Customer Experience & Digital Experience consulting, service design, Digital consulting- doesn't include UX	ITSM Implementation	Public (government) modernizations
Intelligent Automation & Process Optimization	E-Commerce and Marketplace Implementations	Location Based Projects
PMO/OCIO Consulting	Marketing Automation Implementations	Self-Service & Robots Projects
Cyber Security Consulting	Advanced Analytics, Data Science and ML projects	Tele-medicine Projects
Software Maintenance (3rd party)	Generative AI and LLM projects	Complete and/or application outsourcing (Client owns the HW)
Hardware Maintenance (3rd party)	Data management implementation (quality, ETL, catalogs...)	Infrastructure Outsourcing (infrastructure, storage mgmt, DBA services)
Consolidation/Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects	BI implementation / development	Call Centers/Help Desk Outsourcing Services
Software Integration (Middleware, SOA, API/MNG)	Data & Analytics Cloud migration (enterprises) (help in migrating DW and Data Lakes to the cloud)	FINOPS Services
Cyber Security Product Implementations	General Software Development	Cyber Security Services (MDR, Threat Intelligence, etc.)
Unified Communication Projects (IM, Video, Voice)	Product Design (UX)	SIEM as a Service
Consolidation/Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects / DEVOPS	Professional Education, Coaching & Mentoring	CISO as a SERVICE
Software Integration (Middleware, SOA, API/MNG)	SW Testing & QA	Backup as a Service & DRaaS
Cyber security product implementations	Fruition & Implementation (LUXION)	Printing Outsourcing Services (pay per click)
Unified Communication Projects (IM, Video, Voice)	Regulation Projects	Business Services as a Service: BaaS (Salaries, Payments, BPO, etc.)
Cloud Migration end to end Projects (including SW development)	Governance, Risk and Compliance Management	Near shore
Technological Innovation Projects	Contact Center and Multi channel engagement projects	Off shore
Automation tools (RPA, OCR) Implementations	Employee Collaboration, Task Management & Engagement Tools Implementations	Staff Augmentation (gulfair)
Blockchain projects	Knowledge Management (ECM, Portals, Search, Knowledgebases) Implementations	
IoT Projects		

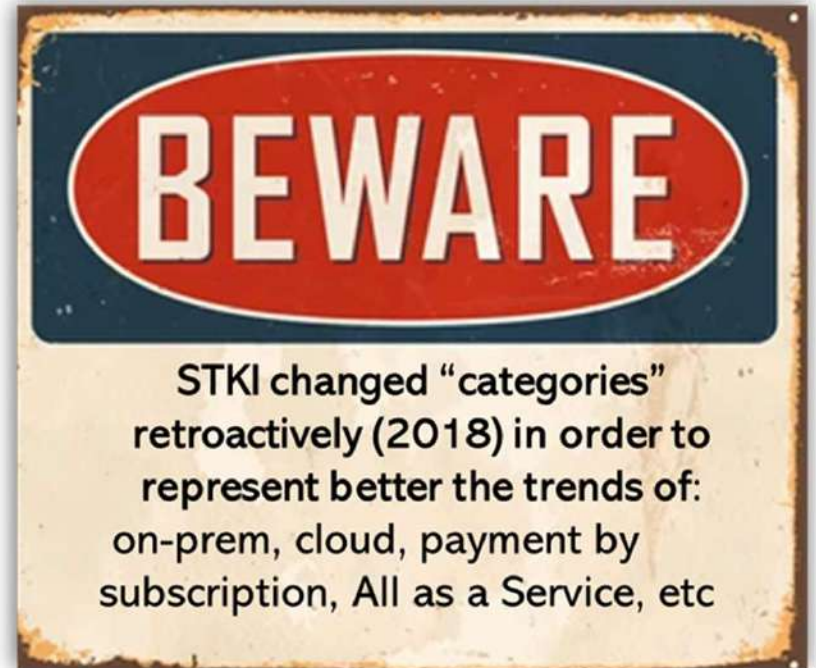


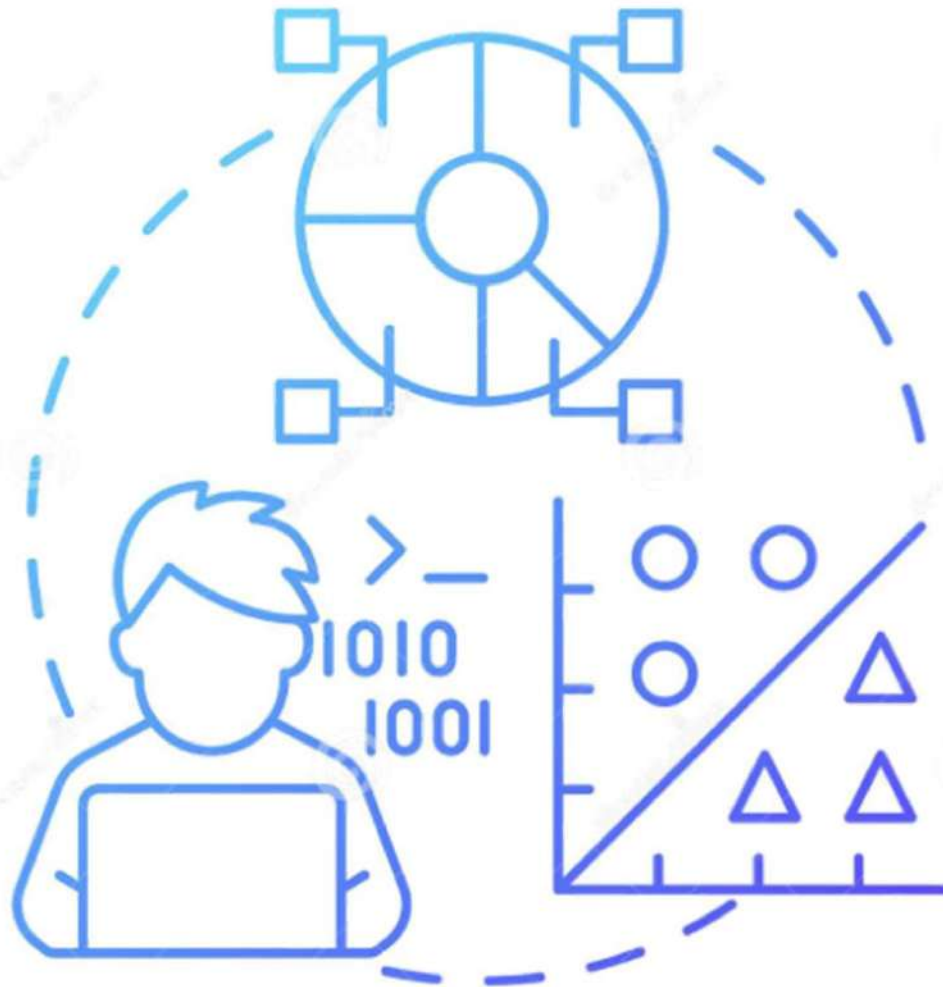
Over 150 categories (revised)



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STKI IT knowledge Integrators Company Confidential





Calculating rankings of 710 vendors in 150 categories based on:

1. Vendor Briefings
2. Survey Results (vendors)
3. Survey Results (user mindshare)
4. Analysts' knowledge of vendor value to users
5. Data of 32 years





The Area a company occupies in the circle is not relevant and has no meaning.

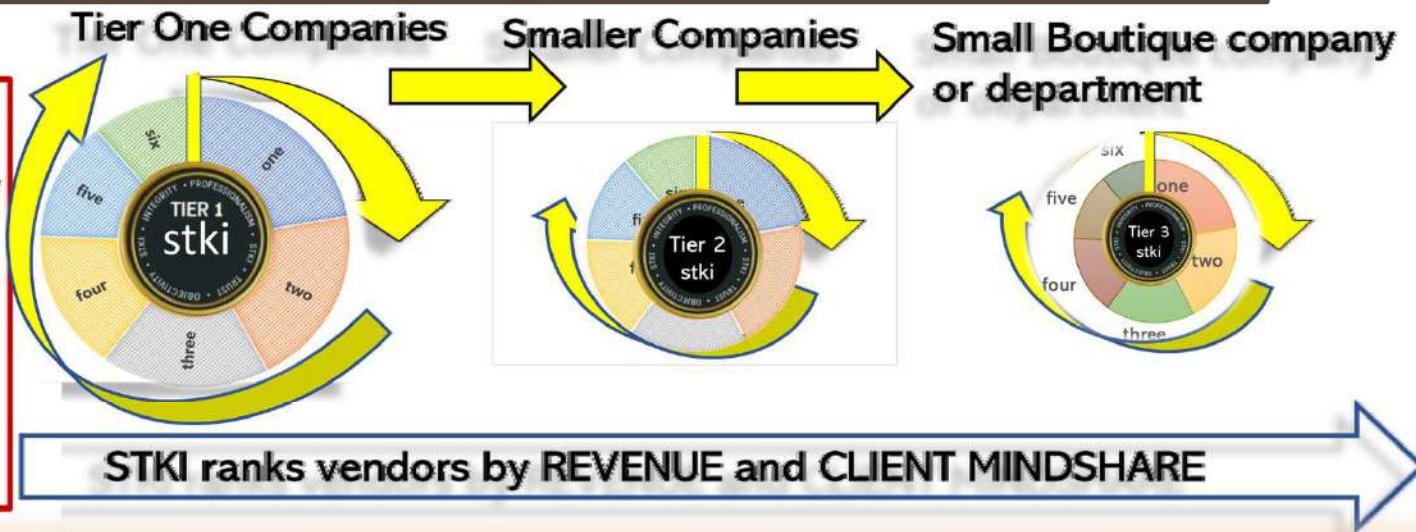
✓ PLEASE NOTE

✓ PLEASE NOTE

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



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



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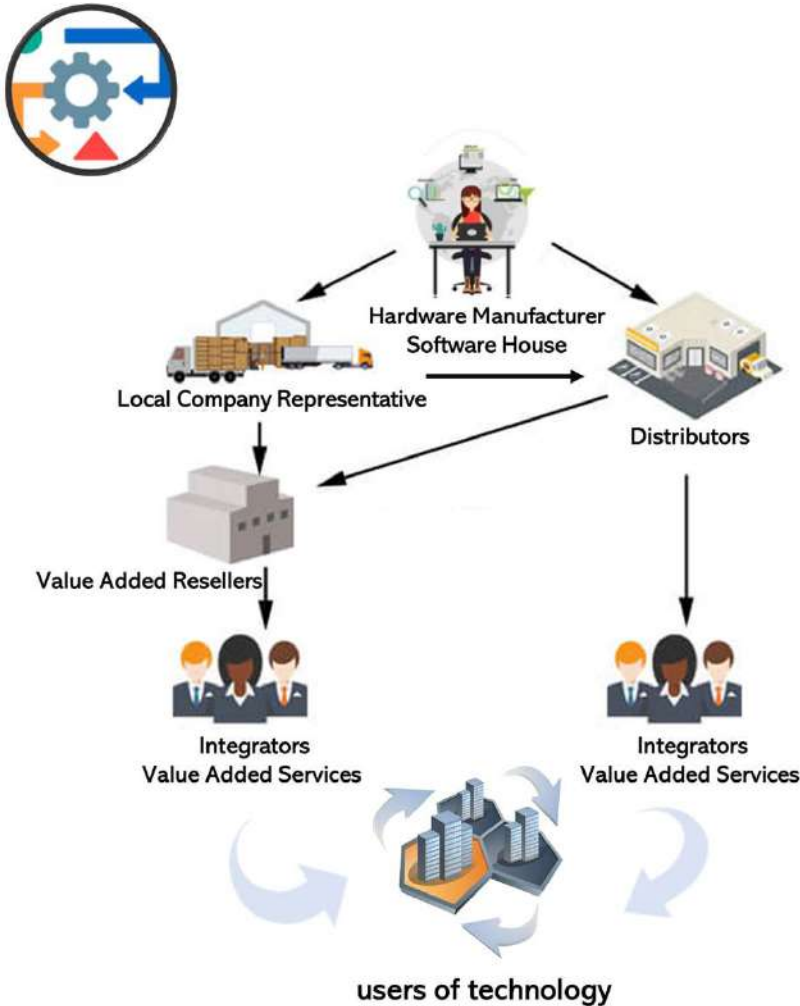
Manufacturers/Software Houses, Distributors, VARs no double bookings for IT Market Size Forecasts



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.





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 in sections INFRASTRUCTURE and/or SOFTWARE*)

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



“Israeli Positioning” for products

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**

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 support experts; localization; local R&D



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



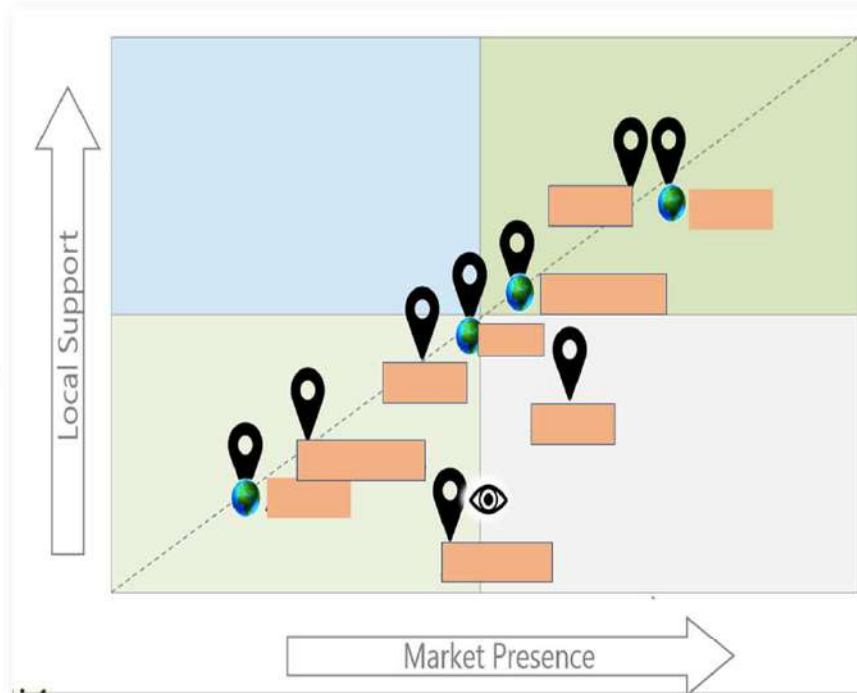
▲ **Global leaders:** marked according to international analyst firms



Y axis

(Local Support):

Number and quality of support experts, it's localization and language support and if there is local R&D



X axis (Market Presence)

Installed base; New sales; Mindshare



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

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**.



Israel economy, business activity



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



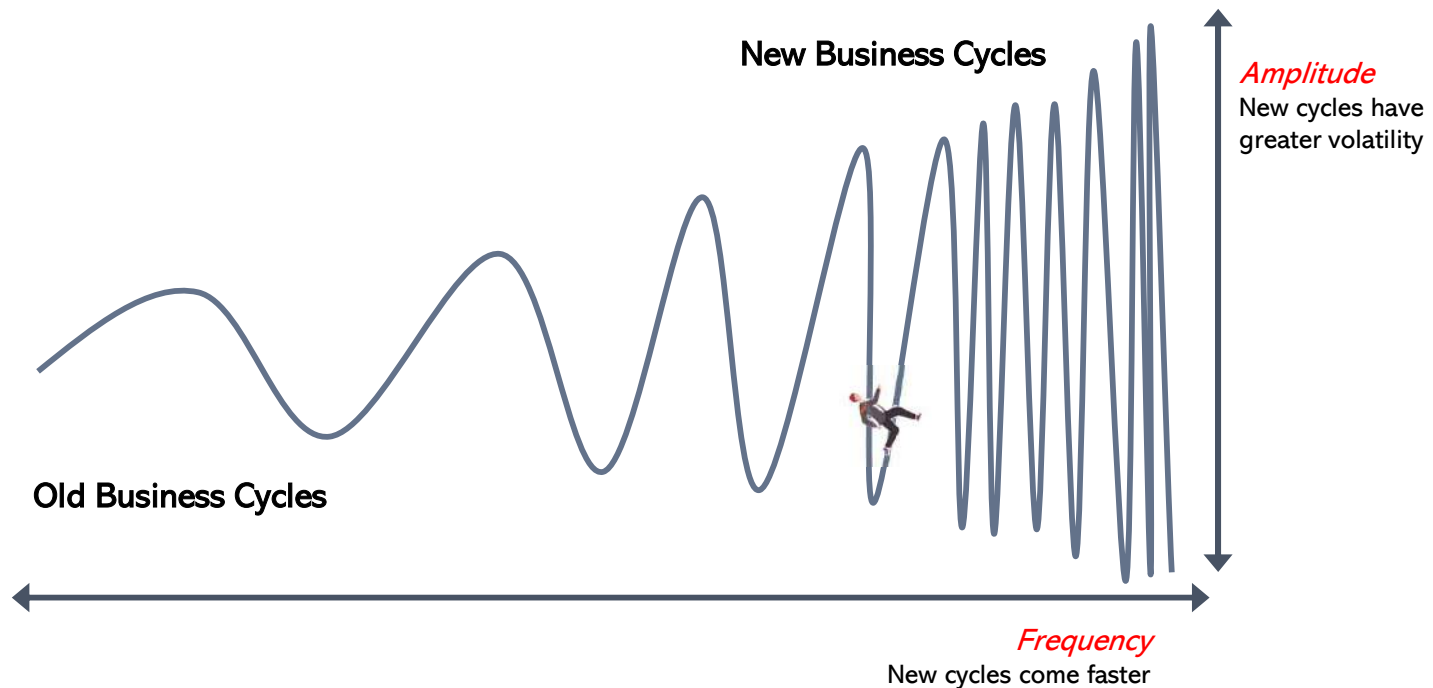
GenAI Analyst

STKI Research Team



THE ISRAELI BUSINESS WORLD IS CHANGING

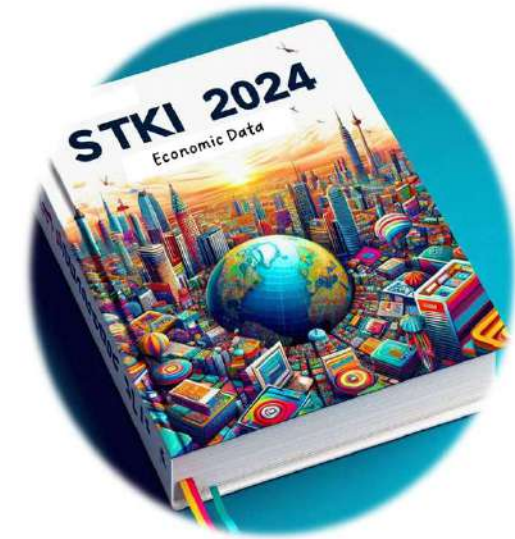
companies must do **more with less (and fast)**



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Israel GDP grows by 14% in Q1 2024 after slump in late 2023



- **The Israeli economy recovered** from some of the worst effects of the war in Gaza at the start of the year, returning to growth **after a heavy setback in the final months of 2023**.
- The Central Bureau of Statistics said in an initial estimate that **the Israel GDP grew at an annualized rate of 14.1% in Q1 2024** from the prior three months, just shy of a Reuters consensus of 15.3%.
- The rise marked a significant recovery from a contraction of close to 22% in the last quarter of 2023, which followed Palestinian group Hamas' October 7 cross-border attack on southern Israel and the IDF's subsequent ground invasion of Gaza.
- **The shock derailed nearly two years of continuous growth in the Israeli economy.** Israel's military operation in Gaza has continued to persist into 2024, and attacks by both military and settlers in the occupied West Bank have escalated.
- The war has precipitated **severe labor shortages within Israel**, compounded by the mobilization of Israeli citizens for military service and the barring of Palestinian workers from entering the country.
- Despite the ongoing war, which includes continued Israeli operations in Gaza, northern Israel and escalating violence in the West Bank, **many economic indicators such as private consumption and investment have shown signs of recovery, though they have not returned to pre-war levels. Military spending continues to inflate public consumption figures.**

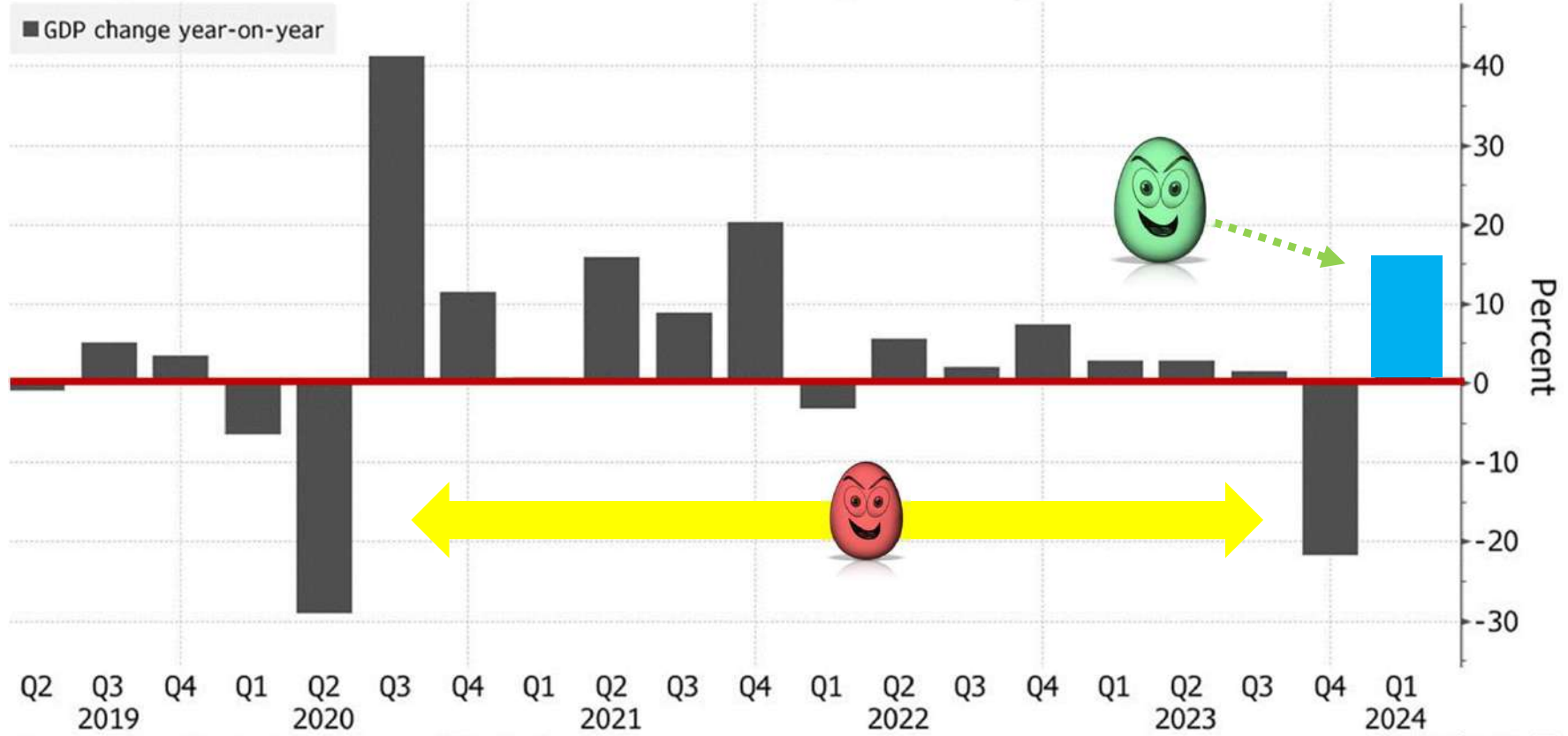


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Israel's Economy Rebounds Sharply

War against Hamas caused one of Israel's deepest slumps ever



Source: Israel's Central Bureau of Statistics, Bloomberg

Bloomberg



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OECD Economic Outlook, Volume 2024 Issue 1

The terrorist attacks and the subsequent war have hit Israel's economy,

Which is projected to grow by 1.9% in 2024 before picking up by 4.6% in 2025. Private consumption rebounded quickly and is set to remain an engine of growth, together with government consumption related to the war. Investment and especially construction, which declined sharply late in 2023, are projected to recover only in part, remaining below their October 2023 levels, as influxes of foreign workers do not fully compensate the suspension of Palestinians' work permits. Inflation is projected to remain at 2½ per cent in 2024-2025, as the impact of the 2025 VAT increase offsets ongoing disinflation.

Disinflation will allow policy interest rates to be cut in 2024. Nevertheless, greater sovereign risk and the rise in government spending call for prudent monetary and fiscal policy. Permanently higher military expenditure needs to be funded by a combination of revenue-generating measures and spending restraint, whilst preserving programs that underpin future growth such as education and research. The planned value-added-tax rate increase in 2025 should be supplemented with a streamlining of exemptions.

The attacks and subsequent war have wide-ranging economic consequences

The attacks on Israel of 7 October 2023 and the subsequent war have deeply impacted the Israeli economy. Schools and many services closed for three weeks. The suspension of work permits for Palestinians and the departure of many foreign workers halved the number of non-Israeli workers from 6.7% of employment before October 2023 to 3.5% at the end of 2023. Homebuilding consequently declined by 53% in the fourth quarter compared with the previous quarter, and overall investment shrank by 26%. Foreign labor shortages are also weighing on farming. The enlistment of 340,000 reservists (7.2 % of employment) weighed on activity across the economy including in the high-tech sector. Government consumption however soared by 17% in the fourth quarter of 2023 due to military operations. Credit card purchases, which expanded strongly in December 2023 and the first quarter of 2024, point to a rapid recovery in private consumption.



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Trade was also severely disrupted,

with exports and imports both shrinking in the last quarter of 2023. Following resumption of industrial activity after the October production shutdowns, goods exports rebounded in early 2024. Service exports have been more sluggish especially foreign tourism, which has been mostly halted. The 2023 fall in global food and energy prices contributed to the disinflation process prompted by policy interest rate increases from 0.1% until April 2022 to 4.75% in May 2023. The annual consumer price inflation rate was 2.7% in March 2024, down from 5.0% in March 2023

Economic policy is responding to the war

Fiscal policy is being reviewed to adapt to new requirements. The very large amount of war and associated expenditure has contributed to the move from a budget surplus of 0.4% of GDP in 2022 to a deficit of 4.1% of GDP in 2023. This deterioration, together with greater perceived country risk, led credit rating agency Moody's to downgrade Israel's sovereign rating in February. Israel's sovereign credit default swap rate has remained half a percentage point above its pre-October 2023 levels since November 2023. A key part of the authorities' response has been to find new sources of revenue including by increasing the VAT rate from 17 to 18% in 2025. There is also restraint in non-military spending, one example being cuts in convalescence pay in 2025. Looking beyond the immediate cost of the war, military spending is set to rise permanently by at least half a per cent of GDP.

Headline and core disinflation together with a stable currency opened the way for the central bank to start an easing cycle. The Bank of Israel cut its main policy rate from 4¾ to 4½ per cent in January 2024. Easing inflationary pressures are anticipated to allow the central bank to implement three further 25 basis point cuts to bring its key rate to 3¾ per cent by the end of 2024 and in 2025.

Consumption is driving the recovery

Output is set to expand over 2024-2025 under the impetus of strong government and private consumption and a partial recovery of investment. Construction is projected to recover only partly from the depths at the end of 2023, holding back investment and imports, as foreign workers replace only some of the Palestinians whose work permits have been suspended. Homebuilding is anticipated to account for about 4% of GDP by end 2025 against 7% in the third quarter of 2023. Labor shortages are also set to weigh on farming activity. Foreign tourists are assumed to start returning to Israel towards the end of 2025. Prices are projected to keep mildly decelerating, as the economy operates slightly below full capacity and lower global energy and food prices pass through the economy, even if the VAT increase is going to push up headline prices.





Risks are high.

The opening of a northern front in the current conflict would halt consumption and further disrupt economic activity, generating a slump similar to the one observed in late 2023 and considerably exacerbate budget pressures. Furthermore, failure to attract enough foreign workers could result in the construction and investment recovery being weaker than projected. On the other hand, construction and overall investment could expand considerably more than projected if influxes of foreign workers are large enough to compensate the shortages that followed the suspension of Palestinian work permits, or if this suspension is reversed. A peaceful resolution of the conflict would also boost growth, including through the resumption of foreign tourism and stronger investment, while easing budgetary pressures through lower military expenditure and a reduced sovereign risk premium

Fiscal adjustment and monetary stability are needed to keep the economy on track

The large government spending shock created after the attacks and the subsequent war can only in part be absorbed through higher debt. Permanently higher military spending calls for new tax revenue and spending restraint. In this regard, the choice of raising the general VAT rate in 2025 is welcome, as the current rate of 17% is relatively low by OECD standards and VAT is a form of taxation that implies comparatively limited economic distortions. This measure should be accompanied by efforts to remove VAT exemptions, starting with the one applicable to certain online purchases. Increasing residential property tax rates would also bring revenue whilst creating a more level playing field for municipalities between commercial and housing development.

Expenditure restraint would best preserve future prosperity by using spending reviews to identify programs to cut, scale back or reform. Examples to consider for cuts include subsidies that weaken incentives to join the labor market. Spending restraint however ought to leave sufficient funding for areas, such as education, that are particularly important to a country with strong demographic growth and an economy whose dynamism depends on the knowledge-based high-tech sector. Whilst disinflation leaves space for some monetary easing, monetary policy must remain prudent to maintain favorable funding conditions for the government and the economy.



Israel: Demand, output and prices

	2020	2021	2022	2023	2024	2025	
Israel	Current prices NIS billion	Percentage changes, volume (2015 prices)					
 GDP at market prices	1 417.3	9.3	6.4	1.8	1.9	4.6	←
Private consumption	686.7	11.4	7.5	-0.7	4.0	2.5	
 Government consumption	330.5	5.2	0.0	7.9	14.7	2.7	←
 Gross fixed capital formation	317.8	13.5	10.4	-1.6	-12.4	12.7	←
Final domestic demand	1 334.9	10.4	6.5	1.0	2.6	4.8	
Stockbuilding ¹	24.5	0.5	0.9	-0.7	-0.5	0.0	
Total domestic demand	1 359.5	10.7	7.3	0.3	2.1	4.8	
 Exports of goods and services	391.4	14.8	8.5	-0.6	-0.1	3.0	←
 Imports of goods and services	333.6	21.2	12.1	-6.6	-1.7	3.4	←
Net exports ¹	57.9	-0.9	-0.6	1.7	0.4	0.0	
<i>Memorandum items</i>							
GDP deflator	–	2.1	4.8	4.1	2.8	2.3	
 Consumer price index	–	1.5	4.4	4.2	2.5	2.5	←
Core inflation index ²	–	1.3	4.0	4.2	2.0	2.5	
Unemployment rate (% of labour force)	–	5.0	3.8	3.4	3.9	3.9	
 General government financial balance (% of GDP)	–	-3.4	0.4	-4.1	-6.6	-5.5	←
 General government gross debt (% of GDP)	–	67.8	60.4	62.3	66.4	67.7	←
Current account balance (% of GDP)	–	3.9	3.9	5.1	4.4	4.3	

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 115 database.

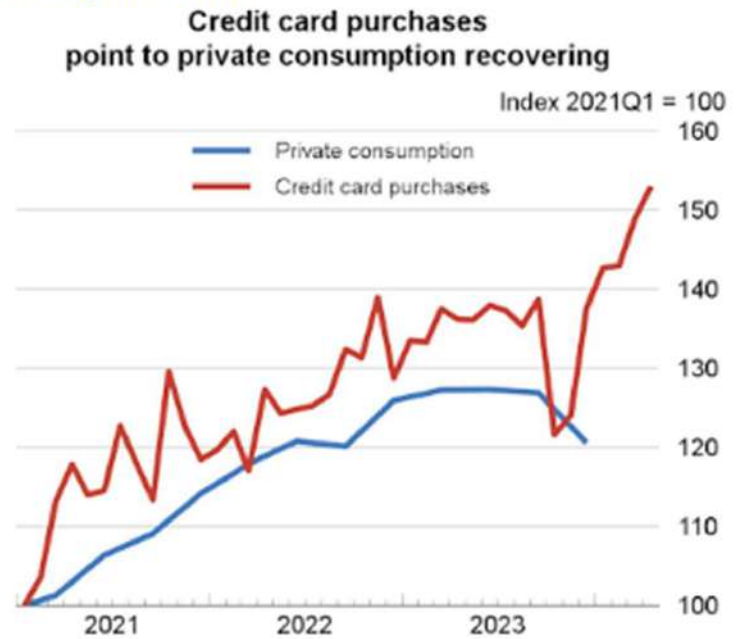
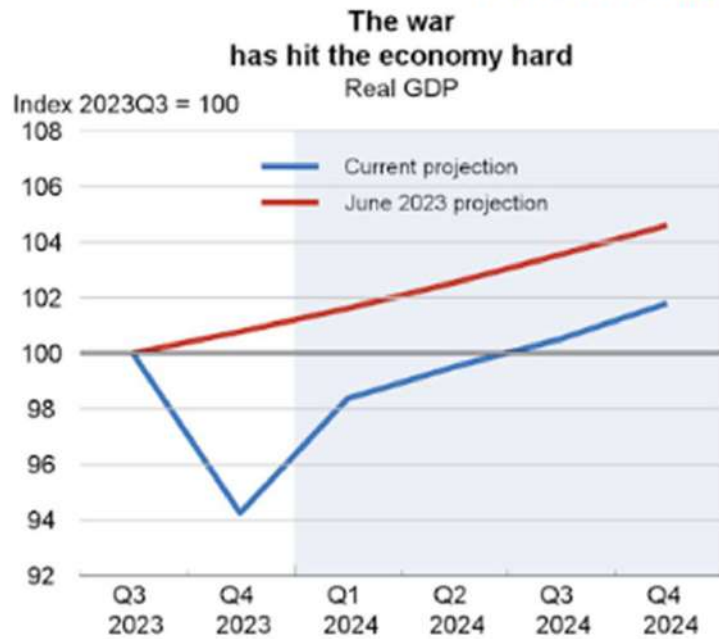
 StatLink <https://stat.link/61y2lq>

 OECD Economic Outlook, Volume 2024 Issue 1



OECD Economic Outlook, Volume 2024 Issue 1

Israel: Economic growth and activity indicators



Source: Bank of Israel; OECD Economic Outlook 113 database; OECD Economic Outlook 115 database; and OECD calculations.

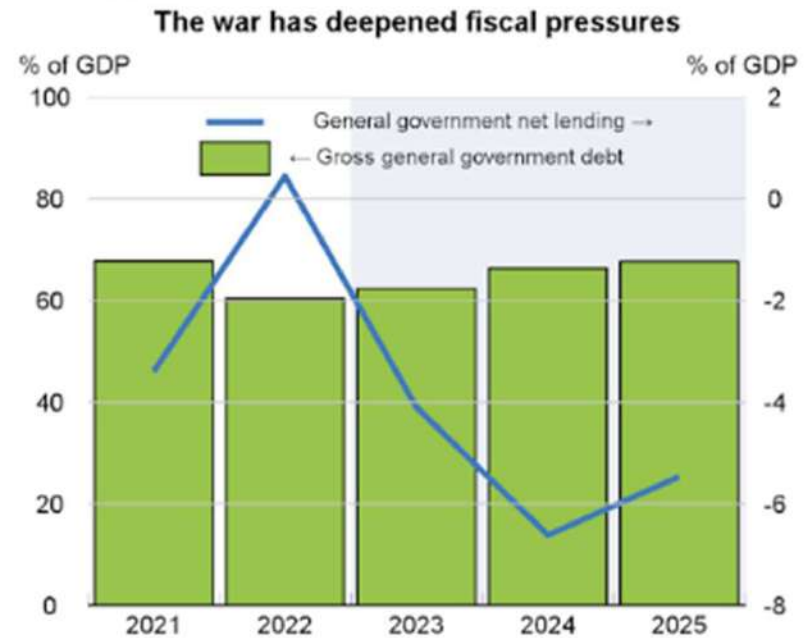
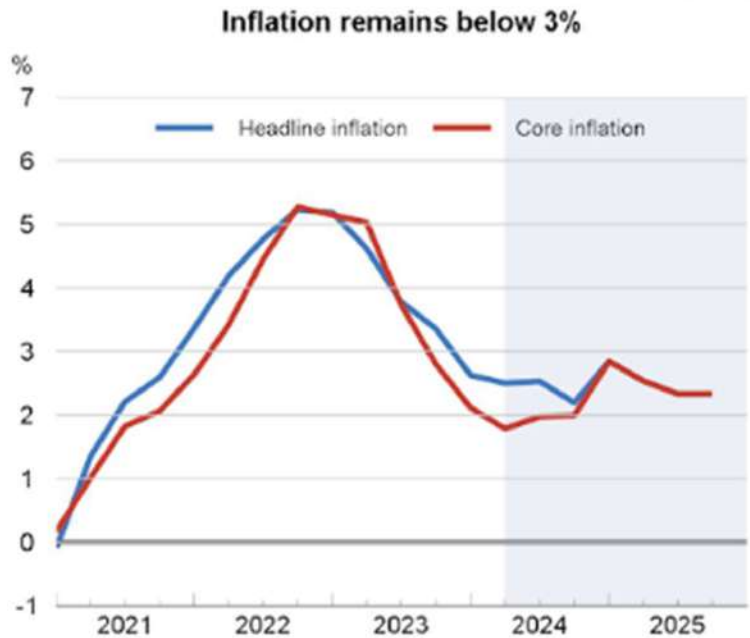
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Israel: Inflation and fiscal indicators



Source: OECD Economic Outlook115 database.

StatLink <https://stat.link/zc2t58>



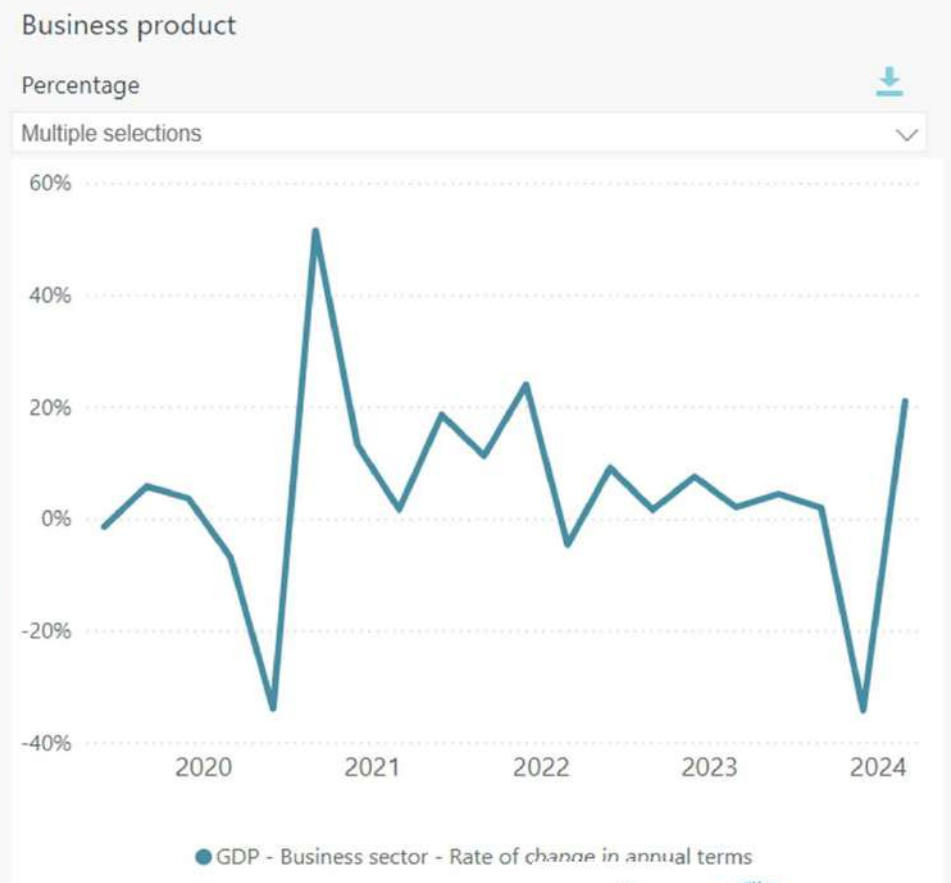


Economic indicators - Business Sector Activity

GDP and uses		As of:	Last Figure	Change [*]
1	Business product (NIS million) (1)	Q1-24	300,951	21.0%
2	Investment in principal industries [*] (2)	Q1-24	33.3%	3.0
3	Goods imports - investment goods, total (\$ million)	04/24	996	-9.6%
4	Net manufacturing exports [*]	04/24	4,528.5	-0.8%
5	High-tech manufacturing exports	04/24	1,796.3	-4.5%
6	Services exports	01/24	6,498.1	-1.8%

Employment and wages		As of:	Last Figure	Change [*]
7	Employee posts in the business sector (thousand)	02/24	2,542.3	0.4%
8	Average real monthly wage per employee post [*]	02/24	12,546	1.6%
9	Number of job vacancies	04/24	137,155	2.6%
10	Job vacancy rate (4)	04/24	4.4%	0.1

Other industries		As of:	Last Figure	Change [*]
11	Weighted net balance of the business sector [*]	04/24	.%	2.3
12	Industrial production index	02/24	94.6	-2.3%
13	Trade and services revenue index	02/24	172.8	-1.1%
14	Residential construction - Home building starts	12/23	108.0	-18.1%
15	Residential construction - Home building completions	12/23	117.2	-24.6%
16	Purchasing managers index (PMI)	03/24	51.0	1.8



The source: CBS data and Bank of Israel processing



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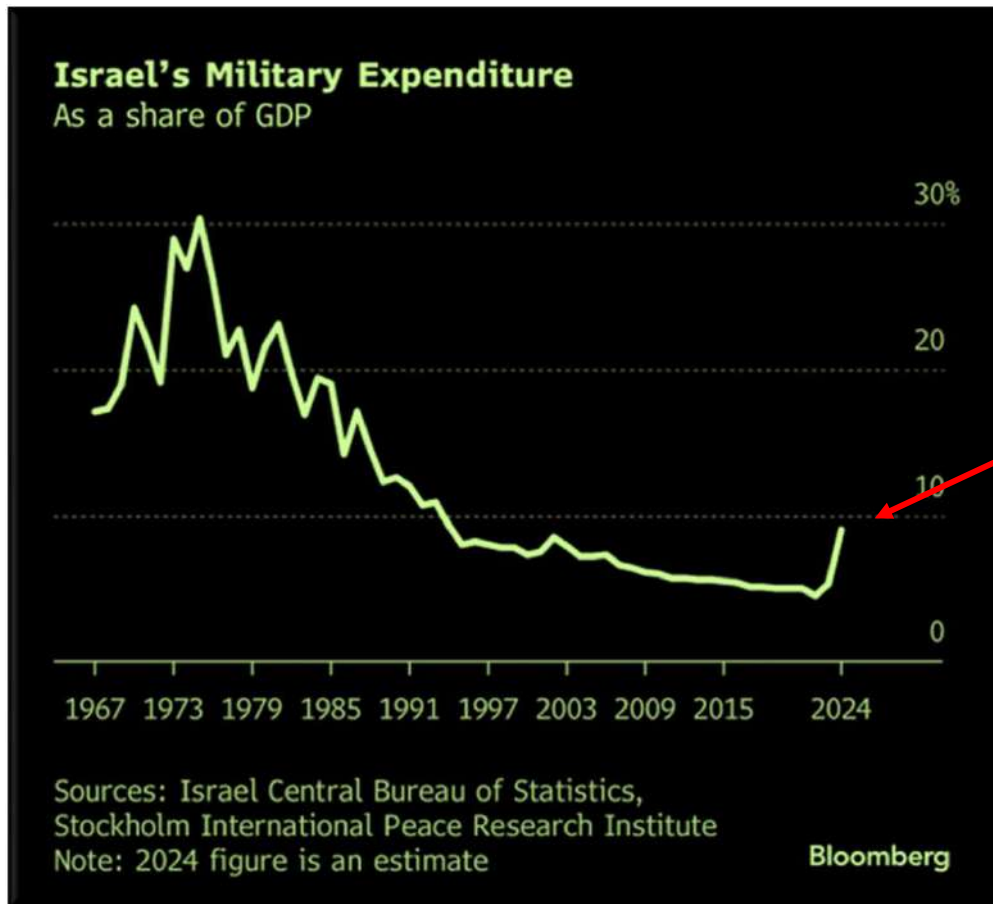


תוצר מקומי גולמי לנפש Gross Domestic Product per Capita



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Expected Slice of GDP for **TOTAL** Military Expenditures in 2024



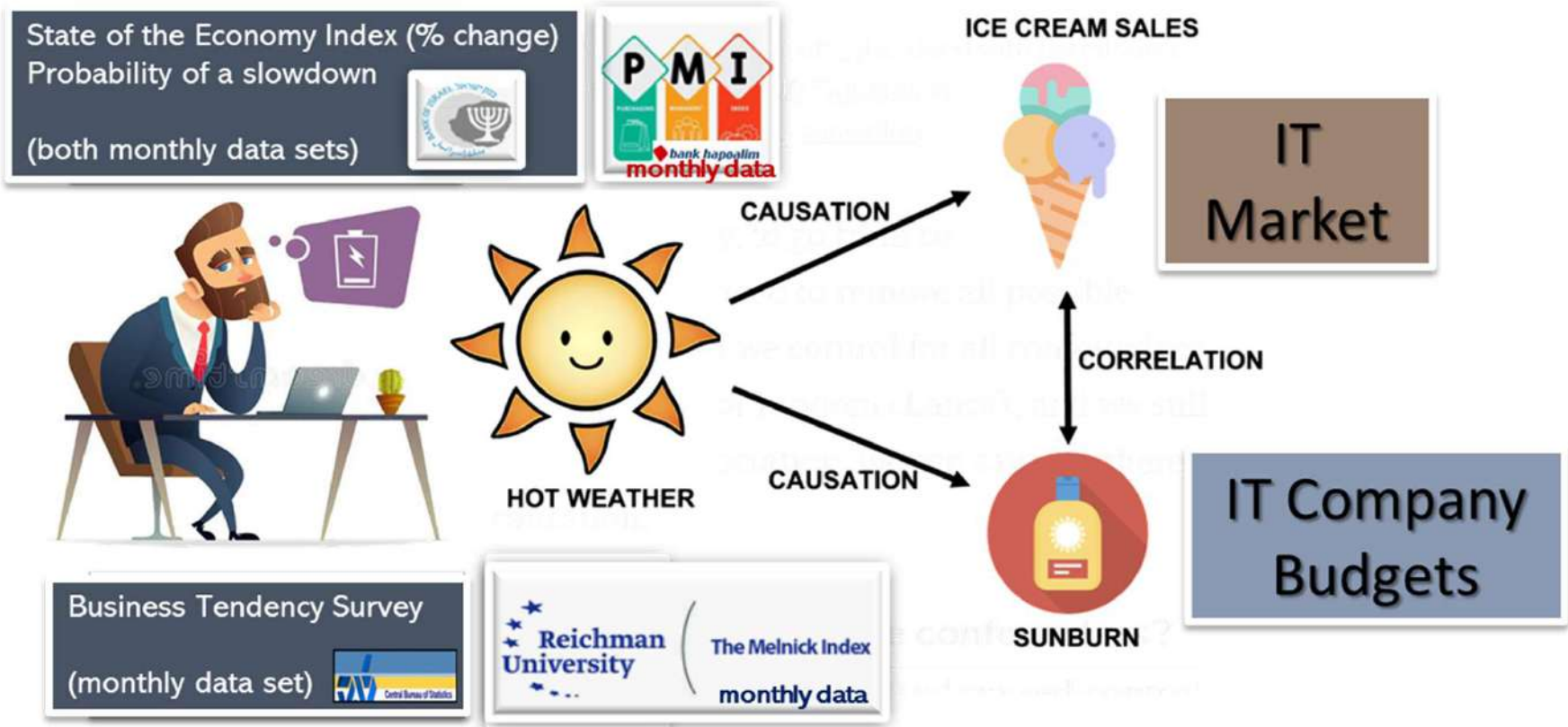
50 billion USD (estimate)



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How we check our economic forecasts

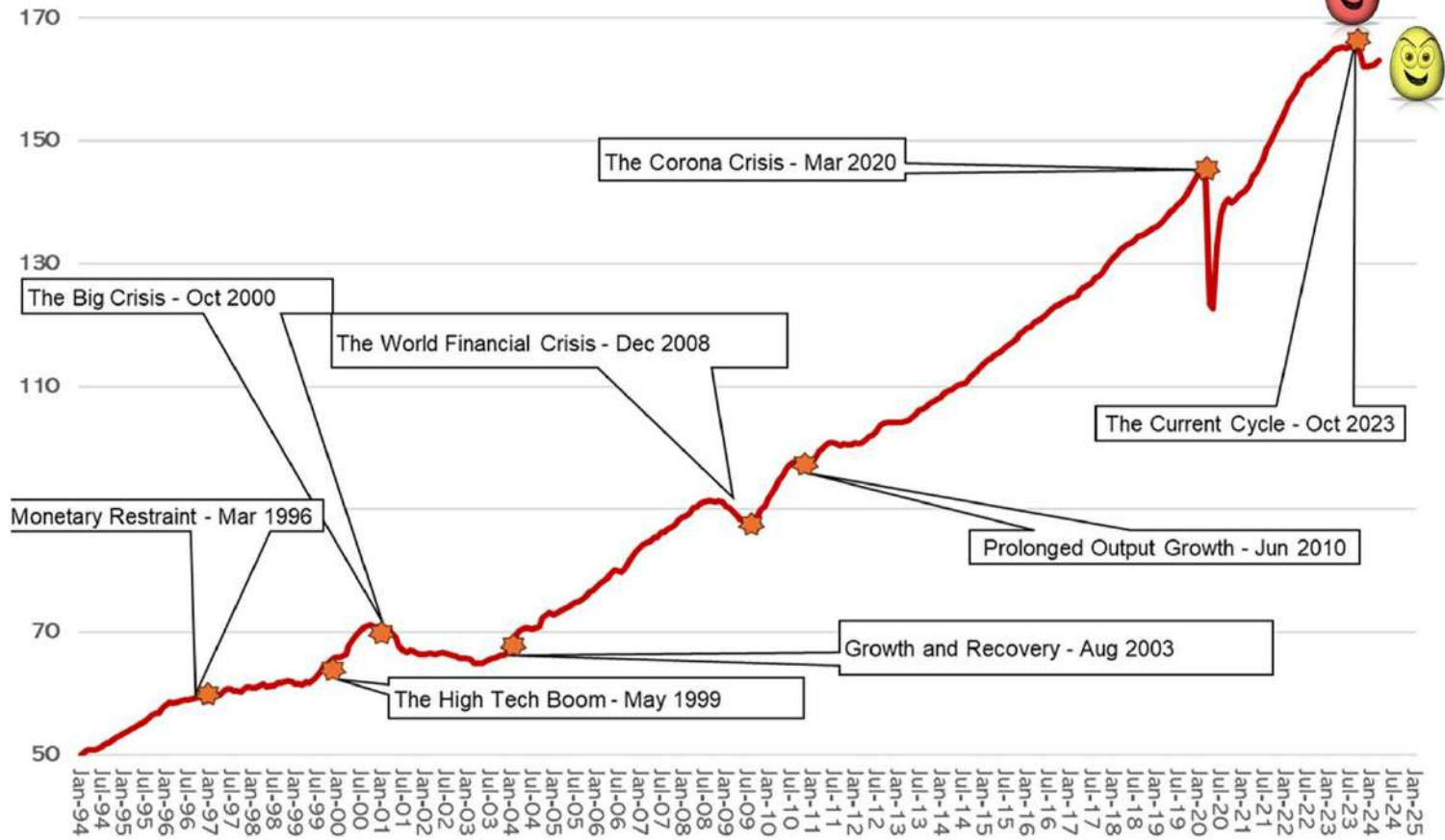




Business Cycles by the Melnick State of the Economy Index 1994-2024

The Melnick State of the Economy Index rose by 0.3 percent in April

The recovery of the business sector activity continues(main cause of the recovery is private consumption)



Prof. Rafi Melnick, Reichman University



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The Melnick State of the Israeli Economy Index
increased by 0.3 percent in April 2024.

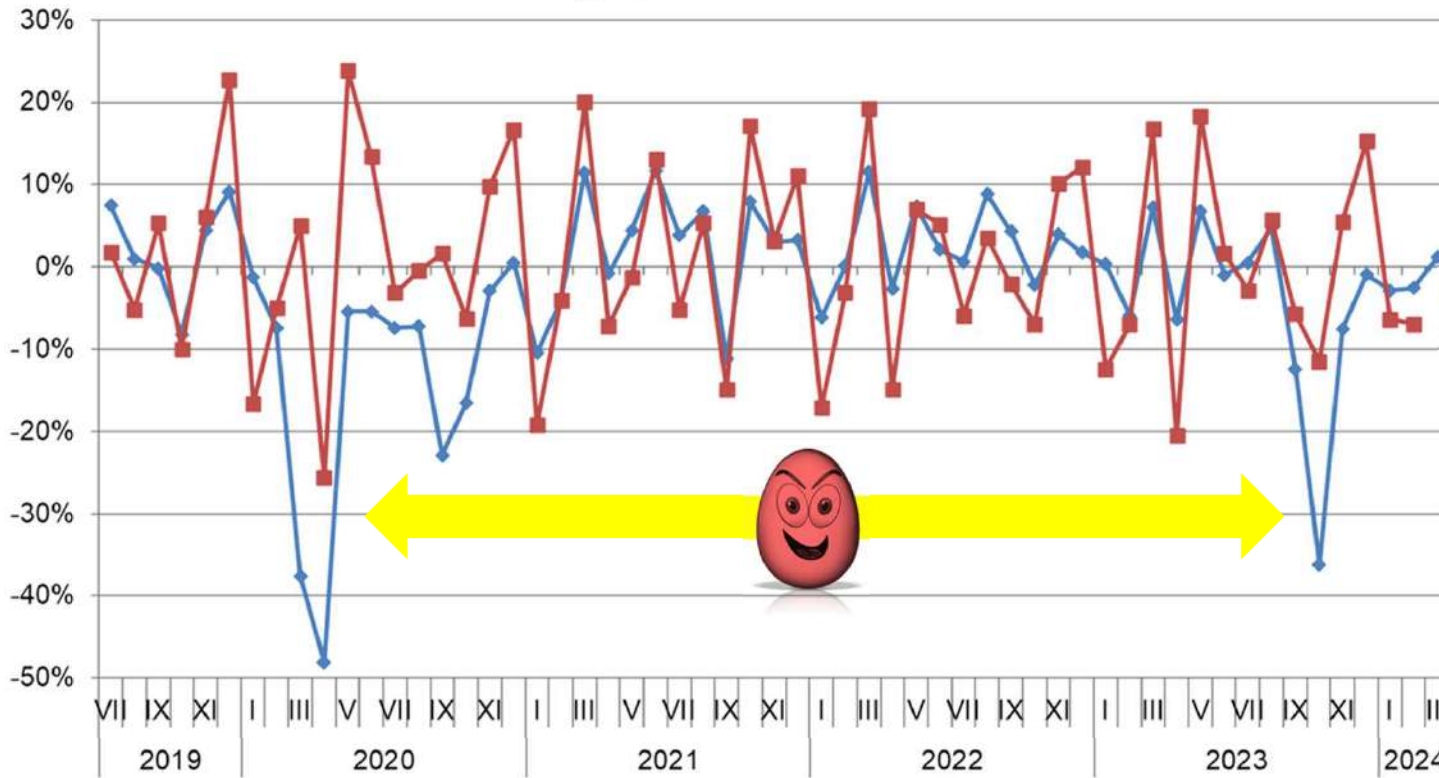
- **THE BUSINESS SECTOR** continues to grow although the level of economic activity has not yet returned to pre-war levels.
- **THE REVENUE IN COMMERCE AND SERVICES** continues to rise and is the main factor for economic growth in the second quarter of 2024.
- **THE INDUSTRIAL PRODUCTION INDEX** remains low and probably reflects a slow return to activity in the industry.
- **THE IMPORT INDEX**, corrected itself downward this month. It is possible that the jump in imports recorded the previous month was temporary.
- **THE NUMBER OF EMPLOYEE** posts in the business sector remains unchanged and reflects stability in the labor market.

Date	Industrial production	Revenue in commerce and services	Imports index	Employee posts in the business sector (a)	The Melnick Index	The change the index (percent)
Jul-23	132.3	174.8	155.4	2,684	164.6	0.1
Aug-23	139.5	178.5	152.3	2,707	165.1	0.3
Sep-23	133.3	171.1	148.7	2,720	165.3	0.1
Oct-23	125.3	147.4	141.2	2,627	163.1	-1.3
Nov-23	128.1	152.7	139.7	2,538	161.2	-1.2
Dec-23	123.9	165.1	139.5	2,581	161.2	0.0
Jan-24	127.2	172.6	140.4	2,600	161.4	0.1
Feb-24	123.9	171.1	149.3	2,599	161.5	0.1
Mar-24	123.5	172.5	161.0		162.0	0.3
Apr-24			148.1		162.5	0.3



Business Tendency Survey

מאזן כולל והשינוי במדד הפדיון לכלל ענפי המשק (נתונים מקוריים במחירים קבועים)
Total Balance and the Change in the Revenue Index for All Industries in the Economy



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.



מאזן כולל חדש

השינוי במדד הפדיון לכלל ענפי המשק

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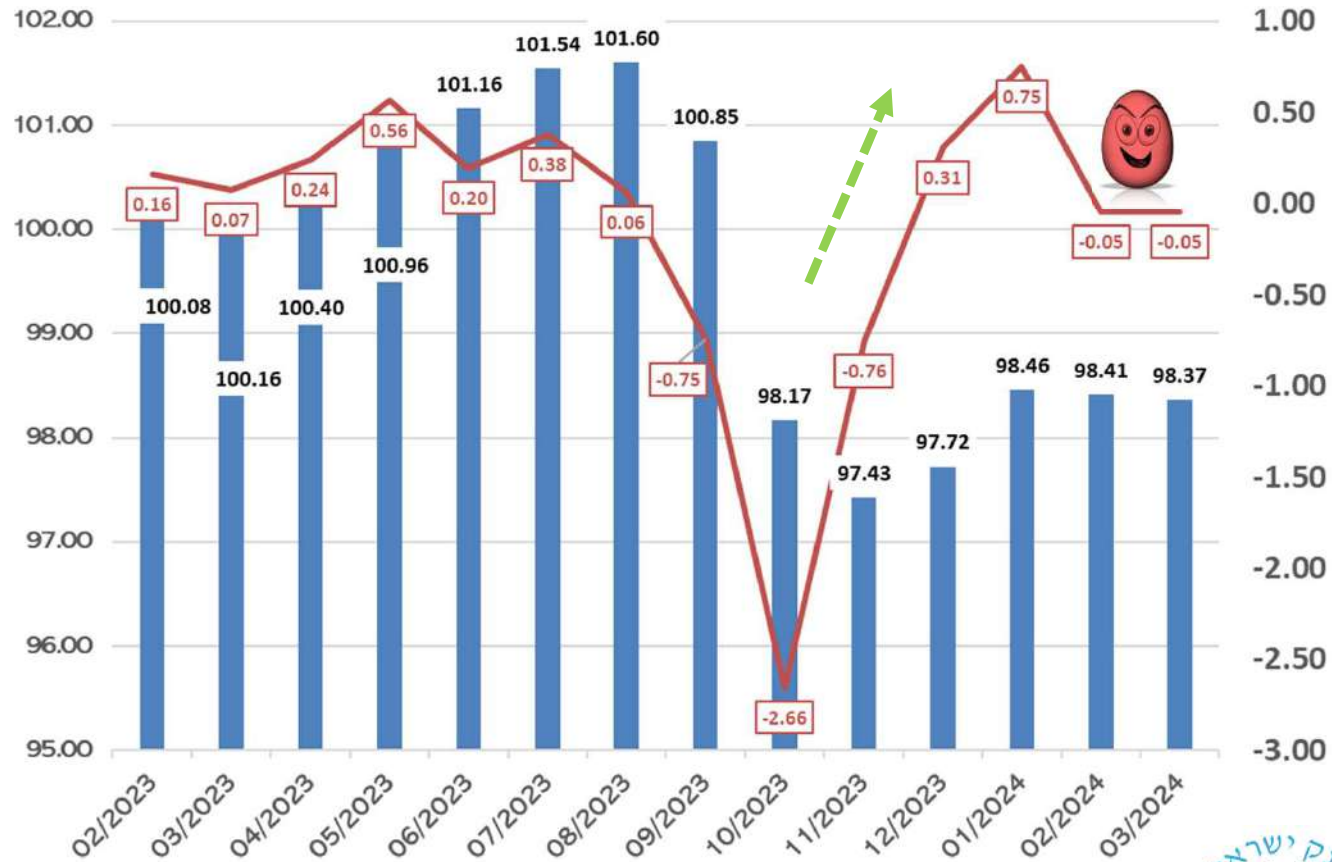


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State-of-the-Economy Index - level

The Composite State of the Economy Index is a synthetic indicator for examining the *direction of the development of real economic activity, in real time*



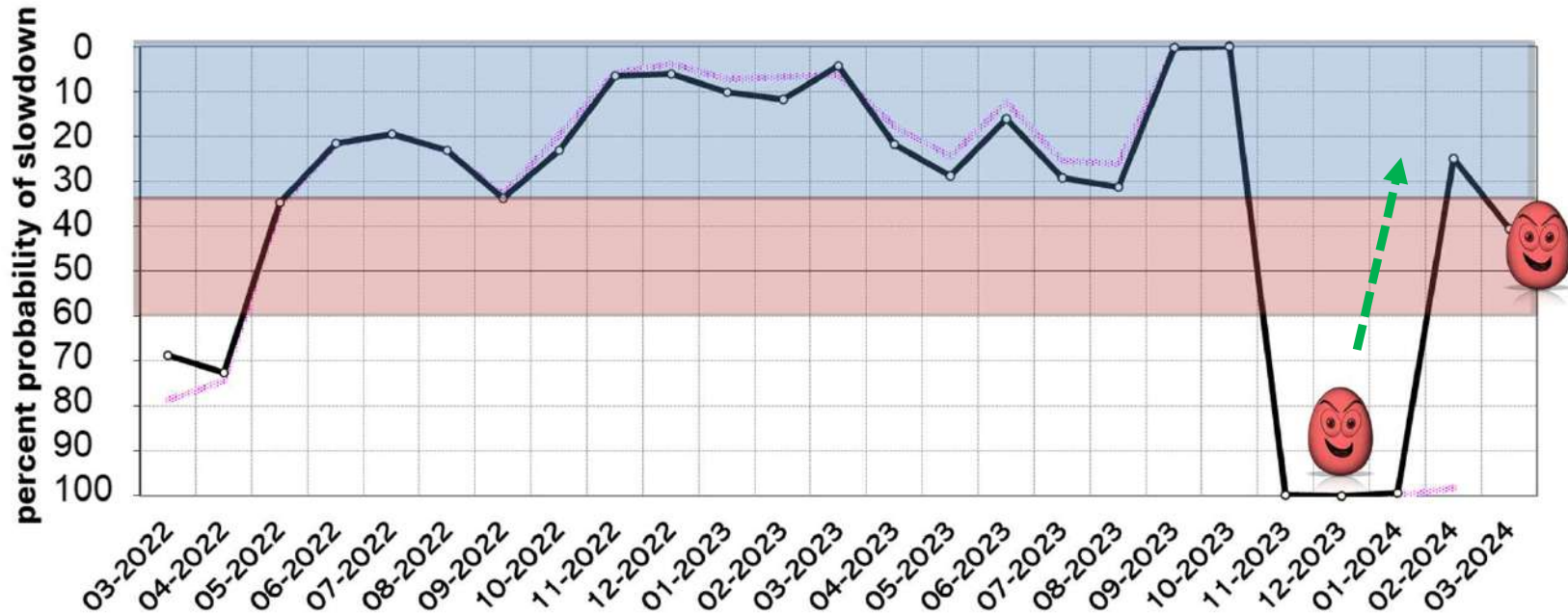
percent change



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Probability of slowdown relatively to the long-term growth



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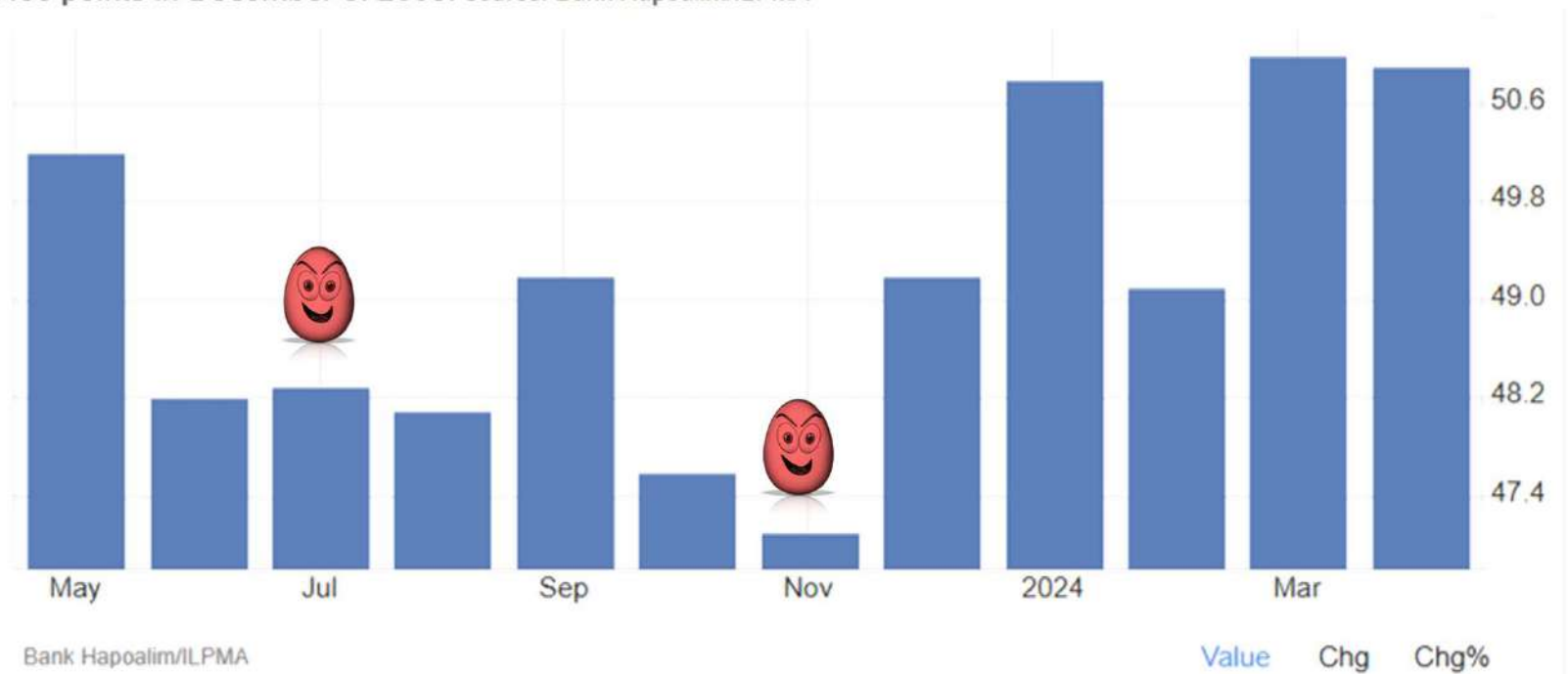
Israel Purchasing Managers Index

PMI: Seasonally Adjusted (sa) ◆ bank hapoalim

Manufacturing PMI in Israel decreased to 50.90 points in April from 51 points in March of 2024. Manufacturing PMI in Israel averaged 50.73 points from 2003 until 2024, reaching an all time high of 67.20 points in December of 2016 and a record low of 27.80 points in December of 2008. source: Bank Hapoalim/ILPMA

PMI summarizes whether market conditions, *as viewed by purchasing managers*, are expanding, staying the same, or contracting.

The purpose of the PMI is to provide *information about current and future business conditions* to company decision makers, analysts, and investors.



Bank Hapoalim/ILPMA

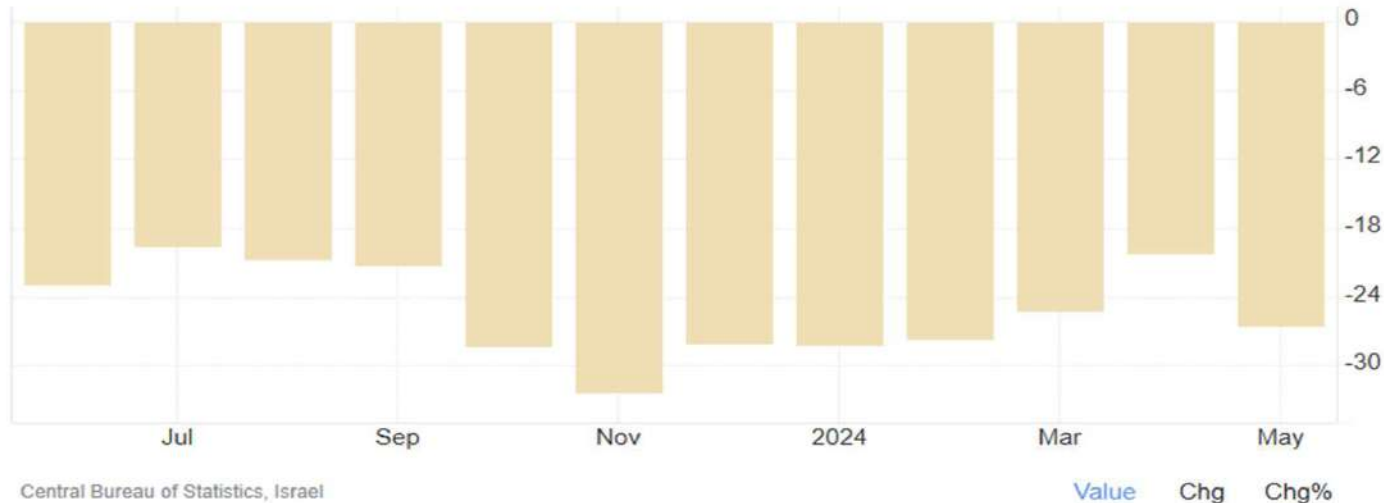
Value Chg Chg%



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Israel: Consumer Confidence Index

Consumer Confidence in Israel decreased to -26.49 points in May 2024, the lowest in three months, from -20.14 points in April. Consumer Confidence in Israel averaged -17.55 points from 2011 until 2024, reaching an all time high of 15.09 points in April of 2021 and a record low of -38.47 points in September of 2012. source: Central Bureau of Statistics, Israel



Central Bureau of Statistics, Israel

Value Chg Chg%

Feedback

Calendar	GMT	Reference	Actual	Previous	Consensus	TEForecast
2024-05-09	10:30 AM	Apr	-20	-25.2		-25
2024-06-10	10:50 AM	May	-26.5	-20.1		-18
2024-07-10	10:30 AM	Jun		-26.5		-17



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**”התגייסות אדירה”
התרומה של יהדות התפוצות למאמץ המלחמתי**

- 1.5 מיליארד דולר גויסו בתרומות
- כ-70 אלף מתנדבים הגיעו לישראל
- איגרות חוב בשווי 3 מיליארד דולר נמכרו

DATA12

Israel is not alone



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ISRAEL

Israel's economic freedom score is 70.1, making its economy the 26th freest in the 2024 *Index of Economic Freedom*. Its rating has increased by 1.2 points from last year, and Israel is ranked 2nd out of 14 countries in the Middle East/ North Africa region. The country's economic freedom score is higher than the world and regional averages. Israel's economy is considered "mostly free" according to the 2024 *Index*.

Despite an increasingly challenging security environment, Israel's economic competitiveness is anchored in strong protection of property rights and relatively low levels of corruption. The management of public finance still needs to be improved. Israel's overall regulatory framework promotes entrepreneurial activity, and its openness to global commerce supports productivity growth. The pace of regulatory reform is slightly behind that of other emerging economies. The labor market needs more flexibility to accommodate rapid economic transformation. Inflation has been modest, but upward pressures persist.





World Rank	Regional Rank	Country	Overall Score	Property Rights	Judicial Effectiveness	Government Integrity	Tax Burden	Government Spending	Fiscal Health	Business Freedom	Labor Freedom	Monetary Freedom	Trade Freedom	Investment Freedom	Financial Freedom
25	3	United States	70.1	95.1	76.4	74.8	74.8	48.7	0.0	84.8	77.7	73.8	75.6	80.0	80
26	2	Israel	70.1	82.1	84.4	65.5	59.3	50.7	58.6	80.8	58.0	78.4	83.0	70.0	70

2024 INDEX OF ECONOMIC FREEDOM

ECONOMIC FREEDOM: REGIONAL VARIATIONS (REGIONAL AVERAGE)

Regional Ranking	Middle East/ North Africa (57.4)
1	United Arab Emirates
2	Israel
3	Qatar

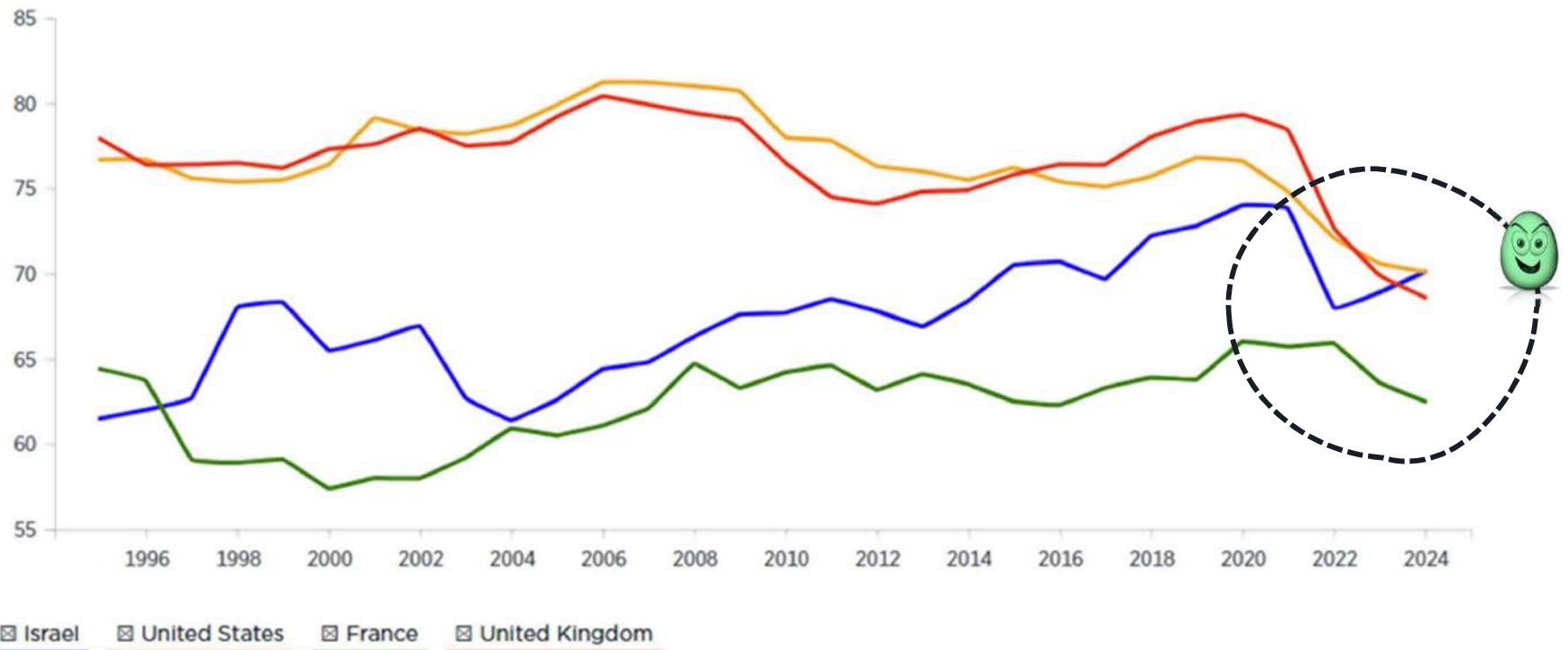


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2024 INDEX OF ECONOMIC FREEDOM

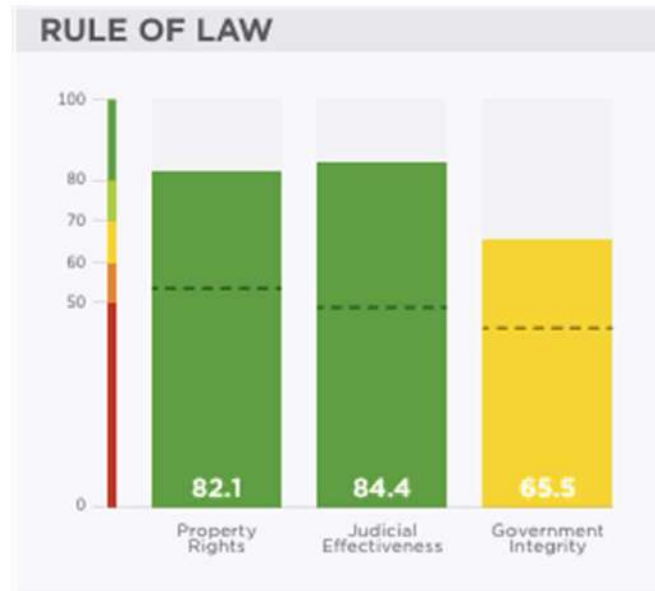
COMPARE COUNTRIES



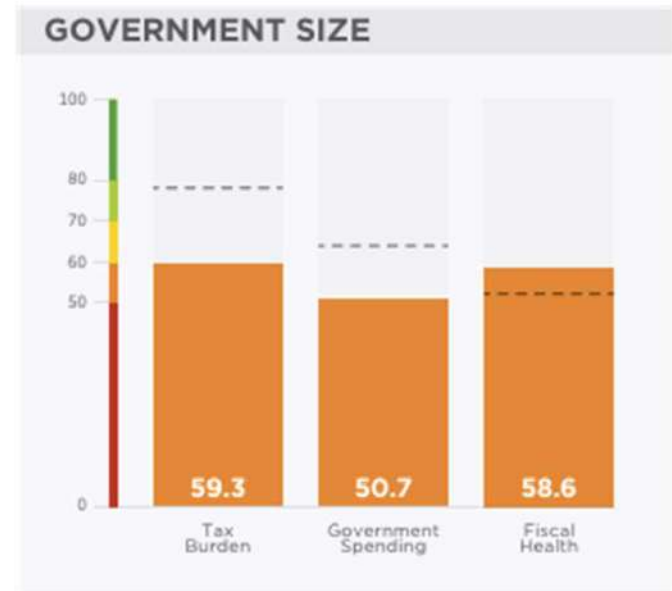
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12 ECONOMIC FREEDOMS | ISRAEL



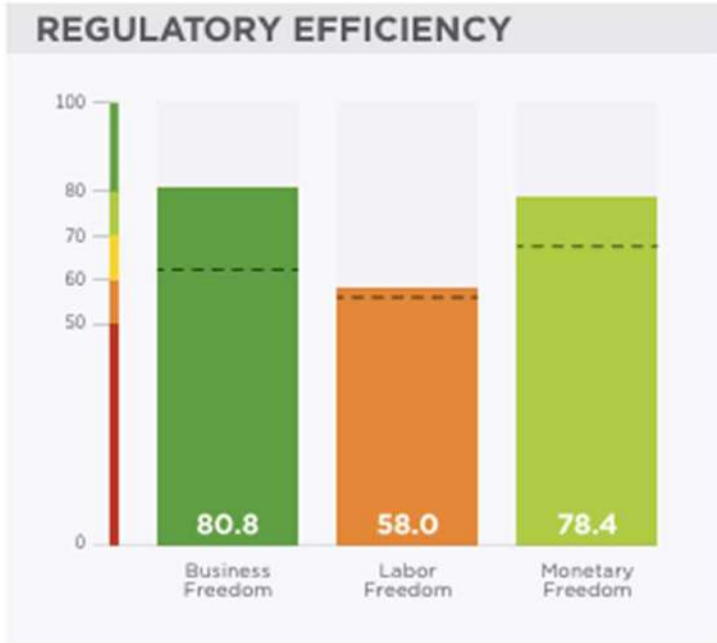
The overall rule of law is well respected in Israel. The country's property rights score is above the world average; its judicial effectiveness score is above the world average; and its government integrity score is above the world average.



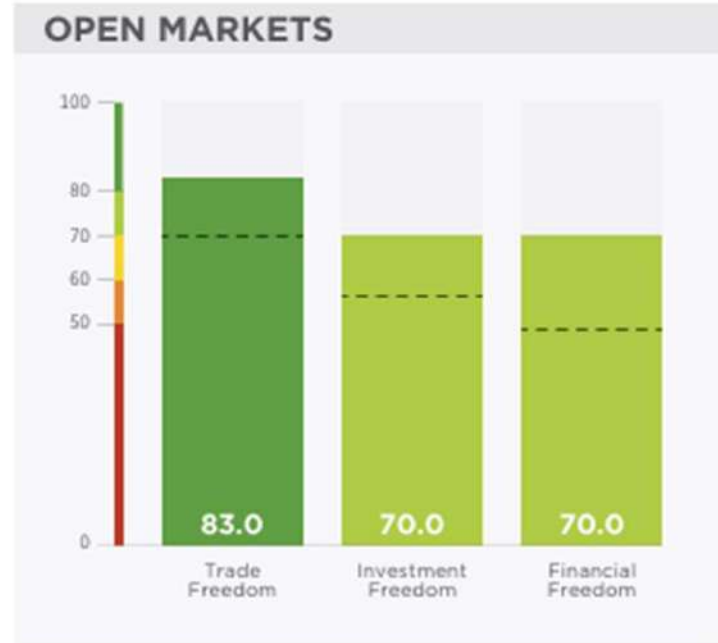
The top individual income tax rate is 50 percent, and the top corporate tax rate is 23 percent. The tax burden equals 32.2 percent of GDP. Three-year government spending and budget balance averages are, respectively, 40.5 percent and -4.6 percent of GDP. Public debt amounts to 60.7 percent of GDP.



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Israel's overall regulatory environment is well institutionalized and relatively efficient. The country's business freedom score is far above the world average; its labor freedom score is above the world average; and its monetary freedom score is well above the world average.



The trade-weighted average tariff rate is 3.5 percent, and more than 90 nontariff measures are in force. Economic competitiveness is generally facilitated by openness to foreign investment. Banking remains concentrated, but commercial banks offer a range of financial services that support the private sector.



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הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

Israel in Figures

Selected Data
From the Statistical Abstract of Israel

2022



הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

ישראל במספרים

נתונים נבחרים
מתוך שנתון סטטיסטי לישראל

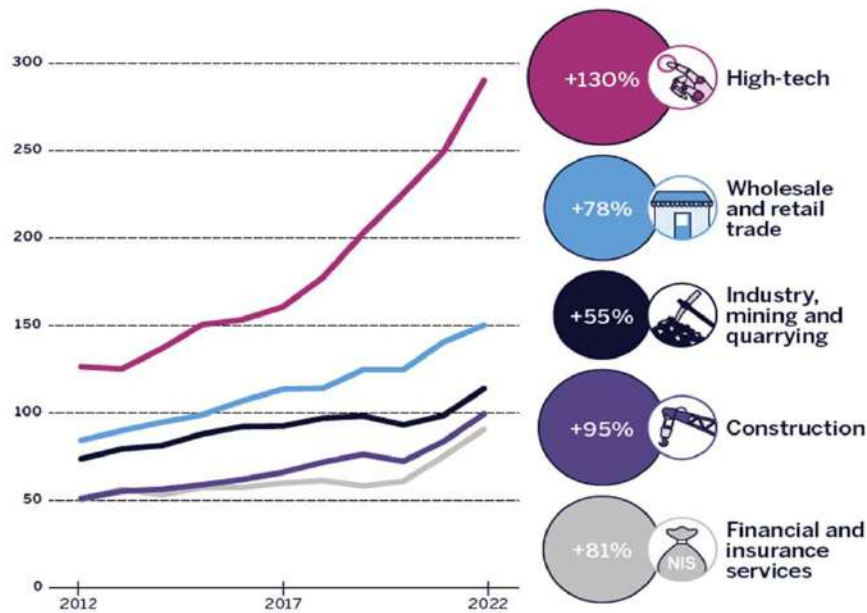
2023





High-Tech Output Grew More Than Any Other Sector Over The Past Decade

Output of selected sectors (in NIS billions) and its growth rate between 2012-2022

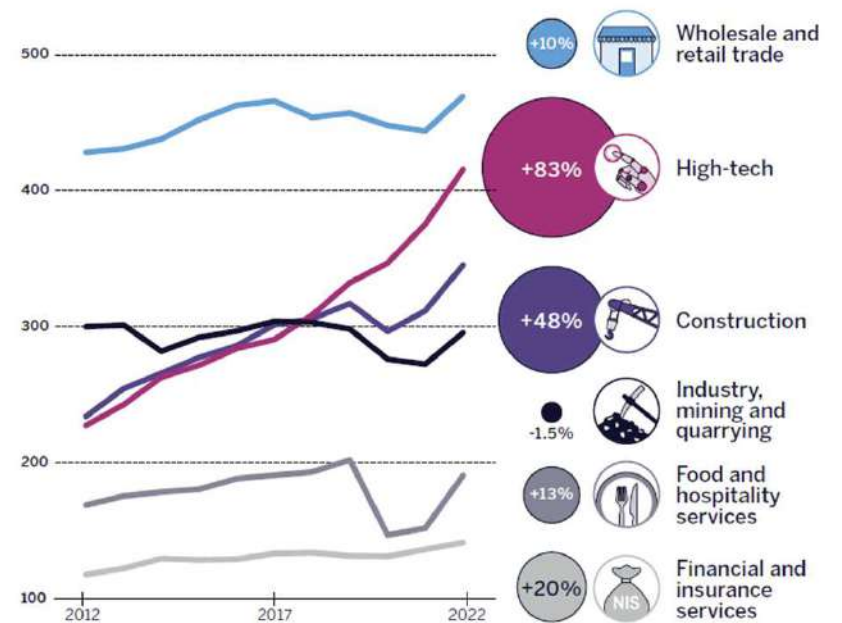


Source: Innovation Authority adaptation of CBS data

High-tech data does not include the communications sector and public R&D centers.
 Industry sector data does not include high-tech.
 Wholesale and retail trade includes motor vehicle repairs.

11 The No. of High-Tech Employees Grew Three Times More Than The General Economy

No. of employees in selected sectors (in hundreds of thousands) and growth in no. of employees 2012-2022



Source: Innovation Authority adaptation of CBS data

High-tech data does not include the communications sector and public R&D centers.
 The industrial sector does not include high-tech.
 Wholesale and retail trade includes motor vehicle repairs.



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2 POPULATION

The population of Israel is constantly growing, and its demographic characteristics are changing. Data on the population are necessary, in order for government institutions to provide appropriate long-term and short-term responses to the needs of the population, including urban planning and formulation of social and economic policies.

The data relate to the demographic characteristics of the population of Israel: population growth and its sources; the geographic distribution of the population and population density; immigration to Israel and international migration. In addition, data are presented on the structure of households and families, as well as on the main components of change in the family (fertility, marriage, divorce). This year, particular emphasis was placed on characteristics of personal and family status of men and women in Israel.

The data are based on the last Population and Housing Census (2008), as well as on the reports of residents, as recorded in the Population Register after the Census (births, deaths, immigrants, address changes, marriages, divorces, etc.).

Selected Data, 2021

Population	Immigration to Israel and International Migration	Family
Population of Israel (end of year) 9,453,000 persons	Immigration to Israel Immigrants since the establishment of the state 3.3 million	Marriage and divorce (2020) Couples who married 39,984 Couples who divorced 15,307
Jews and Others* 78.9%	Immigrants in 2021 25,500 (compared with 19,700 in 2020)	Live births and fertility Live newborns 185,040 Total fertility rate (average number of children per woman) 3.00
Arabs 21.1%	Migration of Israelis abroad (2020) Departed from Israel 20,800 Returned to Israel 10,100	Terminations of pregnancy Applications to committees for termination of pregnancy 16,591 Rate of applications per 1,000 women aged 15-49 7.7
Annual population growth rate 1.8% (compared with 1.6% in 2020)	Work permit holders from abroad Entered Israel 41,600 (compared with 26,000 in 2020) Departed from Israel 35,400 (compared with 22,300 in 2020)	Households and families Private households 2,766,800 Average number of persons per household 3.23 Nuclear families 2,204,000

* non-Arab Christians, members of other religions, and those not classified by religion in the Population Register.

2 אוכלוסייה

אוכלוסיית ישראל גדלה ומשתנה כל העת, ושינויים חלים במאפייניה הדמוגרפיים. נתונים על האוכלוסייה נדרשים לשם היערכות מוסדות המדינה למתן מענה לצורכי האוכלוסייה (בטווח הקצר ובטווח הארוך), ובכללם תכנון עירוני וקביעת מדיניות במגוון נושאים חברתיים וכלכליים.

נושא זה כולל נתונים על התכונות הדמוגרפיות של אוכלוסיית ישראל: גידול האוכלוסייה ומקורותיו; פיזור האוכלוסייה וצפיפותה; עלייה והגירה בין-לאומית. כמו כן, מוצגים נתונים על המבנה של משקי הבית והמשפחות ועל רכיבי השינוי העיקריים של המשפחה (פרייה, נישואין ונירושין). השנה הושם דגש מיוחד על אוכלוסיית בני 75 ומעלה, לרגל חגיגות 75 שנה למדינת ישראל.

הנתונים מבוססים על מפקד האוכלוסין והדיר 2008 ועל דיווחי התושבים כפי שתועדו במרשם האוכלוסין לאחר המפקד (לידות, פטירות, עולים, שינוי כתובת, נישואין, גירושין וכו').

נתונים נבחרים, 2022

משפחה	עלייה והגירה בין-לאומית	אוכלוסייה
נישואין וגירושין (2021) זוגות שנישאו 51,605 זוגות שהתגרשו 16,300	עלייה עולים מקום המדינה 3.4 מיליון עולים בשנת 2022 74.7 אלף (לעומת 25.5 אלף בשנת 2021)	אוכלוסיית ישראל (סוף שנה) 9,662- כ- מיליון נפש יהודים ואחרים 78.9%
לידות חי ופרייה יילודים חיים 181,193 שיעור פרייה כולל 2.89 ילדים בממוצע לאישה	הגירה של ישראלים לחו"ל (2021) יציאו מ ישראל 18.2 אלף חזרו לישראל 16.8 אלף	ערבים 21.1%
הפסקות היריון פניות של נשים לועדות להפסקת היריון 15,890 שיעור פניות ל-1,000 נשים בנות 15-49 7.2	עובדים מחו"ל בעלי אשרת עבודה נכנסו לישראל 67.8 אלף (לעומת 41.6 אלף בשנת 2021) יציאו מישראל 55.1 אלף (לעומת 35.4 אלף בשנת 2021)	קצב הגידול השנתי של האוכלוסייה 2.2% (לעומת 1.8% בשנת 2021)
משקי בית ומשפחות משקי בית פרטיים 2,857,300 מספר נפשות ממוצע למשק בית 3.19 משפחות גרעיניות 2,251,400		

4 EDUCATION

Education is a process of learning, in which a person acquires knowledge, professional expertise, skills, values, and attitudes. Education enables people to realize their abilities, so that the state can improve its human capital and maximize the human potential of its citizens.

The data on education include the following: expenditure on education; the education system (students and teaching staff); higher education and vocational training courses. In addition, data are presented on special topics in education.

The data are obtained from the Ministry of Education, as well as from institutions of higher education, the Ministry of Economy and Industry, from Central Bureau of Statistics surveys, and from other sources.

Selected Data, 2020/21

National Expenditure on Education (2021)

NIS 124.6 billion
8.0% of the GDP
(compared with
NIS 115.7 billion,
8.3% of the GDP, in 2020)

The Education System

Schools
Students
1.880.5 million
In primary education
1.097.7 million
In secondary education
782,800
Teaching staff
177,700

Day care centres and pre-primary education
Children aged 0-7
845,000
Teaching staff in pre-primary education
19,500

Matriculation Examinees
81.4% of examinees were entitled to a matriculation certificate

Dropping out of the education system (under Ministry of Education supervision)

during 2020/21 and before 2021/22
11,000 (1.3%)
of the students in grades 7-12 (excl. Jerusalem Arab students) dropped out of the education system and did not enroll in an alternative educational framework

Higher Education, Short-Cycle Tertiary Education (Non-Academic), and Vocational Training Courses

Students at universities, academic colleges, and academic colleges of education
298,900
Thereof:
First degree students 211,600
Second degree students 66,400
Third degree students 12,200
Teaching diploma students 8,700

Students at the Open University
52,800
Thereof:
First degree students 49,400
Second degree students 2,700

Recipients of degrees from all institutions of higher education

84,100

Thereof:

First degree 52,200

Second degree 26,300

Third degree 1,600

Teaching diploma 4,100

Students in short-cycle tertiary education (non-academic)
61,000

Students in vocational training courses for adults supervised by the Ministry of Labor, Social Affairs and Social Services (2020)
38,100

4 חינוך והשכלה

חינוך הוא תהליך של למידה, שבו האדם רוכש ידע, התמקצעות, מיומנויות, ערכים או עמדות. חינוך מאפשר לאדם לממש את יכולותיו ומאפשר למדינה להשביח את ההון האנושי שלה ובכך למצות את הפוטנציאל האנושי של אזרחיה.

נתוני חינוך והשכלה כוללים את ההוצאה לחינוך; מערכת החינוך (תלמידים ועובדי הוראה); השכלה גבוהה והכשרה מקצועית. כמו כן, מובאים נתונים על נושאים מיוחדים בחינוך והשכלה.

הנתונים מתקבלים ממשרד החינוך, ממוסדות להשכלה גבוהה, ממשרד הכלכלה והתעשייה, מסקרי הלשכה המרכזית לסטטיסטיקה ועוד.

נתונים נבחרים, תשפ"ב (2021/22)

סטודנטים לתואר ראשון באוניברסיטה הפתוחה

48.3 אלף

מקבלי תארים

מכל המוסדות להשכלה גבוהה

88.8 אלף

מהם:

תואר ראשון 54.6 אלף

תואר שני 27.6 אלף

תואר שלישי 1.7 אלף

תעודה אקדמית 4.8 אלף

תלמידים בחינוך על-תיכון (לא-אקדמי)

60.5 אלף

מקבלי תעודה בחינוך על-תיכון (לא-אקדמי) (2021)

16.8 אלף

תלמידים בקורסים להכשרה מקצועית למבוגרים בפיקוח משרד הכלכלה והתעשייה (2021)

63.3 אלף



נבחנים בבחינות הבגרות

80.4%

מהנבחנים היו זכאים לתעודת בגרות

נשירת תלמידים ממערכת החינוך (שבפיקוח משרד החינוך) (בתשפ"ב - 2021/22 ובמעבר לשנת תשפ"ג 2022/23)

16.1 אלף (1.4%)

מתלמידי כיתות ז-יב (לא כולל ערביי ירושלים) נשרו מהמערכת מהם 11.8 אלף לא עברו למסגרת לימוד חלופית

השכלה גבוהה, השכלה על-תיכונית (לא-אקדמית) והכשרה מקצועית

סטודנטים באוניברסיטאות, במכללות האקדמיות ובמכללות האקדמיות לחינוך

303.1 אלף

מהם:

לתואר ראשון 214.5 אלף

לתואר שני 68.7 אלף

לתואר שלישי 12.1 אלף

לתעודה אקדמית 7.8 אלף

הוצאה לאומית לחינוך (2022)

132.0 מיליארד ש"ח

7.5% מהתמ"ג

(לעומת 123.2 מיליארד ש"ח, 7.8% מהתמ"ג, בשנת 2021)



מערכת החינוך

בחינוך תלמידים

1.91 מיליון

בחינוך היסודי

1.119 מיליון

בחינוך העל-יסודי

795.9 אלף

עובדי הוראה

194.2 אלף

מעונות יום

חינוך קדם-יסודי

ילדים בני 7-0

884.5 אלף

נגנות בנגנים

26.3 אלף

15 BUSINESS

Data on the population of businesses include financial estimates and demographic data, as well as various indices that provide a basis for characterizing the structure of the Israeli economy and the activity of industries in the economy.

The data include the following topics: active businesses in the economy; the annual revenue of industries in the economy and chain stores; credit card purchases of private consumers; financial data on businesses based on the Survey of Industries (the production account and the balance sheet account); and information about trends in businesses.

The data are obtained from business surveys conducted by the Central Bureau of Statistics and from administrative sources.

Selected Data, 2021

Active Businesses

Active businesses in the business and non-business sectors
About 652,900



Business births

About 54,600
(8.4% of all active businesses)

Business deaths (2019)

The highest percentage of business deaths was in Accommodation and food services activities
11.4%

Revenue

Total revenue of dealers in the economy (excluding diamonds)
About NIS 2,467 billion

Chain Stores

The revenue (sales) index of chain stores increased by 5.2% compared with 2020

Credit Card Purchases by Private Consumers

Food and beverages 14.9%
Industrial goods 17.4%
Services 20.1%
Other goods and services 47.6%

The sales value index of credit card purchases by private consumers increased by 14.9% compared with 2020

Production Account of the Business Sector (2019)

Jobs
About 3,181,000

Gross value added
About NIS 775 billion

Compensation for jobs
About NIS 469 billion

Balance Sheet Account of the Business Sector (2019)

Total assets in industries
About NIS 3,287 billion
A 4.8% increase compared with 2018

15 עסקים

המידע על אוכלוסיית העסקים במשק הישראלי כולל אומדנים כספיים, נתונים דמוגרפיים ומדדים שונים על עסקים, המאפשרים לאפיין את מבנה המשק הישראלי ואת הפעילות בענפי הכלכלה. מוצגים נתונים על עסקים פעילים במשק; נתוני פדיון שנתיים בכלל ענפי הכלכלה וברשתות השיווק; רכישות של צרכנים פרטיים בכרטיסי אשראי; נתונים כספיים של עסקים, המבוססים על סקר ענפי הכלכלה (חשבון הייצור והחשבון המאזני); מידע על מגמות בעסקים. הנתונים מתקבלים מסקרי עסקים של הלשכה המרכזית לסטטיסטיקה וממקורות מינהליים.

נתונים נבחרים, 2022

חשבון הייצור במגזר העסקי (2020)
משרות
כ-2,877 אלף

ערך מוסף גולמי
כ-764 מיליארד ש"ח

תמורה למשרות
כ-448 מיליארד ש"ח

החשבון המאזני במגזר העסקי (2020)
סך כל הנכסים בענפי הכלכלה
כ-3,329 מיליארד ש"ח
עלייה של 1.2% לעומת שנת 2019



פדיון סך הפדיון של העוסקים במשק (ללא יהלומים)
כ-2,862 מיליארד ש"ח

רשתות שיווק מדד סך הפדיון (מכירות) של רשתות השיווק
עלה ב-0.2% לעומת שנת 2021

רכישות של צרכנים פרטיים בכרטיסי אשראי
מזון ומשקאות 14.8%
מוצרי תעשייה 16.9%
שירותים 21.1%
מוצרים ושירותים אחרים 47.2%
מדד ערך הרכישות של צרכנים פרטיים בכרטיסי אשראי
עלה ב-5.9% לעומת שנת 2021

עסקים פעילים עסקים פעילים במגזר העסקי ובמגזר הלא-עסקי
כ-684,150



לידות עסקים
כ-57,700 (8.4% מכלל העסקים הפעילים)
מיתות עסקים (2020)
כ-32,900 (5.3% מכלל העסקים הפעילים)
האחוז הגבוה ביותר של מיתות עסקים היה בענף שירותי האירוח והאוכל
8.3%

17 SCIENCE, TECHNOLOGY, AND COMMUNICATIONS

A country's economic growth is largely dependent on the ability to generate scientific and technological improvements, and to assimilate them in processes of production as well as in new goods and services. These improvements are created through innovative scientific and technological activities which turn abstract ideas into durable goods and services, and they constitute the main source of economic growth as well as increased quality of life and life expectancy. This topic presents a range of data on, among others, the following areas: scientific and technological activity in the Israeli economy; expenditure on civilian R&D in the business and higher education sectors; separately budgeted research in the higher education sector; production in Information and Communications Technologies (ICT) and high-tech; and use of ICT. The data are obtained from various administrative sources, and from Central Bureau of Statistics surveys.

Selected Data, 2021

National Expenditure on Civilian R&D
National expenditure on civilian R&D
NIS 87.7 billion
5.6% of the GDP – more than in all OECD countries (compared with NIS 81.2 billion, 5.8% of the GDP, in 2020)
Expenditure on civilian R&D in the business sector
91.0% of the total expenditure
Expenditure on Separately Budgeted Research in the Higher Education Sector (2020/21)
NIS 2.35 billion
A 4.2% decrease compared with 2019/20
Startup Companies (2020)
Active companies **4,810**
Thereof: Companies that opened **471**
Employee jobs **31,300**

High-Tech
Employees in high-tech **385,200**
(11.1% of all employees in the economy)
Employee jobs in high-tech **349,500**
(9.6% of all employee jobs in the economy)
A **29.0%** increase between 2011 and 2021
Average monthly wages per employee job in high-tech
NIS 26,428
A **6.3%** increase compared with 2020 (NIS 24,872)



Information and Communications Technologies (ICT)
ICT – Gross value added
NIS 112.7 billion at 2011 prices
(12.7% of total GDP in the business sector)
ICT – Exports
NIS 143.5 billion at 2011 prices
(31.9% of all exports of goods and services in the economy)
Use of ICT
90.3% of all persons aged 20 and over used the Internet (Social Survey)
Expenditure of households on communications products (2019)
About **NIS 494** on average per month

מדע, טכנולוגיה ותקשורת 17

הצמיחה הכלכלית של מדינה תלויה רבות ביכולתה ליצור שיפורים טכנולוגיים ומדעיים ולהטמיע אותם בתהליכי הייצור ובמוצרים ושירותים חדשים. שיפורים אלו הם תולדה של פעולות מדעיות וטכנולוגיות חדשניות והפכות רעיונות מופשטים למוצרים ושירותים בני-קיימה, והם המקור העיקרי לצמיחה כלכלית ולעלייה באיכות החיים ובתוחלת החיים. בנושא זה מוצגים מגוון נתונים על הפעילות המדעית והטכנולוגית במשק הישראלי, על הוצאה למרפ אזרחי במגזר העסקי ובמגזר ההשכלה הגבוהה, על מחקרים בעלי מימון מיוחד (תקציב נפרד) במגזר ההשכלה הגבוהה, על פעולות הייצור בענפי טכנולוגיות המידע (ICT) ובענפי ההייטק, על שימוש בטכנולוגיות מידע ותקשורת ועוד. הנתונים מתקבלים ממגוון מקורות מינהליים ומסקרי הלשכה המרכזית לסטטיסטיקה.

נתונים נבחרים, 2022

מקבלי תואר ראשון בתחומי המדע והטכנולוגיה
14,129
(25.9% מכלל מקבלי תואר ראשון)
ענפי טכנולוגיות מידע ותקשורת (ICT) (2021)
תוצר ענפי ה-ICT
112.7 מיליארד ש"ח במחירי 2011
12.7% מכלל התמ"ג במגזר העסקי
יצוא ענפי ה-ICT
143.5 מיליארד ש"ח במחירי 2011
31.9% (הסחורות והשירותים במשק)
שימוש בטכנולוגיות מידע ותקשורת
91.9% מבני 20 ומעלה השתמשו באינטרנט (הסקר החברתי)
הוצאה של משקי בית על מוצרי תקשורת (2021)
כ- **491 ש"ח** בממוצע לחודש

הייטק
ערך מוסף נולמי בענפי ההייטק (2020)
182.5 מיליארד ש"ח (23.9% מסך הערך המוסף הנולמי במגזר העסקי)
שכירים בתחום ההייטק
426.9 אלף (11.7% מכלל השכירים במשק)
משרות שכיר בתחום ההייטק
390.0 אלף (9.9% מכלל משרות השכיר במשק)
עלייה של **44.0%** בשנים 2011-2022
שכר חודשי ממוצע למשרת שכיר בתחום ההייטק
27,787 ש"ח
עלייה של **5.1%** לעומת שנת 2021 (26,428 ש"ח)
השכלה מדעית וטכנולוגית ותארים מתקדמים (תשפ"ב; 2021/22)
סטודנטים חדשים לתואר ראשון בתחומי המדע והטכנולוגיה
17,425 (29.7% מכלל הסטודנטים החדשים לתואר ראשון)

הוצאה לאומית למחקר ופיתוח אזרחי
הוצאה לאומית למחקר ופיתוח אזרחי
106.1 מיליארד ש"ח
6.1% מהתמ"ג - יותר מכלל מדינות ה-OECD (לעומת 91.3 מיליארד ש"ח, 5.8% מהתמ"ג, בשנת 2021)
הוצאה למרפ אזרחי במגזר העסקי
92.3% מכלל ההוצאה
מחקרים בעלי מימון מיוחד (תקציב נפרד) במגזר ההשכלה הגבוהה (2021/22)
2.44 מיליארד ש"ח
עלייה של **3.7%** לעומת שנת תשפ"א (2020/21)
חברות הונק (2021)
חברות פעילות
4,801
מהן: חברות שנפתחו
498
משרות שכיר
35.3 אלף



25 GENERAL GOVERNMENT SECTOR

Israel's general government sector includes the government ministries, the National Insurance Institute, local authorities, the national institutions, as well as non-profit institutions whose main expenditures are financed by the government.

The general government sector is of great importance in the areas of economic regulation and production of services for individual and collective consumption.

The information includes economic data on expenditures, revenue, deficit, and debt of the general government sector. Data is also presented on official development assistance (ODA) that Israel provides to developing countries.

The data are obtained from the Ministry of Finance, the Ministry of Defense, the National Insurance Institute, local authorities, financial reports of public non-profit institutions and of national institutions, and other sources.

Selected Data, 2021

General Government Expenditures

NIS 644.6 billion
 40.8% of the GDP
 (compared with NIS 645.8 billion,
 45.4% of the GDP, in 2020)

Thereof:
 NIS 348.7 billion
 for general government
 consumption expenditure

General Government Revenue

NIS 586.6 billion
 (37.2% of the GDP)

Thereof:
 87.2%
 from tax revenue

General Government Overall Deficit

NIS 58.0 billion
 3.7% of the GDP
 (compared with NIS 153.0 billion,
 10.8% of the GDP, in 2020)

Government Debt
 NIS 1,068.1 billion

Debt-Product Ratio
 67.7% of the GDP

General Government Debt
 NIS 1,076.1 billion

Official Development Assistance (ODA)
 408.9 million dollars
 (0.085% of the Gross National Income)



25 המגזר הממשלתי

המגזר הממשלתי בישראל מורכב ממשרדי הממשלה, המוסד לביטוח לאומי, הרשויות המקומיות, המוסדות הלאומיים וכן מוסדות ללא כוונת רווח (מלכ"רים) שהממשלה מממנת את עיקר הוצאותיהם. למגזר זה חשיבות רבה בתחומי הרגולציה הכלכלית וייצור השירותים לצריכה אינדיווידואלית (עבור הפרט) וקולקטיבית (עבור כלל האוכלוסייה).

המידע כולל נתונים כלכליים בנוגע להוצאות, להכנסות, לגירעון ולחוב של המגזר הממשלתי. כמו כן מוצגים נתונים על סיוע רשמי לפיתוח (ODA – Official Development Assistance), שישראל מספקת למדינות מתפתחות.

הנתונים מתקבלים ממשרד האוצר, ממשרד הביטחון, מהמוסד לביטוח לאומי, מרשויות מקומיות, מדוחות כספיים של מלכ"רים ציבוריים ושל מוסדות לאומיים ועוד.

נתונים נבחרים, 2022

עודף המגזר הממשלתי

7.9 מיליארד ש"ח
 0.45% מהתמ"ג
 (לעומת גירעון של 53.7 מיליארד ש"ח,
 3.4% מהתמ"ג, בשנת 2021)

החוב הממשלתי
 1,057.5 מיליארד ש"ח

יחס חוב-תוצר
 60.0% מהתמ"ג

חוב המגזר הממשלתי
 1,067.5 מיליארד ש"ח

סיוע רשמי לפיתוח (ODA)
 521.0 מיליון דולר
 (0.101% מההכנסה הלאומית הגולמית)



הוצאות המגזר הממשלתי

660.2 מיליארד ש"ח
 37.4% מהתמ"ג
 (לעומת 643.1 מיליארד ש"ח,
 40.7% מהתמ"ג, בשנת 2021)
 מהם:

368.5 מיליארד ש"ח
 לצריכה ציבורית



הכנסות המגזר הממשלתי

668.0 מיליארד ש"ח
 37.9% מהתמ"ג
 מהם:
 87.0%
 מגביית מיסים

28 PUBLIC ATTITUDES AND PERCEPTIONS

Data on public attitudes and perceptions provide information about the population's attitudes and positions regarding a variety of areas such as health, housing conditions and area of residence, employment, economic situation, emotional state, and volunteerism.

Data on public attitudes and perceptions are obtained from the Social Survey, which is carried out every year on a new sample of Israel's adult population (aged 20 and over). The Social Survey, which reports on the living conditions and welfare of the population, has two parts: a core, permanent questionnaire containing questions that are asked each year; and a varying module that examines new topics each year, which are investigated in detail.

The 2021 survey dealt in detail with the topics of: Transportation and road safety; language use; spending time with family members; spending time outdoors; and quality of life indicators.

Selected Data, 2021 (persons aged 20 and over)

<p>Satisfaction With Life and Economic Situation</p> <p>89.3% were satisfied with their lives</p> <p>66.8% were satisfied with their economic situation</p> <p>Satisfaction With One's Dwelling and Area of Residence</p> <p>86.8% were satisfied with the dwelling they lived in</p> <p>84.0% were satisfied overall with their area of residence</p> <p>60.9% were satisfied with the cleanliness in their area of residence</p> <p>40.9% were satisfied with the public transportation in their area of residence</p> <p>Perceived Poverty and Economic Difficulties</p> <p>12.0% felt poor during the past year:</p> <p>6.2% of Jews* 36.8% of Arabs</p> <p>25.9% had difficulty meeting the total monthly expenses of the household</p>	<p>Sense of Stress, Loneliness, and Discrimination</p> <p>18.4% always or frequently felt stressed</p> <p>21.0% frequently or occasionally felt lonely</p> <p>26.3% felt some type of discrimination during the past year</p> <p>Knowledge of Languages</p> <p>55.2% native language Hebrew</p> <p>19.7% native language Arabic</p> <p>12.6% native language Russian</p> <p>Avoid seeking government services due to their level of Hebrew</p> <p>2.9% of Jews* 11.0% of Arabs</p> <p>10.0% of Arabs have difficulty receiving medical services due to their level of Hebrew</p>	<p>Quality of Life Indicators</p> <p>average evaluation on a scale of (0-10)</p> <p>Satisfaction with life 8.0</p> <p>Satisfaction with the amount of time devoted to leisure activities</p> <p>6.3 among Jews* 4.8 among Arabs</p> <p>Satisfaction with personal relationships</p> <p>8.5 among Jews* 7.8 among Arabs</p> <p>Extent of trust in people</p> <p>6.5 among Jews* 4.5 among Arabs</p> <p>Sense of risk</p> <p>32.7% estimate that the main risk to them and their families relates to health</p> <p>Work-Life Balance</p> <p>34.4% (compared with 29.9% in 2020) were not satisfied with the balance between the time they devoted to work and the time they devoted to other areas of their lives</p>
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* Including "Others": Non-Arab Christians, members of other religions, and those not classified by religion in the Population Register.

28 עמדות ותחושות הציבור

נתונים על עמדות ותחושות הציבור מספקים מידע על תפיסות ועמדות של האוכלוסייה במגוון תחומים: בריאות, תנאי דיור ואזור המגורים, תעסוקה, מצב כלכלי, מצבים רגשיים, התנדבות ועוד.

הנתונים מתקבלים מהסקר החברתי, הנערך בכל שנה על מדגם חדש מן האוכלוסייה הבוגרת (בני 20 ומעלה). הסקר החברתי מדווח על תנאי החיים של האוכלוסייה ועל רווחתה, והוא מורכב משני חלקים עיקריים: גרעין קבוע של שאלות החוזרות בכל שנה, וחלק משתנה. העוסק בכל שנה בנושאים חדשים בהרחבה.

בשנת 2022 עסק הסקר בנושאים האלה: השלכות תעסוקתיות, חברתיות וכלכליות של משבר הקורונה; השפעת הדת על תחומי החיים במדינה; תפיסת הדמוקרטיה במדינת ישראל; ותפיסת אמצעי התקשורת - המסורתיים והחדשים.

נתונים נבחרים, 2022 (בני 20 ומעלה)

<p>הערכת הדמוקרטיה בישראל ומעורבות אזרחית</p> <p>40.2% מרוצים או מרוצים מאוד מהדרך שבה הדמוקרטיה פועלת בישראל</p> <p>29.5% מהיהודים 41.9% מהערבים</p> <p>השפעת הדת</p> <p>73.3% מסכימים עם האמירה "שילדת יש השפעה חזקה על החיים בארץ"</p> <p>52.2% מהיהודים 76.8% מהערבים</p> <p>עמדות בנושא אמצעי התקשורת והרשתות החברתיות</p> <p>47.4% עבור הטלוויזיה היא מקור עיקרי למידע חדשותי</p> <p>42.0% צורכים חדשות בעיקר מאתרי חדשות באינטרנט</p> <p>אמצעי תקשורת הנתפסים כאמינים בקרב הציבור</p> <p>43.8% בקרב הרדיו - 47.6% עיתונים - 43.6% הרשתות החברתיות - 28.3% בקרב</p>	<p>תחושות לחץ, בדידות ואפליה</p> <p>19.0% מרגישים לחוצים תמיד או לעיתים קרובות</p> <p>20.9% מרגישים בדידות לעיתים קרובות או מדי פעם</p> <p>21.4% חשו אפליה כלשהי בשנה האחרונה</p> <p>צמצום פערים בחברה</p> <p>בעיני הציבור הפעולה העיקרית שהמדינה צריכה לעשות כדי לצמצם את הפערים בחברה היא להשקיע בחינוך (41.6%)</p> <p>תחושת סיכון</p> <p>32.5% סבורים שהסיכון העיקרי להם ולמשפחתם קשור בבריאות:</p> <p>7.3% חוששים מנחלה או ממגבלות ממונשך בבן משפחה מבוגר</p> <p>25.2% חוששים מנחלה או ממגבלות ממונשך בבן משפחה מבוגר</p>	<p>שביעות רצון מהחיים ומהמצב הכלכלי</p> <p>90.2% מרוצים מחייהם 63.0% מרוצים ממצבם הכלכלי</p> <p>שביעות רצון מהדירה ומאזור המגורים</p> <p>88.0% מרוצים מהדירה שבה הם מתגוררים</p> <p>84.2% מרוצים באופן כללי מאזור המגורים</p> <p>59.5% מרוצים מהניקיון באזור המגורים</p> <p>35.0% מרוצים מהתחבורה הציבורית באזור המגורים</p> <p>תחושת עוני וקשיים כלכליים</p> <p>12.7% הרגישו עניים בשנה האחרונה</p> <p>42.8% מרוצים מהערבים 7.6% מהיהודים</p> <p>29.9% מתקשים לכסות את כל ההוצאות החודשיות של משק הבית</p>
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איזון עבודה-חיים 33.3% אינם מרוצים מהאיזון בין הזמן שהם מקדישים לעבודה ובין הזמן שהם מקדישים לתחומים אחרים בחייהם. האחוז דומה בקרב גברים ונשים

Israel Trends 2024-2026



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar

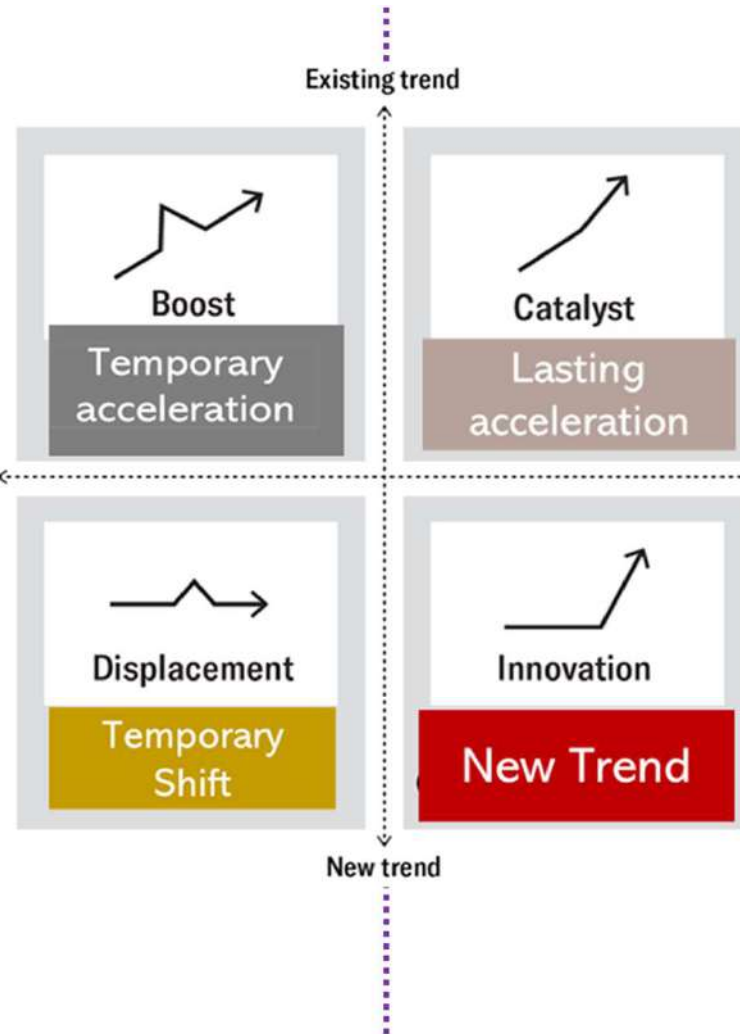


GenAI Analyst

STKI Research Team

- Hybrid Workspace & Workers
- Crisis Management Services & Tools
 - Regularly modified & tested BCP
- Data Literacy Strategies & Self-service Analytics
- Outsourcing
 - Staff Augmentation (especially offshore)
 - Managed Services
- Full stack development:
- Microservices & Container Development
- Internal Development Platform (IDP)
- Progressive Web Applications (PWA)
- Low code (citizen developers)
- APIs & Composable Software (center office)
- DecSecOps
- Site Reliability Engineering (SRE)
- FinOps (software & managed services)
- IoT (Connected Sensors & Edge Infrastructure)
 - Home, & Business Sensors
 - Vehicle Sensors
 - Health Sensors

- Procurement: Cloud/SaaS/Software/Hardware
 - Moving perpetual to subscriptions licenses
 - CAPEX to OPEX in IT Budgets
- Uniting NOC & SOC centers
- Four (4) Israeli-Based Hyper-scalers
 - Local XaaS marketplaces
- Four (4) undersea cables (1/Q 2024)
- Smartphone capabilities
 - Allways-on camera
 - Seamless voice control:
 - Wi-Fi 6 & 5G connectivity (10Gbps)
- Technical Debt *should be paid*:
 - Old on-prem ERP to cloud
 - Lift & shift
 - New SaaS core apps
 - Closing of on-prem Data Centers
 - Co-location services
 - Backup as a Service
 - IaaS & PaaS services



- Digital in Scale Value Strategies
 - Hyper-Personalization & concierge services
 - Employee Empowerment & Customer Engagement
- Product-led Enterprise Organizations
- New Team Topologies
 - Stream-aligned Teams
 - Enabling Teams
 - Data Teams
 - Platform Teams
- Hybrid-cloud Core Technology Stack
- SaaS Enterprise Solutions as first choice
- Cloud First Development
- Open Industry (banks, insurance, health) Integration (APIs)
- Communication & Knowledge Software
- Cyber Tools
 - Zero-trust ,SASE,, Automated Incident Investigation
 - Digital Identity Enhanced Privacy
 - Password Less Authentication,
 - Ransomware Readiness, Multi Cloud Visibility
- Data Science & Intelligent Predictive Analytics
 - Data Governance
- AI (GenAI ,Narrow AI)
 - AI Literacy Strategies
 - ML (Supervised, Unsupervised, Self-supervised)
 - DL models (Interpretability Risks, Compliance)
- Intelligent Automation
 - Augmented Intelligence
 - Business Process Optimization (theory of constraints)
 - AI-enabled Enterprise Applications
 - RPA, BPM tools
 - Robotics
- Ecosystem Business Model
 - Industry-specific Clouds
 - Platforms & marketplaces
 - Super Apps
- Quantum Computing
- Blockchain
 - Cryptocurrencies
 - Web 3.0
- AR/XR (augmented reality & extreme reality) & Metaverse



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2024-2026 era of transformations

- Digital Transformation
- Data Transformation
- AI Transformation
- Cloud (infrastructure services) Transformation
- Cloud (software) Transformation
- E(verything)as a Service Transformation
- Intelligent Automation Transformation
- Human Transformation
- Others Transformation

There are **three trends nobody talks** about (people trying to ignore them) but **they influence everything**



“Would it be so bad if the CEO, CFO & CIO could see you?”

There are three invisible trends :

1. **Technical Debt** - outdated “everything ”and inability to integrate applications and/or processes.
2. **CapEx to OpEx** - a shift from capital expenditures to operational expenditures, which has significant implications for budgeting decisions.
3. **Trust** - the idea that a single vendor cannot do the whole project.



Invisible trend 1

“Technical Debt”

- Age of most senior manpower employees (that hold important application software knowledge) is over 65
- Outdated infrastructure (software/ hardware)
- Outdated software (several versions behind latest vendor version)
 - ERP and/or CRM
- Outdated data management tools (ETL, DW, BI)
- Core systems based on outdated technologies (not in itself broken systems) but are critical to day-to-day operations
- Inability to integrate applications or processes (in-house or partners)
- Missing documentation
- Un-commented configuration
- Un-documented code changes



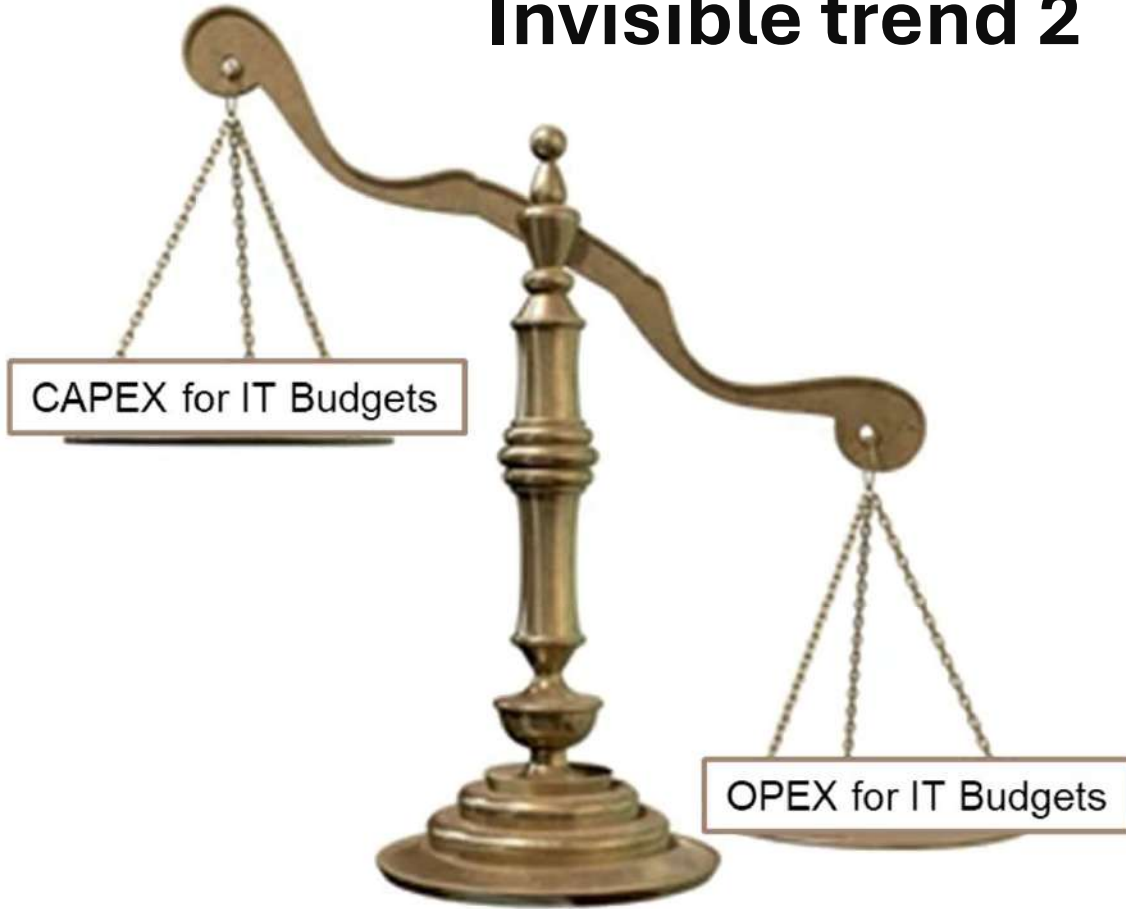
How much does unplanned IT downtime really cost?



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Invisible trend 2





CapEx to OpEx

Israel's Enterprises are behind most of the rest of the world in moving most IT expenses from CAPEX to OPEX, although there has been a move (last 4 years) from OPEX of 40%-50% to (in some cases) 80%-85%

Israel's High-Tech and Startups are cloud native and by definition have OPEX IT budgets

- CAPEX is capitalized and depreciated or amortized over the life of the asset, whereas OPEX is expensed in the accounting period it's incurred.
- CAPEX can improve the company's future earning capacity, while OPEX is necessary for the daily functioning of the business.
- **Both OPEX and CAPEX are crucial for a business's operation and growth, but they serve different purposes and are treated differently for accounting and tax purposes**
- CAPEX appears on the balance sheet (מאזן)
- OPEX appears on the income statement (דוח רווח והפסד)



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Instead of large, one-time capital expenditures (CAPEX) for software licenses and physical servers, enterprises will be incurring ongoing operational expenditures (OPEX) for subscription fees and cloud services.

This shift has several implications:

Budgeting and Cash Flow: OPEX costs are typically predictable and spread evenly over time, which can aid in budgeting and cash flow management. When getting software as a subscription, the opportunity to stop paying maintenance doesn't exist, payments must continue if the data it produced is needed. **No vendor tolerance. The total cost of ownership (TCO) is higher over the long term compared to perpetual license models.**

Flexibility: With subscription models and cloud services, companies can easily scale up or down as their needs change. They can also experiment with different tools without a significant upfront investment. **NOT REALLY**

Updates and Maintenance: SaaS and cloud providers typically handle updates and maintenance, **reducing the burden on a company's IT department.**

Security and Compliance: **Cloud services and SaaS platforms often have robust security measures in place, and ensure that these services comply with all relevant regulations and standards (companies also have to also install their own cloud security products).**

In response to these trends, companies may need to adjust their financial planning, IT strategy, and vendor management practices. They may also need to train their employees on new tools and update their security and compliance protocols..



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the shift from capital expenditures (CAPEX) to operational expenditures (OPEX) significant implications for budgeting decisions :

Financial Metrics

- **Profit Margins:** An increase in OPEX could lead to a decrease in operating profit margins in the short term because these costs are expensed when incurred, whereas CAPEX is spread out over several years through depreciation.
- **Earnings Before Interest, Taxes, Depreciation, and Amortization (EBITDA):** This popular financial metric may decrease in the short term due to the increase in operating expenses.
- **Return on Assets (ROA) and Return on Investment (ROI):** These metrics could improve because shifting to an OPEX model often means fewer assets on the balance sheet.
- **Cash Flow:** Shifting to an OPEX model can lead to smoother and more predictable cash flows, since costs are spread out evenly over time. However, total cash outflows may increase over the long term.

Tax Liabilities

- **Immediate Expense Deduction:** OPEX can be fully deducted in the year they're incurred, potentially reducing taxable income and thus tax liabilities in the short term.
- **Depreciation Deductions:** With fewer CAPEX, there will be fewer assets to depreciate, which could increase tax liabilities over the long term.

Stock Performance

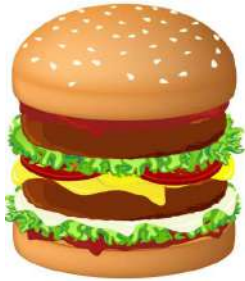
- **Profitability and Earnings Per Share (EPS):** If the shift to OPEX leads to a decrease in profitability or EPS, this could negatively impact stock price in the short term.
- **Long-Term Growth Prospects:** Investors may view the shift to OPEX positively if it signals a move towards more flexible, scalable, and efficient operations, which could enhance long-term growth prospects and thus stock price.
- **Market Comparability:** If a company's shift from CAPEX to OPEX is more or less pronounced than its peers, this could impact its comparability and thus how investors value its stock.





Invisible trend 3

TRUST: “ why a single” vendor cannot should do the whole project ?



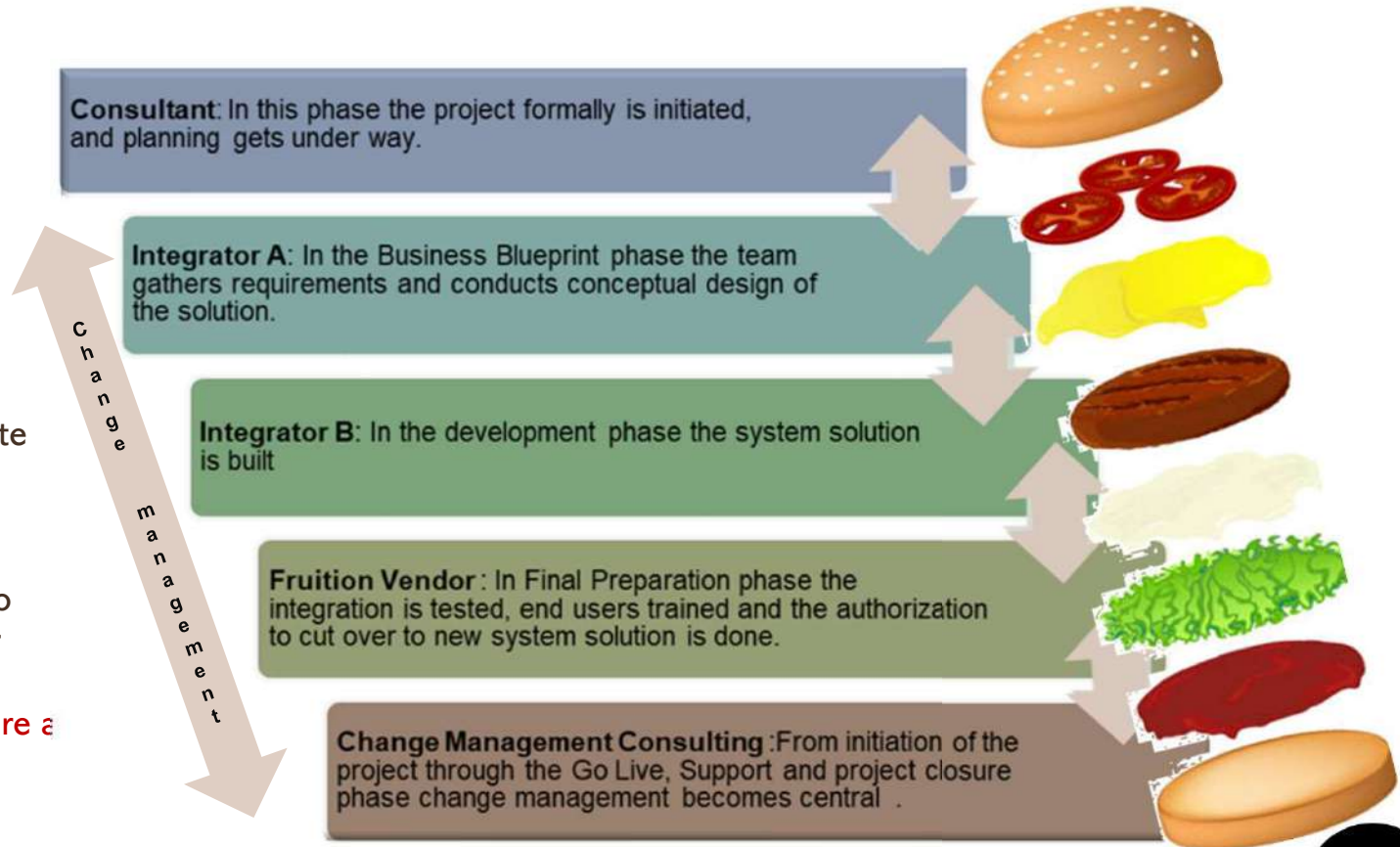
Today, **time, money and knowledge is lost** because different vendors do separate parts.



We “should” have learned to “either” **trust the vendor** for consulting, implementation, testing and fruition **or we hire a different vendor**



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Trends and recordings presented on the
webinar of 30/6/2024

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Israel number of companies & IT budgets by Industry



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst

STKI Research Team



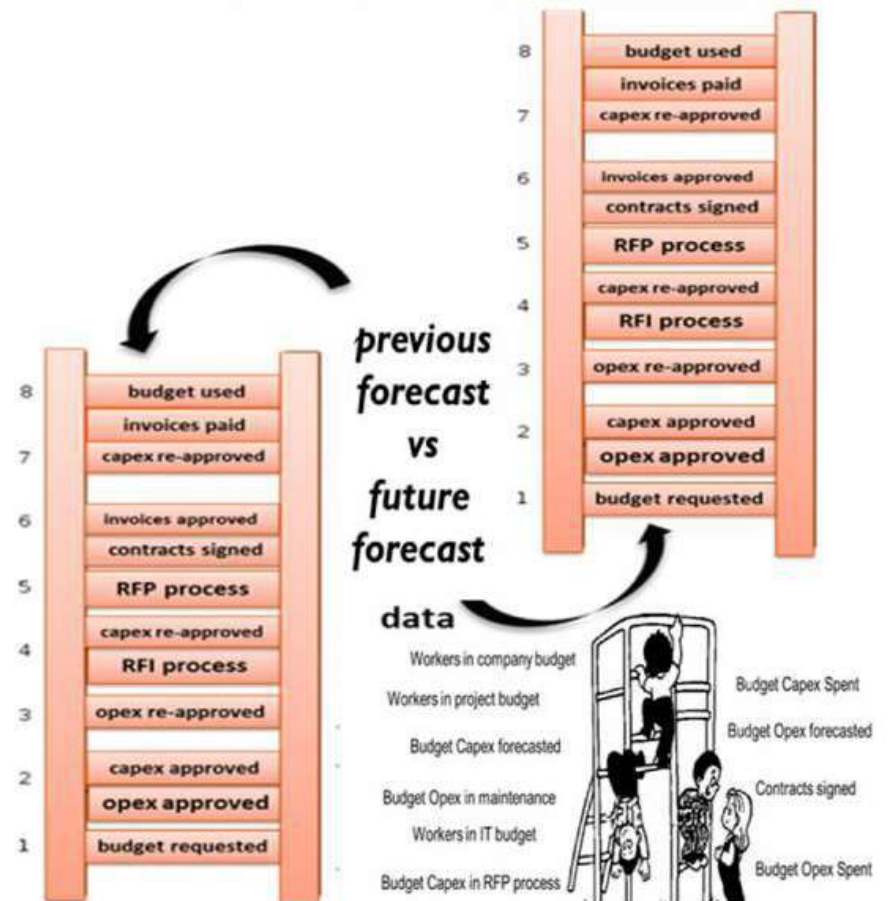


STKI's analysts interviewed over 100 CIOs & VP Techs in Israel (managing around 70-75% of IT budgets) about:

1. Approved Budgets for 2024 ✨
2. Amount used in Budgets 2022-2023
3. Projects forecasted for 2024-2026
4. IT Department re-organizations
5. Vendors to recommend or not

✨ IT "internal" budgets differ from enterprise to enterprise because:

- OPEX & CAPEX
- manpower
- rent & electricity
- regulation projects
- LOB "digital"
- etc.





Number of Companies in Israel 2023

number of employees	2016	2017	2018	2019	2020	2021	2022	2023				
	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)	number of companies (paying taxes)	number of employees v2	number of companies (paying taxes)	% of TOTAL	subtotals	
251+	1,622	1,796	1,711	1,696	1,498	1,712	1,802	251+	1,786	0.58%	1.46%	
101-250	2,752	2,817	2,708	2,738	2,173	2,663	2,757	101-250	2,688	0.88%		
0	17,995	18,470	4,725	4,849	3,554	4,701	4,955	51-100	4,679	1.55%	1.55%	1.55%
	52,265	52,970	38,857	38,760	30,938	38,532	40,270	10-50	39,689	13.13%	13.13%	98.10%
5	192,641	197,928	231,609	235,210	234,128	240,910	252,571	2 to 9	256,932	84.98%	84.98%	
totals	267,275	273,981	279,610	283,253	272,291	288,518	302,355	305,774			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	ACCORDING TO BITUACH LEUMI 5/2023	ACCORDING TO BITUACH LEUMI 5/2024			 המוסד לביטוח לאומי	



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Number of Companies 2023 (by Industry) page 1

Industry	עסקים פעילים, לפי ענף כלכלי (1)									total	self employed & companies without employees	total active business
	number of employees per company											
	100+	75-100	50-74	40-49	30-39	20-29	10-19	5-9	1-4(2)			
number of companies	4,415	1,650	3,360	2,629	4,204	8,610	25,046	47,135	216,557	313,606	370,550	684,156
Information and communications	416	165	292	188	302	560	1,259	1,776	8,094	13,052	14,045	27,097
Telecommunications, computer programming and consultancy and related activities, information service activities	391	160	278	172	286	519	1,158	1,590	7,070	11,624	11,175	22,799
Financial and insurance activities	78	30	49	35	57	157	515	1,365	7,572	9,858	8,481	18,339
Real estate activities	19	8	28	12	34	86	323	882	9,035	10,427	33,534	43,961
Professional, scientific and technical activities	220	120	250	216	321	883	2,972	6,394	41,511	52,887	85,152	138,039
Administrative and support service activities	409	105	235	149	196	430	1,055	1,801	8,027	12,407	13,015	25,422
Local, public and defence administration and social security	282	28	45	14	30	87	85	121	318	1,010	13	1,023
Education	433	158	271	205	315	511	1,170	1,702	5,721	10,486	14,350	24,836
Human health and social work activities	421	103	179	114	175	321	1,017	2,255	14,170	18,755	37,448	56,203
Human health activities	111	24	50	34	62	150	554	1,494	10,545	13,024	33,728	46,752
Residential care and social work activities	310	79	129	80	113	171	463	761	3,625	5,731	3,720	9,451
Arts, entertainment and recreation	79	44	90	71	114	241	685	1,039	5,113	7,476	18,415	25,891
Other service activities; extraterritorial organizations and bodies	229	74	138	88	165	322	747	1,381	9,598	12,742	17,240	29,982



Number of Companies 2023 (by Industry) page 2

הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية



עסקים פעילים, לפי ענף כלכלי (2)

Industry	number of employees per company									total	self employed & companies without employees	total active business
	100+	75-100	50-74	40-49	30-39	20-29	10-19	5-9	1-4(2)			
number of companies	4,415	1,650	3,360	2,629	4,204	8,610	25,046	47,135	216,557	313,606	370,550	684,156
Agriculture, forestry and fishing	87	57	136	114	174	337	1,020	1,472	4,262	7,659	7,634	15,293
Manufacturing; mining and quarrying	646	220	385	255	412	704	1,793	2,601	7,815	14,831	7,898	22,729
Electricity and water supply, sewerage and waste management	24	10	27	22	32	56	118	145	483	917	1,029	1,946
Construction	164	64	161	186	306	768	3,144	8,010	32,984	45,787	33,324	79,111
Wholesale and retail trade and repair of motor vehicles	473	225	504	435	761	1,623	5,379	10,822	41,073	61,295	39,380	100,675
Wholesale and retail trade and repair of motor vehicles	38	29	46	53	78	213	648	1,480	5,537	8,122	4,831	12,953
Wholesale trade, except motor vehicles	191	105	229	174	311	702	1,936	3,494	11,490	18,632	9,172	27,804
Retail trade, except motor vehicles	244	91	229	208	372	708	2,795	5,848	24,046	34,541	25,377	59,918
Transportation, storage, postal and courier activities	153	53	126	98	155	337	1,047	2,126	11,179	15,274	30,360	45,634
Postal and courier activities	13	6	9	5	7	23	72	142	990	1,267	2,571	3,838
Accommodation and food service activities	282	186	444	427	655	1,187	2,717	3,243	9,602	18,743	9,232	27,975



The trend towards software as a service (SaaS) and cloud-based infrastructure is indeed **shifting the way companies manage and account for their technology spending (CAPEX to OPEX)**

	number of employees	number of companies
This companies have IT departments that will introduce hybrid cloud solutions	251+	1,786
This companies (usually will have older ERP, CRM, Core systems) will migrate to cloud first solutions	101 - 250	2,688
SMB companies will move to "SaaS" cloud solutions	51 - 100	4,679
	10 - 50	39,689
	2 to 9	256,932

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

FORECASTED

industry	Budgets 2018	change from 2018	Budgets 2019	change from 2019	Budgets 2020	change from 2020	Budgets 2021	change from 2021	Budgets 2022	change from 2022	Budgets 2023	change from 2023	Budgets 2024	change from 2024	Budgets 2025
government	\$1,630	5.95%	\$1,727	-16.04%	\$1,450	4.14%	\$1,510	15.89%	\$1,750	2.86%	\$1,800	8.33%	\$1,950	10.26%	\$2,150
security	\$525	2.29%	\$537	2.42%	\$550	5.45%	\$580	17.24%	\$680	10.29%	\$750	20.00%	\$900	9.44%	\$985
education	\$292	4.45%	\$305	14.75%	\$350	17.14%	\$410	14.63%	\$470	-4.26%	\$450	2.22%	\$460	10.87%	\$510
health	\$350	-2.86%	\$340	14.71%	\$390	15.38%	\$450	6.67%	\$480	-4.17%	\$460	-1.09%	\$455	14.29%	\$520
utilities	\$215	-2.33%	\$210	11.90%	\$235	6.38%	\$250	4.00%	\$260	-19.23%	\$210	-4.76%	\$200	5.00%	\$210
transport	\$340	7.35%	\$365	10.96%	\$405	11.11%	\$450	22.22%	\$550	-3.64%	\$530	-3.77%	\$510	1.96%	\$520
banks	\$920	10.87%	\$1,020	-6.86%	\$950	-3.16%	\$920	6.52%	\$980	-7.14%	\$910	-3.30%	\$880	3.98%	\$915
insurance	\$405	3.70%	\$420	3.57%	\$435	3.45%	\$450	7.78%	\$485	-7.22%	\$450	-3.33%	\$435	9.20%	\$475
fin other	\$310	29.03%	\$400	12.50%	\$450	13.33%	\$510	13.73%	\$580	-3.45%	\$560	-5.36%	\$530	9.43%	\$580
manuf	\$875	-1.71%	\$860	-2.33%	\$840	7.14%	\$900	-2.22%	\$880	-7.39%	\$815	-2.45%	\$795	3.77%	\$825
retail	\$238	-3.36%	\$230	8.70%	\$250	18.00%	\$295	3.39%	\$305	-1.64%	\$300	6.67%	\$320	7.81%	\$345
high tech	\$842	7.01%	\$901	38.73%	\$1,250	32.00%	\$1,650	9.09%	\$1,800	-8.33%	\$1,650	-6.06%	\$1,550	8.39%	\$1,680
IT local vendors	\$165	9.09%	\$180	-2.78%	\$175	2.86%	\$180	1.11%	\$182	-5.49%	\$172	-6.98%	\$160	-1.25%	\$158
telecomm	\$230	13.04%	\$260	-5.77%	\$245	-6.12%	\$230	-6.52%	\$215	-6.98%	\$200	-7.50%	\$185	18.92%	\$220
media	\$180	11.11%	\$200	15.00%	\$230	8.70%	\$250	4.00%	\$260	-9.62%	\$235	-8.51%	\$215	16.28%	\$250
SMB/SME	\$410	-6.10%	\$385	-11.69%	\$340	17.65%	\$400	20.00%	\$480	-6.25%	\$450	-4.44%	\$430	11.63%	\$480
in M USD	\$7,927	5.21%	\$8,340	2.46%	\$8,545	10.42%	\$9,435	9.77%	\$10,357	-4.01%	\$9,942	0.33%	\$9,975	8.50%	\$10,823

all amounts in M \$ USD

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Internal Budgets variance can only be explained by economic changes (corona, war, etc.) explained in previous chapters

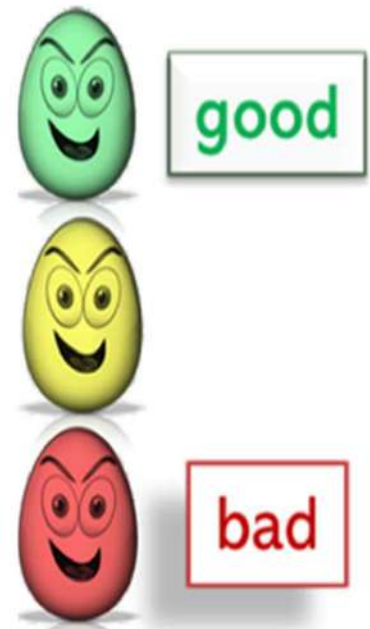
	2018	change from 2018	2019	change from 2019	2020	change from 2020	2021	change from 2021	2022	change from 2022	2023	change from 2023	2024	change from 2024	2025
industry budgets	\$7,927	5.21%	\$8,340	2.46%	\$8,545	10.42%	\$9,435	9.77%	\$10,357	-4.01%	\$9,942	0.33%	\$9,975	8.50%	\$10,823
IT market totals	\$6,903	9.88%	\$7,585	3.63%	\$7,860	10.62%	\$8,695	6.90%	\$9,295	-3.16%	\$9,001	3.02%	\$9,273	8.20%	\$10,033
internal budgets	\$1,024	-26.27%	\$755	-9.27%	\$685	8.03%	\$740	43.51%	\$1,062	-11.39%	\$941	-25.40%	\$702	12.54%	\$790



analysis of budgets 2024 & 2025

industry	Budgets 2024	% total	Market size	% total	industry	industry	Budgets 2025	% total	Market size	% total	industry
government	\$1,950	20%	\$3,765	37.74%	public	government	\$2,150	20%	\$4,165	41.31%	public
security	\$900	9%				security	\$985	9%			
education	\$460	5%				education	\$510	5%			
health	\$455	5%				health	\$520	5%			
utilities	\$200	2%	\$710	7.12%	utilities/ transport	utilities	\$210	2%	\$730	6.74%	utilities/ transport
transport	\$510	5%				transport	\$520	5%			
banks	\$880	9%	\$1,845	18.50%	financial	banks	\$915	8%	\$1,970	18.20%	financial
insurance	\$435	4%				insurance	\$475	4%			
fin other	\$530	5%				fin other	\$580	5%			
manuf	\$795	8%	\$1,115	11.18%	manuf/ retail	manuf	\$825	8%	\$1,170	10.81%	manuf/ retail
retail	\$320	3%				retail	\$345	3%			
high tech	\$1,550	16%	\$1,710	17.14%	high tech/ IT	high tech	\$1,680	16%	\$1,838	16.98%	high tech/ IT
IT local vendors	\$160	2%				IT local vendors	\$158	1%			
telecomm	\$185	2%	\$400	4.01%	telecomm / media	telecomm	\$220	2%	\$470	4.34%	telecom m/ media
media	\$215	2%				media	\$250	2%			
SMB/SME	\$430	4%	\$430	4.31%	SMB	SMB/SME	\$480	4%	\$480	4.43%	SMB
in M USD	\$9,975	100%	\$9,975	100%	in M USD	in M USD	\$10,823	100%	\$10,823	103%	in M USD

stki.info STKI IT Market Health Index
 over 1 excellent, .99-.85 very good
 .7 to .84 good
 under .70 bad and under .50 a recession
 (banks + insurance + fin other) IT budgets
 divided by
 (government + education + health) IT budgets



Market Health Index



	2018	2019	2020	2021	2022	2023	2024	2025
Market Health Index	0.58	0.63	0.67	0.64	0.61	0.55	0.49	0.47

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OPPORTUNITIES according to IT Budgets

government	\$1,950
high tech	\$1,550
security	\$900
banks	\$880
manuf	\$795
fin other	\$530
transport	\$510
education	\$460
health	\$455
insurance	\$435
SMB/SME	\$430
retail	\$320
media	\$215
utilities	\$200
telecomm	\$185
IT local vendors	\$160

2024



all amounts in M \$ USD

government	\$2,150
high tech	\$1,680
security	\$985
banks	\$915
manuf	\$825
fin other	\$580
health	\$520
transport	\$520
education	\$510
SMB/SME	\$480
insurance	\$475
retail	\$345
media	\$250
telecomm	\$220
utilities	\$210
IT local vendors	\$158

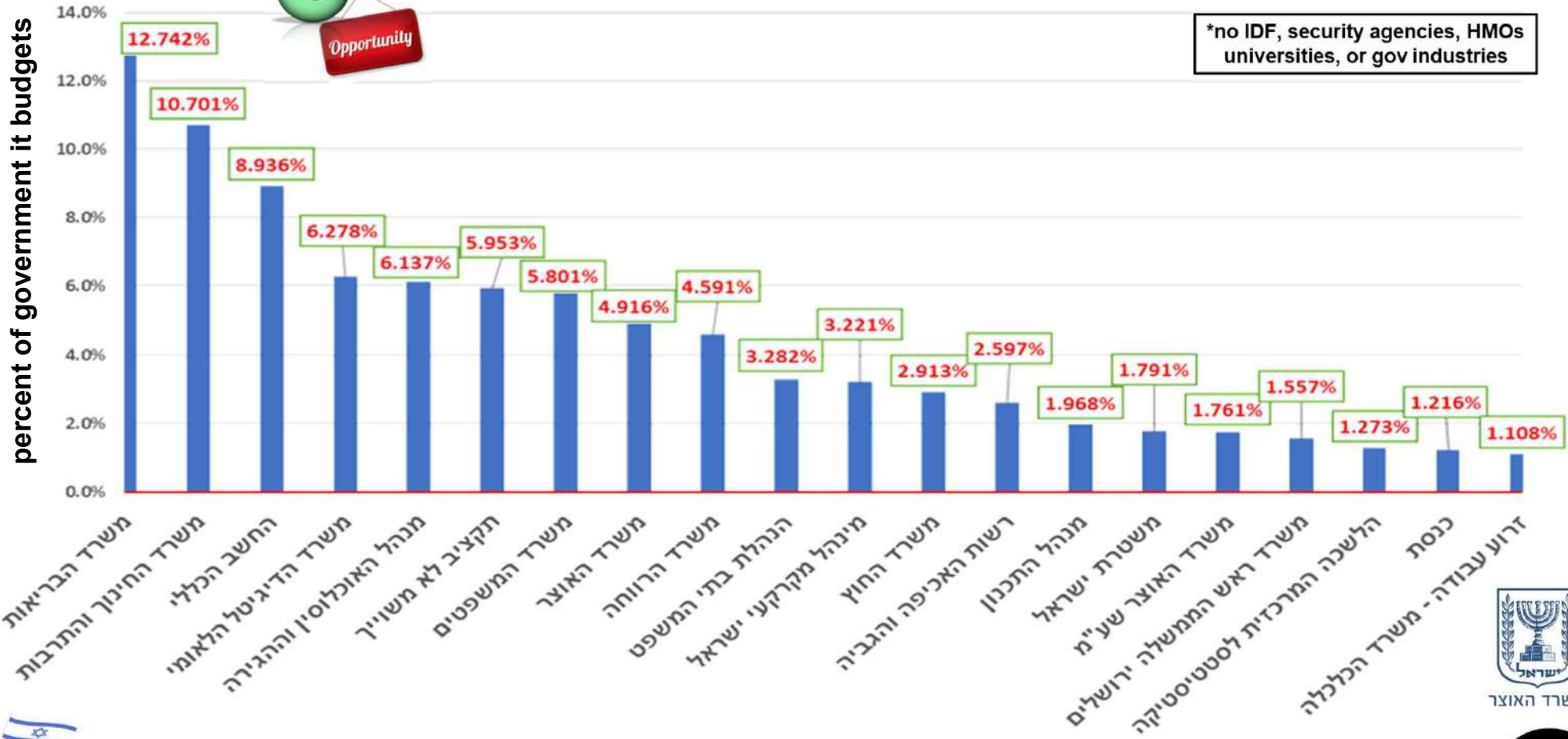
2025





Opportunity

Expected Slice of Government IT Budgets 2024*



*no IDF, security agencies, HMOs universities, or gov industries



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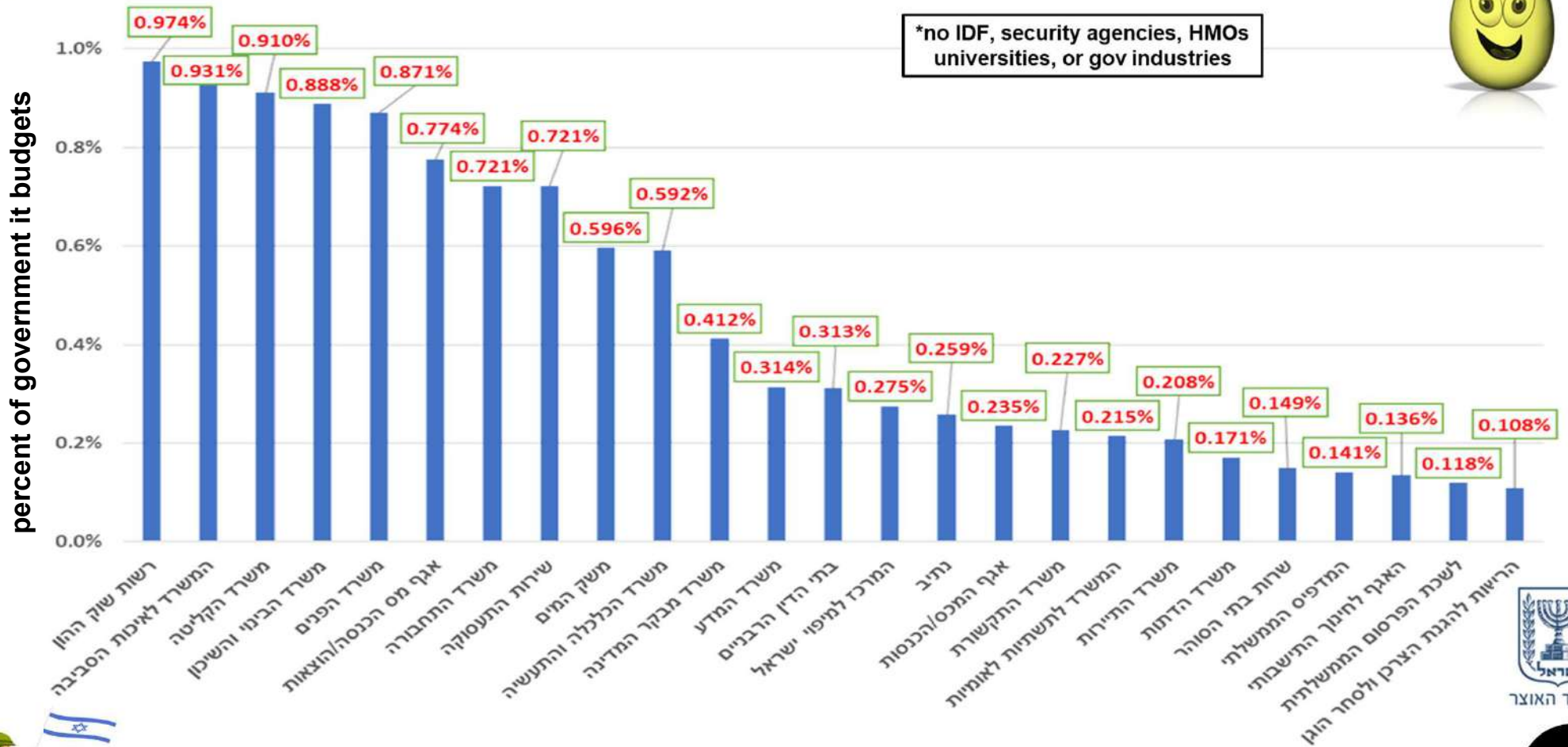


משרד האוצר

Expected Slice (2) of Government IT Budgets 2024*



*no IDF, security agencies, HMOs universities, or gov industries



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משרד האוצר



Israel IT Market Forecasts (statistics)



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen

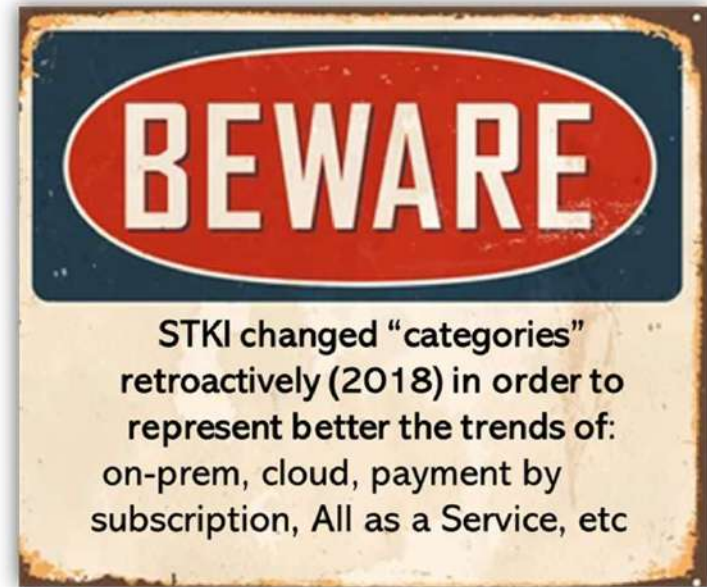


Reut Shefer Bar



GenAI Analyst

STKI Research Team



IT Market 2018-2026

	2018	2019	2020	2021	2022	2023	2024	2025	2026
TOTALS IT MARKET	\$6,902.65	\$7,585.20	\$7,859.50	\$8,695.30	\$9,294.80	\$9,000.50	\$9,272.00	\$10,031.50	\$10,987.00
% change IT Market		8.66%	8.86%	10.51%	6.90%	-3.26%	2.95%	8.17%	9.52%

FORECAST

Values in Million USD

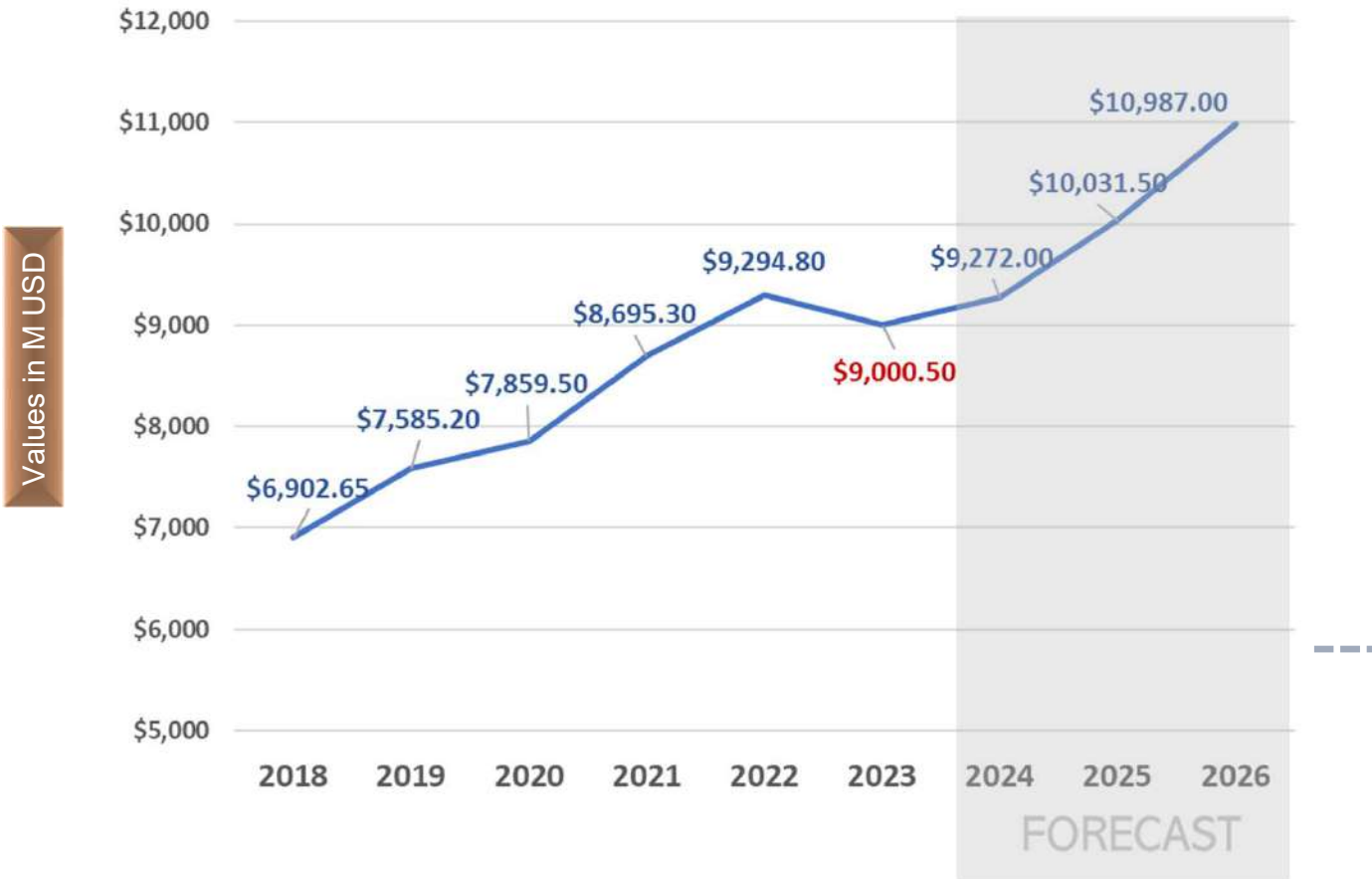


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IT Market 2018-2026

TOTALS IT MARKET

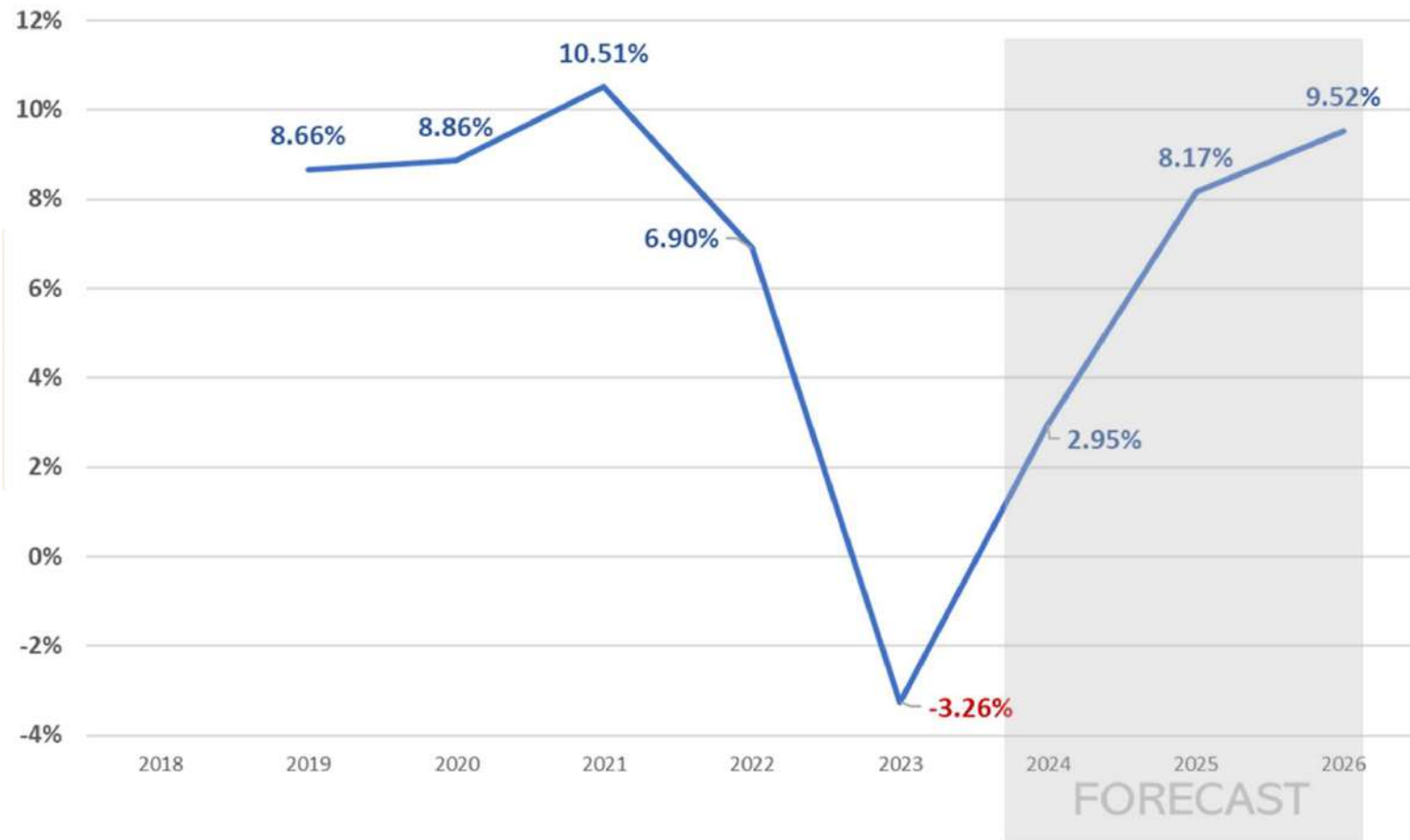


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IT Market 2018-2026

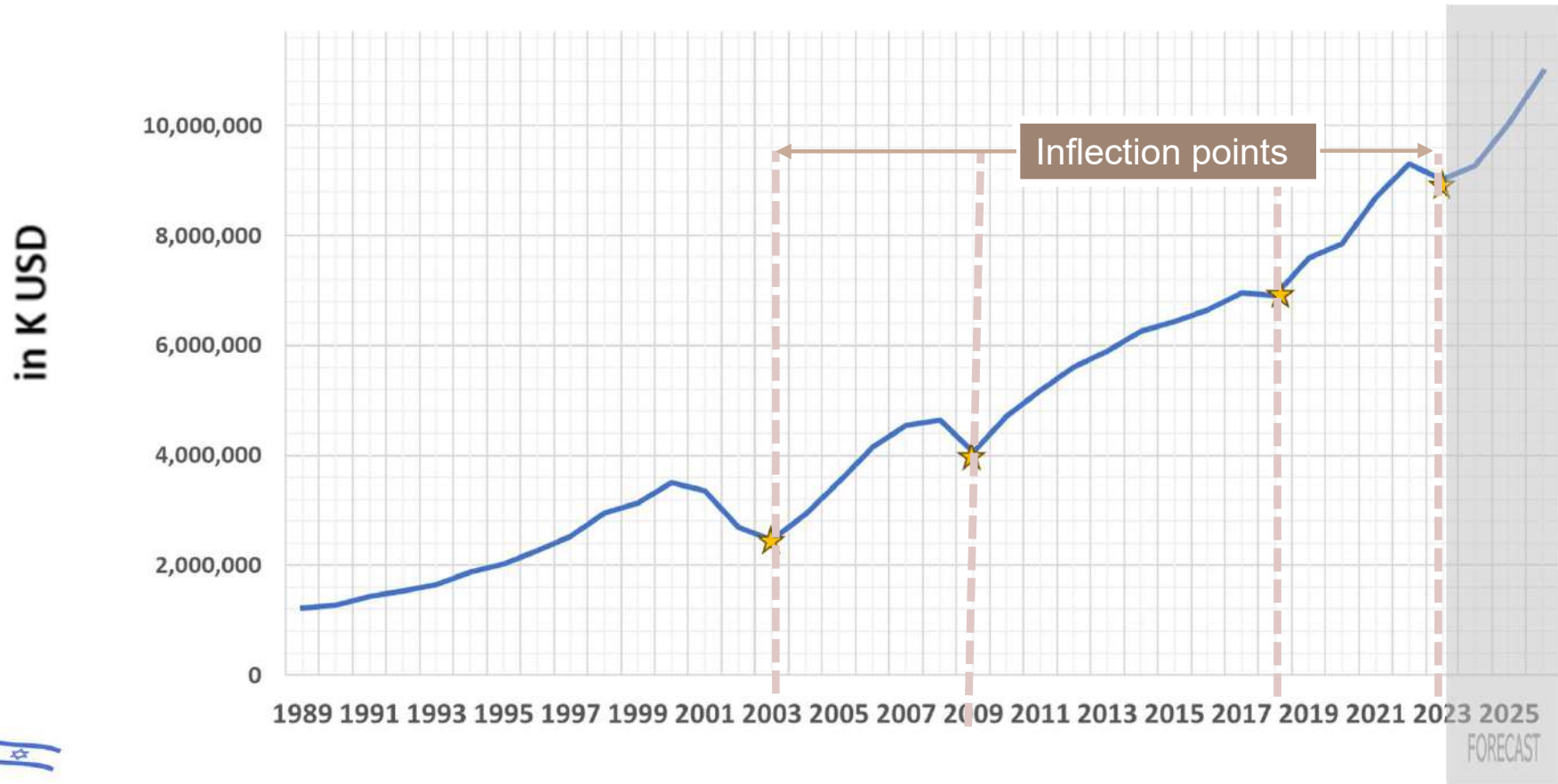
% change IT Market



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Israeli IT Market 1989-2026

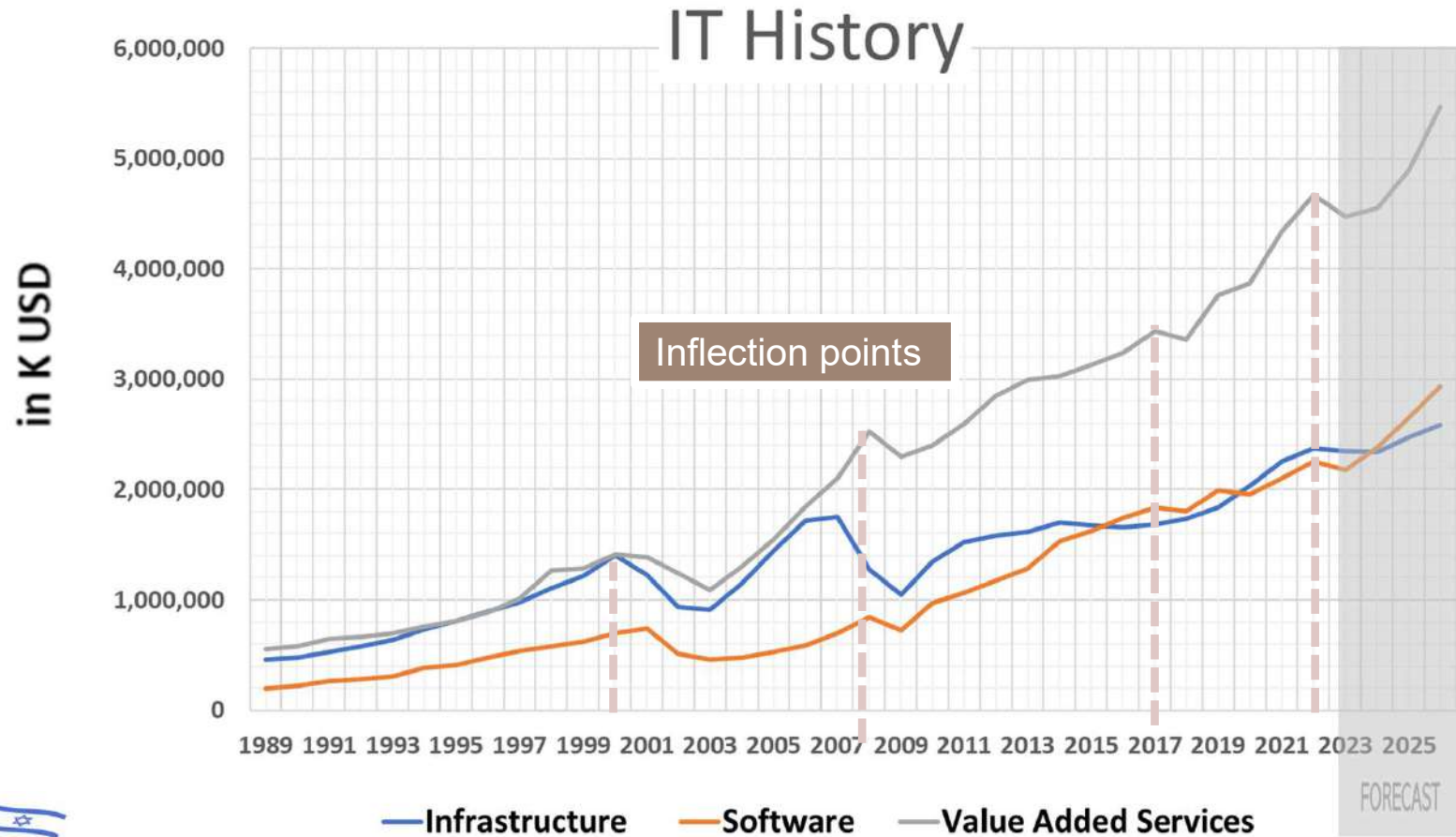


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IT Market 1989-2026

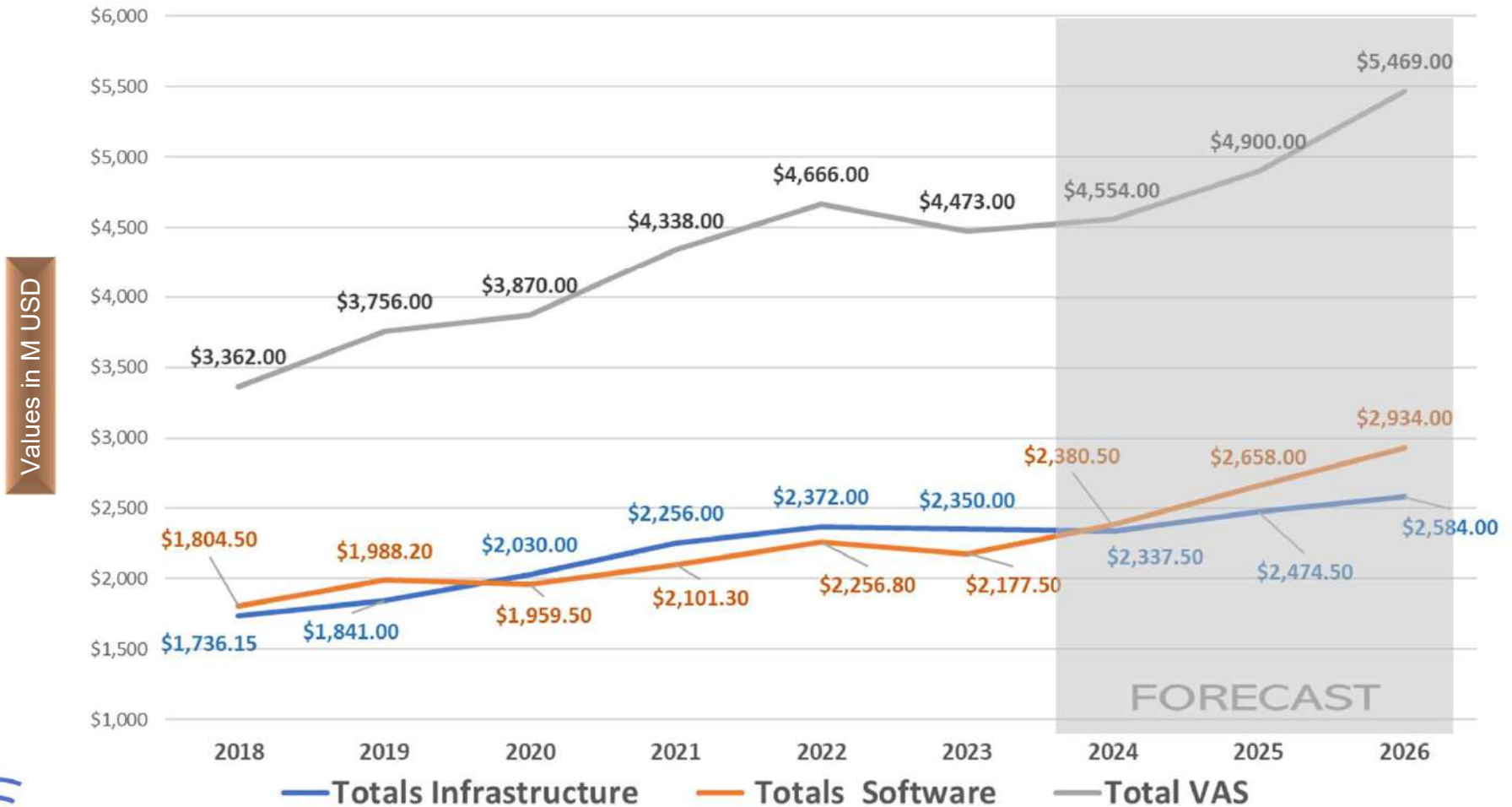


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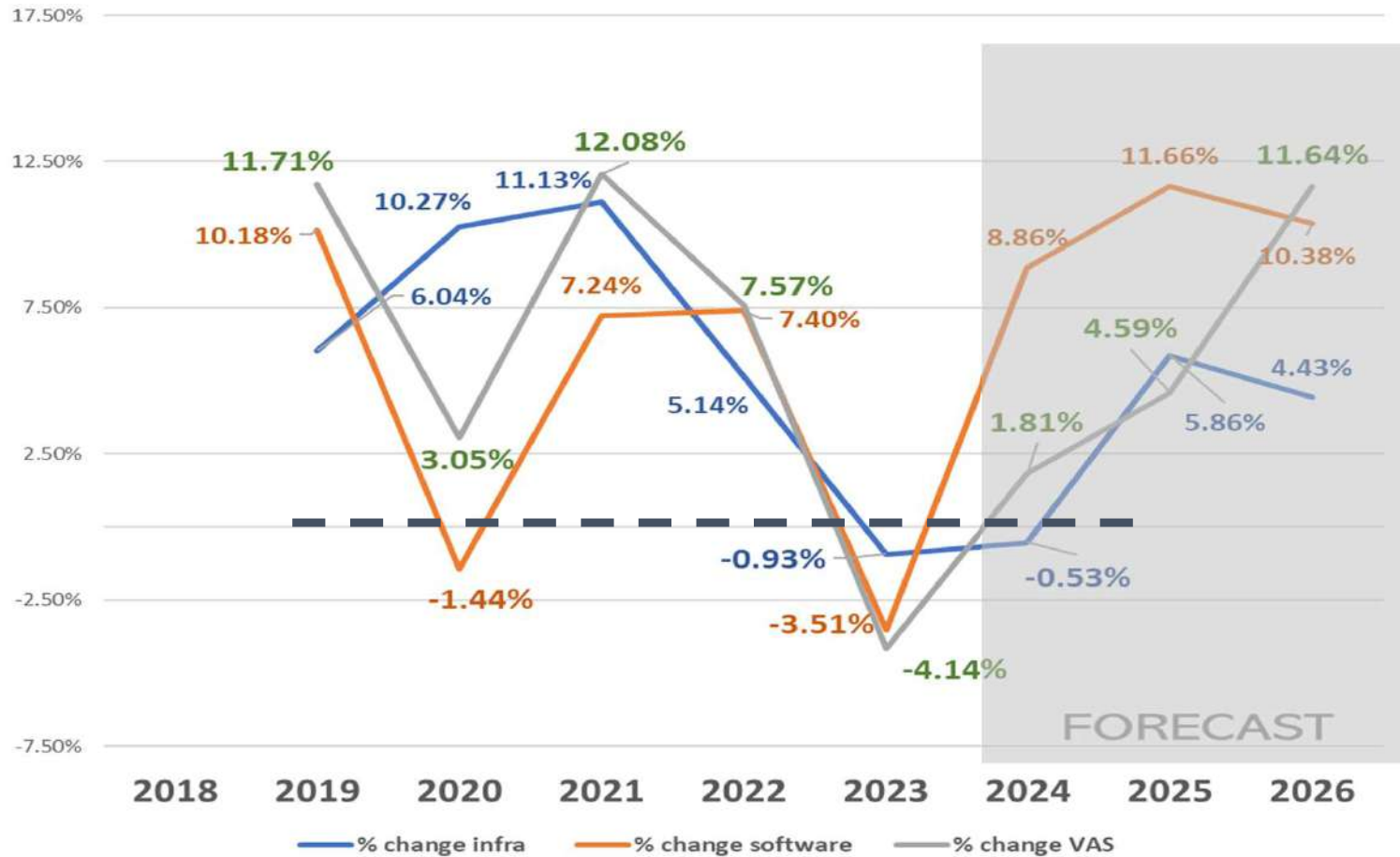
Israeli IT Market 2018-2024



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Israeli IT Market (% change) 2018-2026



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Israel

Infrastructure Product Markets 2024

"vendor rankings"



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar

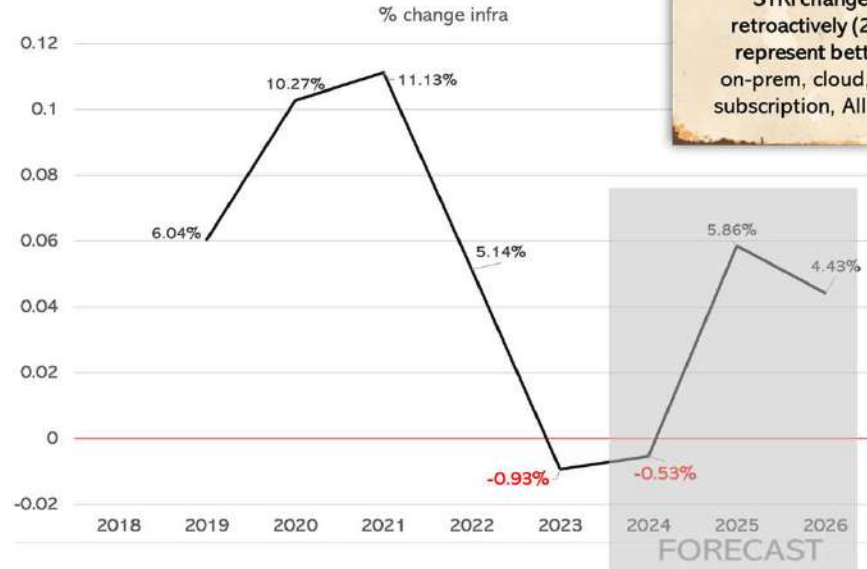


GenAI Analyst

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

STKI Research Team

Infrastructure Market 2018-2026



2018	2019	2020	2021	2022	2023	2024	2025	2026
\$1,736.15	\$1,841.00	\$2,030.00	\$2,256.00	\$2,372.00	\$2,350.00	\$2,337.50	\$2,474.50	\$2,584.00
	6.04%	10.27%	11.13%	5.14%	-0.93%	-0.53%	5.86%	4.43%

Values in Million USD

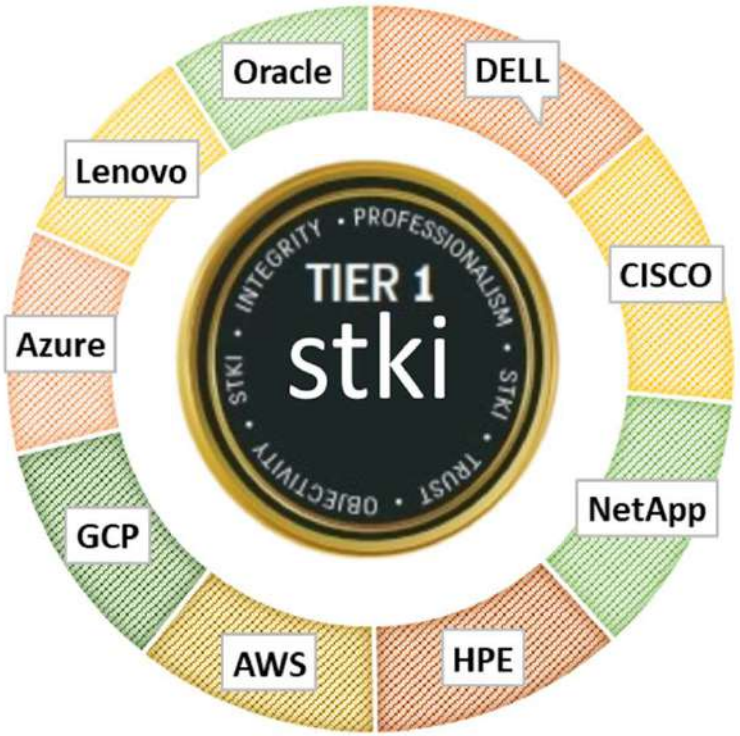
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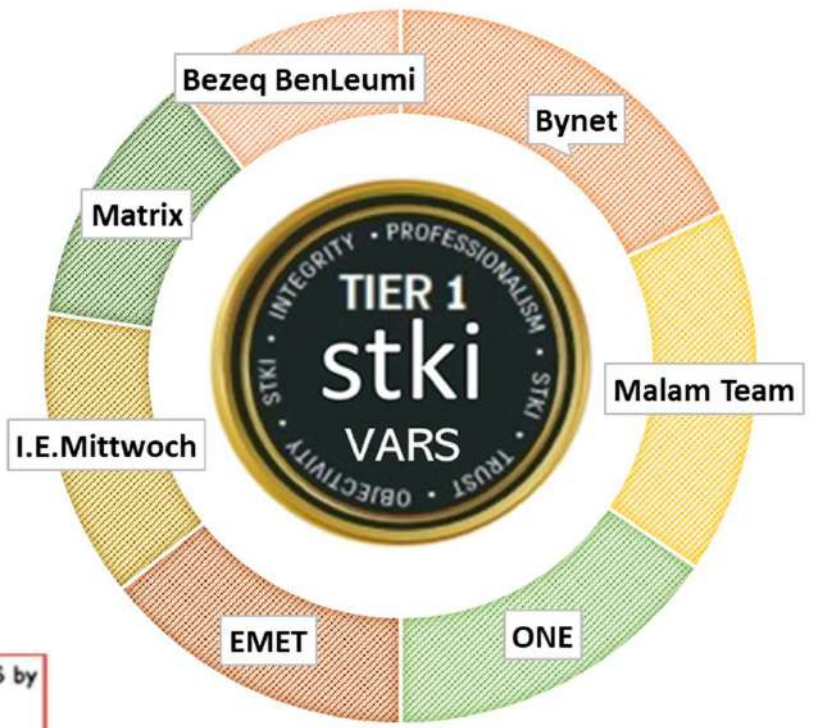


TOP VENDORS: Hardware-Infrastructure Markets

Infrastructure Suppliers



Infrastructure VARS



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Infrastructure Categories (pages)

Servers & Appliances

page: 95

Client PCs

page: 103

Enterprise Storage

page: 106

Networking, Call Centers
Security Appliances

page: 112

Data Center Equipment
Colocation & Self Service

page: 119

General Cloud
Consumption

page: 124





Servers & Appliances Market 2018 - 2026

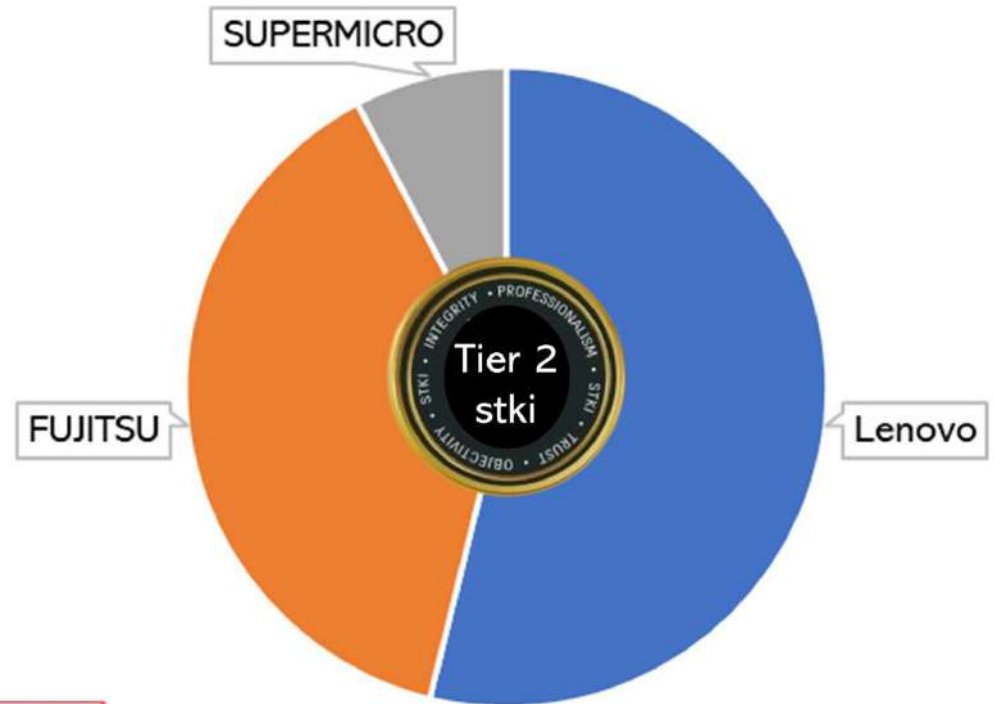
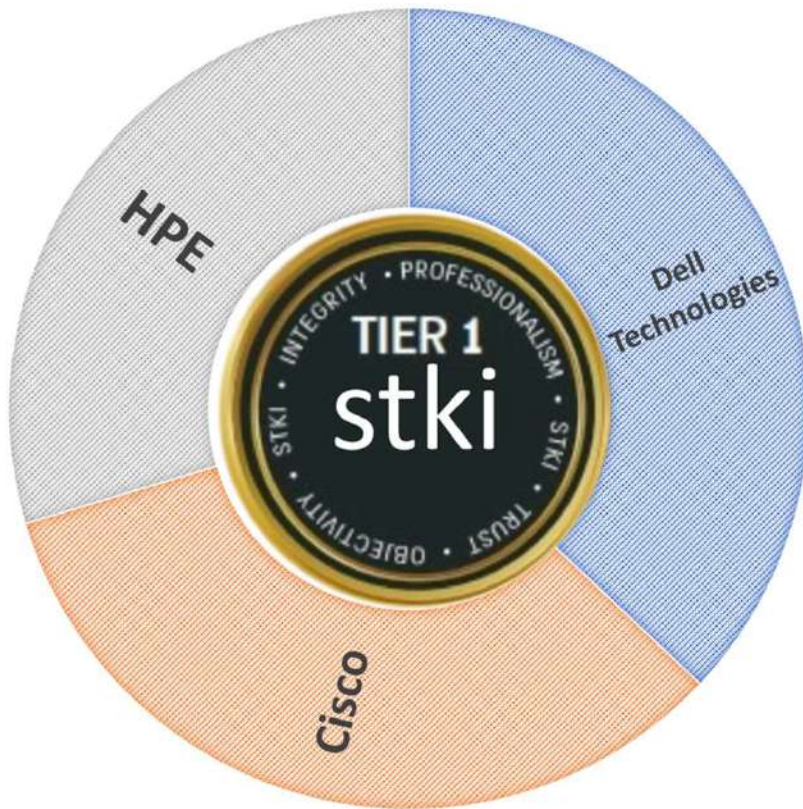
	2018		2019		2020		2021		2022		2023		2024		2025		2026
servers X86	\$305.00	1.64%	\$310.00	-6.45%	\$290.00	10.34%	\$320.00	1.56%	\$325.00	-2.15%	\$318.00	-4.09%	\$305.00	4.92%	\$320.00	1.56%	\$325.00
Legacy (non-x86)	\$32.00	-4.69%	\$30.50	-14.75%	\$26.00	19.23%	\$31.00	3.23%	\$32.00	-18.75%	\$26.00	-15.38%	\$22.00	-9.09%	\$20.00	25.00%	\$25.00
Data Appliances	\$13.00	15.38%	\$15.00	-13.33%	\$13.00	-15.38%	\$11.00	-9.09%	\$10.00	-10.00%	\$9.00	-5.56%	\$8.50	-11.76%	\$7.50	-6.67%	\$7.00
HCI appliances	\$36.00	25.00%	\$45.00	24.44%	\$56.00	25.00%	\$70.00	7.14%	\$75.00	4.00%	\$78.00	2.56%	\$80.00	1.00%	\$86.00	6.98%	\$92.00
TOTALS	\$386.00	3.76%	\$400.50	-3.87%	\$385.00	12.21%	\$432.00	2.31%	\$442.00	-2.49%	\$431.00	-3.60%	\$415.50	4.33%	\$433.50	3.58%	\$449.00

Values in Million USD



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SERVERS X86



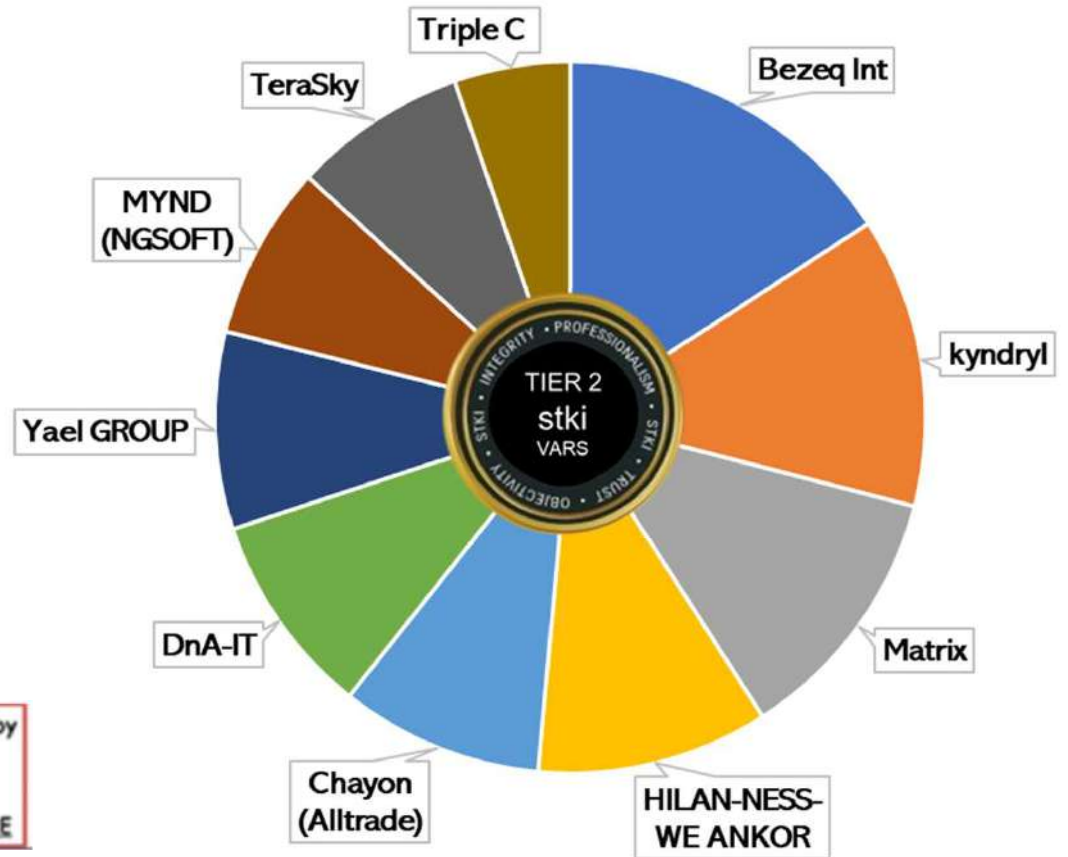
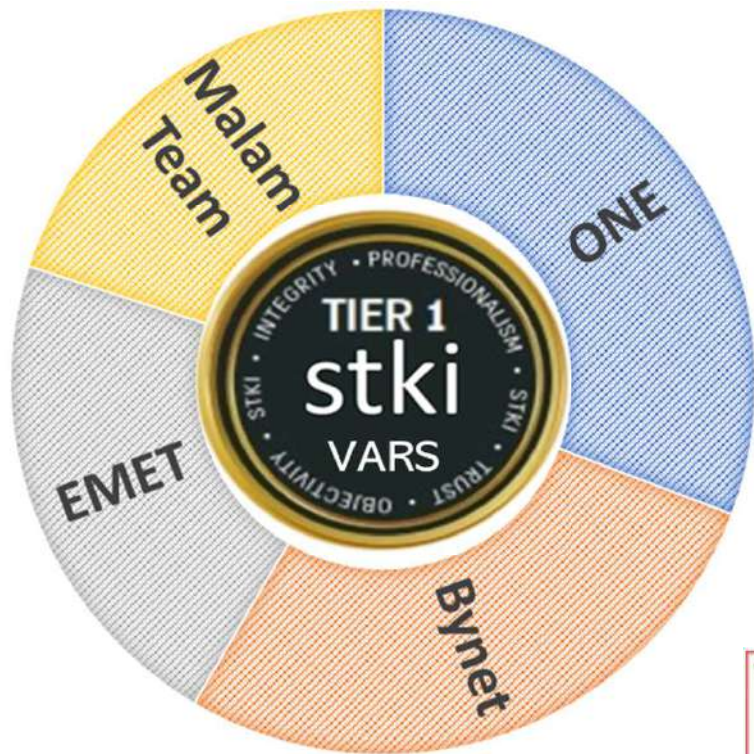
We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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Servers X86 VARs



We rank VENDORS by REVENUE and CLIENT MINDSHARE

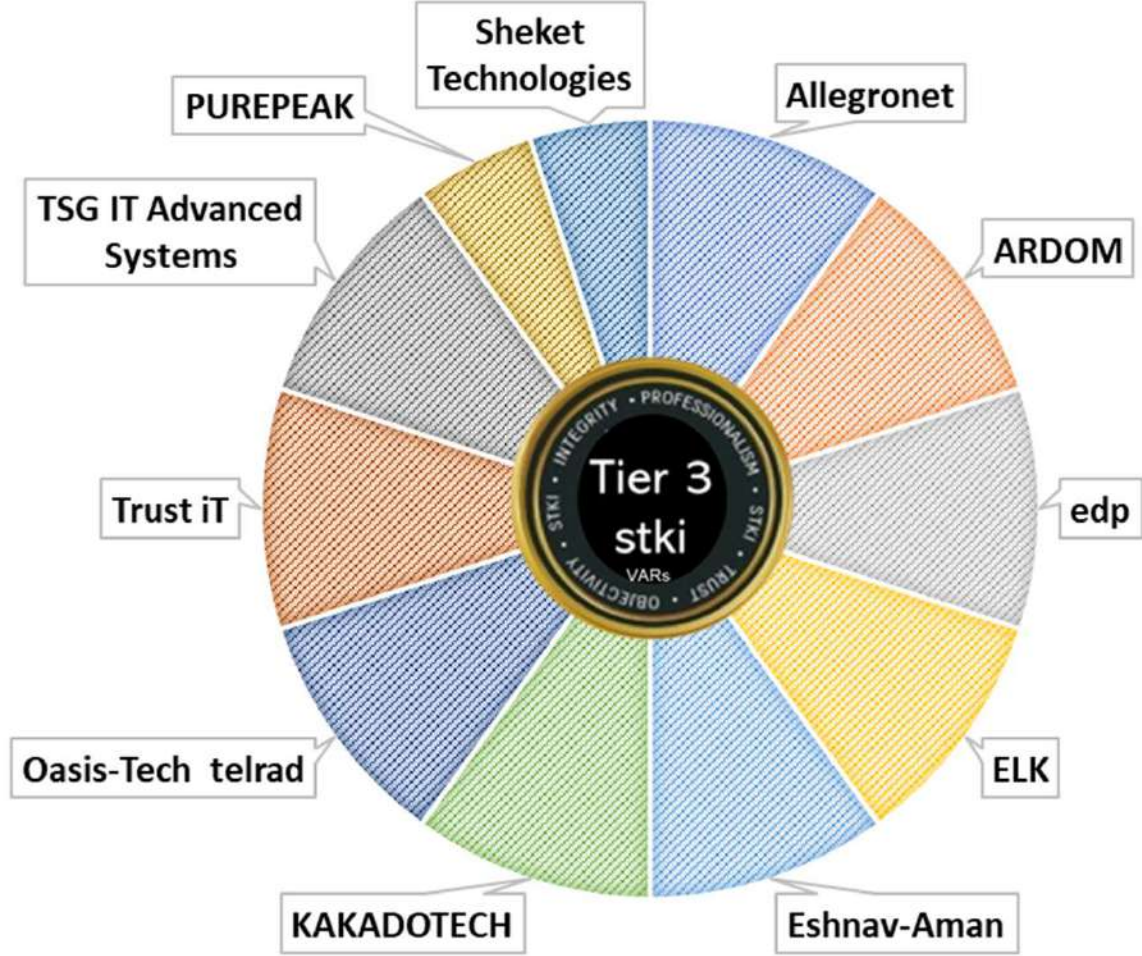


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Servers X86 VARs



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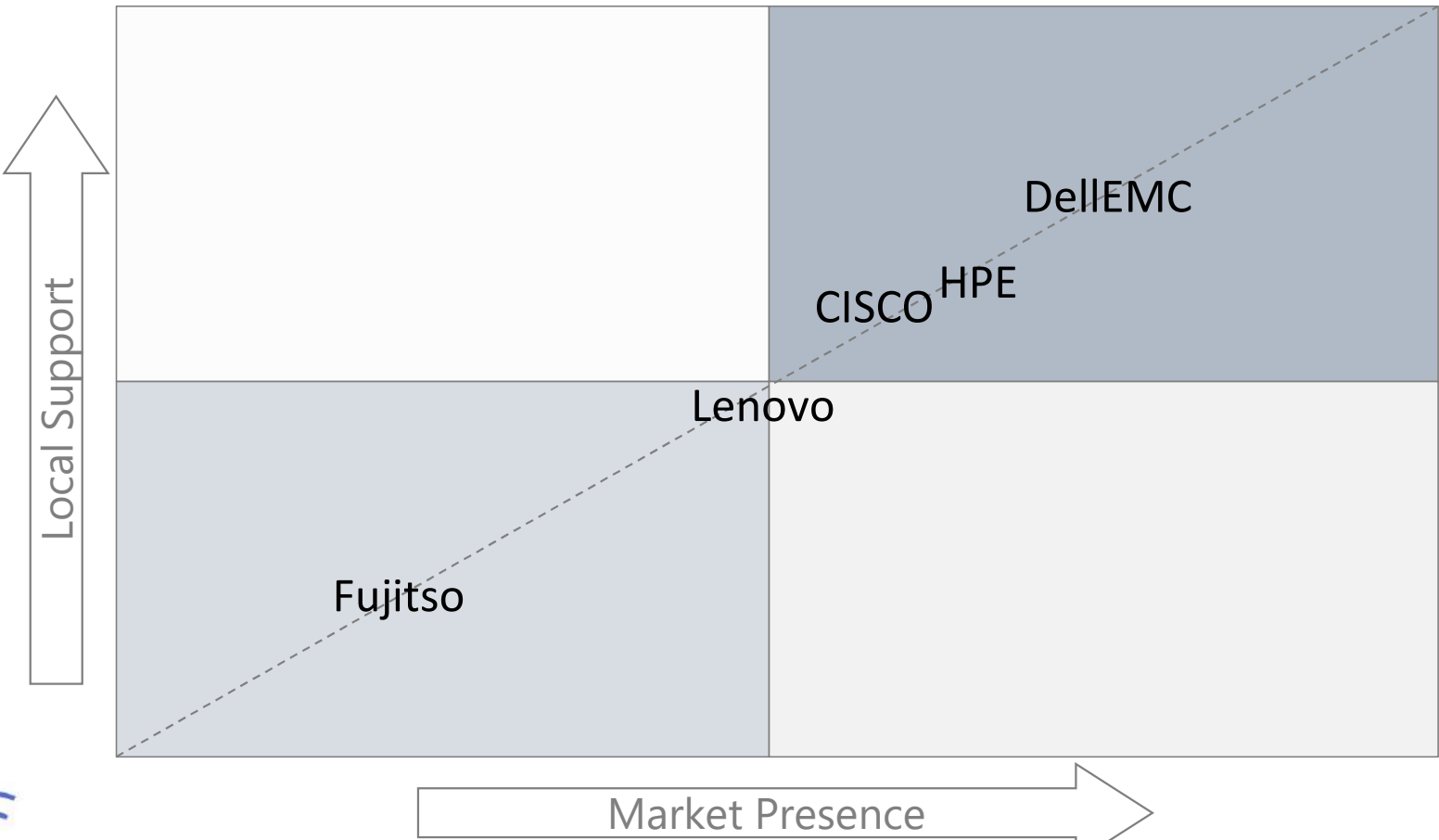


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General Purpose Intel Server - market presence 2024

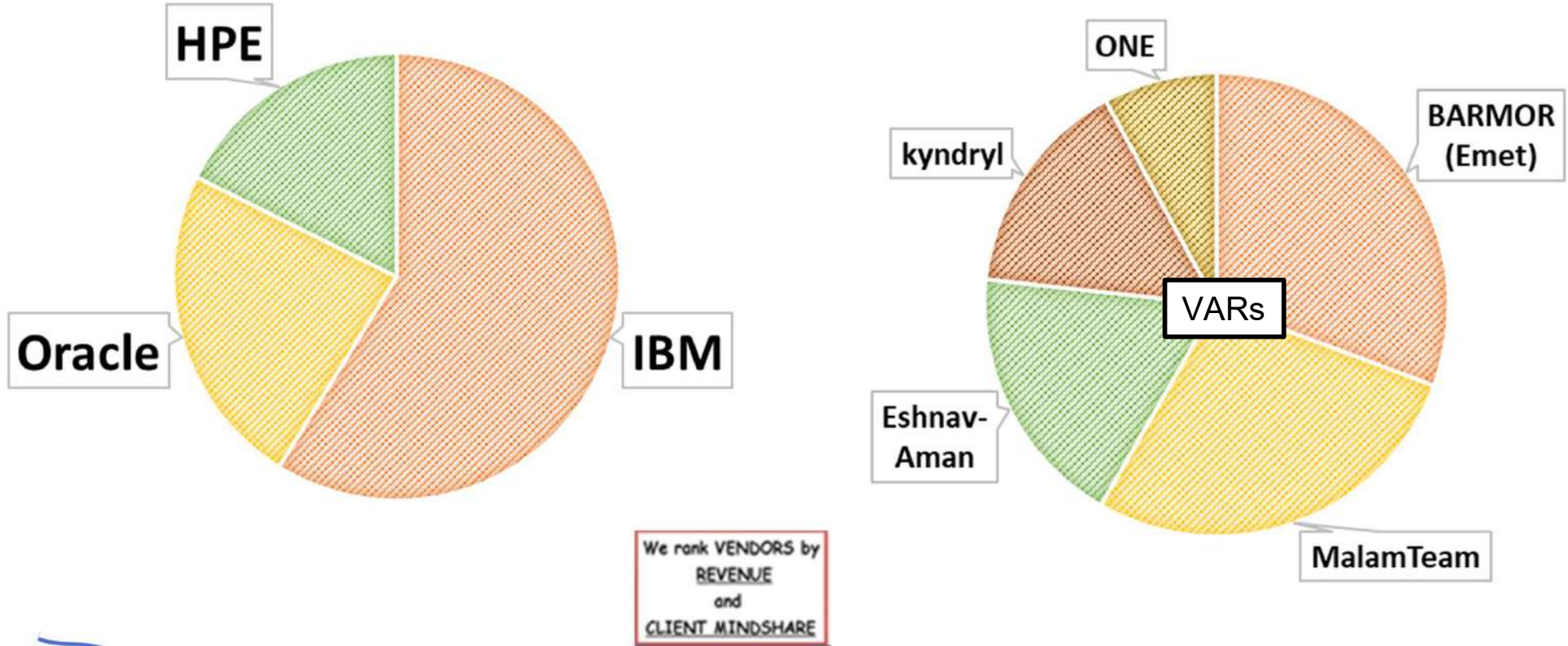


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Legacy (non-x86) Computer Systems

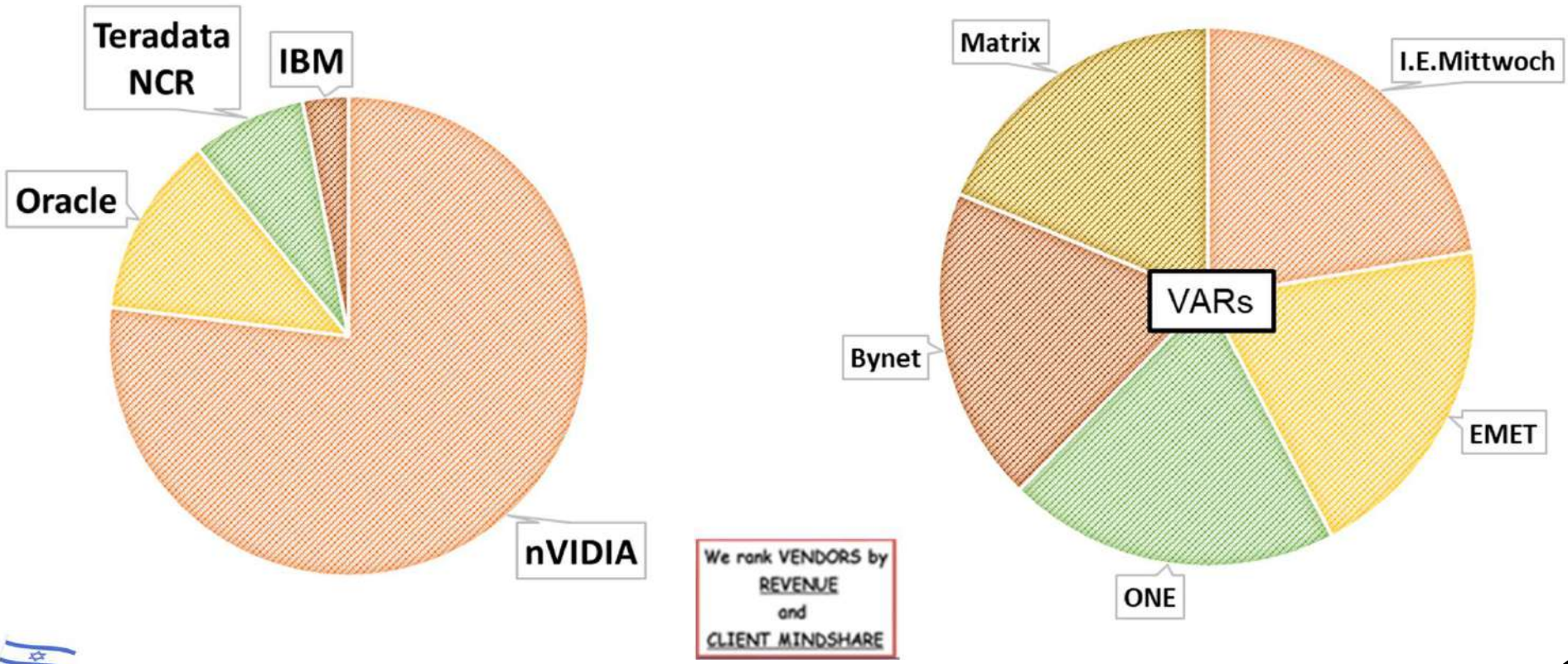


Infrastructure Market



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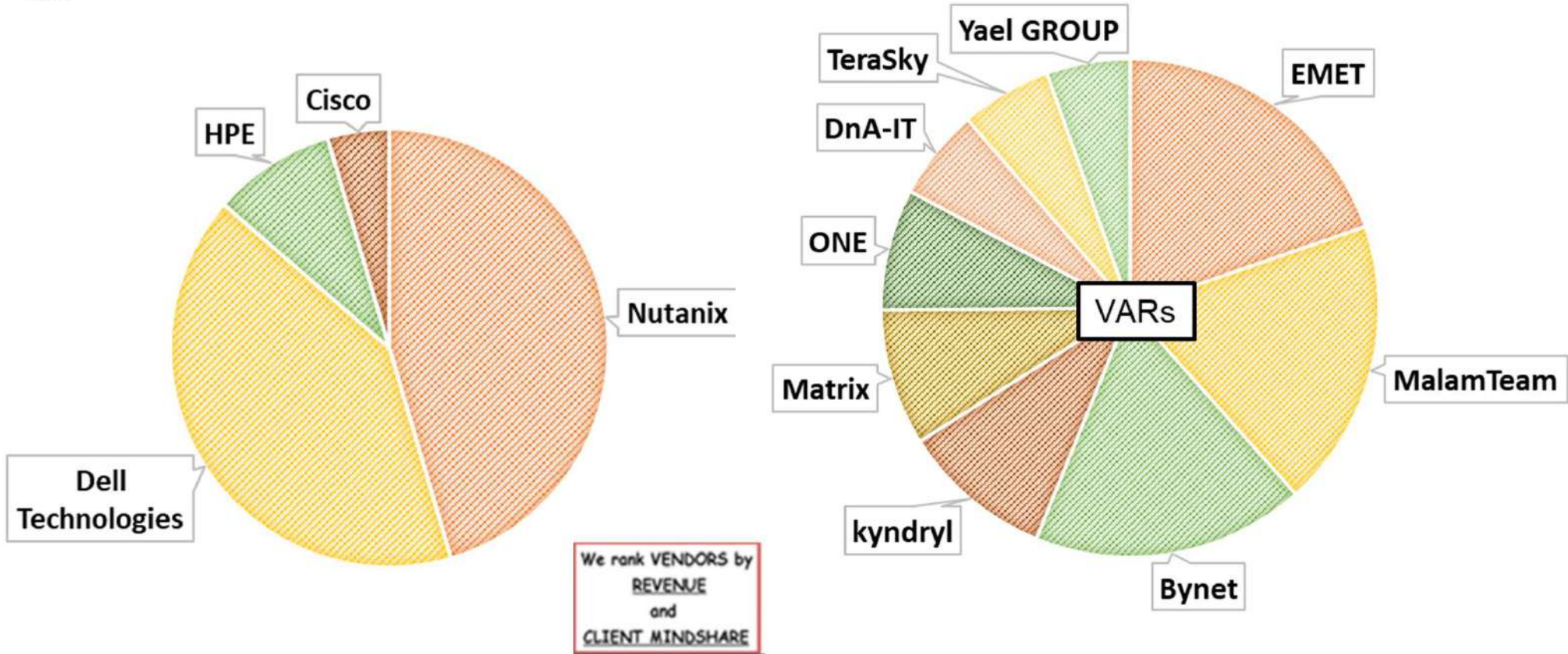
Data Appliances



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HCI Appliances



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Clients (enterprises only) Market 2018-2026

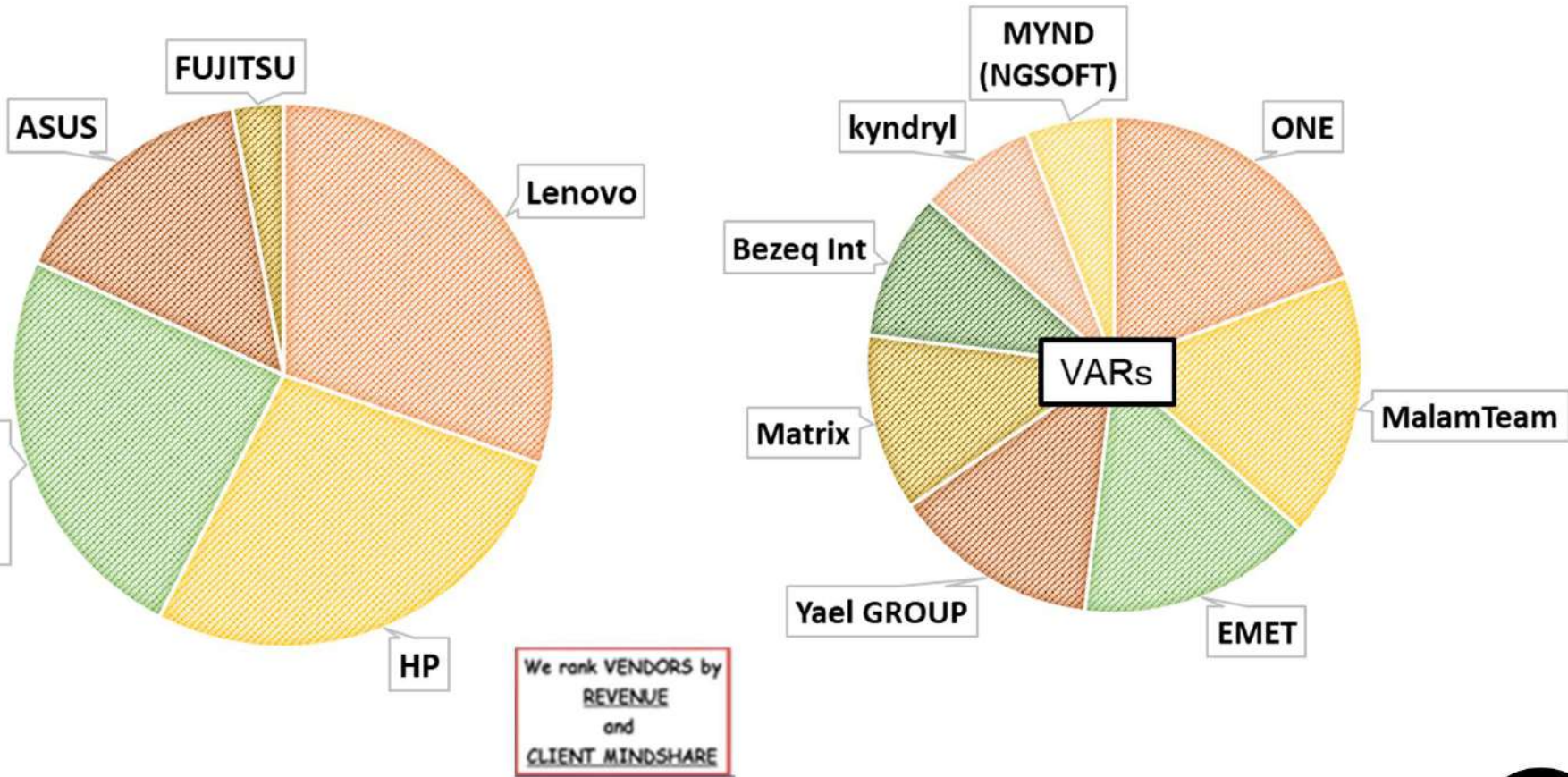
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Window PCs (Notebook & Desktops) Enterprise only	\$278.00	1.08%	\$281.00	28.83%	\$362.00	-3.31%	\$350.00	-18.57%	\$285.00	-12.28%	\$250.00	-20.00%	\$200.00	-7.50%	\$185.00	-18.92%	\$150.00
Non window's PC's Enterprise only	\$13.00	7.69%	\$14.00	50.00%	\$21.00	33.33%	\$28.00	-3.57%	\$27.00	-3.70%	\$26.00	-3.85%	\$25.00	8.00%	\$27.00	7.41%	\$29.00
TOTALS	\$291.00	1.37%	\$295.00	29.83%	\$383.00	-1.31%	\$378.00	-17.46%	\$312.00	-11.54%	\$276.00	-18.48%	\$225.00	-5.78%	\$212.00	-15.57%	\$179.00

Values in Million USD



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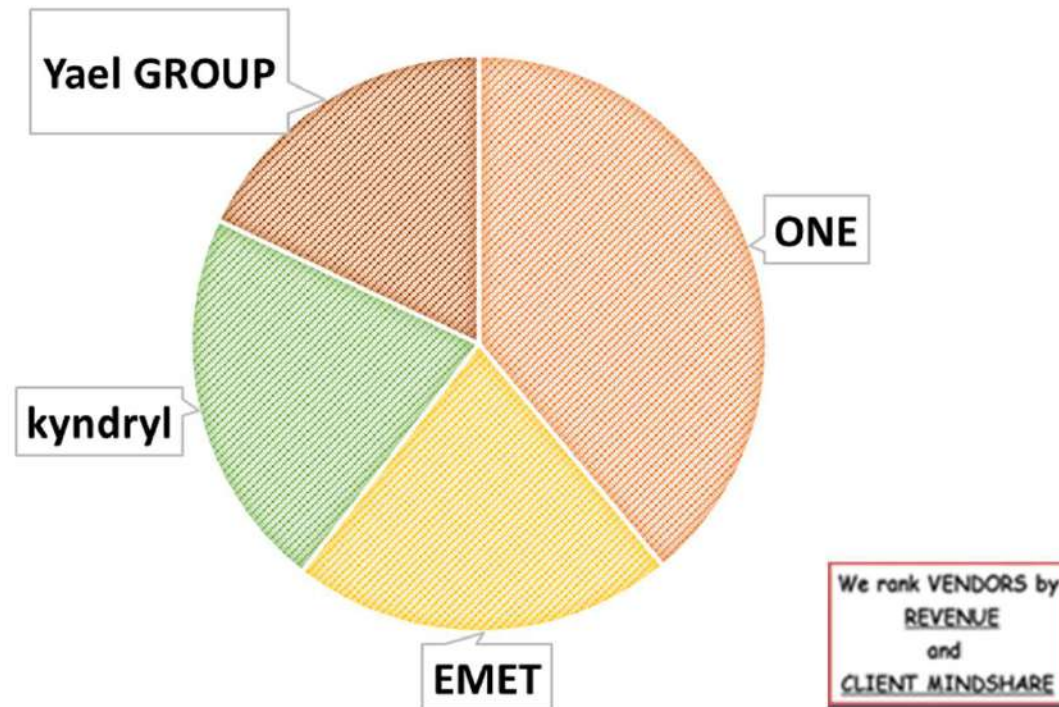
Window PCs (Notebook & Desktops) Enterprise only



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Non window's PC's (MAC IPADS) Enterprise only VARS



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Enterprise Storage Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Enterprise Storage : Disks (HHD and SSD)	\$119.50	2.93%	\$123.00	7.32%	\$132.00	2.27%	\$135.00	2.22%	\$138.00	2.90%	\$142.00	4.23%	\$148.00	4.73%	\$155.00	9.68%	\$170.00
Enterprise Storage Tape Libraries, VTL Backup and other storage Appliances	\$30.15	6.14%	\$32.00	31.25%	\$42.00	14.29%	\$48.00	4.17%	\$50.00	-4.00%	\$48.00	-4.17%	\$46.00	4.35%	\$48.00	4.17%	\$50.00
TOTALS	\$149.65	3.58%	\$155.00	12.26%	\$174.00	5.17%	\$183.00	2.73%	\$188.00	1.06%	\$190.00	2.11%	\$194.00	4.64%	\$203.00	8.37%	\$220.00

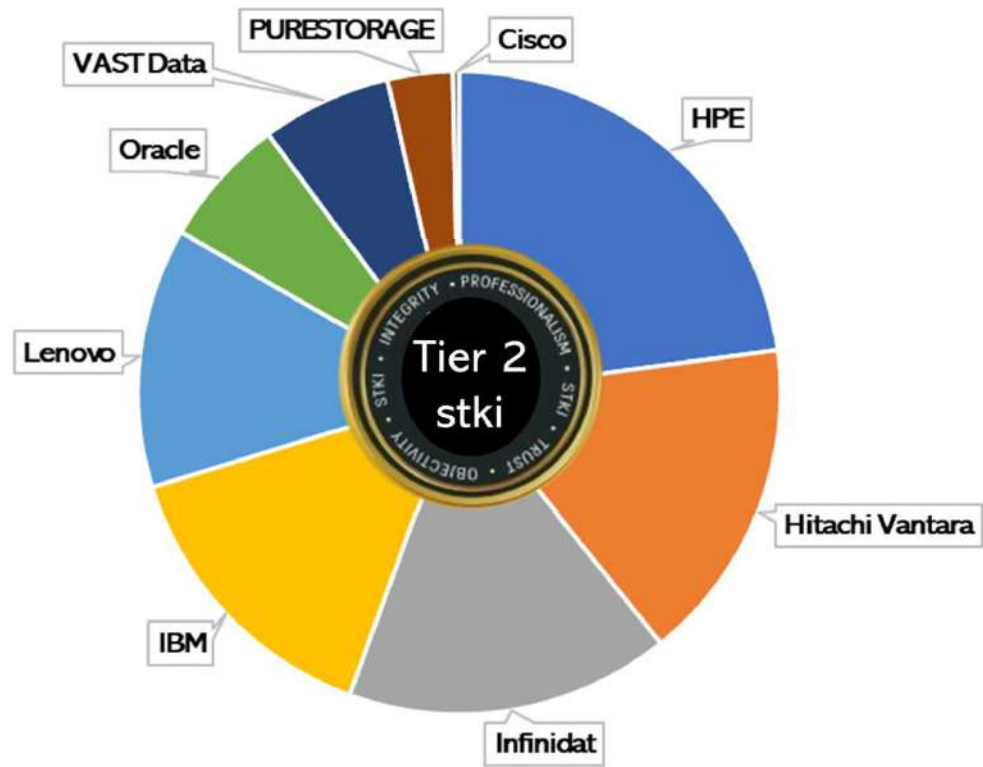
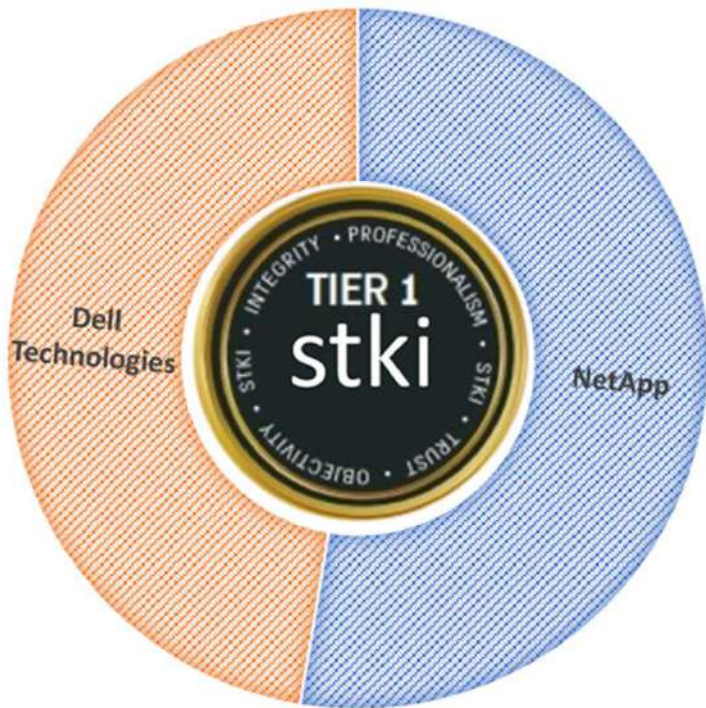
Values in Million USD



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Enterprise Storage Disks (HHD & SSD)



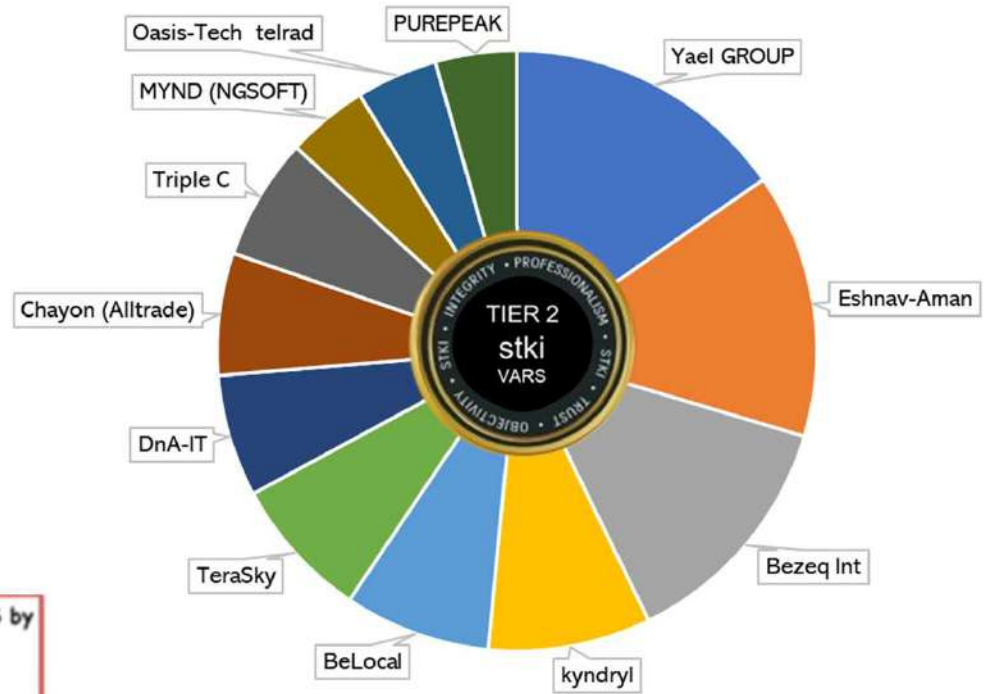
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REVENUE
and
CLIENT MINDSHARE



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Enterprise Storage Disks (HHD & SSD) VARs



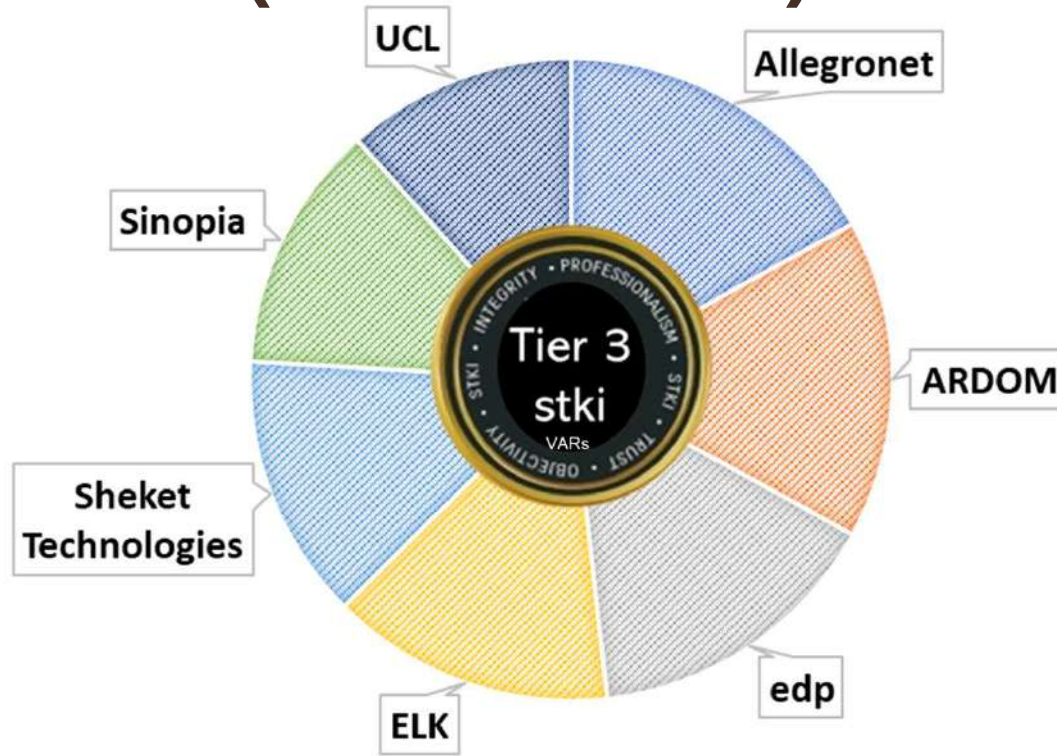
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Enterprise Storage Disks (HHD & SSD) VARs

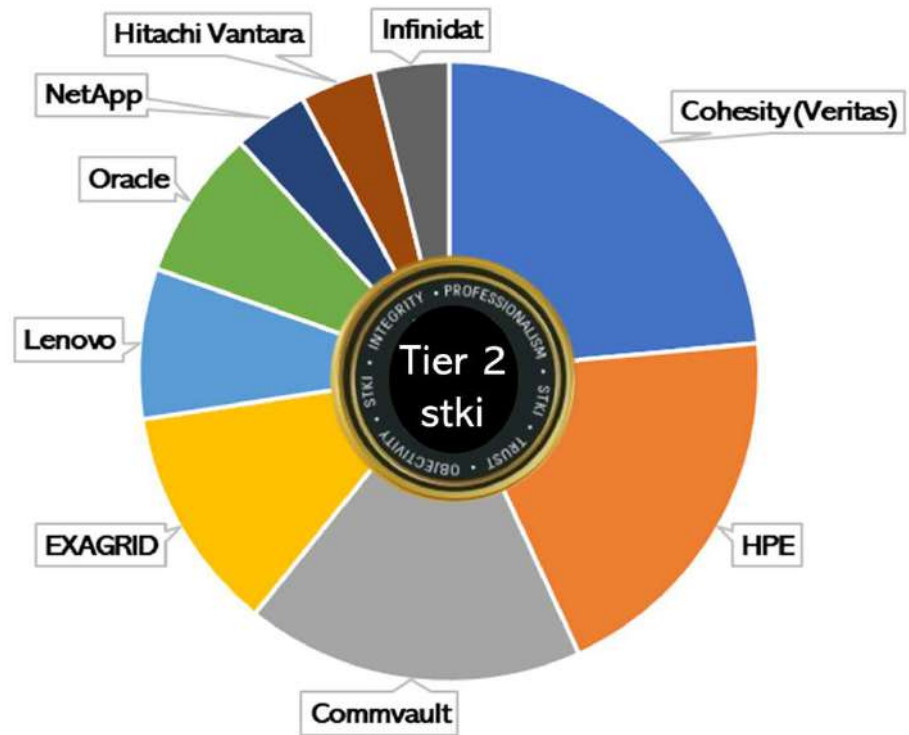
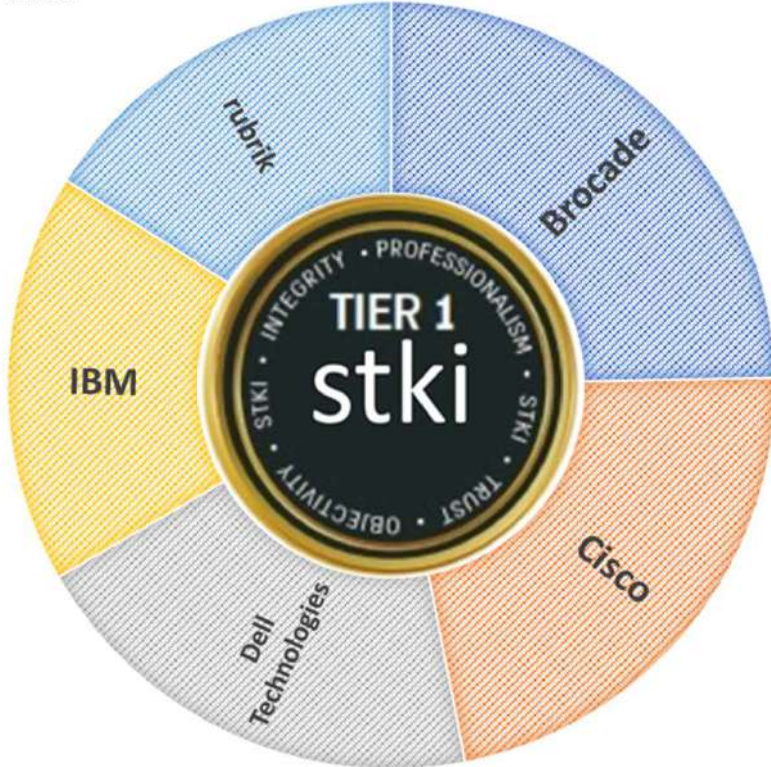


We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



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Enterprise Storage Tape Libraries, VTL, FC Switches, Backup & other Storage Appliances



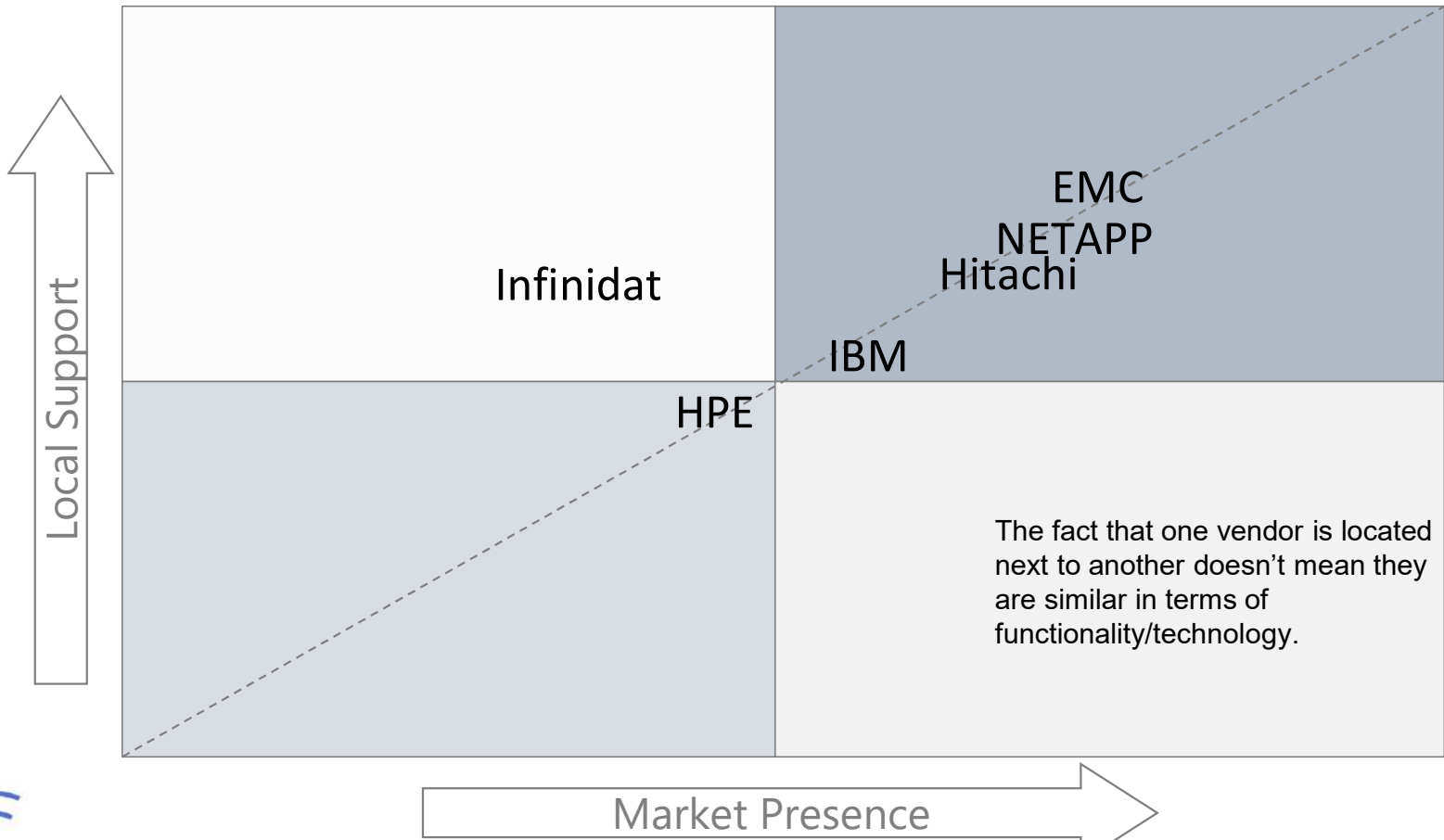
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Israel enterprise high end for critical systems storage market presence 2024



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Networking, VoIP/Call Center, Call Center as a Service, Security Appliances Market 2018-2026

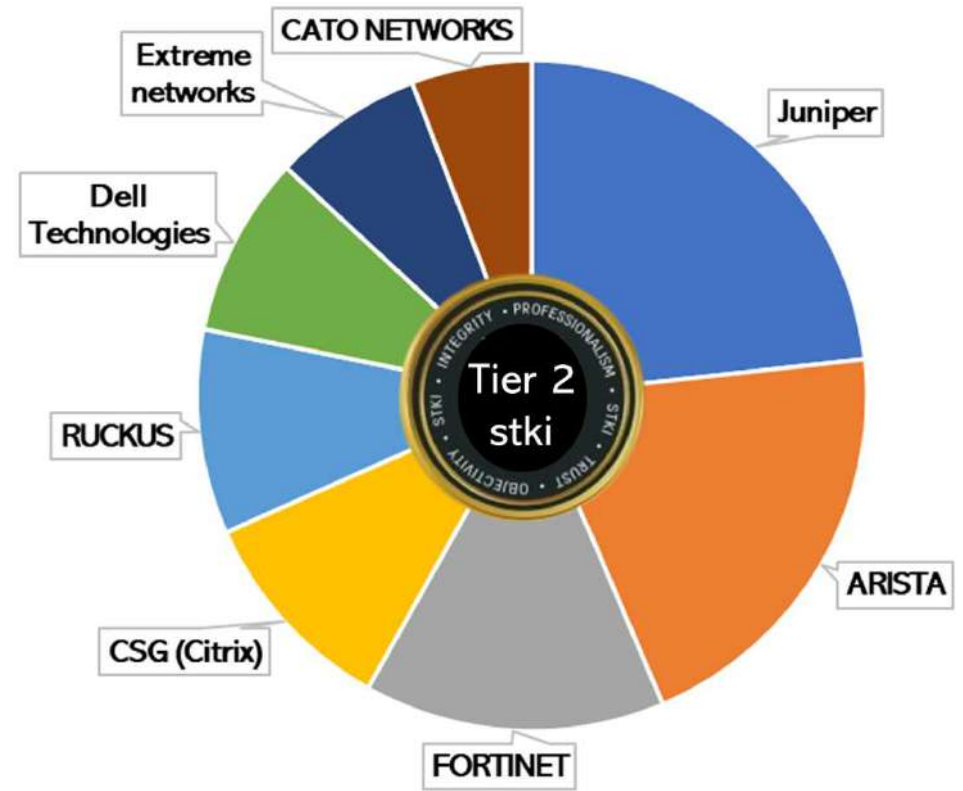
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Enterprise Networking	\$220.00	2.27%	\$225.00	4.44%	\$235.00	10.64%	\$260.00	1.92%	\$265.00	-5.66%	\$250.00	-6.00%	\$235.00	4.26%	\$245.00	4.08%	\$255.00
Security / Cyber Appliances	\$148.00	5.41%	\$156.00	15.38%	\$180.00	8.33%	\$195.00	4.10%	\$203.00	2.46%	\$208.00	5.77%	\$220.00	4.55%	\$230.00	4.35%	\$240.00
VoIP/Call Center Equipment	\$51.50	2.91%	\$53.00	47.17%	\$78.00	10.26%	\$86.00	6.98%	\$92.00	3.26%	\$95.00	5.26%	\$100.00	8.00%	\$108.00	6.48%	\$115.00
Call Center as a Service	\$5.00	60.00%	\$8.00	125.00%	\$18.00	66.67%	\$30.00	16.67%	\$35.00	-5.71%	\$33.00	6.06%	\$35.00	8.57%	\$38.00	10.53%	\$42.00
TOTALS	\$424.50	4.12%	\$442.00	15.61%	\$511.00	11.74%	\$571.00	4.20%	\$595.00	-1.51%	\$586.00	0.68%	\$590.00	5.25%	\$621.00	4.99%	\$652.00

Values in Million USD



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Enterprise & Data Center Networking

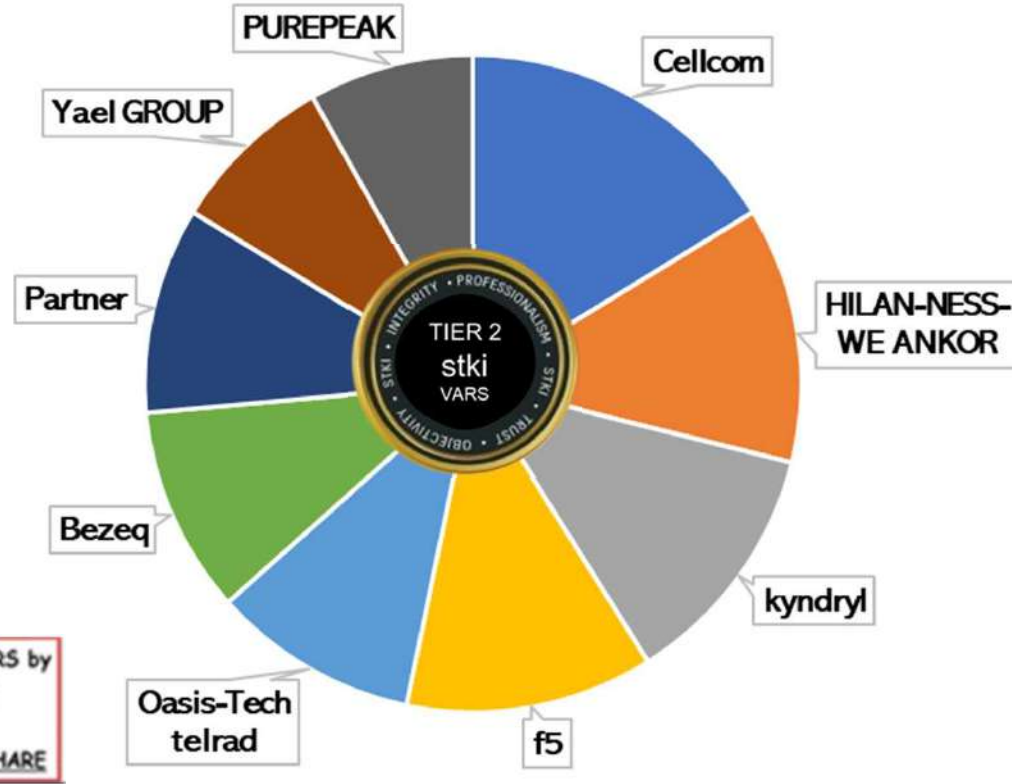
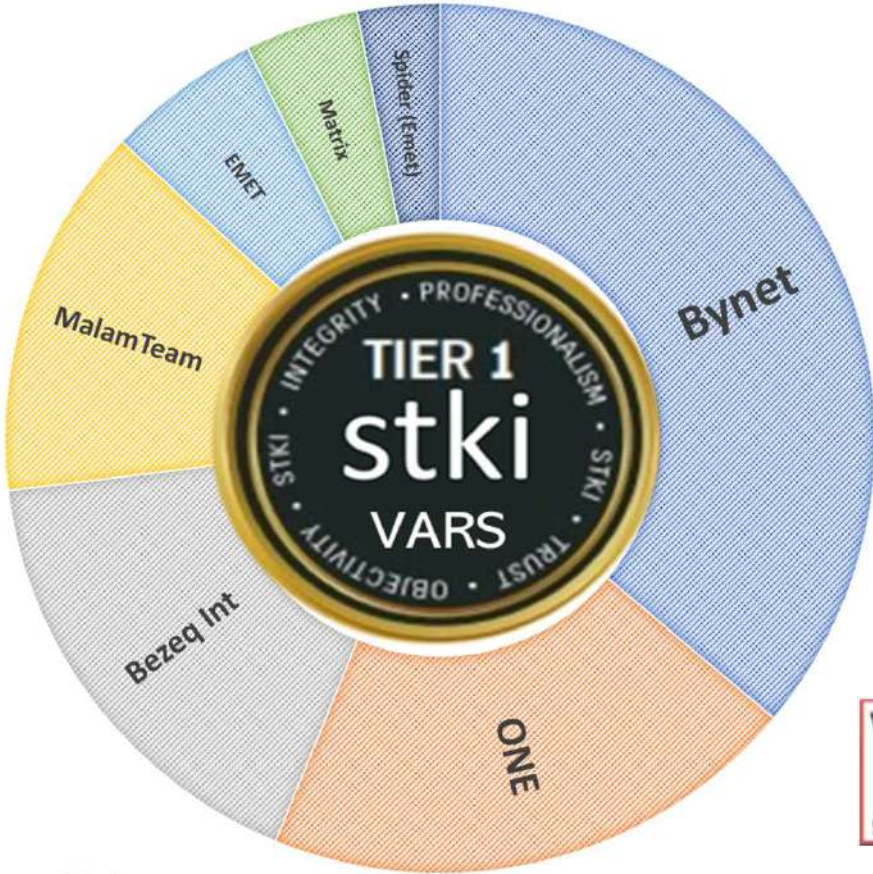


We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Enterprise & Data Center Networking VARs

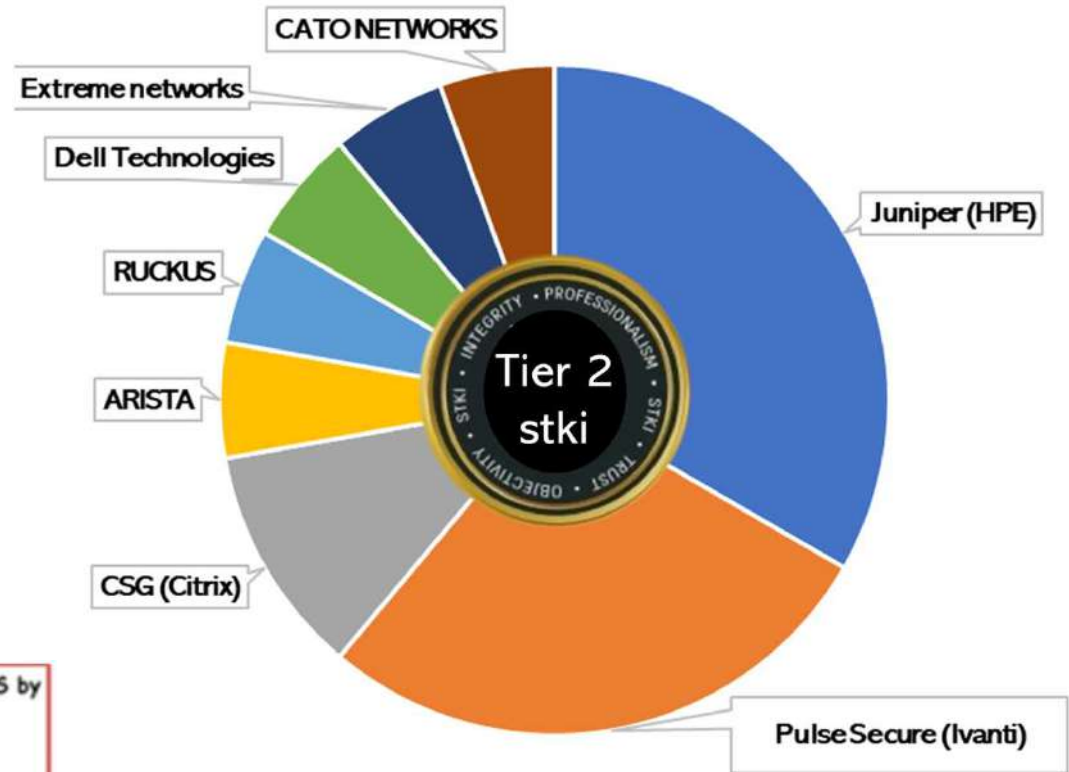
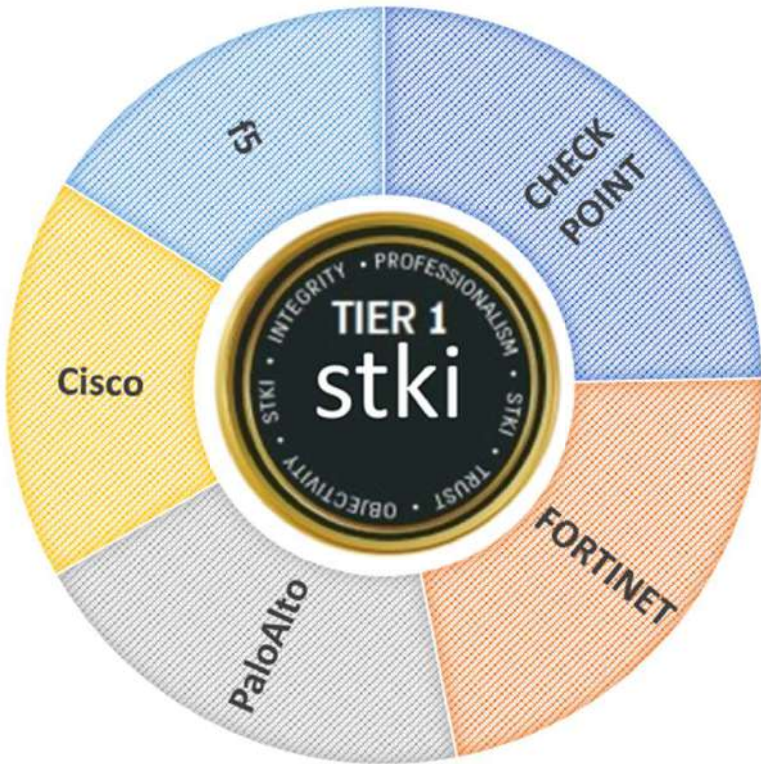


We rank VENDORS by
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Security/ Cyber Appliances

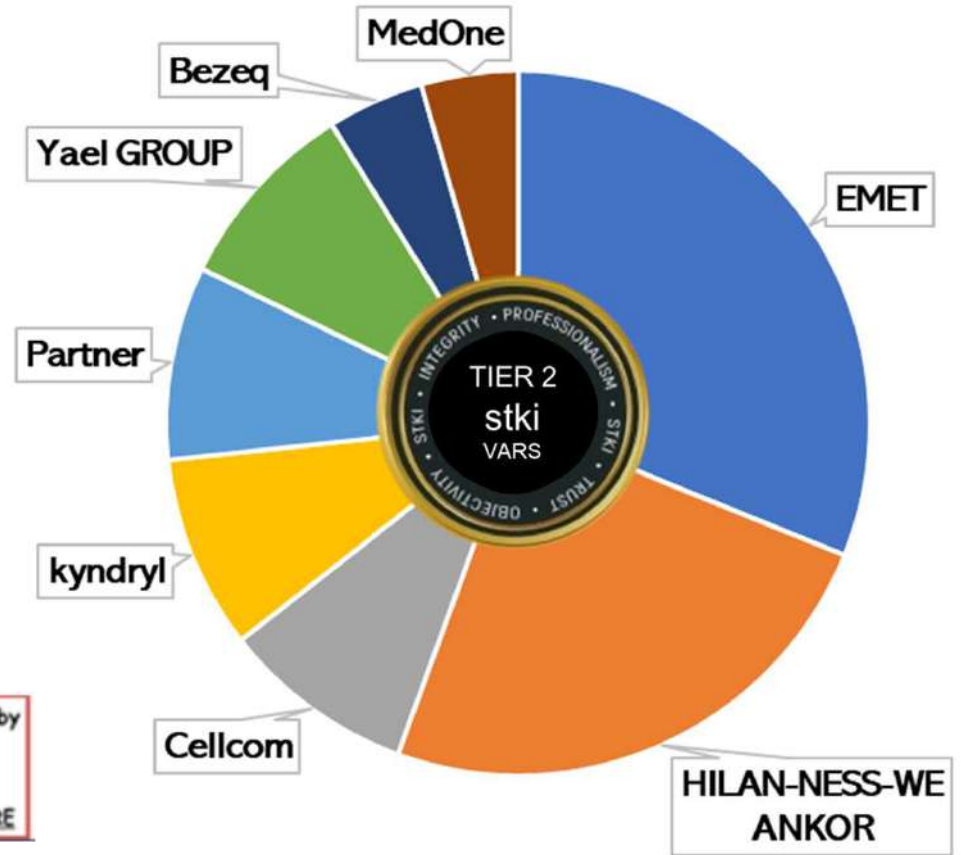


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Security/ Cyber Appliances VARs



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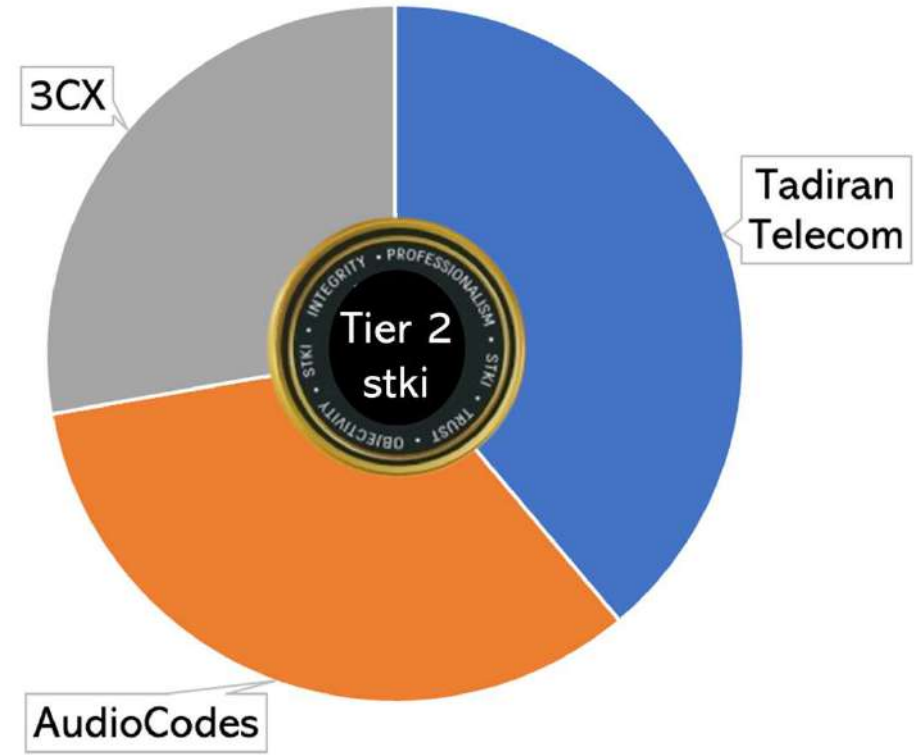
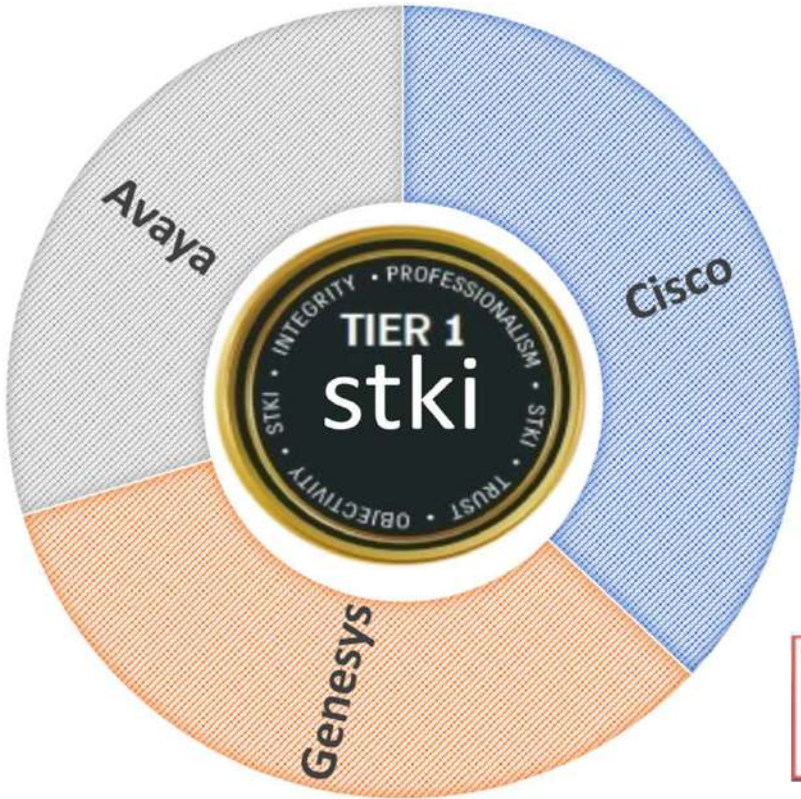


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VoIP / Call Center Equipment



Infrastructure Market

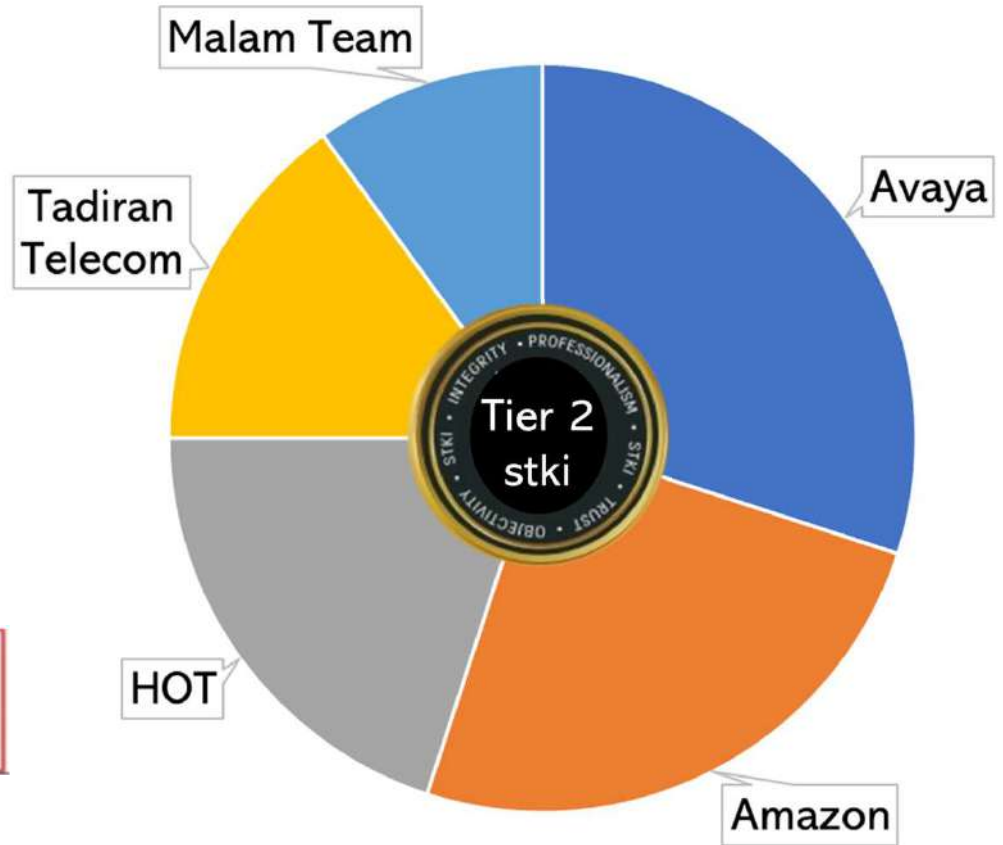
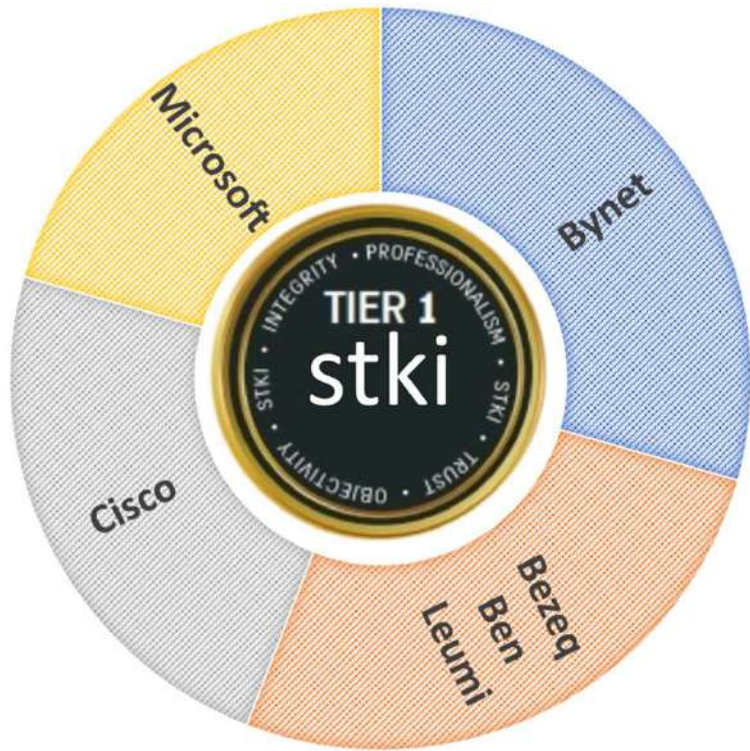


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CALL CENTER as a SERVICE



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Data Center Equipment , Co-location Services, Self Service (POS, Robot, Self Service, ATM, Kiosks) Market 2018-2026

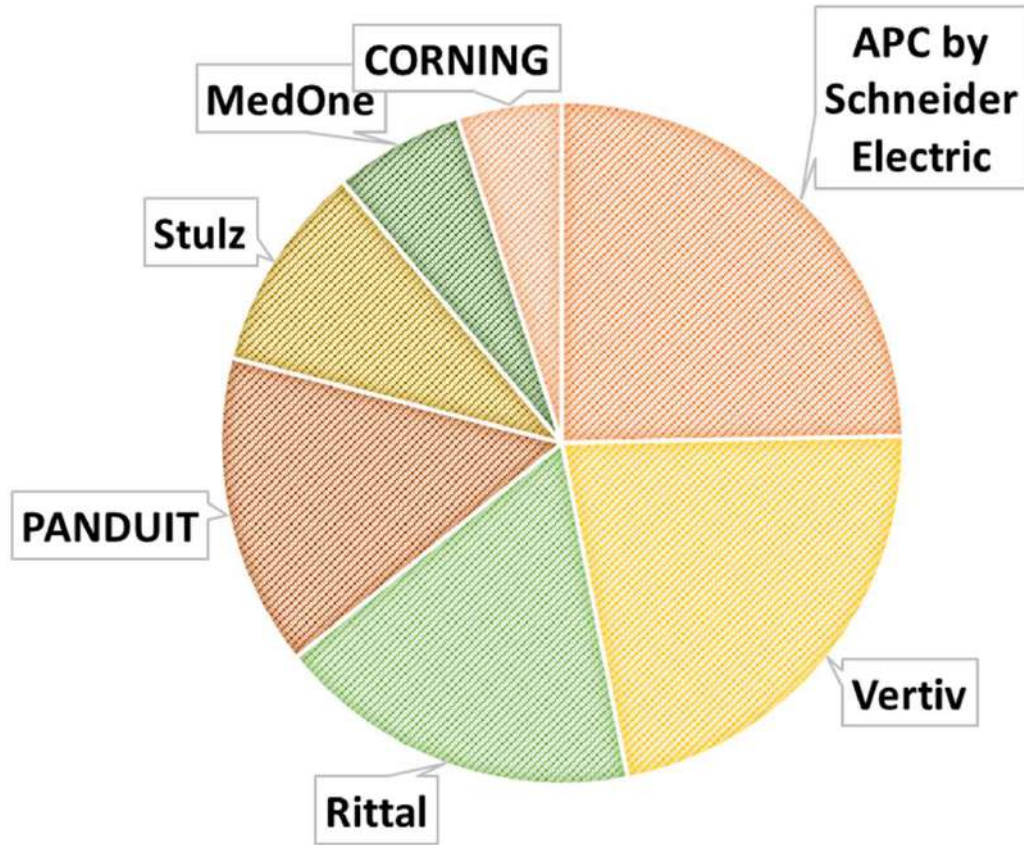
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Data Center Physical Equipment	\$97.00	2.58%	\$99.50	-14.57%	\$85.00	20.00%	\$102.00	2.94%	\$105.00	-2.86%	\$102.00	-3.92%	\$98.00	-3.06%	\$95.00	-3.16%	\$92.00
Off-site Data Center: Co-Location;	\$88.00	6.82%	\$94.00	8.51%	\$102.00	22.55%	\$125.00	28.00%	\$160.00	15.63%	\$185.00	13.51%	\$210.00	11.90%	\$235.00	2.13%	\$240.00
POS , Robot , Self Service (ATM/Kiosks/other)	\$170.00	8.82%	\$185.00	2.70%	\$190.00	7.89%	\$205.00	2.44%	\$210.00	-4.76%	\$200.00	-7.50%	\$185.00	5.41%	\$195.00	3.59%	\$202.00
TOTALS	\$355.00	6.62%	\$378.50	-0.40%	\$377.00	14.59%	\$432.00	9.95%	\$475.00	2.53%	\$487.00	1.23%	\$493.00	6.49%	\$525.00	1.71%	\$534.00

Values in Million USD



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Data Center Physical Equipment



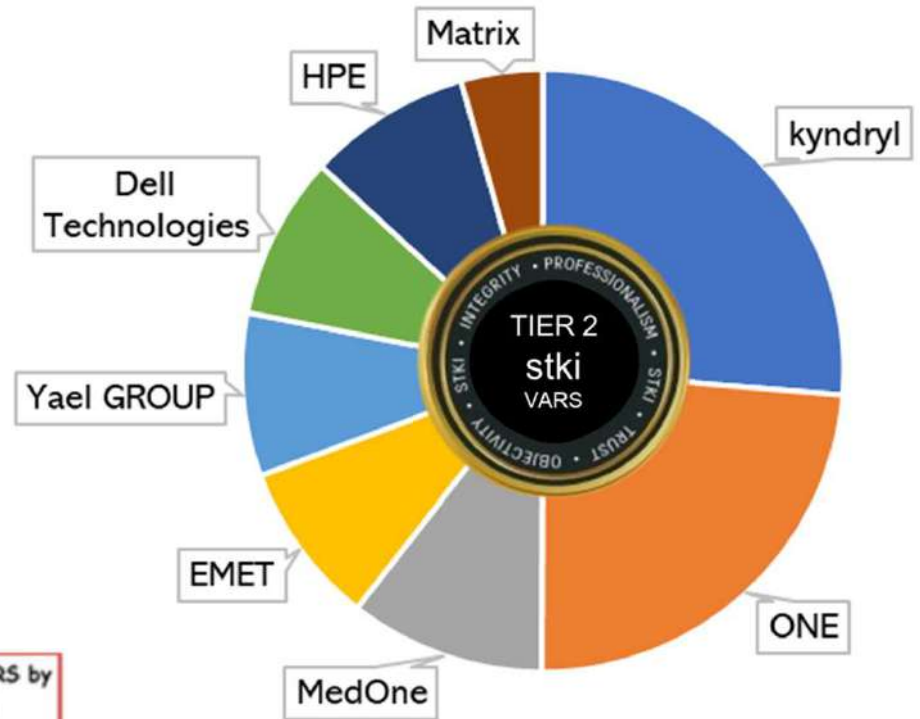
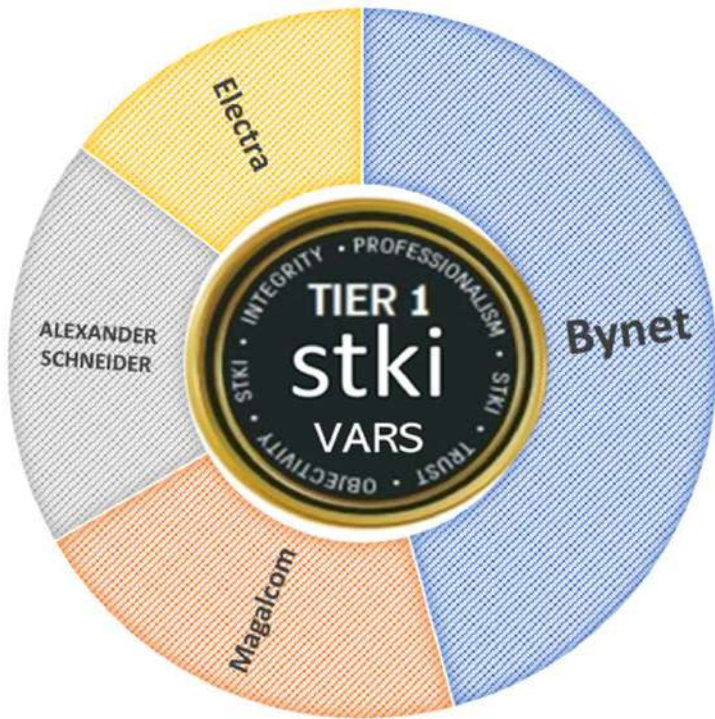
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Data Center Physical Equipment VARs



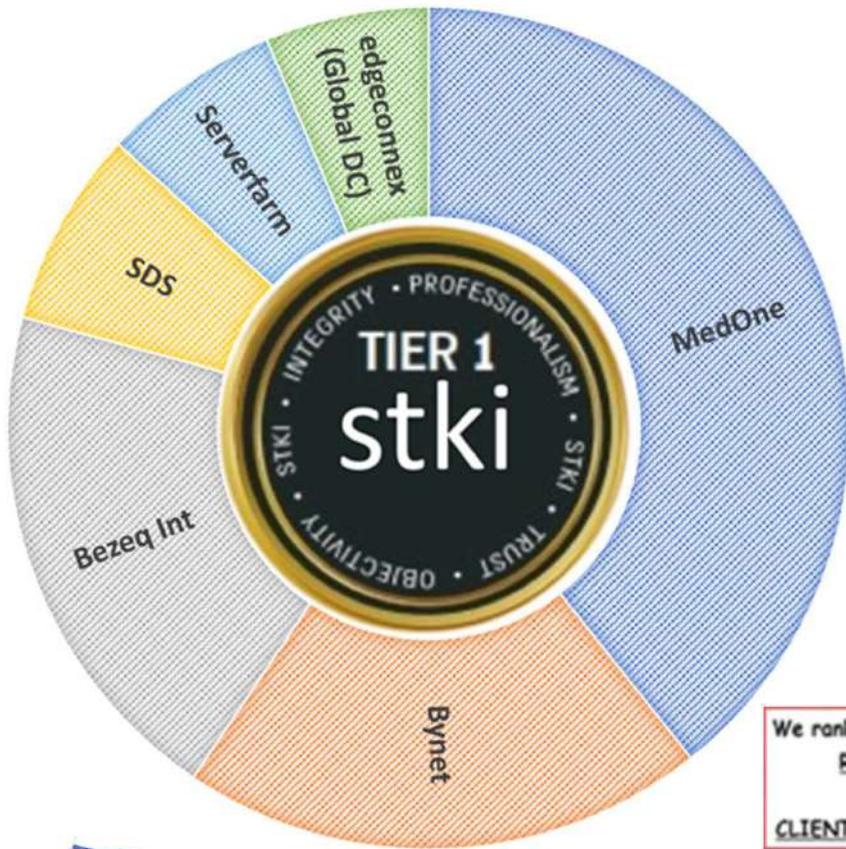
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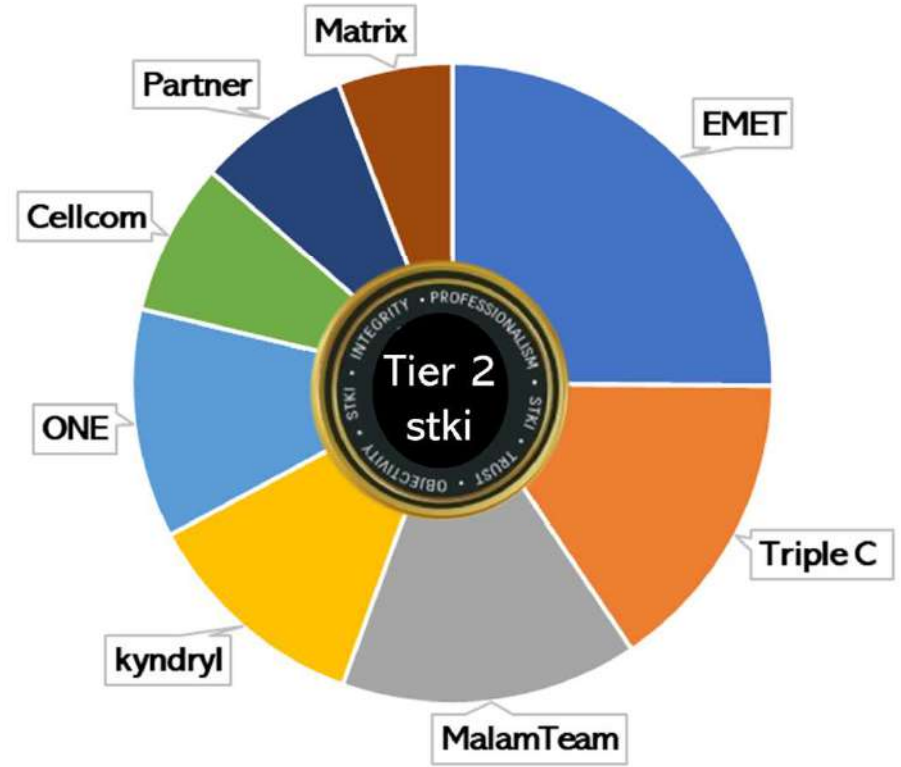
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Off-Site Data Center, Co-location, Hosting (client owns the HW)



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under construction



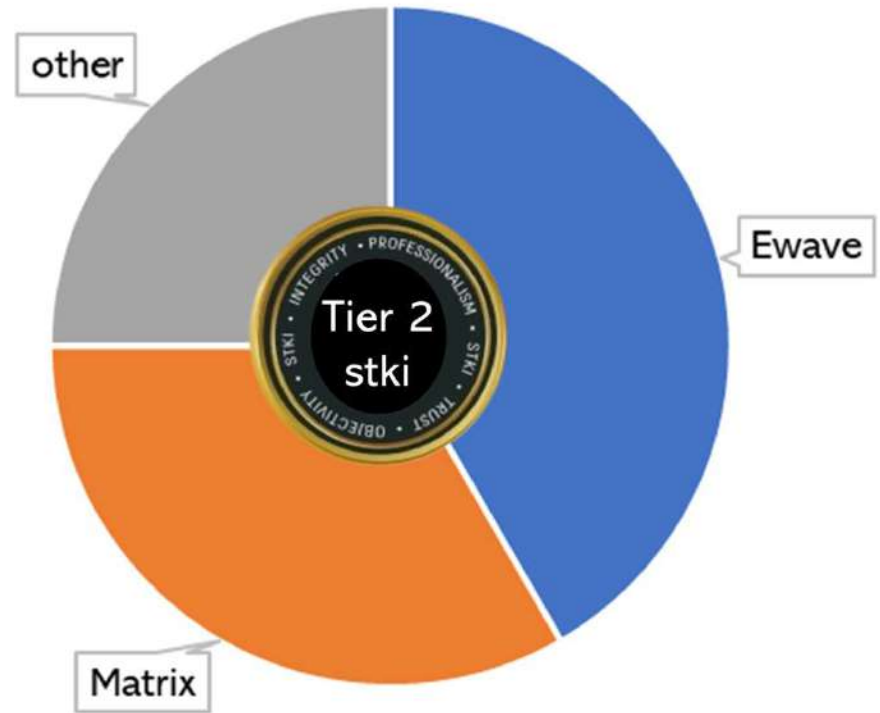
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POS, Robots (enterprise use only) & other SELF SERVICE (ATM, KIOSKS, OTHER)



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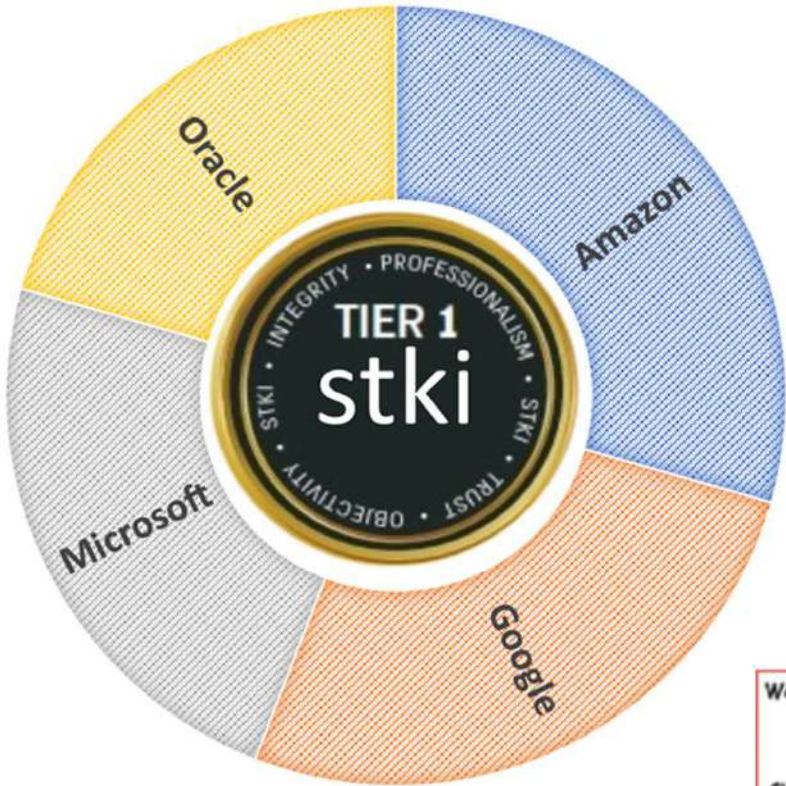
General Purpose Cloud Enterprise Consumption Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
General Purpose Cloud Enterprise Consumption	\$130.00	30.77%	\$170.00	17.65%	\$200.00	30.00%	\$260.00	38.46%	\$360.00	5.56%	\$380.00	10.53%	\$420.00	14.29%	\$480.00	14.58%	\$550.00
TOTALS	\$130.00	30.77%	\$170.00	17.65%	\$200.00	30.00%	\$260.00	38.46%	\$360.00	5.56%	\$380.00	10.53%	\$420.00	14.29%	\$480.00	14.58%	\$550.00

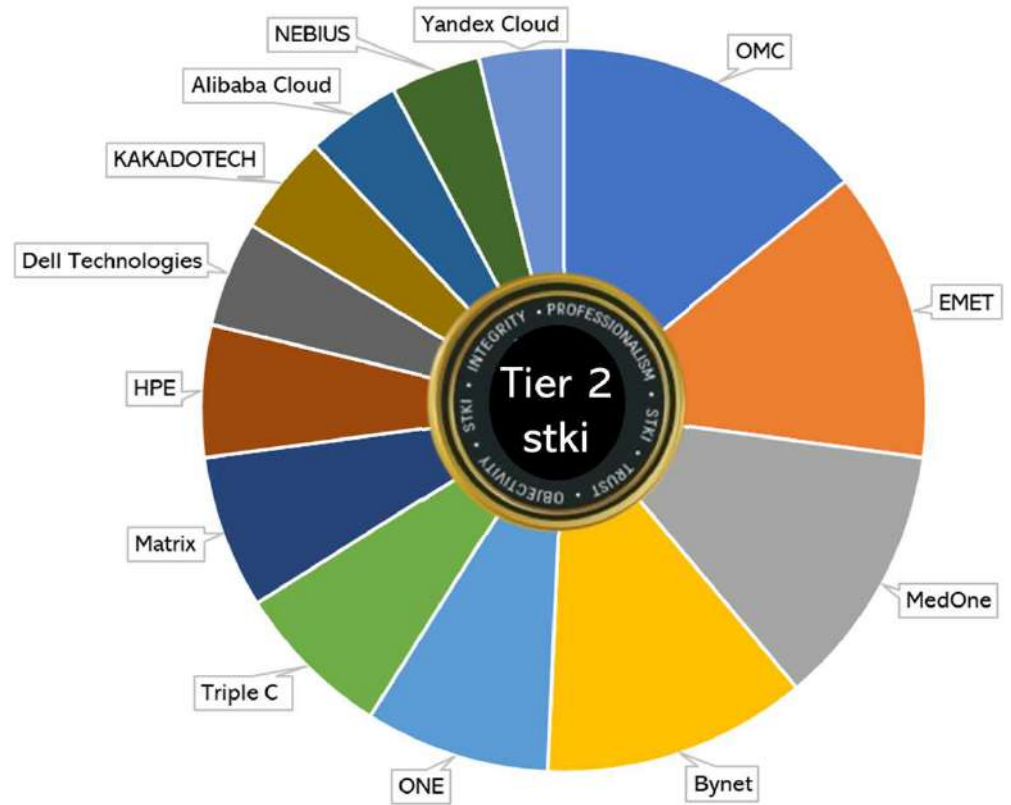


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General Purpose Cloud Consumption

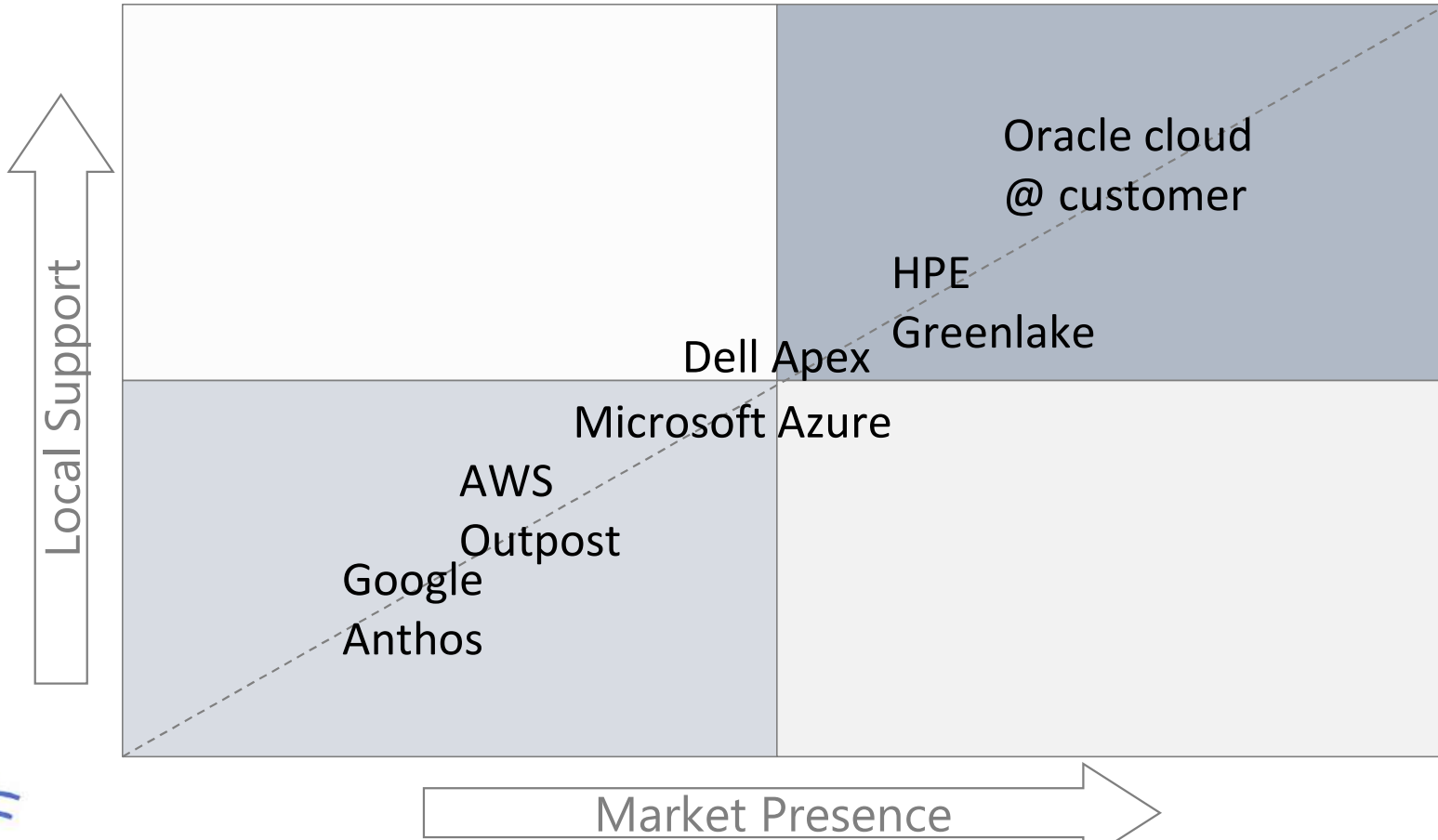


We rank VENDORS by
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Cloud on premise for Israeli Enterprises- market presence 2024



This diagram is not “apples to apples” comparison – it contains all kind of DC located “public cloud”



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Israel

Software Product Markets 2024

"vendor rankings"



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



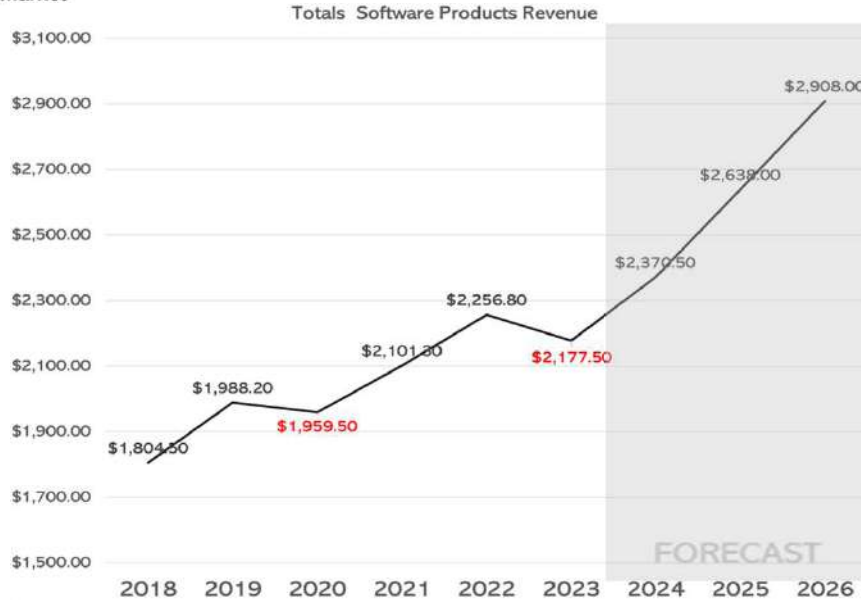
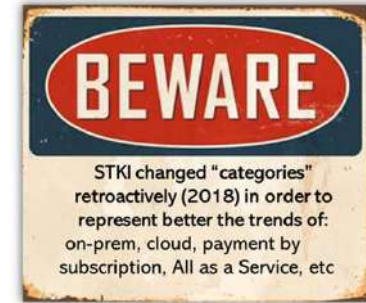
GenAI Analyst

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

STKI Research Team



Software (on-prem & cloud) Market 2018-2026



Values in Million USD

2018	2019	2020	2021	2022	2023	2024	2025	2026
\$1,804.50	\$1,988.20	\$1,959.50	\$2,101.30	\$2,256.80	\$2,177.50	\$2,370.50	\$2,638.00	\$2,908.00
	10.18%	-1.44%	7.24%	7.40%	-3.51%	8.86%	11.28%	10.24%



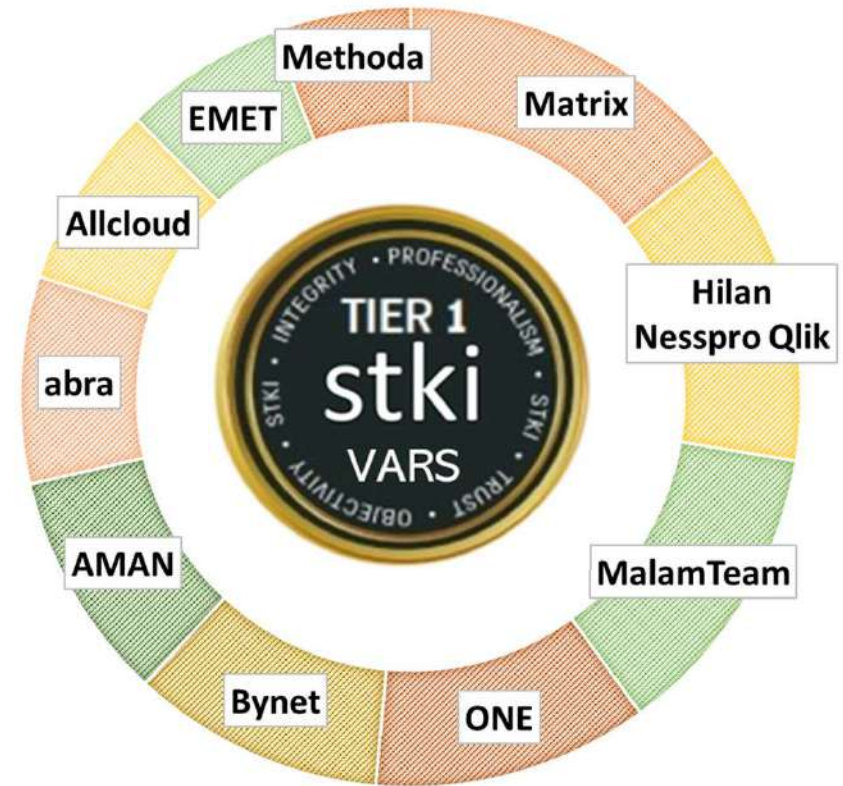
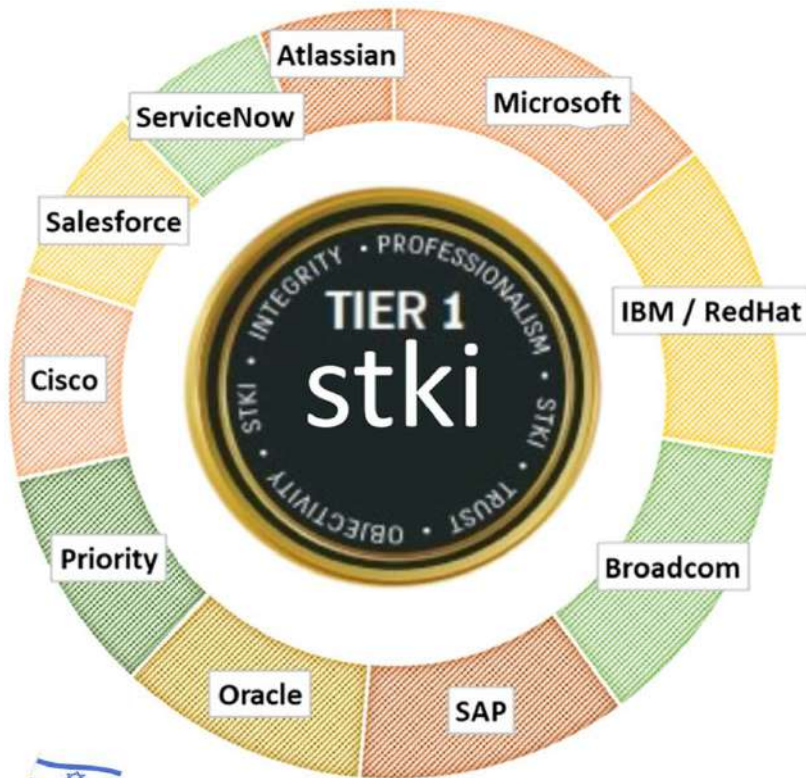
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TOP VENDORS: Software Markets

Software Companies

Software VARS



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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SOFTWARE CATEGORIES (pages)

Storage & Backup Tools page: 131	Middleware Tools page: 137	IT Management & Operations Tools page: 141	Security & Cyber Tools page: 158	Project Development & Management Tools page: 171
EGRC Tools page: 179	Knowledge & Collaboration Tools page: 184	Analytics & Data Management Tools page: 189	Enterprise Management Tools page: 205	Business Application Tools page: 225

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



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System, Storage & Data Platforms Market 2018-2026

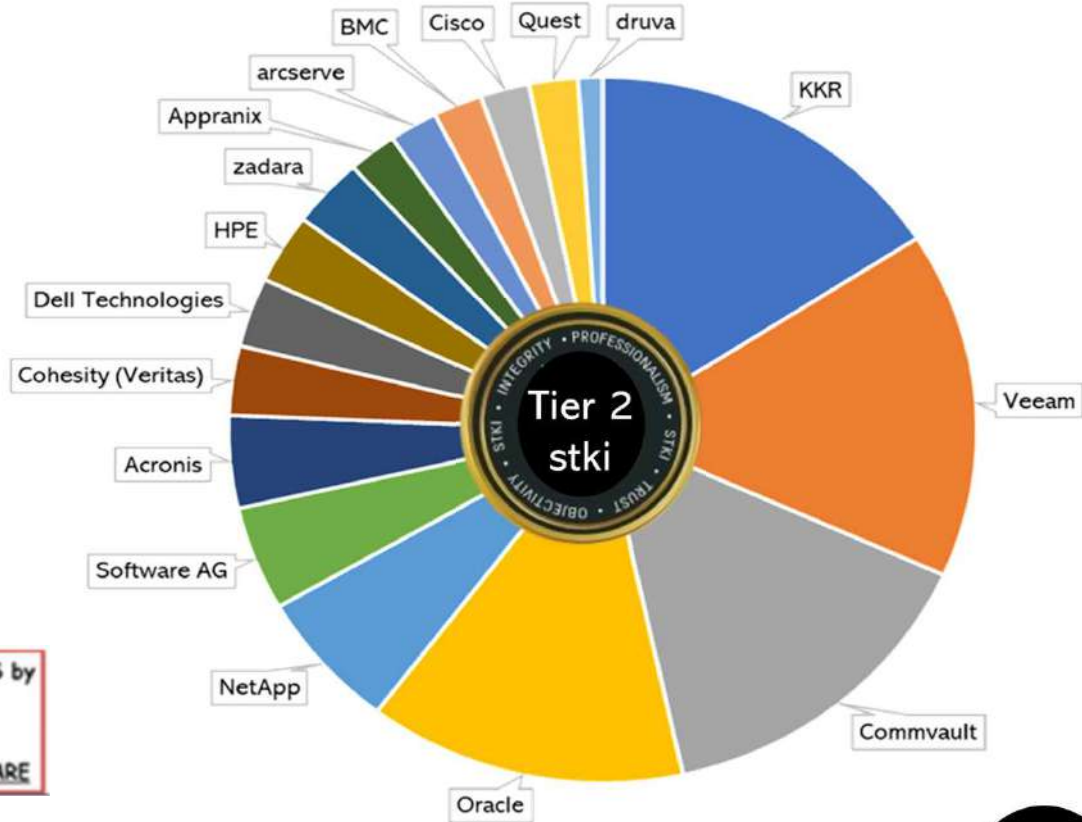
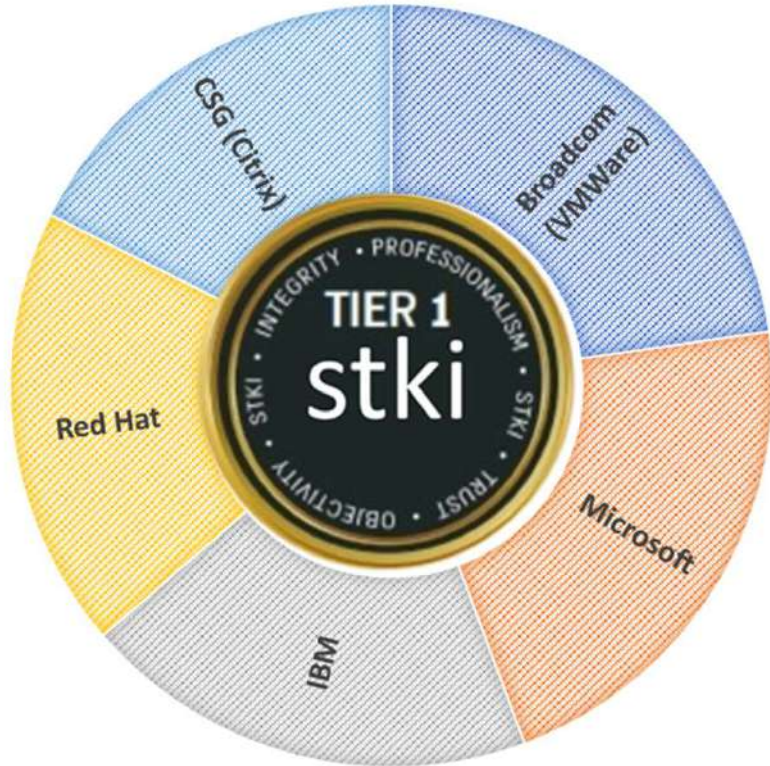
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Infrastructure & System Software (including storage software)	\$232.00	18.97%	\$276.00	6.88%	\$295.00	6.78%	\$315.00	-3.17%	\$305.00	-4.92%	\$290.00	6.90%	\$310.00	4.84%	\$325.00	-3.08%	\$315.00
data platforms (SQL, NoSQL dbms)	\$65.00	-3.08%	\$63.00	-4.76%	\$60.00	3.33%	\$62.00	4.84%	\$65.00	-7.69%	\$60.00	-8.33%	\$55.00	5.45%	\$58.00	6.90%	\$62.00
Cloud data platforms (SQL, NoSQL dbms)							\$10.00	50.00%	\$15.00	33.33%	\$20.00	50.00%	\$30.00	66.67%	\$50.00	30.00%	\$65.00
TOTALS	\$297.00	14.14%	\$339.00	4.72%	\$355.00	9.01%	\$387.00	-0.52%	\$385.00	-3.90%	\$370.00	6.76%	\$395.00	9.62%	\$433.00	2.08%	\$442.00

Values in Million USD



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Infrastructure & System (including storage) Software



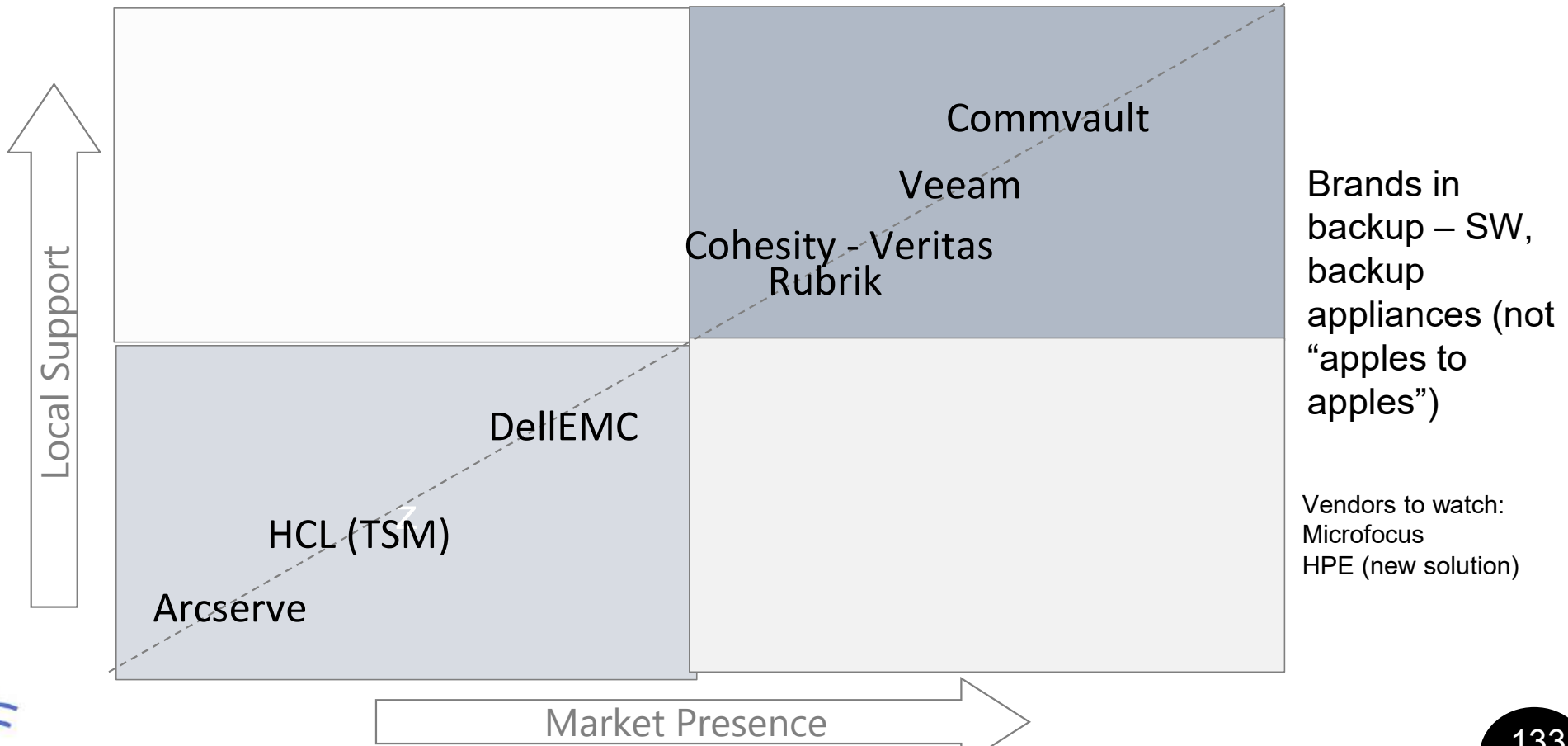
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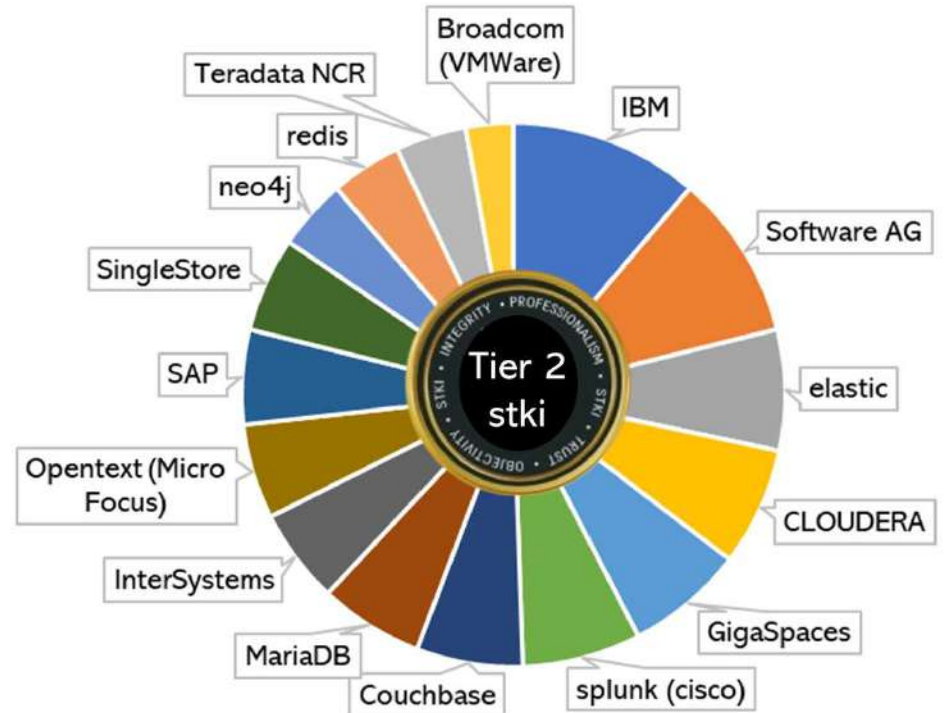
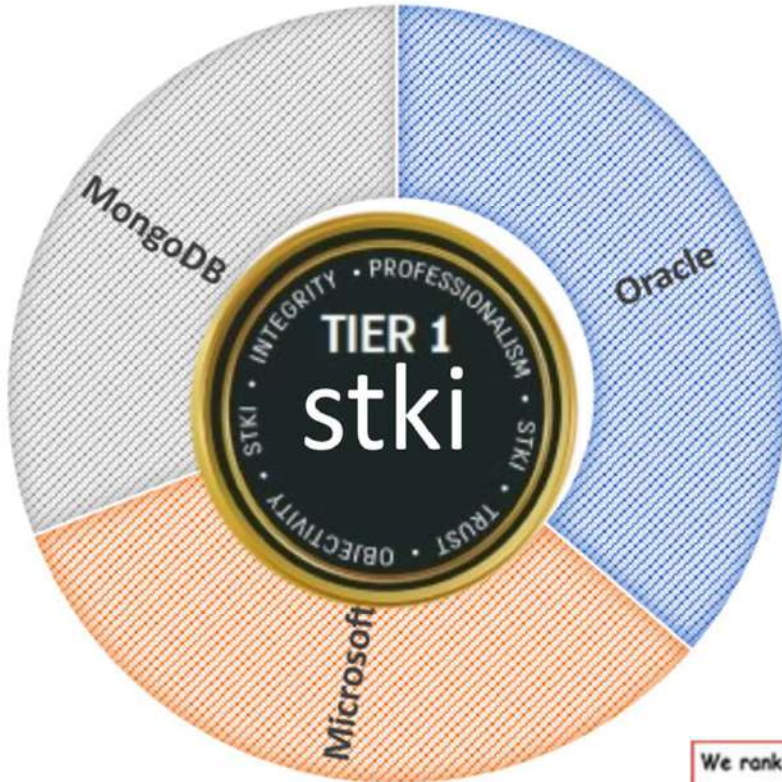


Israel enterprise backup market presence 2024



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Data Platforms (SQL, NoSQL, dbms)

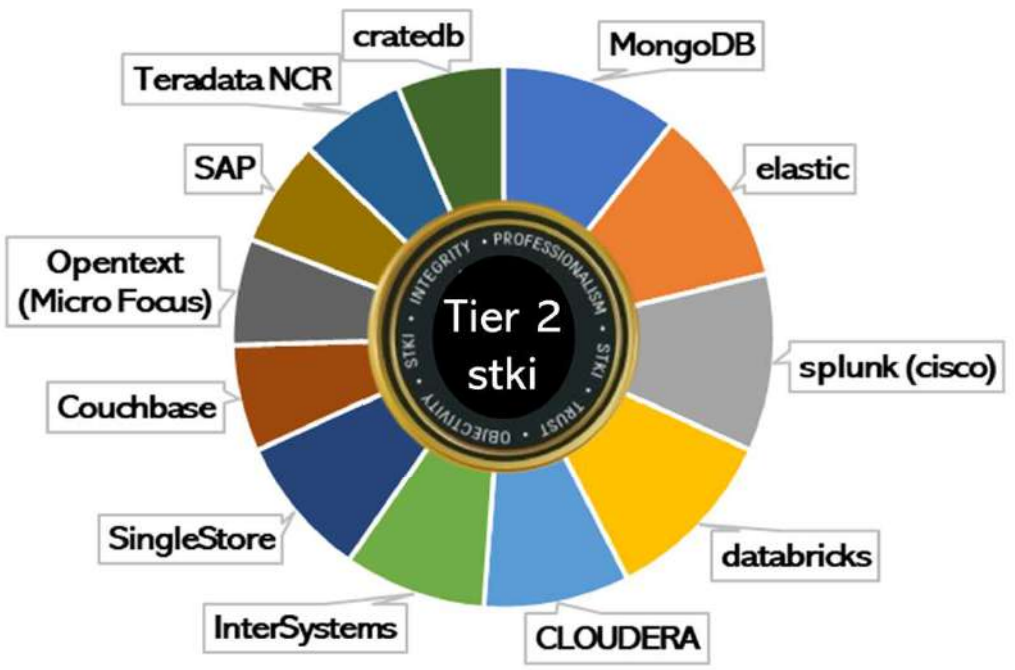


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Data Platforms (SQL, NoSQL, dbms) Cloud-based

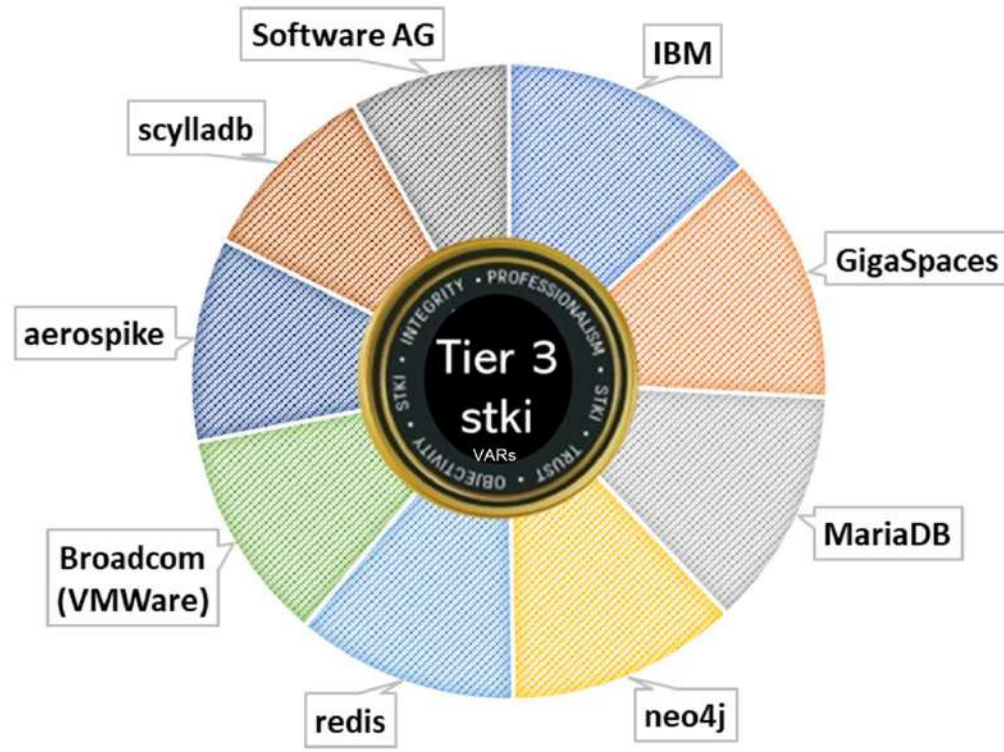


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Data Platforms (SQL, NoSQL, dbms) Cloud-based



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Middleware Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
App\WEB Server, Emulation, , BRMS APaaS (container platforms) Integration Streaming	\$58.50	2.56%	\$60.00	0.83%	\$60.50	4.13%	\$63.00	3.17%	\$65.00	-4.62%	\$62.00	12.90%	\$70.00	11.43%	\$78.00	8.97%	\$85.00
TOTALS	\$58.50	2.56%	\$60.00	0.83%	\$60.50	4.13%	\$63.00	3.17%	\$65.00	-4.62%	\$62.00	12.90%	\$70.00	11.43%	\$78.00	8.97%	\$85.00

Values in Million USD

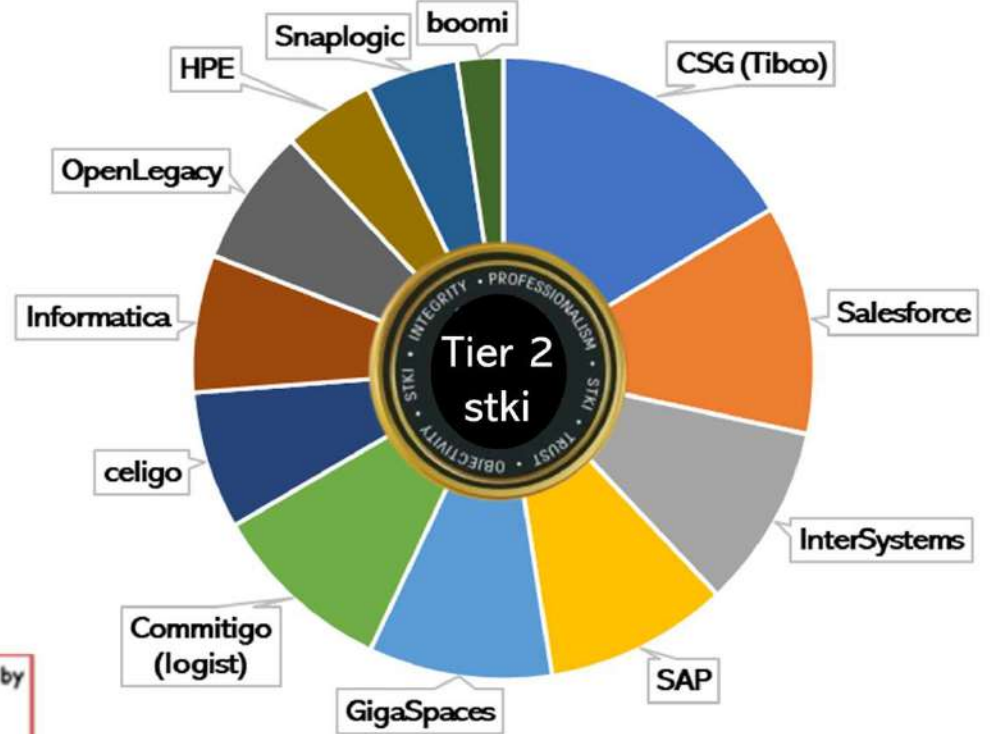
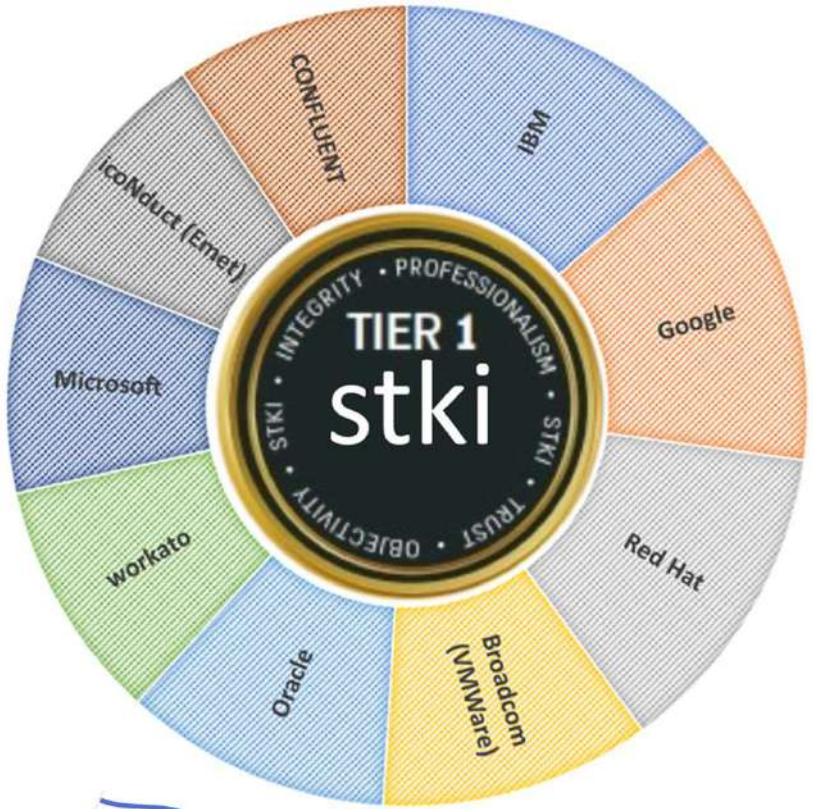


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software market

App\WEB Server, Emulation, , BRMS, APaaS, container platforms ,Integration Streaming VENDORS



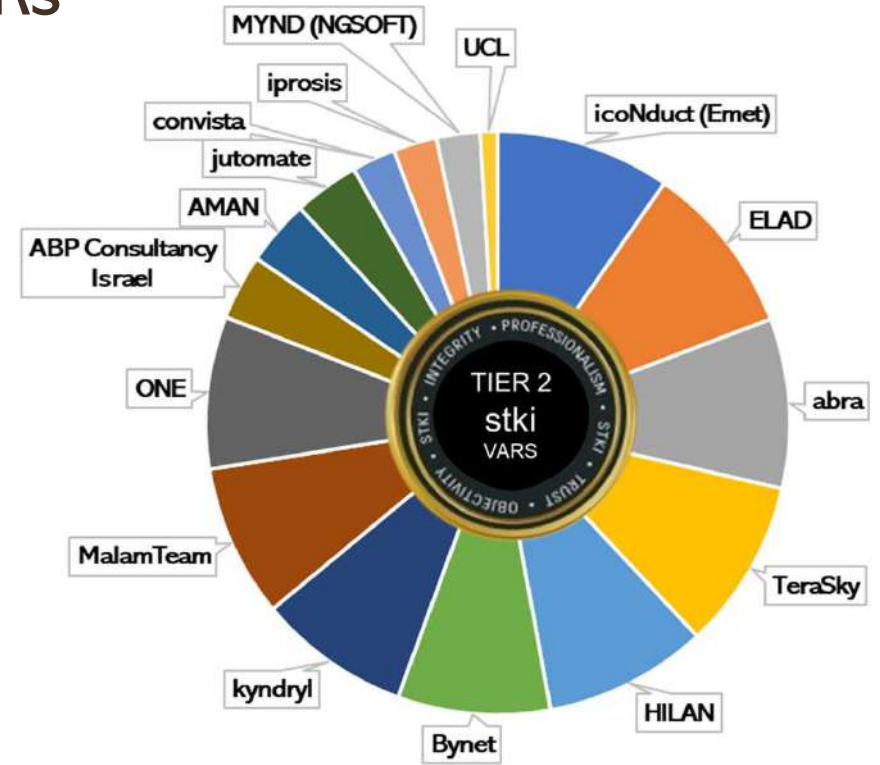
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App\WEB Server, Emulation, , BRMS, APaaS, container platforms ,Integration Streaming VARs



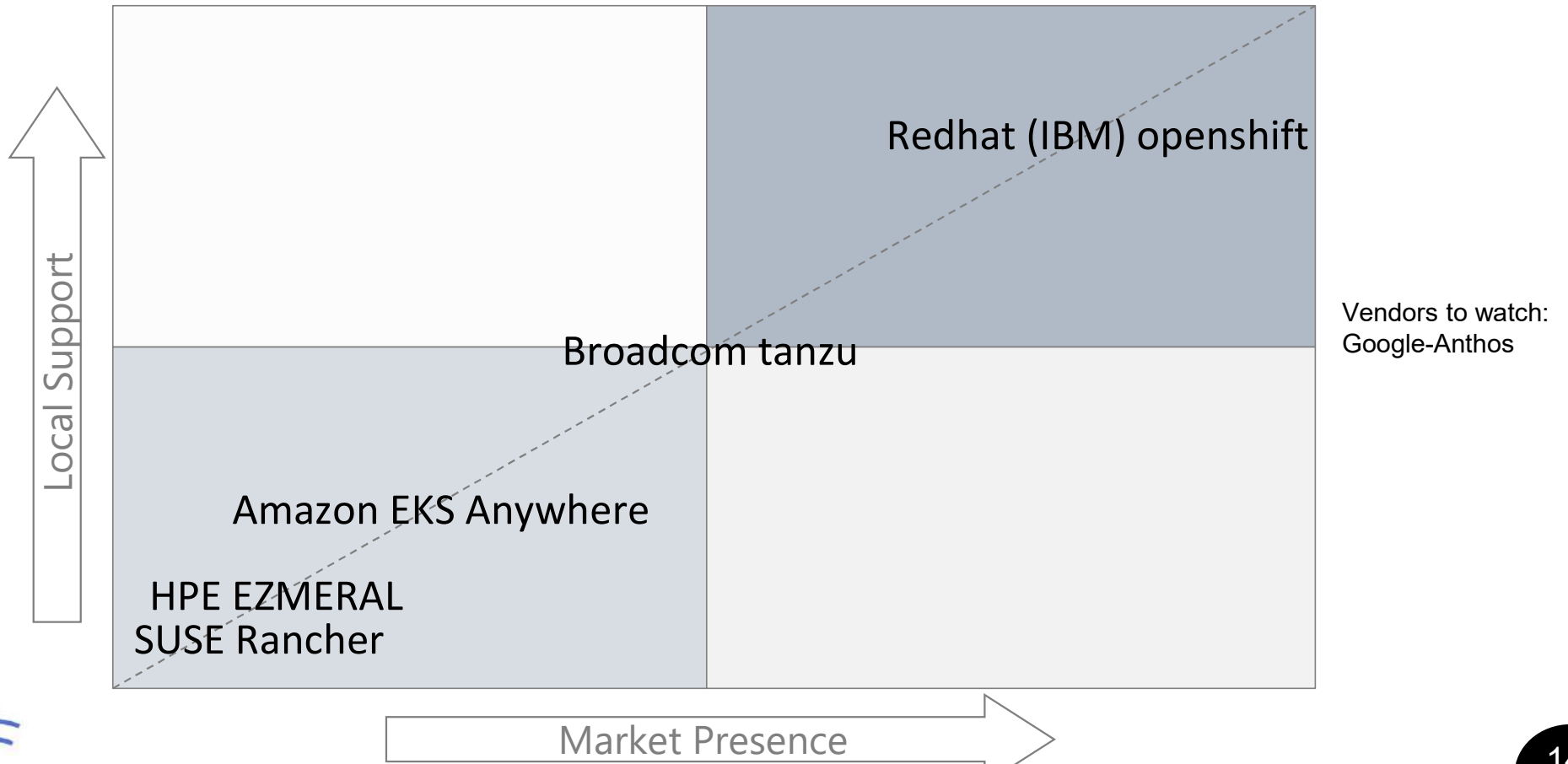
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Israel enterprise on premise (+cloud) container platform market presence 2024



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IT Management & Operations Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
IT Operations, Asset Management, APM, AIOps Monitoring, Workload-Scheduling ITSM, Service Desk	\$104.00	5.77%	\$110.00	-7.27%	\$102.00	-1.96%	\$100.00	7.00%	\$107.00	-6.54%	\$100.00	5.00%	\$105.00	4.76%	\$110.00	5.45%	\$116.00
FinOps tools									\$5.00	20.00%	\$6.00	33.33%	\$8.00	25.00%	\$10.00	40.00%	\$14.00
TOTALS	\$104.00	5.77%	\$110.00	-7.27%	\$102.00	-1.96%	\$100.00	12.00%	\$112.00	-5.36%	\$106.00	6.60%	\$113.00	6.19%	\$120.00	8.33%	\$130.00

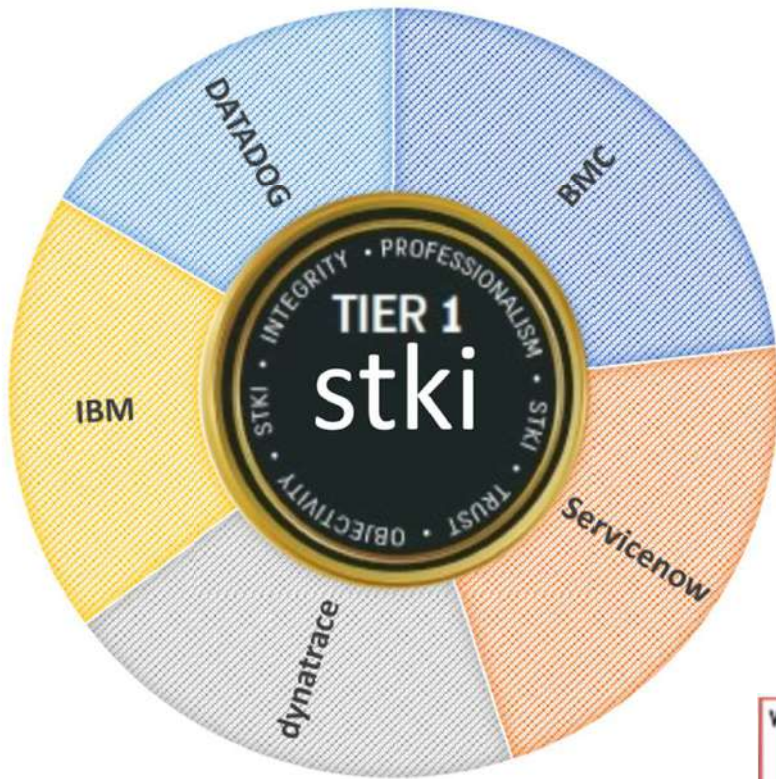
Values in Million USD



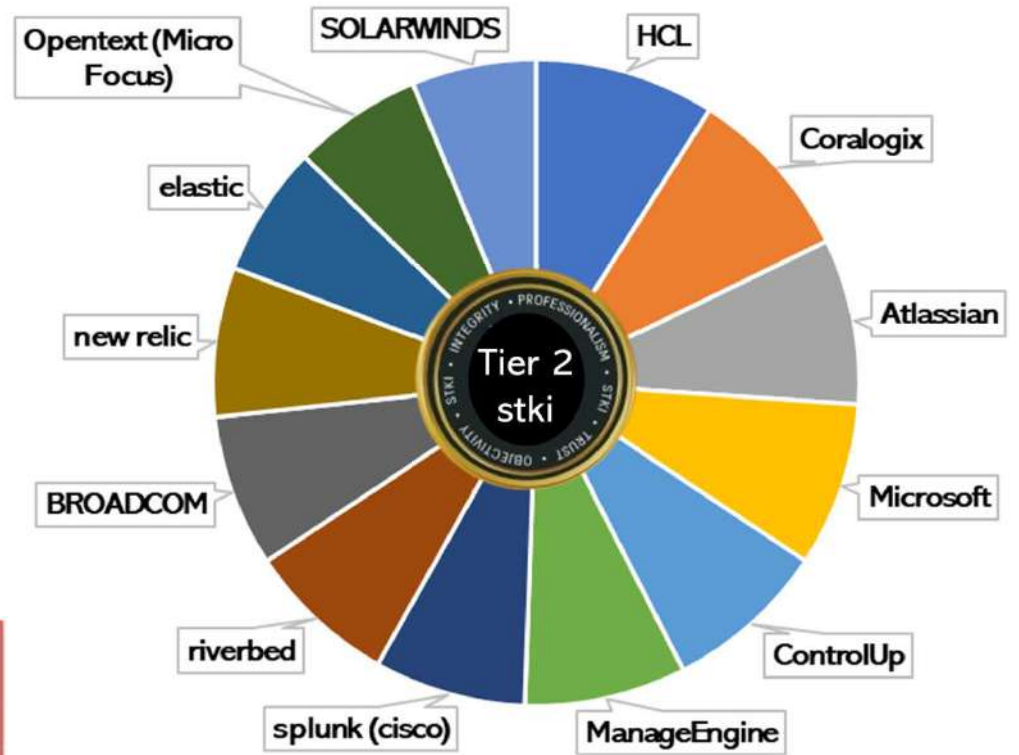
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IT Operations, Asset Management, APM, AIOps Monitoring, Workload-Scheduling ITSM, Service Desk VENDORS



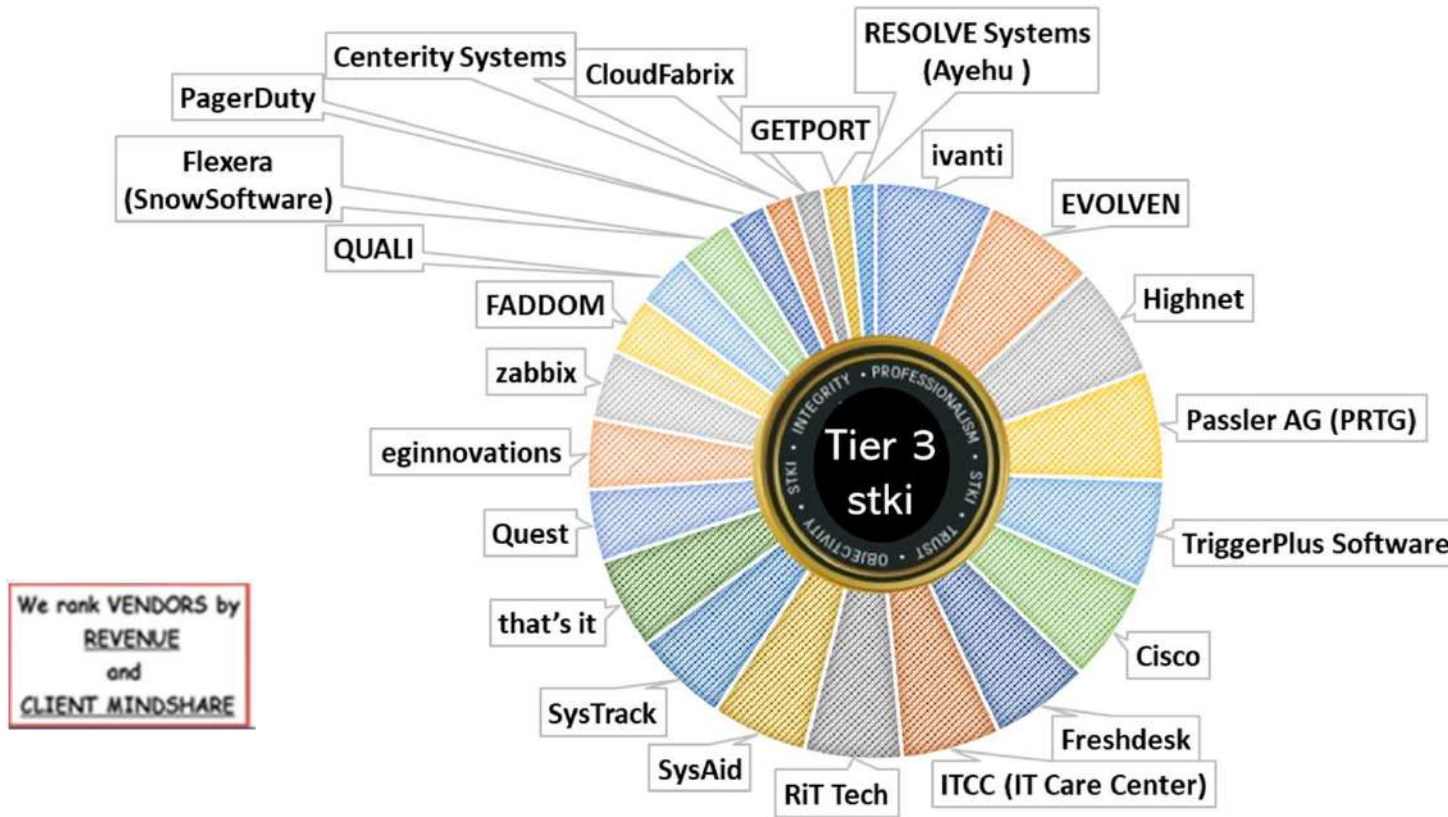
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IT Operations, Asset Management, APM, AIOps Monitoring, Workload-Scheduling ITSM, Service Desk VENDORS



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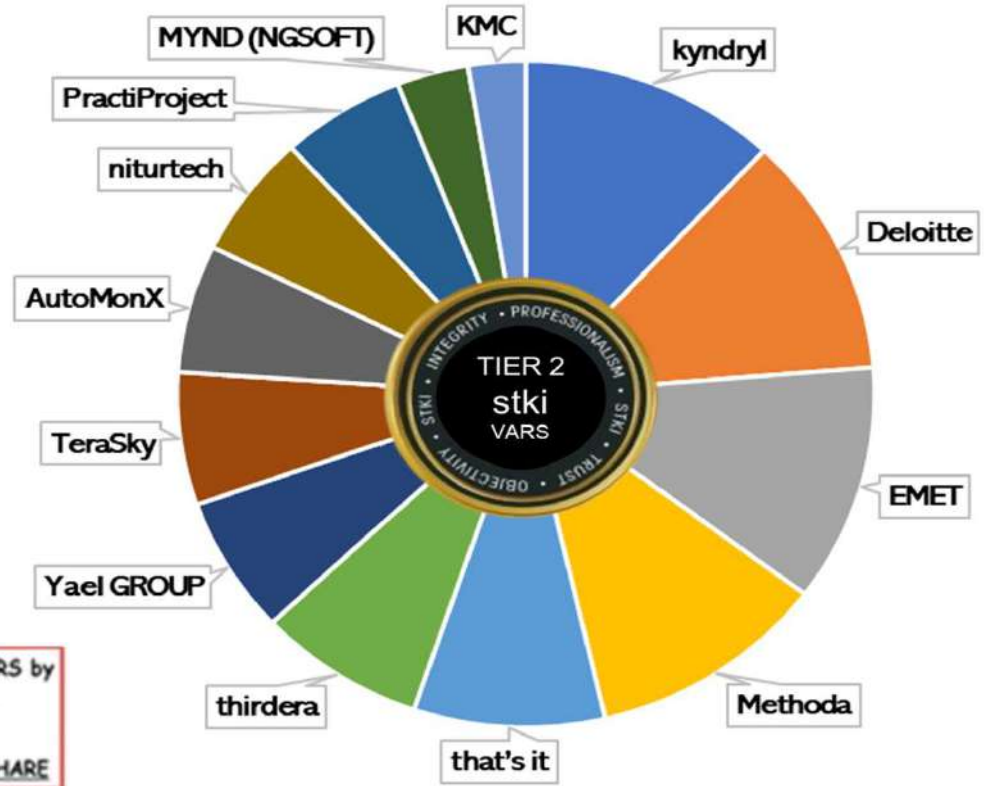
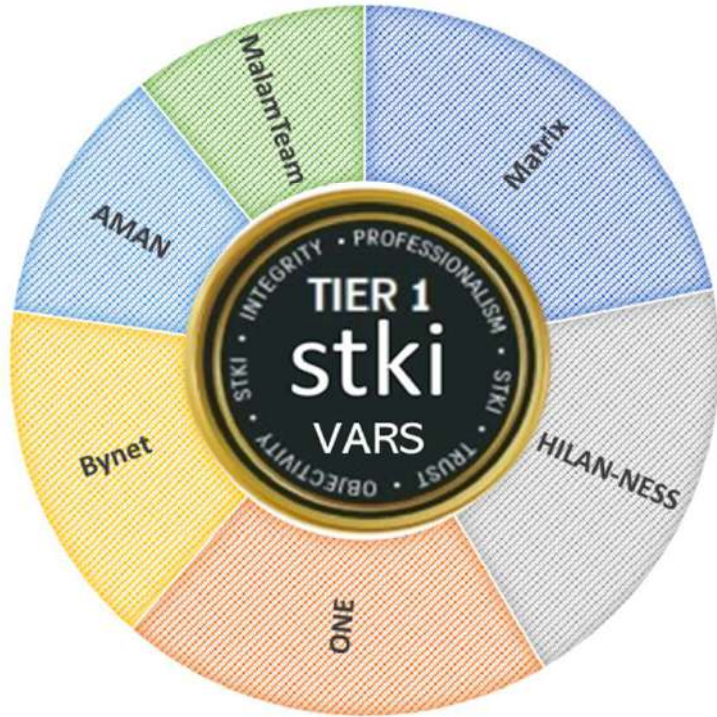


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IT Operations, Asset Management, APM, AIOps Monitoring, Workload-Scheduling ITSM, Service Desk

VARs



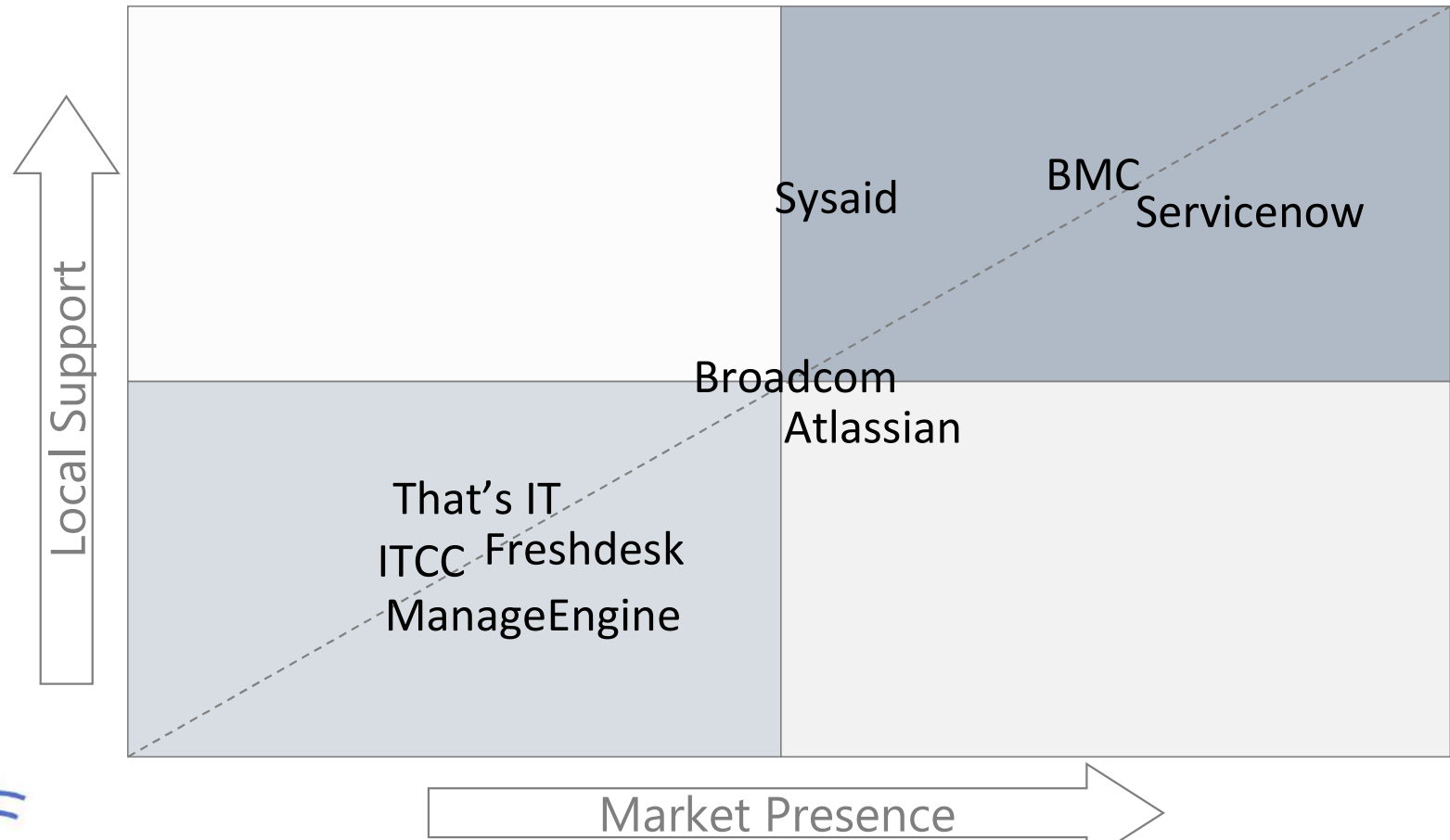
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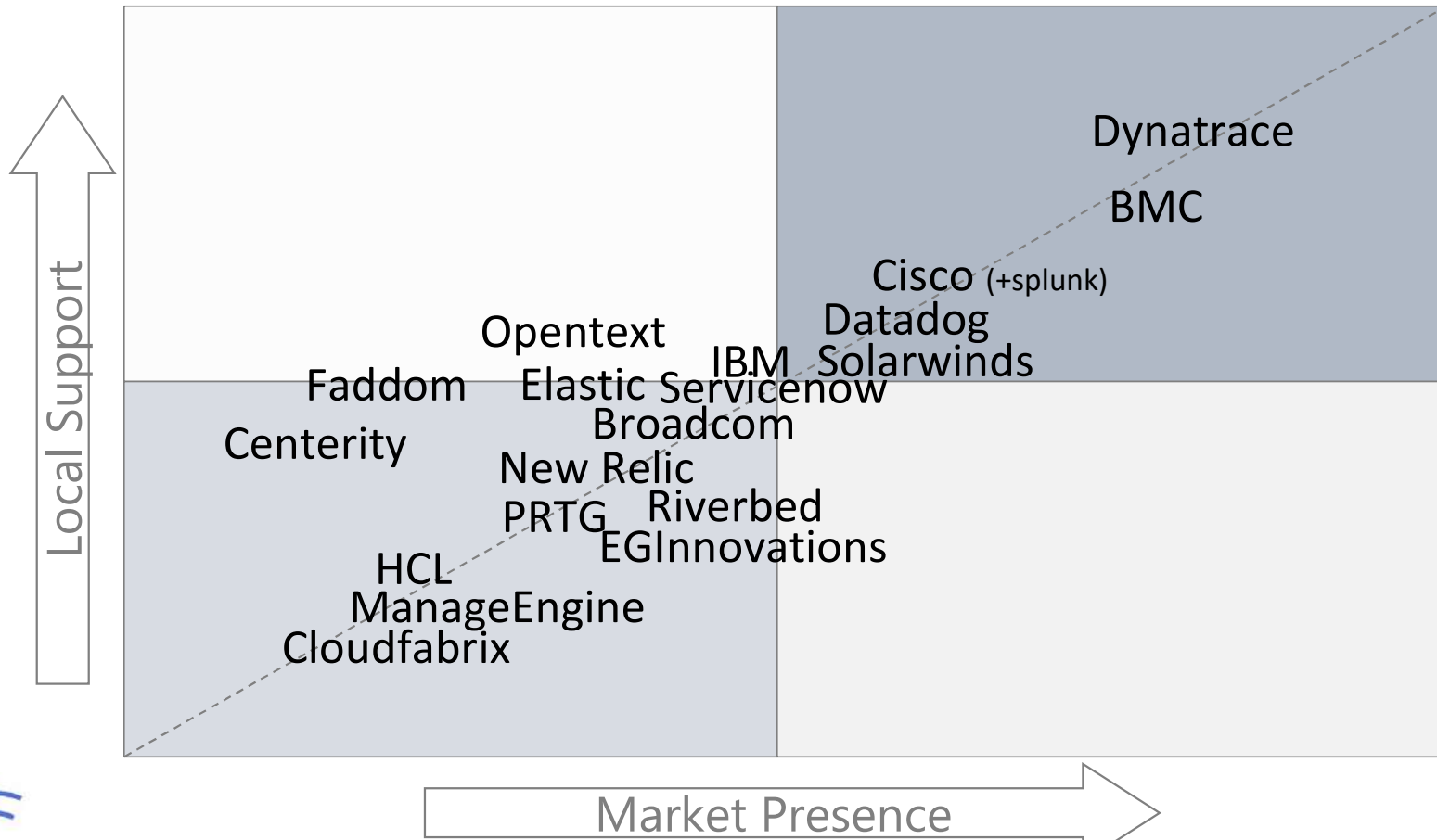
Israel ITSM (Help Desk Tools) market presence 2024



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Israel enterprise Observability (monitoring) market presence 2024



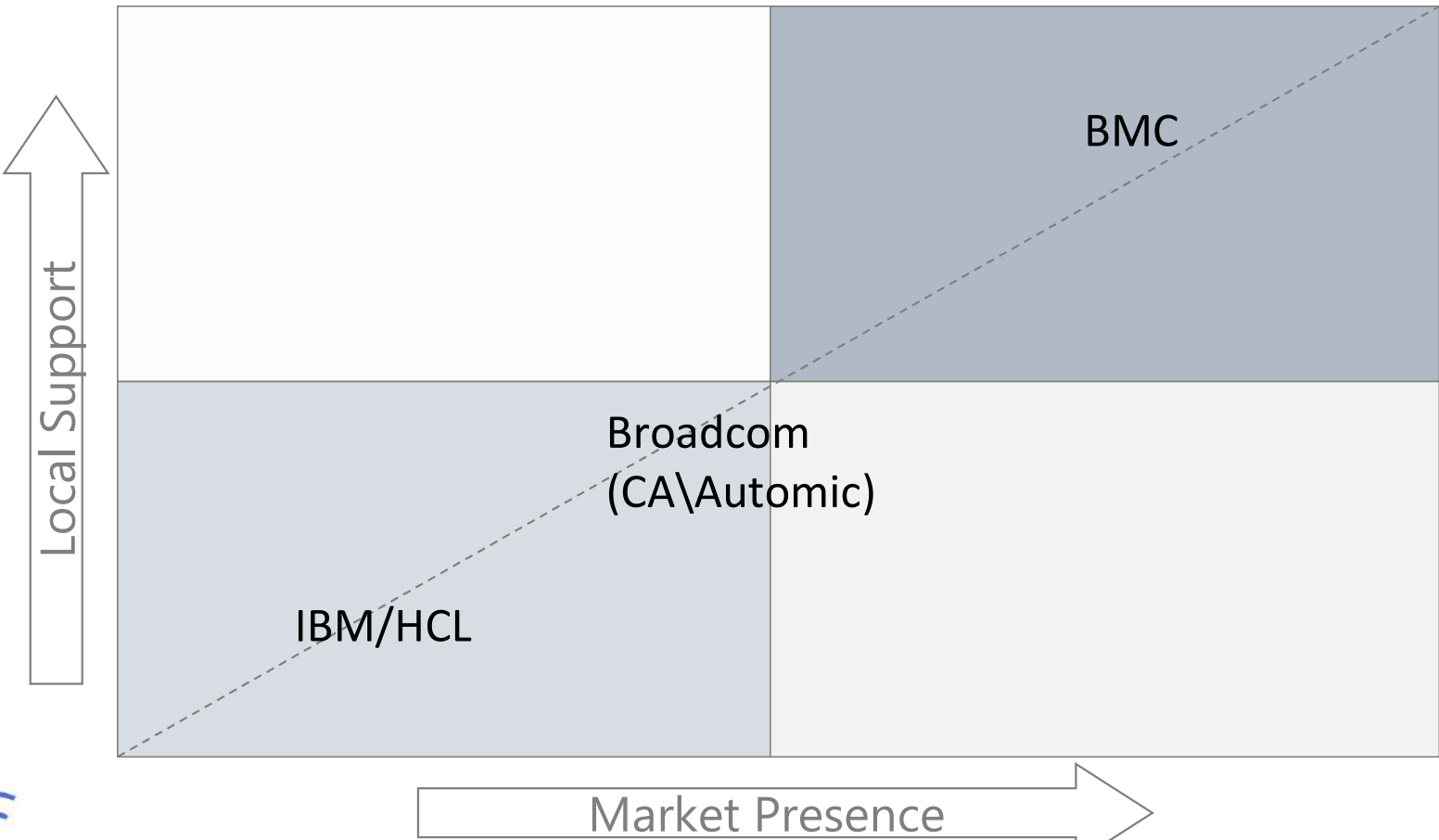
This diagram is not “apples to apples” comparison – it contains all kind of Observability types: infra (traditional), APM, AIOPS, MOM, Discovery, Cloud, etc.



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Israel enterprise job scheduling market presence 2024



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Israel enterprise job scheduling Selected Integrators

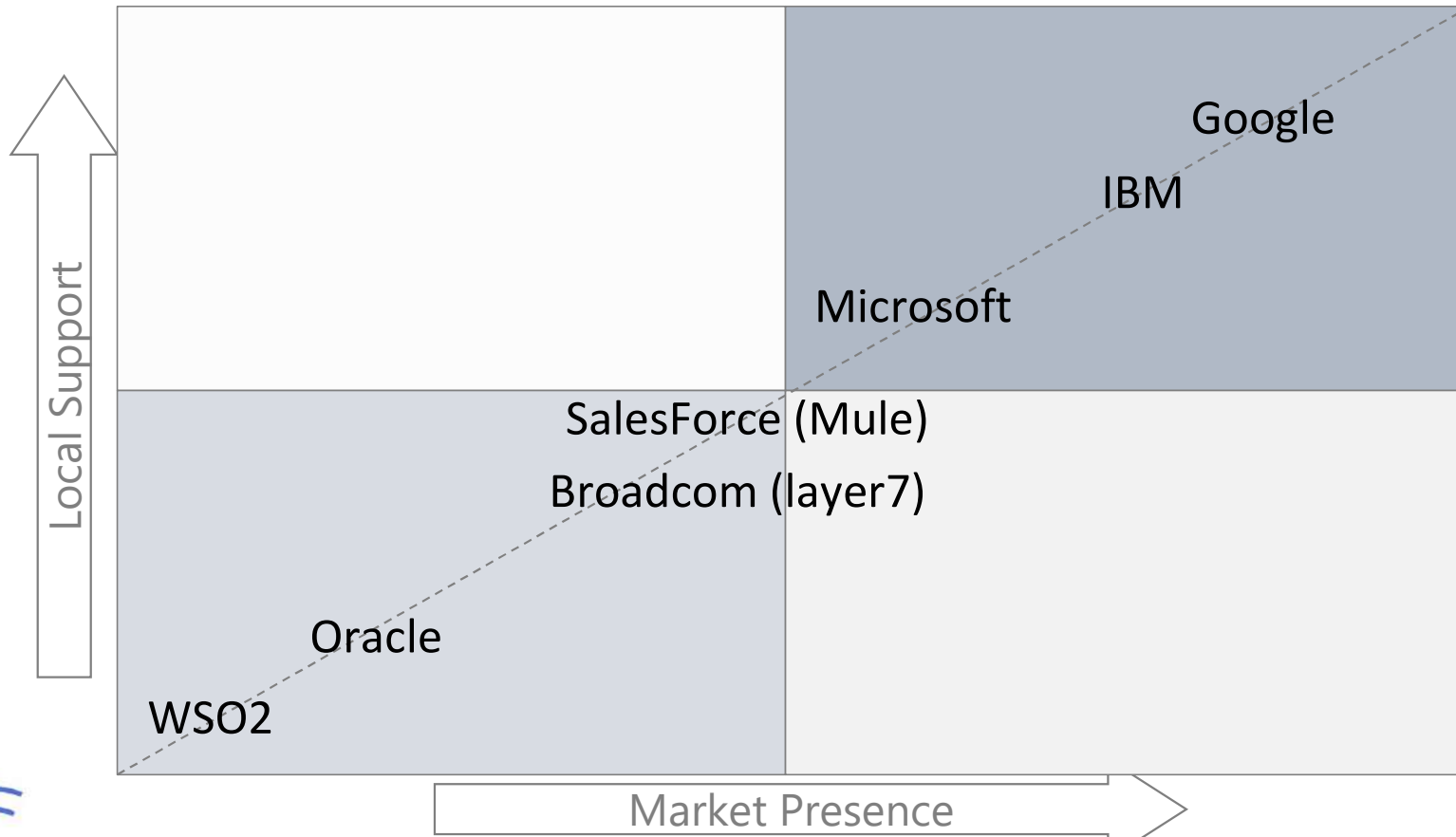
Vendor	Product	Israeli Rep.	Integrators
BMC	Control-M	BMC	Matrix
Broadcom	Automic	Broacdom Israel	Ness Pro
IBM/HCL	IBM/HCL workload manager	IBM	Matrix, Emet



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Brands in API Management (with on premise option) – market enterprise presence 2024




Vendors to watch:
Redhat (3scale)
Tyk
KONG



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Israeli API Management (with on premise option) selected integrators

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	



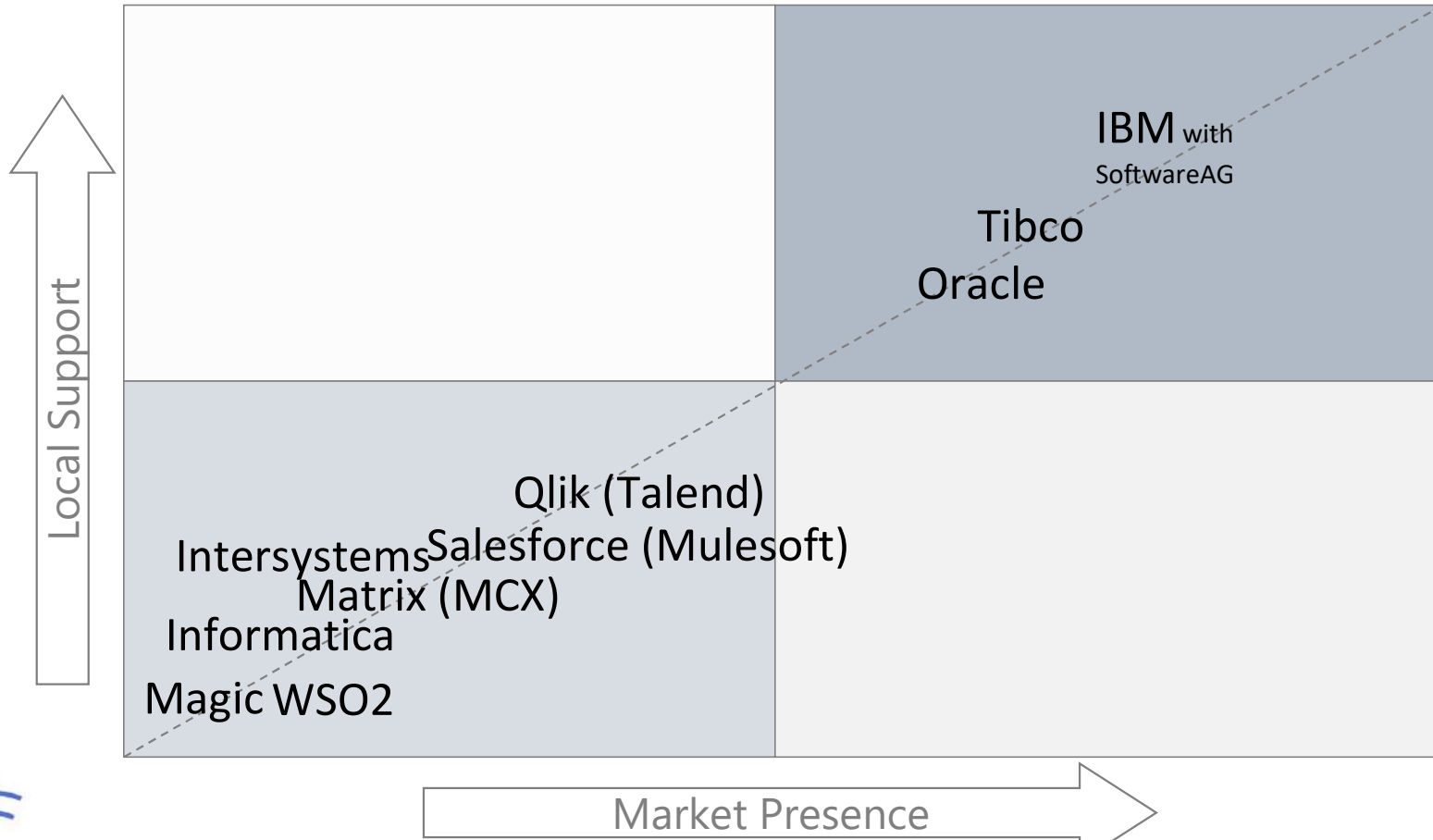
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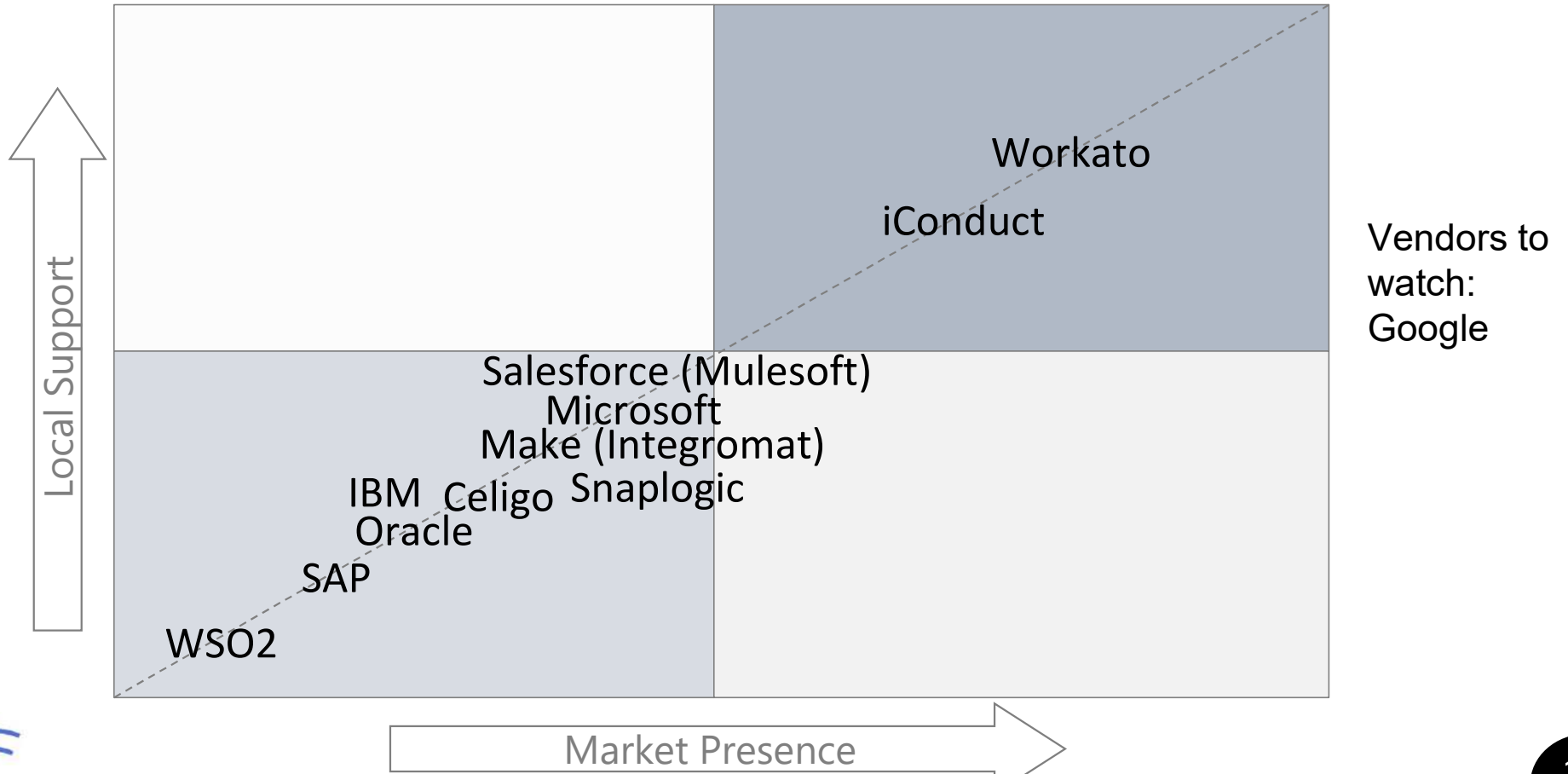
Brands in ESB - Israeli market presence 2024



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Brands in IPaaS - Israeli market enterprise presence 2024



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Israeli application integration selected integrators

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	Workato Israel	EladCRM, Deloitte Digital, Malam Team, Allcloud, Yael Group, Strauss Strategy
SoftwareAG	WebMethods	SoftwareAG Israel	One
Oracle	OSB	Oracle Israel	Malam One
Magic	XPI	Magic Israel	Malam
WSO2	WSO2 Enterprise Integrator		Matrix



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Integrators in application integration / Cont.

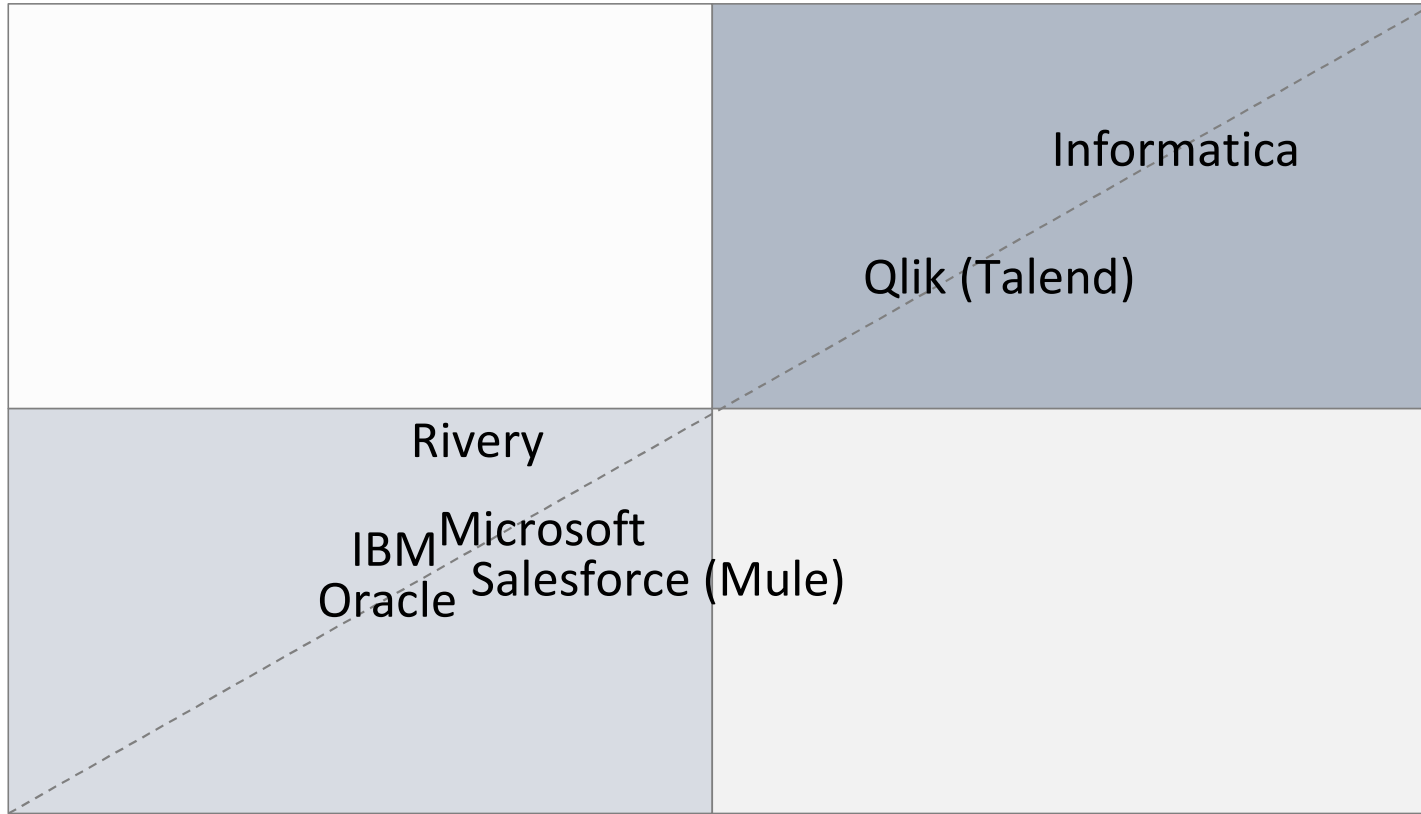
Vendor	Product	Israeli Rep.	Integrators
OpenLegacy	OpenLegacy	OpenLegacy	Ness
Talend Qlik	Talend Integration		Qlik Israel
Informatica	Informatica PowerCenter		Aman
Celigo	Integrator.io		SangIT
Snaplogic	Snaplogic IPAAS		One



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Brands in ETL (Extract Transform Load)- market enterprise presence 2024



Vendors to watch:
 Equalum
 bigbi.io
 Snaplogic

Not including
 CDC



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Israeli ETL selected integrators

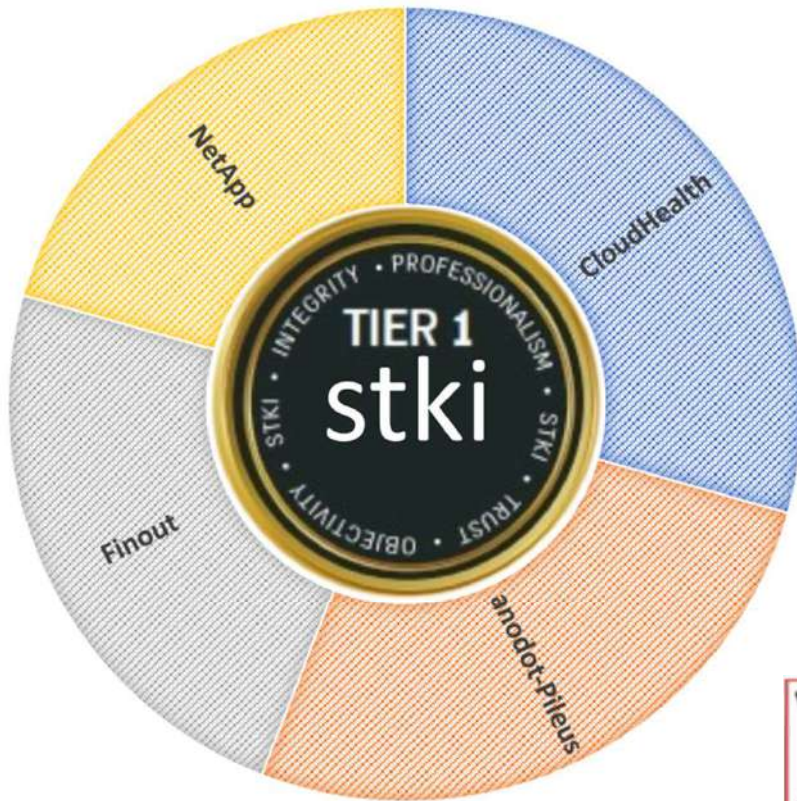
Vendor	Product	Israeli Rep.	Integrators
Informatica	Informatica	Informatica Israel	Aman Matrix
Talend	Talend Integration		Smartstreams YaelSoft QLIK
Rivery	Rivery ETL	Twingo	
IBM	Datastage	IBM Israel	Malam, IBM, YaelSoft and more
Bigbi.io	bigbi.io		SQLINK
Snaplogic	Snaplogic		One



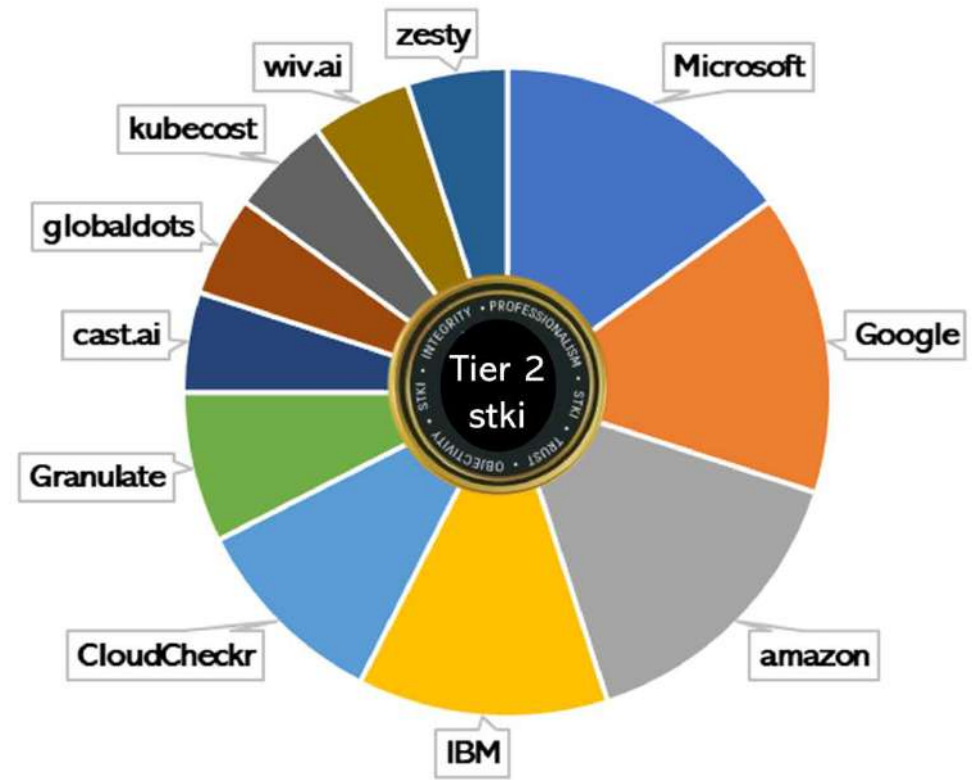
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FinOps Tools



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STKI IT knowledge Integrators
Company Confidential



Security (Cyber) Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Endpoint related tools	\$43.50	5.75%	\$46.00	15.22%	\$53.00	3.77%	\$55.00	3.64%	\$57.00	3.51%	\$59.00	5.08%	\$62.00	9.68%	\$68.00	7.35%	\$73.00
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	3.03%	\$102.00	3.92%	\$106.00	3.77%	\$110.00	3.64%	\$114.00
data content related tools (DLP, DB FW, DLP Halbana, etc.)	\$32.50	10.77%	\$36.00	2.78%	\$37.00	5.41%	\$39.00	5.13%	\$41.00	4.88%	\$43.00	6.98%	\$46.00	6.52%	\$49.00	6.12%	\$52.00
cyber management tools (SIEM tool, Incident responds, automation)	\$33.00	6.06%	\$35.00	2.86%	\$36.00	2.78%	\$37.00	5.41%	\$39.00	6.41%	\$41.50	13.25%	\$47.00	14.89%	\$54.00	11.11%	\$60.00
Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access service edge) IDM, Access	\$20.00	5.00%	\$21.00	4.76%	\$22.00	4.55%	\$23.00	8.70%	\$25.00	8.00%	\$27.00	11.11%	\$30.00	13.33%	\$34.00	11.76%	\$38.00
Cloud security protection tools (CNAPP CSPM CASB)									\$22.00	13.64%	\$25.00	12.00%	\$28.00	14.29%	\$32.00	12.50%	\$36.00
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	3.85%	\$13.50	3.70%	\$14.00	7.14%	\$15.00	13.33%	\$17.00
TOTALS	\$215.00	6.51%	\$229.00	8.30%	\$248.00	4.23%	\$258.50	14.51%	\$296.00	5.07%	\$311.00	7.07%	\$333.00	8.71%	\$362.00	7.73%	\$390.00

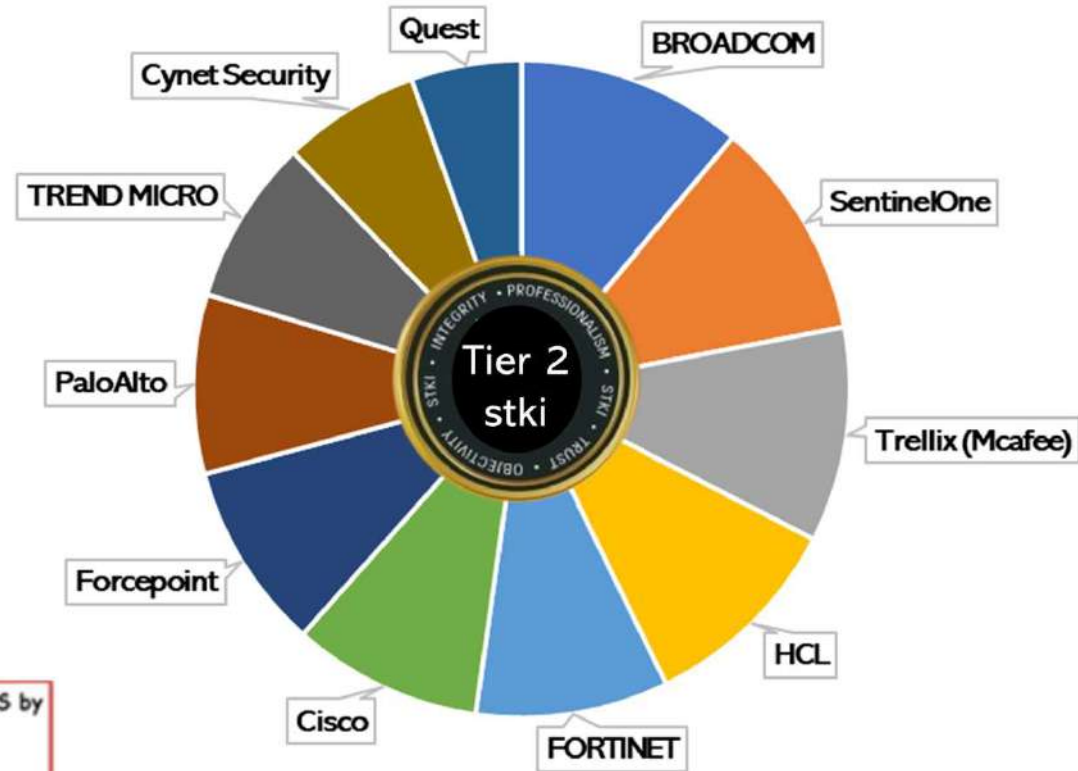
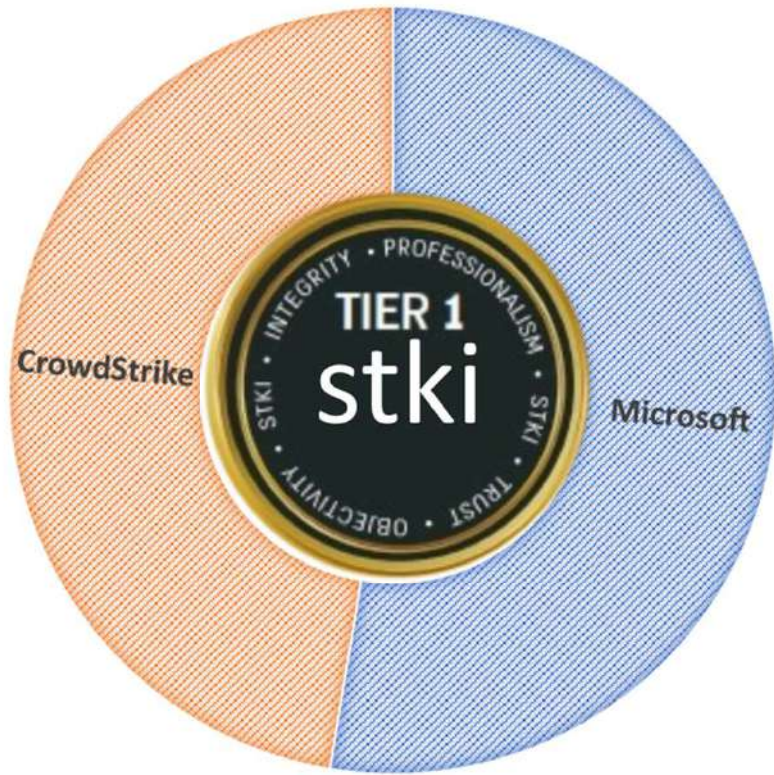


Values in Million USD

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Endpoint related tools



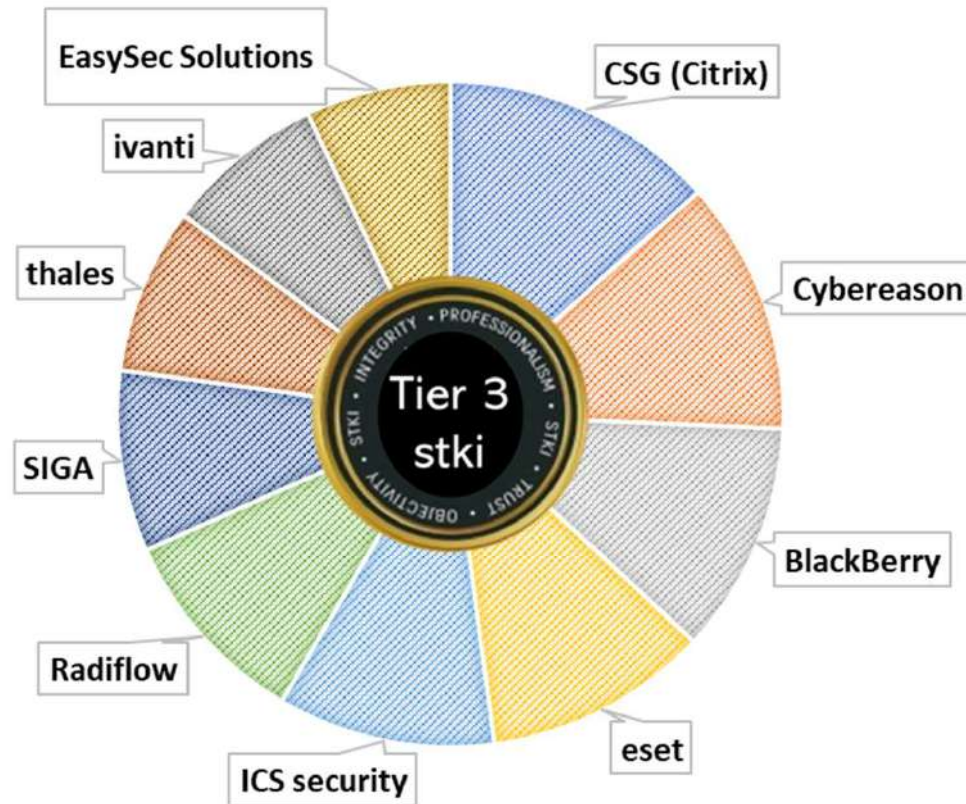
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Endpoint related tools



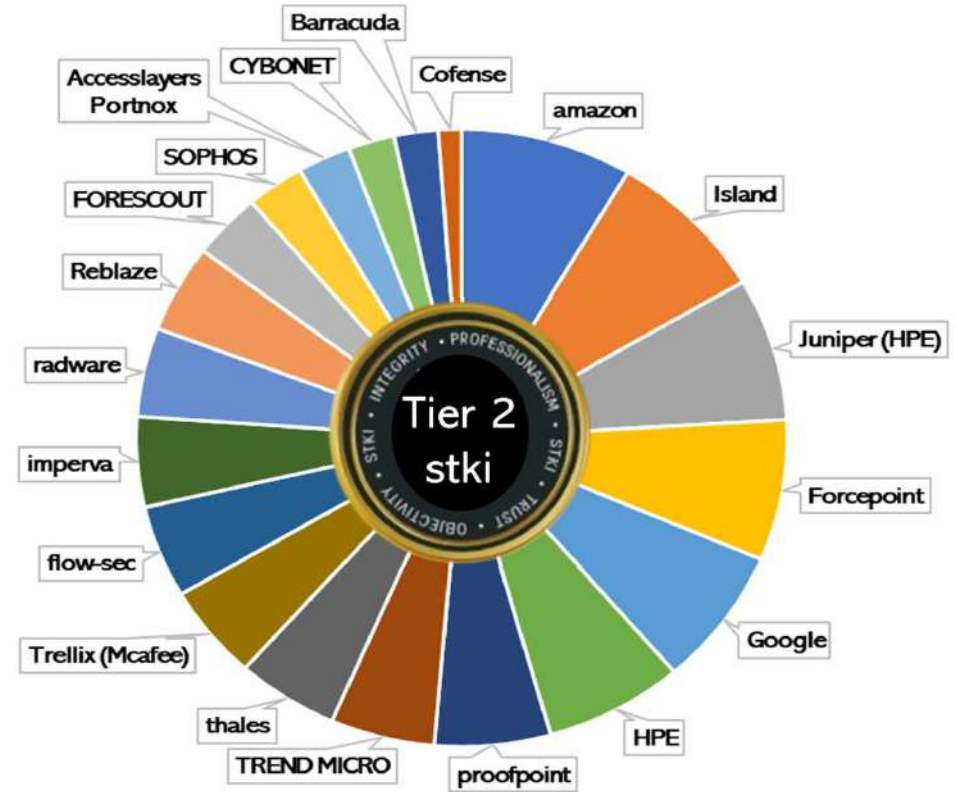
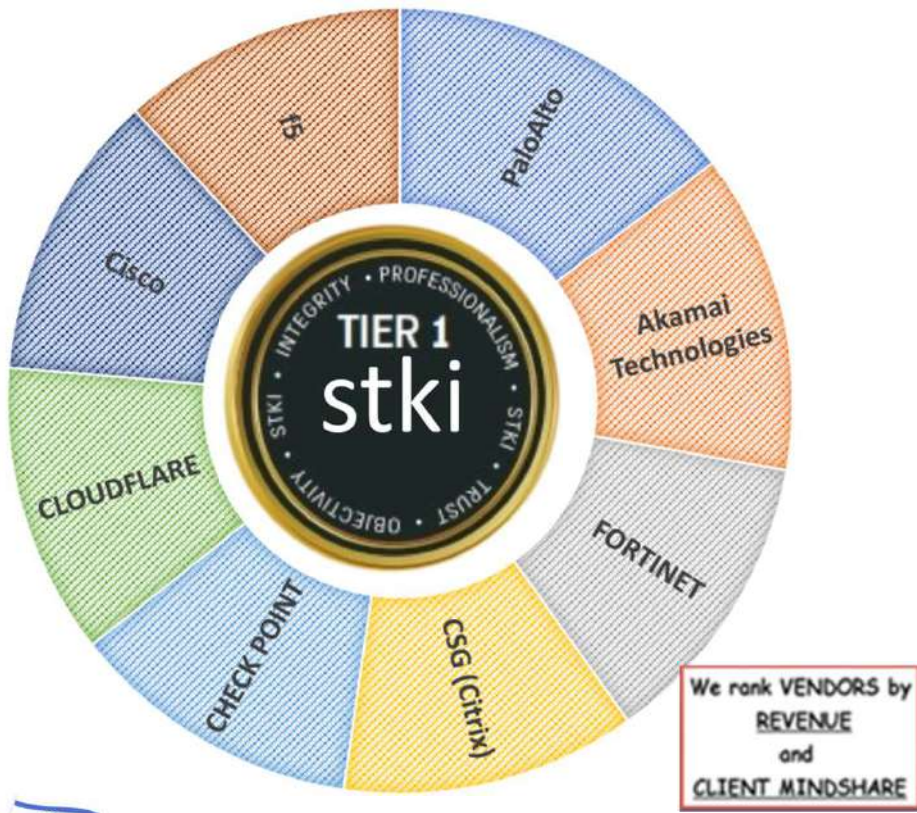
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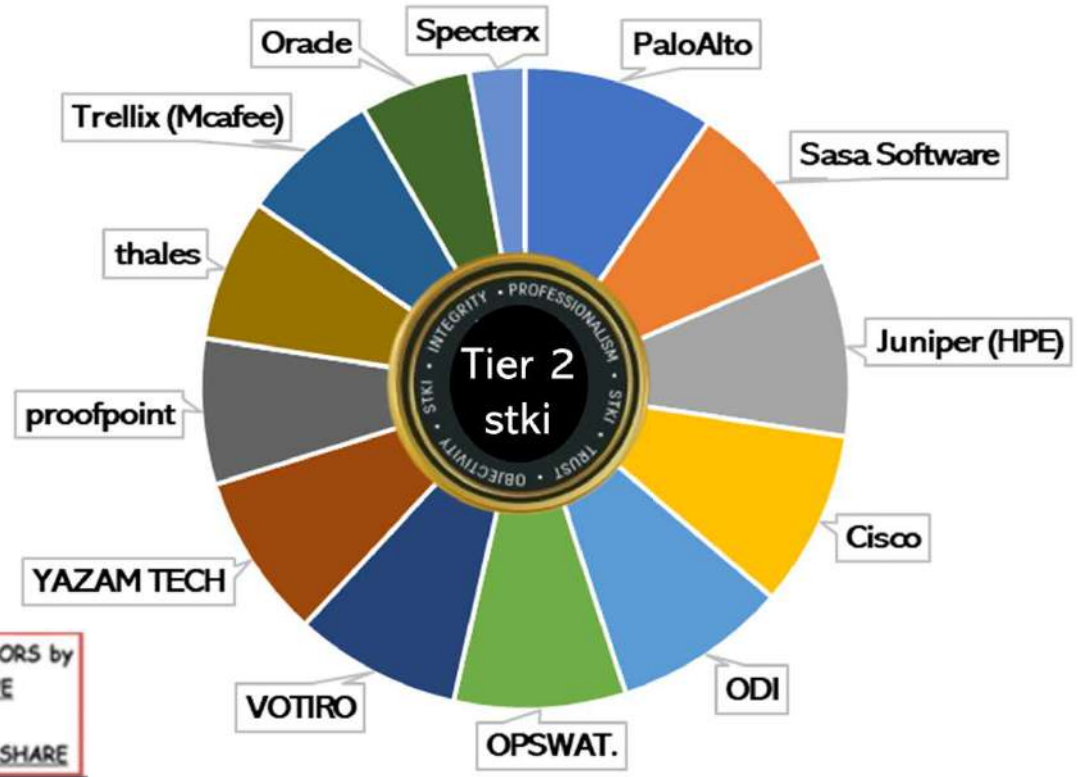
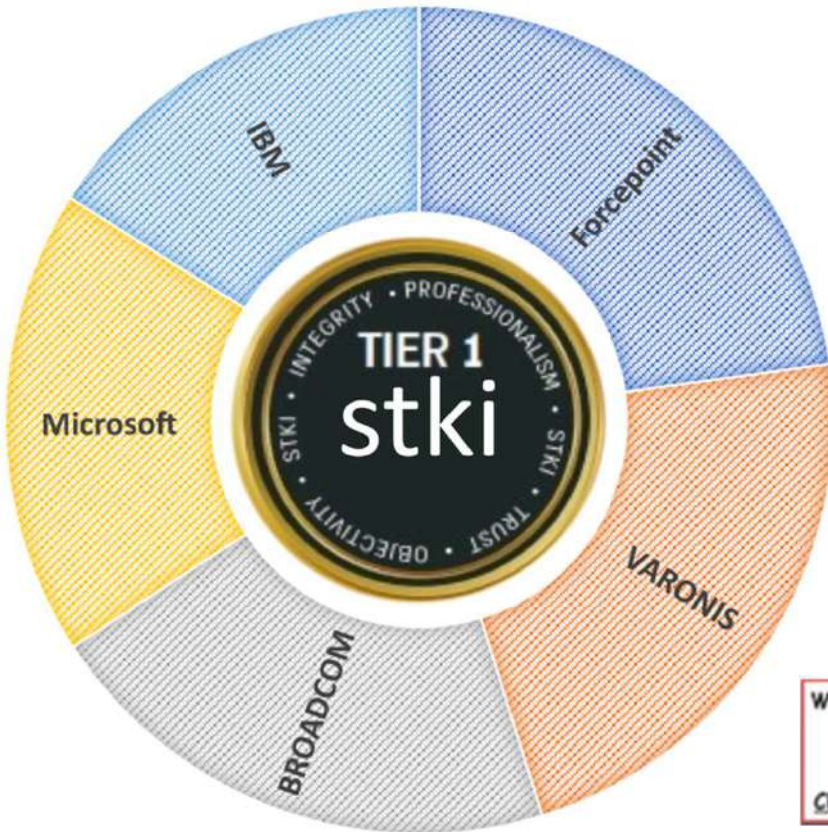


Network\Web cloud services (FW, WAF, DDOS services , etc.)



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

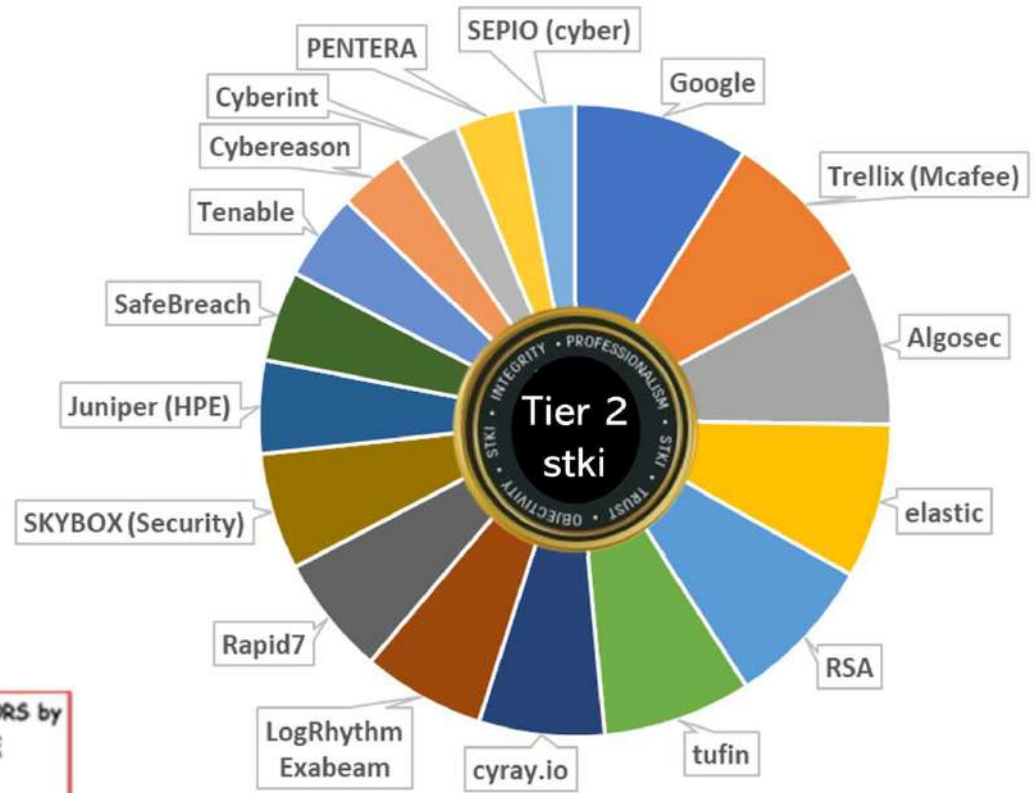


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Cyber Management Tools (SIEM tools, incident responds, automation)

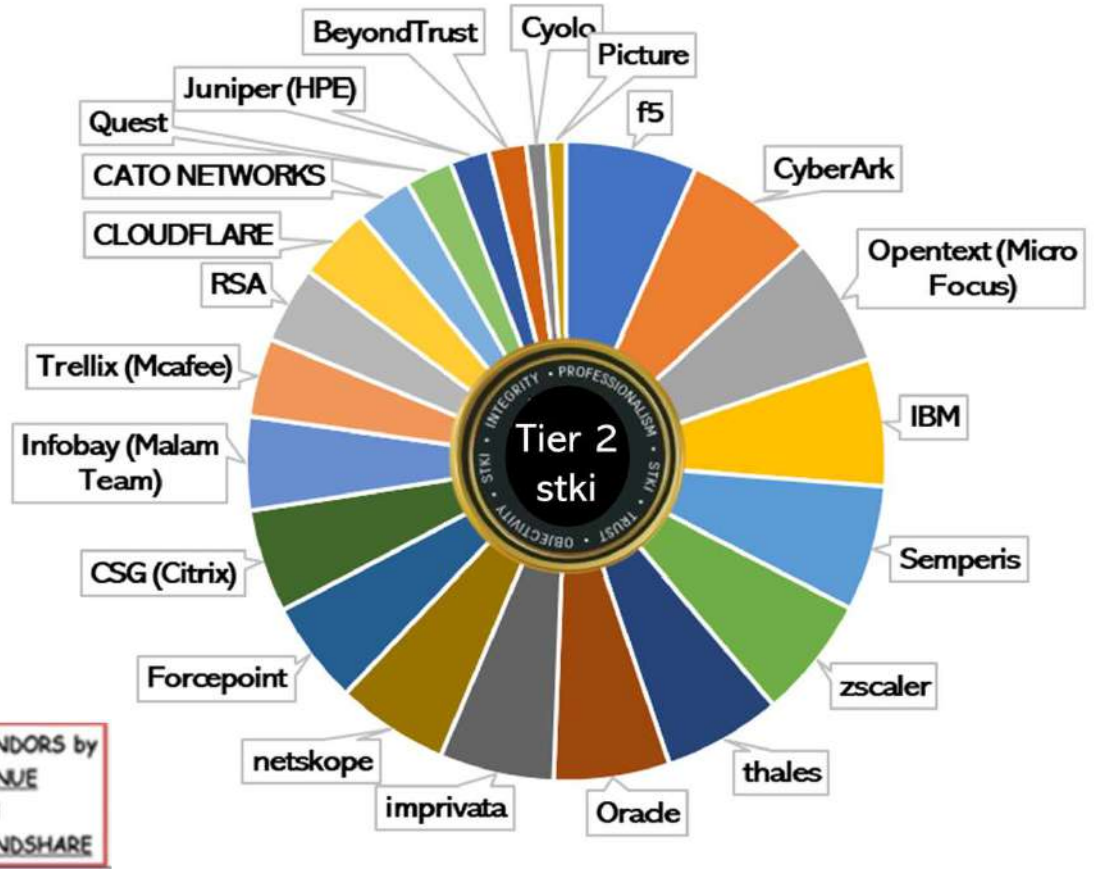


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Zero Trust including identity, SDP software defined perimeter, SASE (secure access service edge) IDM, Access



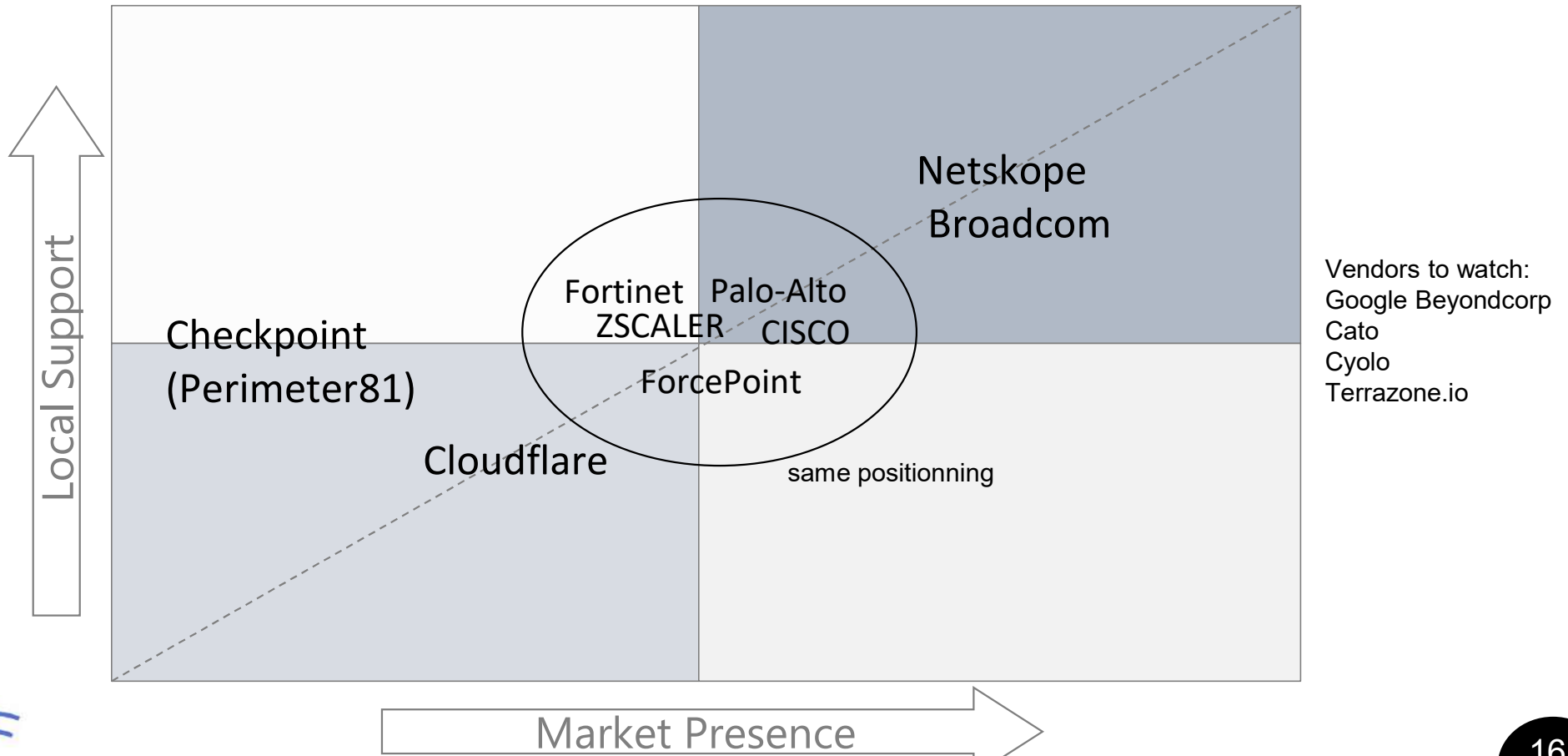
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Israel SASE for enterprises - market presence 2024



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SASE Selected Integrators-providers in Israel

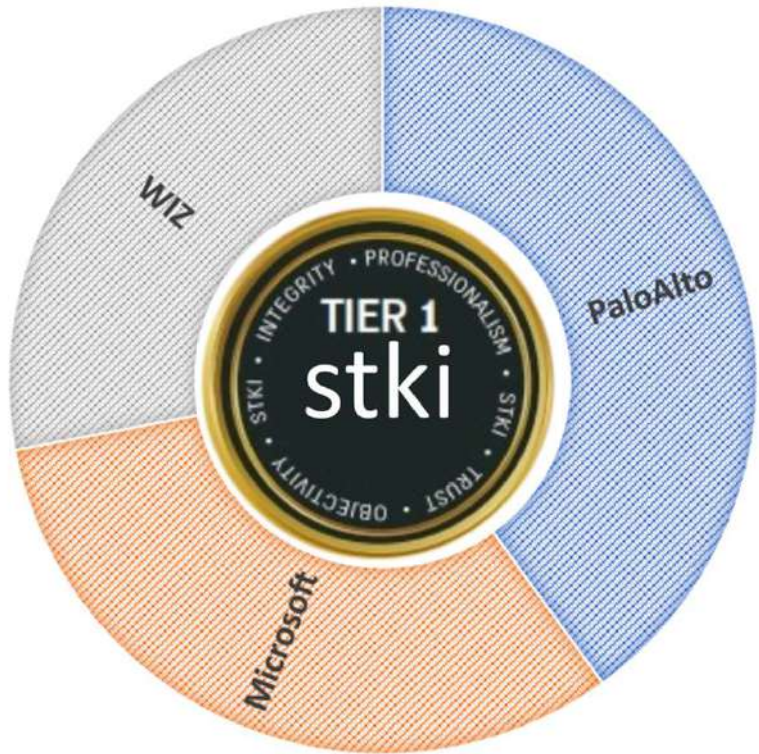
Vendor	Product	Integrators
Netskope	Security Service Edge	One Spider, Qmasters, Trustnet, 2B, Danet
Palo Alto	Prisma Access	(lots)
Cloudflare	Cloudflare's SSE & SASE Platform	Matrix
Zscaler	Zscaler SASE	Internet-Bynet We-Ankor
Checkpoint	Perimeter81	(lots)
Broadcom	Luminate	Ness
Fortinet	FortiSASE	YouCC
Forcepoint	Forcepoint SSE	Bulwarx Trustnet Spider Malam



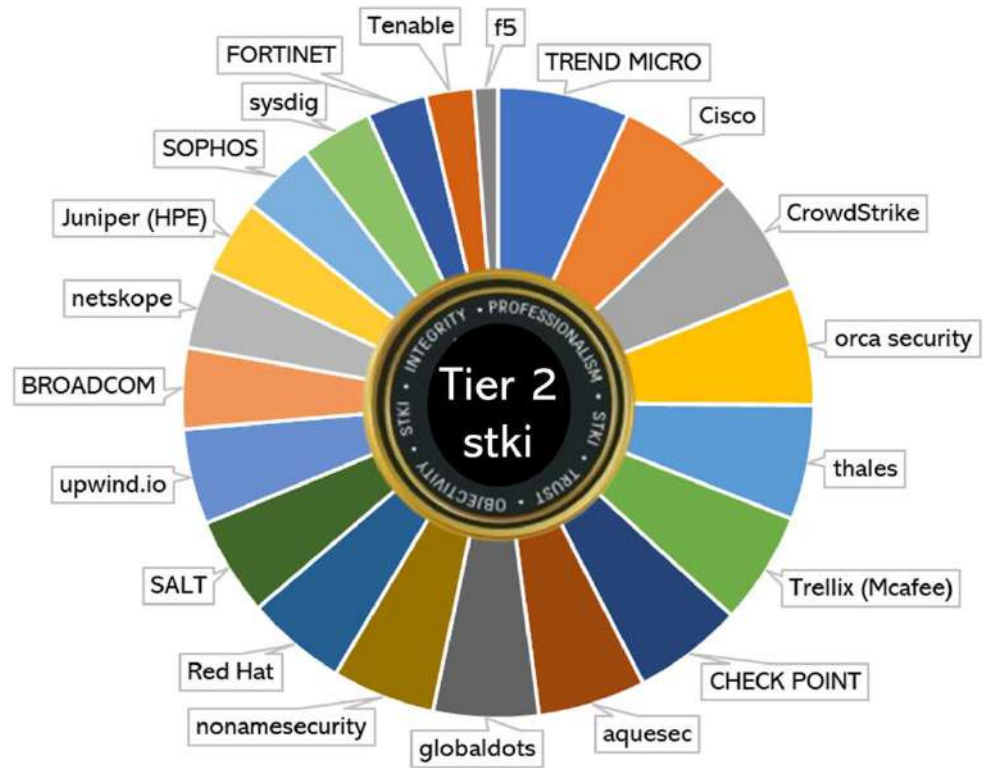
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Cloud security protection tools (CNAPP, CSPM, CASB)



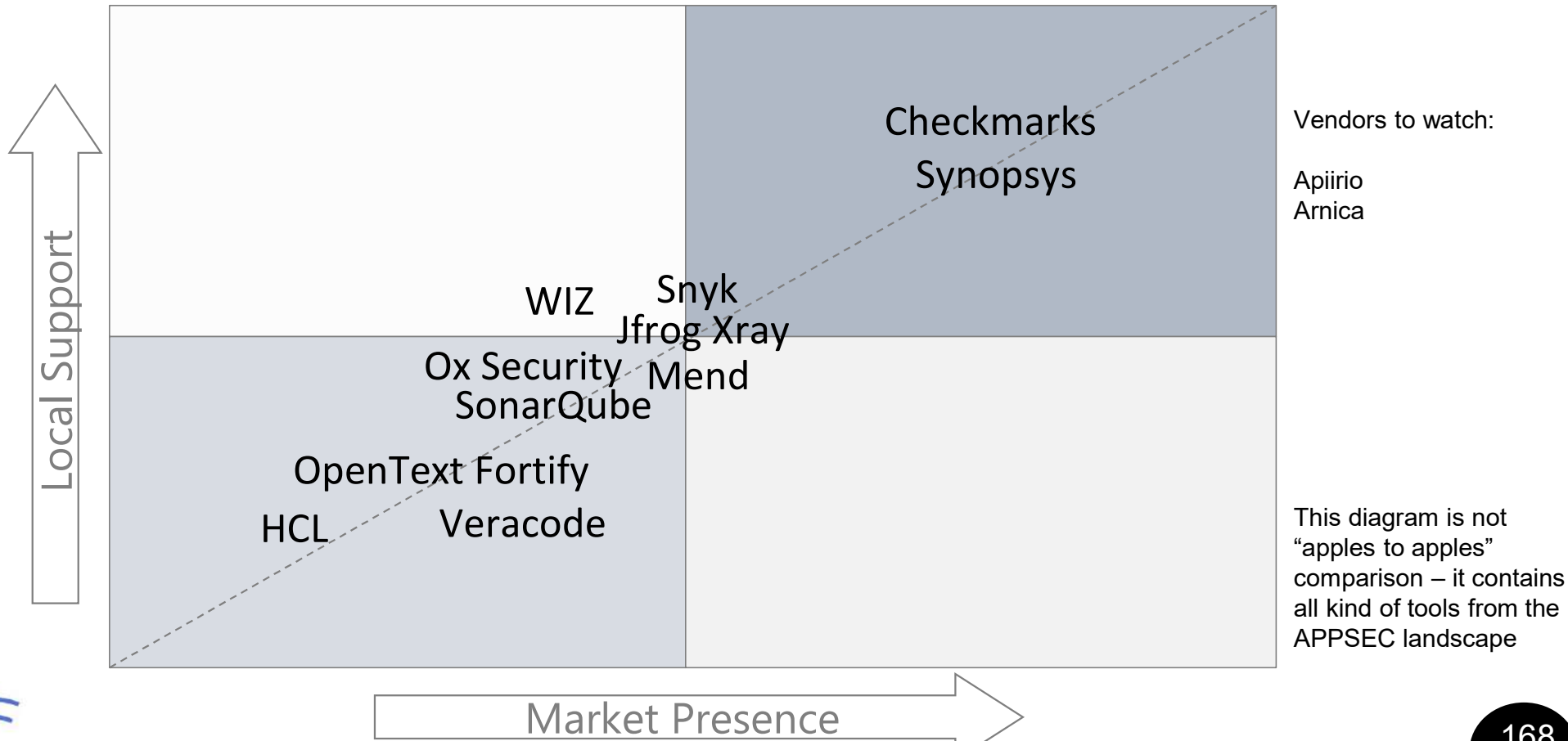
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Israel APP SEC for enterprises - market presence 2024



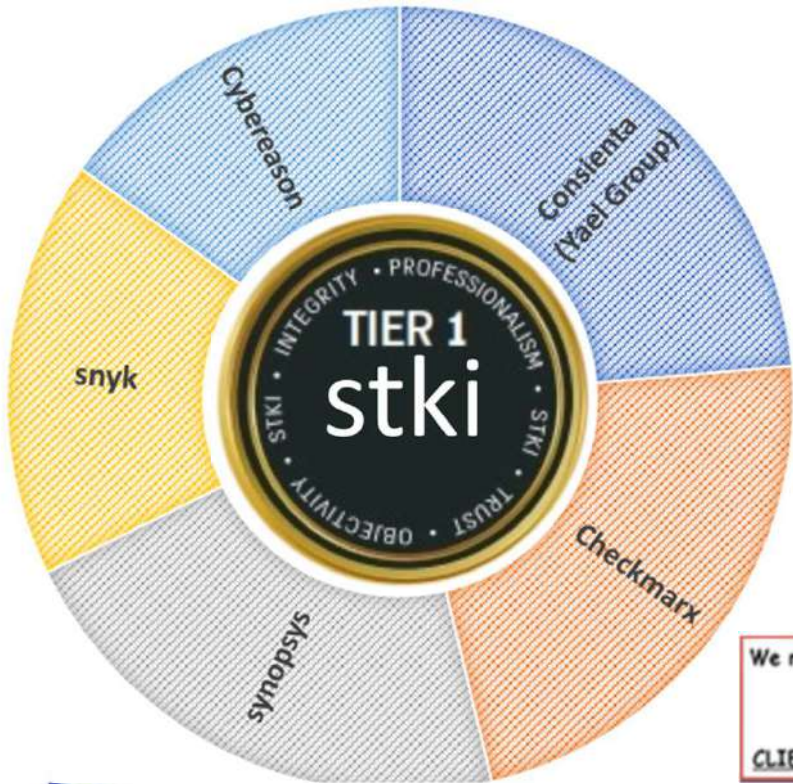
This diagram is not “apples to apples” comparison – it contains all kind of tools from the APPSEC landscape



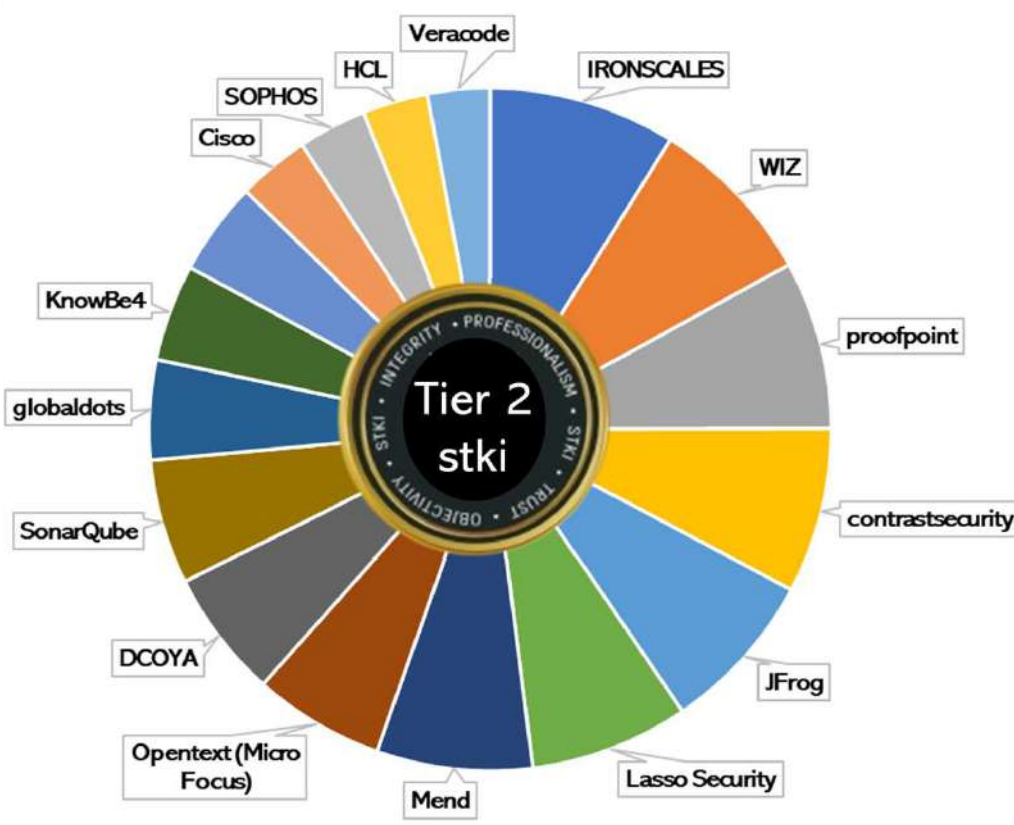
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other cyber tools (secure development, awareness etc.)



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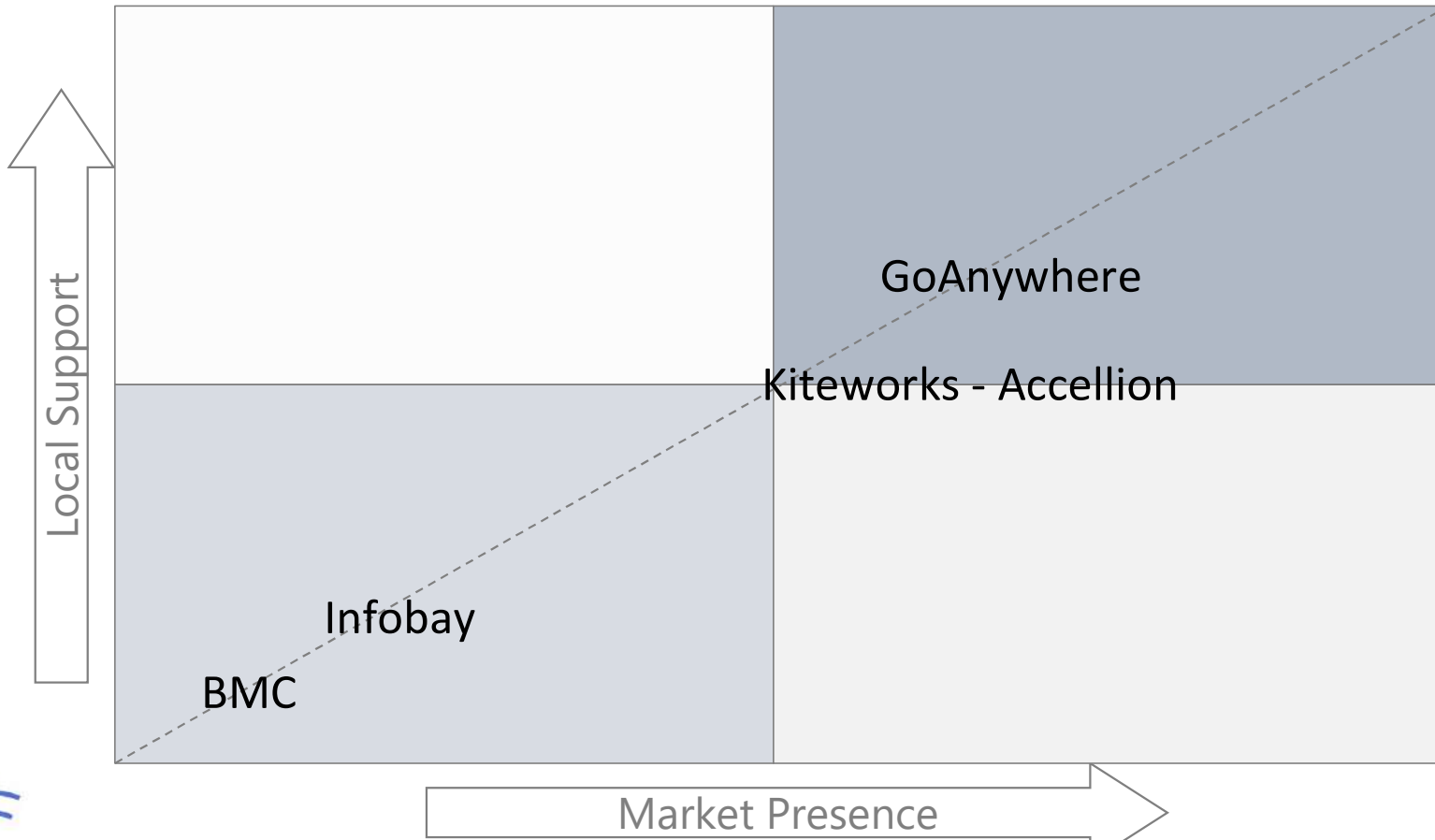
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Brands in Enterprise B2B Vaults (replacing Cyberark vaults) market presence 2024



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Project Development & Management Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Project & Portfolio Management	\$28.00	3.57%	\$29.00	-13.79%	\$25.00	-12.00%	\$22.00	18.18%	\$26.00	19.23%	\$31.00	22.58%	\$38.00	23.68%	\$47.00	23.40%	\$58.00
Development tools, ALM, DevOps for all environments (including Mobile)	\$74.00	2.70%	\$76.00	-14.47%	\$65.00	6.15%	\$69.00	4.35%	\$72.00	9.72%	\$79.00	10.13%	\$87.00	10.34%	\$96.00	11.46%	\$107.00
Low Code tools	\$2.00	115.00%	\$4.30	39.53%	\$6.00	50.00%	\$9.00	11.11%	\$10.00	20.00%	\$12.00	50.00%	\$18.00	55.56%	\$28.00	25.00%	\$35.00
TOTALS	\$104.00	5.10%	\$109.30	-12.17%	\$96.00	4.17%	\$100.00	8.00%	\$108.00	12.96%	\$122.00	17.21%	\$143.00	19.58%	\$171.00	16.96%	\$200.00

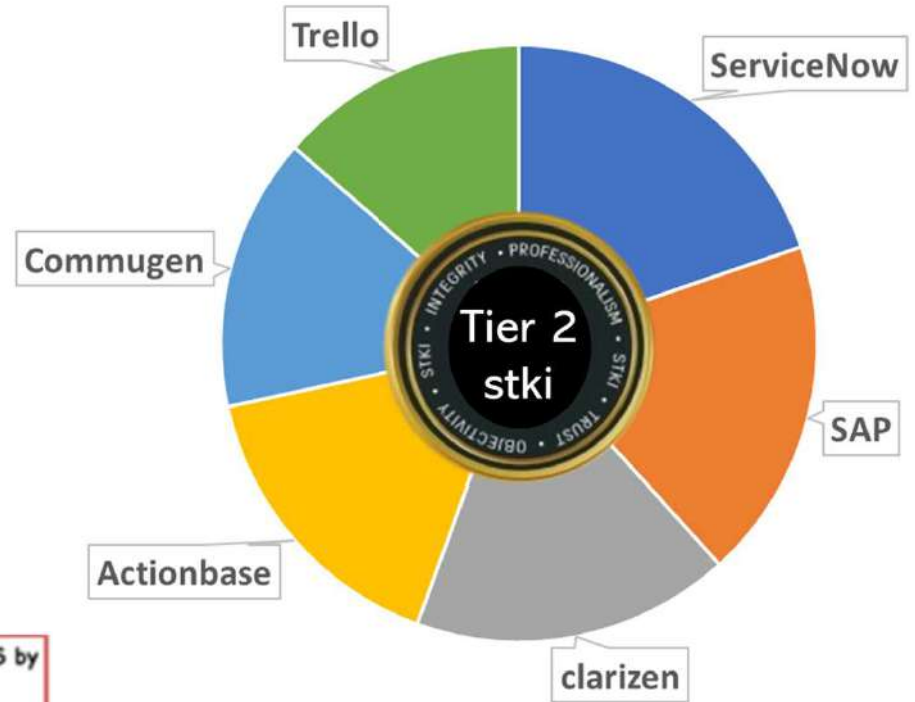
Values in Million USD



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Project & Portfolio Management Tools



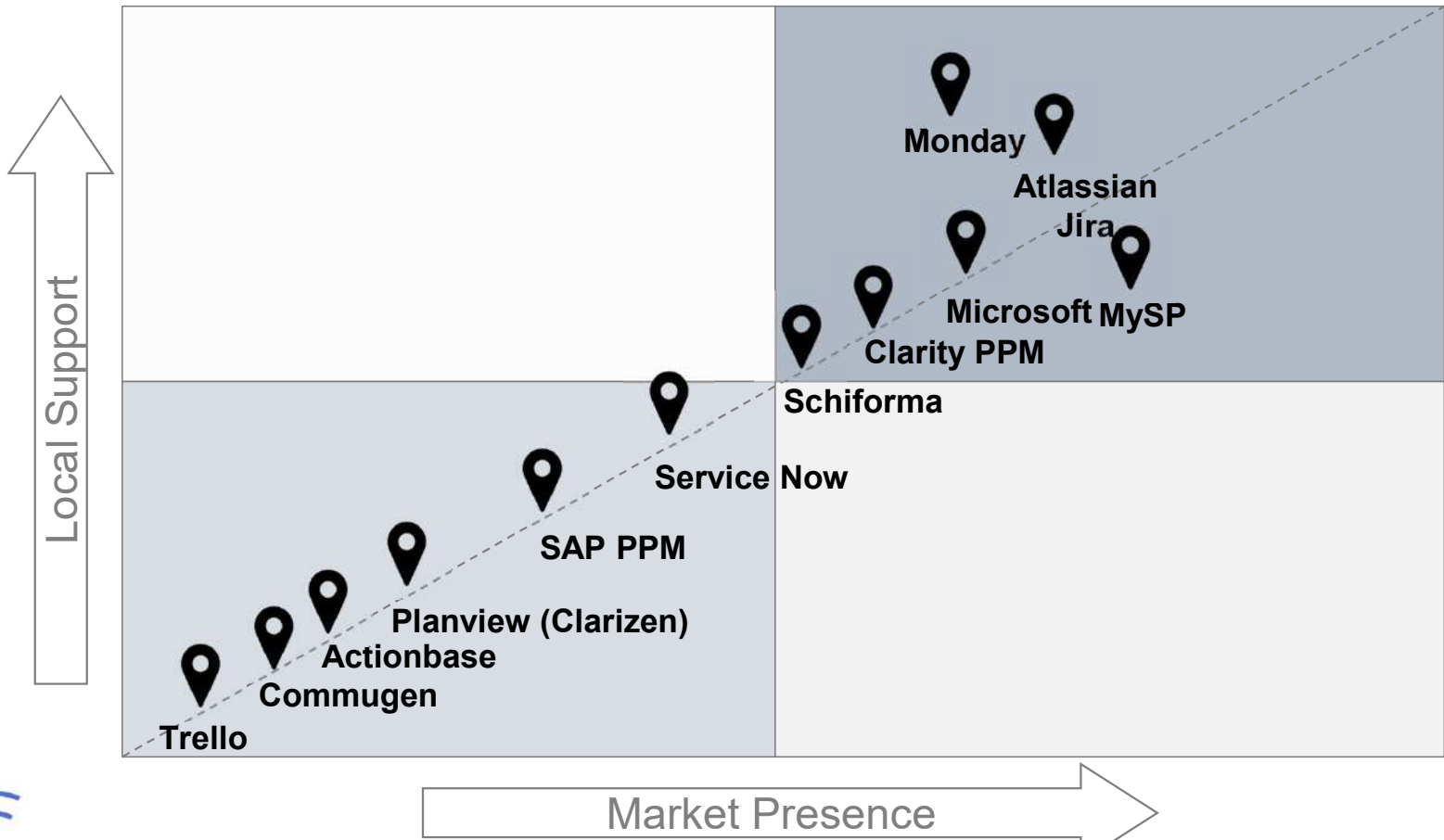
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PPM Israeli Market Positioning– 2024



Vendor to watch:
Zoho



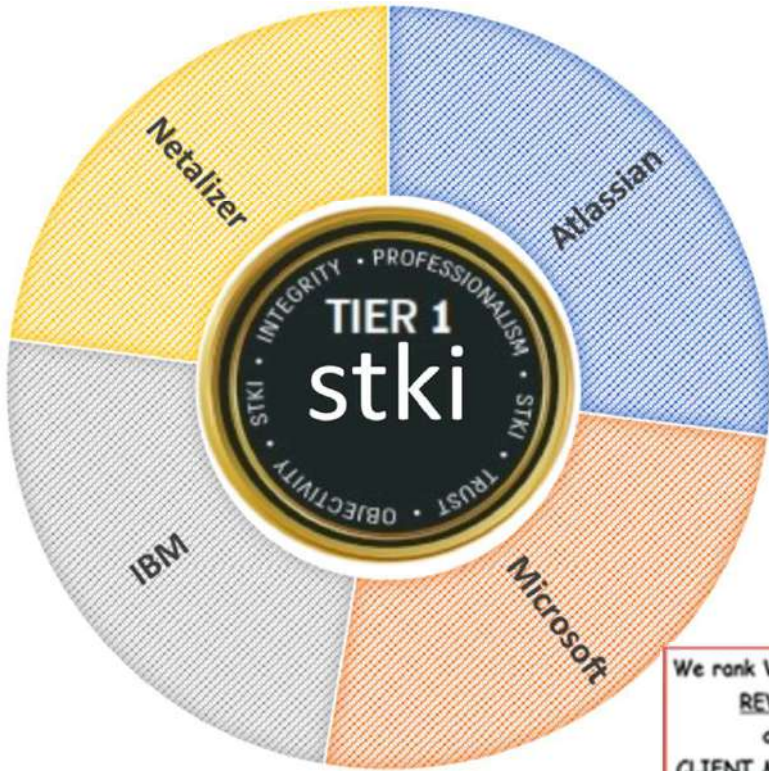
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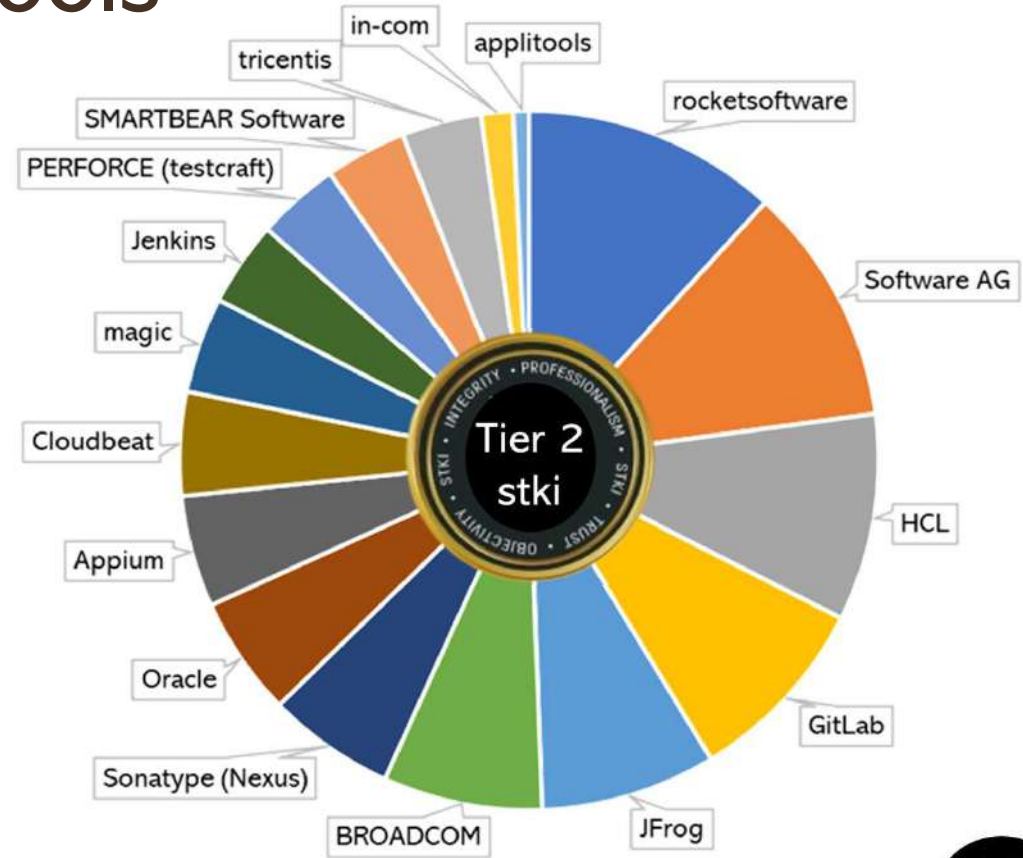
PPM Tools & Integrators in Israel

	Integrators
Clarity PPM By Broadcom	Proceed (HMS)
EPM Microsoft	Matan, Abra, DeePlan (PZ Projects)
Atlassian Jira	Methoda, Matrix, Practiproject, Abra, Proceed, Bynet
Monday.com	Advanced Solution Partner: Abra, Boost; Platinum: Matrix, KPMG, ESL; Gold: Abra, Moveo; Silver: TWODO, Entry point Proceed
MySP	ONE1
Sciforma	Top Group
ServiceNow Strategic Portfolio Management	Dicomano One, Deloitte, Bynet, Verdera
SAP PPM	SAP, Proceed, Matan, Malam other potential SAP integrators
Clarizen (Purchased by PlanView)	DeePlan (PZ Projects)

Development, Mobile, ALM & DevOps tools



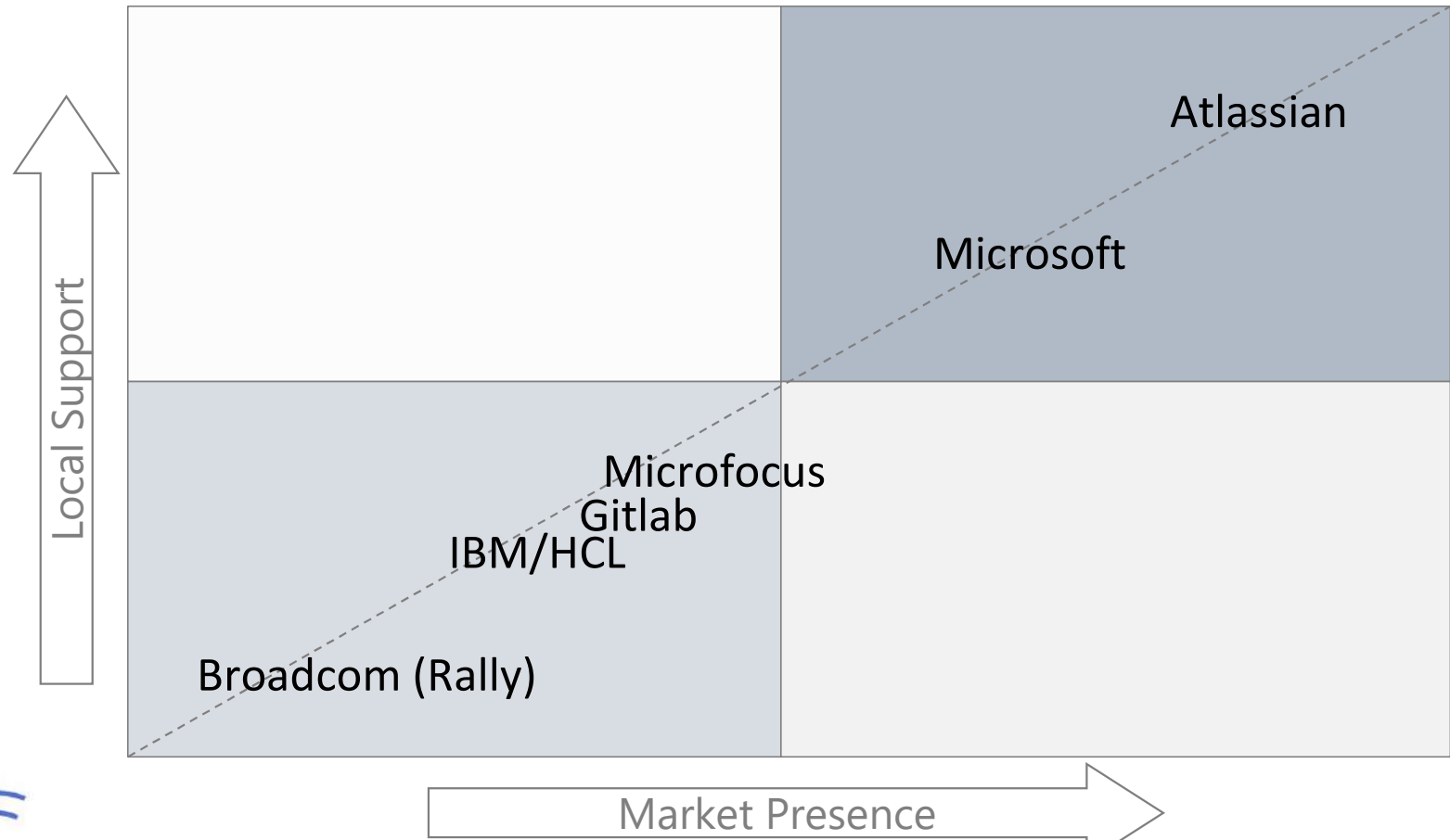
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ALM (Application Lifecycle Management)- Israeli market presence 2024



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Israeli ALM selected integrators

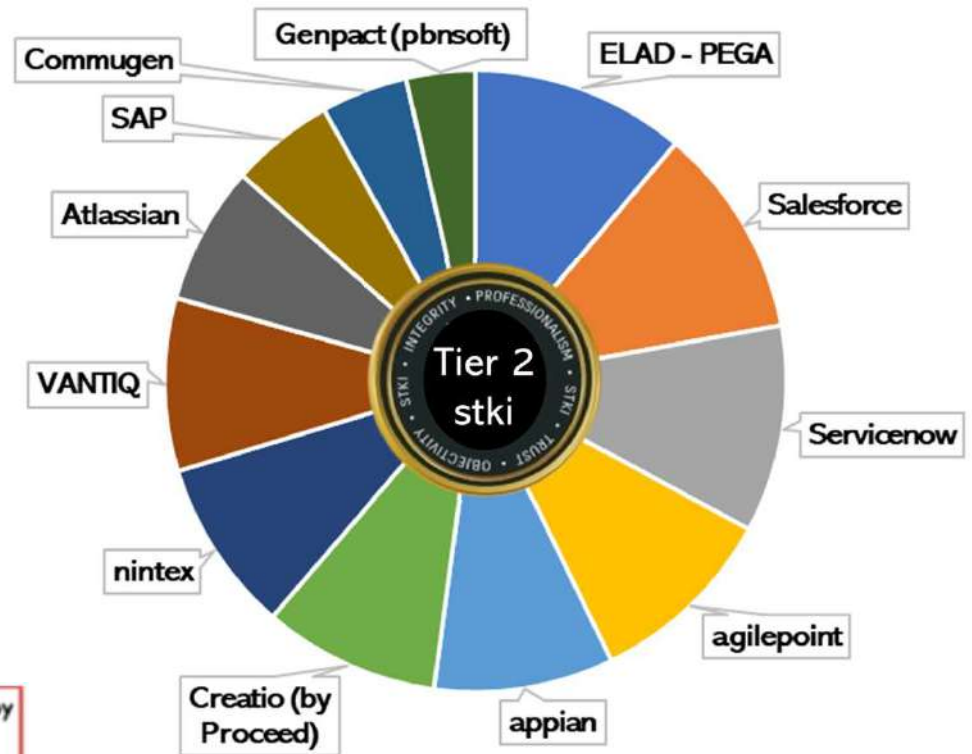
Vendor	Product	Israeli Rep.	Integrators
Atlassian	Jira, Confluence, Bitbucket, etc.		Methoda, Matrix, practiproject , HMS-Proceed. Agilesparks
Broadcom	Rally		NessPro
Microfocus	QC, Octaine, etc.	Microfocus Israel	matrix qualitsset vness
Gitlab	Gitlab		ALM Toolbox
sonatype			Matrix



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Low Code (includes BPM) tools



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EGRC & Regulation Tools Market 2018-2026

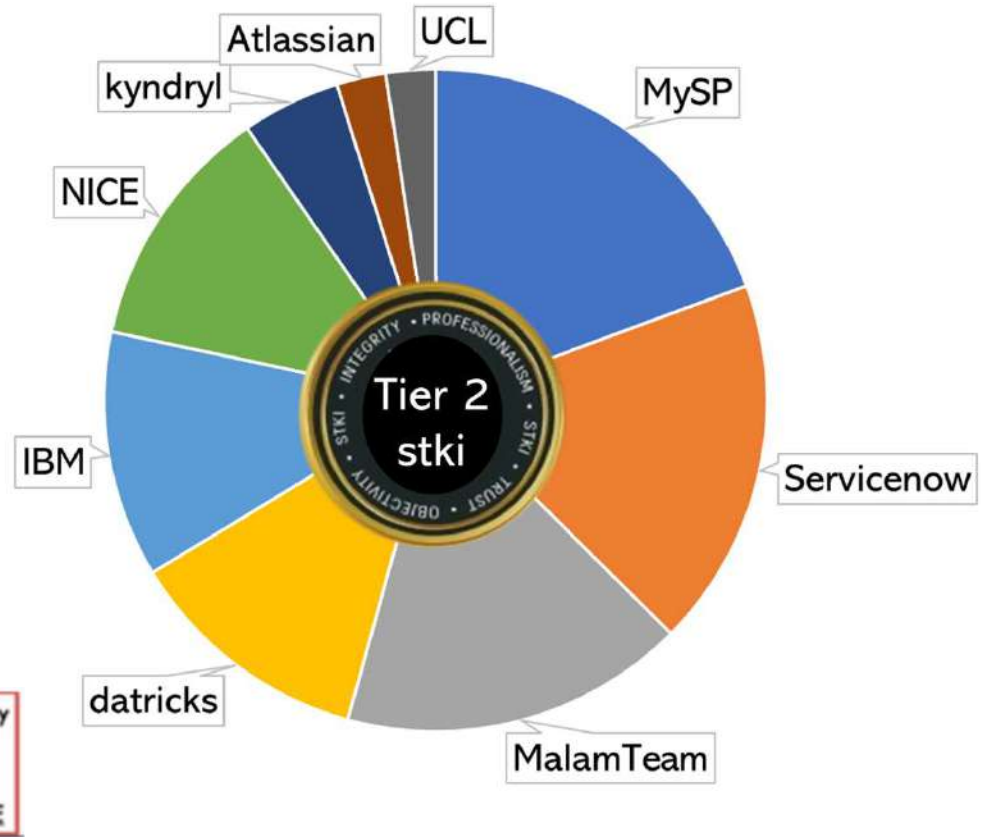
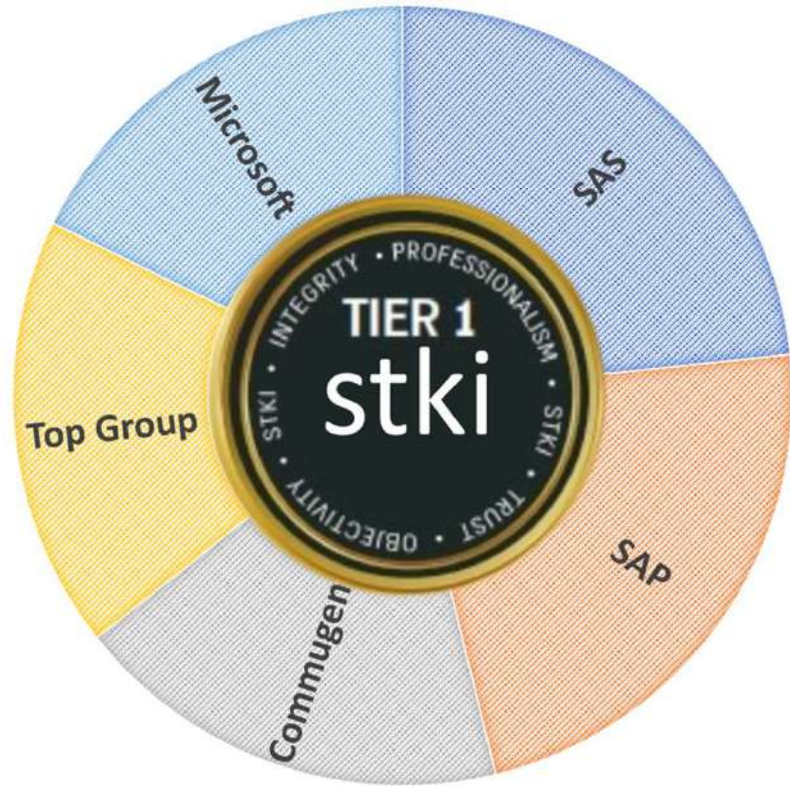
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Governance, Risk & Compliance	\$20.00	24.50%	\$24.90	-19.68%	\$20.00	-10.00%	\$18.00	-22.22%	\$14.00	-3.57%	\$13.50	11.11%	\$15.00	13.33%	\$17.00	11.76%	\$19.00
Regulation									\$8.00	-12.50%	\$7.00	21.43%	\$8.50	17.65%	\$10.00	20.00%	\$12.00
TOTALS	\$20.00	24.50%	\$24.90	-19.68%	\$20.00	-10.00%	\$18.00	22.22%	\$22.00	-6.82%	\$20.50	14.63%	\$23.50	14.89%	\$27.00	14.81%	\$31.00

Values in Million USD



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Governance, Risk & Compliance Tools

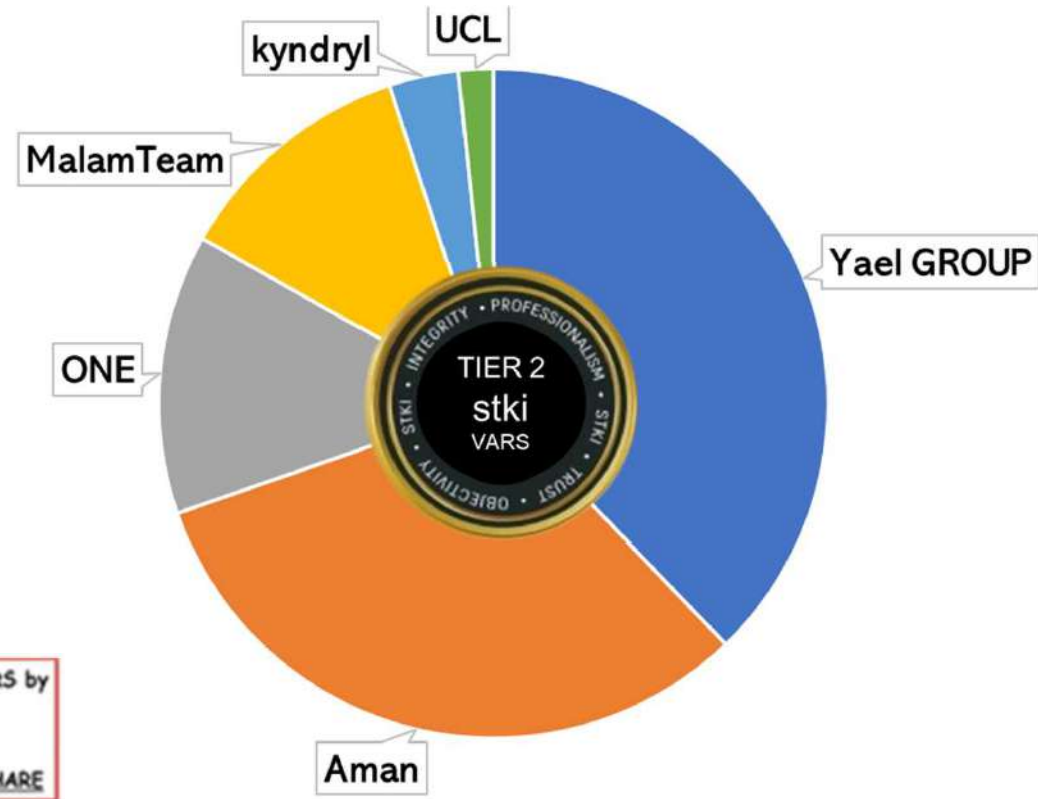
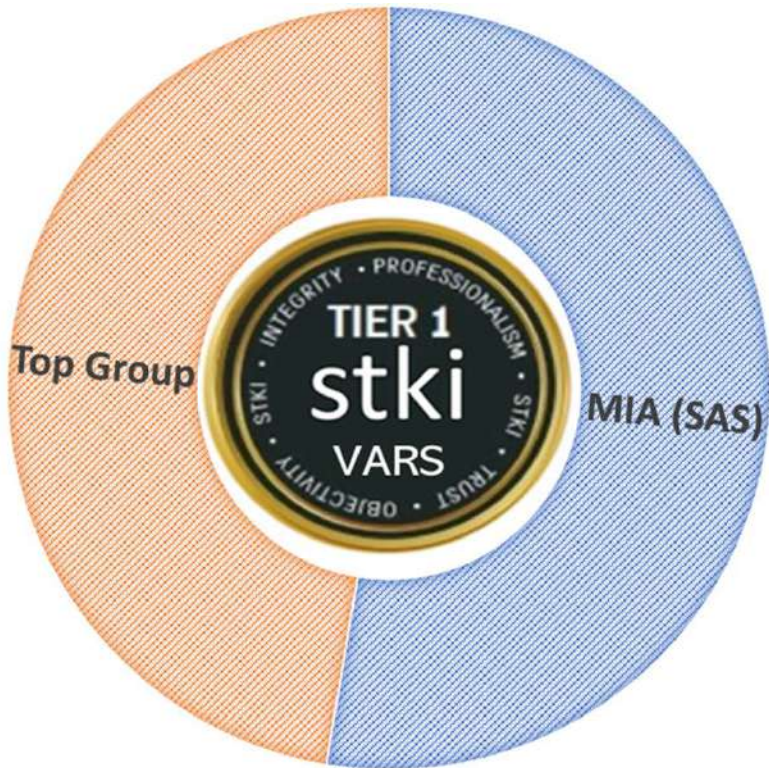


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Governance, Risk & Compliance Tools (VARs)



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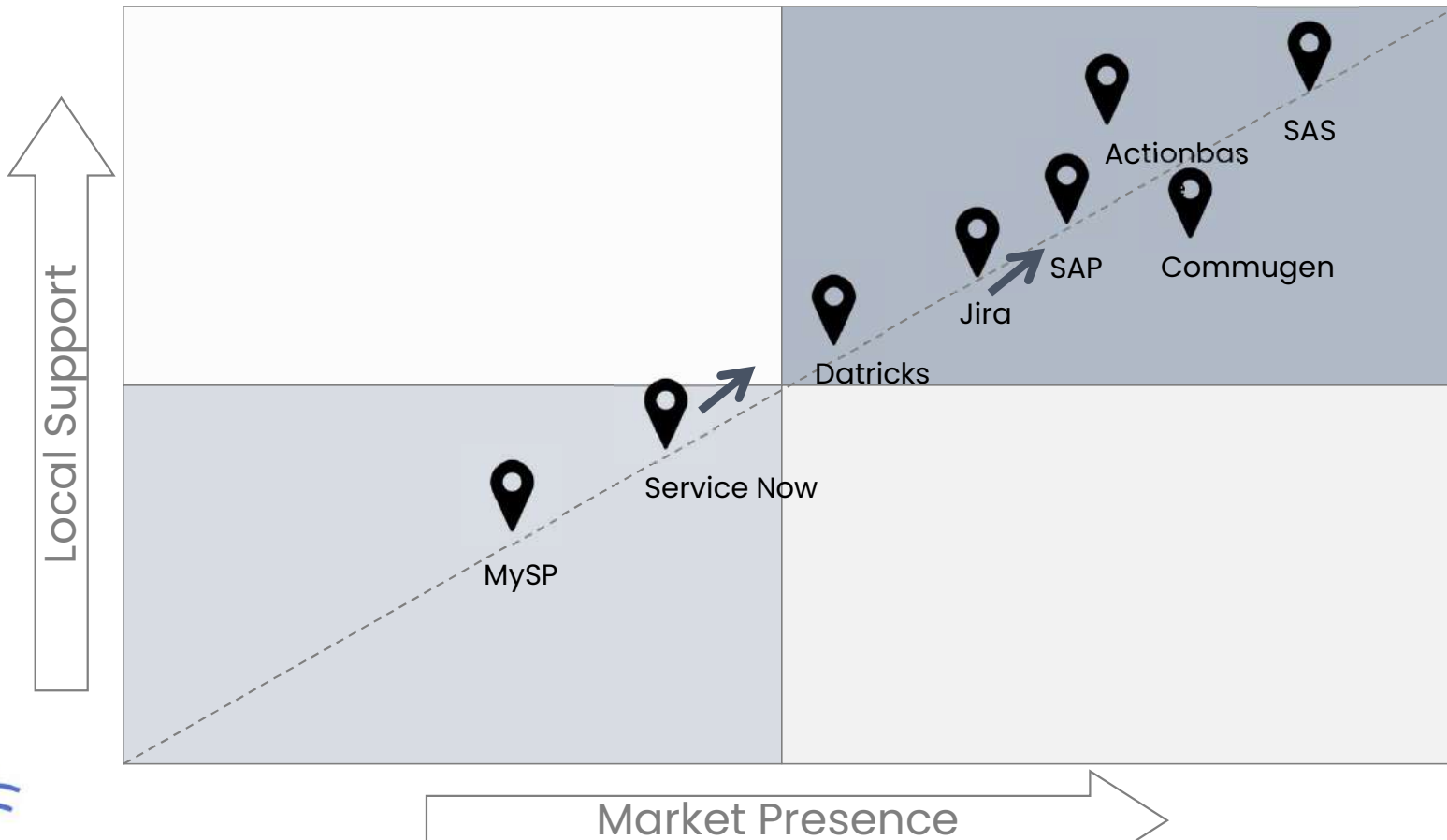


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GRC 2024

Israeli Market Positioning



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GRC Tools & Integrators in Israel 2024

Global Players:	Integrators
SAP GRC	Malam, KPMG, Deloitte, Globicon, ONE, SAP integrators
IBM OpenPages	IBM Expert Labs, ABP, Malam, Matrix
SAS	MIA, Entropy
Service Now	Cognizant ,Bynet ,Deloitte ,Docomano One
Jira GRC	Methoda, Matrix, Partiproject, Abra, Proceed
Local Players:	Integrators
Commugen	Commugen
Actionbase	Top Group, Deloitte
Datricks (Financial Integrity Platform)	Datricks, SAP
MySP	ONE



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Knowledge & Collaboration Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
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	-7.14%	\$130.00	11.54%	\$145.00	10.34%	\$160.00	11.25%	\$178.00
Digital Output Management/Customer Communication Management	\$20.00	10.00%	\$22.00	13.64%	\$25.00	8.00%	\$27.00	7.41%	\$29.00	-13.79%	\$25.00	8.00%	\$27.00	11.11%	\$30.00	13.33%	\$34.00
Employee Collaboration, Task Management & Engagement Tools	\$8.00	25.00%	\$10.00	50.00%	\$15.00	33.33%	\$20.00	15.00%	\$23.00	-8.70%	\$21.00	9.52%	\$23.00	10.87%	\$25.50	9.80%	\$28.00
TOTALS	\$203.00	-3.94%	\$195.00	1.54%	\$198.00	2.02%	\$202.00	-4.95%	\$192.00	-8.33%	\$176.00	10.80%	\$195.00	10.51%	\$215.50	11.37%	\$240.00

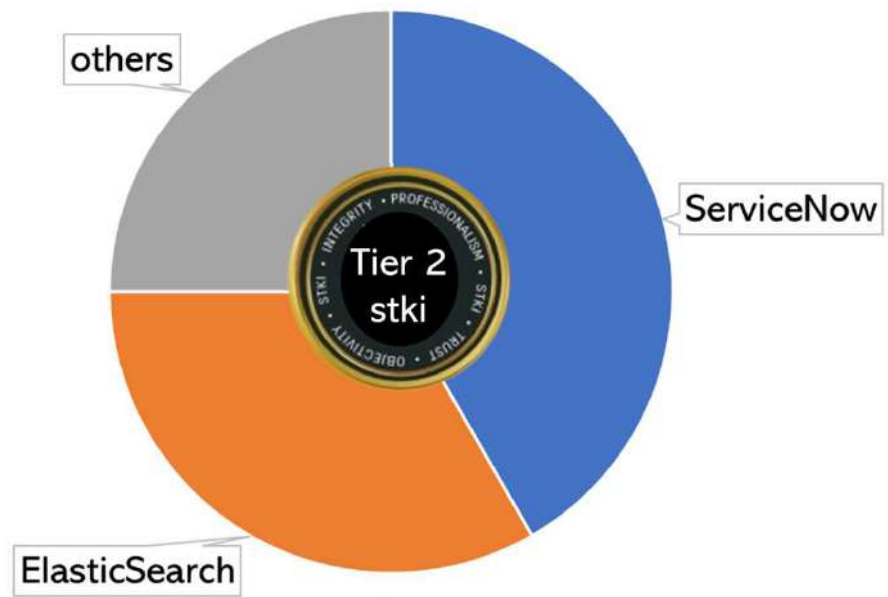
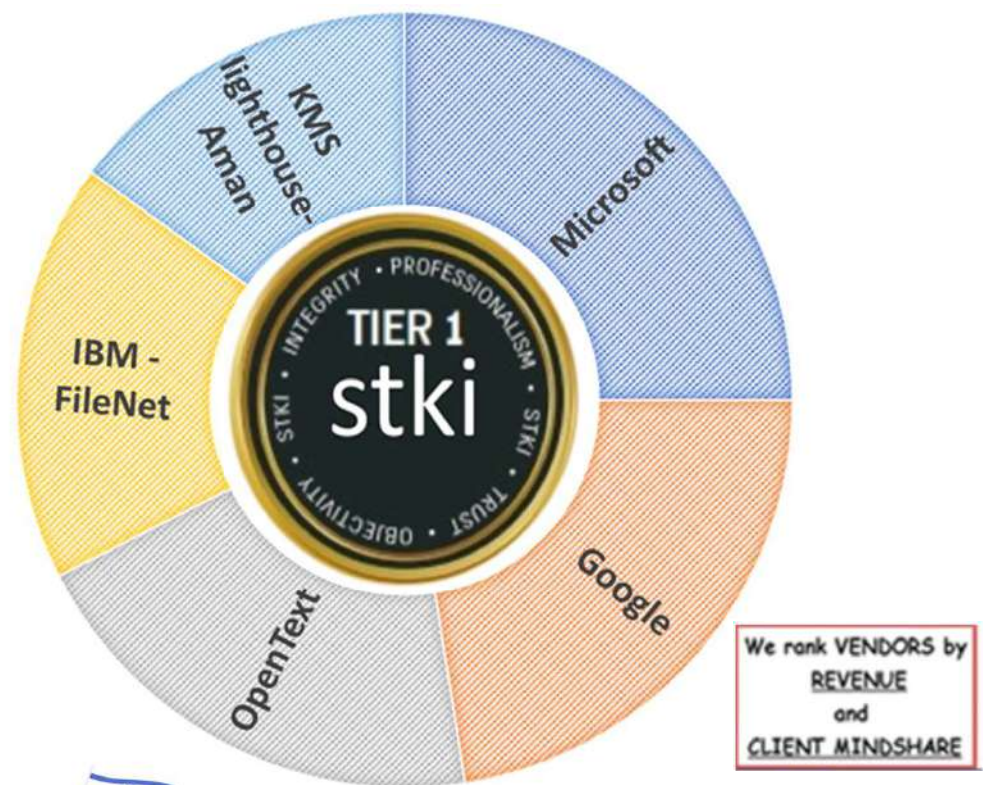
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Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)



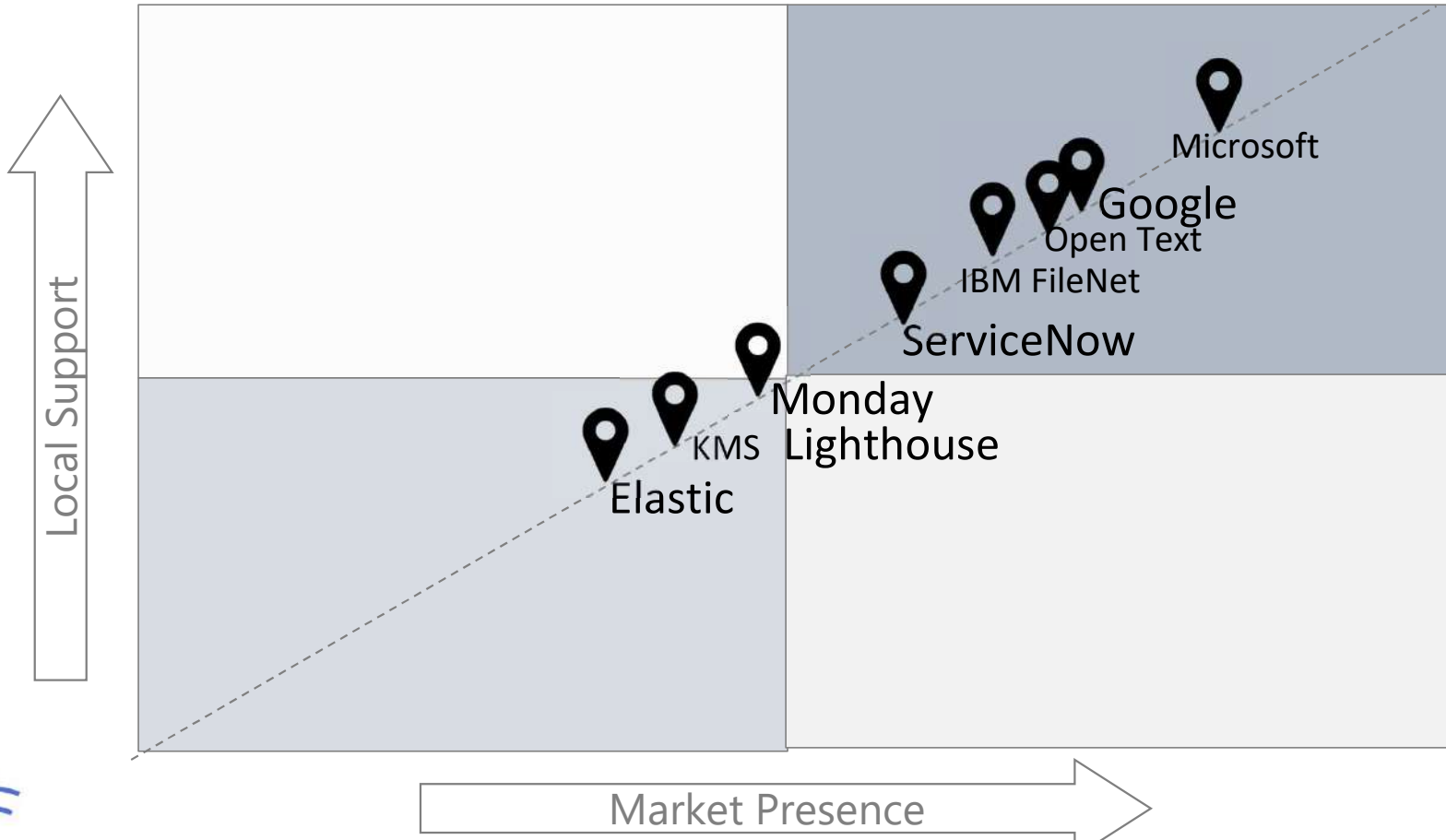
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Office Productivity and Knowledge Man. Tools 2024

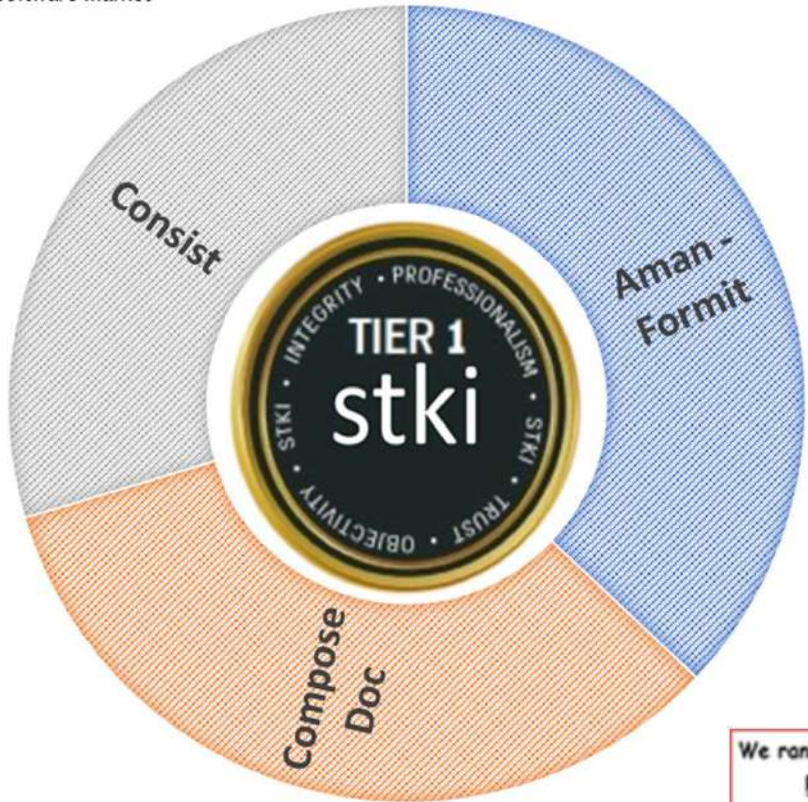
(ECM, Portals, Search, Knowledgebases..)



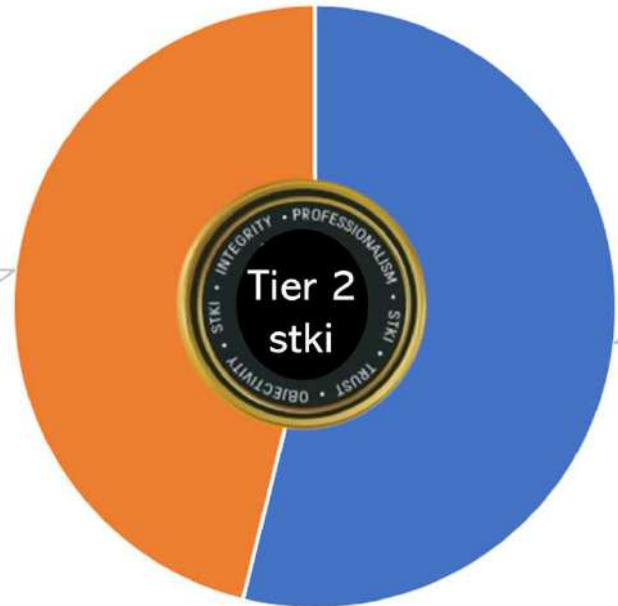
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Digital Output Management/Customer Communication Management



Docomotion



OpenText

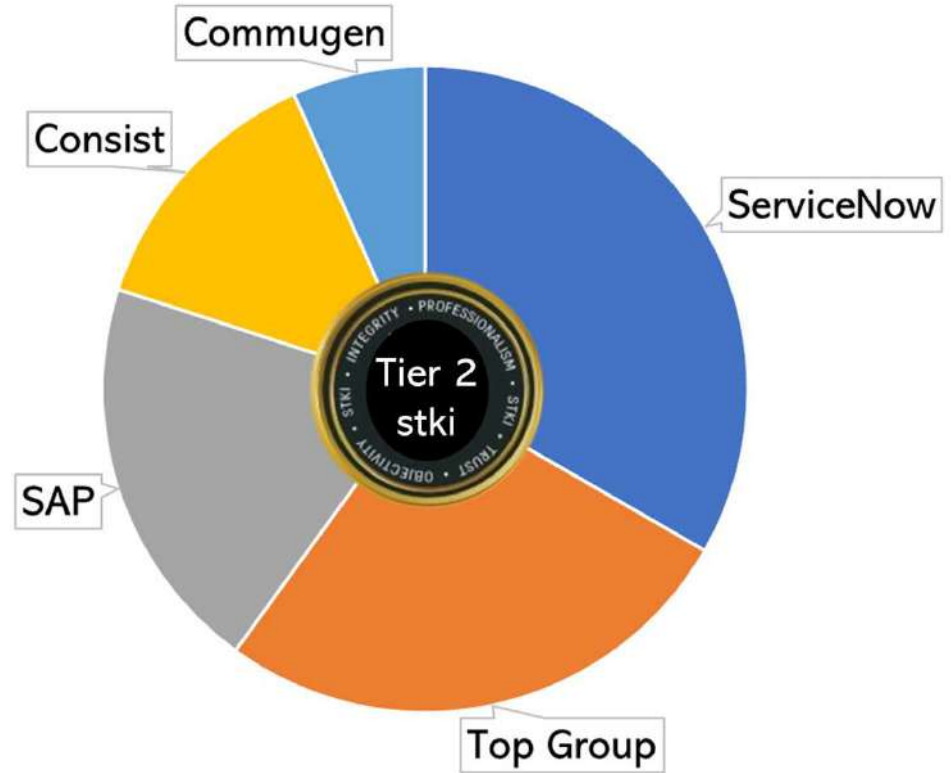
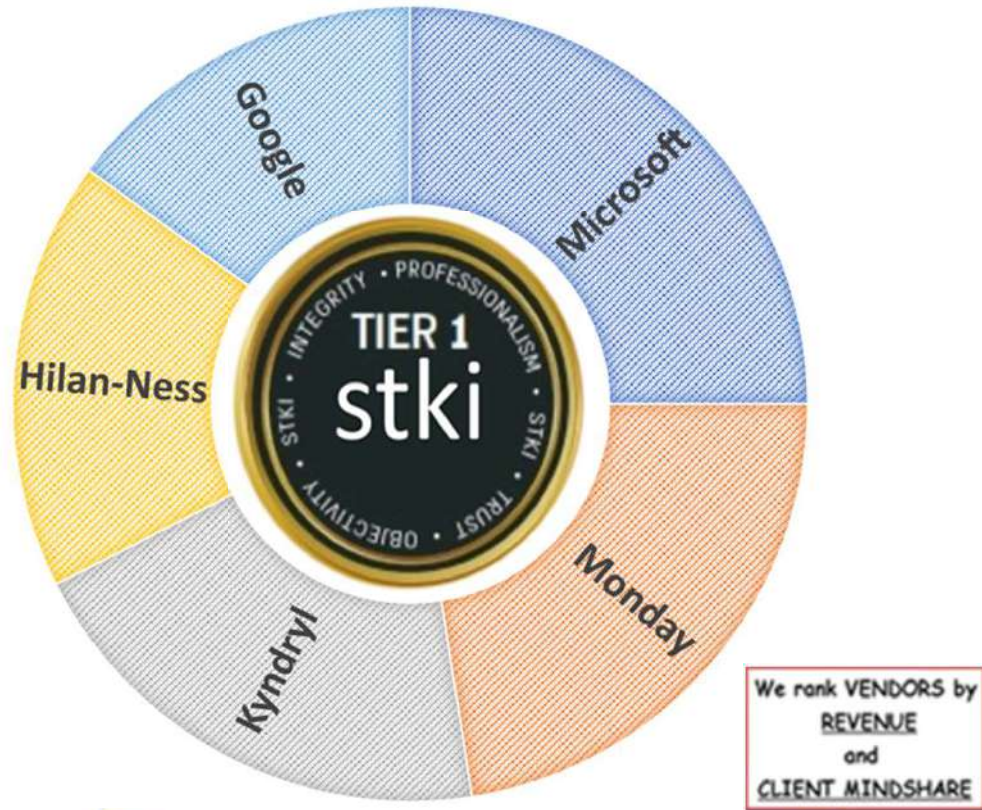
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Employee Collaboration & Engagement Tools



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Analytics, Data Management, Data Science and ML/AI Tools Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
BI and Data Discovery Tools	\$125.00	4.00%	\$130.00	7.69%	\$140.00	7.14%	\$150.00	3.33%	\$155.00	-1.94%	\$152.00	1.97%	\$155.00	6.45%	\$165.00	6.67%	\$176.00
Data Mgmt. Tools (including data catalog, governance, ETL, quality)	\$45.00	11.11%	\$50.00	16.00%	\$58.00	3.45%	\$60.00	5.00%	\$63.00	-4.76%	\$60.00	-3.33%	\$58.00	3.45%	\$60.00	5.00%	\$63.00
Data Science and ML/AI Tools	\$13.00	53.85%	\$20.00	45.00%	\$29.00	24.14%	\$36.00	13.89%	\$41.00	-14.63%	\$35.00	22.86%	\$43.00	23.26%	\$53.00	26.42%	\$67.00
TOTALS	\$183.00	9.29%	\$200.00	13.50%	\$227.00	8.37%	\$246.00	5.28%	\$259.00	-4.63%	\$247.00	3.64%	\$256.00	8.59%	\$278.00	10.07%	\$306.00

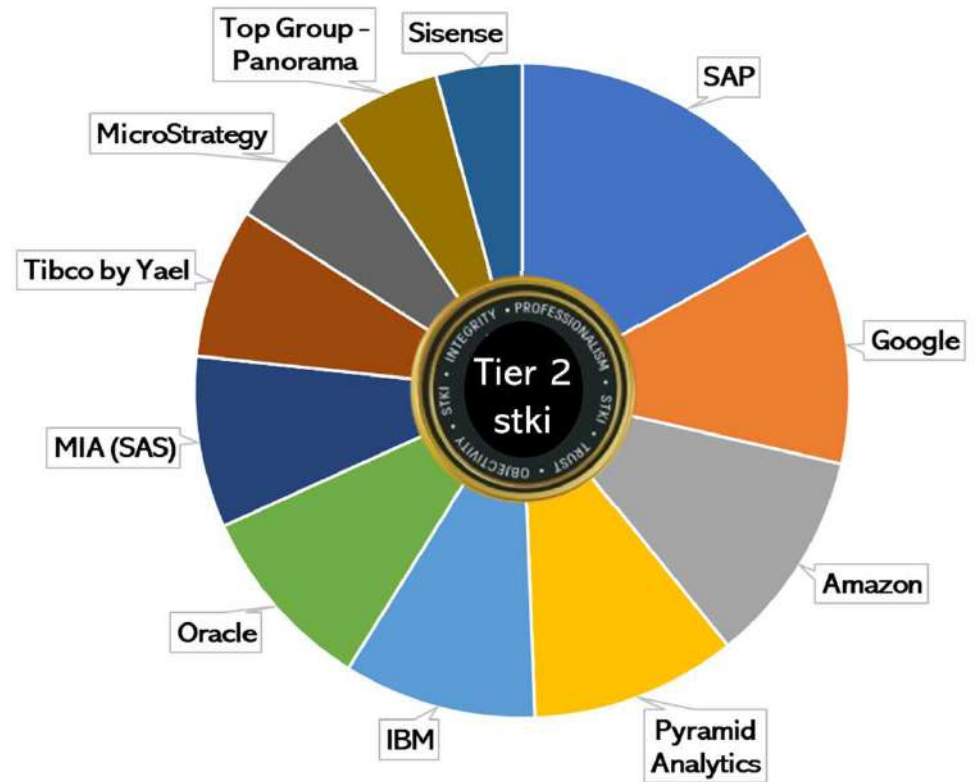
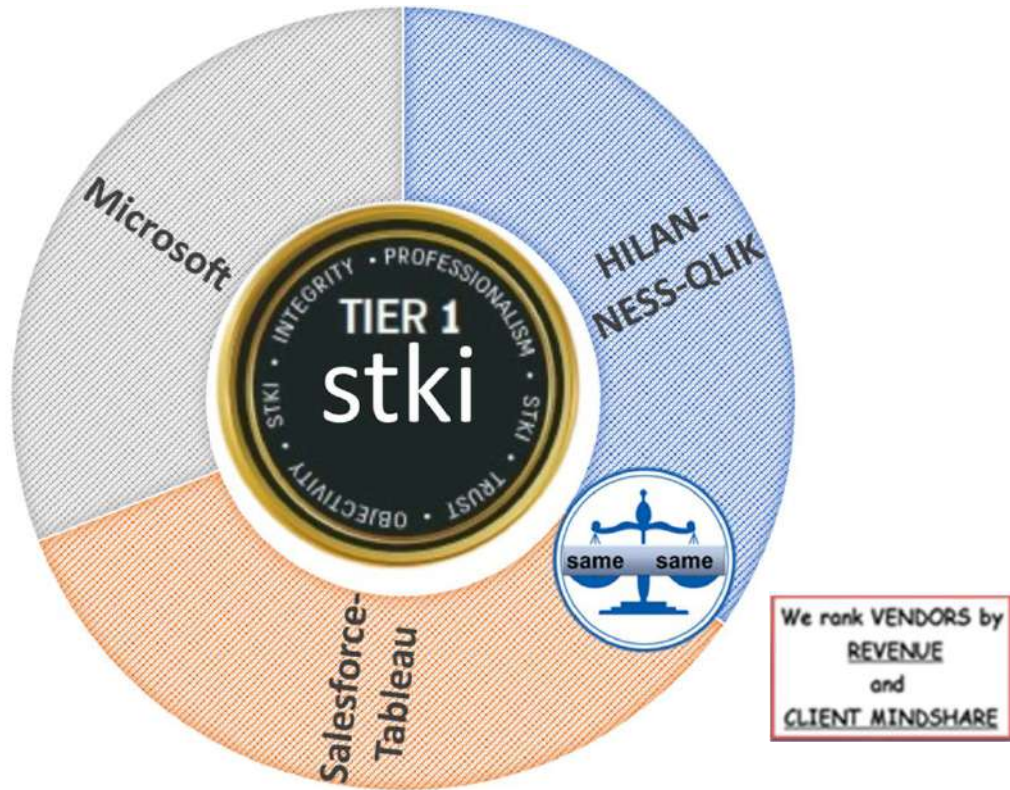
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BI and Data Discovery Tools





Business Intelligence 2024

Presence & Support in Israel



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Business Intelligence (BI) - Part 1:

Package	Rep Israel	Integrators
SAP SAC	SAP Israel	one, Hilan-Ness, iProsis Matrix DnA, Malam-Team, Skywind, BDO (BICS), Yael, Aman, Opisot-Genius(SQLLink), Nogamy, abra (BO), Data Cube
Qlik	Hilan – Qlik Israel	oneBI, DataMind, MatrixDnA, Logical Systems, Aspect-Tech, DtBit, Greenhouse, Tirosh, Anagal (abra), Hilan –Ness- Qlik, ExperisBI, Malam-Team, Opisoft-Genius(SQLLink)
Microsoft Power BI	Microsoft Israel	Aman - Eternity, Opisot-Genius(SQLLink), Hilan-Ness, one, MatrixDnA, Consist, Bynet SW, Elad Data, Malam-Team, Data Cube, Vision.bi, MCS, SolidBI, Yael, Nogamy, abra, PWC
Pyramid Analytics	Pyramid Israel	Nogamy, Yael
IBM Cognos Analytics	IBM Israel	Yael, one, Seven-D, Consist, Aman - Eternity, Normative, MatrixDnA, Malam-Team, , Opisoft-Genius(SQLLink)
Salesforce (Tableau)	Salesforce Israel	SIT, Gstat, Vision.bi, Nogamy, Yael, Aman-Asperi, AllCloud Naya, MatrixDnA, abra , Hilan-Ness., , Opisoft-Genius(SQLLink), Malam-Team

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Business Intelligence (BI) - Part 2:

Package	Rep in Israel	Integrators
SAS BI + VA	Mia Computers (SAS)	Mia computers, Yael, Pareto, Nogamy
Microstrategy	Microstrategy Israel	I.E Mittwoch, Twingo Commit, Matrix DnA, StrategyBI
Oracle Analytic Cloud	Oracle Israel	Oracle Consulting, Vision.bi, BeWise, one, abra (Visual Analyzer), Deloitte
Tibco Jaspersoft Tibco Spotfire Web Focus (acquired by Tibco)	Yael	Yael, Malam Team (Web Focus)
Panorama - Necto	Top Group (acquired Panorama)	Top Group
Sisense	Sisense	MatrixDnA
re:Dash (acquired by Databricks)	Databricks Israel	
Looker – Google	Google Israel	Twingo Commit, Bynet Kaleidoo, Opisot-Genius(SQLink), one...
Quicksight - Amazon	Amazon Israel	One, Allcloud....
Domo	Elad Data	Elad Data
Thoughtspot		VisionBI, Be2See (Emet)

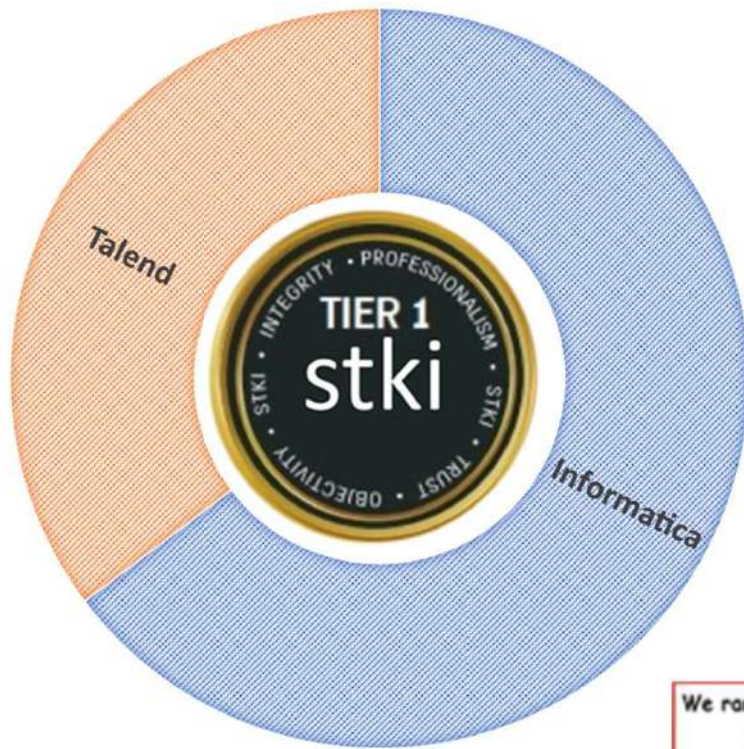


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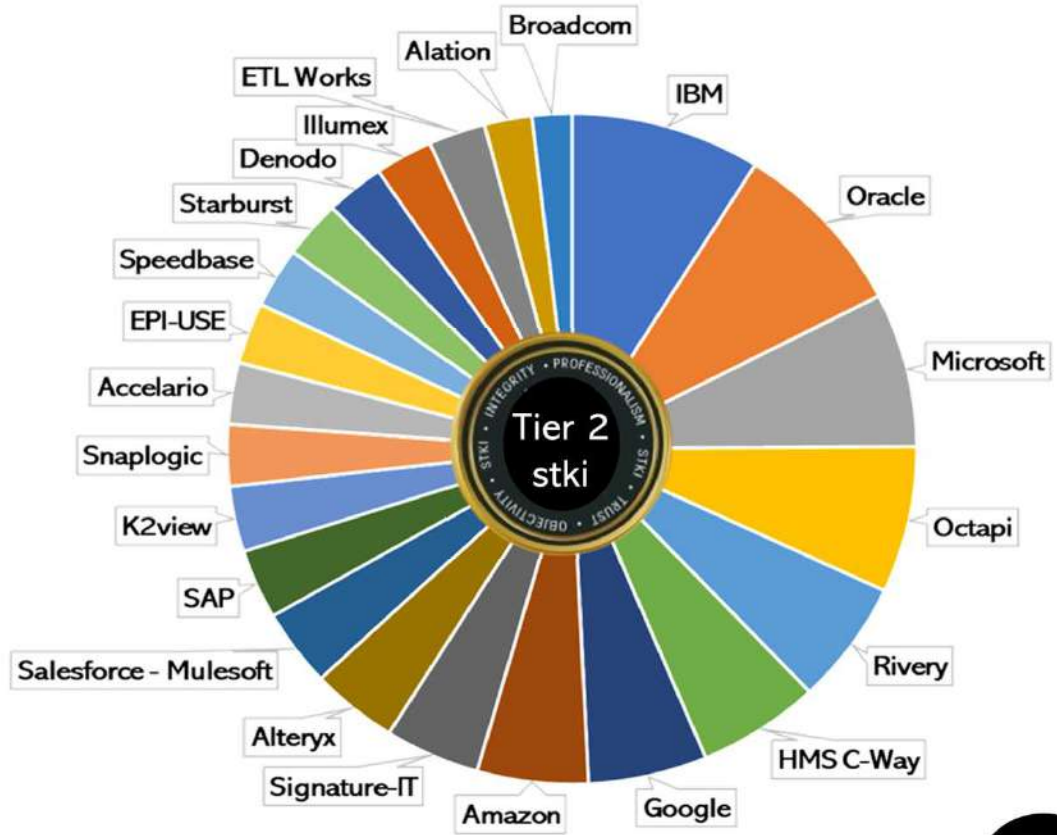


Data Mgmt. Tools

(including data catalog, governance, ETL, quality, CDP)



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Data Catalog, Data Governance and Data Preparation Tools

Product	Description	Rep/Partners in Israel
Informatica EDC	Data Catalog, Data Governance	Informatica Israel, Aman
WKC: Watson Knowledge Catalog And Manta for lineage	Data Catalog and Lineage	Yael
Qlik-Talend Data Catalog	Data Catalog	Hilan-Ness-Qlik, UCL Group
Databricks Unity Catalog		Databricks Israel, Matrix Databricks CoE
Octapi	Metadata Management, Data Lineage	Aman Computers - Eternity
Alteryx (+ acquired Trifacta)	Data Preparation	Rep: one, Partners: UCL Group, one, SIT
Apache Atlas	Data Catalog and metadata	Matrix DnA
Immuta	Data Privacy	Matrix DnA
Alation		Matrix DnA, Vision.bi
Azure Purview	Data Catalog	Microsoft Israel, Matrix and others...



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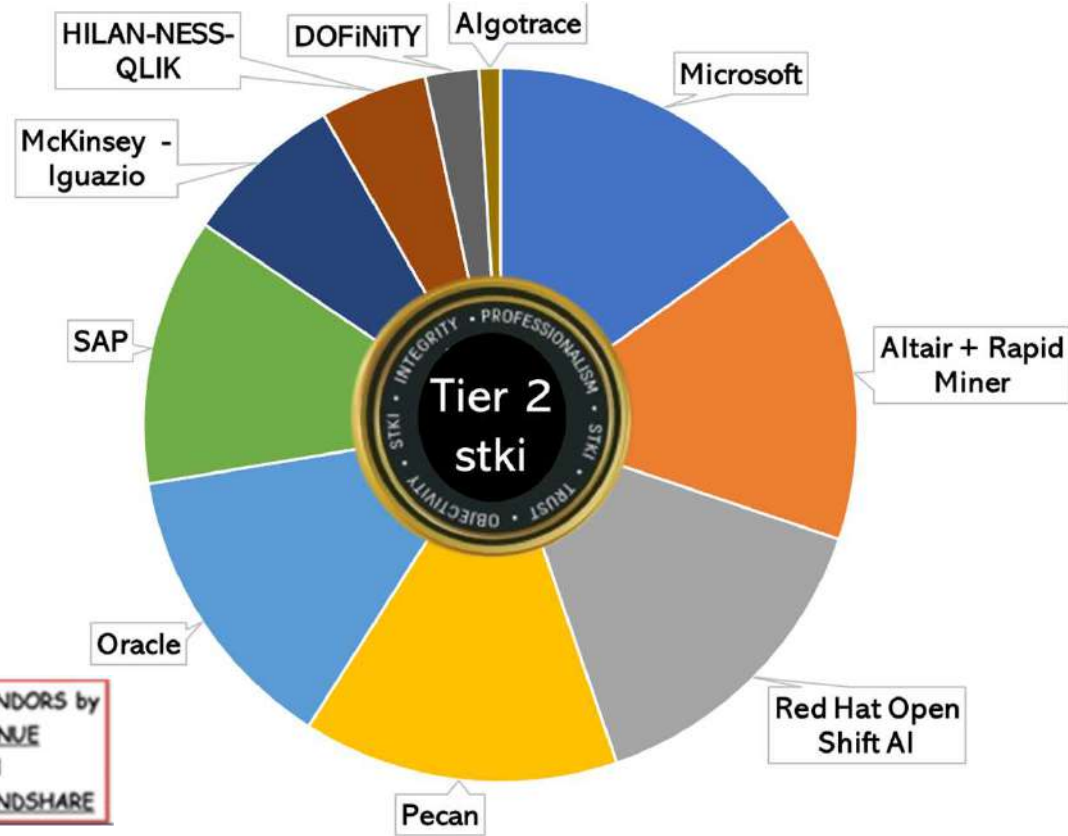
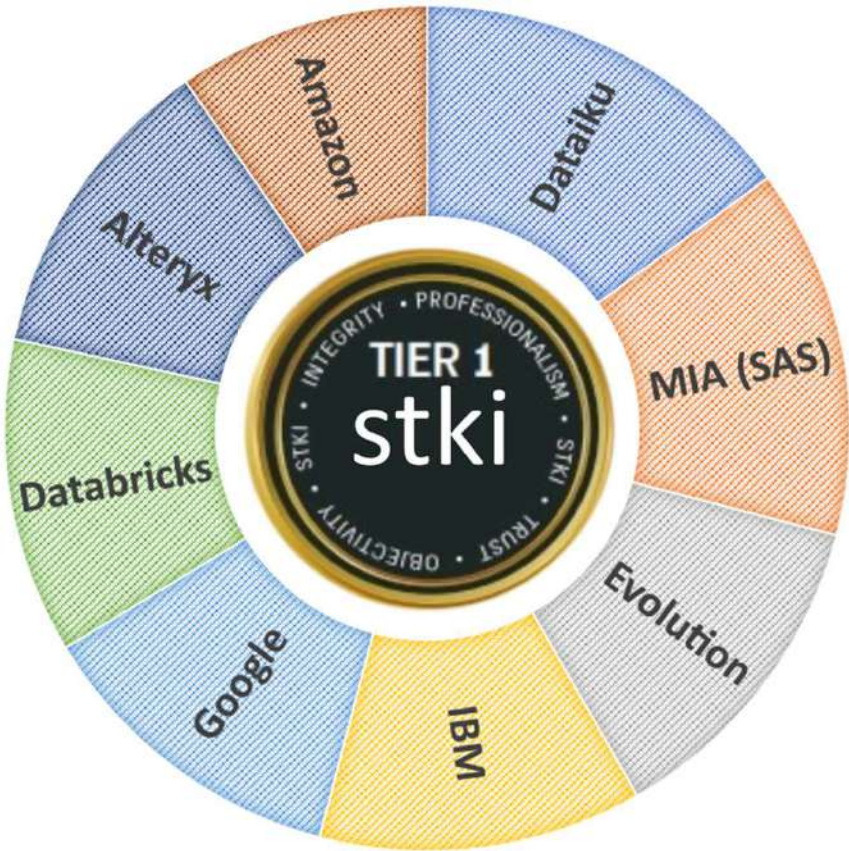
Digital Intelligence Solutions

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	Yael
Adobe	Adobe Israel	Deloitte Israel
Oracle (Web Trends, CX Unity, Infinity)	Oracle Israel	Oracle Consulting
Salesforce (Evergage)	Salesforce Israel	
SAS	Mia Computers	
Acoustic CXA	Be2see	Be2see



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Data Science and ML/AI Tools



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Data Science ML Platforms 2024

Presence & Support in Israel



Oracle
ClearML
Pecan
Red Hat Openshift AI
Nvidia AI Enterprise



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Data Science Platforms – Part 1:

Package	Rep in Israel	Integrators
SAS Viya, VS, cloud DS	Mia computers	Yael, Finity (Risk, CECL), EY (Solvency), KPMG (Costing, AML), Appsgate (Fin. Solutions), 7th Dimension (Risk and Finn. Solutions), Antropy (operational risk, compliance), EYC, HMS (CECL), Mia computers
Dataiku	Dataiku Israel	Matrix DnA, Naya, Gstat, Vision.bi, Deloitte
Databricks	Databricks	Aman, Commit, Sela, Matrix Databricks CoE, AllCloud, KPMG Edge, Deloitte, Malam-Team
Data Robot		Matrix DnA, Emet
Altair - RapidMiner	Altair	MatrixDnA
Alteryx	ONE	One, UCL, SIT
Earth by Evolution	Evolution	Malam-Team, Aman, one
Algotrace (Qualitest)		
NBO	Gstat	Gstat
Iguazio (McKinsey)	Iguazio, Belocal	Belocal, DSG
Tibco Spotfire (Statistica)	Yael Software	Yael Software
ClearML (MLOps)		Matrix DnA



Data Science Platforms – Part 2:

Package	Rep in Israel	Integrators
Oracle's OCI Data Science	Oracle Israel	Oracle Consulting, one
WatsonX.ai	IBM Israel	Nogamy, Matrix DnA, Aman Eternity, SQLink – Genius, Emet, Webtech, KPMG Edge, Deloitte, Yael (Content Analytics), one, Malam-Team
Microsoft Fabric, Azure ML/AI, Synaps	Microsoft	one, Opisot-Genius(SQLink), Aman, Elad Data, KPMG Edge, Data Cube, GRTH, Yael, Intuit, Malam-Team, MatrixDnA, Gstat, EY, Sela, Madera, Naya
Amazon SageMaker	Amazon Israel	Allcloud, MatrixDnA, Yael Opsguru
Google Vertex AI	Google Israel	Yael, Razorlabs, Bynet Kaleidoo, Kyndryl (GenAI)
SAC: SAP Analytics Cloud	SAP Israel	one, Hilan-Ness, iProsis, Matrix DnA, Malam-Team, Skywind, BDO (BICS), Yael, Aman - Eternity, Opisot-Genius(SQLink), Nogamy, Data Cube
Nvidia AI Enterprise	Nvidia	Deloitte (+Opteamizer), Kaleidoo by Bynet, one, Malam-Team
Pecan	Pecan	Pecan




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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)	IBM Partners (WatsonX.ai): Nogamy, Matrix, one (Libi), Malam-Team, Aman-Eternity, ABP consultancy. Webtech, SQLink - Genius
Amazon's Bedrock	Managed service for building GenAI applications	Amazon Israel Kyndryl
Databricks' Mosaic	Platform for creating and customizing 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



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Data Fabric solutions in Israel

Package	Description	Partners
Knowledge Discovery Platform	Knowledge Graph, Metadata driven data fabric using graph database	Matrix DnA
Starburst	Distributed analytic engine (Trino)	UCL Group
Dremio	Query Engine	Commit Twingo
K2View	Operational Data Fabric	
Denodo	Data Virtualization	Aman
Google Dataplex	Data Fabric catalog	
Illumex	Semantic Fabric	Matrix DnA, Nogamy

Data Virtualization Tools

Product	Integrator in Israel
Tibco Data Virtualization (acquired from Cisco)	Yael
SAS Virtualization	Mia Computers
Informatica Data Federation/Data Services	Aman Computers
IBM Data Virtualization	
Oracle Oracle Data Service Integrator	Oracle
SAP Hana data virtualization	SAP
Denodo	Aman



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Packaged GenAI solutions: coming soon!



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Enterprise Management Systems Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
ERP	\$120.00	10.00%	\$132.00	-28.03%	\$95.00	15.79%	\$110.00	13.64%	\$125.00	-8.00%	\$115.00	17.39%	\$135.00	17.04%	\$158.00	17.09%	\$185.00
vertical / core applications	\$185.00	8.11%	\$200.00	-15.00%	\$170.00	-11.76%	\$150.00	-10.67%	\$134.00	-10.45%	\$120.00	4.17%	\$125.00	5.60%	\$132.00	6.06%	\$140.00
CRM	\$60.00	10.00%	\$66.00	-6.06%	\$62.00	9.68%	\$68.00	17.65%	\$80.00	6.25%	\$85.00	5.88%	\$90.00	8.89%	\$98.00	12.24%	\$110.00
HR/ Talent Mgmt./ LMS	\$21.50	11.63%	\$24.00	16.67%	\$28.00	25.00%	\$35.00	22.86%	\$43.00	-11.63%	\$38.00	10.53%	\$42.00	14.29%	\$48.00	14.58%	\$55.00
Marketing Automation Software	\$3.00	133.33%	\$7.00	42.86%	\$10.00	50.00%	\$15.00	33.33%	\$20.00	-10.00%	\$18.00	5.56%	\$19.00	7.89%	\$20.50	7.32%	\$22.00
TOTALS	\$389.50	10.14%	\$429.00	-14.92%	\$365.00	3.56%	\$378.00	6.35%	\$402.00	-6.47%	\$376.00	9.31%	\$411.00	11.07%	\$456.50	12.16%	\$512.00

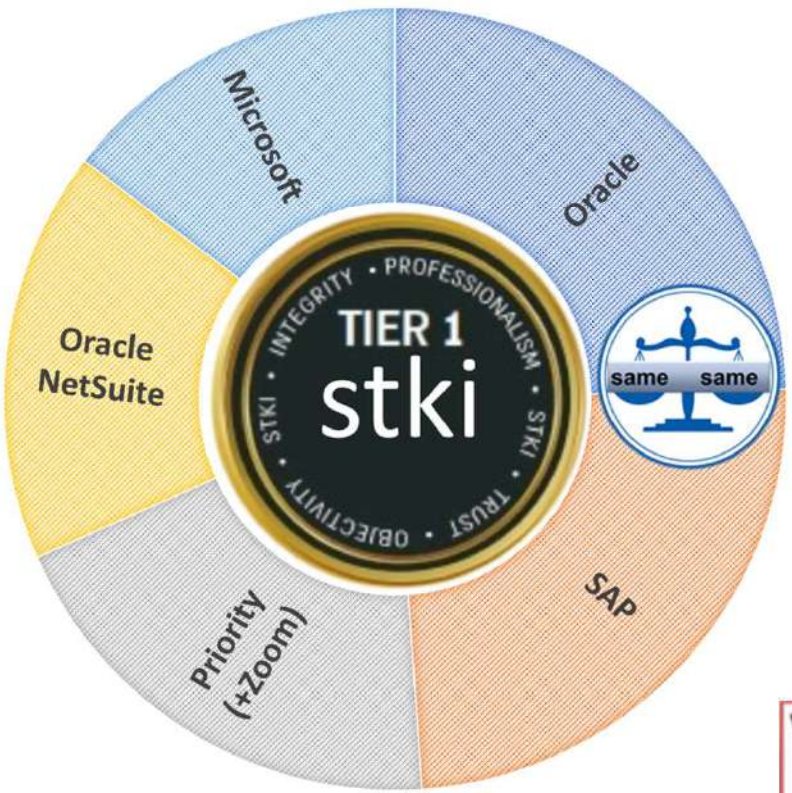
Values in Million USD



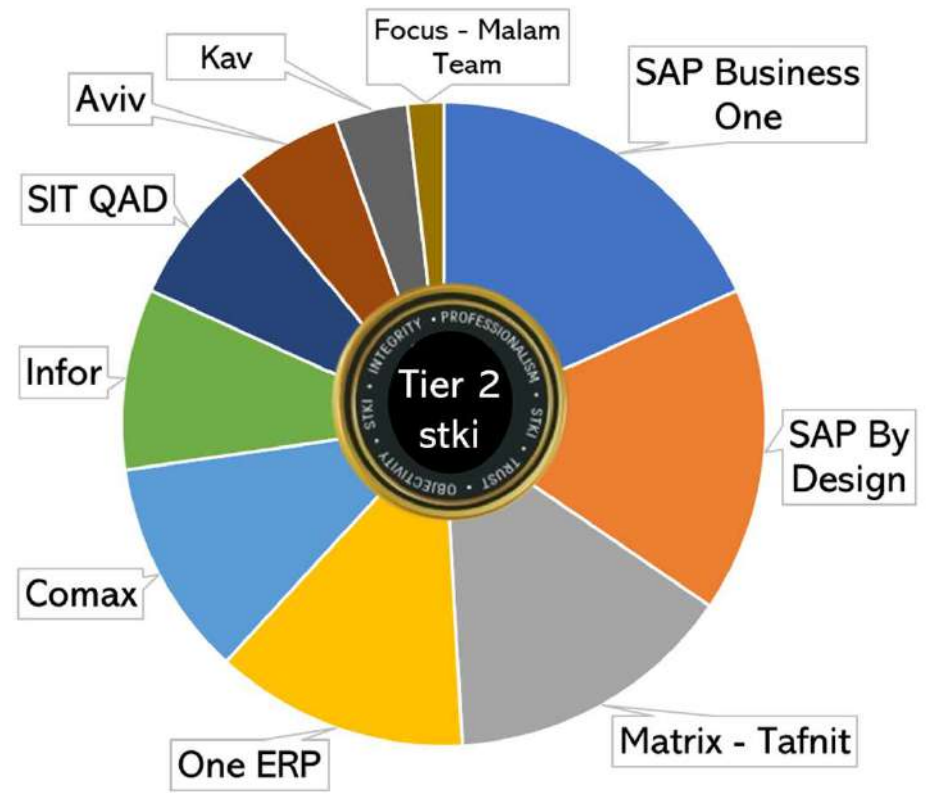
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ERP Packages



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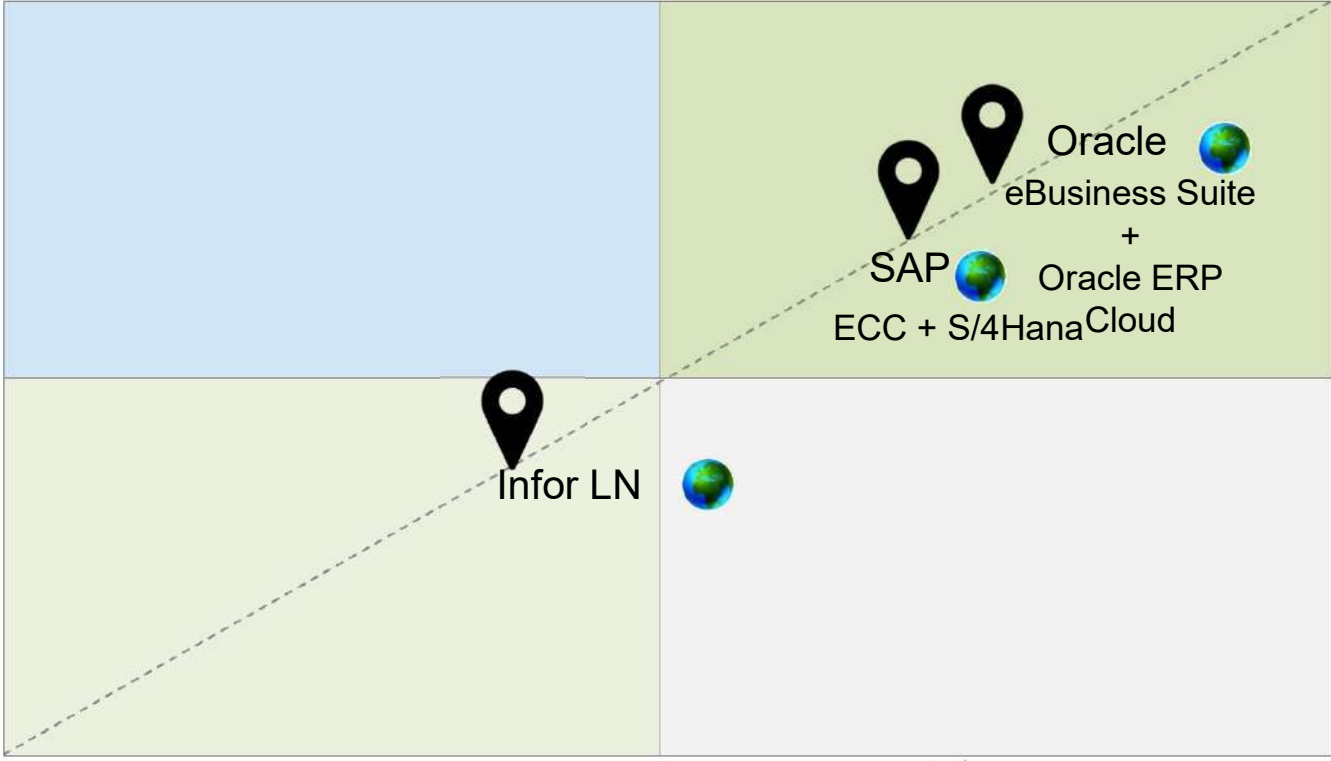
Enterprise ERP 2024 > 10K Users

Presence & Support in Israel



Global Leader

Local Support



Market Presence



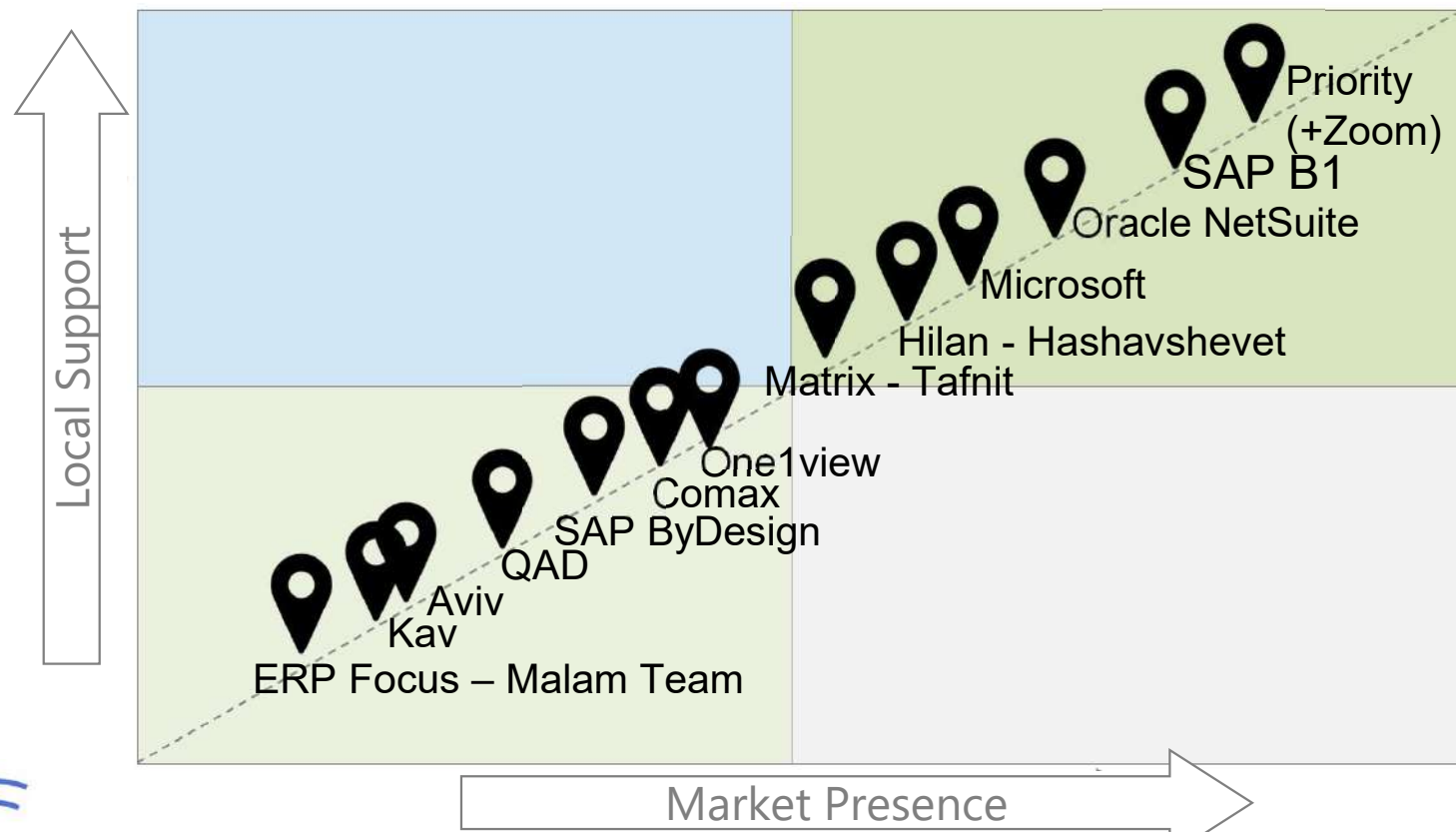
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Mid-Market ERP 2024 Up to 10K Users

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ERP Integrators Part 1

★ New Category

Package	Israel Rep	Integrators
Oracle Fusion Cloud ERP Netsuite e-Business Suite	Oracle Israel	<p>Oracle Fusion: Oracle consulting, One1, Yael Group, PwC, Accenture, Deloitte, Top Group, Analytical factor, Emet- Unitask</p> <p>Oracle Netsuite: Netcloud, One1, Deloitte ,PwC, Top Group, WinIT, Zu Consulting, SuiteTech, Bsuite, iCloudius</p> <p>Oracle eBusiness Suite: Yael Group, DXC, PwC, TATA (TCS Israel), ONE1</p>
SAP	SAP	Hilan-Ness, ONE (Teldor+Xact + Advantech), Malam-Team, Deloitte, PwC, TATA (TCS Israel), Accenture, abra, Kyndryl, Inford-Team
★ SAP Rise		Deloitte, Accenture, Pwc, EY, One1, Malam-Team, Hilan-Ness, KPMG
★ SAP Grow		Hilan-Ness, Deloitte, ERP Logic, KPMG, Alfacloud, Allegro-Pro
SAP By Design		Alfacloud, Malam-Team (Seidor), ERP Logic, abra
SAP Business One		Top Group (Ziv Systems + RELS, Xioma), Complete, Menahel4U, B-top, Nayax, Rapid-Image, Logical
E-Tafnit, Tafnit 7	Matrix	Matrix, Alpha Consultants
QAD EE	SIT	SIT, ManofIT, Tirosch
Priority	Priority	Matrix - Medatech, One1 - FBC, Agrosoft, EDP, eBase, Pioricity, EliteERP, Infobase, Gap, Tirosch, 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



software market



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ERP Integrators – Part 2

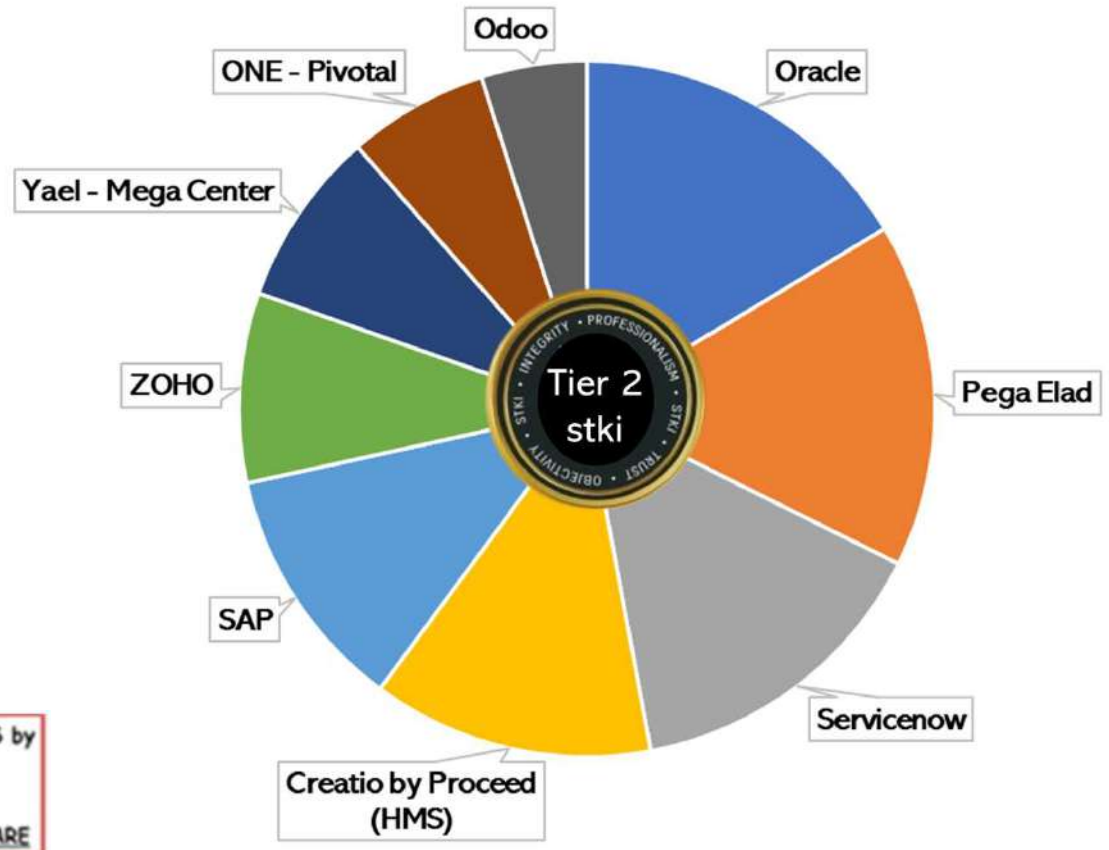
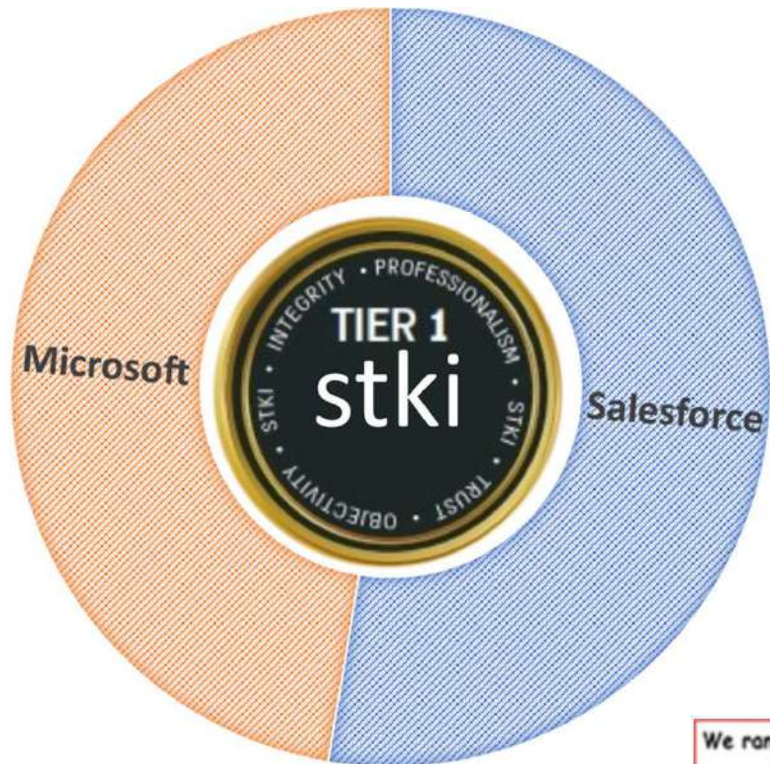
Package	Israel Rep	Integrators
Microsoft Dynamics AX	Microsoft Israel. abra	abra , Oregano, MCS, Biz Aid
Microsoft Dynamics NAV		abra, Dover Applications
FinPro, Logistic Pro	Almog	Almog
KAV systems	Kav	Kav, Ardom
Aviv, MARS	Aviv	Aviv
Gan Tochnot Heshev (Kibbutzim) Azimut (Car) ERP Plus (cross-sector)	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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REVENUE
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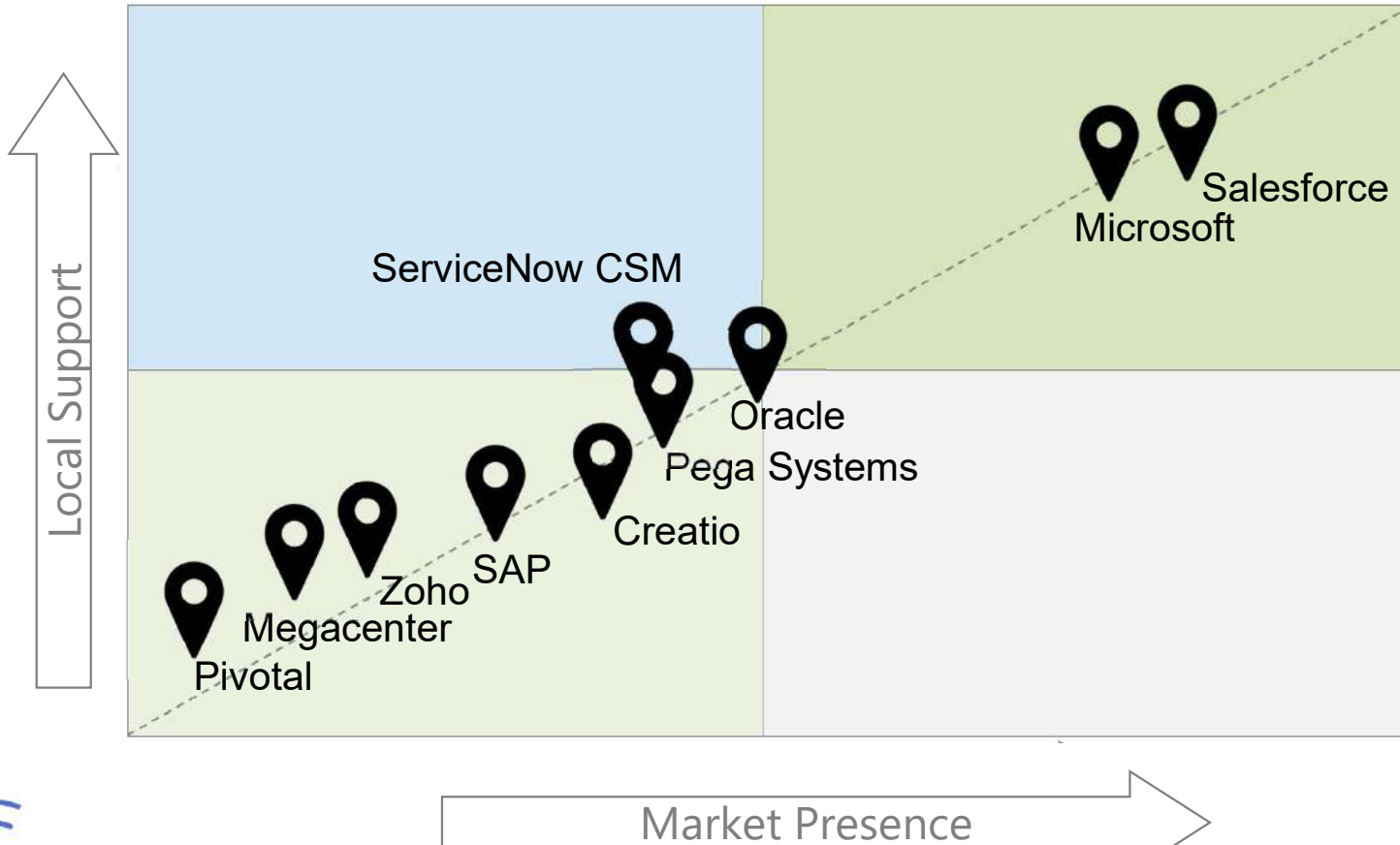


CRM Platforms 2024

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Odoo
Freshworks
Oro CRM



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CRM Packages (embedded AI) in Israel - Part 1:

Package	Israel rep.	Integrators	Embedded AI
Oracle Sales & Service Cloud	Oracle Israel	Oracle Consulting, Yael, one, Deloitte	AI for CX
Oracle – Siebel		Yael, TCS, Matrix	
Oracle - Peoplesoft		Matrix	
Salesforce	Salesforce Israel	AllCloud, Elad Yael (Cloudtech), iClou dius, one, Accenture, Delloite, Malam-Team, Accenture, MYND, Matrix, EMET WeDo, abra, Aman-Asperi, PWC	Einstein AI Einstein co-pilot
Microsoft CRM 365	Microsoft Israel	Elad, Matrix, Malam-Team, Hilan-Ness, abra, Biz Aid, Softpro, MYND	Dynamics 365 Co-Pilot
ServiceNow CSM Service and Sales/OM	ServiceNow	one (Dicomano), Ness TSG, Bizflow, Bynet, Deloitte, Thirdera	Now Platform



CRM Packages 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 V2		abra, SAP services
MEGA Center	Yael	Yael
Pivotal	one	one
Odoo	Lalynetech	Lalynetech
Freshworks	Malam-Team	Malam-Team, Matrix
Oro	abra	abra
Pega	Elad	Elad
Creatio	Proceed (HMS)	Proceed (HMS), Shita
Hubspot CRM		
Zoho CRM		Tamayo, Holistic



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Multi Channel Platforms

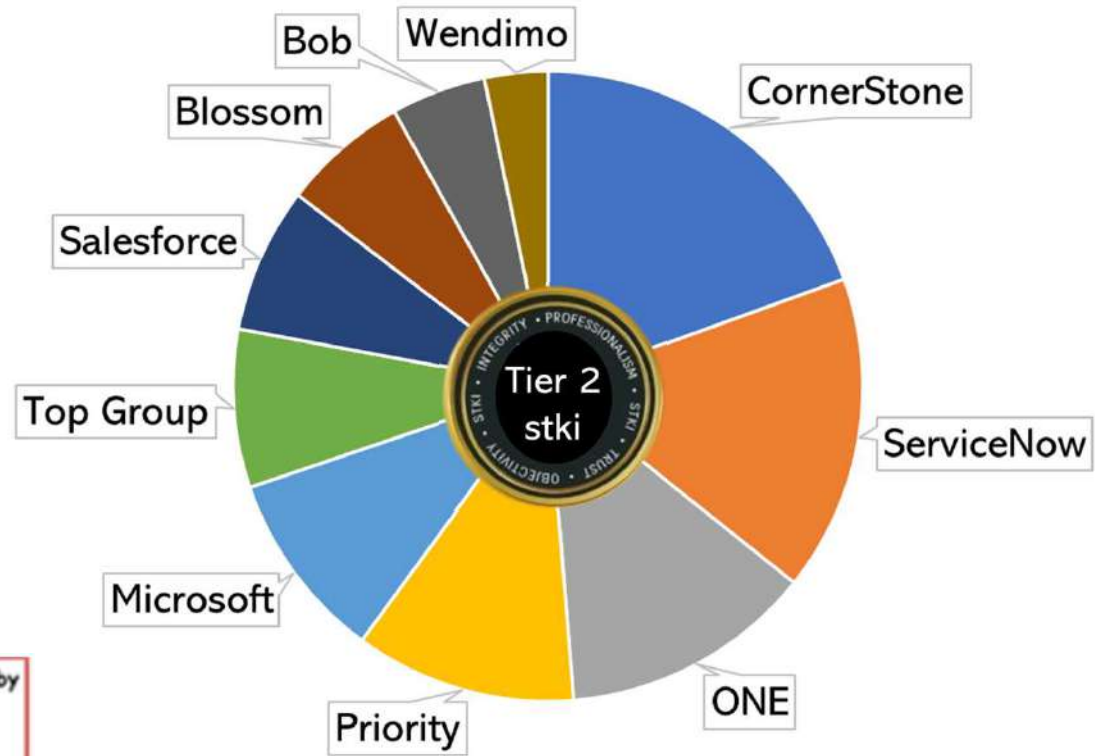
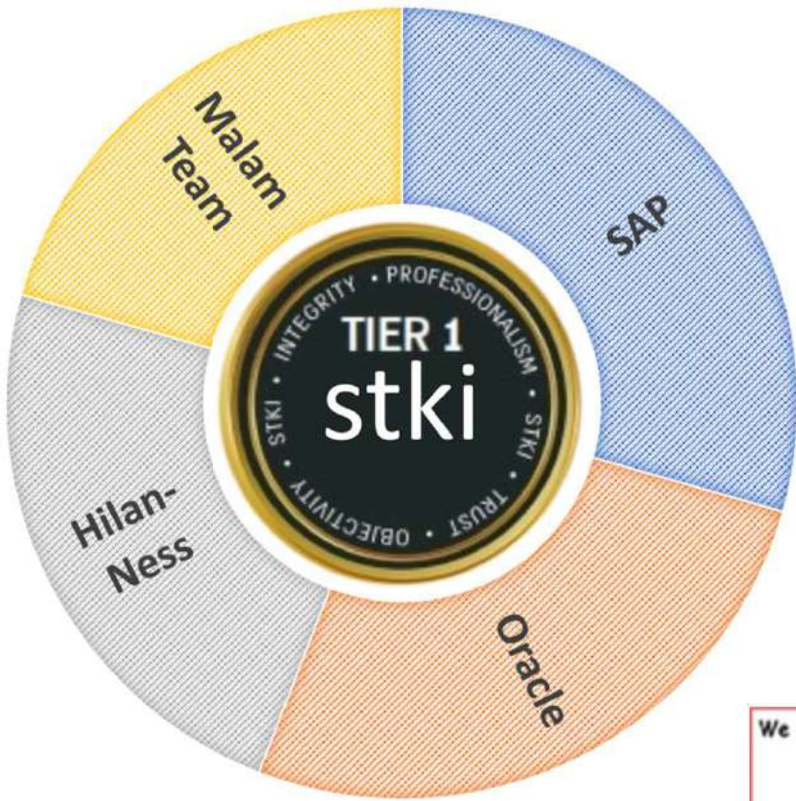
Package	Israeli Rep.	Integrators	
Twilio	Aman, I.E Mittwoch	Aman, I.E Mittwoch	} CPaaS
Vongae (Nexmo)		KPMG Edge	
Commbbox	Commbbox	Commbbox PS	} Standalone multi channel
7Twenty	7Twenty	Matrix	
Glassix	Consist	Consist, Elad, Matrix	
99Digital	99Digital	99Digital, Bynet - Partner	
Consolto		Matrix	
Simplechat* (for Microsoft CRM on premise)	Elad	Elad	} Part of CRM
Microsoft Multi Channel	Microsoft Israel	Matrix, Elad, abra, Biz Aid, Malam-Team	
Salesforce Digital Engagement	Salesforce Israel	one, Aman Asperi, Elad...	



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HR/ Talent Mgmt./ LMS APPLICATIONS



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REVENUE
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CLIENT MINDSHARE

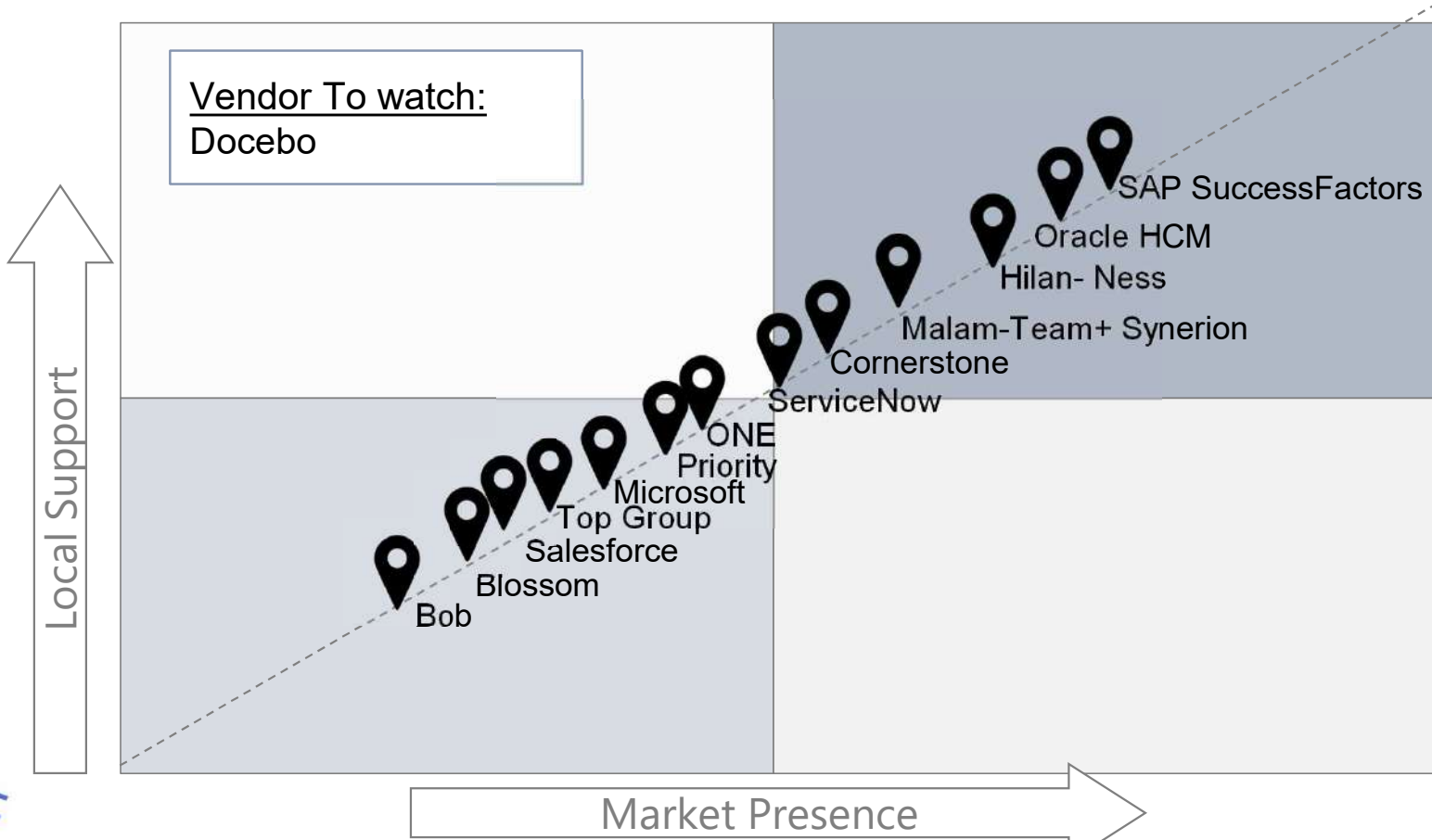


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HR, Talent Management, Payroll and LMS 2024

Presence & Support in Israel



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HR, Talent Mng. Payroll and LMS

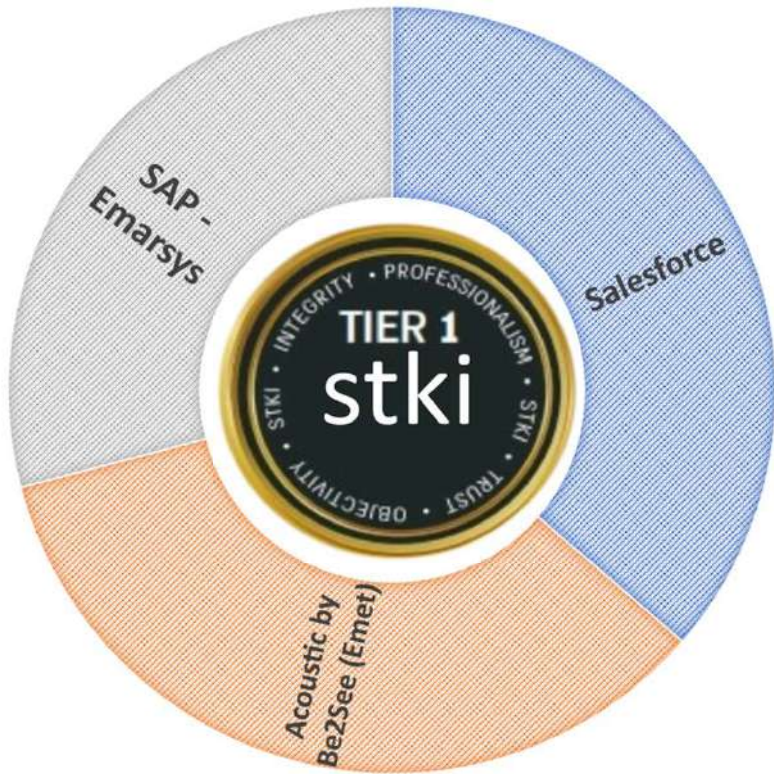
Package	Category	Rep. in Israel	Integration partners
Oracle, HCM	Core HR, Payroll, Talent Mng.	Oracle Israel	Emet- Unitask, Oracle, Malam-Team
SAP HR, SAP Successfactors, Nakissa, Workforce Analytics, WPB, Litmos, SAP Experience Management (XM)	Core HR, Payroll, Talent Mng, Org. Chart	SAP Israel	AKT,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



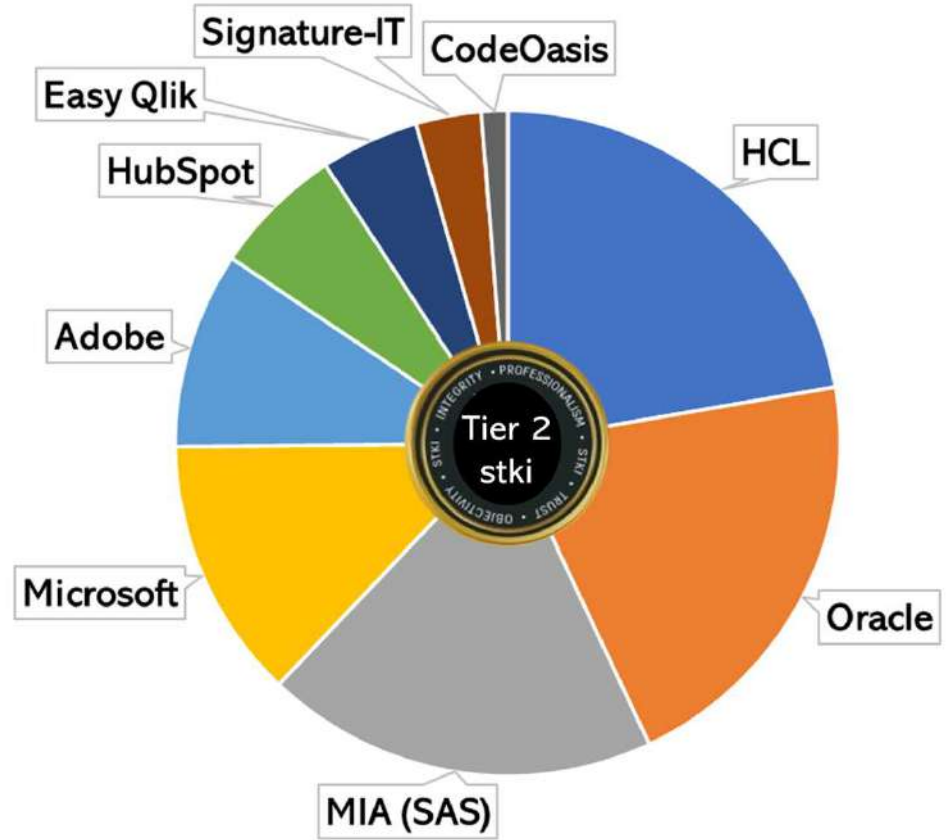
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Marketing Automation Software



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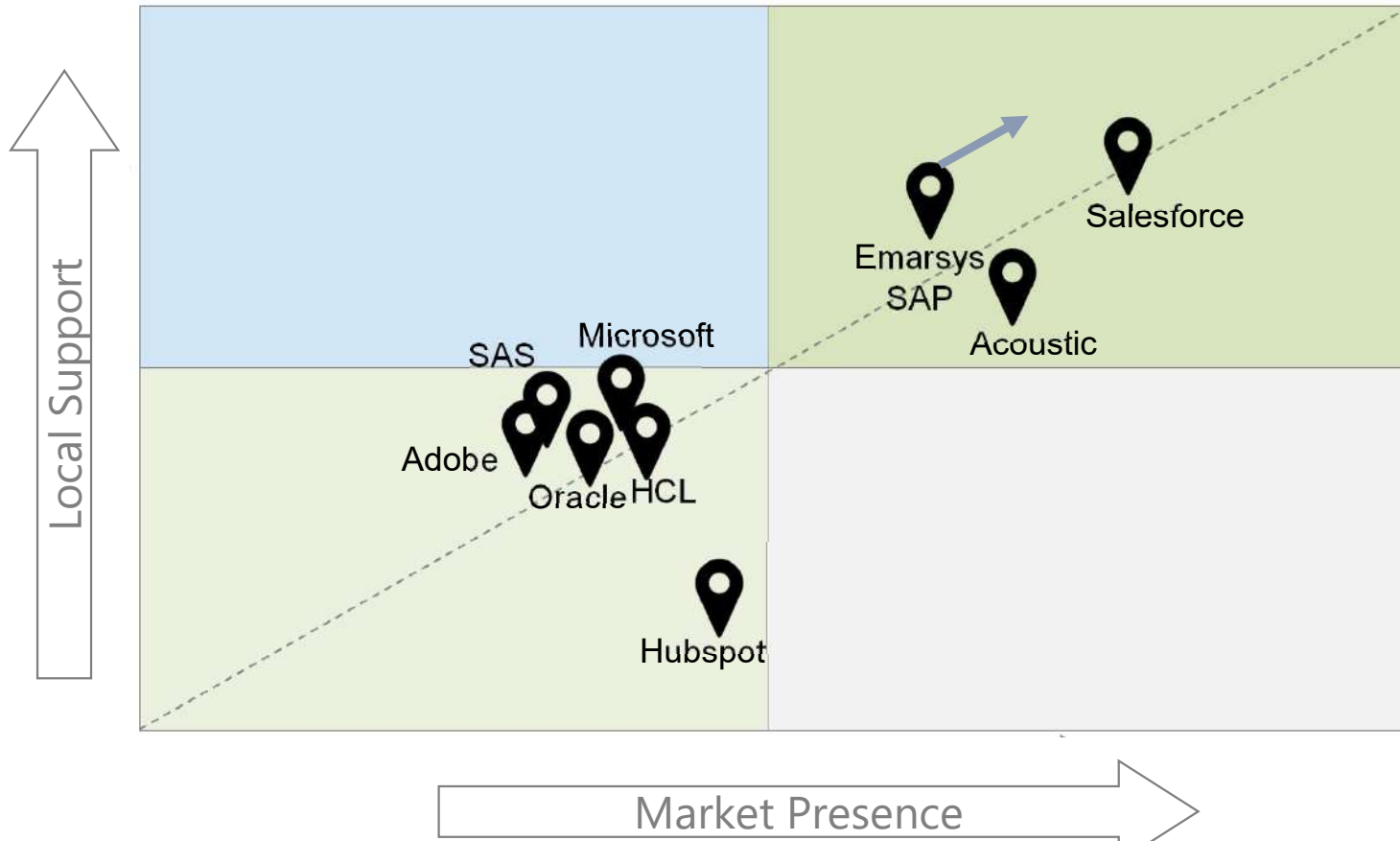


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Marketing Automation Suites – 2024

Presence & Support in Israel



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CM and Marketing Automation Platforms – Part 1

Package	Israel rep.	Integrators
Salesforce Marketing Cloud	Salesforce Israel	Deloitte (+ Weku), Weku, Elad, AllCloud, Yael, Bay Bridge Digital, abra, one, Matrix, Data-Pro, Inferow, Techunity, Raveh solutions
Acoustic	Be2see (Emet Group)	Be2see (Emet Group)
HCL: Unica Journey	Be2see (Emet Group)	Be2see (Emet Group)
HCL: Unica Campaign Management		Be2see (Emet Group), Gstat, Yael
Adobe (+Marketo)	Adobe Israel	Deloitte
SAS CI 360	Mia computers (SAS)	Yael
Oracle	Oracle Israel	Yael, iCloudius
Microsoft Customer Journeys	Microsoft Israel	abra, Matrix, Elad, Biz Aid, Malam-Team



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CM and Marketing Automation Platforms – Part 2

Package	Rep. in Israel	Integrators
SAP Emarsys Engagement Platform	SAP Israel	<u>Emarsys</u> : SAP Israel, Be2see, one-Saban, abra
Hubspot		Agencies
Pega Marketing Automation	Elad	Elad
SalesManago	Signature-IT	Signature-IT



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Personalization tools

Package	Rep. in Israel	Integrators
Insider (Multichannel personalization)	Be2See (Emet)	Be2See (Emet)
Maxymiser	Oracle Israel	
Dynamicsyield		
Adobe Target	Adobe Israel	Deloitte Israel
Sap Emarsys customer engagement platform	SAP Israel	



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Customer Data Platforms (CDP) Players in Israel

Company	Product	Partners
SAP	CDP	Be2see, AKT, one - Saban
SAP	CDC (Cloud Data Customer)	Be2see
Adobe	CDP Real Time CDP	Deloitte Israel
Oracle	CX Unity	Oracle Consulting
Microsoft	Customer Insights	MSFT partners
Salesforce	Data Cloud	SF partners
Zigit (SQLink)	CIP :Customer Intelligence Platform	SQLink



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Business Application Systems Market 2018-2026

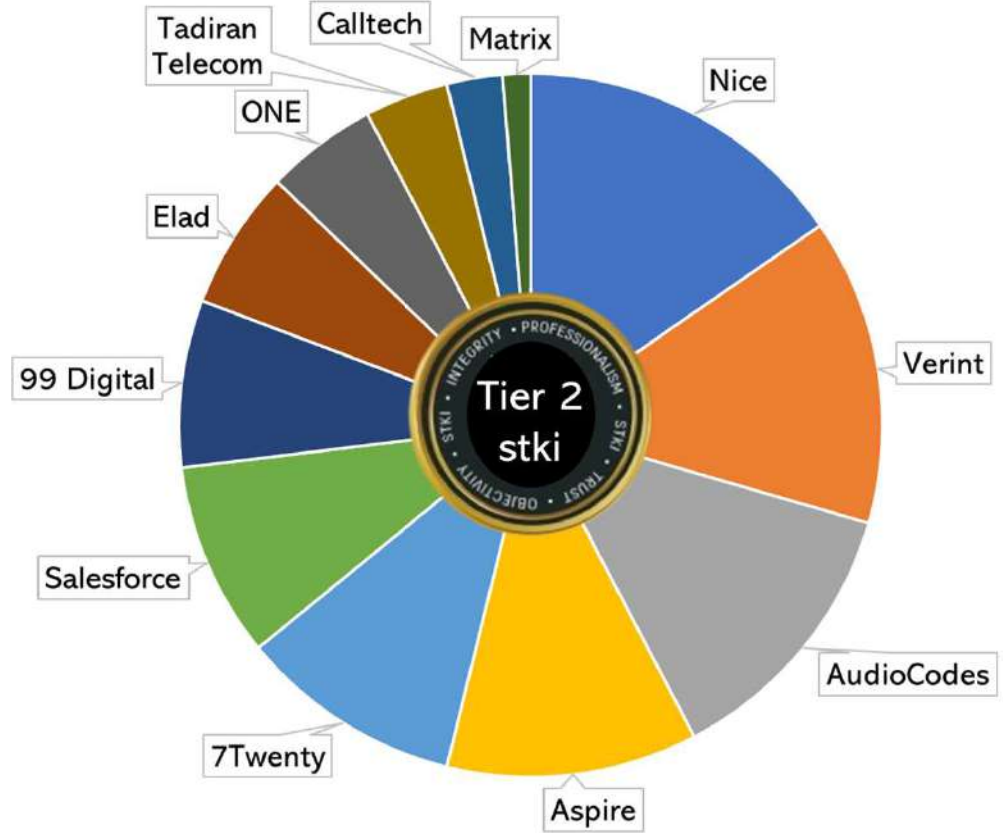
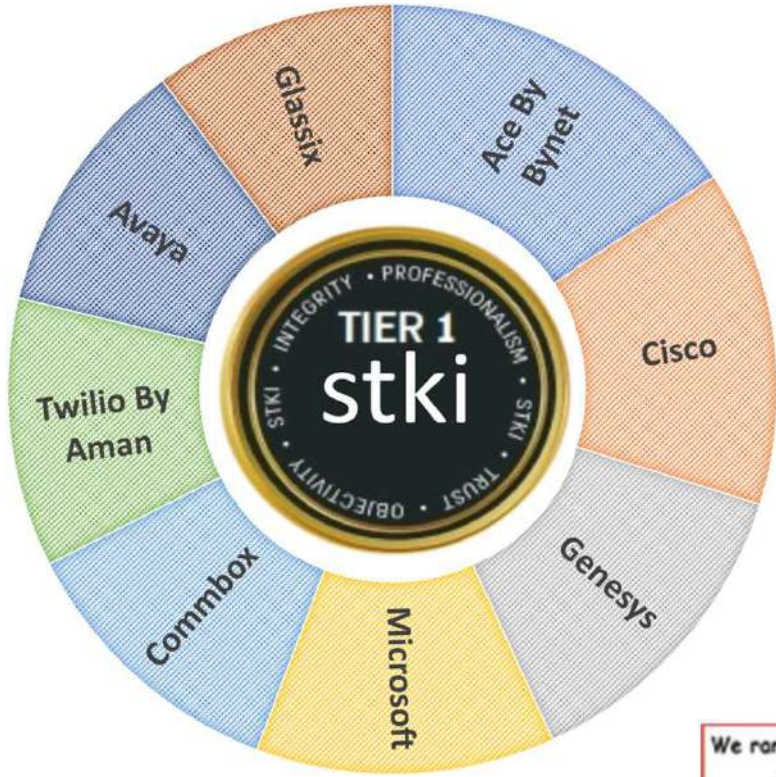
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc....)	\$29.00	17.24%	\$34.00	47.06%	\$50.00	16.00%	\$58.00	6.90%	\$62.00	-19.35%	\$50.00	8.00%	\$54.00	11.11%	\$60.00	11.67%	\$67.00
E-Commerce and Marketplace Platforms	\$1.00	150.00%	\$2.50	300.00%	\$10.00	50.00%	\$15.00	33.33%	\$20.00	-25.00%	\$15.00	-20.00%	\$12.00	33.33%	\$16.00	25.00%	\$20.00
Web Content Management Platforms	\$10.00	85.00%	\$18.50	8.11%	\$20.00	7.50%	\$21.50	-6.98%	\$20.00	-15.00%	\$17.00	11.76%	\$19.00	15.79%	\$22.00	18.18%	\$26.00
PLM Systems					\$5.00	100.00%	\$10.00	60.00%	\$16.00	-6.25%	\$15.00	6.67%	\$16.00	18.75%	\$19.00	21.05%	\$23.00
Blockchain platforms	\$5.00	30.00%	\$6.50	-23.08%	\$5.00	6.00%	\$5.30	9.43%	\$5.80	-65.52%	\$2.00	50.00%	\$3.00	100.00%	\$6.00	50.00%	\$9.00
RPA Platforms	\$0.00		\$20.00	15.00%	\$23.00	17.39%	\$27.00	25.93%	\$34.00	11.76%	\$38.00	18.42%	\$45.00	17.78%	\$53.00	13.21%	\$60.00
BPM Platforms	\$4.00	75.00%	\$7.00	185.71%	\$20.00	20.00%	\$24.00	16.67%	\$28.00	-28.57%	\$20.00	15.00%	\$23.00	17.39%	\$27.00	18.52%	\$32.00
IOT tools and platforms	\$1.50	133.33%	\$3.50	42.86%	\$5.00	60.00%	\$8.00	25.00%	\$10.00	50.00%	\$15.00	26.67%	\$19.00	26.32%	\$24.00	25.00%	\$30.00
TOTALS	\$50.50	82.18%	\$92.00	50.00%	\$138.00	22.32%	\$168.80	16.00%	\$195.80	-12.16%	\$172.00	11.05%	\$191.00	18.85%	\$227.00	17.62%	\$267.00

Values in Million USD



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



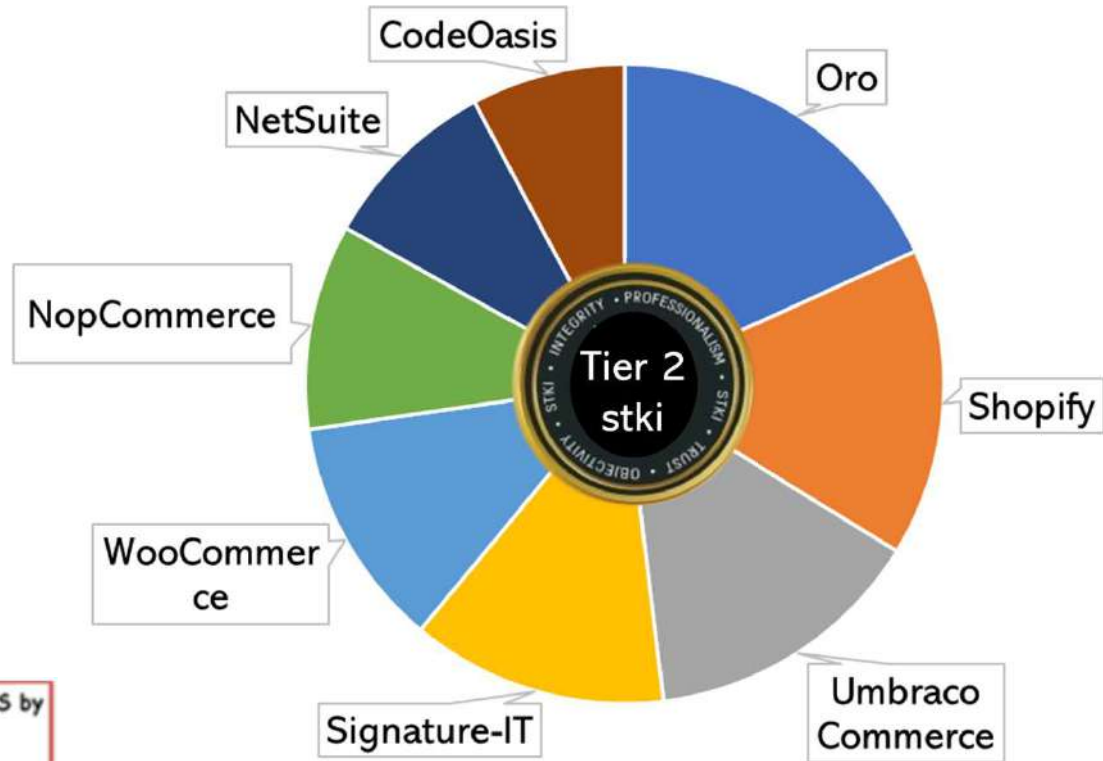
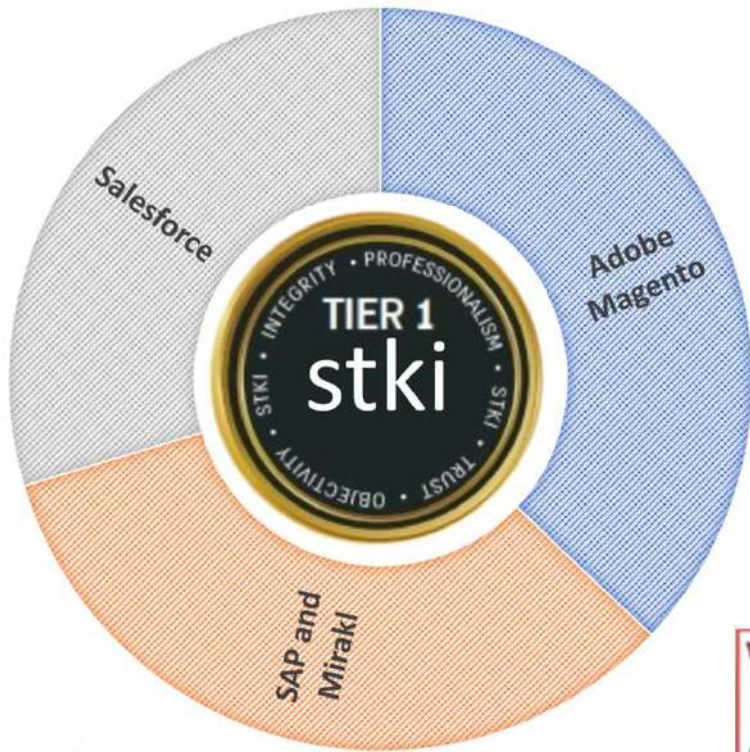
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E-Commerce & Marketplace Platforms



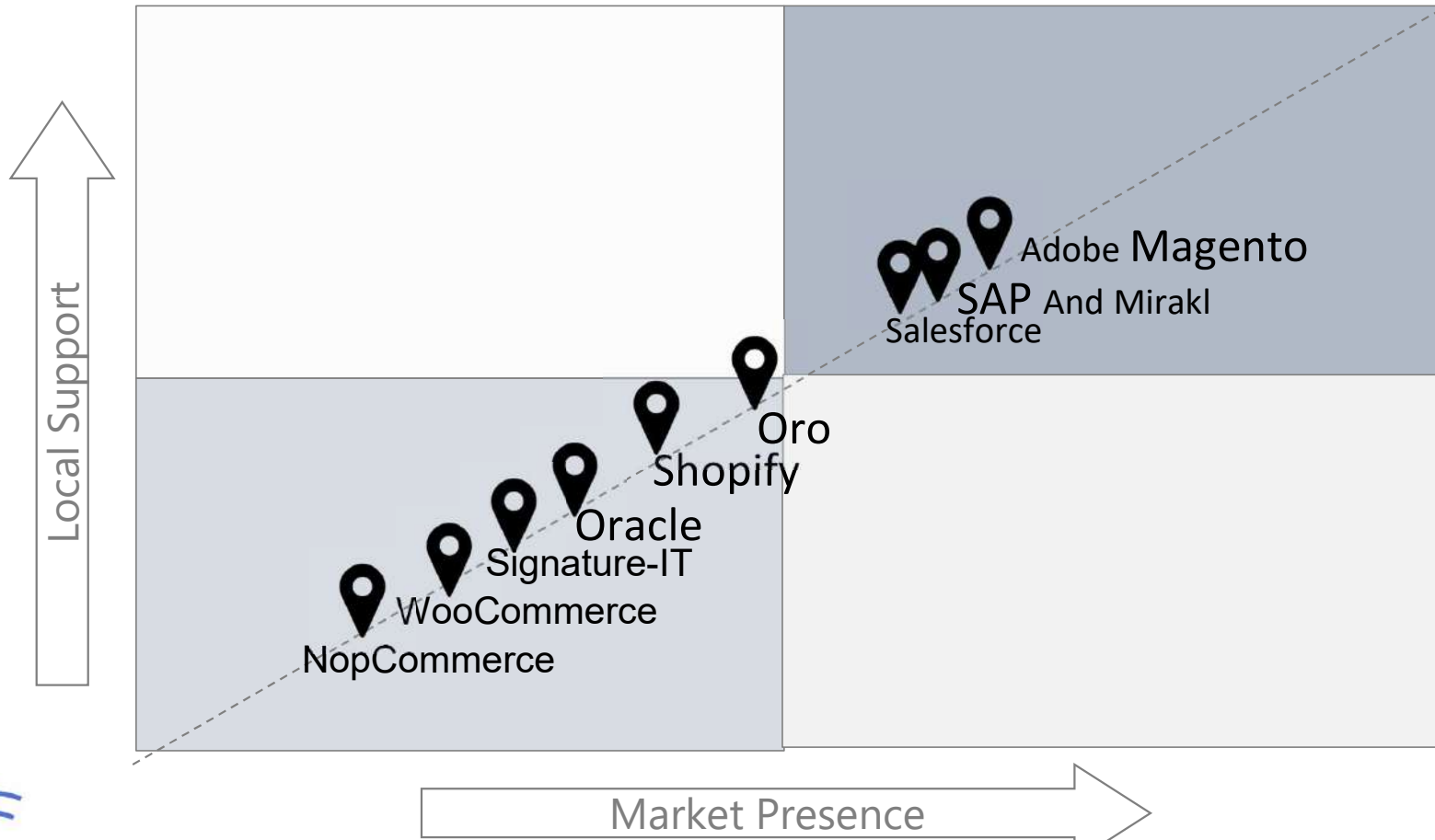
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eCommerce and Marketplace - 2024



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e-Commerce packages in Israel – Part 1



Package	Rap/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)	Signature-IT, 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, Signature-IT







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e-Commerce packages in Israel- Part 2

Package	Rap/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, Zigit(SQLink)
 Umbraco Commerce	Elad, Hilan-Ness, Aman, Ewave, Matrix, Tvuna(SQLink)
Site Vision	Malam-Team (Pionet)
 Akeneo (PIM)	Elad
Oro	abra, Yael, Ness, CodeOasis

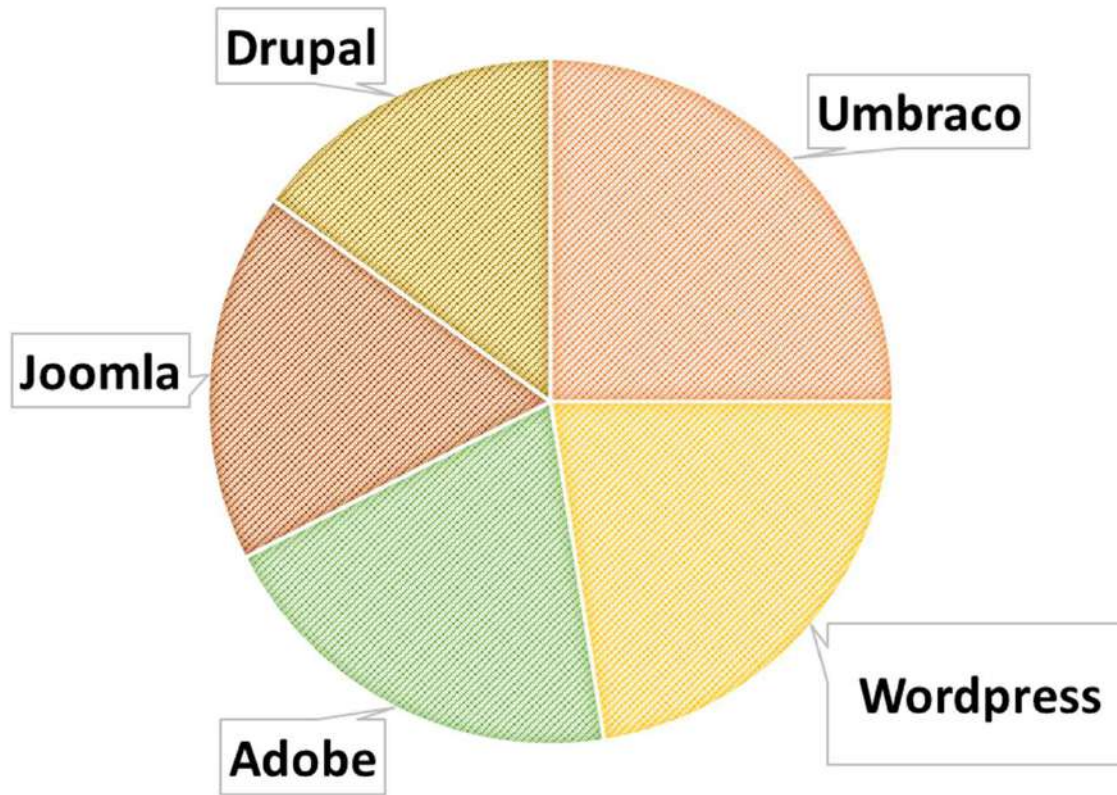
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Web Content Management Platforms

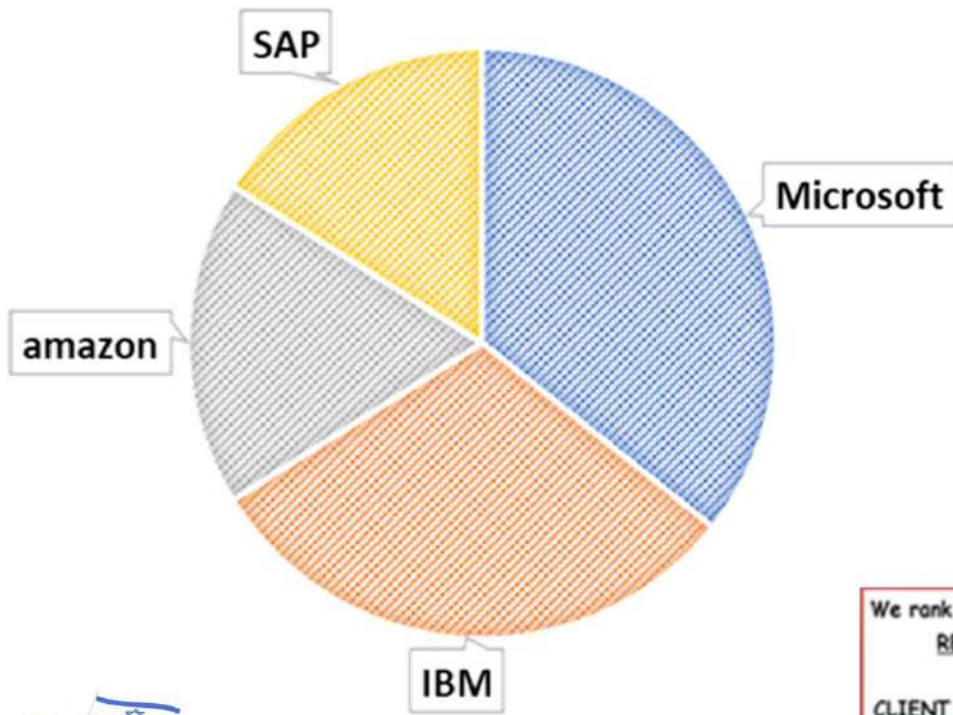


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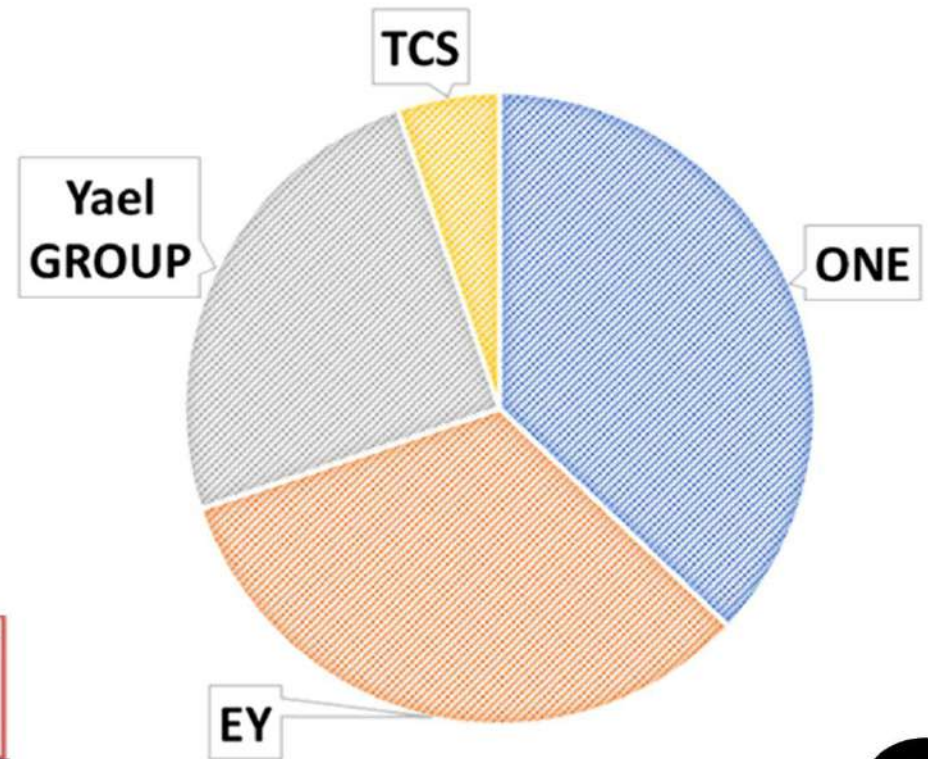


Blockchain Platforms & VARS

Platforms



VARs

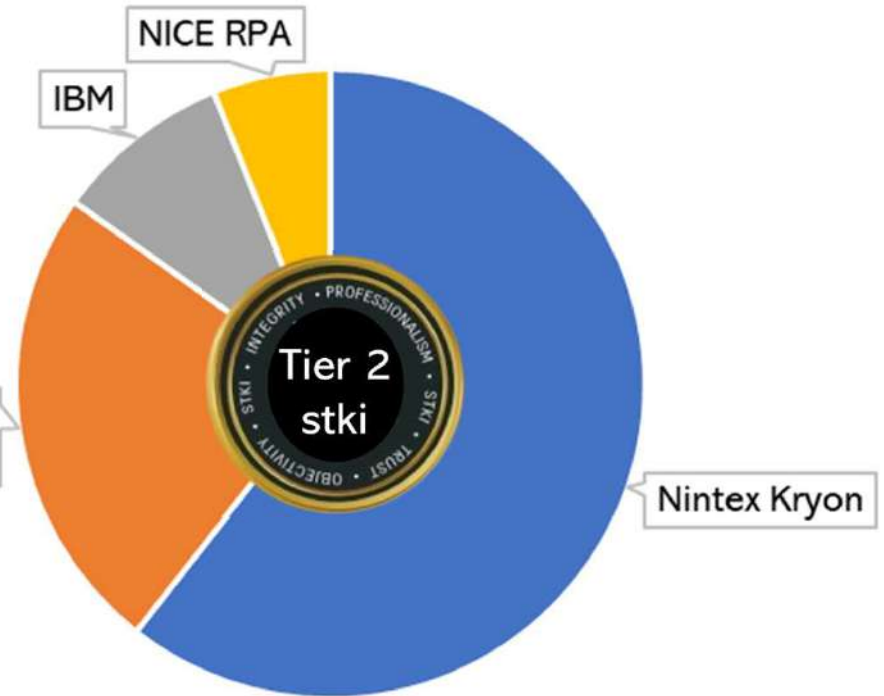


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RPA Platforms



AUTOMATION ANYWHERE

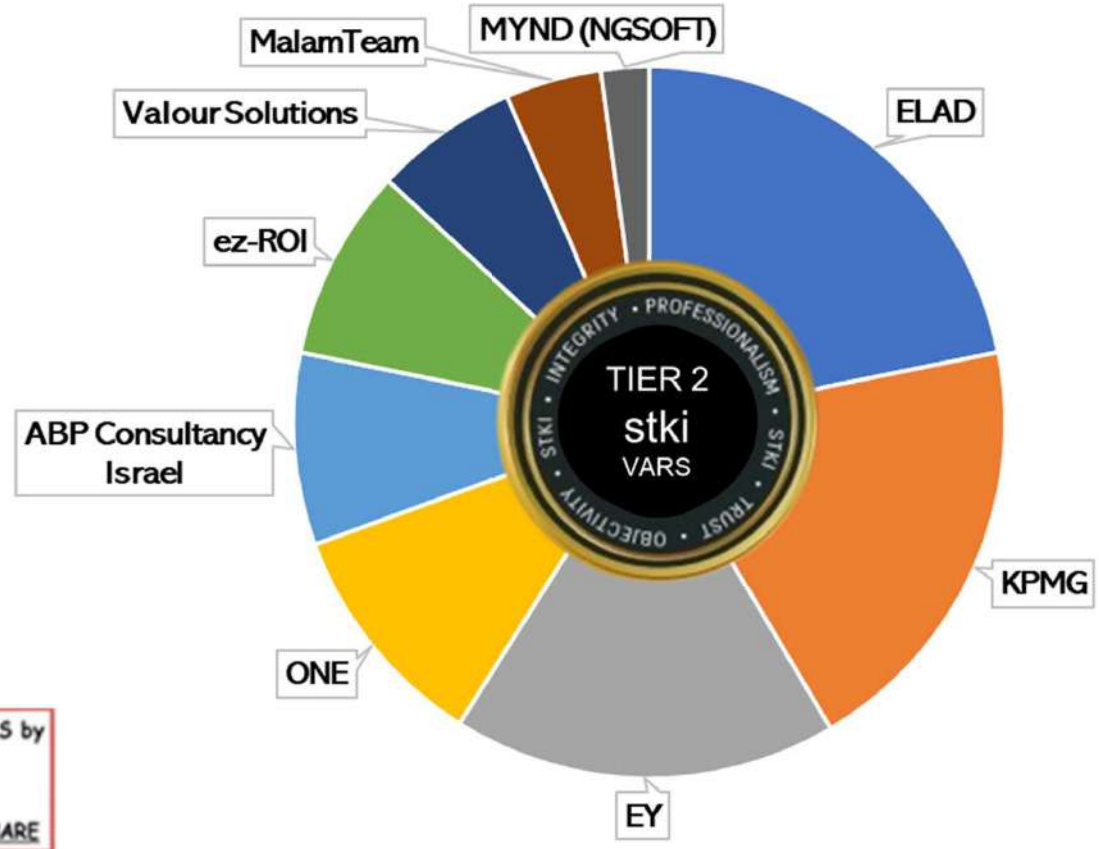
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RPA Platforms VARS



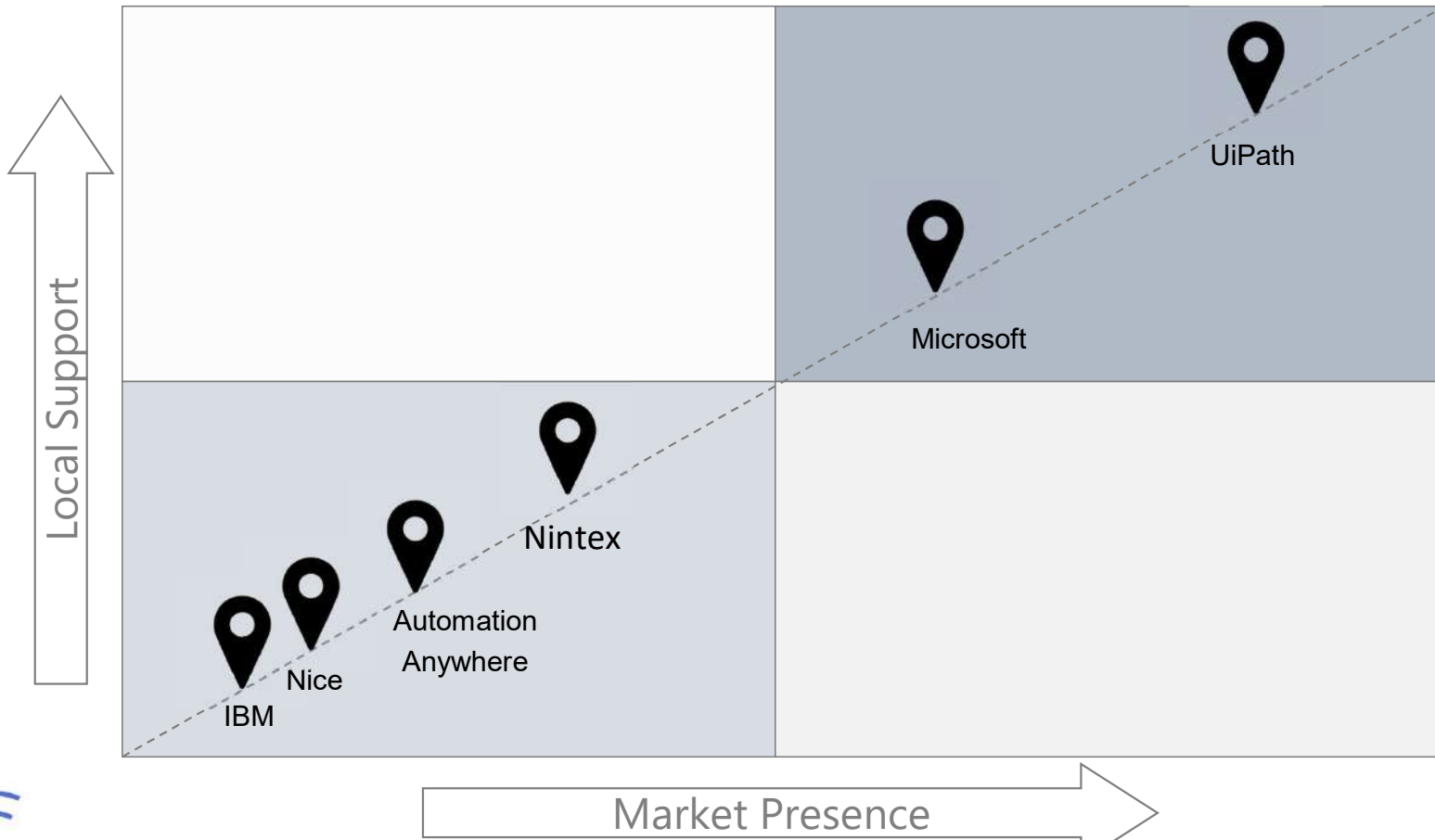
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RPA- Israeli Market Positioning-2024



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RPA Tools & Integrators in Israel 2024

	Integrators
UiPath	HMS, EY, KPMG, Valor, ABP, Ness, Aman, Matrix, IBM
Microsoft RPA (Power Automate)	Malam, Matrix, Ness, Elad, KPMG, BizAid
Nintex RPA (Formerly Kryon RPA)	Galil Software, EY, KPMG, EZ ROI, Matrix
Automation Anywhere	EY, KPMG, Yael, Matrix, Ness, Bynet
NICE RPA	Deloitte, Valor
IBM RPA (Cloud Pak for Business Automation)	IBM Expert Labs, ABP, Malam, Matrix



Global leader

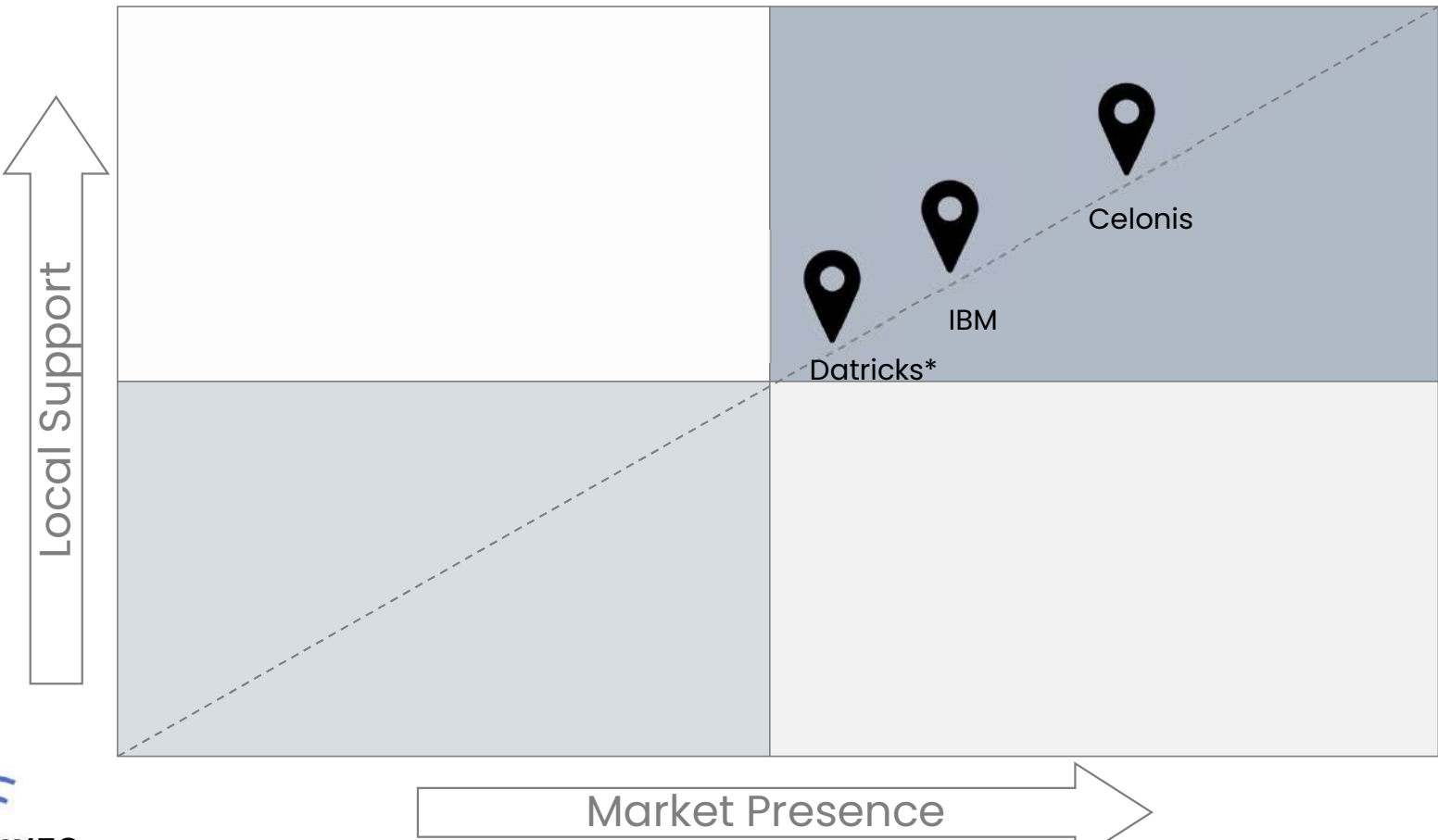


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Process Mining 2024

Israeli Market Positioning








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Process Mining Tools & Integrators in Israel 2024

 Global leader

	Clients	SaaS/ On-Premise	Integrators
Celonis 	ICL, Mekorot	SaaS/On-Premise (partial features)	ERGO
IBM	ELAL	SaaS/On-Premise	IBM Expert Labs, ABP, Malam, Matrix
ARIS Process Mining 	-	SaaS	Software AG
Datricks* (Financial Integrity Platform)	Netafim, Teva, ICL, Phoenix, CyberArk	SaaS/On-Premise	Datricks, SAP
Pegasystems 		SaaS	Elad
UiPath 	-	SaaS/On-Premise	HMS
SAP Signavio		SaaS/On-Premise	SAP, SAP integrators
Microsoft Power Automate 	-	SaaS	Malam, Matrix, Ness, Elad, KPMG, BizAid




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Process Mining Tools & Integrators in Israel 2024



	Clients	SaaS/ On-Premise	Integrators
Kofax Insight			Aman
ABBYY 	-	SaaS/On-Premise	Software Sources

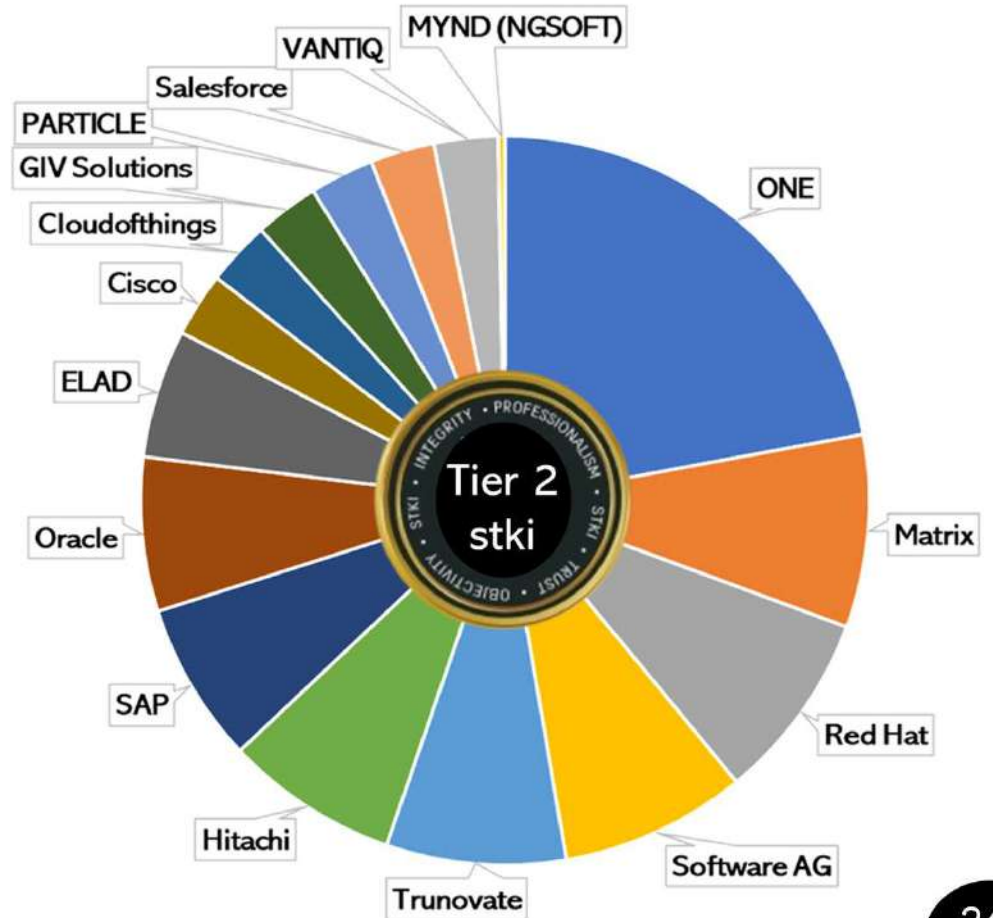
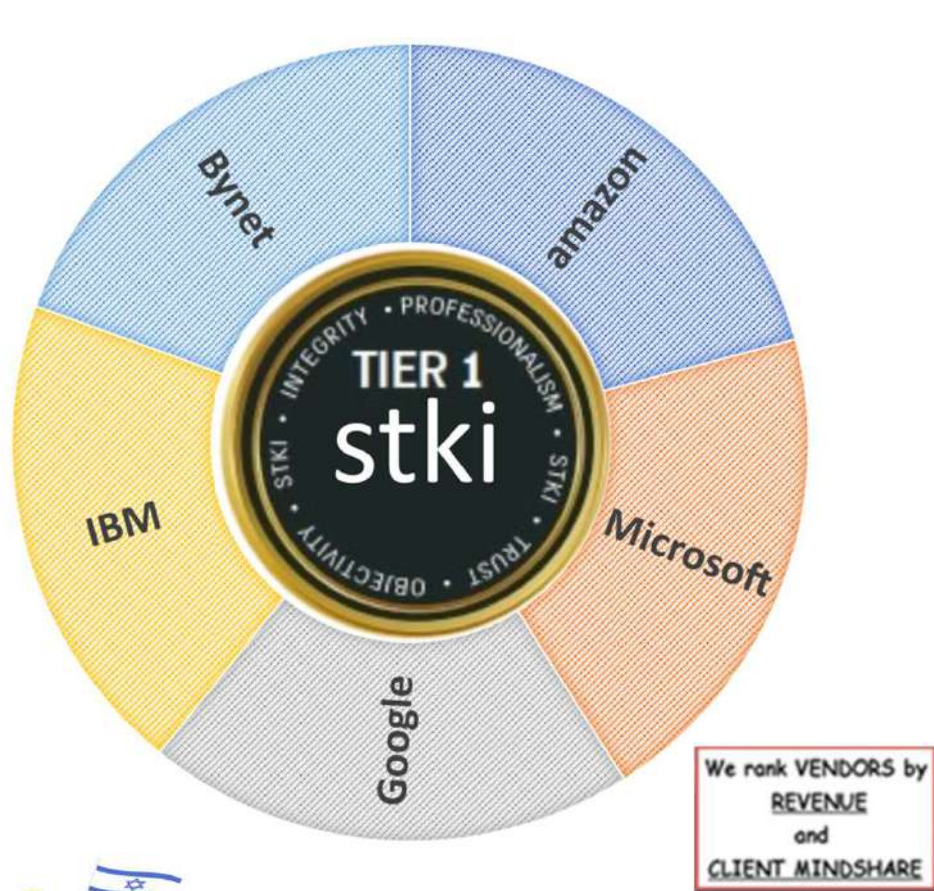
 Global leader



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IoT Tools and Platforms



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Industry Specific and Special Purpose Applications Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
GIS, WMS, transportation tools	\$100.00	10.00%	\$110.00	-22.73%	\$85.00	17.65%	\$100.00	20.00%	\$120.00	12.50%	\$135.00	11.11%	\$150.00	13.33%	\$170.00	11.76%	\$190.00
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	-20.00%	\$80.00	12.50%	\$90.00	11.11%	\$100.00	15.00%	\$115.00
TOTALS	\$180.00	11.11%	\$200.00	-25.00%	\$150.00	20.00%	\$180.00	22.22%	\$220.00	-2.27%	\$215.00	11.63%	\$240.00	12.50%	\$270.00	12.96%	\$305.00

Values in Million USD



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Israel

Value Added Services Markets 2024 "vendor rankings"



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



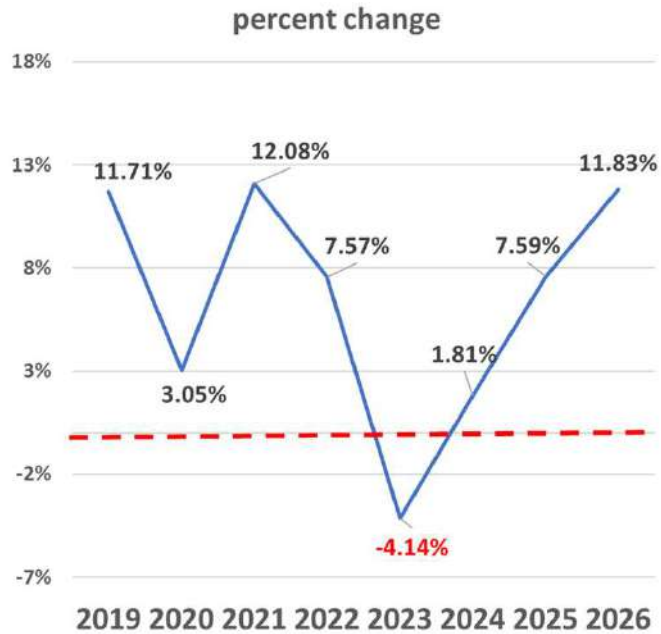
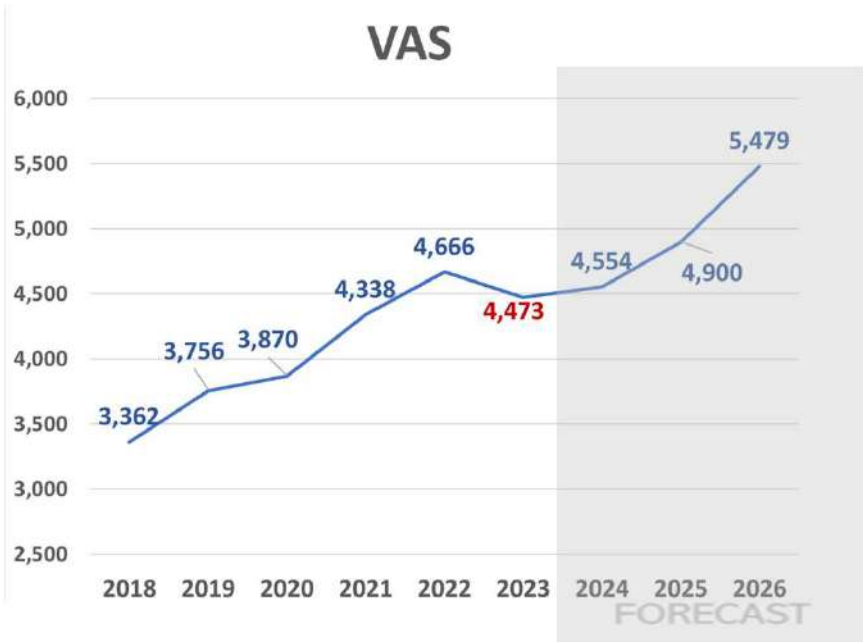
GenAI Analyst

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

STKI Research Team



Value Added Services Market 2018-2026



Values in Million USD

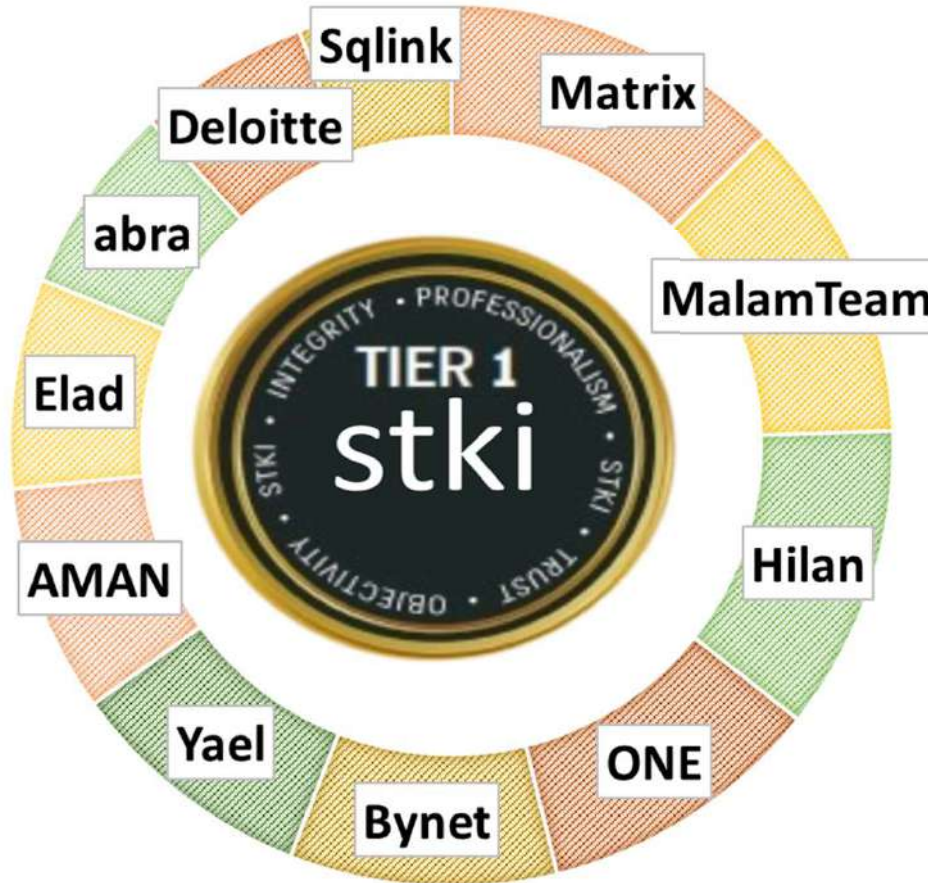
2018	2019	2020	2021	2022	2023	2024	2025	2026
\$3,362.00	\$3,756.00	\$3,870.00	\$4,338.00	\$4,666.00	\$4,473.00	\$4,554.00	\$4,900.00	\$5,469.00
	11.71%	3.05%	12.08%	7.57%	-4.14%	1.81%	4.59%	11.64%



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TOP VENDORS: Value-Added Services Markets



We rank VENDORS by
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VAS CATEGORIES (pages)

consulting
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3rd party maintenance
page: 263

Infra Projects on-prem
page: 266

Cloud Infra Projects
page: 273

Project mgmt. & development tools
page: 276

enterprise swre implementation
page: 278

data, analytics AI & BI
page: 287

Business applications (dev & implementation)
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Innovation Projects
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testing, training, fruition & hatmaa
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EGRC & Regulation
page: 317

Outsourcing & Managed Services
page: 321

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

f graph



"Enterprise" Consulting Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
IT Strategy Consulting	28	5.45%	29	13.79%	33	12.12%	37	10.81%	41	-4.88%	39	-5.13%	37	-5.41%	35	2.86%	36
Organizational Transformation Consulting (organizational models, change mgmt, product mng consulting, agile consulting, methodologies etc.)	14	7.14%	15	20.00%	18	27.78%	23	21.74%	28	-14.29%	24	-12.50%	21	-4.76%	20	10.00%	22
Data & AI Strategy Consulting (organizational data structure, methodologies, data architecture planning, finding use cases, literacy)	10	36.84%	13	53.85%	20	40.00%	28	7.14%	30	-6.67%	28	-3.57%	27	3.70%	28	7.14%	30
IT Infrastructure & Cloud Consulting	13	3.85%	14	33.33%	18	27.78%	23	21.74%	28	-10.71%	25	8.00%	27	9.26%	30	11.86%	33
Application Projects Consulting	23	15.22%	27	5.66%	28	10.71%	31	6.45%	33	-9.09%	30	-6.67%	28	3.57%	29	3.45%	30
Customer Experience & Digital Consulting (customer journeys, Customer Experience consulting, service design, Digital consulting) - doesn't include UX	17	17.65%	20	50.00%	30	13.33%	34	11.76%	38	-7.89%	35	-5.71%	33	3.03%	34	5.88%	36
Intelligent Automation & Process Optimization	6	33.33%	8	50.00%	12	50.00%	18	11.11%	20	-10.00%	18	-11.11%	16	-12.50%	14	14.29%	16
PMO/ OCIO Consulting	12	16.67%	14	28.57%	18	38.89%	25	-4.00%	24	-16.67%	20	-10.00%	18	-5.56%	17	11.76%	19
Cyber Security Consulting	26	7.69%	28	50.00%	42	47.62%	62	4.84%	65	9.23%	71	8.45%	77	9.09%	84	9.52%	92
TOTALS	148	12.84%	167	31.14%	219	28.31%	281	9.25%	307	-5.54%	290	-2.07%	284	2.29%	291	8.09%	314

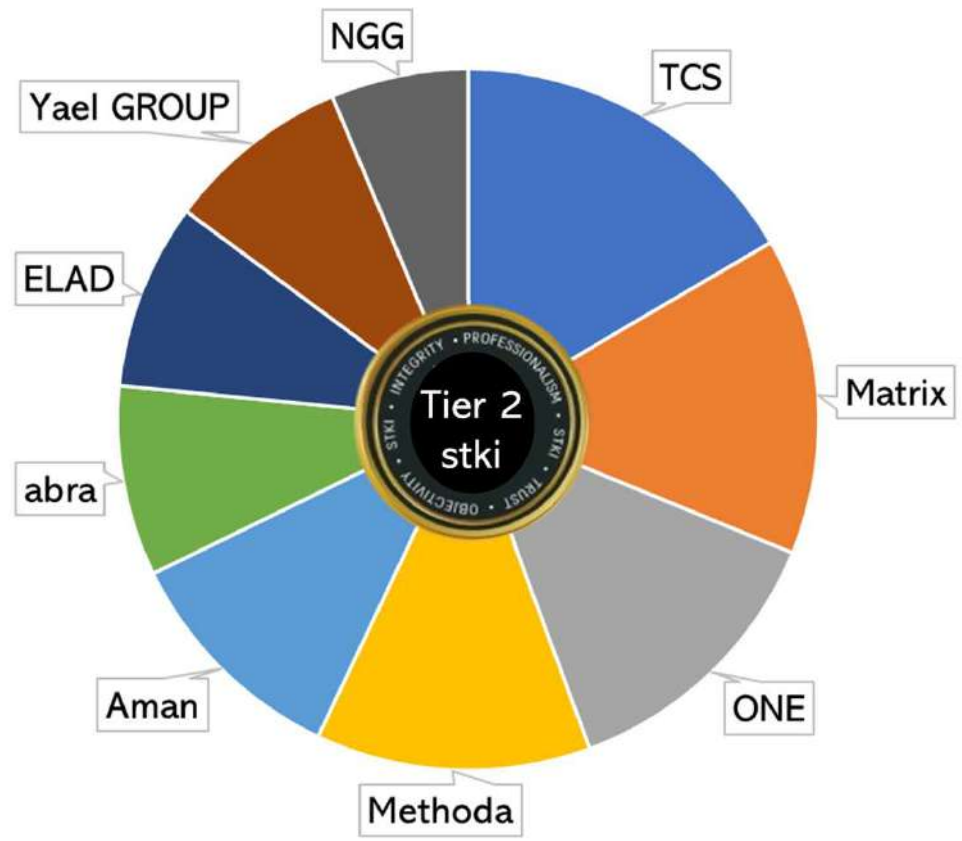
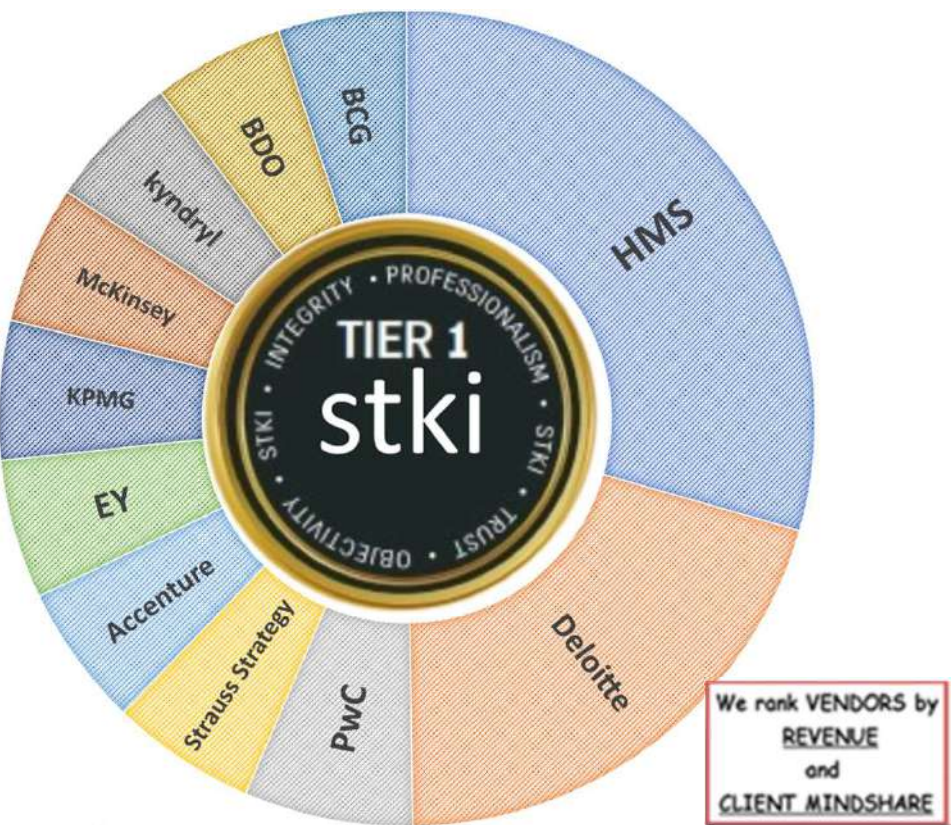
Values in Million USD



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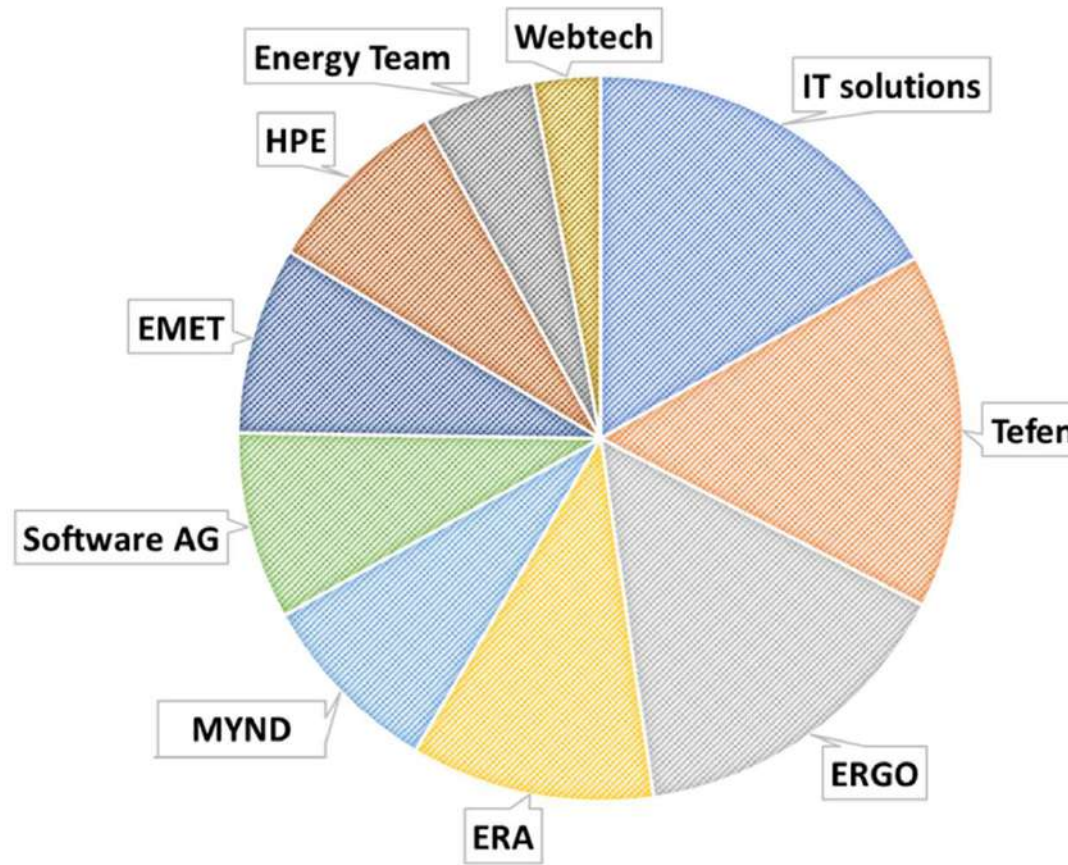
IT Strategy Consulting



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IT Strategy Consulting



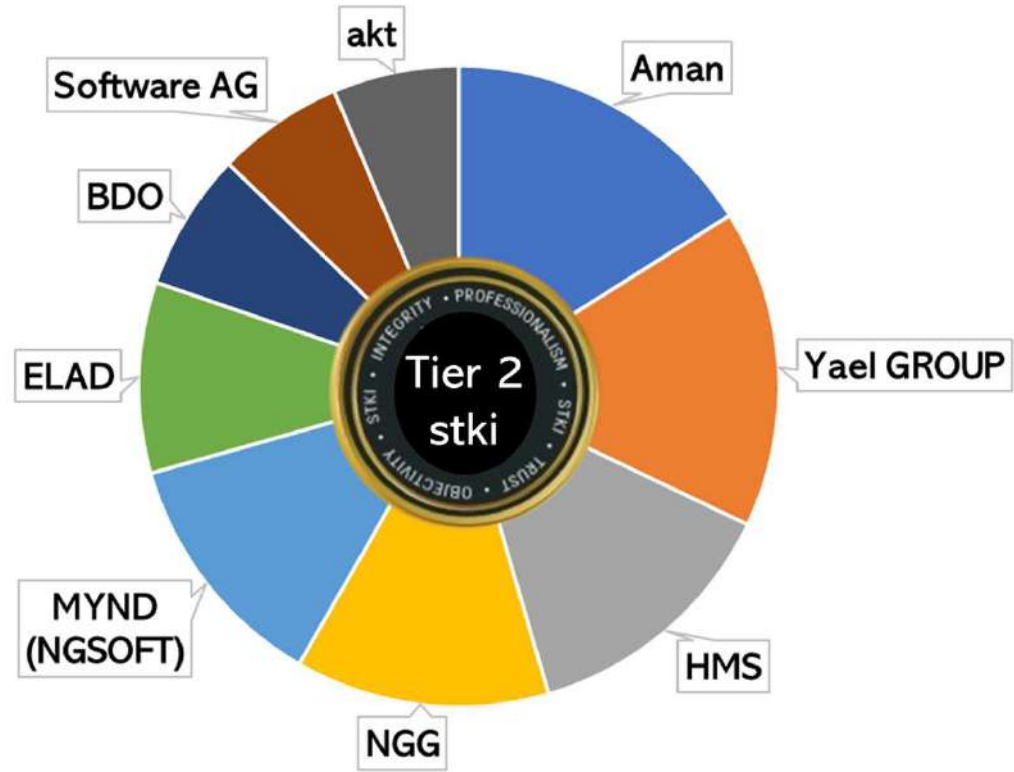
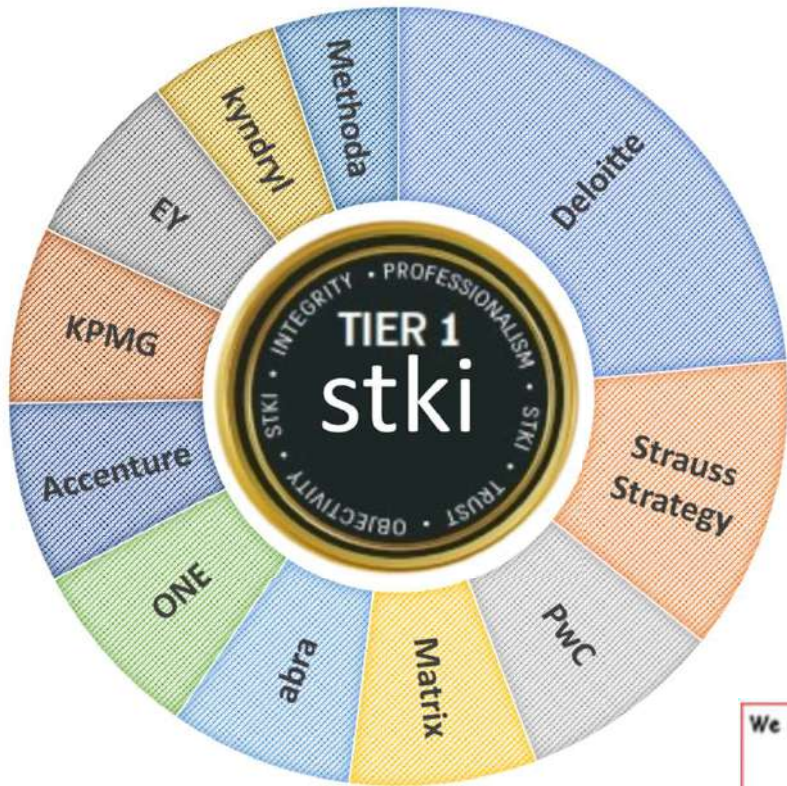
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and
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Organizational Transformation Consulting



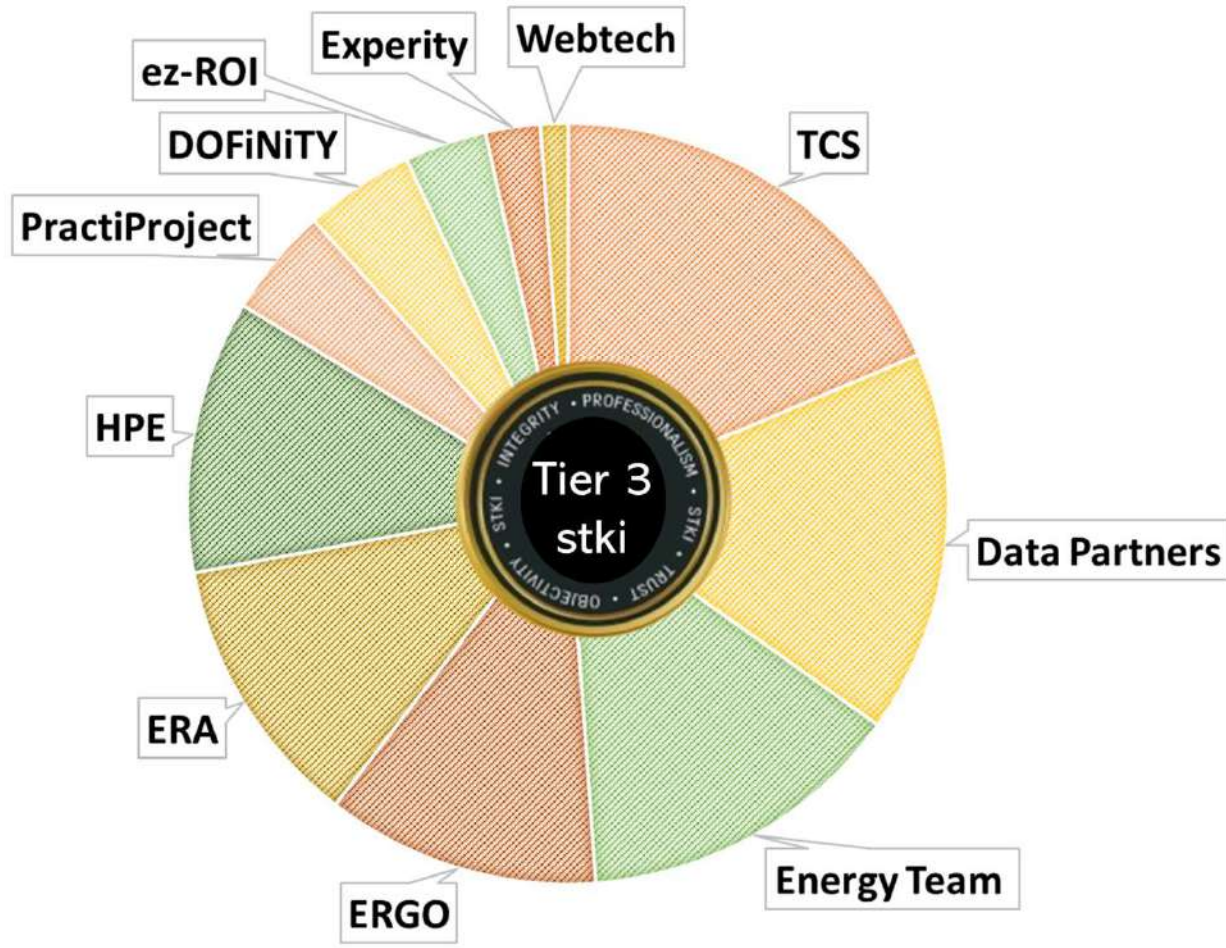
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Organizational Transformation Consulting



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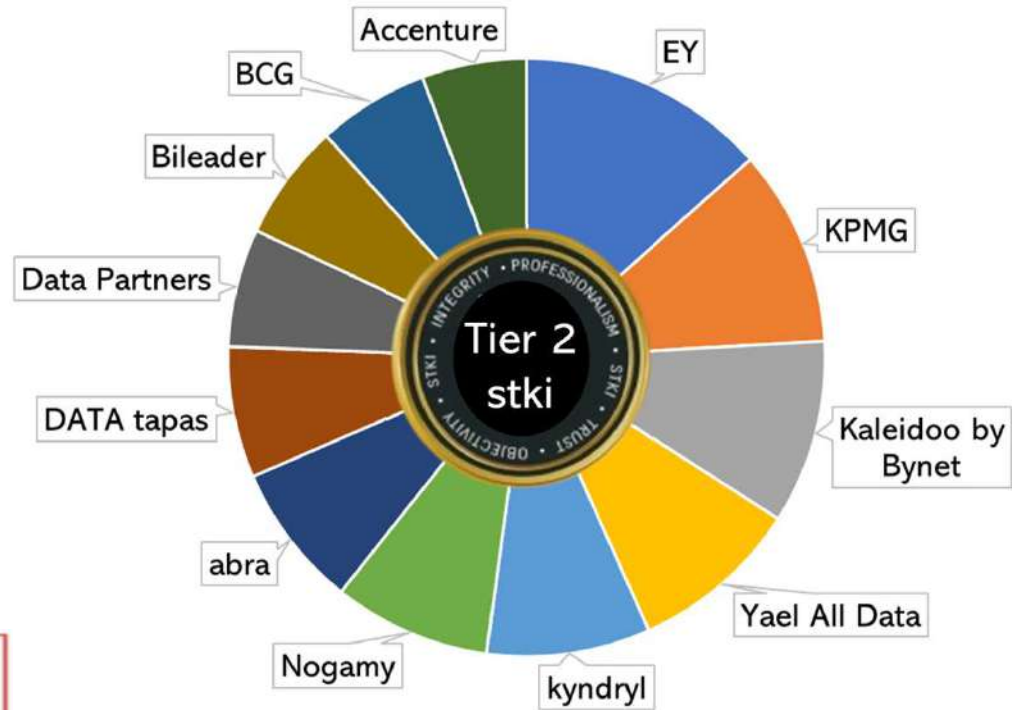
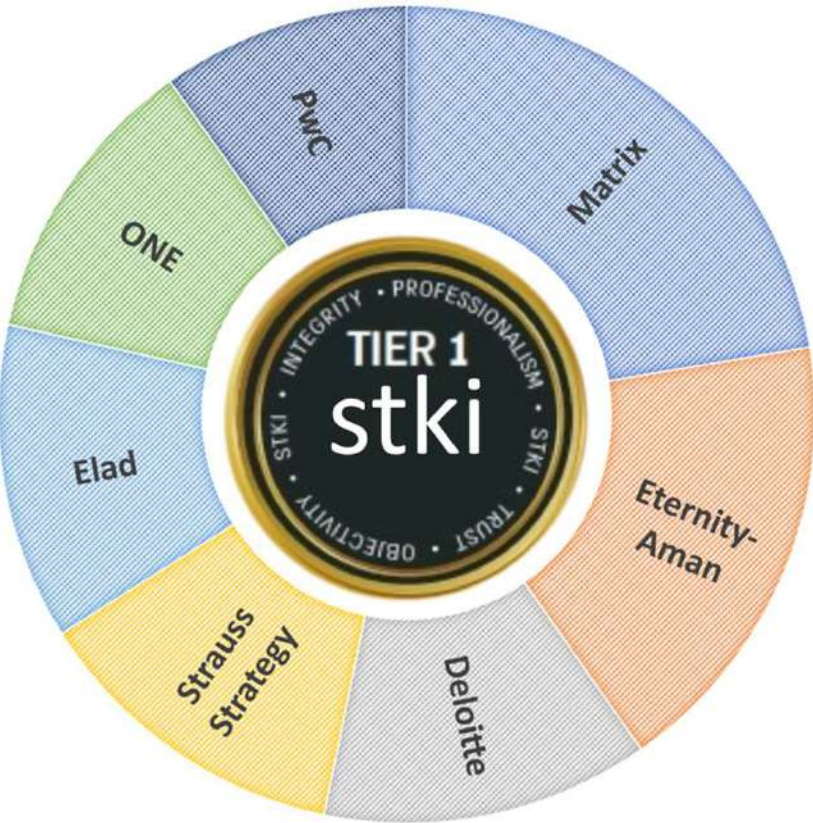


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Data & Analytics Strategy Consulting (organizational, methodologies, architecture, use cases, culture, literacy)



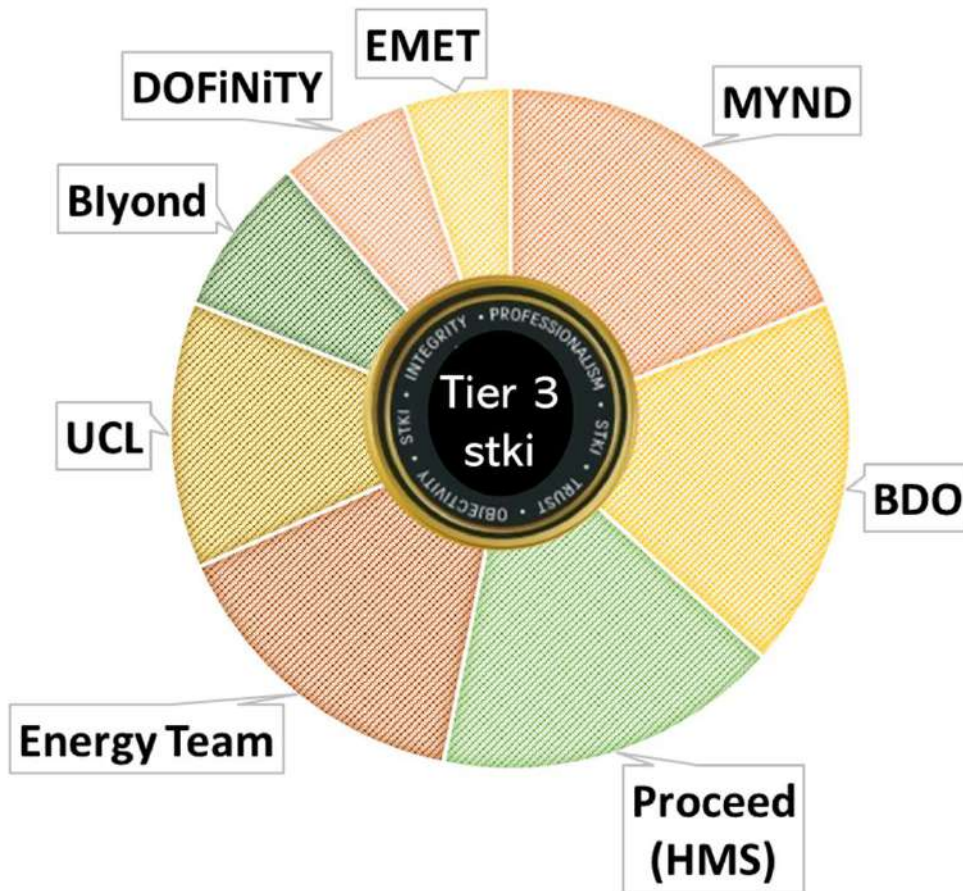
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Data Strategy Consulting



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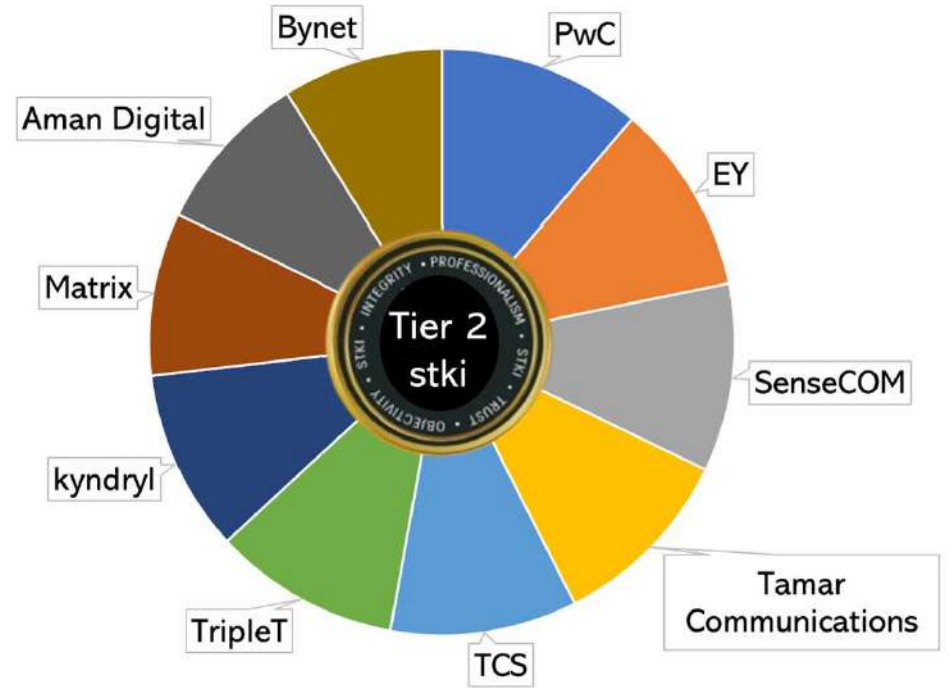
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IT Infrastructure & Cloud Consulting

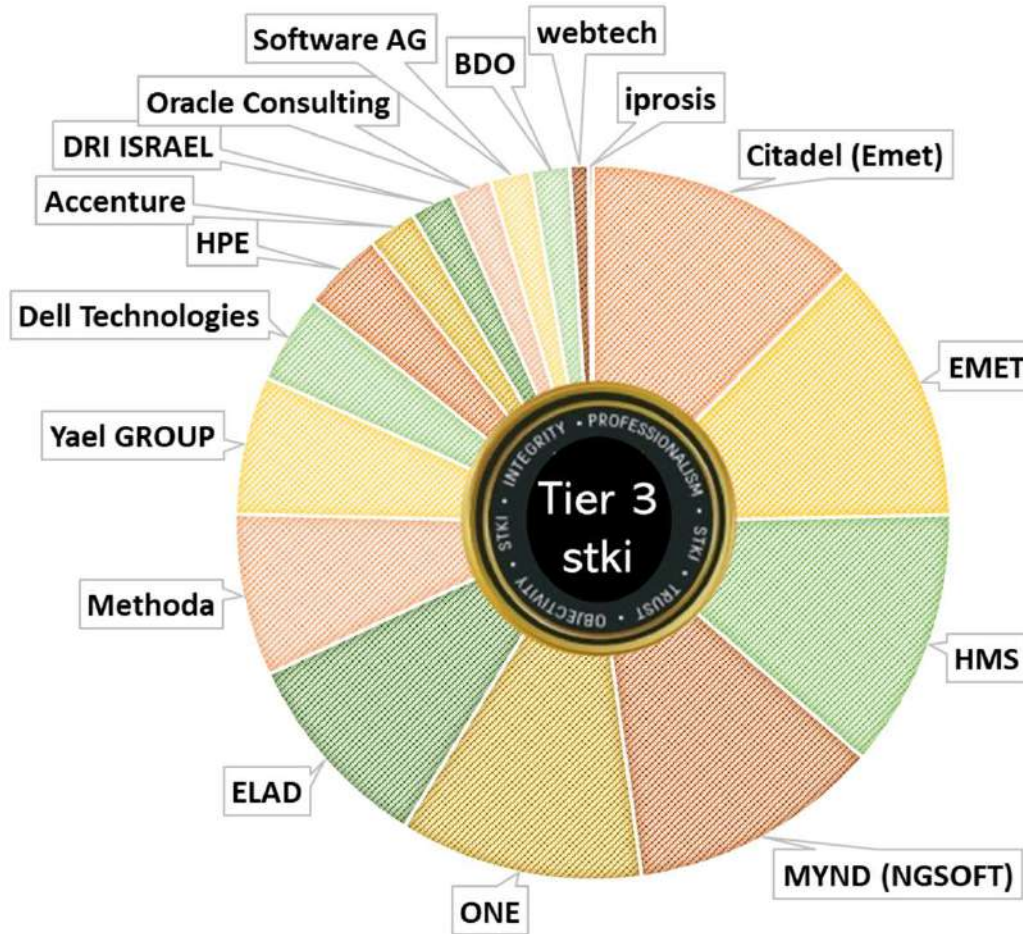


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IT Infrastructure & Cloud Consulting



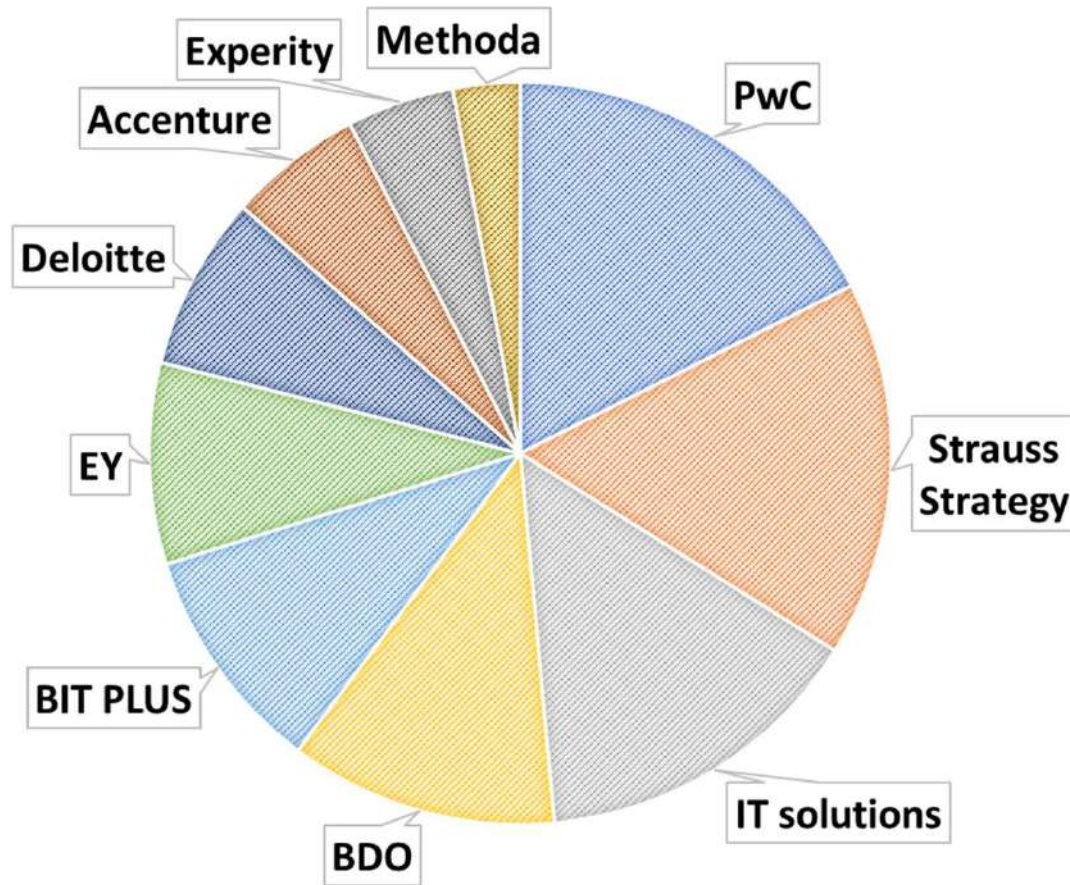
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Application Projects Consulting

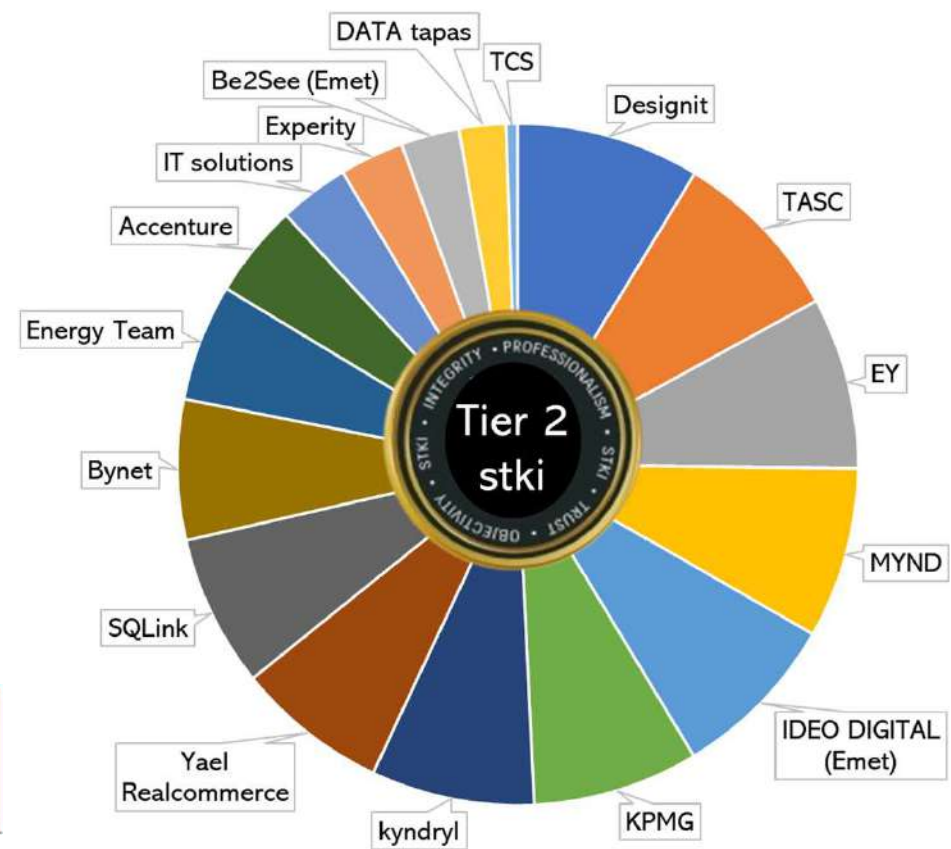
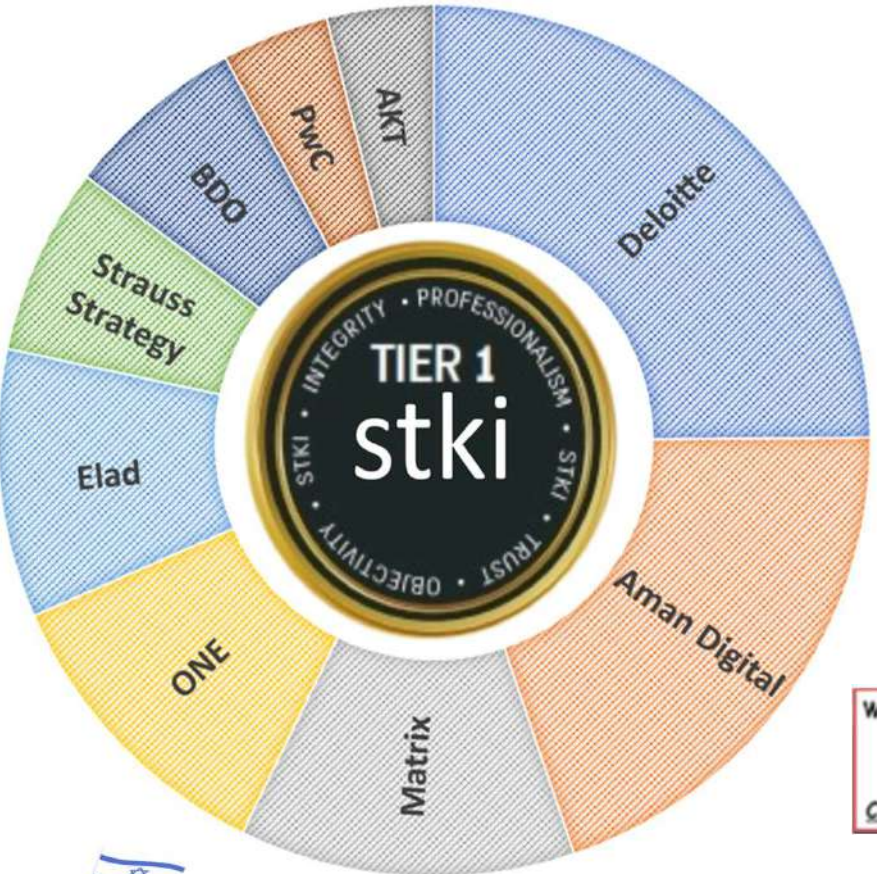


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Customer & Employee Experience Strategy Consulting (customer journeys, service design)



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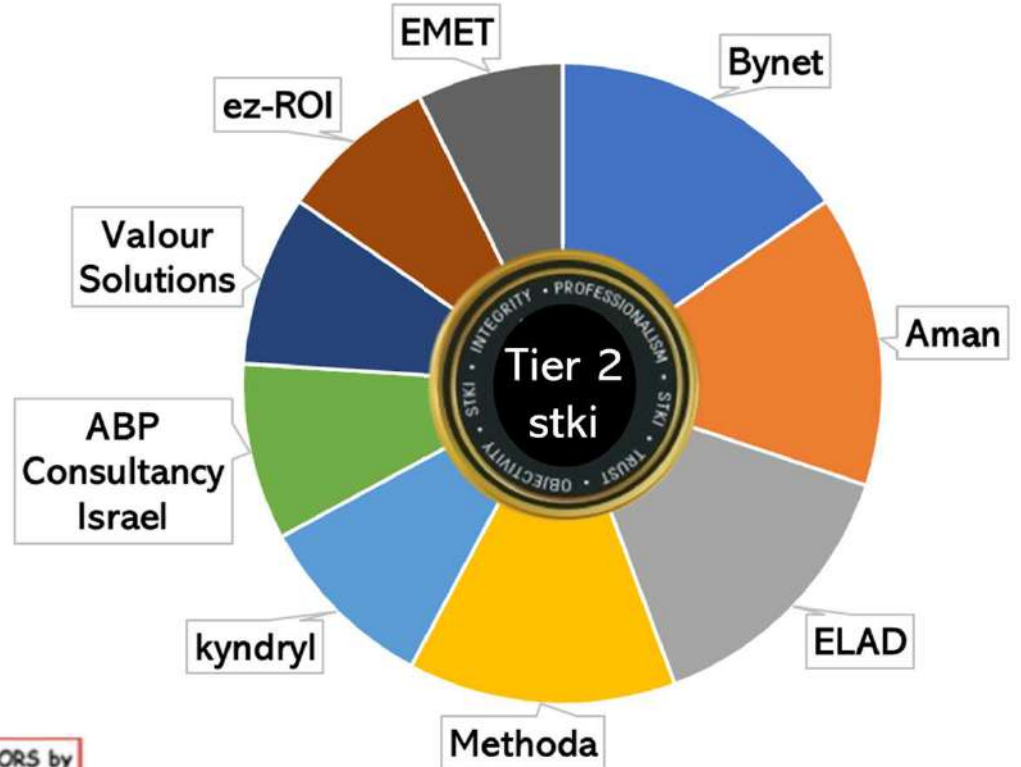
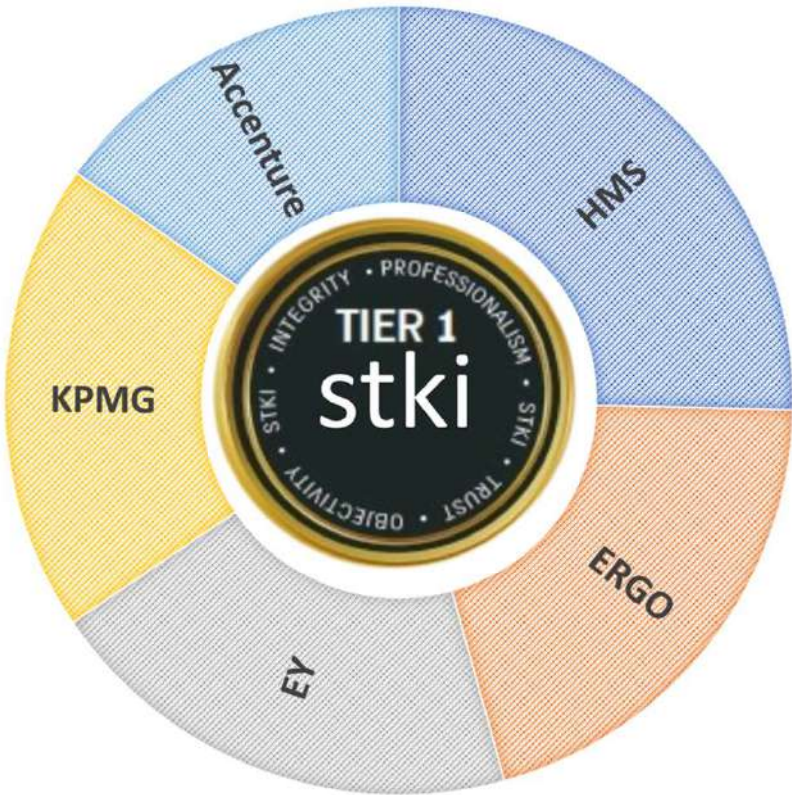


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Automation & Process Consulting



value added services market



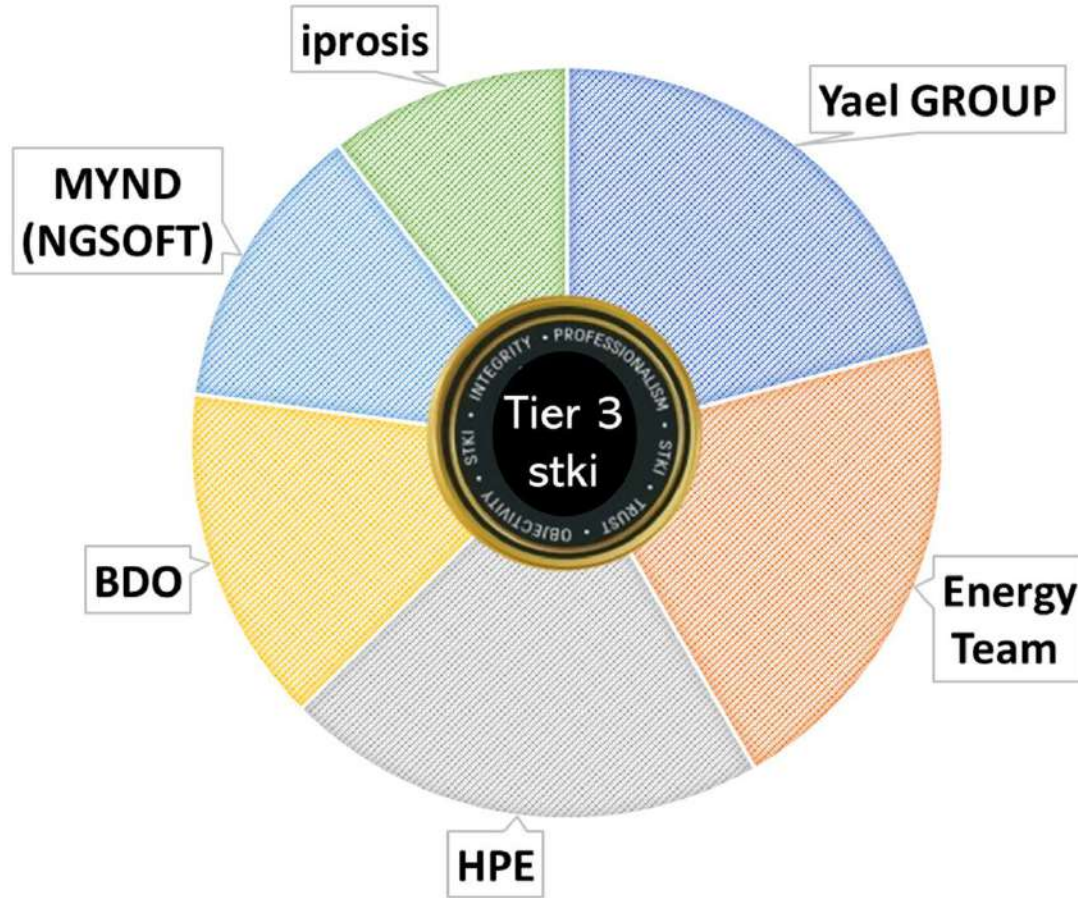
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Automation & Process Consulting



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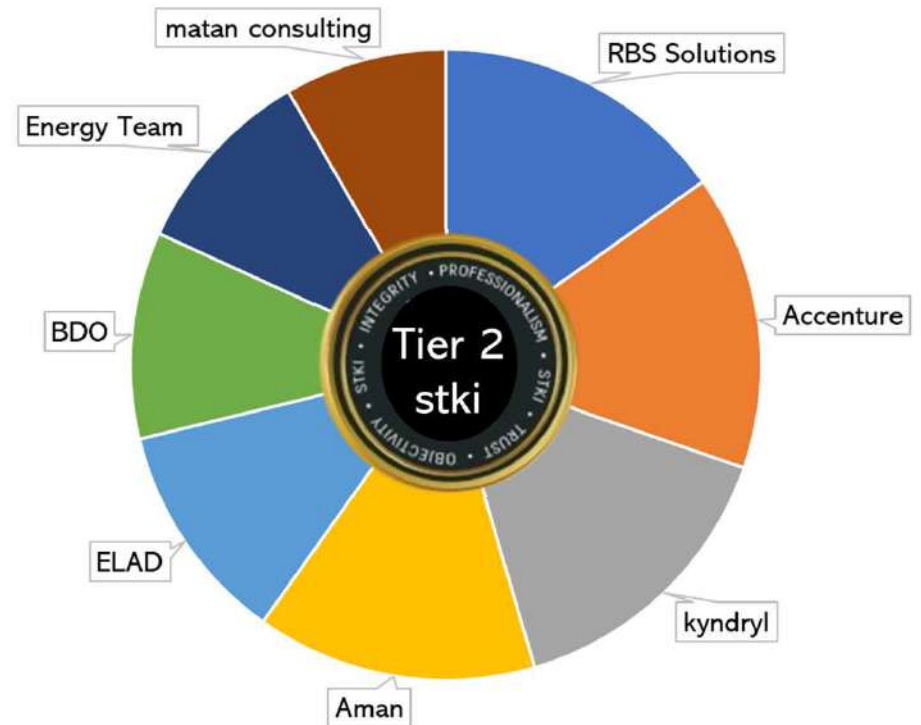
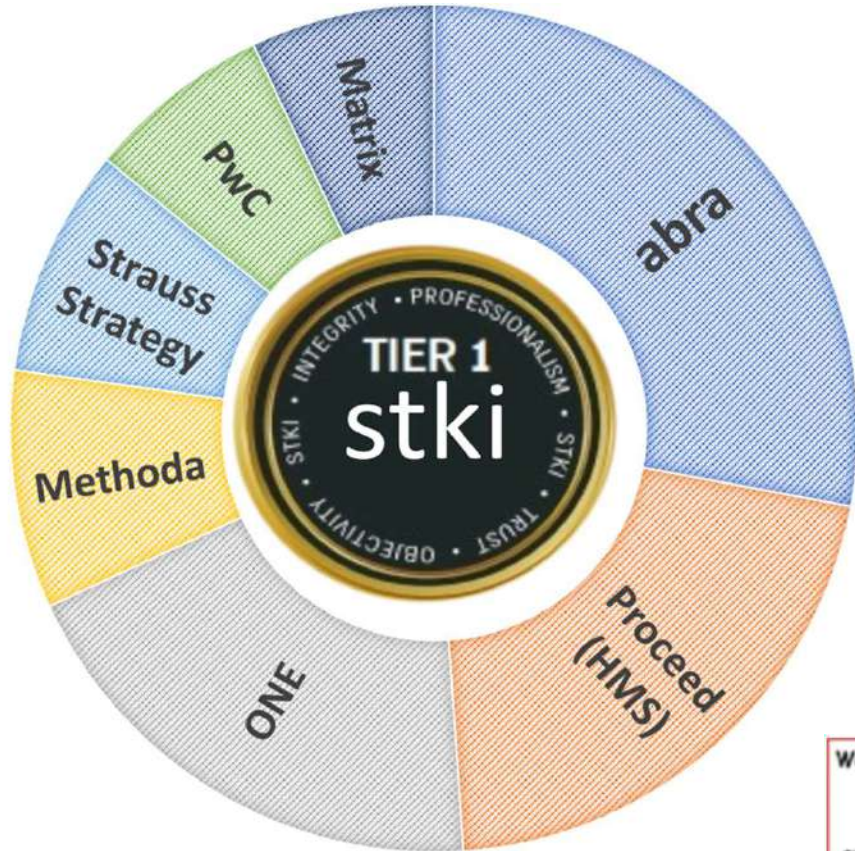


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Project Management/ OCIO Consulting

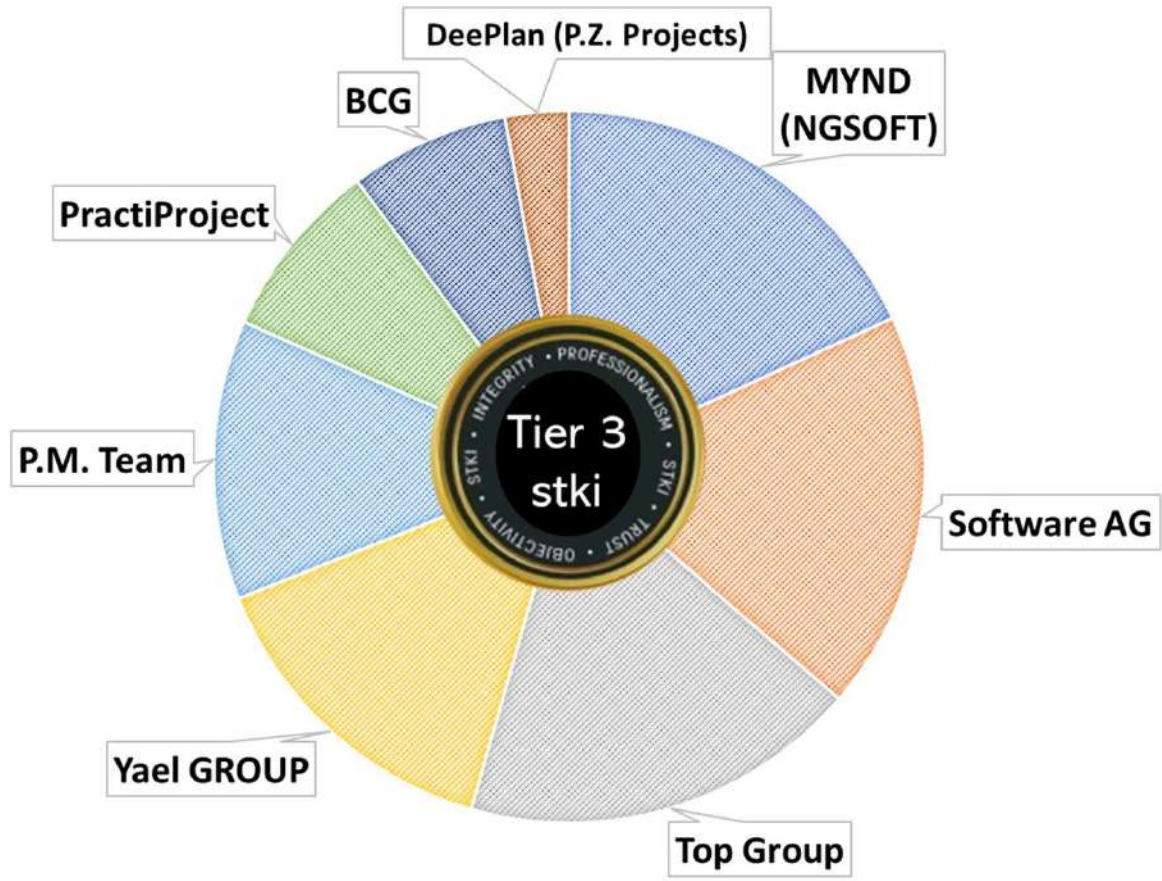


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Project Management/ OCIO Consulting



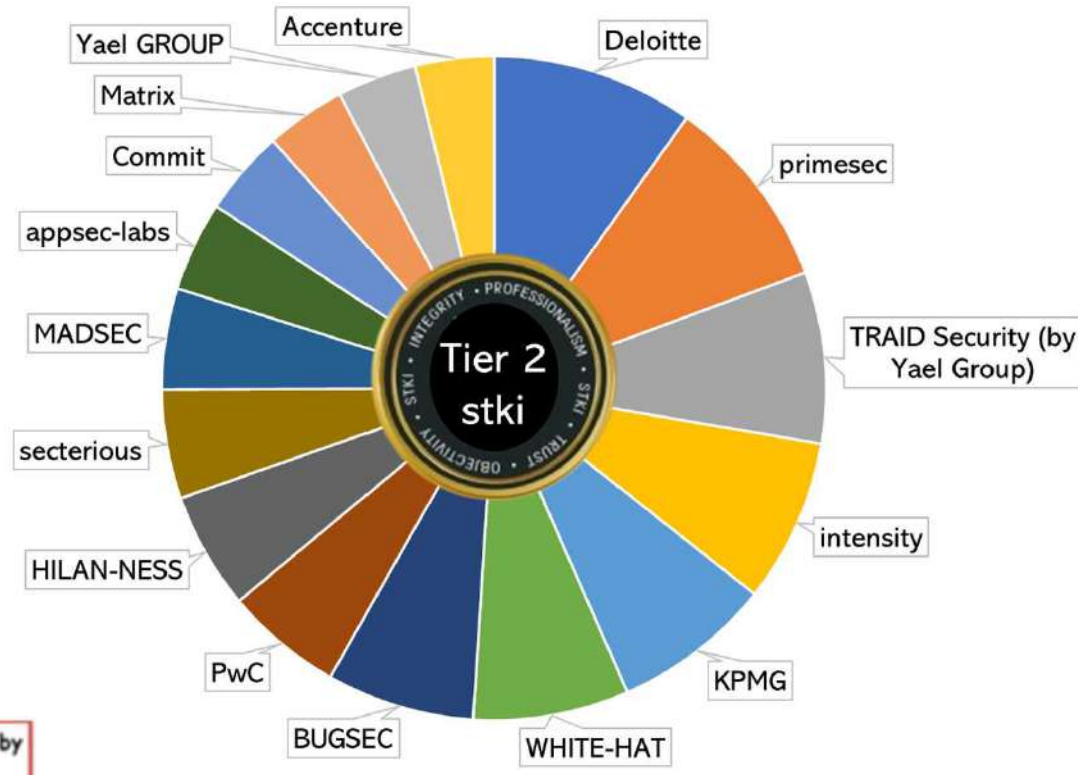
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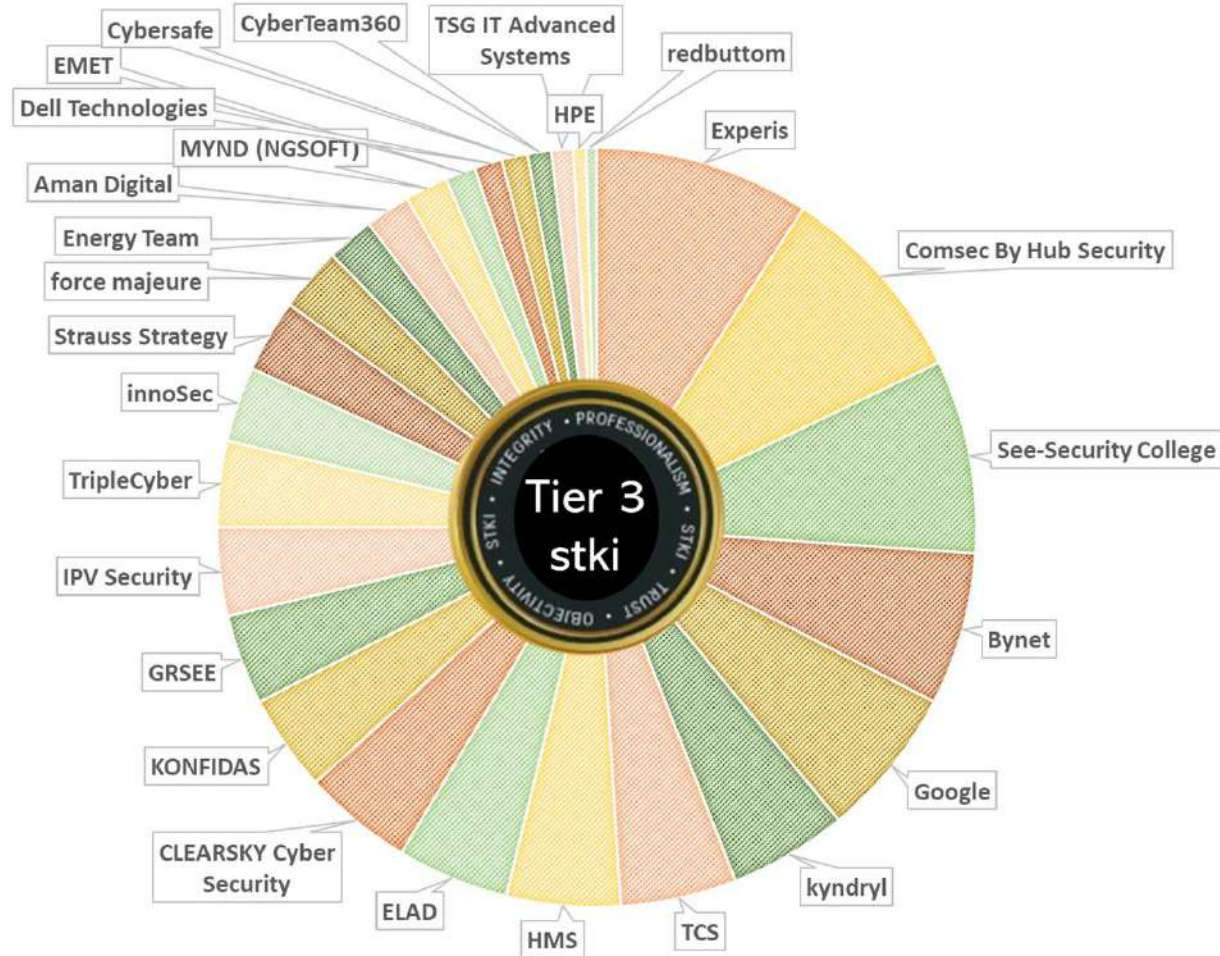
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3rd Party Maintenance Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Software Maintenance (3rd party)	25	-16.00%	21	9.52%	23	8.70%	25	8.00%	27	-7.41%	25	-4.00%	24	2.08%	25	10.20%	27
Hardware Maintenance (3rd party)	79	-1.27%	78	-10.26%	70	-2.86%	68	-4.41%	65	-4.62%	62	-4.84%	59	-6.78%	55	-3.64%	53
TOTALS	104	-4.81%	99	-6.06%	93	0.00%	93	-1.08%	92	-5.43%	87	-4.60%	83	-4.22%	80	0.63%	80

Values in Million USD



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Software Products Maintenance (3rd party)

Rimini Street



Linnovate



kyndryl

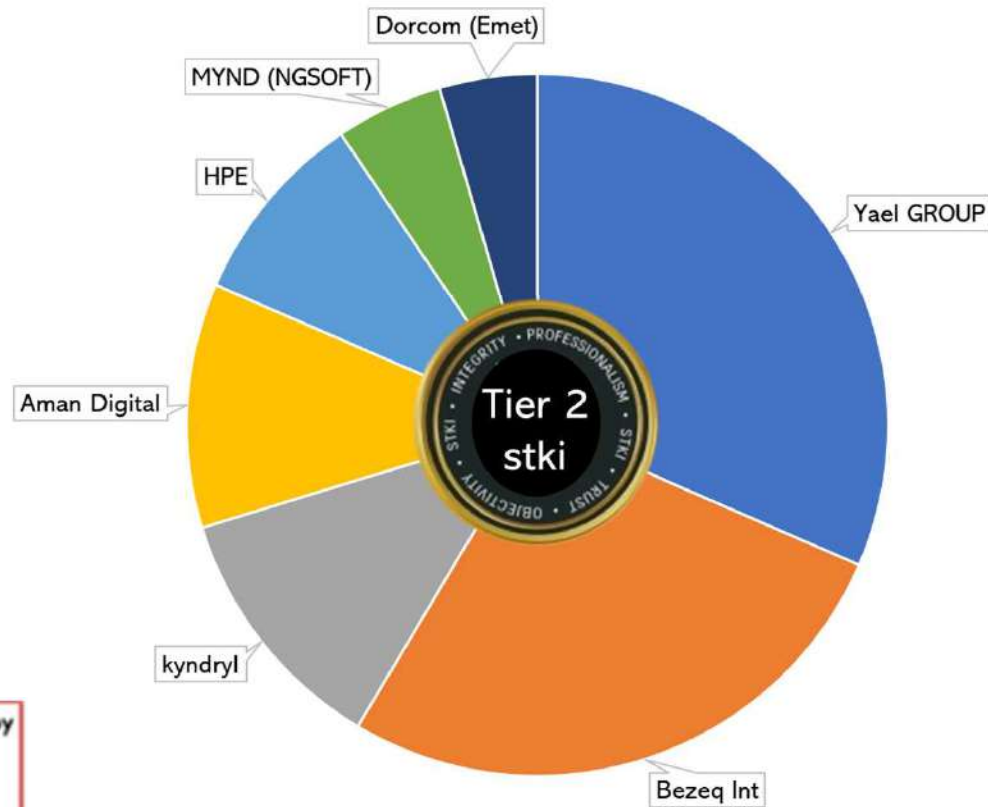
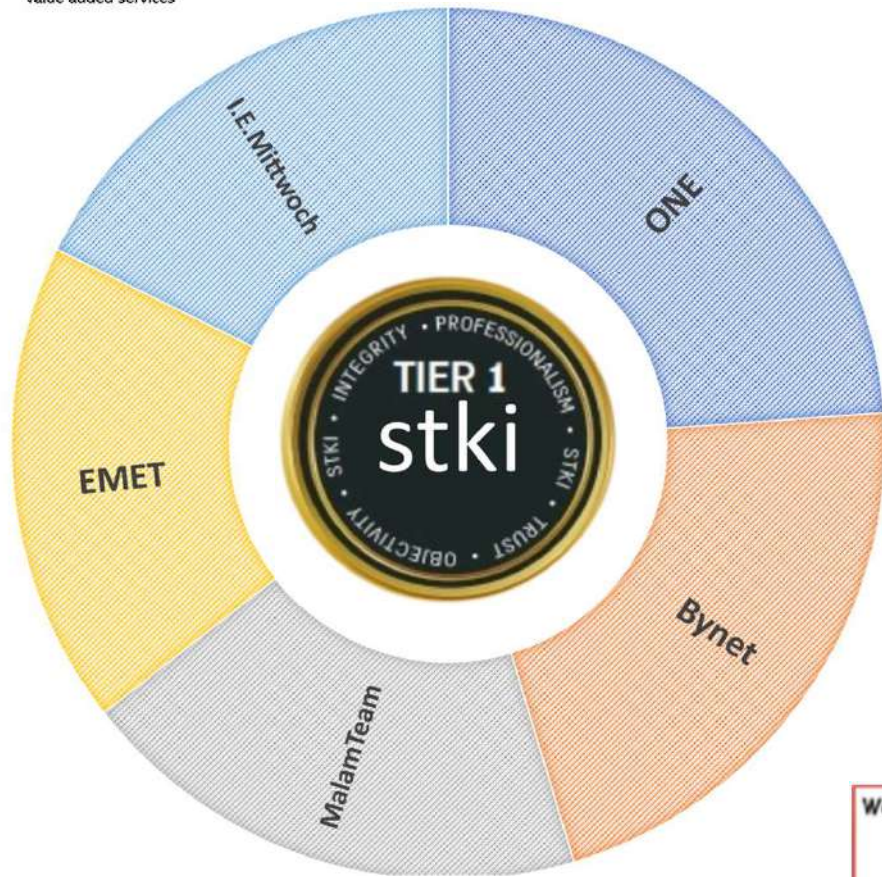
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Hardware Products Maintenance (3rd party)



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Infrastructure Projects (On Premise) Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Consolidation/ Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects	205	1.46%	208	-6.25%	195	4.62%	204	11.76%	228	-1.32%	225	-1.33%	222	1.80%	226	3.98%	235
Software Integration (Middleware, SOA, APIMNG)	75	6.67%	80	-25.00%	60	25.00%	75	6.67%	80	-8.75%	73	-6.85%	68	4.41%	71	9.86%	78
Cyber Security Product Implementations	210	2.15%	214	4.67%	224	2.68%	230	3.48%	238	5.04%	250	8.00%	270	9.26%	295	10.17%	325
Unified Communication Projects (IM, Video, Voice)	10	25.00%	13	76.00%	22	36.36%	30	13.33%	34	-11.76%	30	-6.67%	28	-3.57%	27	7.41%	29
TOTALS	500	3.00%	515	-2.62%	501	7.58%	539	7.61%	580	-0.34%	578	1.73%	588	5.27%	619	7.75%	667

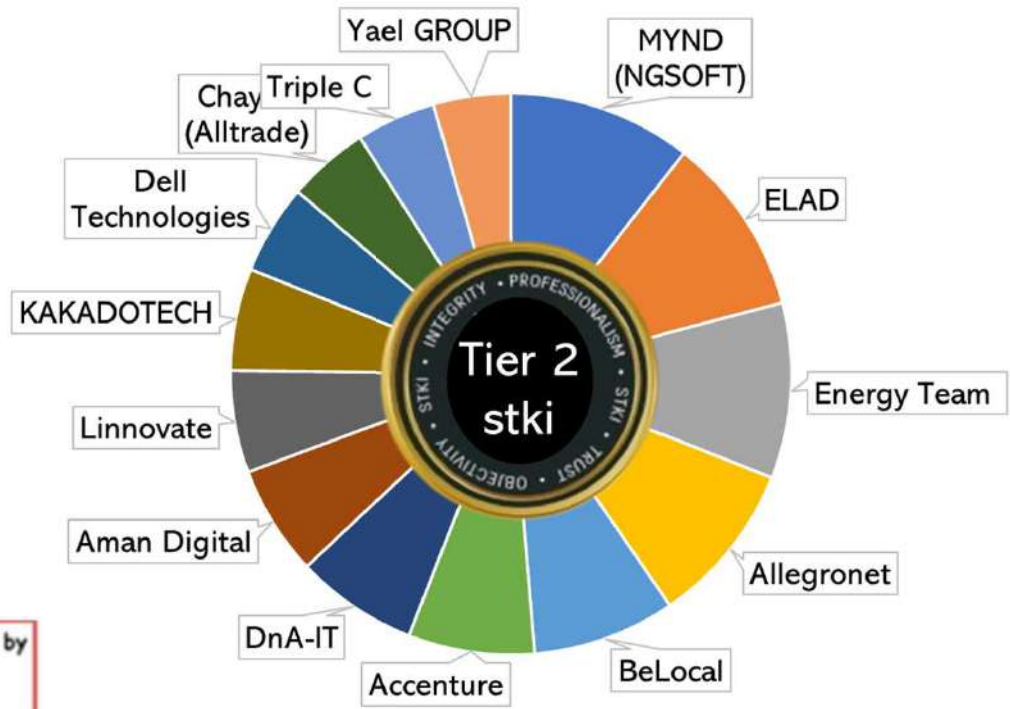
Values in Million USD



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Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects (On Premise)



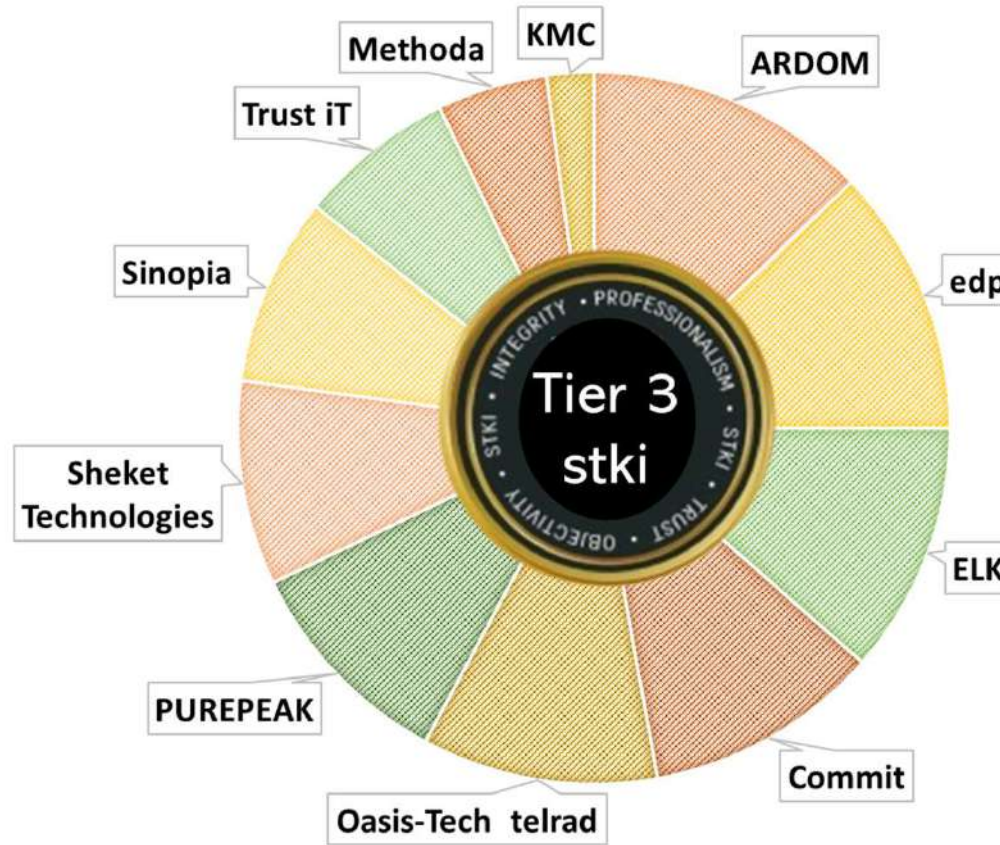
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Consolidation/ Virtualization/ Containers /Monitoring/ BSM/ Storage/ Hardware/ Networking Projects (On Premise)



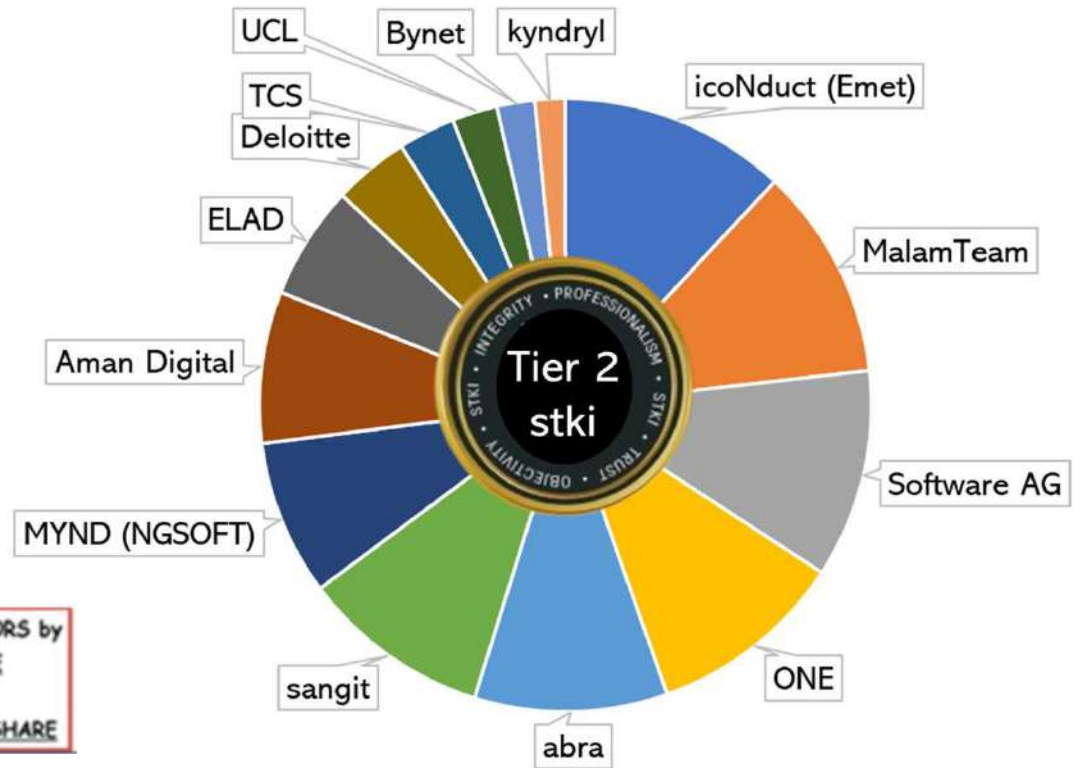
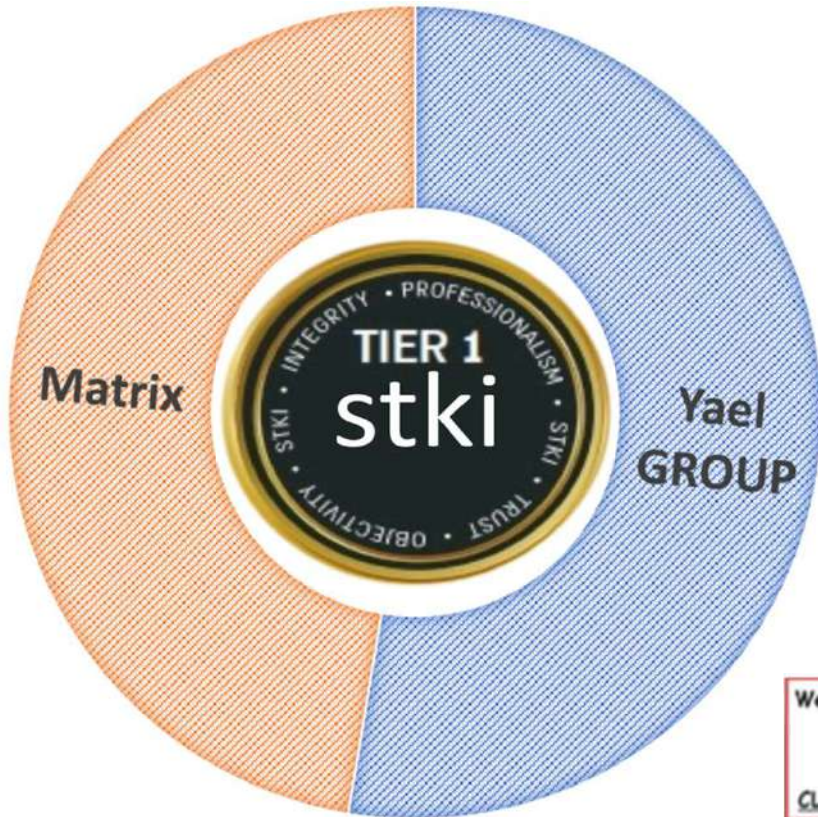
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Software Integration of Middleware, SOA & BPM (on premise)

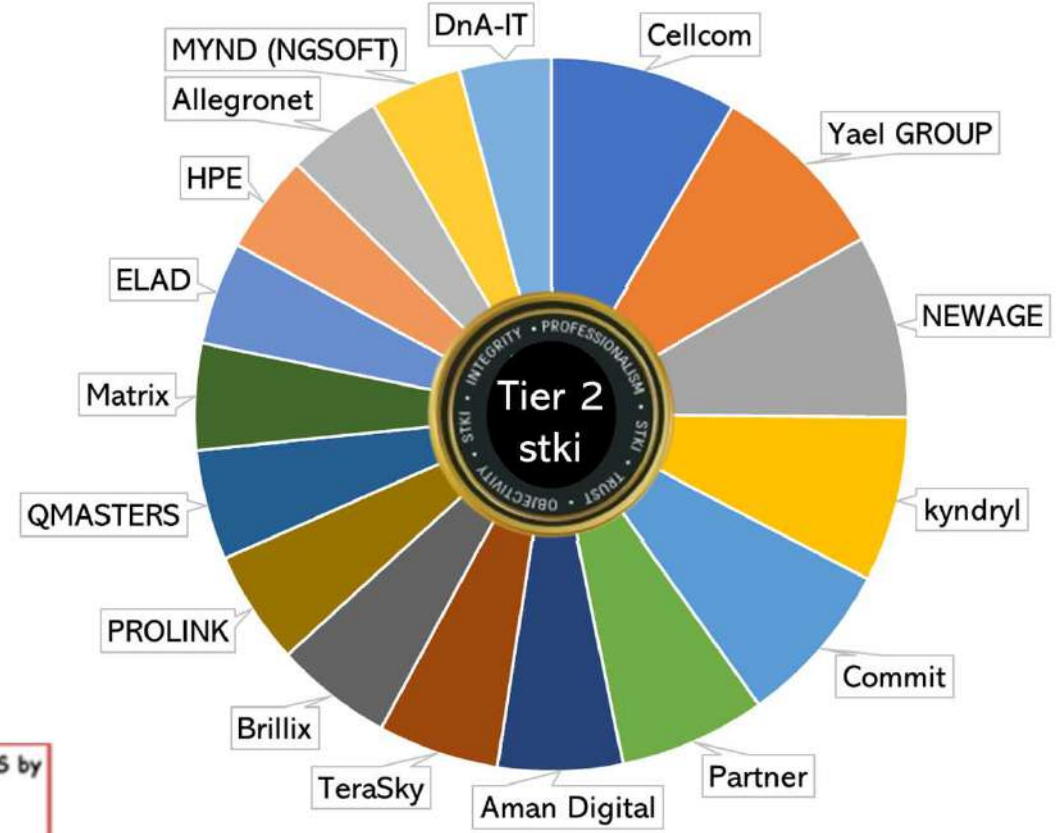


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Cyber Security Product Implementations (On Premise)



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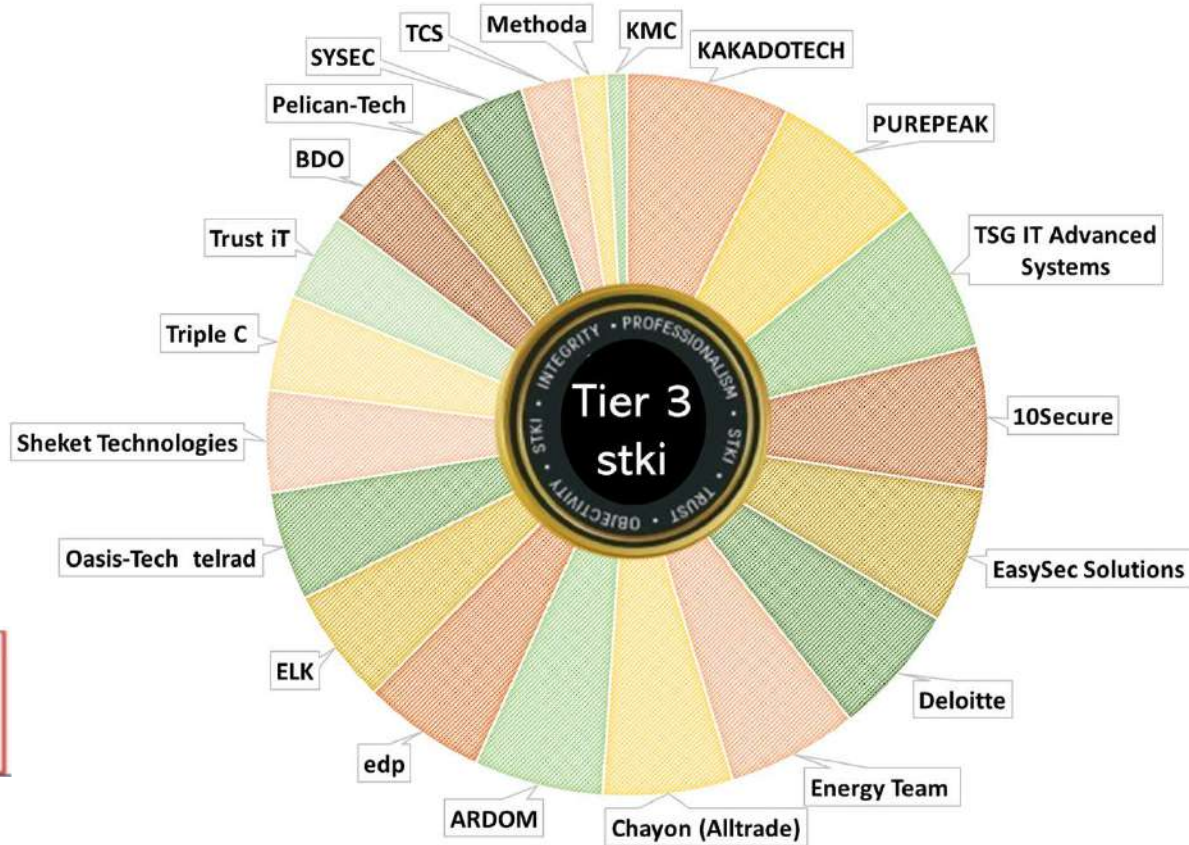
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Cyber Security Product Implementations

(On Premise)



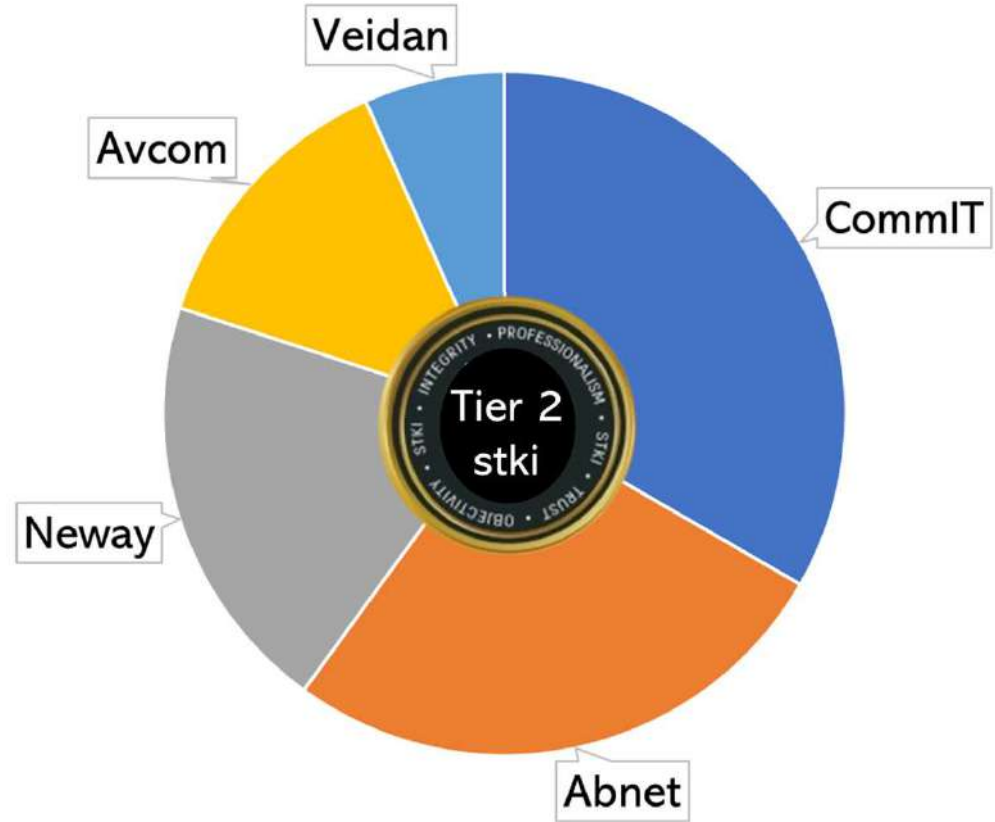
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Unified Communication Projects (IM, Video, Voice) (On Premise)



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Enterprise Cloud Infrastructure Projects Market 2018-2026

	2018	2019	2020	2021	2022	2023	2024	2025	2026							
Consolidation/ Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects / Software Integration (Middleware, SOA, APIMNG)	we "added" all this categories together;because of the way CLOUD PROJECTS are done															
Cyber security product implementations																
Unified Communication Projects (IM, Video, Voice)																
Cloud Migration end to end Projects (including SW development)																
TOTAL										0	50	78.00%	89	40.45%	125	18.40%

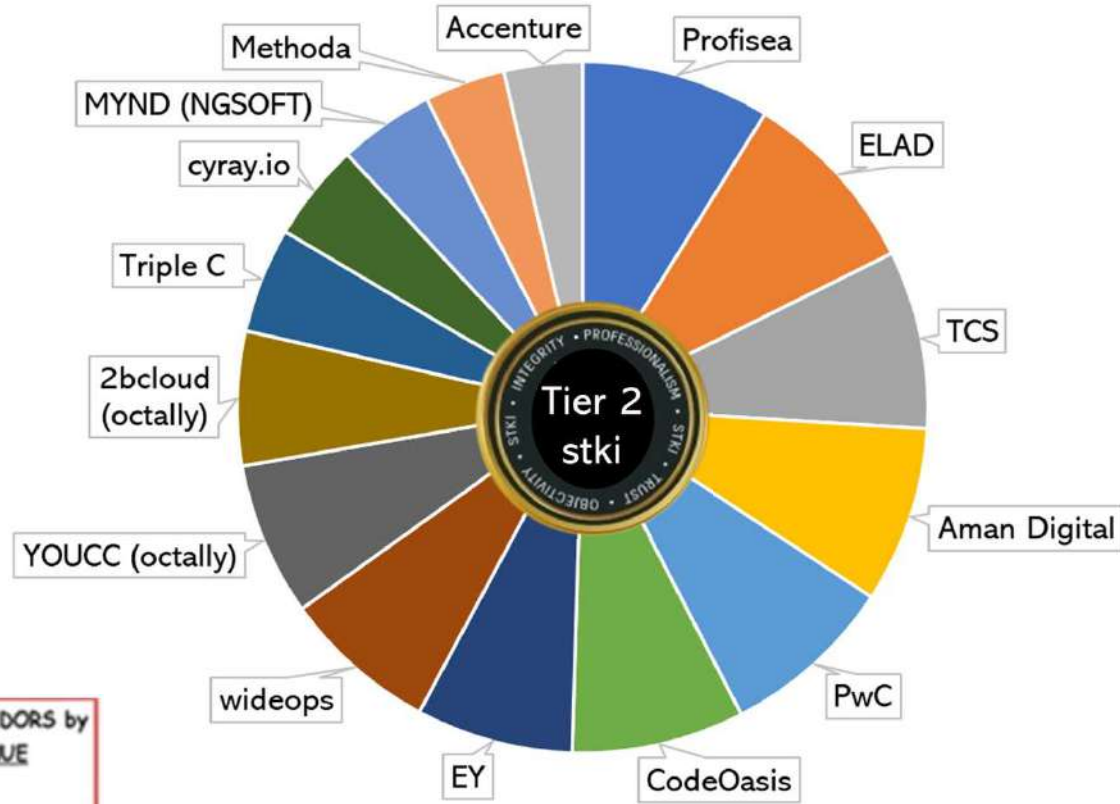
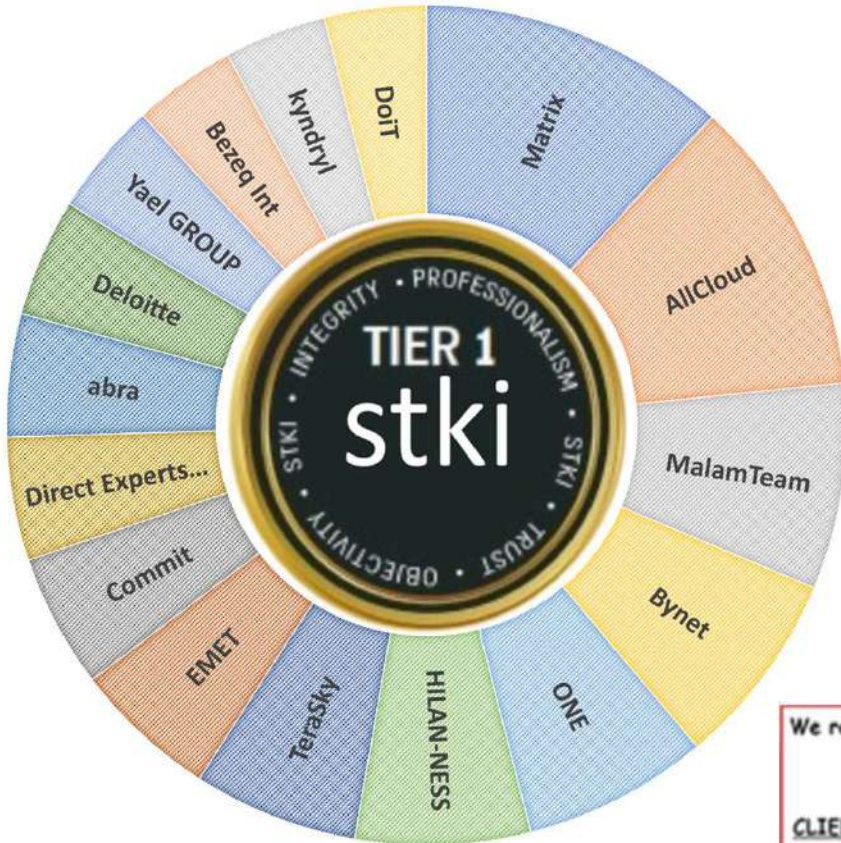
Values in Million USD



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Enterprise Cloud Infrastructure Projects



We rank VENDORS by
REVENUE
and
CLIENT MINDSHARE



Enterprise Cloud Infrastructure Projects

1



directeam.io
BeLocal
HPE
DnA-IT
Energy Team
webtech
DOFINITY
Top Group
Cellcom
Partner
Brillix
PROLINK
KAKADOTECH
TSG IT
Advanced Systems
Chayon (Alltrade)
Eshnav-Aman
CODEVALUE
galil software

2



Sela
Allegronet
PUREPEAK
ARDOM
edp
ELK
Oasis-Tech telrad
Sheket Technologies
Trust IT
BDO
KMC
icoNduct (Emet)
sangit
Linnovate
Sinopia
Experis
HMS
Oracle Consulting
iprosis
HubSpot
WEBOX

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Implementation of Project Management & Development tools MARKET 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
PPM & Project management	35	28.57%	45	-24.44%	34	-11.76%	30	6.67%	32	6.25%	34	17.65%	40	20.00%	48	22.92%	59
ALM & Development & Testing tools implementation	58	3.45%	60	-25.00%	45	-4.44%	43	-6.98%	40	12.50%	45	13.33%	51	17.65%	60	20.00%	72
TOTALS	93	12.90%	105	-24.76%	79	-7.59%	73	-1.37%	72	9.72%	79	15.19%	91	18.68%	108	21.30%	131

Values in Million USD

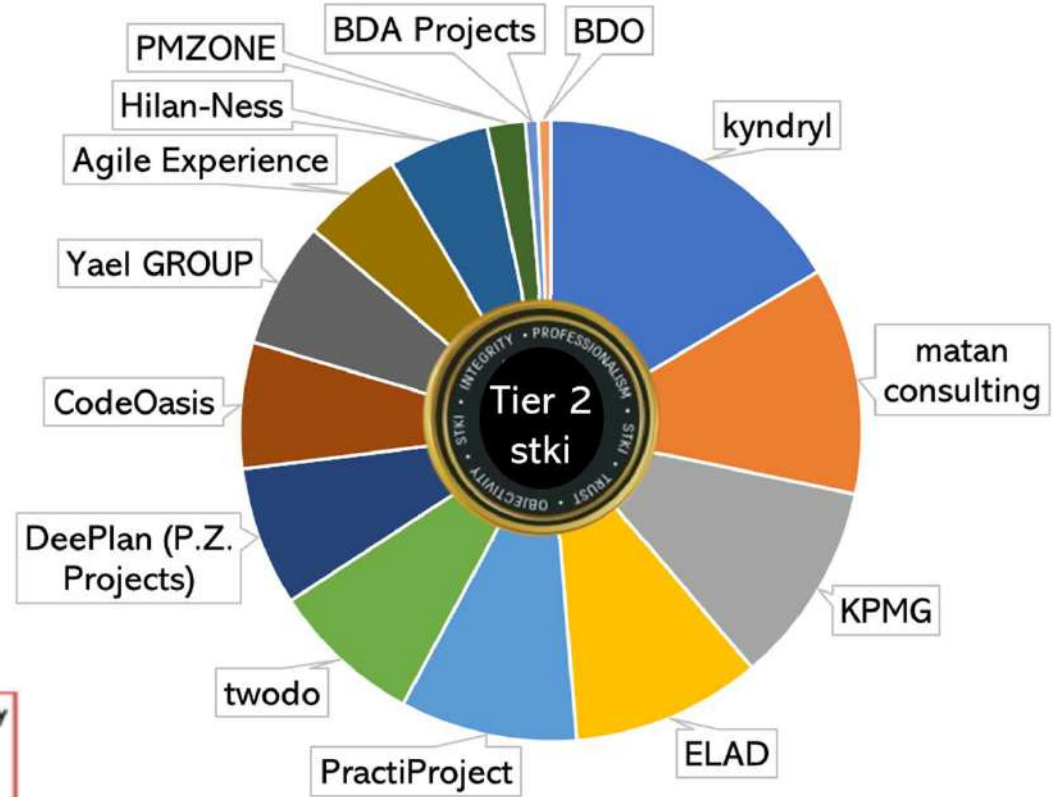
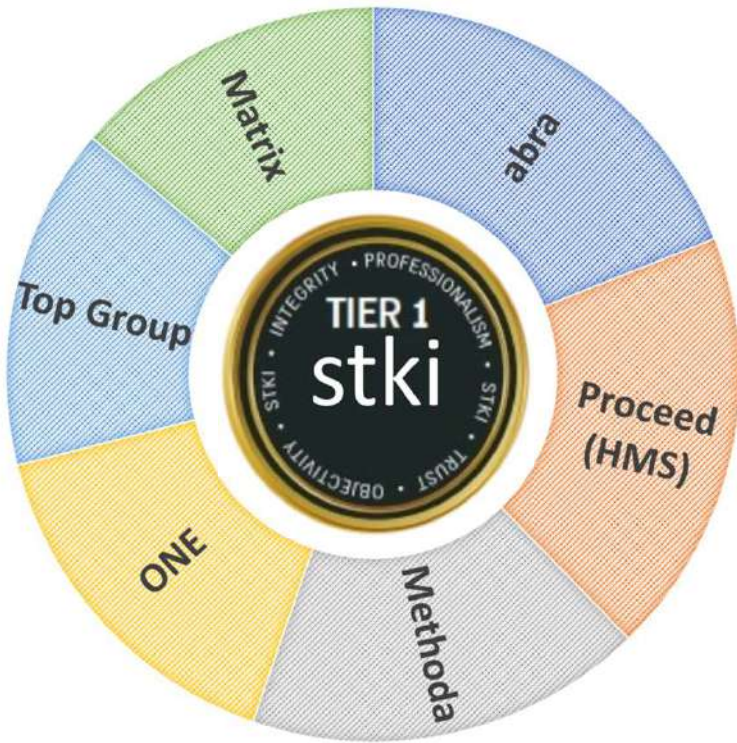


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PPM & Project Management Implementation



value added services market



We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Enterprise Software Implementations Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
ERP Implementations	138	15.94%	160	3.13%	165	4.24%	172	2.33%	176	-24.43%	133	-6.02%	125	12.00%	140	14.29%	160
HR & Talent Mngt & Payroll Implementations	28	14.29%	32	-6.25%	30	-6.67%	28	7.14%	30	3.33%	31	6.45%	33	9.09%	36	11.11%	40
CRM Implementations	188	3.72%	195	-25.64%	145	-10.34%	130	-7.69%	120	-8.33%	110	-4.55%	105	6.67%	112	7.14%	120
ITSM Implementation	20	-20.00%	16	12.50%	18	11.11%	20	-5.00%	19	-10.53%	17	-11.76%	15	13.33%	17	17.65%	20
E-Commerce and Marketplace Implementations	40	15.00%	46	17.39%	54	7.41%	58	6.90%	62	-3.23%	60	-16.67%	50	-10.00%	45	6.67%	48
Marketing Automation Implementations	28	14.29%	32	6.25%	34	17.65%	40	5.00%	42	-4.76%	40	-10.00%	36	-5.56%	34	5.88%	36
TOTALS	442	8.82%	481	-7.28%	446	0.45%	448	0.22%	449	-12.92%	391	-6.91%	364	5.49%	384	10.42%	424

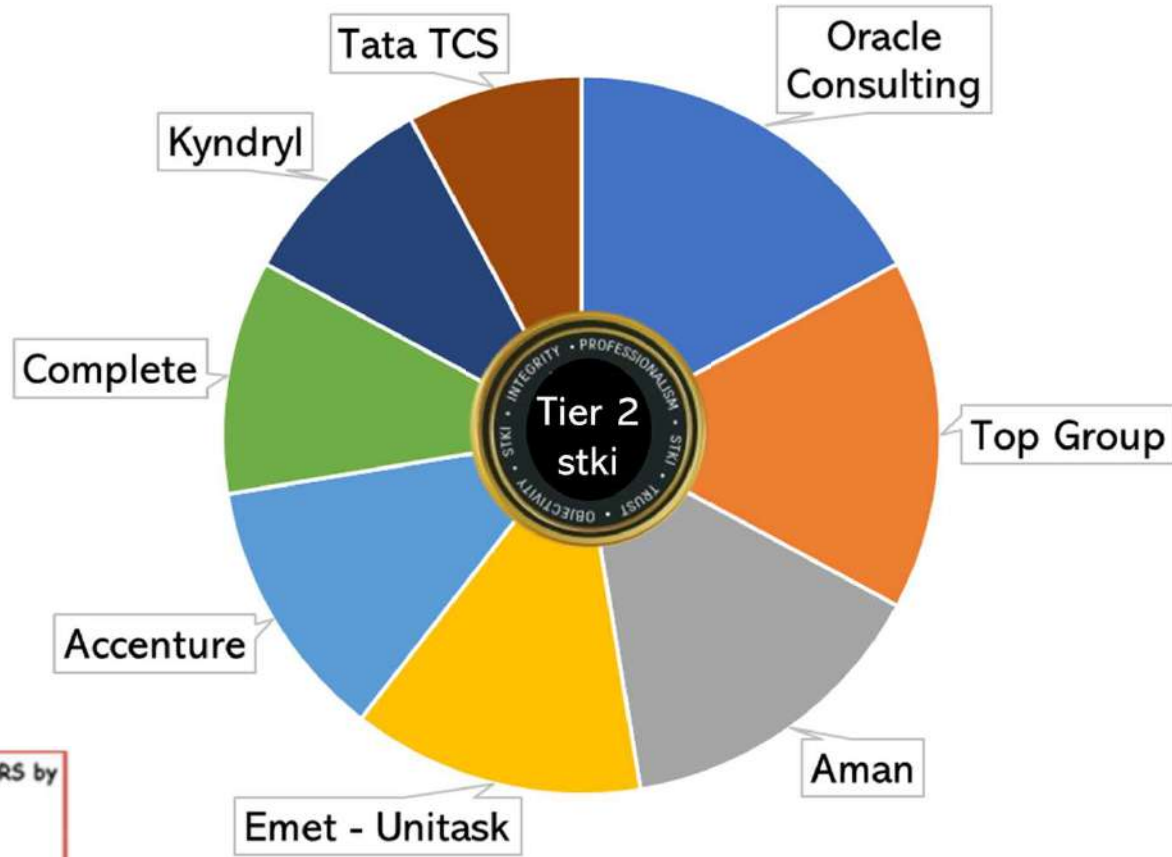
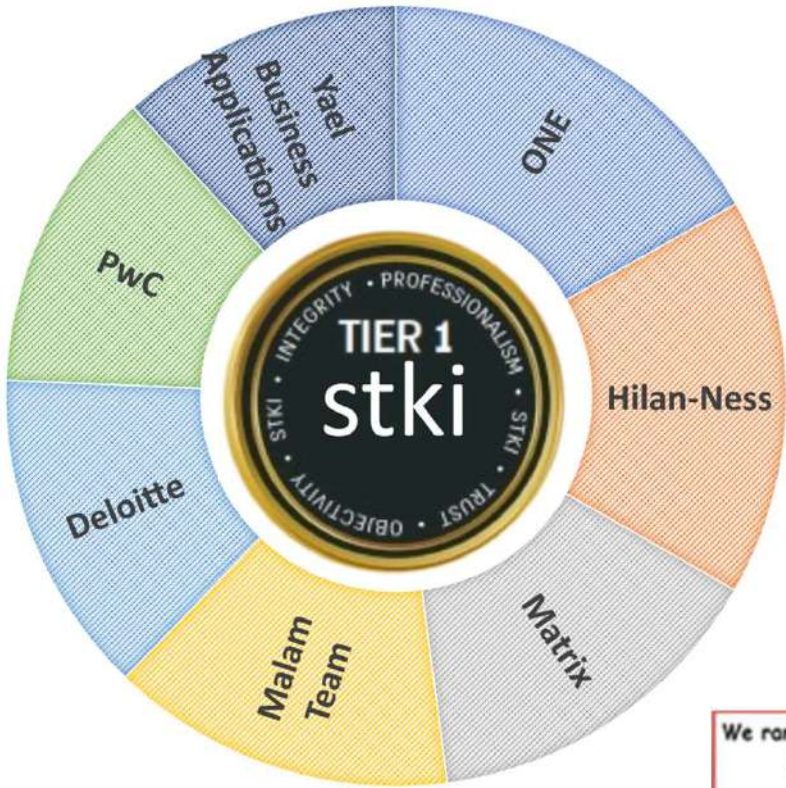
Values in Million USD



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ERP Implementations



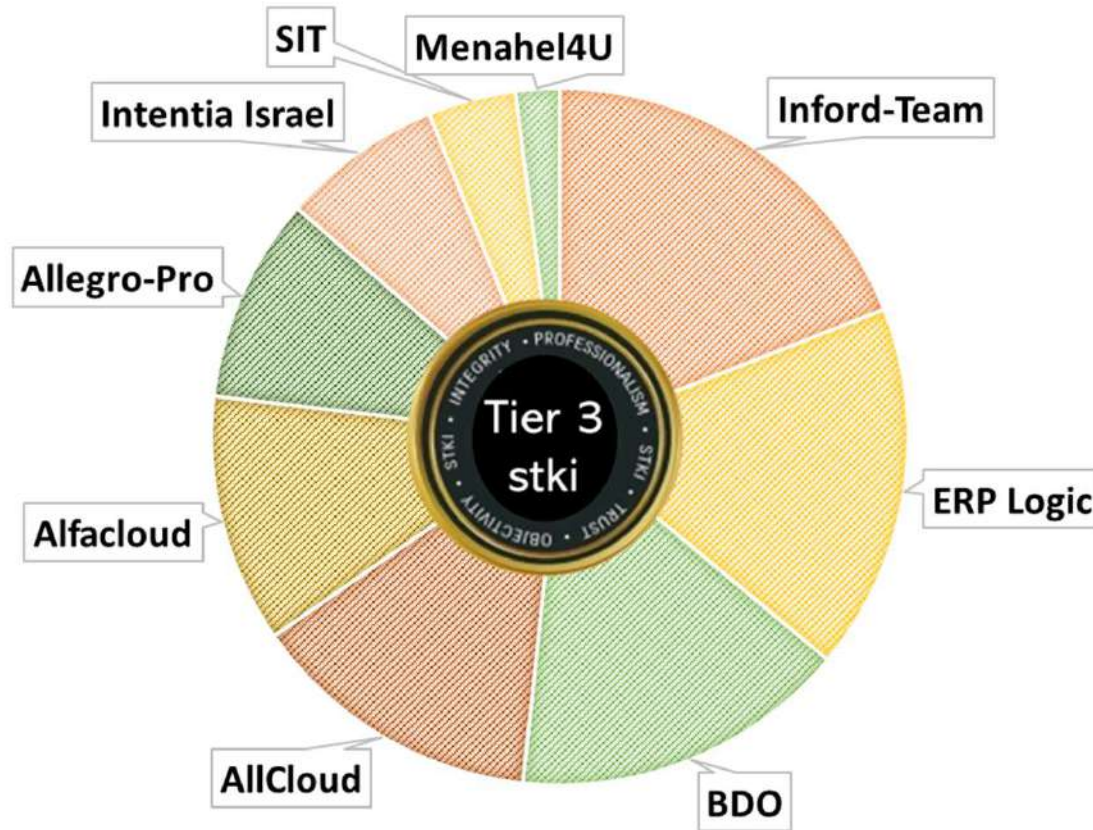
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ERP Implementations



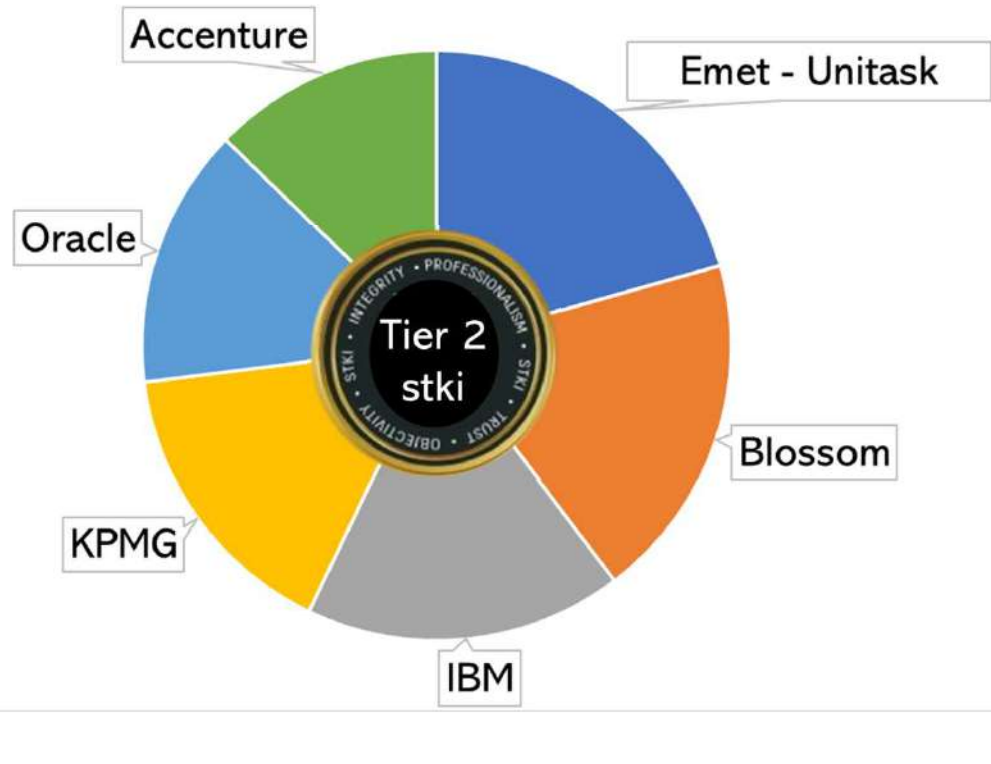
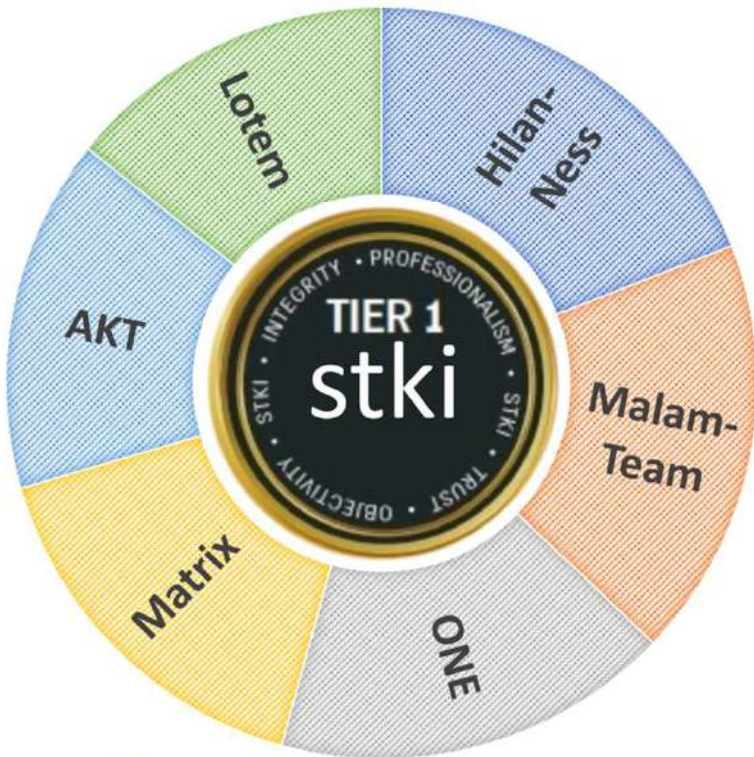
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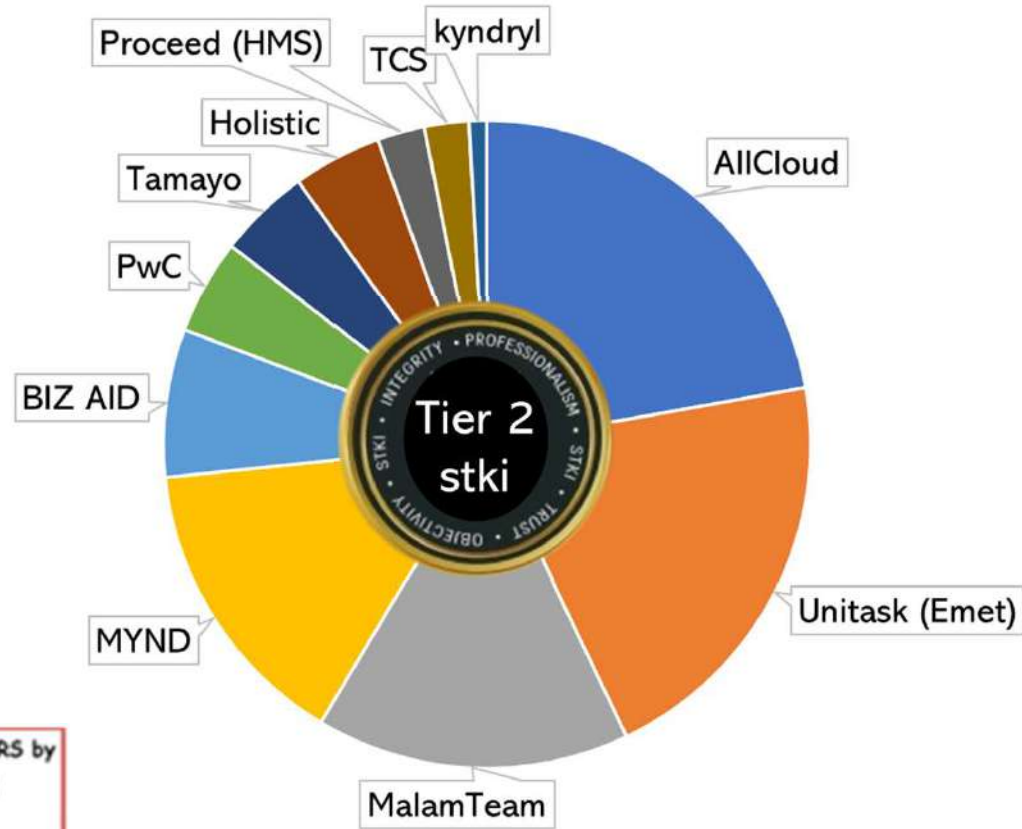
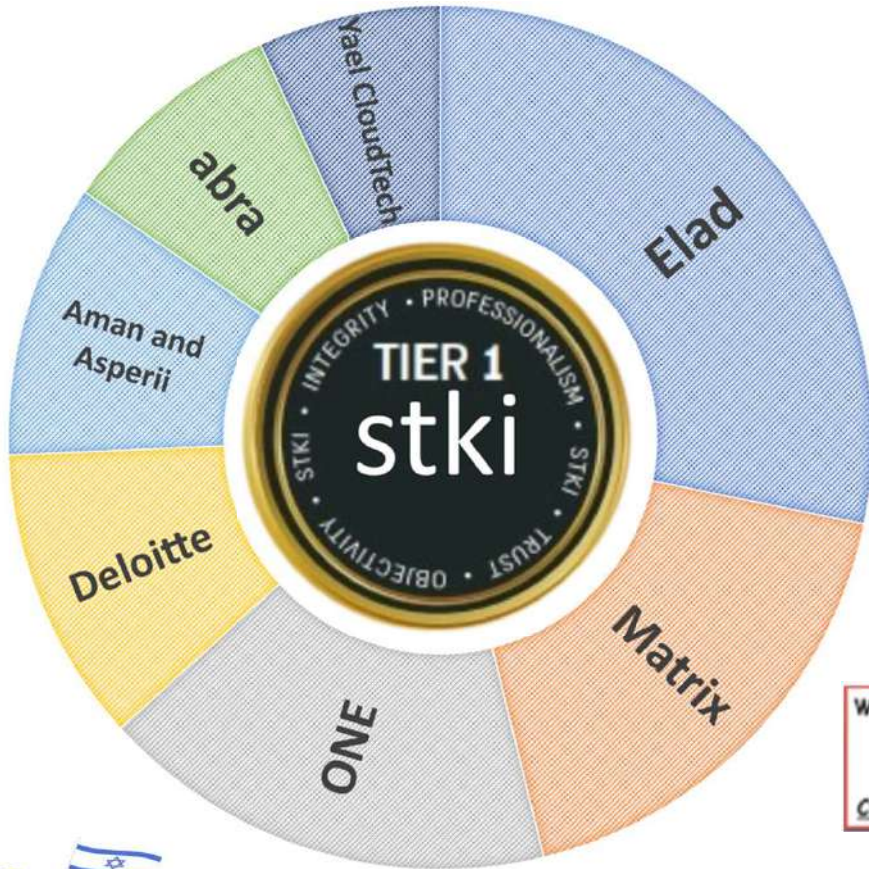
HR ,Talent Management & Payroll Implementations



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CRM Implementations



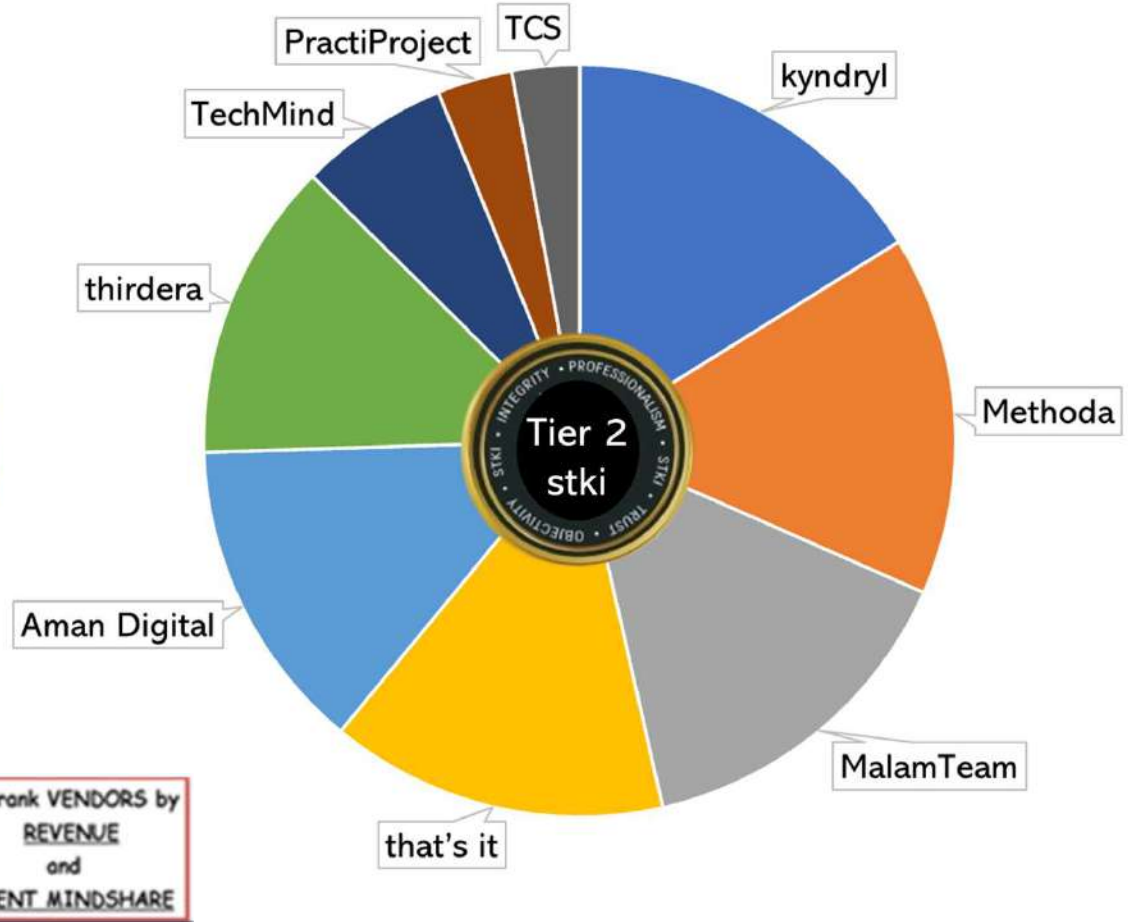
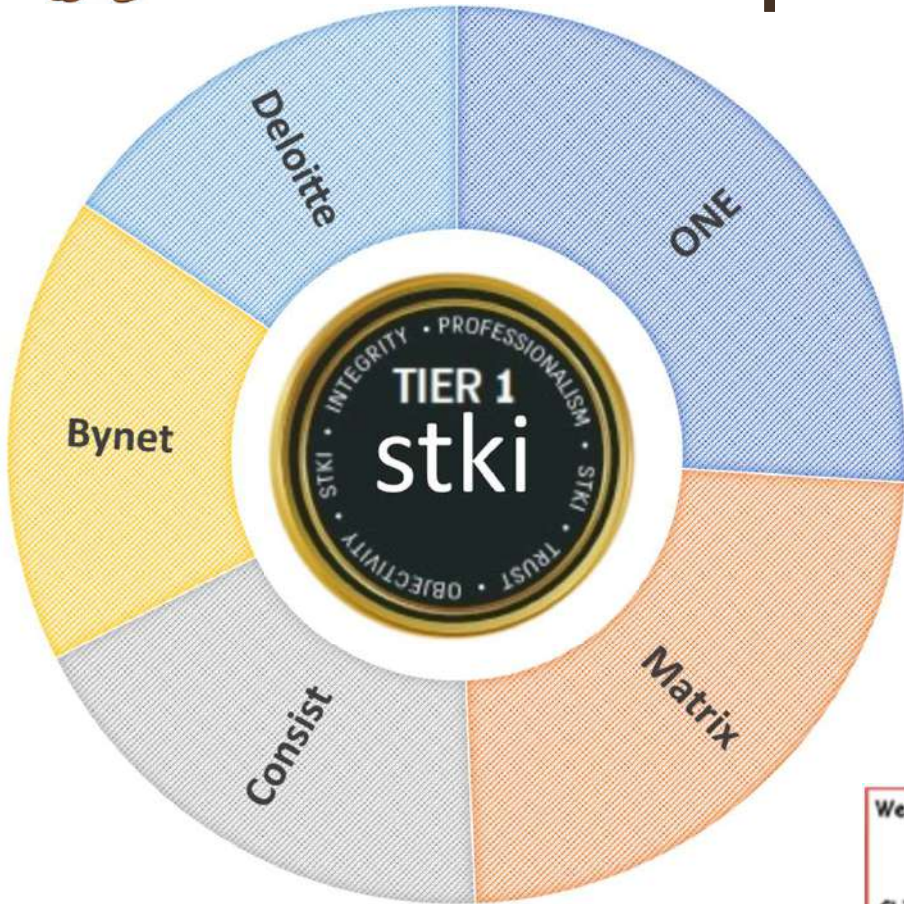
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ITSM Implementation



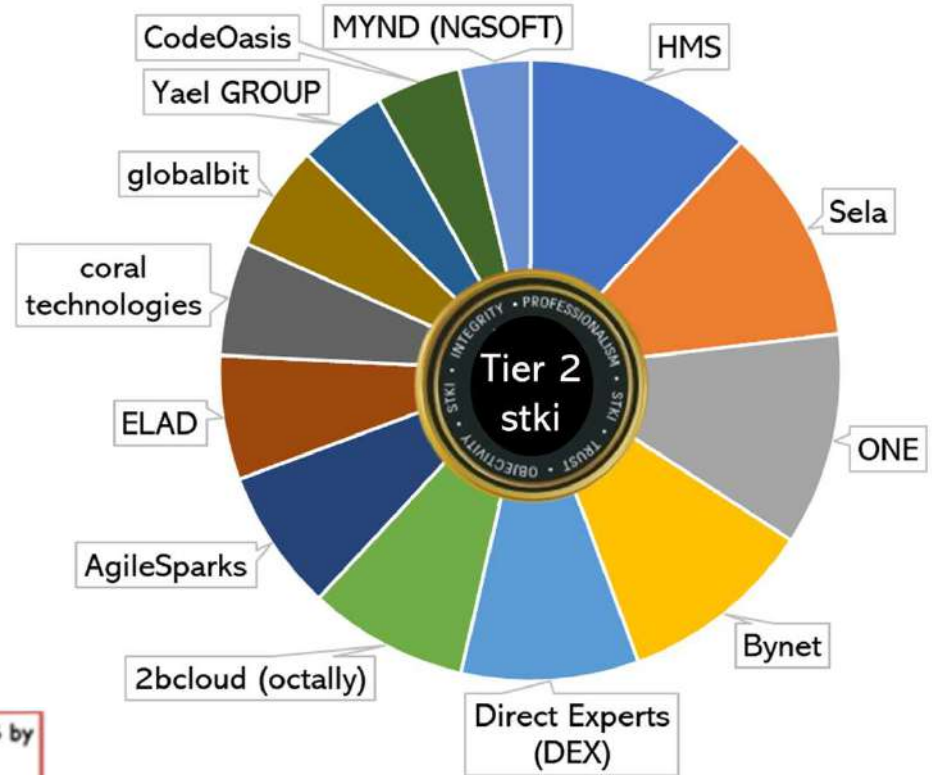
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ALM , Development & Testing tools implementation



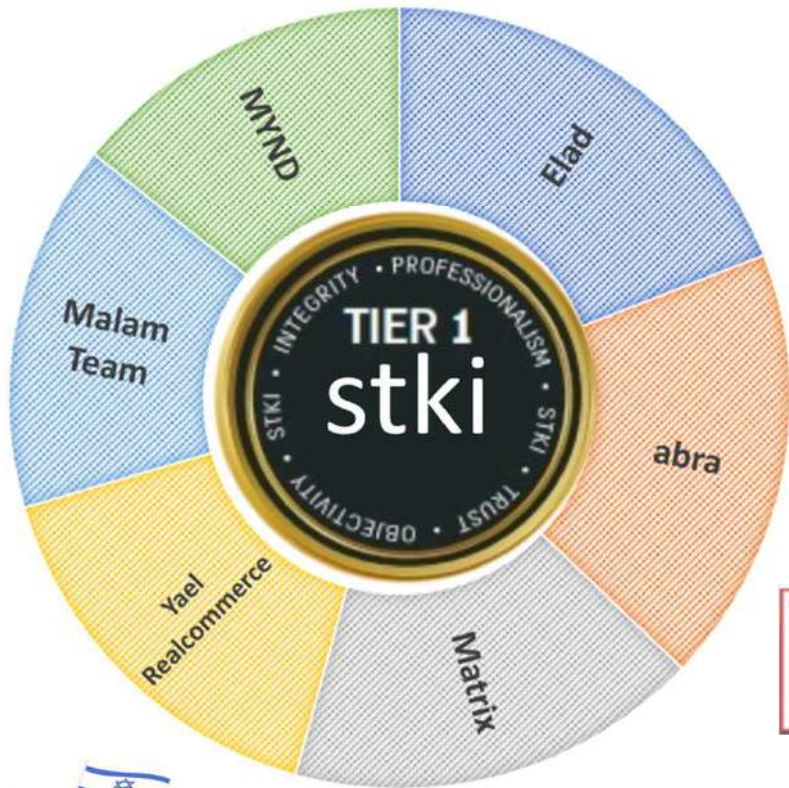
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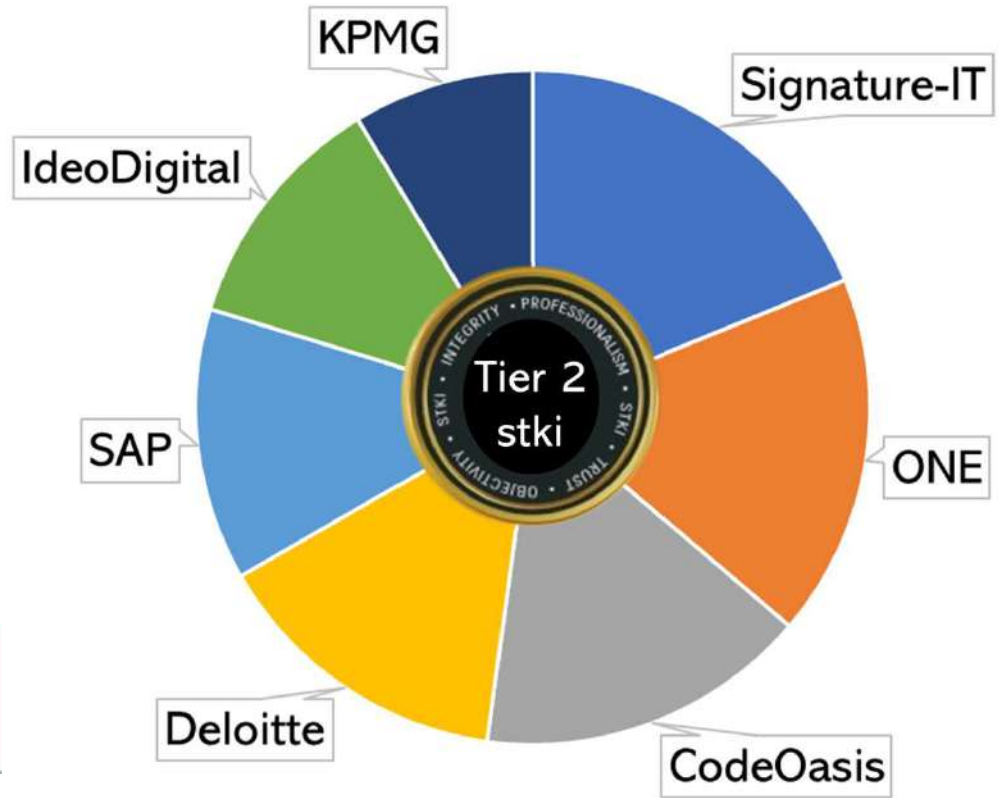
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E-Commerce and Marketplace Implementations



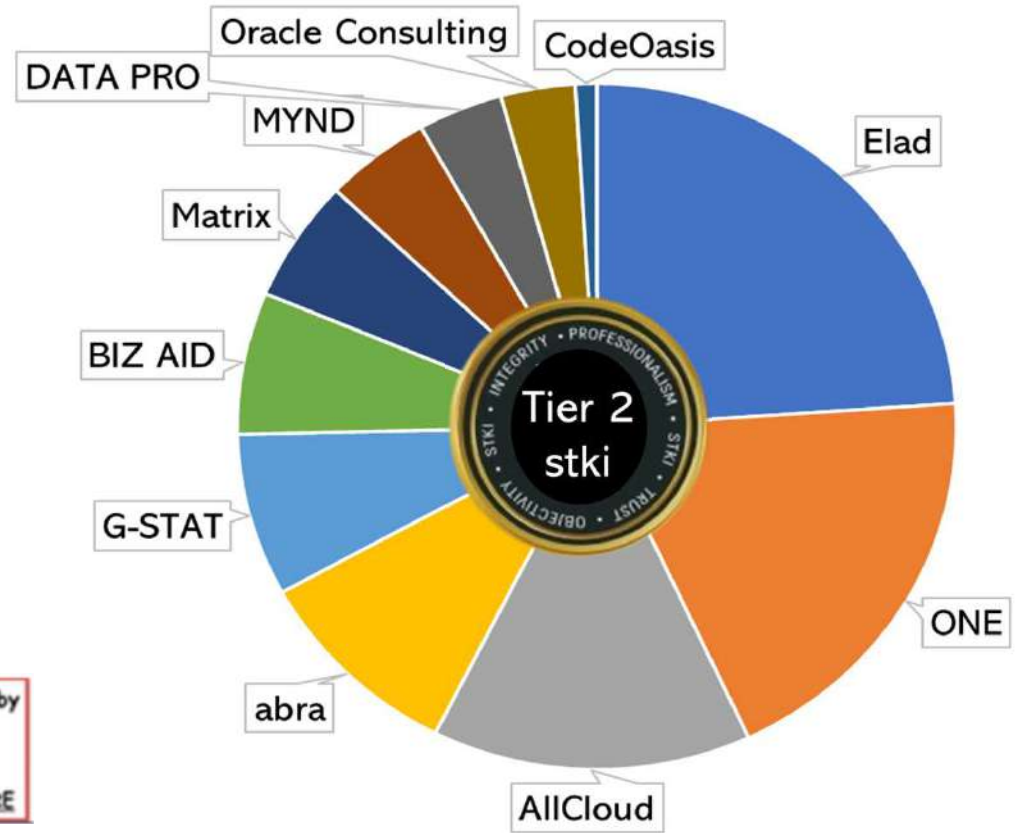
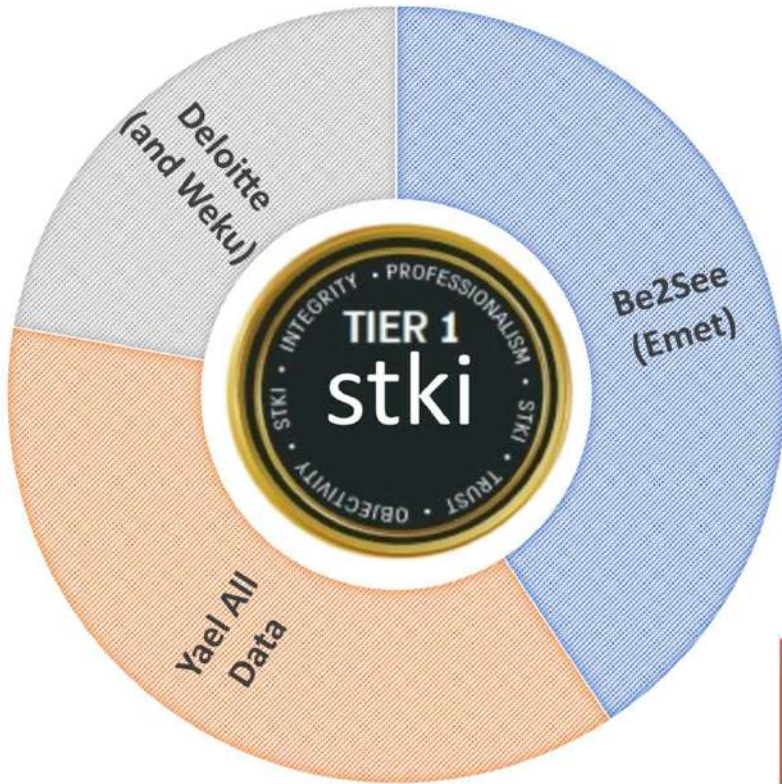
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Marketing Automation Implementations



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Data, Analytics, AI & BI Projects Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Advanced Analytics, Data Science and ML projects	2	400.00%	10	100.00%	20	40.00%	28	28.57%	36	5.56%	38	10.53%	42	11.90%	47	10.64%	52
GenerativeAI and LLM projects			18								9	44.44%	13	30.77%	17	29.41%	22
Data management implementation (quality, ETL, catalogs...)	60	5.00%	63	6.35%	67	7.46%	72	11.11%	80	-6.25%	75	-4.00%	72	8.33%	78	8.97%	85
BI implementation / development	42	7.14%	45	6.67%	48	8.33%	52	3.85%	54	-7.41%	50	-4.00%	48	-4.17%	46	-4.35%	44
Data & Analytics Cloud migration (enterprises) (help in migrating DW and Data Lakes to the cloud)							7	57.14%	11	54.55%	17	64.71%	28	53.57%	43	51.16%	65
TOTALS	104	30.77%	136	-0.74%	135	17.78%	159	13.84%	181	4.42%	189	7.41%	203	13.79%	231	16.02%	268

Values in Million USD

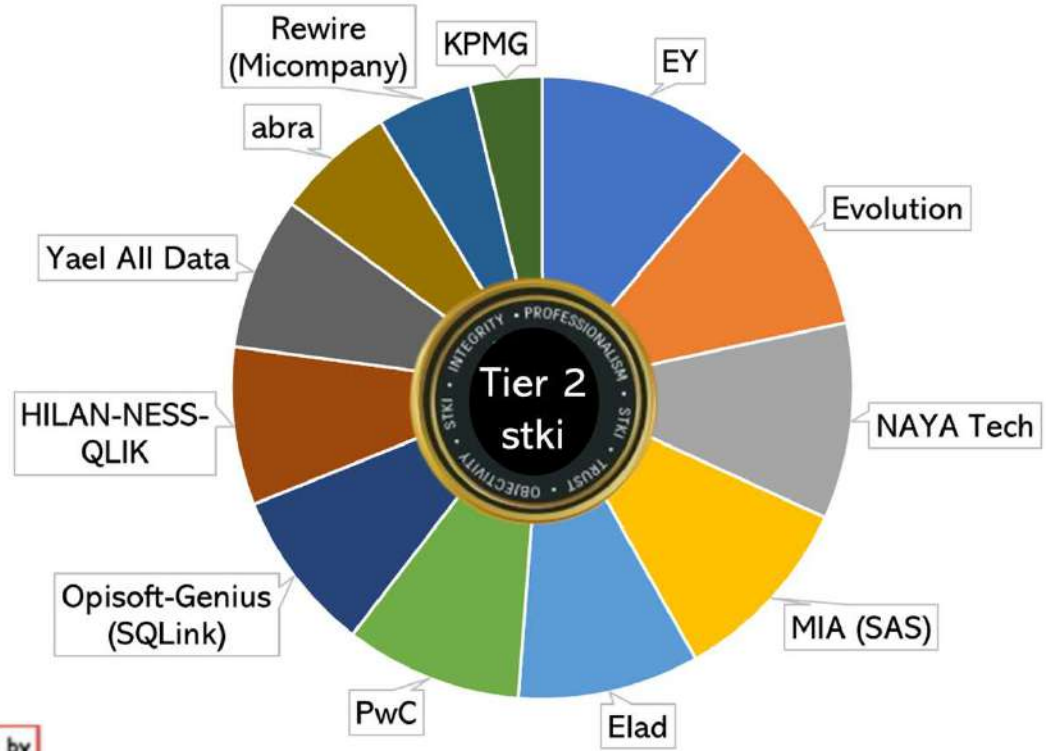
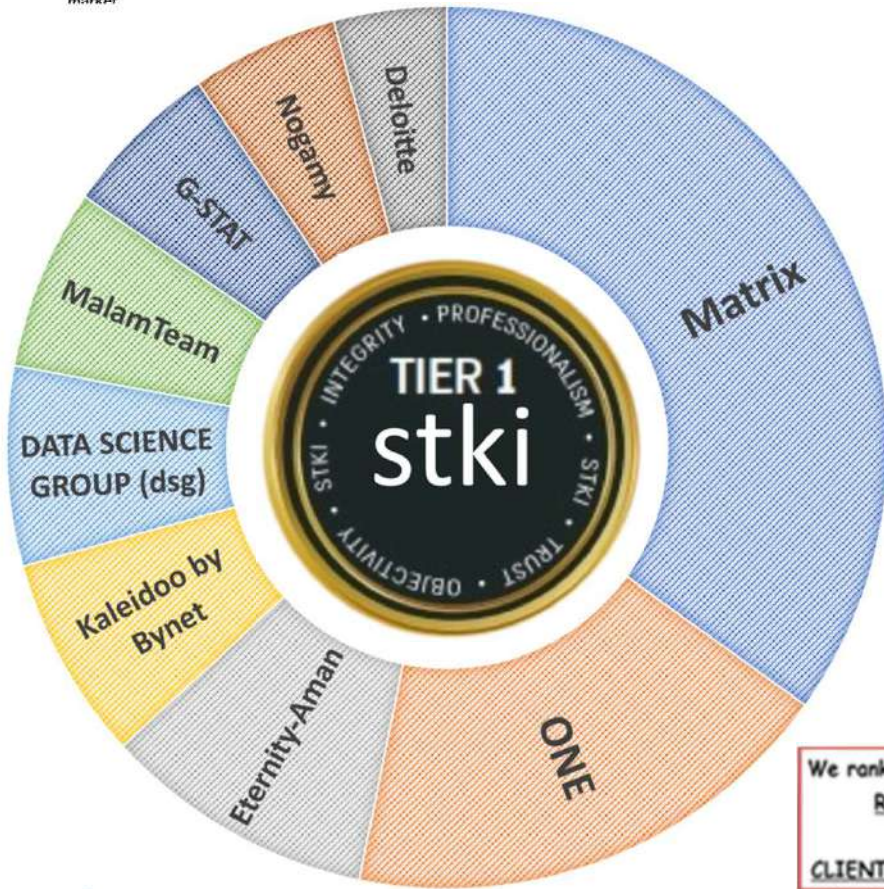


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Advanced Analytics, Data Science and ML projects



value added services market

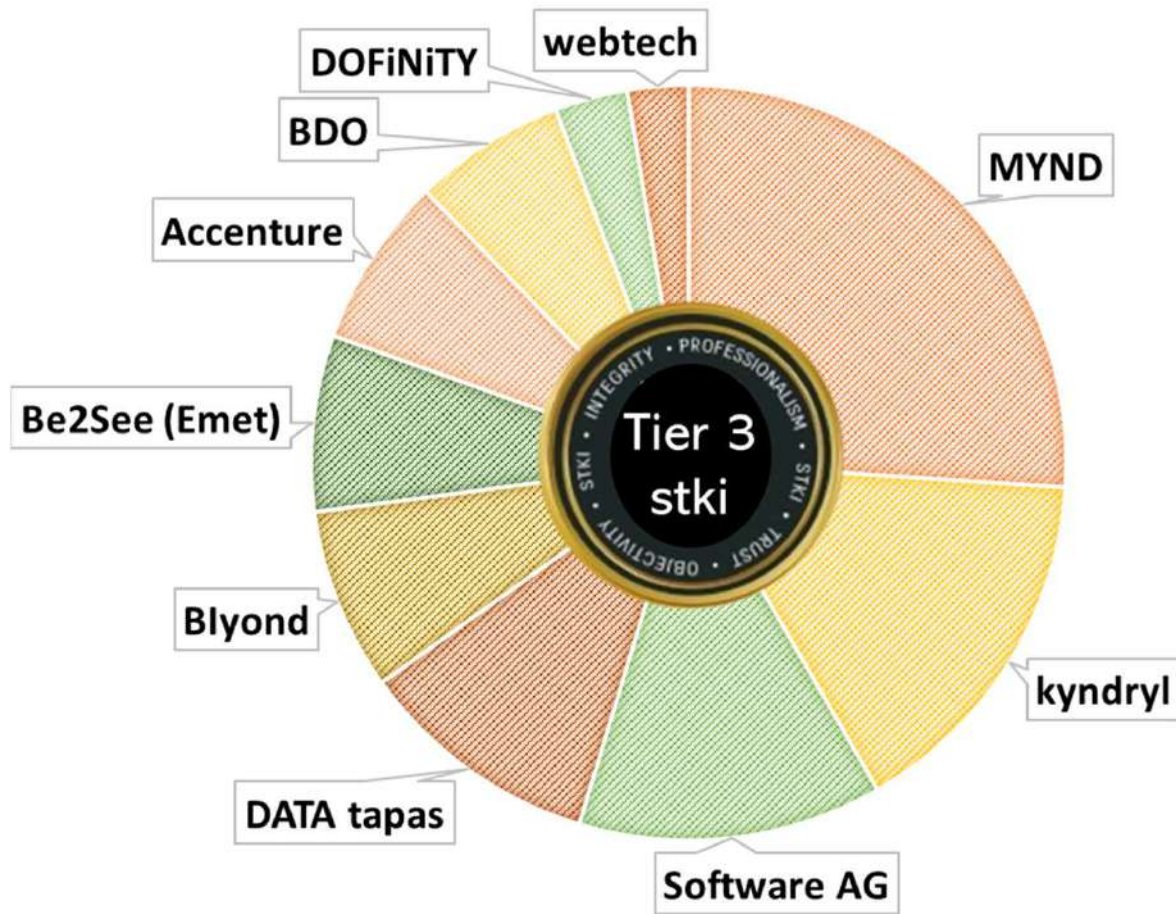


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Advanced Analytics, Data Science and ML projects



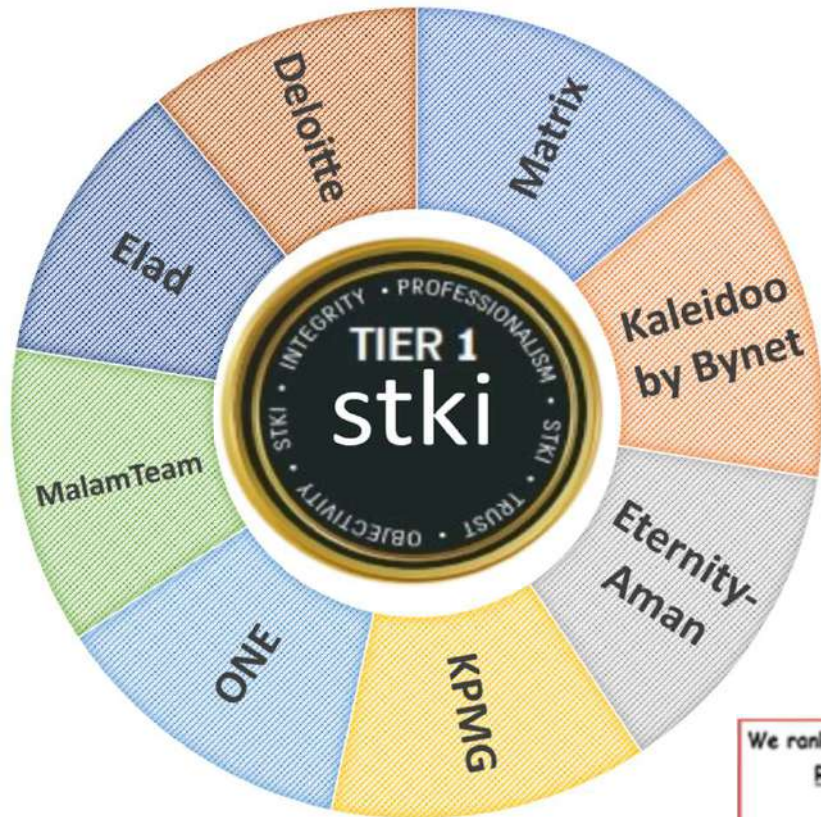
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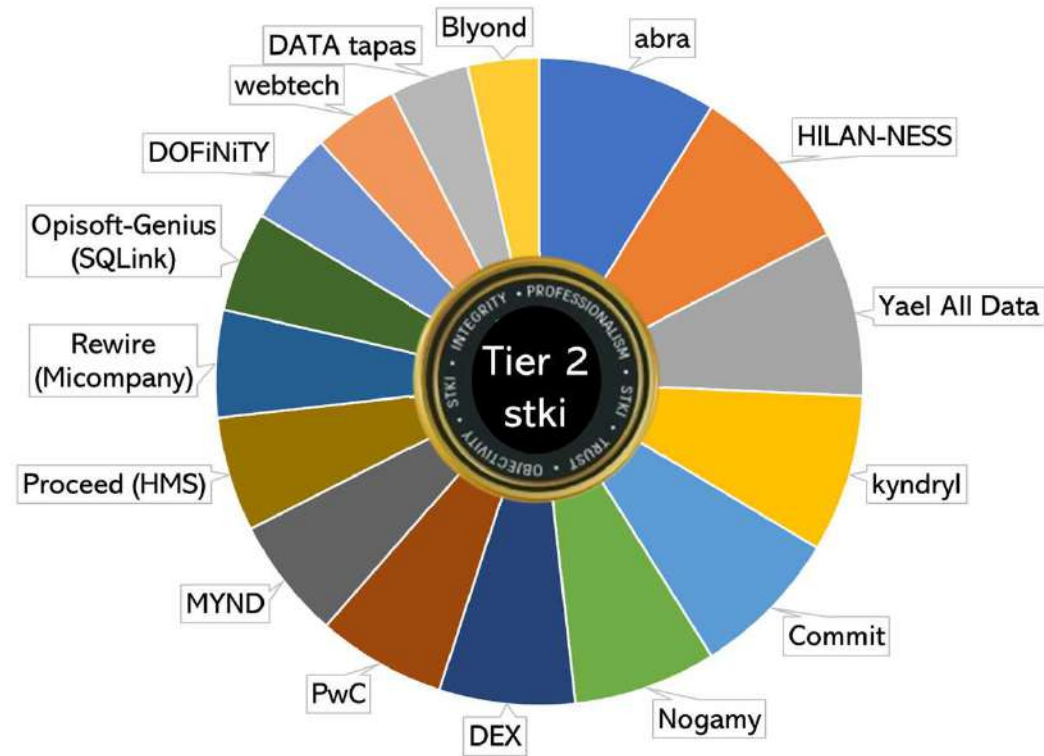
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GenerativeAI and LLM projects



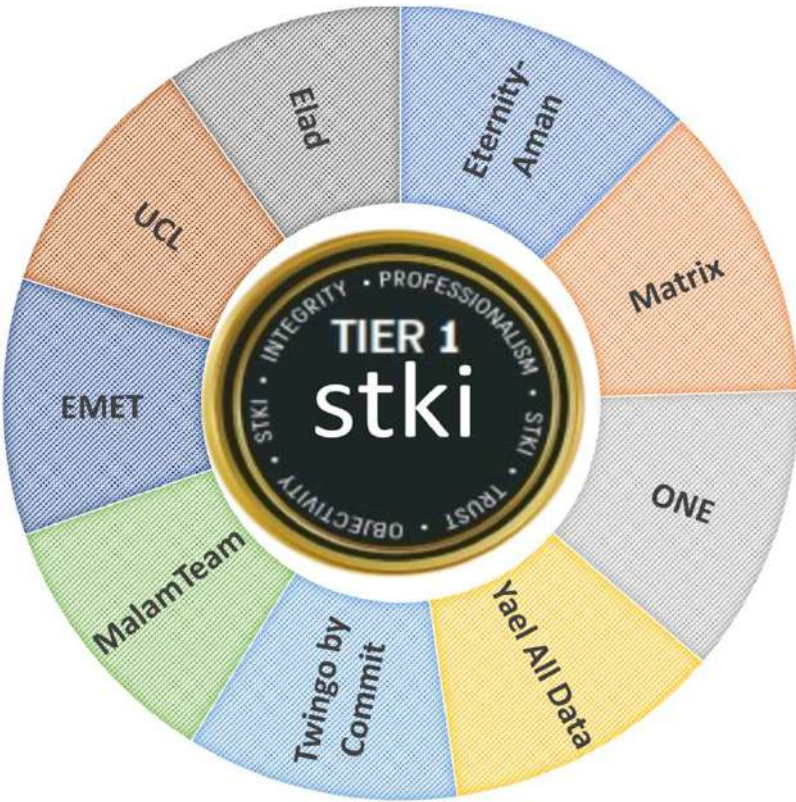
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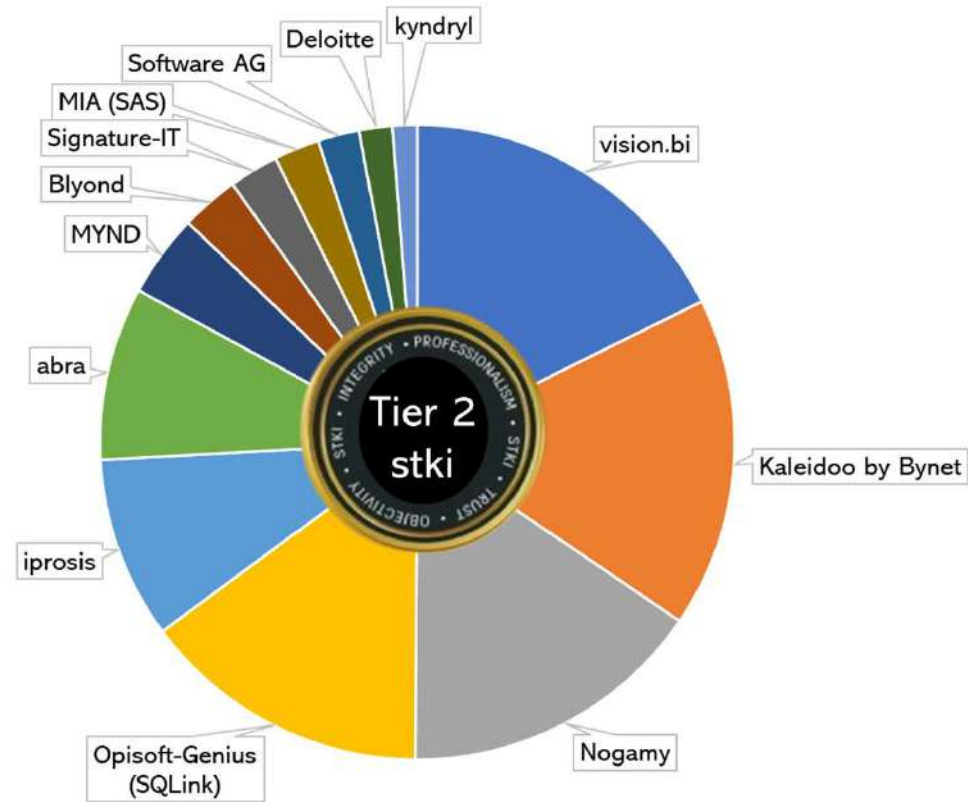
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Data Management Implementation (quality, ETL, catalogs)



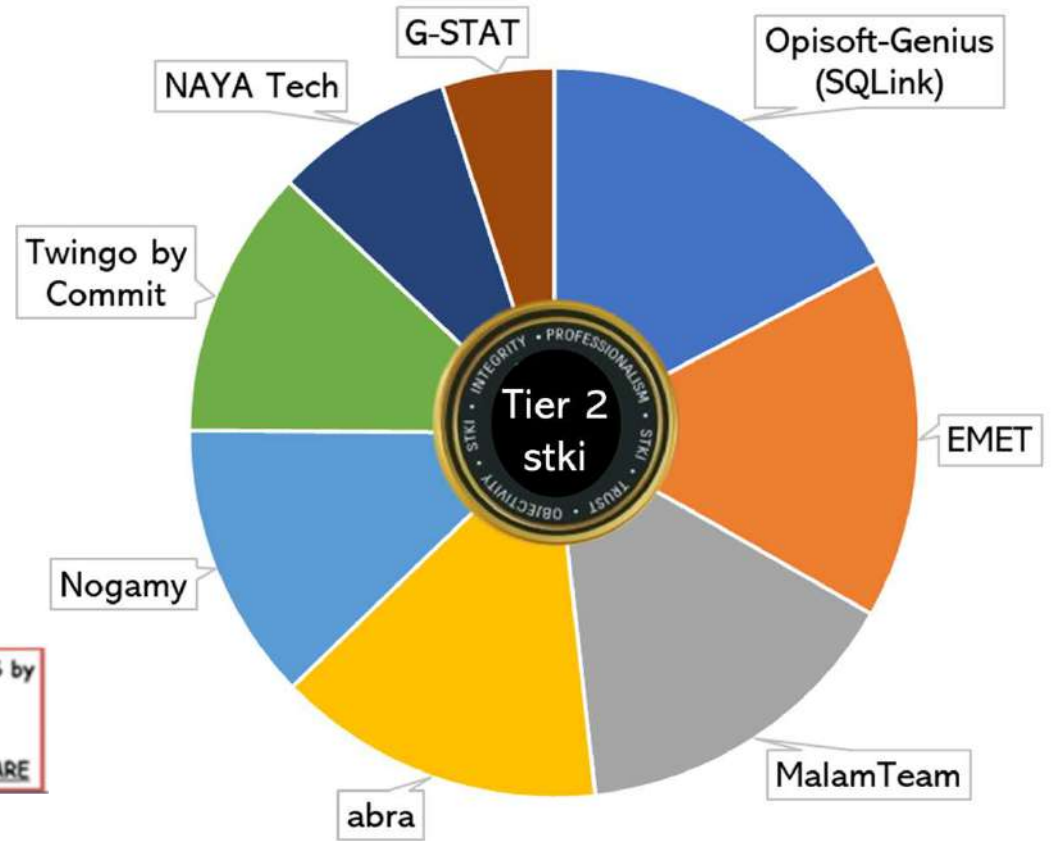
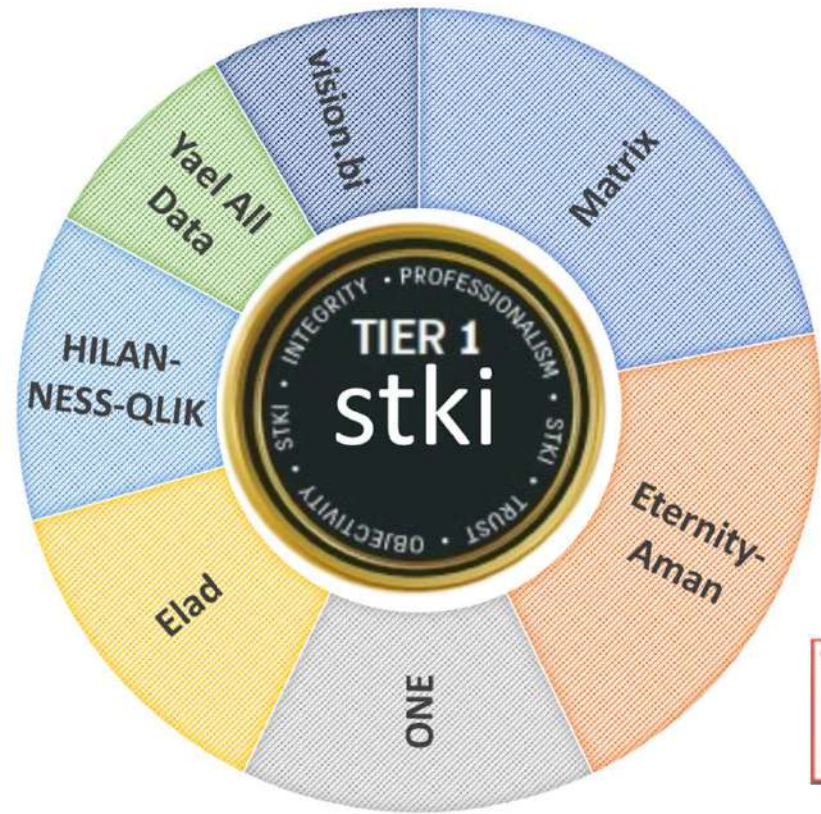
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BI Implementation / Development

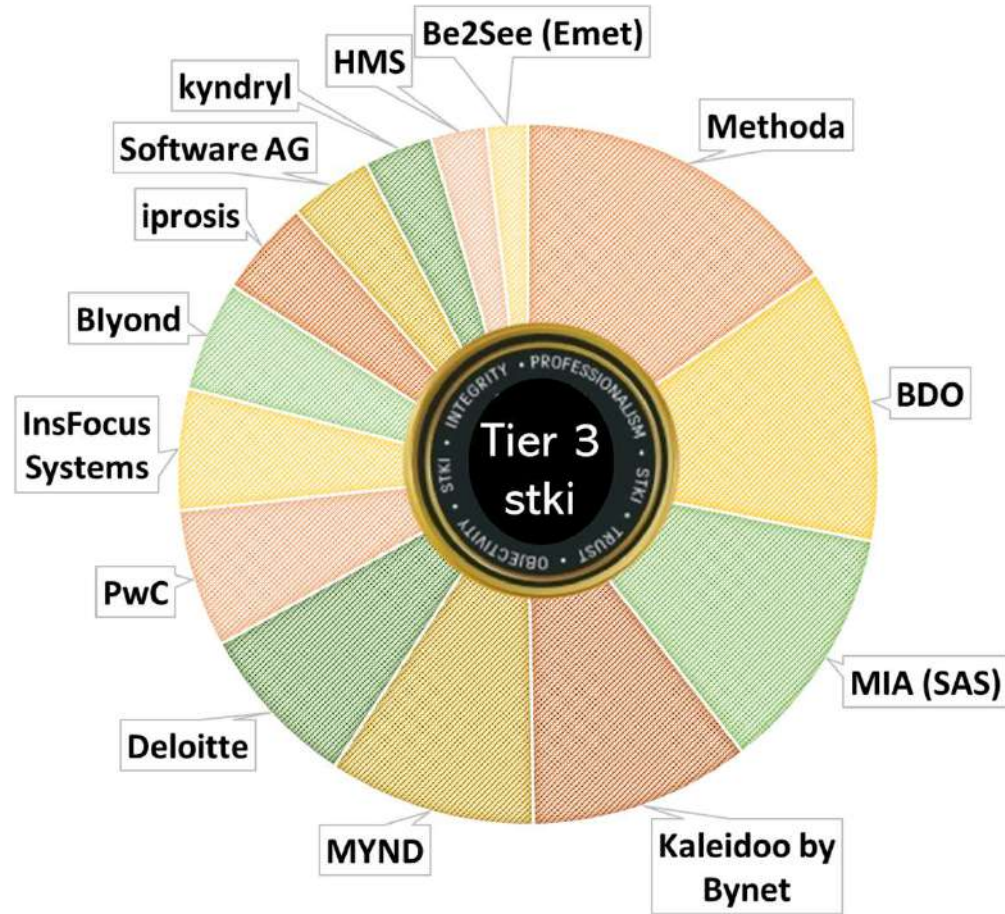


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BI Implementation / Development



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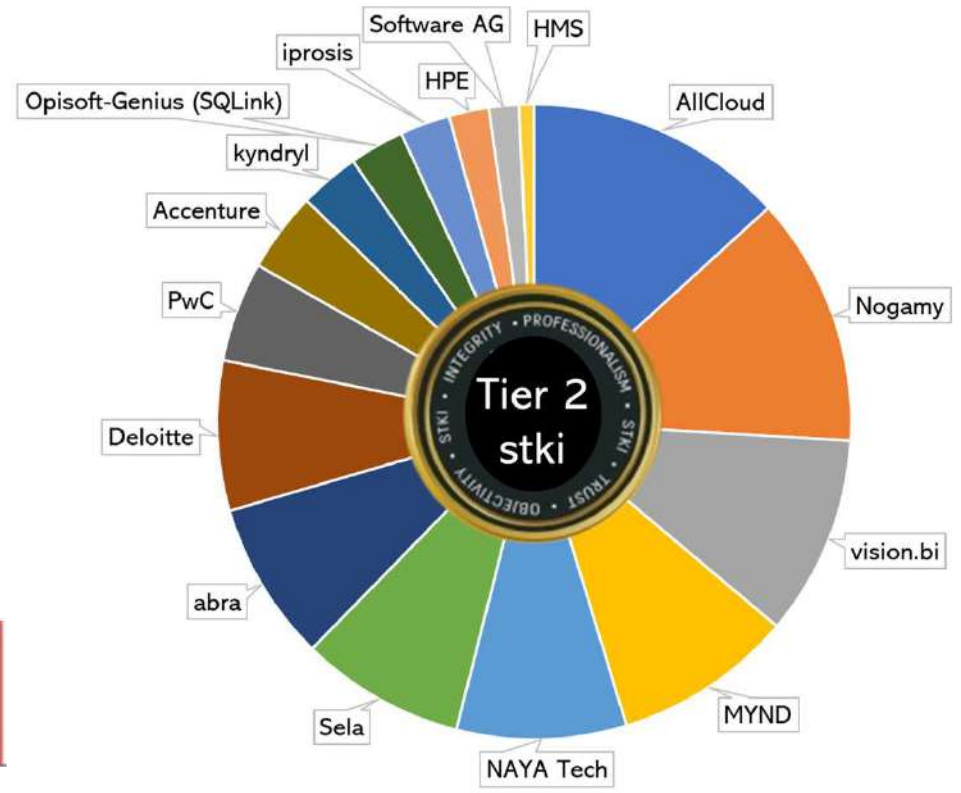


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Data & Analytics Cloud migration (help in migrating DW and Data Lakes to the Cloud)



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Business Applications Development & Implementations Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
General Software Development	105	11.43%	117	-18.80%	95	36.84%	130	-3.85%	125	-4.00%	120	4.17%	125	18.40%	148	18.24%	175
Product Design (UX)	77	10.39%	85	21.18%	103	23.30%	127	22.05%	155	-9.68%	140	-5.71%	132	10.61%	146	19.86%	175
TOTALS	182	10.99%	202	-1.98%	198	29.80%	257	8.95%	280	-7.14%	260	-1.15%	257	14.40%	294	19.05%	350

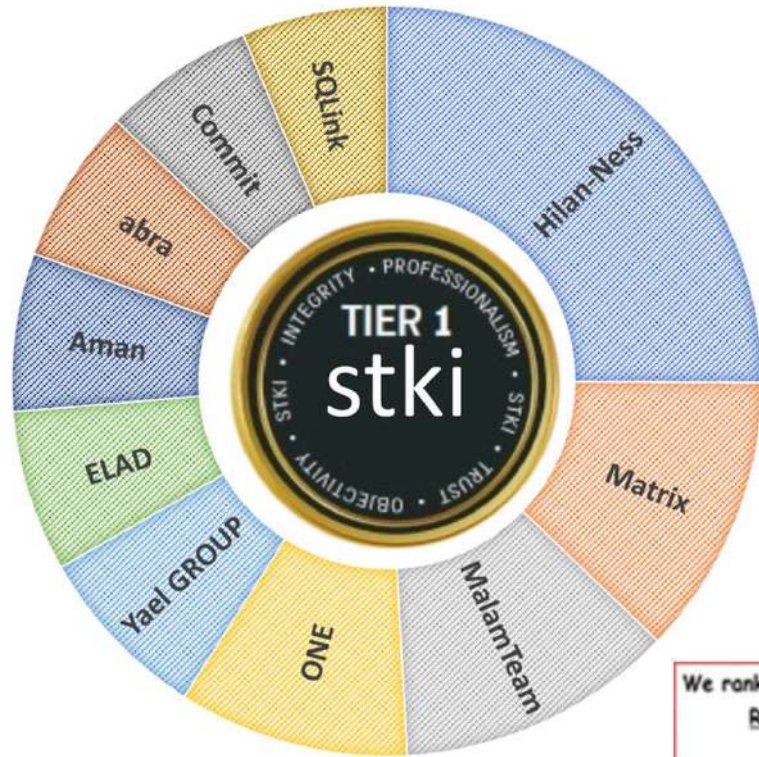
Values in Million USD



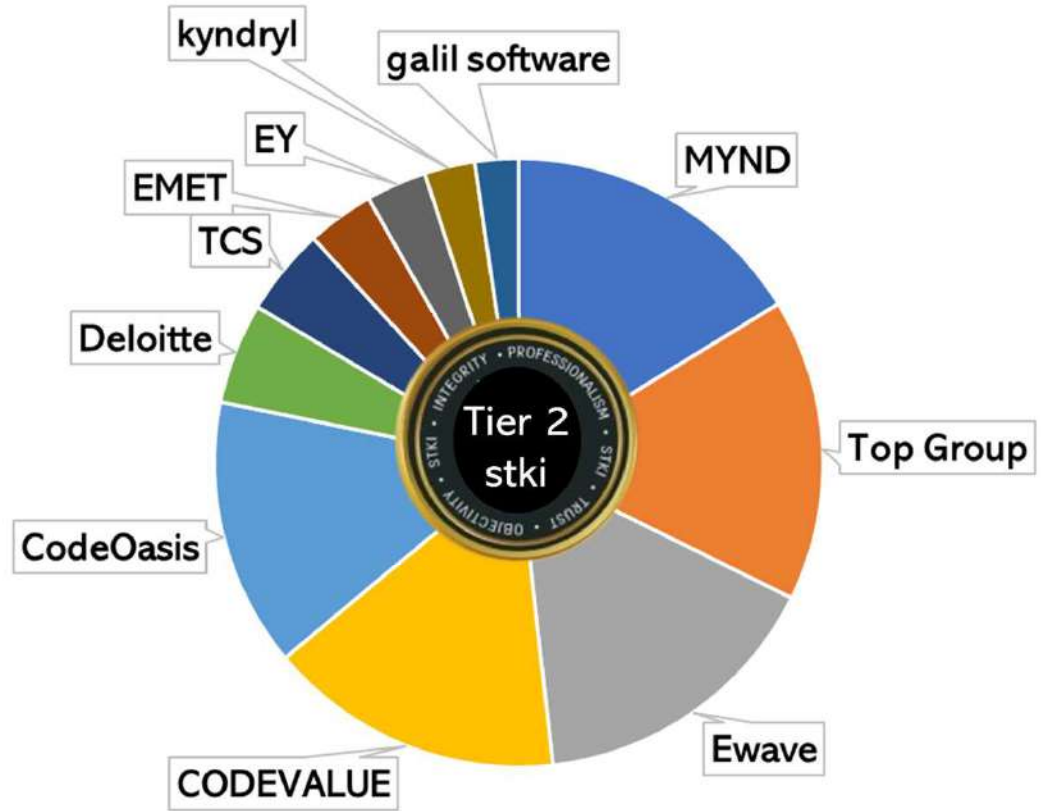
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General Software Development Projects

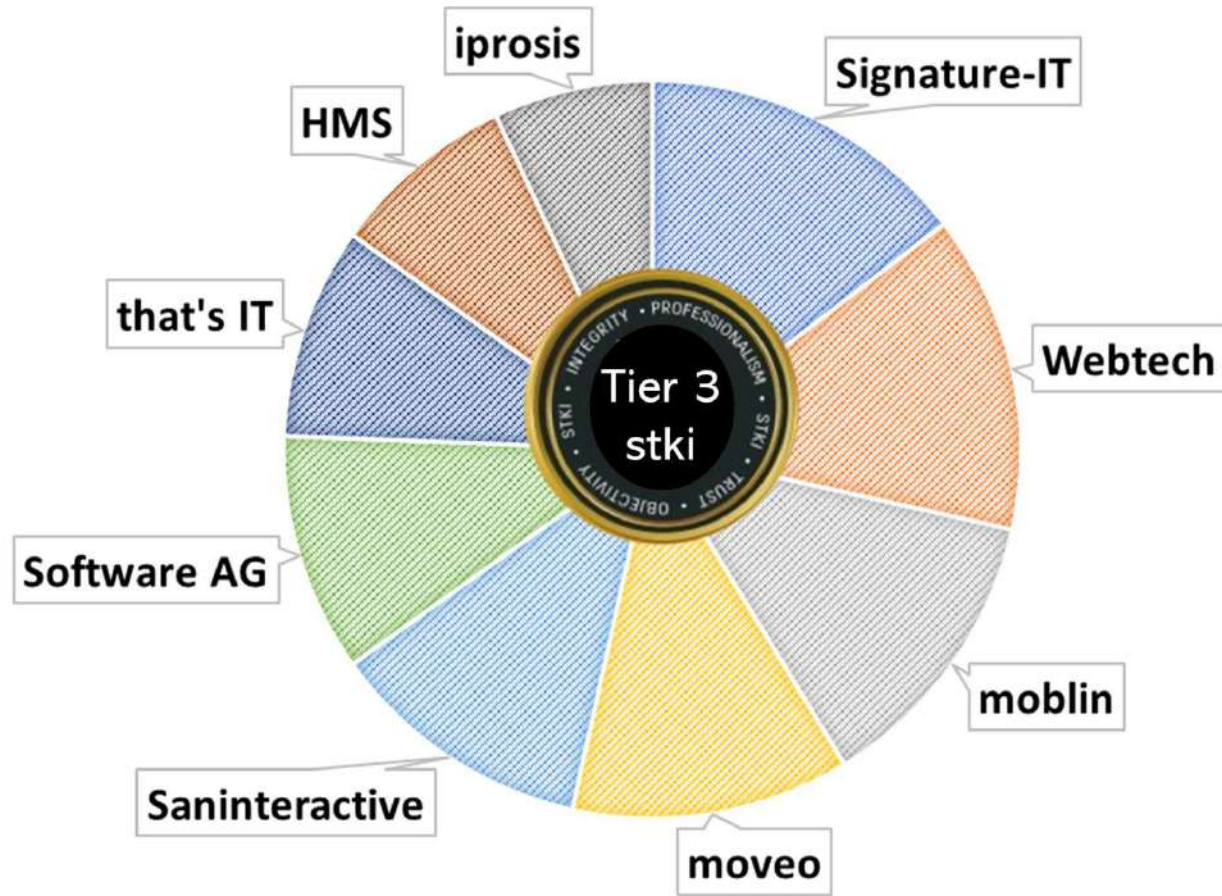


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General Software Development Projects



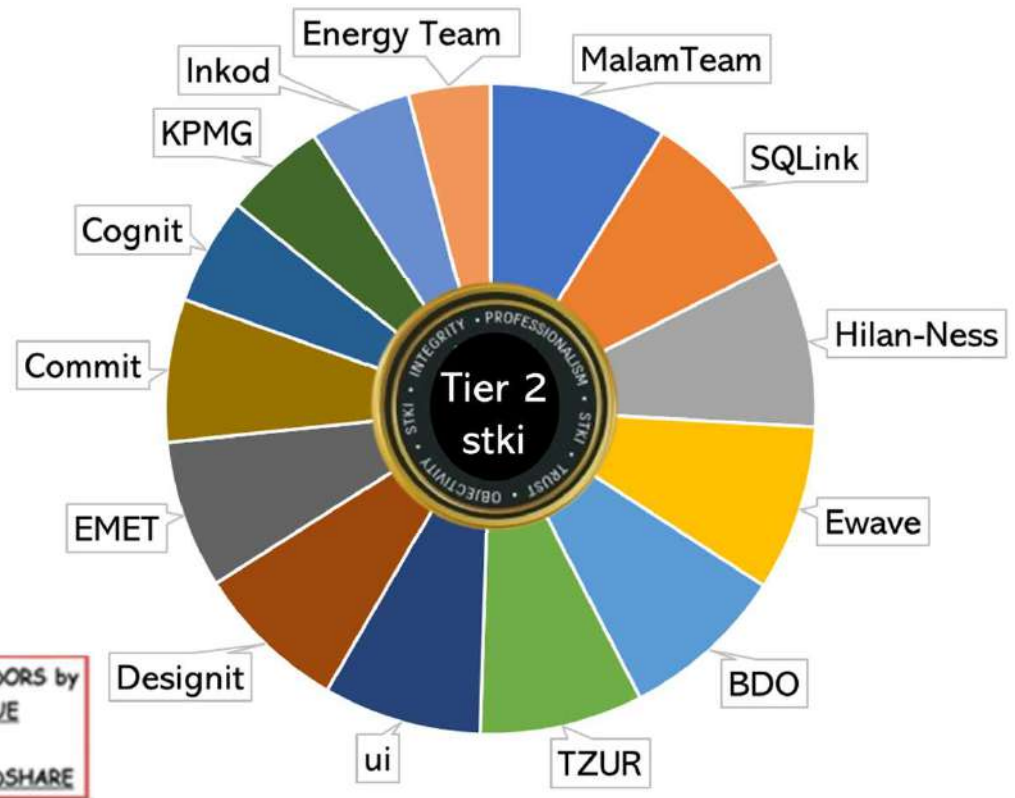
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UX Design



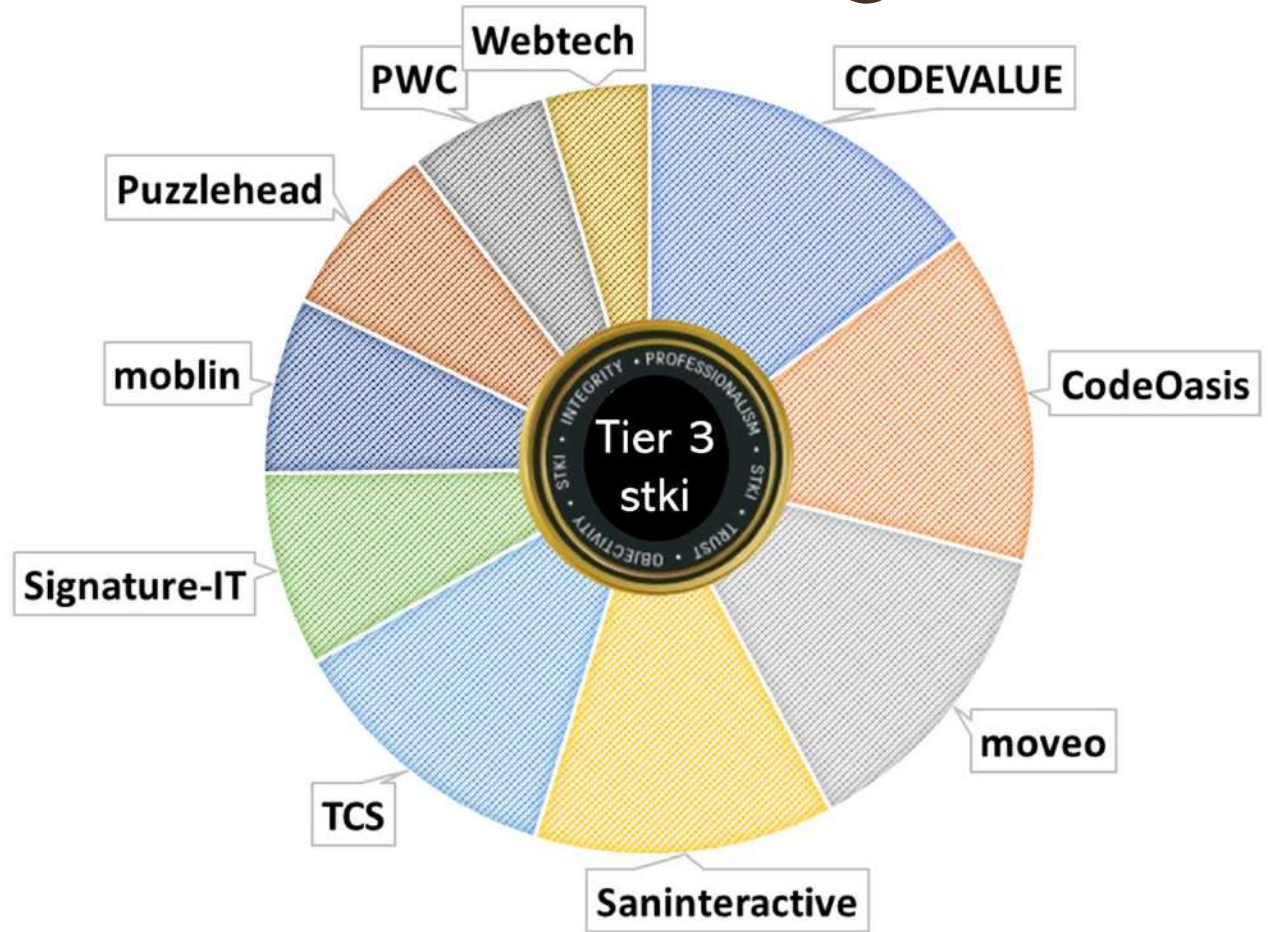
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Industry Specific & Special Purpose Development & Implementations Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Finance Industry Core Projects	150	33.33%	200	-35.00%	130	-15.38%	110	9.09%	120	-37.50%	75	-9.33%	68	10.29%	75	26.67%	95
Transportation	50	20.00%	60	25.00%	75	13.33%	85	12.94%	96	-16.67%	80	2.50%	82	9.76%	90	8.89%	98
Public (COVID19 & post 7/10) Projects					120	-58.33%	50				30	66.67%	50				
e-payments Projects			8	337.50%	35	28.57%	45	37.78%	62	-3.23%	60	-3.33%	58	20.69%	70	14.29%	80
Retail Projects			20	110.00%	42	78.57%	75	26.67%	95	-15.79%	80	-6.25%	75	6.67%	80	12.50%	90
Public (government) modernizations	60	8.33%	65	-46.15%	35	28.57%	45	33.33%	60	16.67%	70	18.57%	83	20.48%	100	22.00%	122
Location Based Projects	50	30.00%	65	23.08%	80	12.50%	90	5.56%	95	10.53%	105	14.29%	120	9.17%	131	8.40%	142
Self-Service & Robots Projects	20	25.00%	25	0.00%	25	40.00%	35	28.57%	45	4.44%	47	8.51%	51	17.65%	60	20.00%	72
Tele-medicine Projects	5	50.00%	8	100.00%	15	66.67%	25	40.00%	35	5.71%	37	16.22%	43	20.93%	52	15.38%	60
TOTALS	335	34.48%	451	23.64%	557	0.54%	560	8.57%	608	-3.95%	584	7.88%	630	4.44%	658	15.35%	759

Values in Million USD



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Engagement & Knowledge Management Projects Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Contact Center and Multi channel engagement projects	45	6.67%	48	35.42%	65	15.38%	75	6.67%	80	-12.50%	70	21.43%	85	9.41%	93	9.68%	102
Employee Collaboration, Task Management & Engagement Tools Implementations	10	25.00%	13	140.00%	30	16.67%	35	20.00%	42	-4.76%	40	-5.00%	38	10.53%	42	11.90%	47
Knowledge Management (ECM, Portals, Search, Knowledgebases) Implementations	78	7.69%	84	-10.71%	75	6.67%	80	6.25%	85	-11.76%	75	-6.67%	70	-8.57%	64	12.50%	72
TOTALS	133	8.65%	145	17.65%	170	11.76%	190	8.95%	207	-10.63%	185	4.32%	193	3.11%	199	11.06%	221

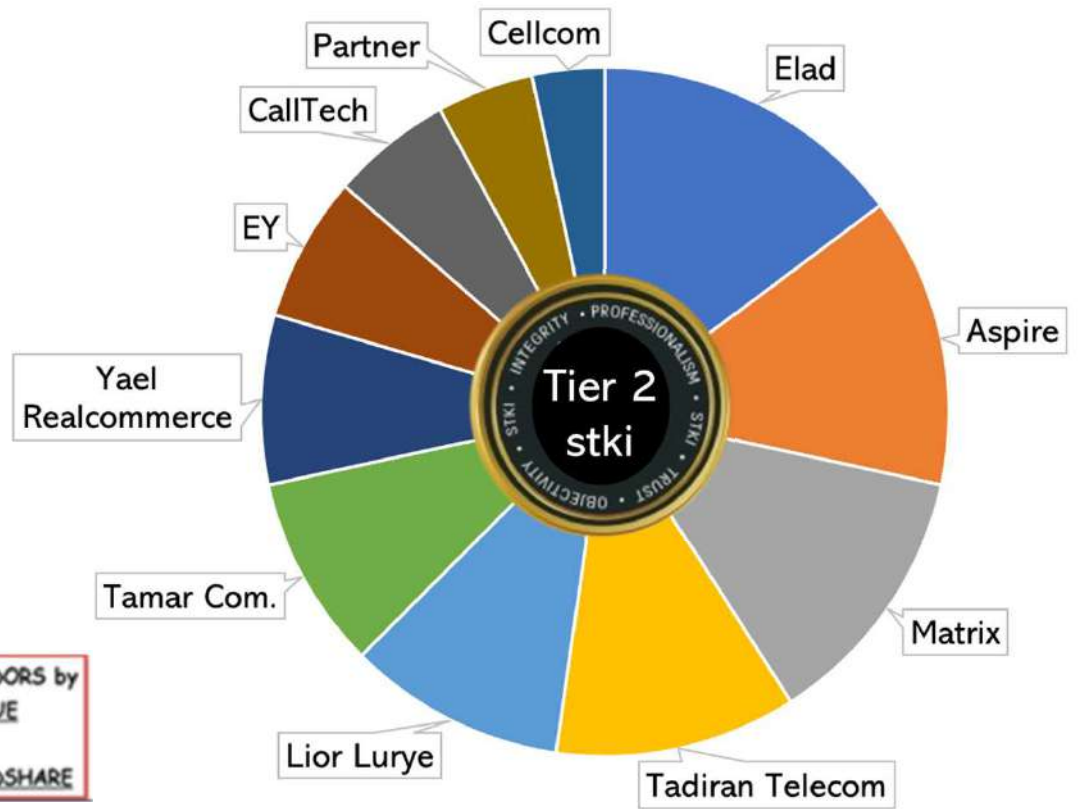
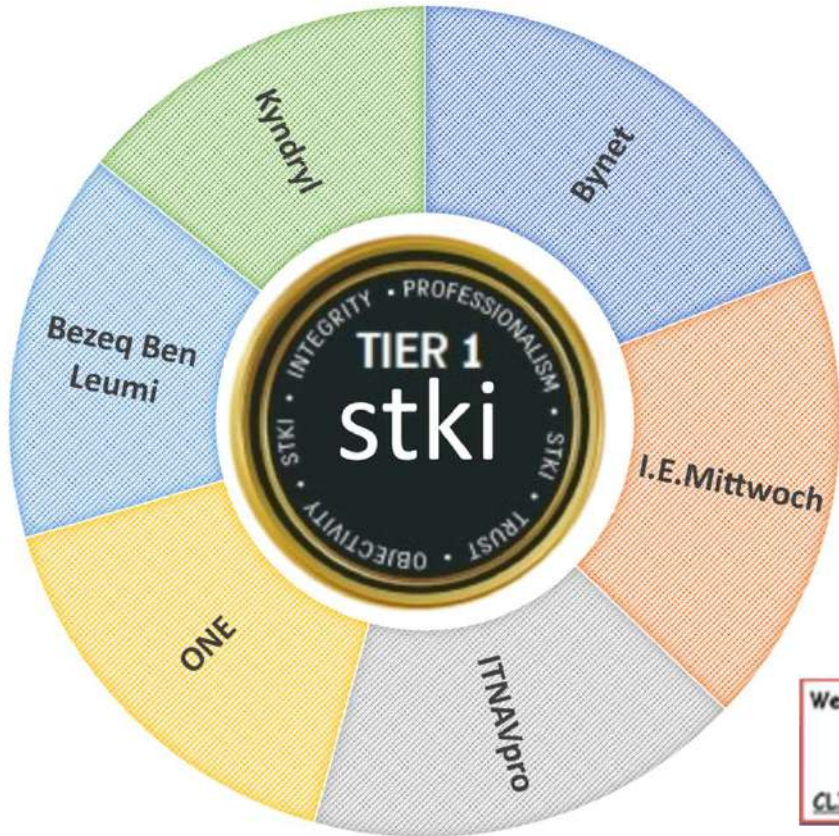
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Contact Center & Multi Channel Engagement Projects



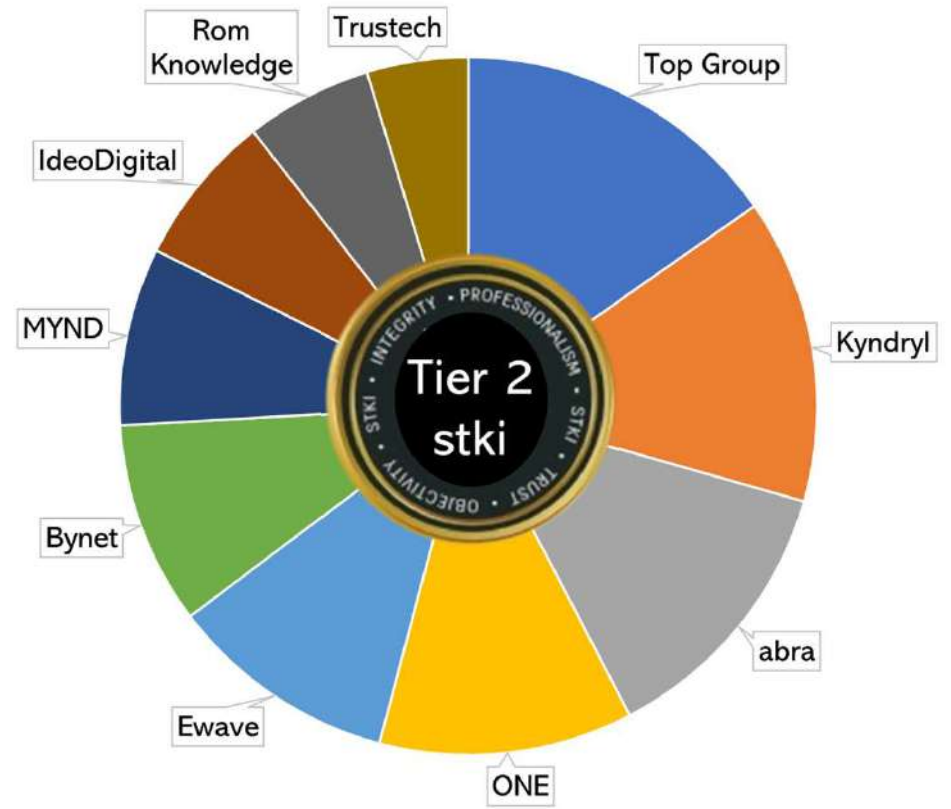
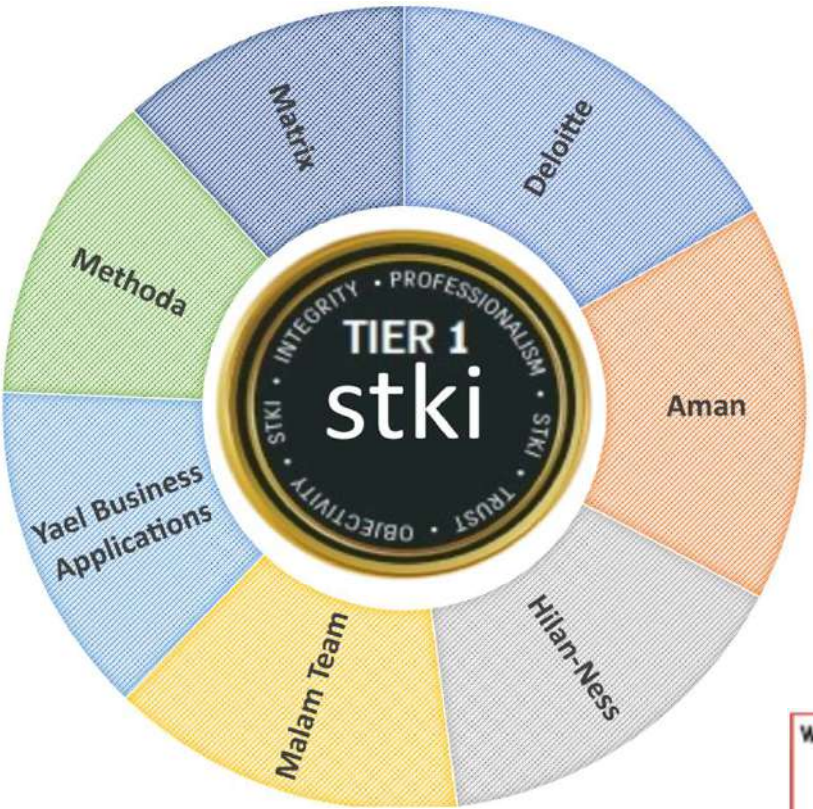
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Employee Collaboration & Engagement Projects



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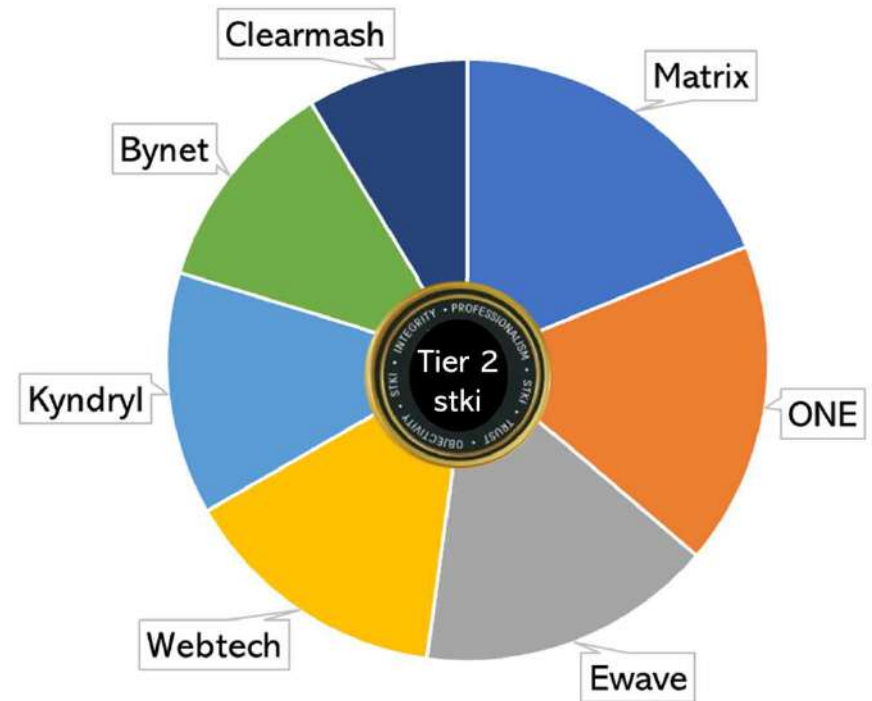
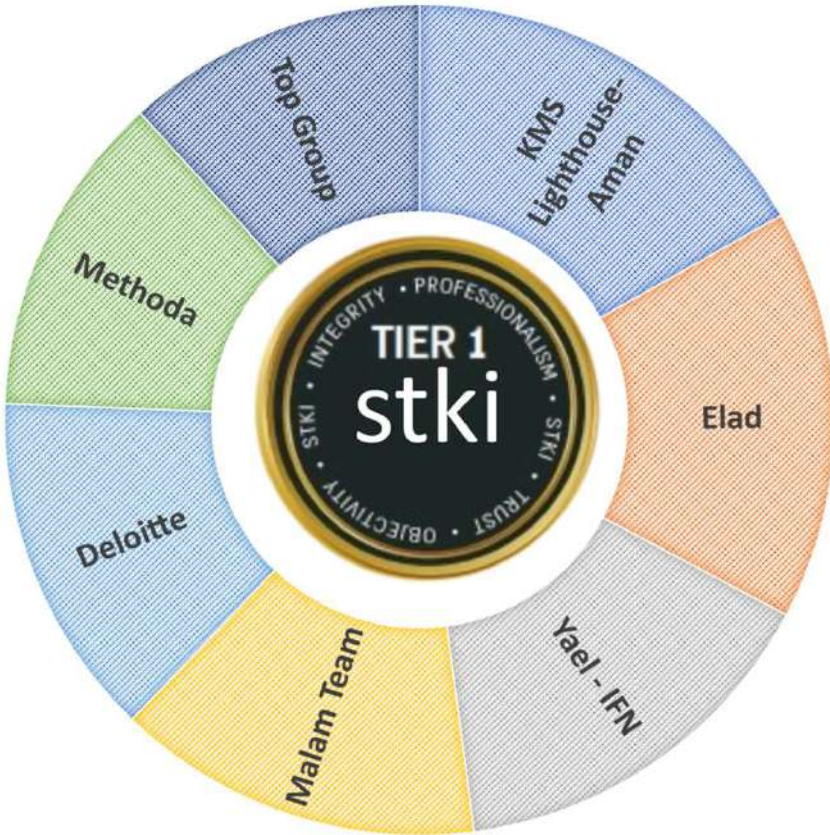


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Knowledge Management Projects



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Innovation Projects & Implementations Market 2018-2026

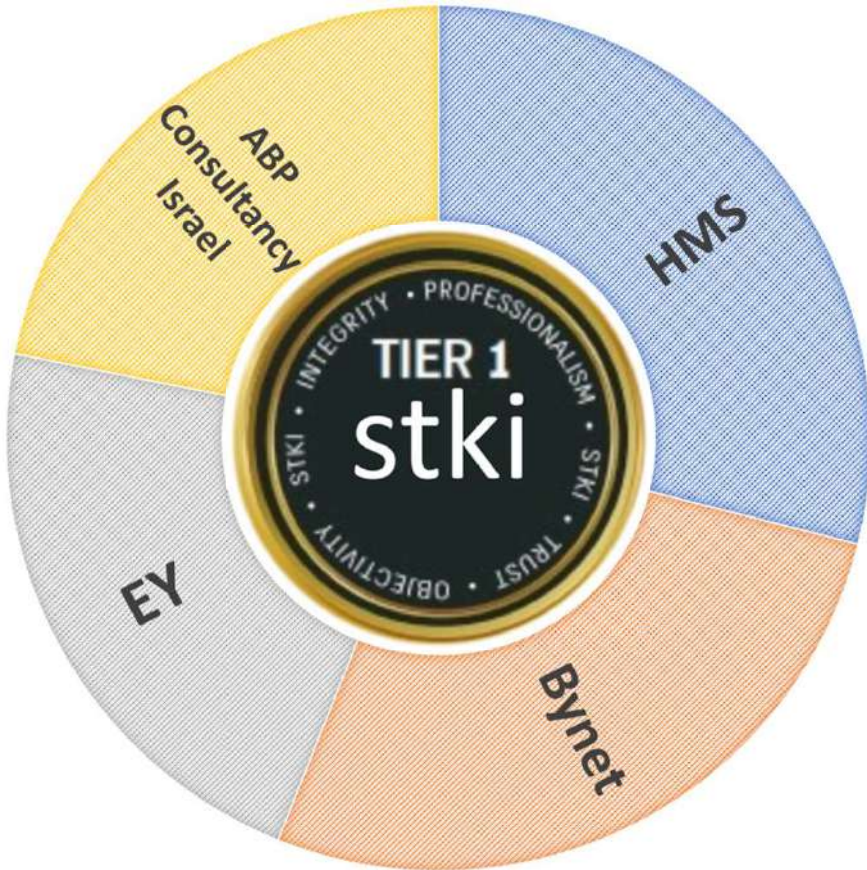
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Technological Innovation Projects	20	25.00%	25	-60.00%	10	80.00%	18	38.89%	25	-20.00%	20	-25.00%	15	66.67%	25	40.00%	35
Automation tools (RPA, OCR) Implementations	3	36.67%	4	509.76%	25	12.00%	28	7.14%	30	-16.67%	25	-12.00%	22	22.73%	27	25.93%	34
Blockchain projects	1	50.00%	2	166.67%	4	50.00%	6	66.67%	10	-60.00%	4	-25.00%	3	66.67%	5	60.00%	8
IoT Projects	4	114.29%	8	-33.33%	5	30.00%	7	53.85%	10	20.00%	12	33.33%	16	25.00%	20	25.00%	25
TOTALS	28	38.55%	38	15.49%	44	32.95%	59	28.21%	75	-18.67%	61	-8.20%	56	37.50%	77	32.47%	102

Values in Million USD

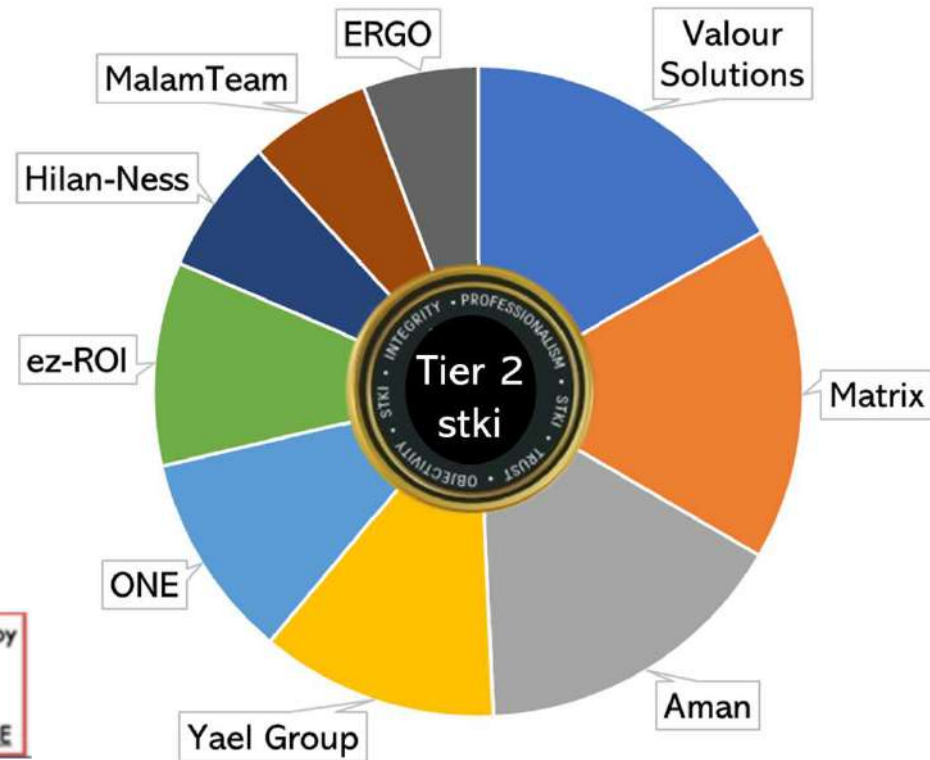


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Automation tools (RPA, OCR) Implementations



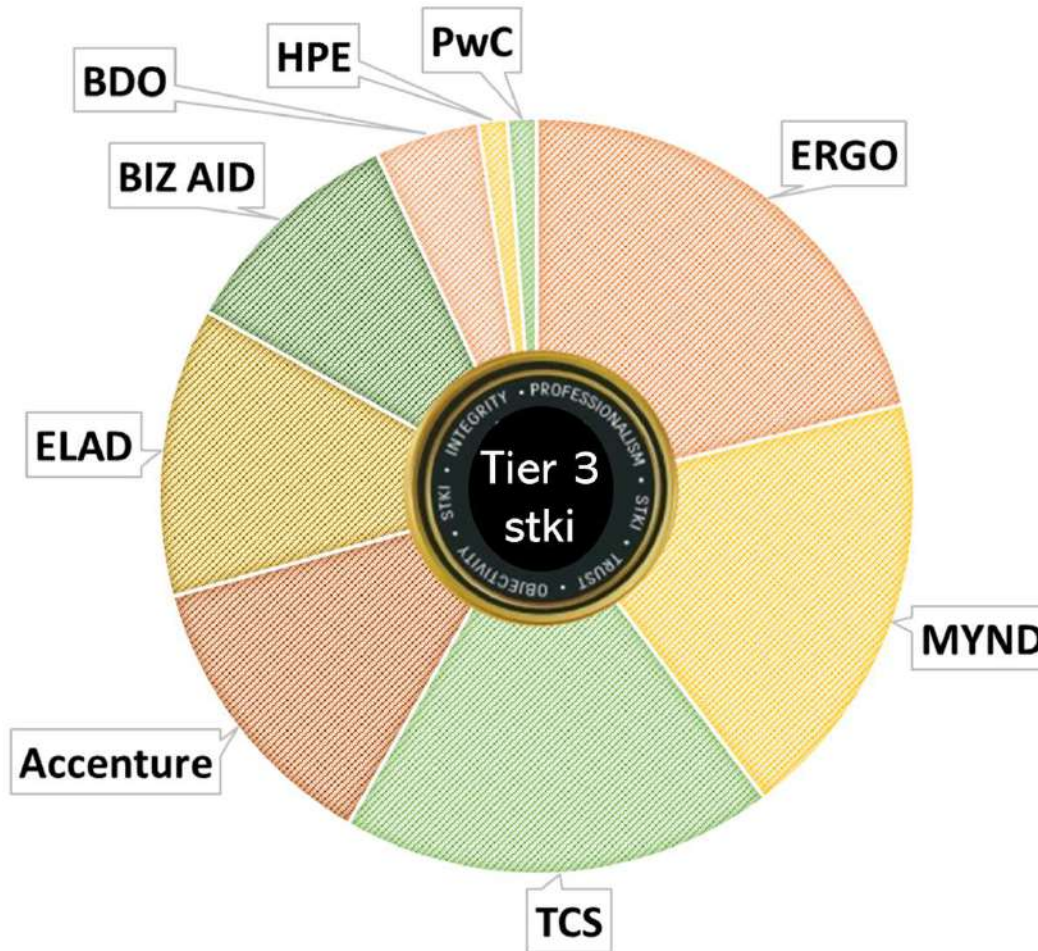
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Automation tools (RPA, OCR) Implementations



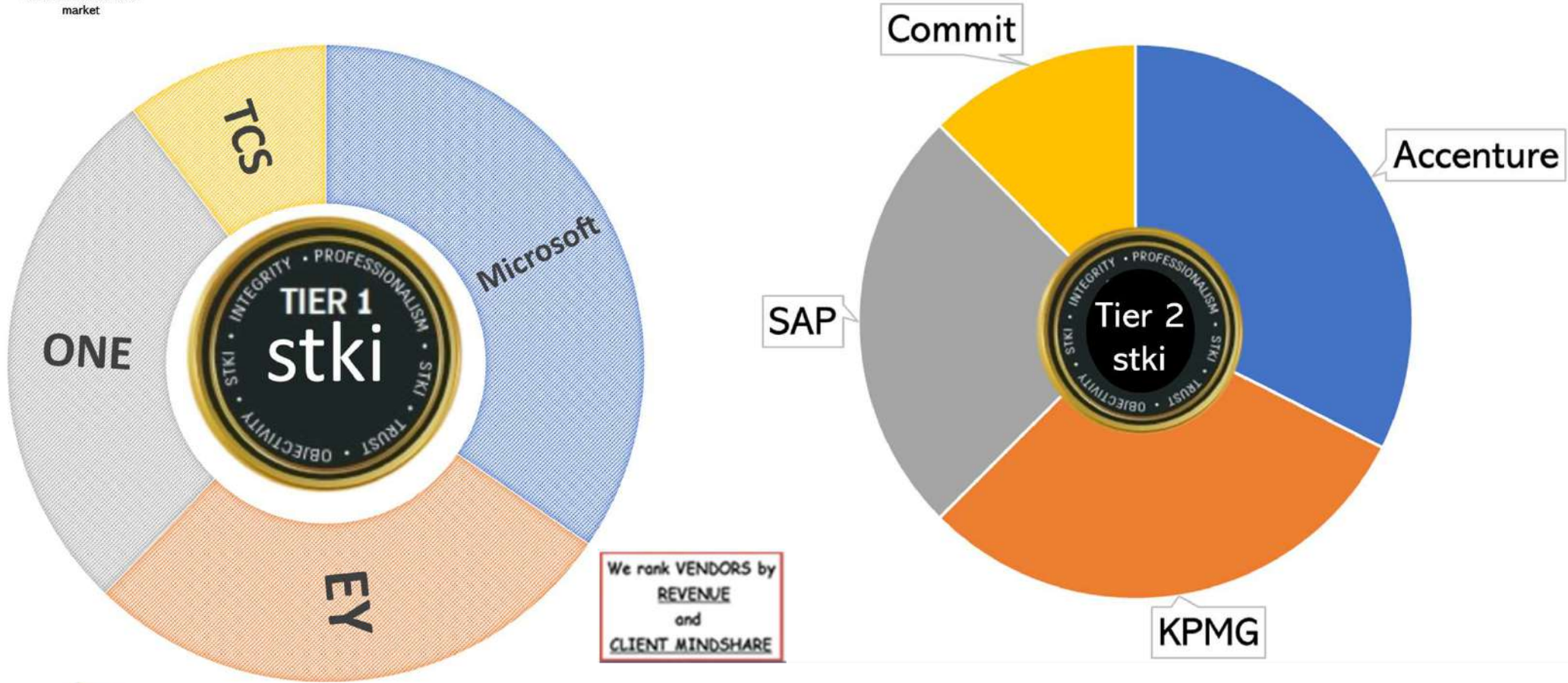
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Blockchain Projects

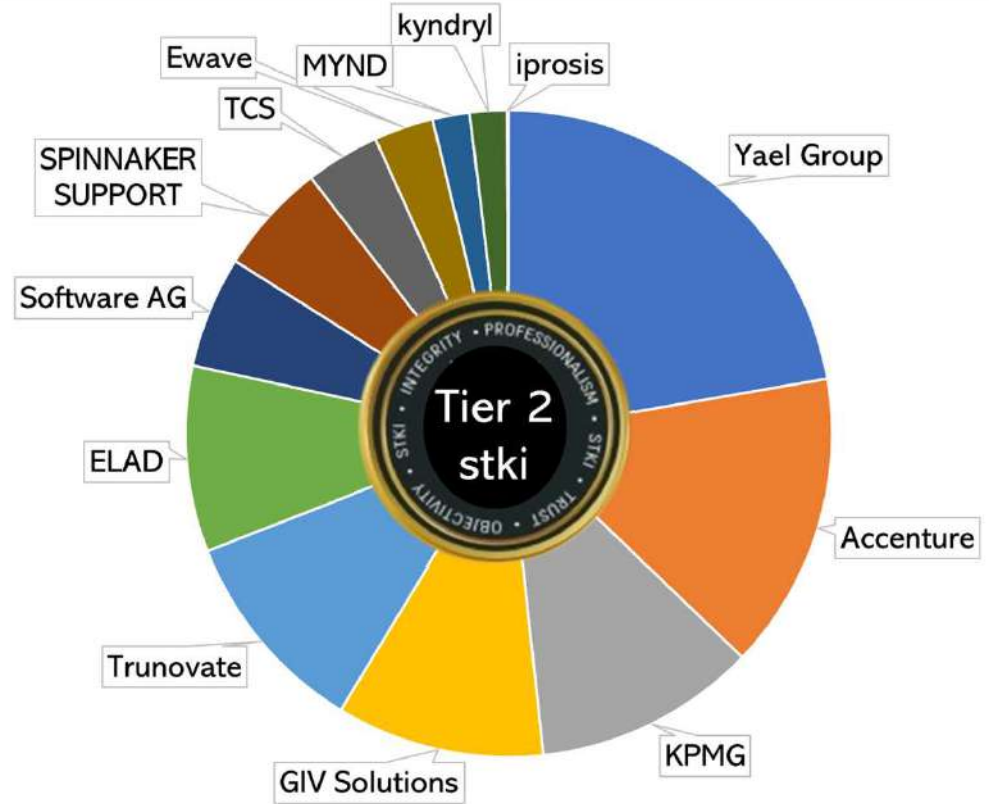
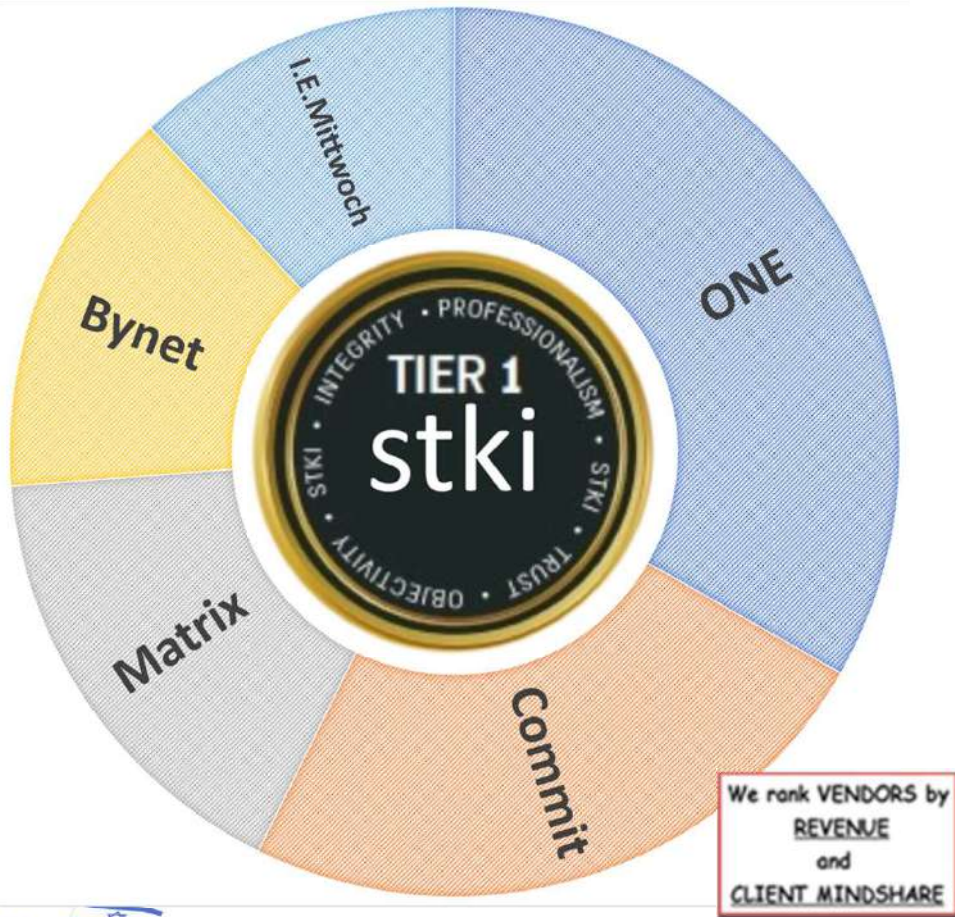


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IoT Projects





Testing, Training, Fruition & Implementation (הטמעה) Projects Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Professional Education, Coaching & Mentoring	65	2.31%	67	-15.79%	56	-10.71%	50	-4.00%	48	-16.67%	40	-7.50%	37	13.51%	42	16.67%	49
SW Testing & QA	100	5.00%	105	4.76%	110	4.55%	115	2.61%	118	-6.78%	110	-4.55%	105	8.57%	114	8.77%	124
Fruition & Implementation (הטמעה)	82	2.44%	84	-10.71%	75	6.67%	80	5.00%	84	-7.14%	78	-3.85%	75	9.33%	82	12.20%	92
TOTALS	247	3.44%	256	-5.68%	241	1.66%	245	2.04%	250	-8.80%	228	-4.82%	217	9.68%	238	11.34%	265

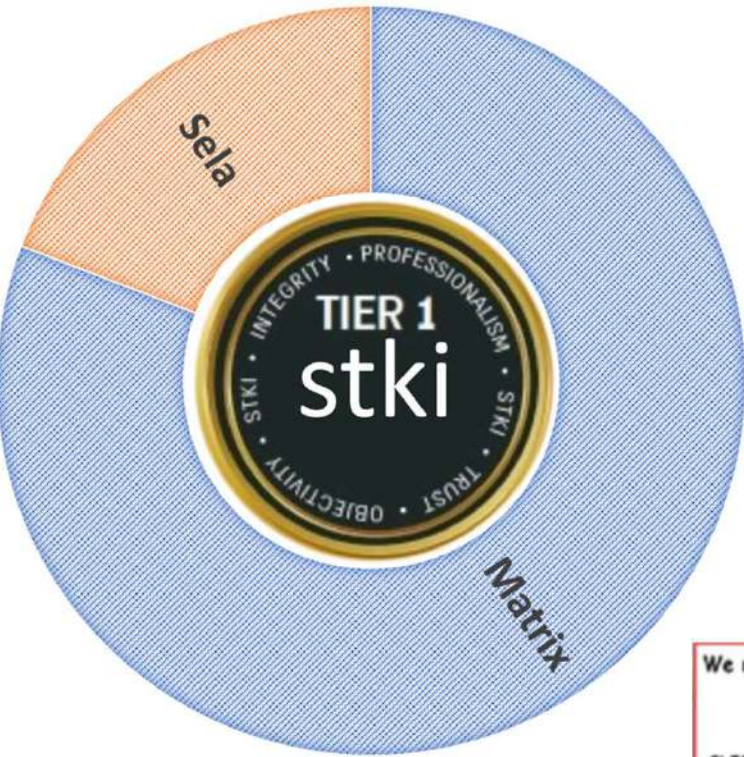
Values in Million USD



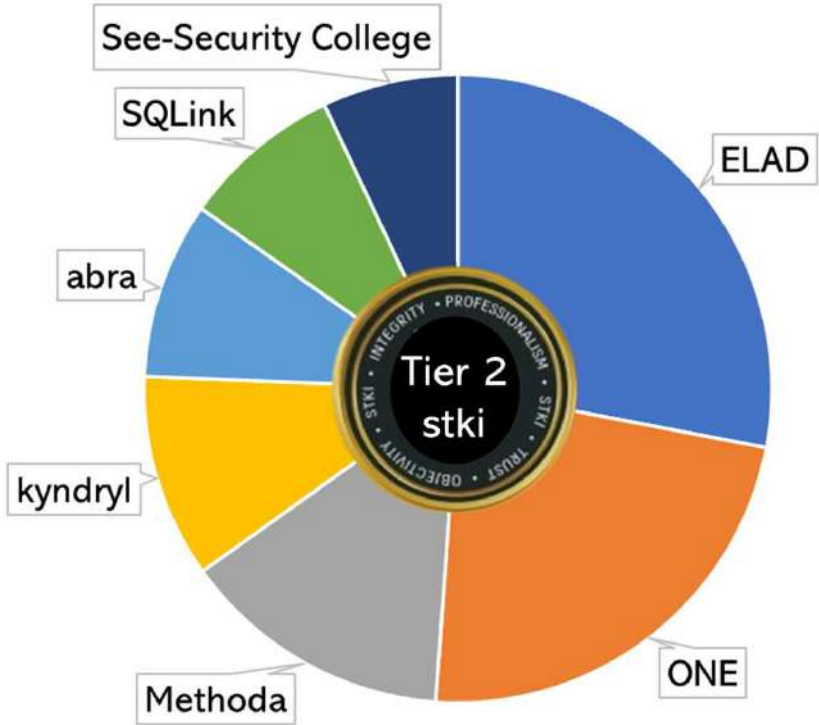
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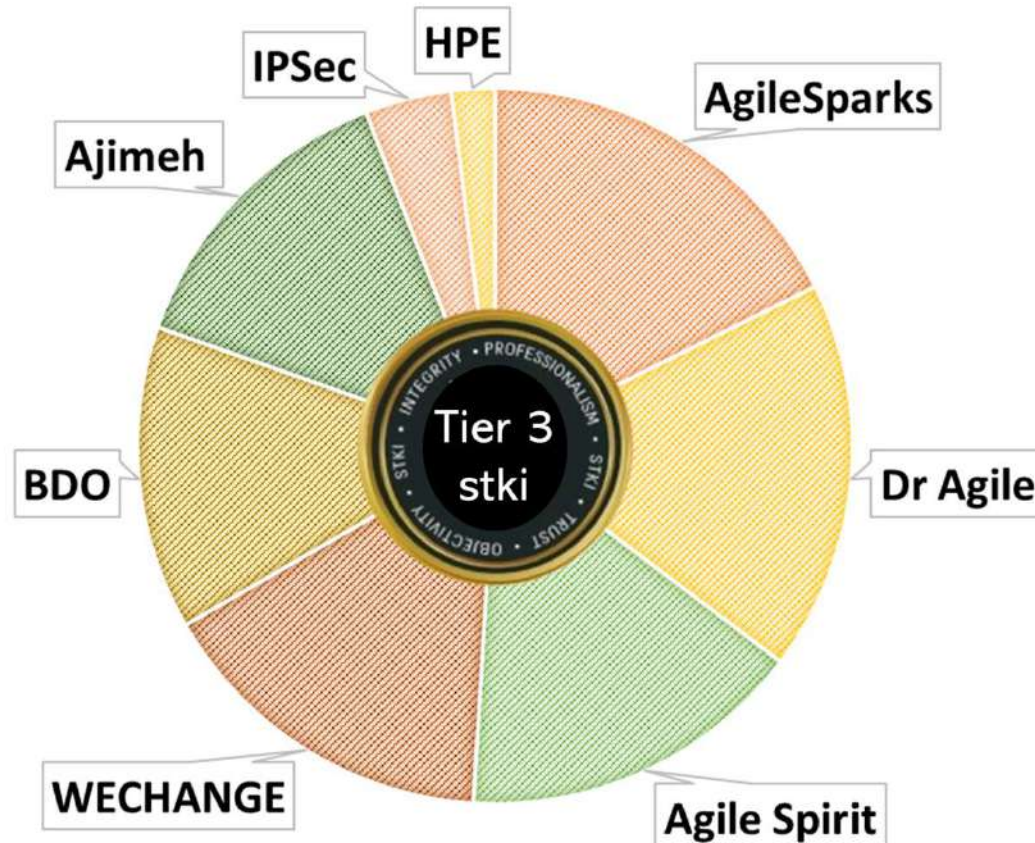
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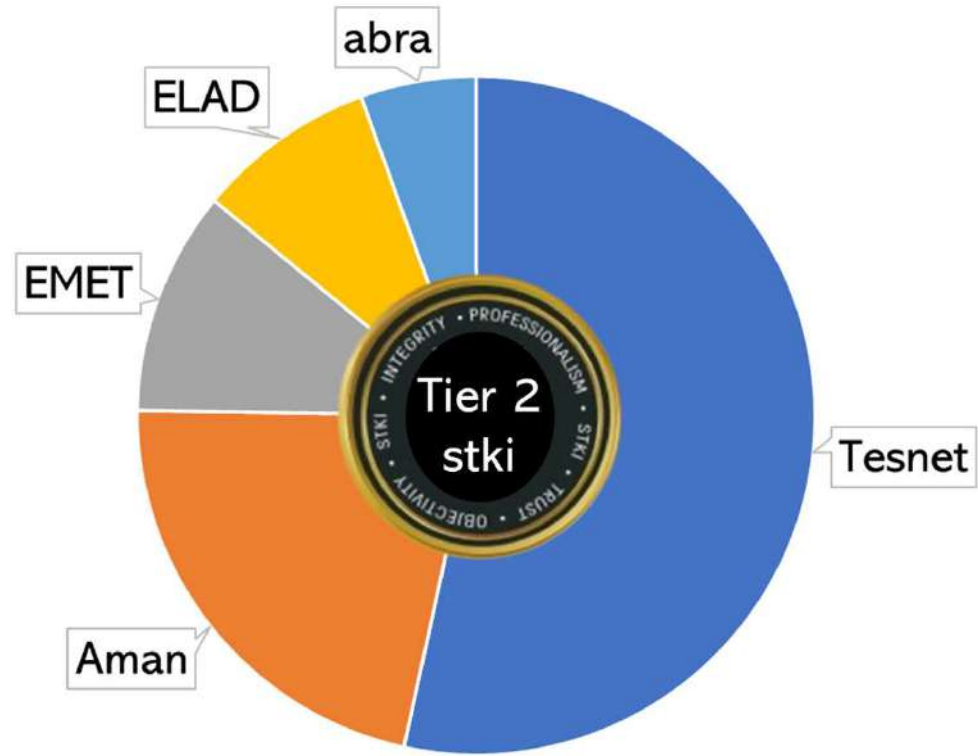
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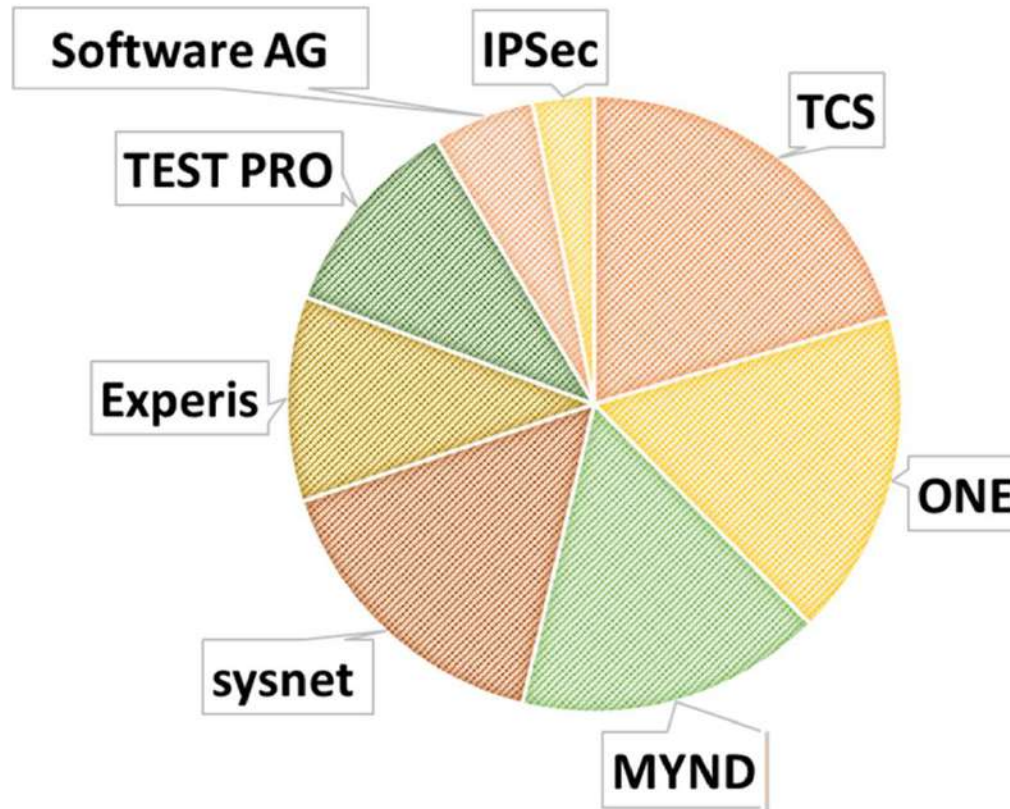
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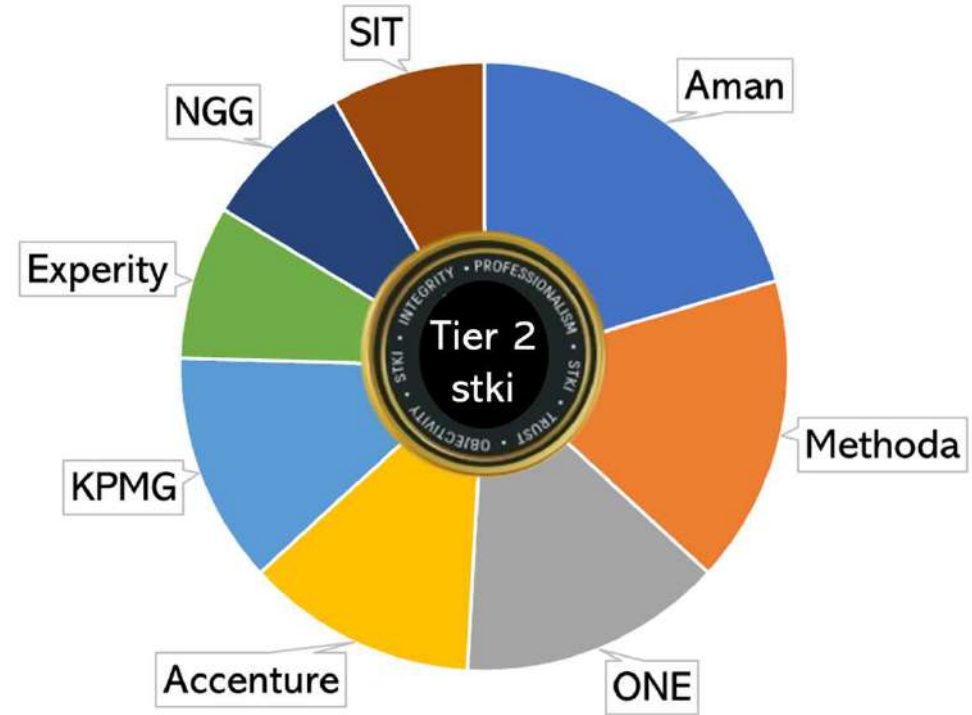
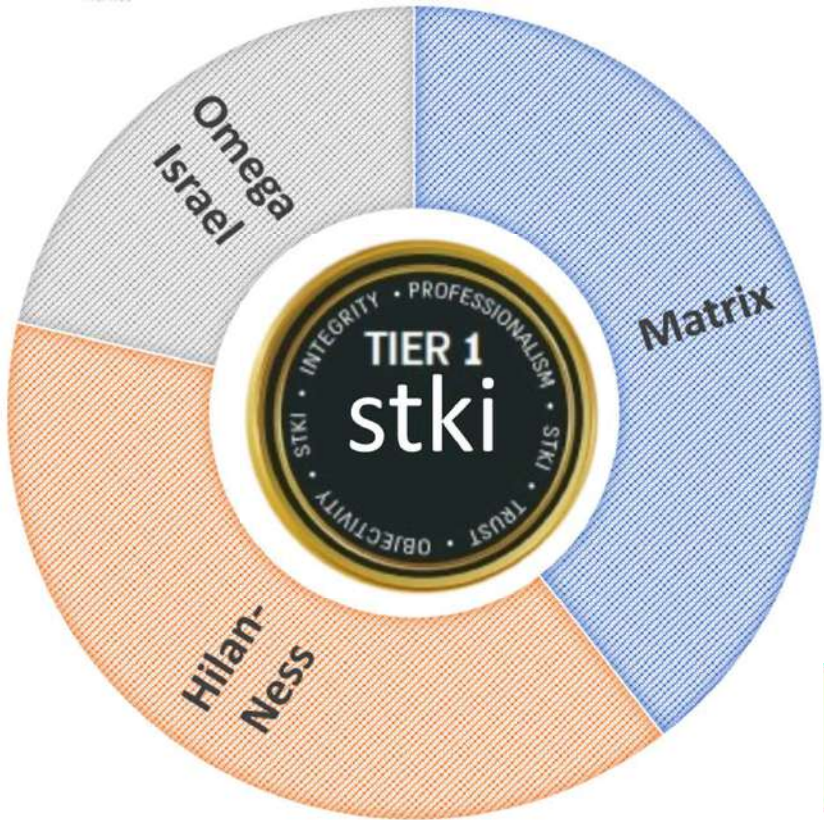
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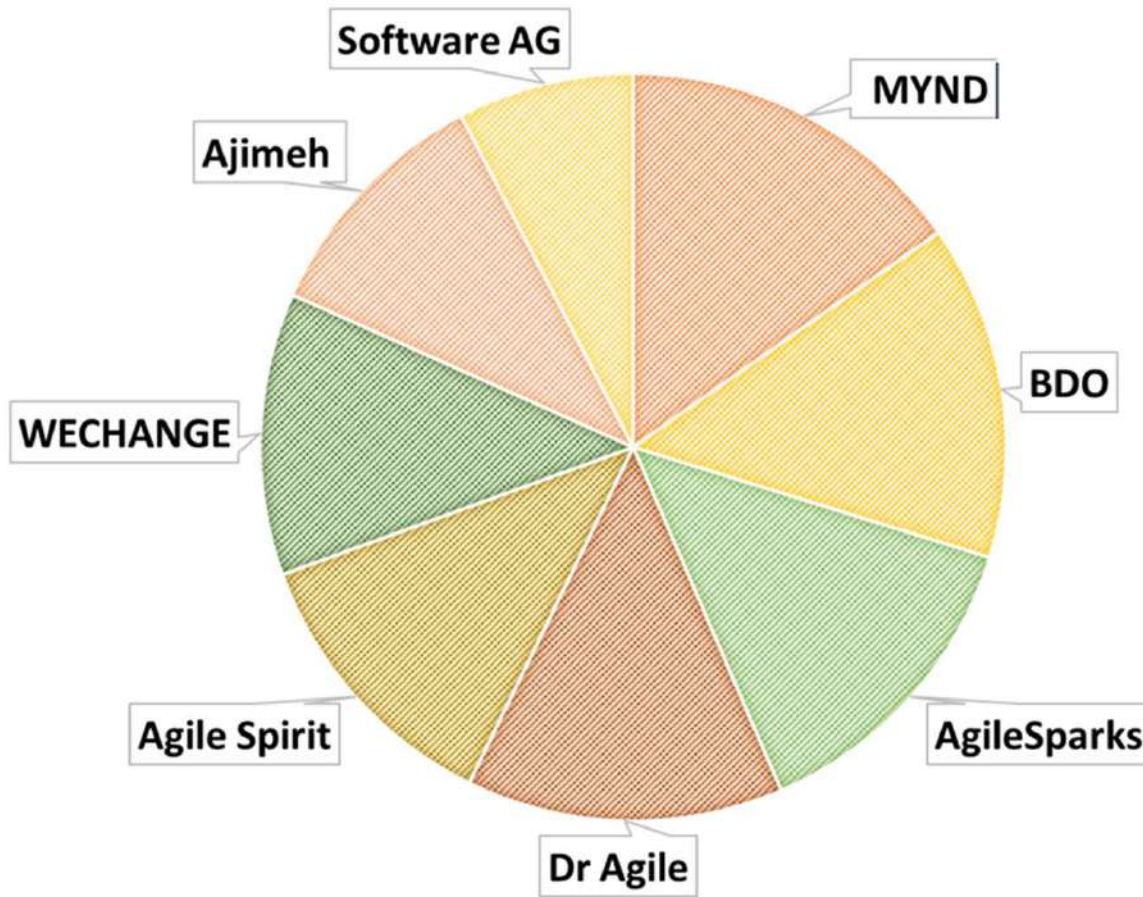
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EGRC & Regulation Projects & Implementations Market 2018-2026

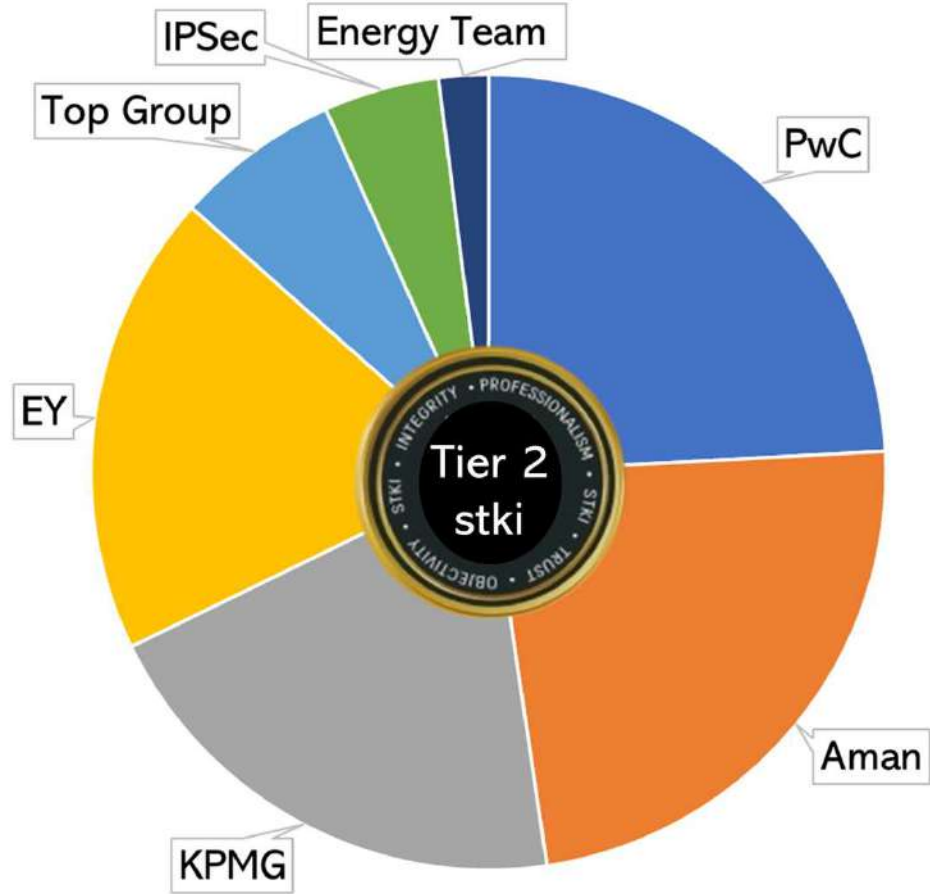
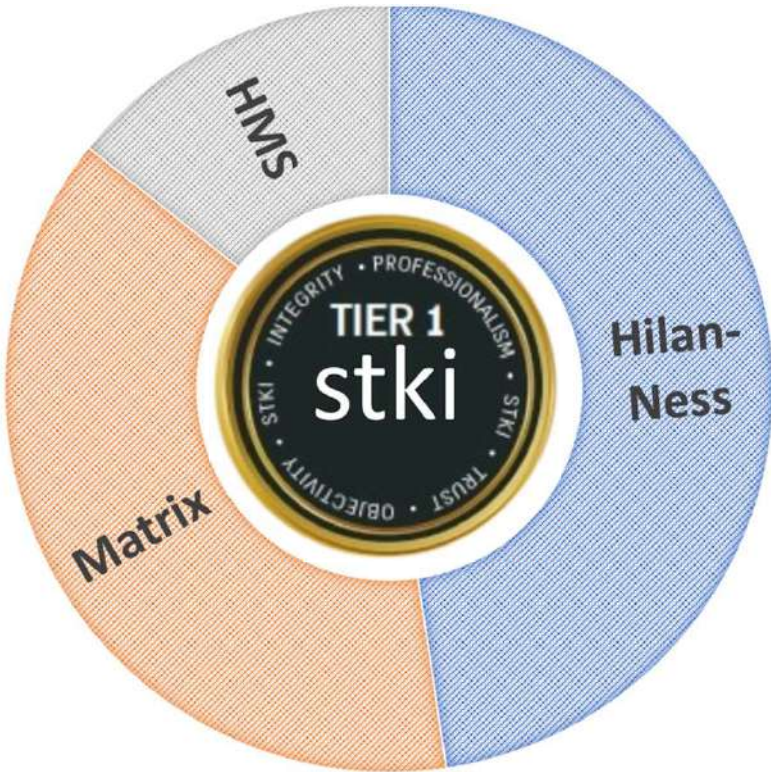
	2018		2019		2020		2021		2022		2023		2024		2025		2026
Regulation Projects	30	6.67%	32	-6.25%	30	13.33%	34	14.71%	39	-12.82%	34	-8.82%	31	12.90%	35	11.43%	39
Governance, Risk and Compliance Management	72	4.17%	75	-22.67%	58	-3.45%	56	-3.57%	54	-7.41%	50	-4.00%	48	8.33%	52	9.62%	57
TOTALS	102	4.90%	107	-17.76%	88	2.27%	90	3.33%	93	-9.68%	84	-5.95%	79	10.13%	87	10.34%	96

Values in Million USD



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Regulation Projects



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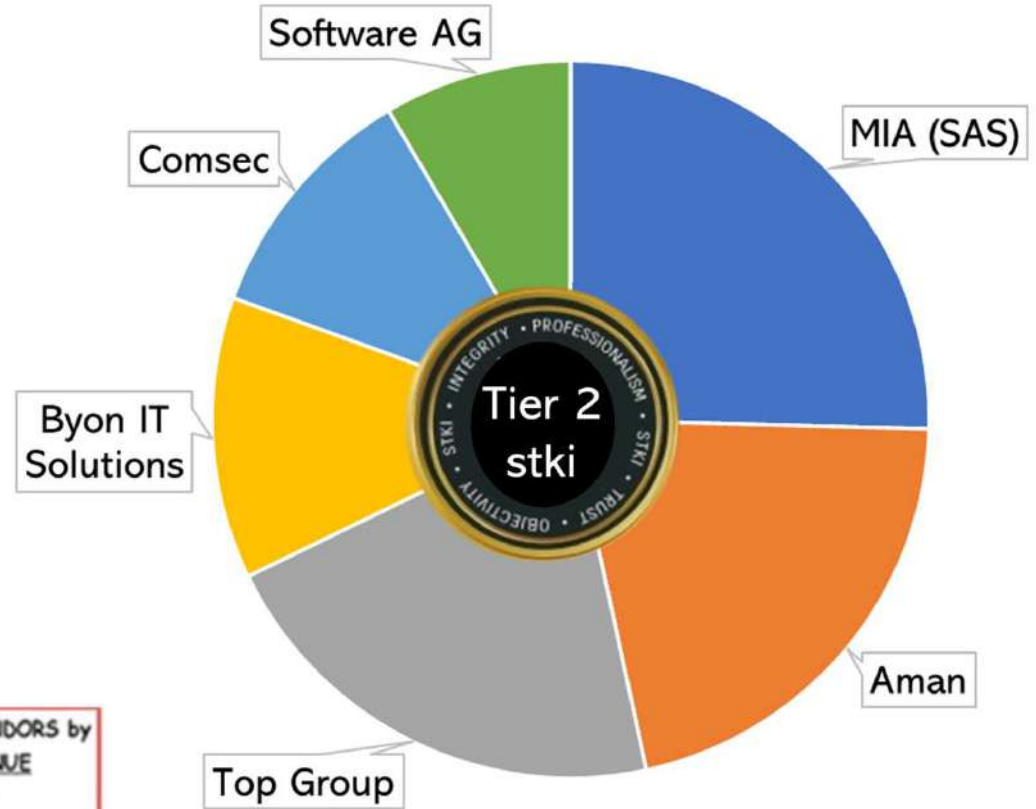


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Governance & Risk Management



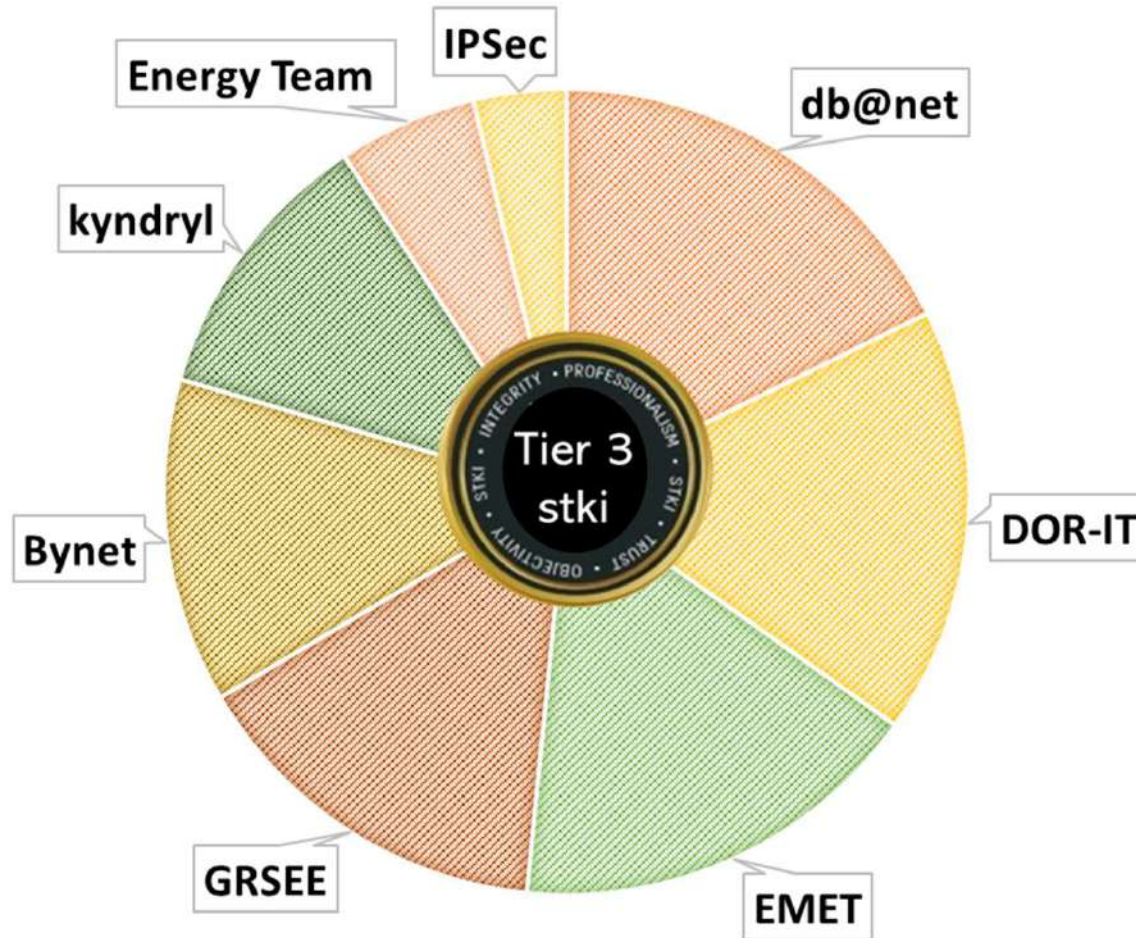
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Outsourcing & Managed Services Market 2018-2026

	2018		2019		2020		2021		2022		2023		2024		2025		2026
Complete and/or application outsourcing (Client owns the HW)	140	1.43%	142	2.11%	145	4.83%	152	11.84%	170	-1.18%	168	-1.79%	165	3.03%	170	4.71%	178
Infrastructure Outsourcing (infrastructure, storage mgmt, DBA services)	110	1.82%	112	7.14%	120	6.67%	128	1.56%	130	-1.54%	128	-2.34%	125	4.00%	130	7.69%	140
Call Centers/Help Desk Outsourcing Services	82	3.66%	85	29.41%	110	18.18%	130	3.85%	135	0.74%	136	2.21%	139	4.32%	145	10.34%	160
FINOPS Services											4	25.00%	5	30.00%	7	38.46%	9
Cyber Security Services (MDR, Threat Intelligence, etc.)	27	14.81%	31	67.74%	52	34.62%	70	7.14%	75	2.67%	77	6.49%	82	7.32%	88	7.95%	95
SIEM as a Service	3	16.67%	4	185.71%	10	50.00%	15	33.33%	20	10.00%	22	9.09%	24	16.67%	28	14.29%	32
CISO as a SERVICE											8	25.00%	10	20.00%	12	16.67%	14
Backup as a Service & DRaaS	20	35.00%	27	77.78%	48	22.92%	59	20.34%	71	19.72%	85	34.12%	114	15.79%	132	13.64%	150
Printing Outsourcing Services (pay per click)	58	12.07%	65	-46.15%	35	20.00%	42	14.29%	48	-6.25%	45	4.44%	47	10.64%	52	9.62%	57
Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)	145	10.34%	160	15.63%	185	12.43%	208	5.77%	220	5.45%	232	6.90%	248	10.89%	275	5.45%	290
Near shore	115	17.39%	135	-25.93%	100	50.00%	150	16.67%	175	-14.29%	150	-6.67%	140	3.57%	145	10.34%	160
Off shore	45	33.33%	60	-8.33%	55	54.55%	85	5.88%	90	-16.67%	75	-13.33%	65	10.77%	72	16.67%	84
Staff Augmentation (gulgalot)	200	-7.50%	185	-18.92%	150	20.00%	180	5.56%	190	-5.26%	180	3.89%	187	4.28%	195	7.69%	210
TOTALS	945	6.40%	1006	0.45%	1010	20.69%	1219	8.61%	1324	-1.06%	1310	3.13%	1351	7.36%	1451	8.86%	1579

Values in Million USD



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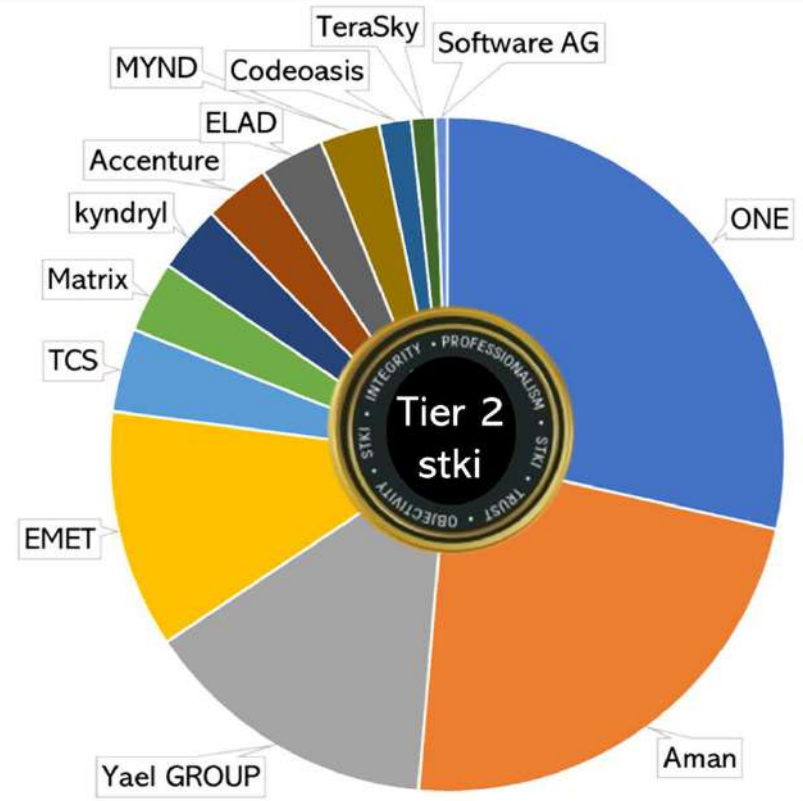
Complete and/or Application Outsourcing (client owns the HW)



value added services market

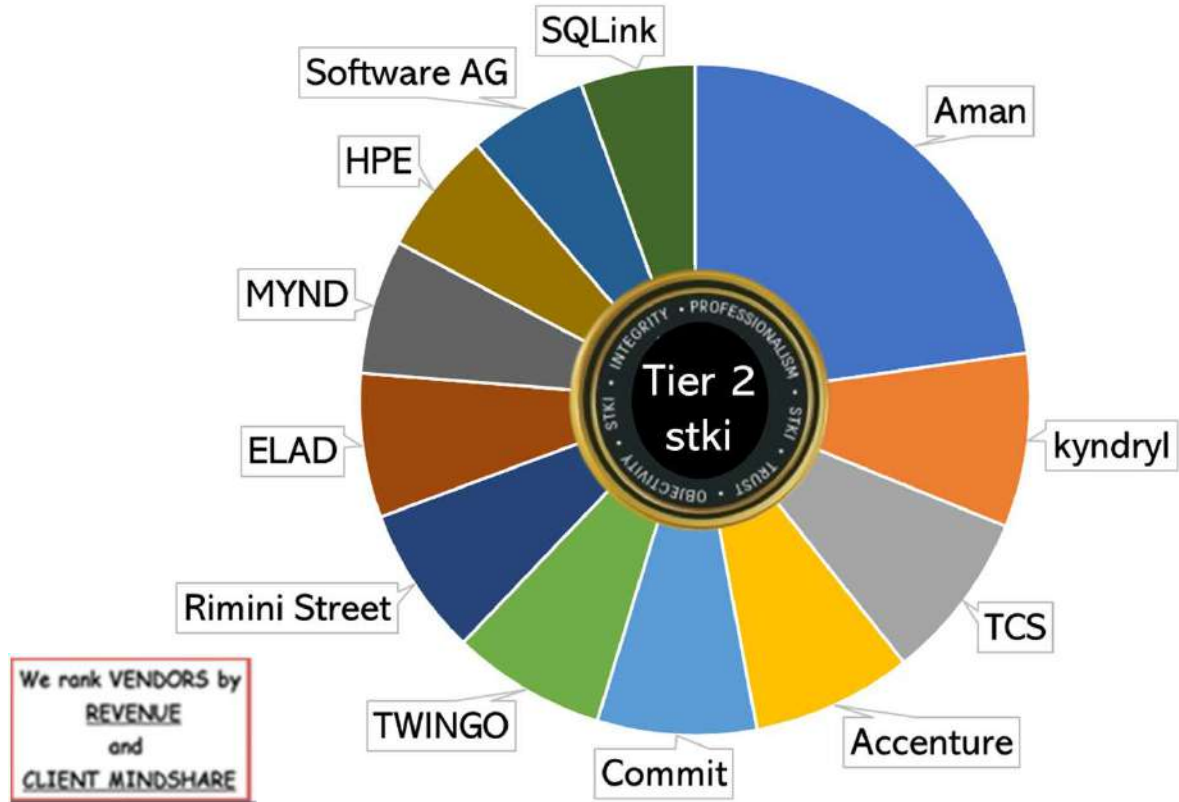
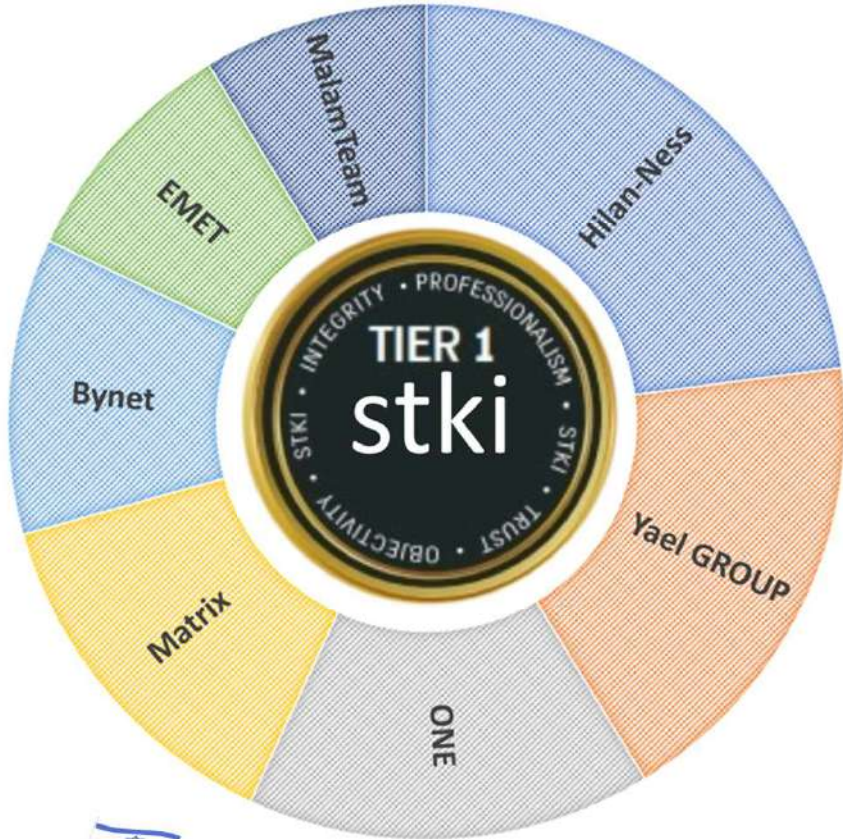


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Infrastructure Outsourcing (infrastructure, Storage mngt, DBA services)



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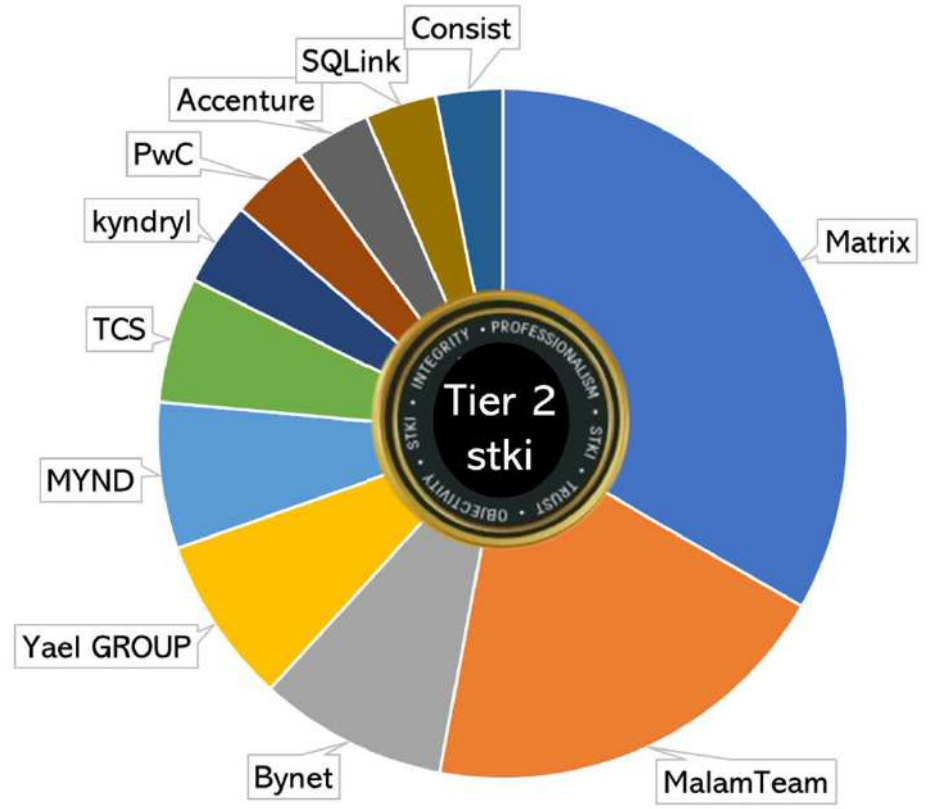
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Call Centers/Help Desk Outsourcing Services

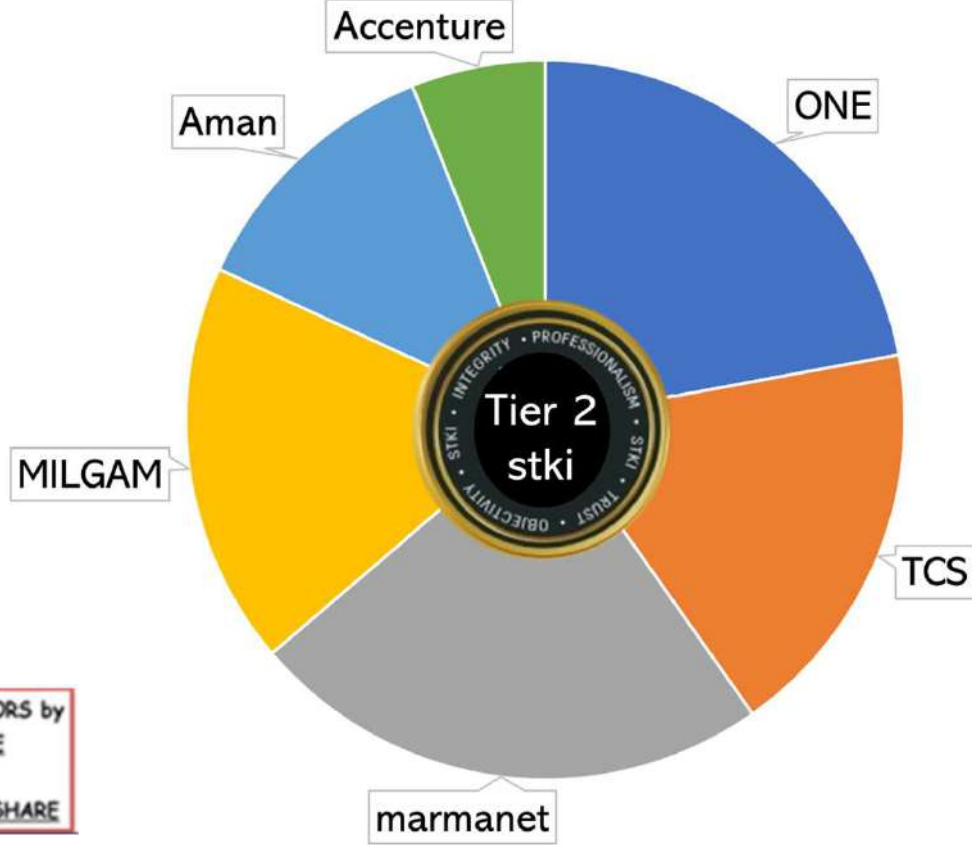


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Business Services as a Service BSaaS (Salaries, Payments, BPO, etc.)



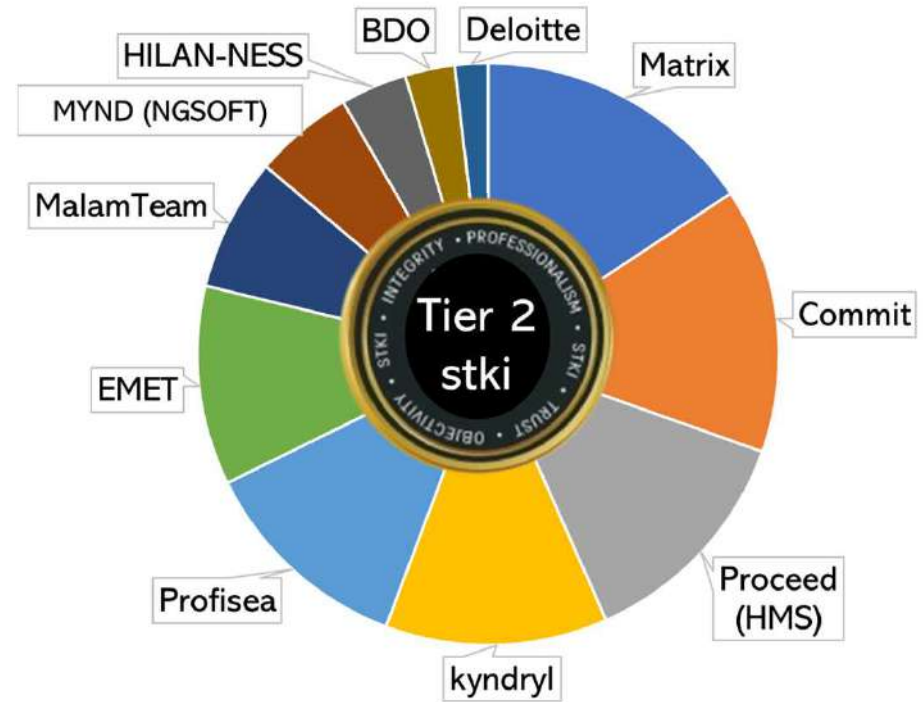
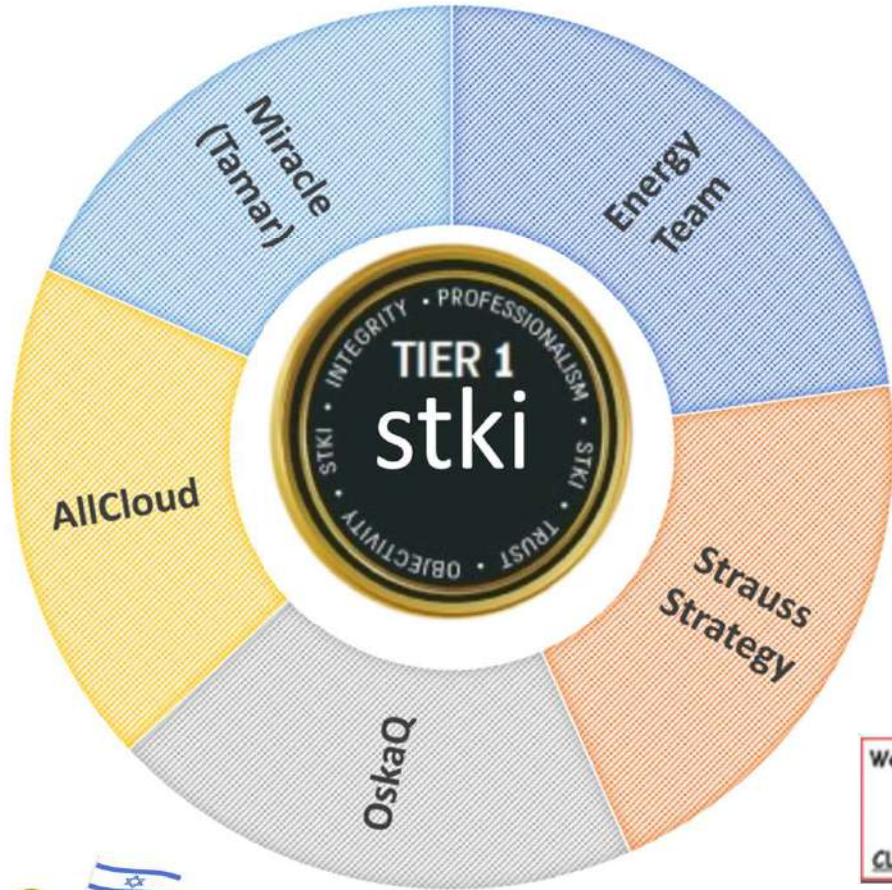
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FINOPS dedicated Services



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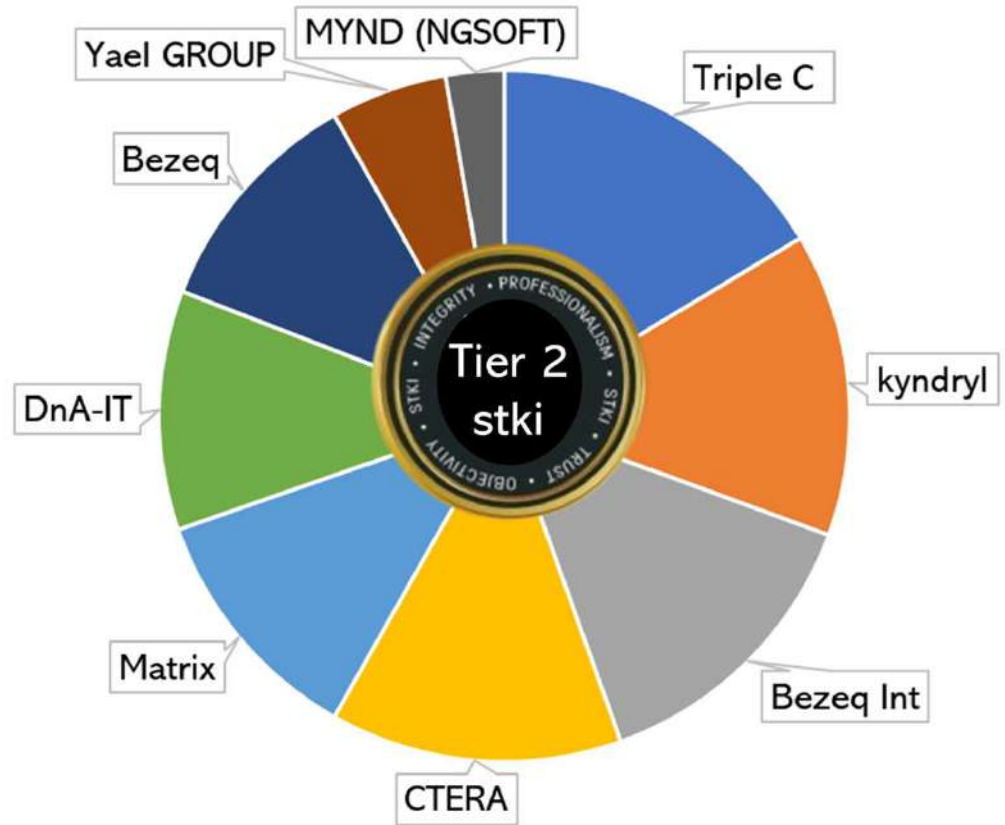
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DRaaS



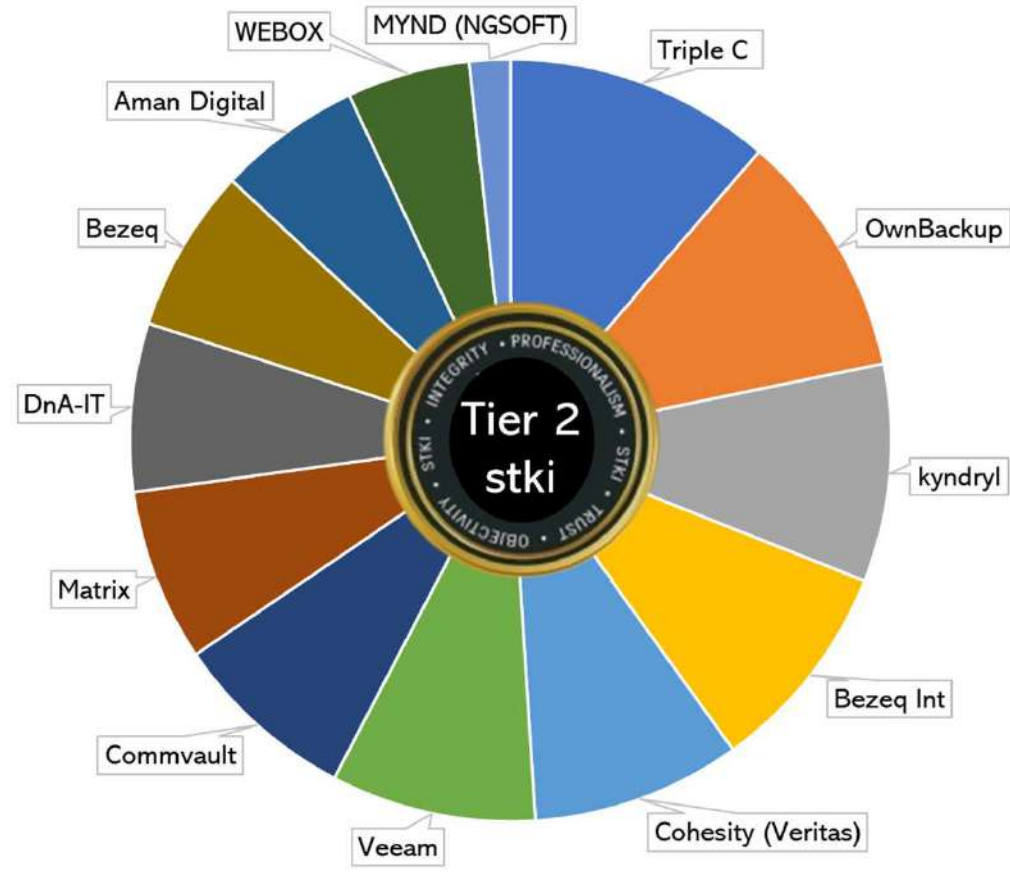
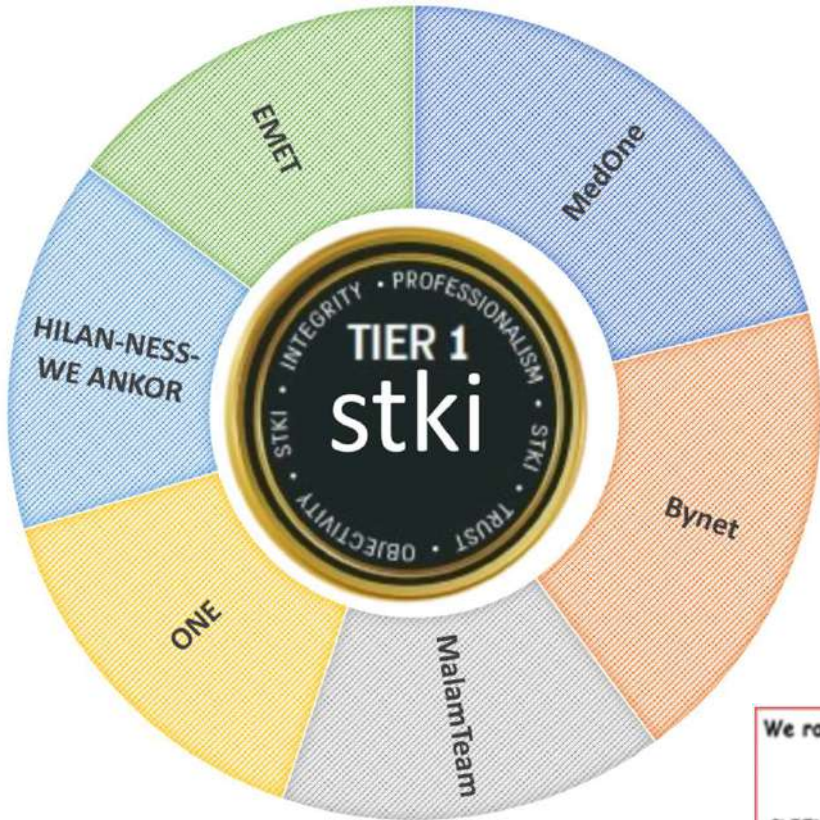
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Backup As A Service



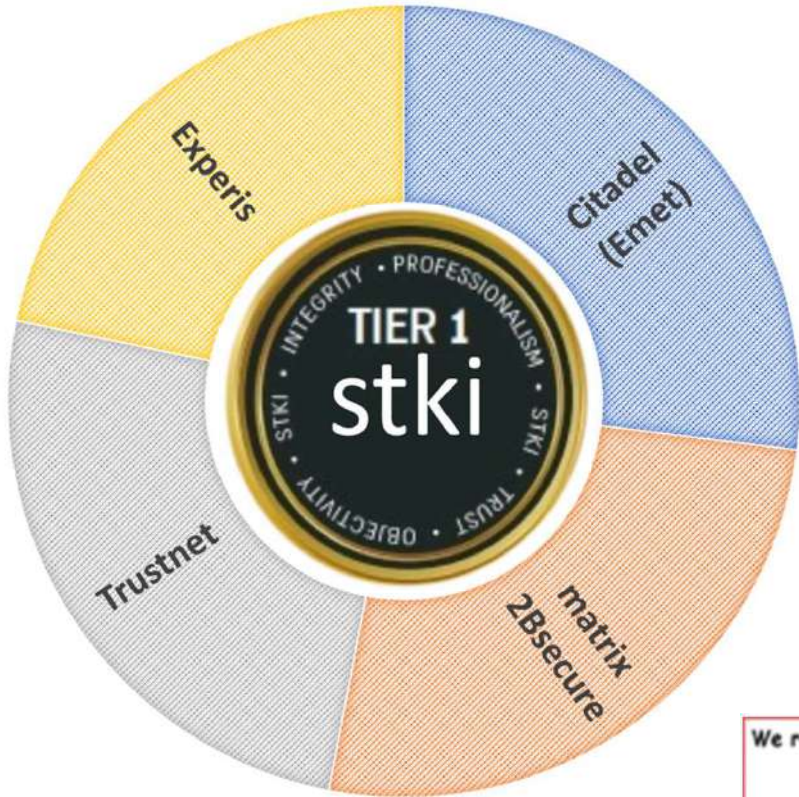
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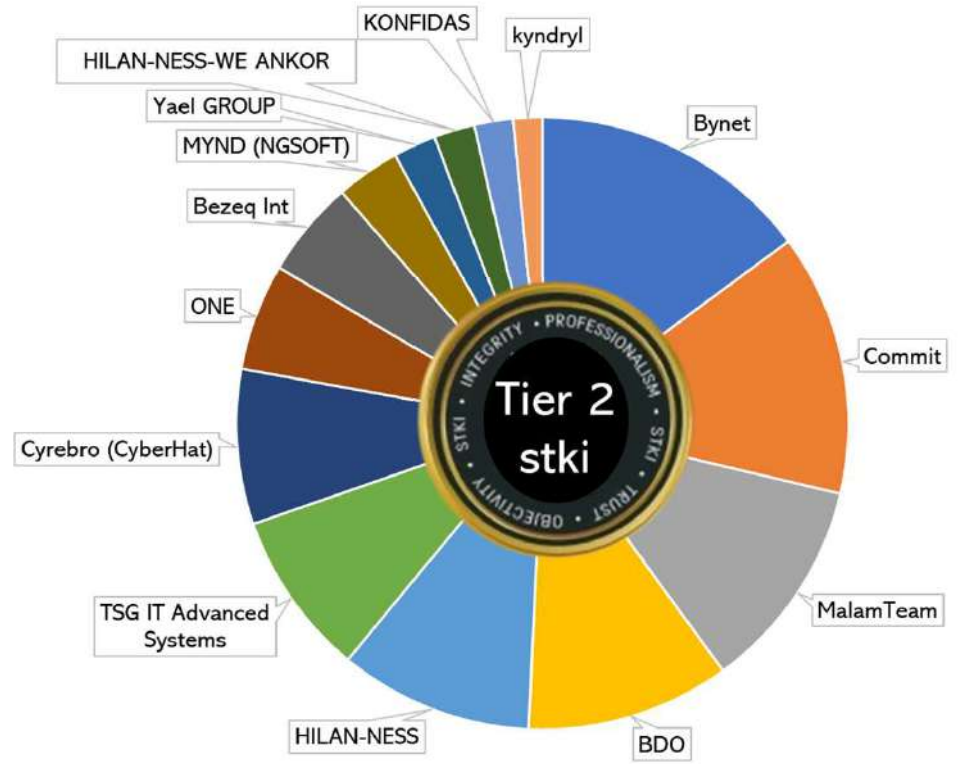
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SIEM as a Service



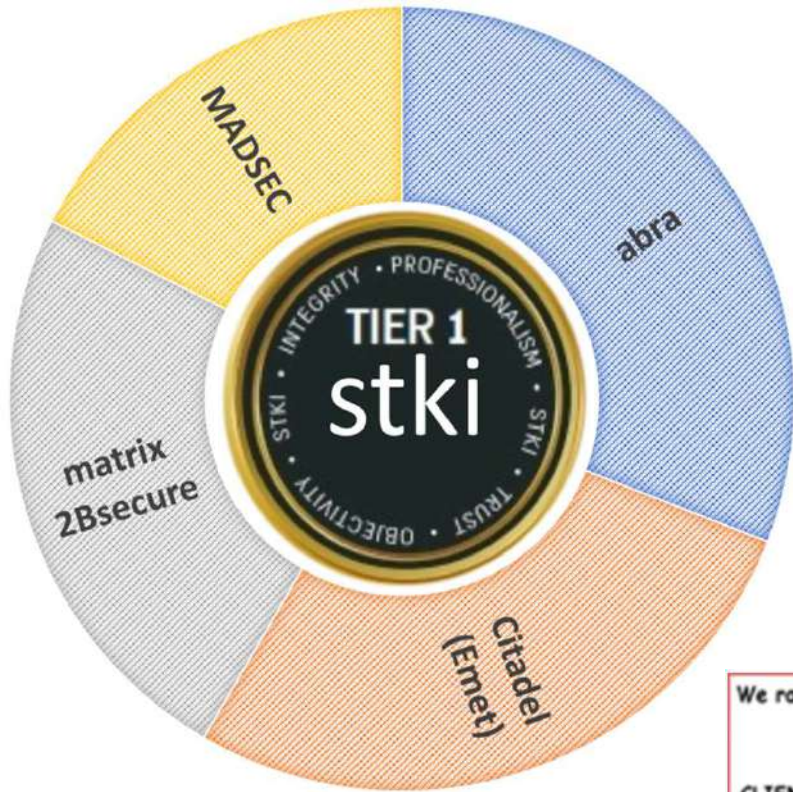
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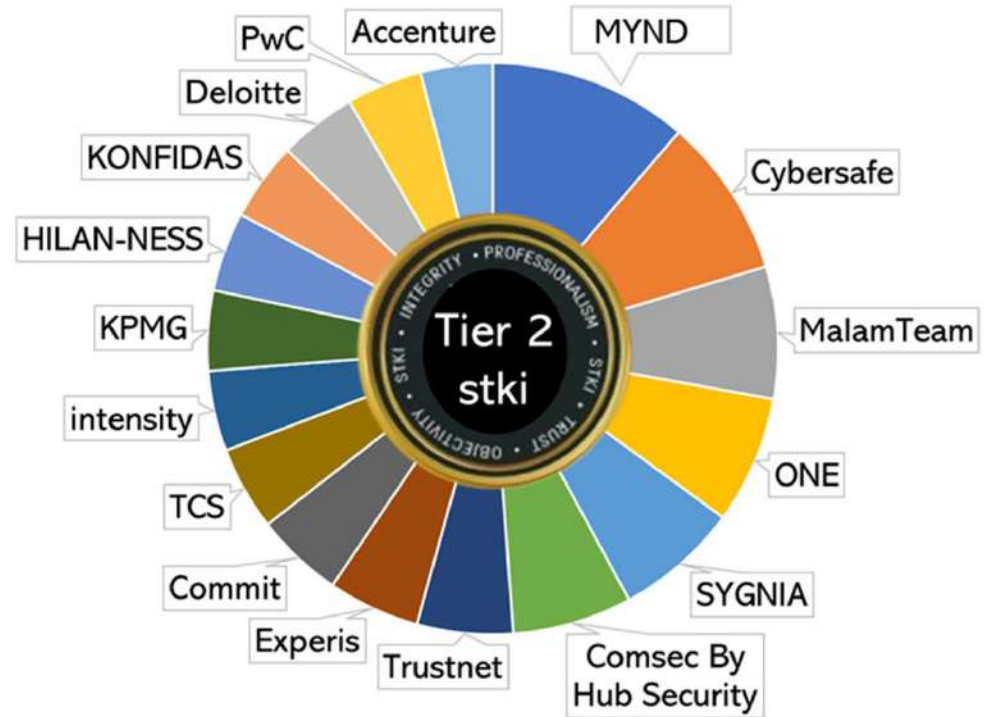
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CISO as a SERVICE



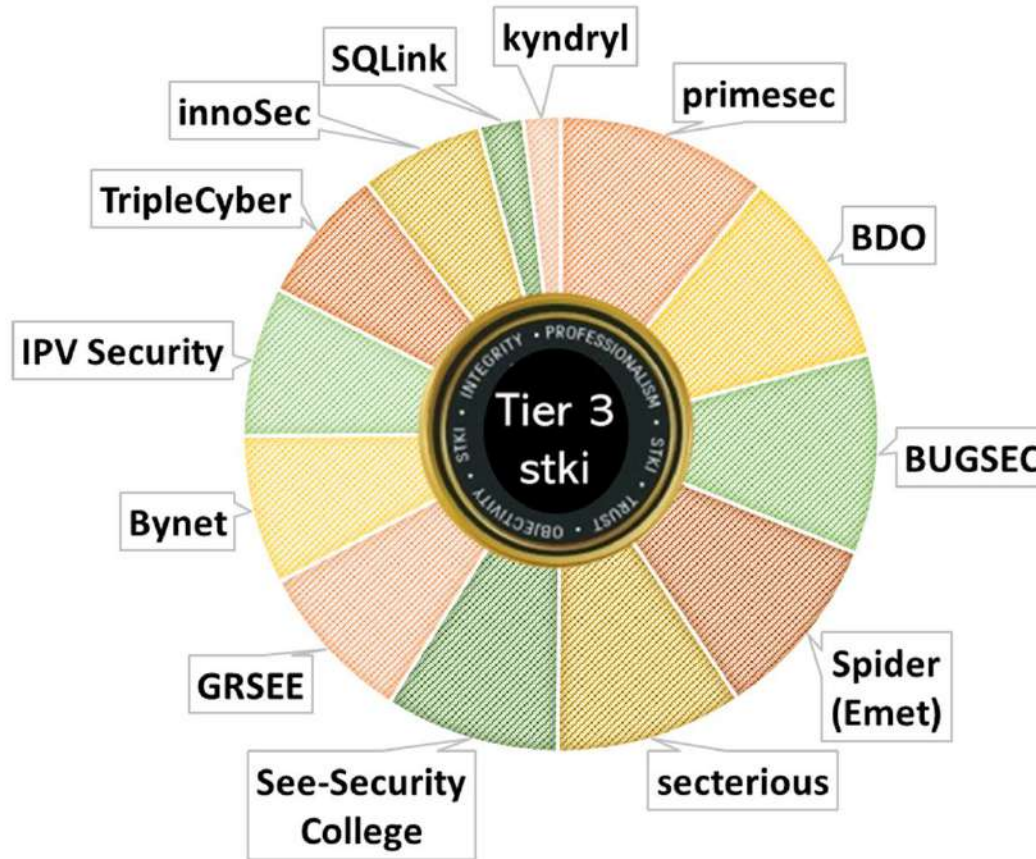
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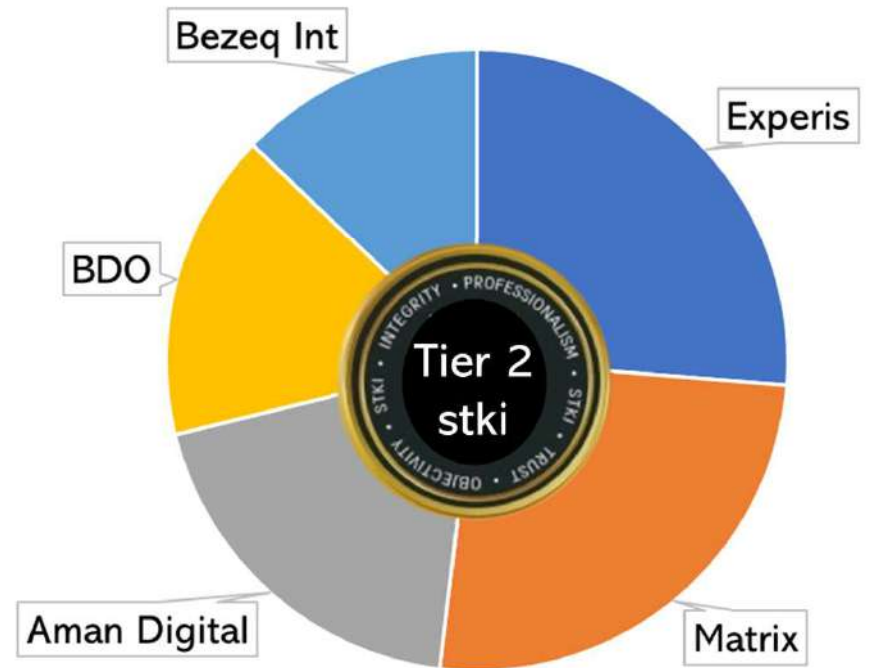
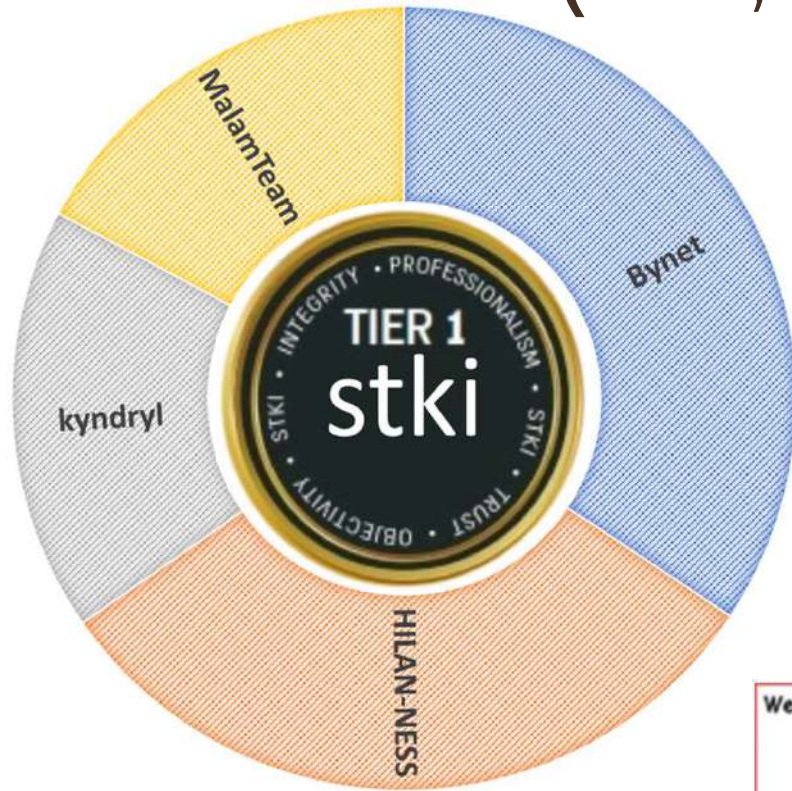
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Other Cyber Security Services (MDR, Threat Intelligence, etc.)



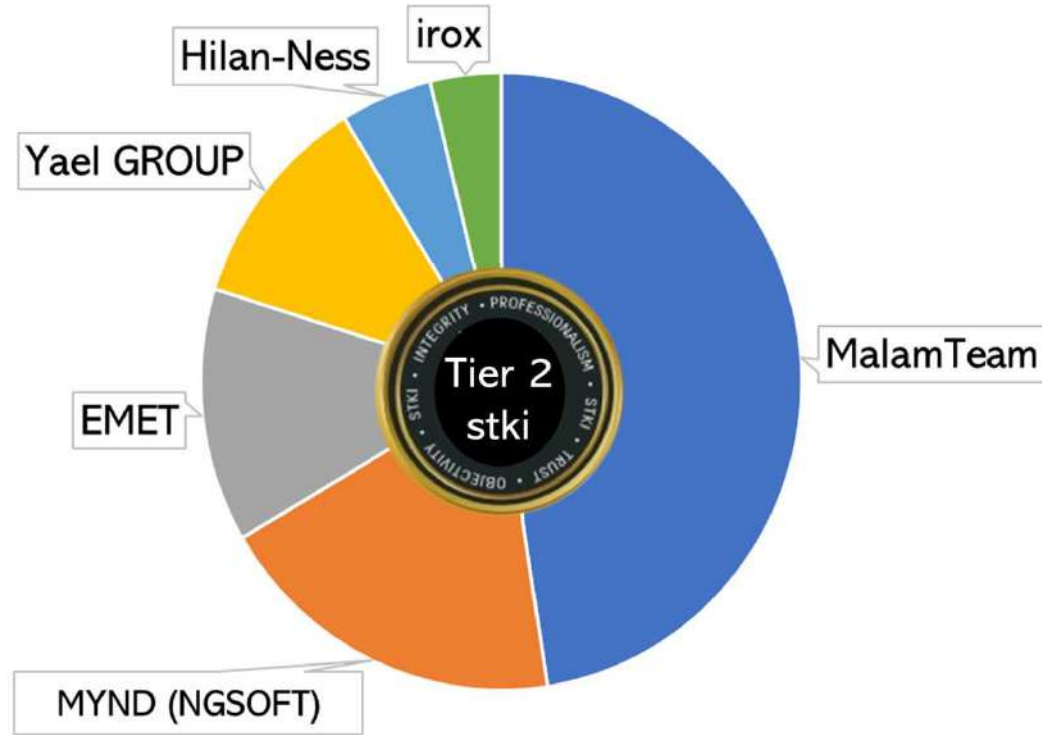
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Nearshore



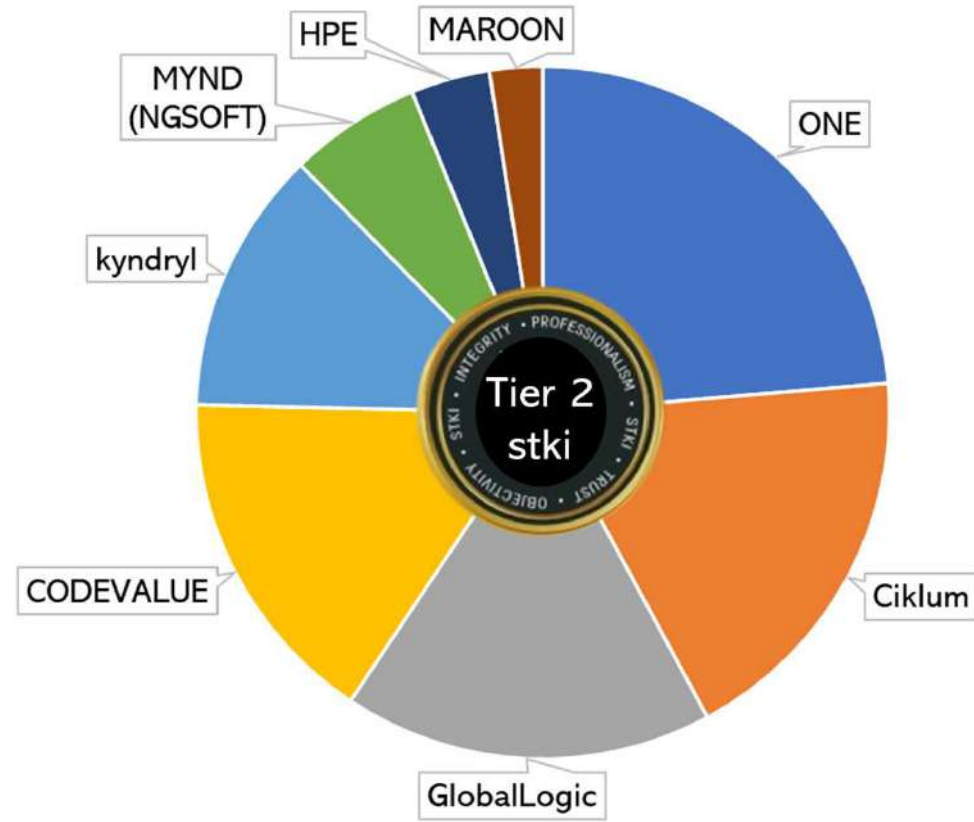
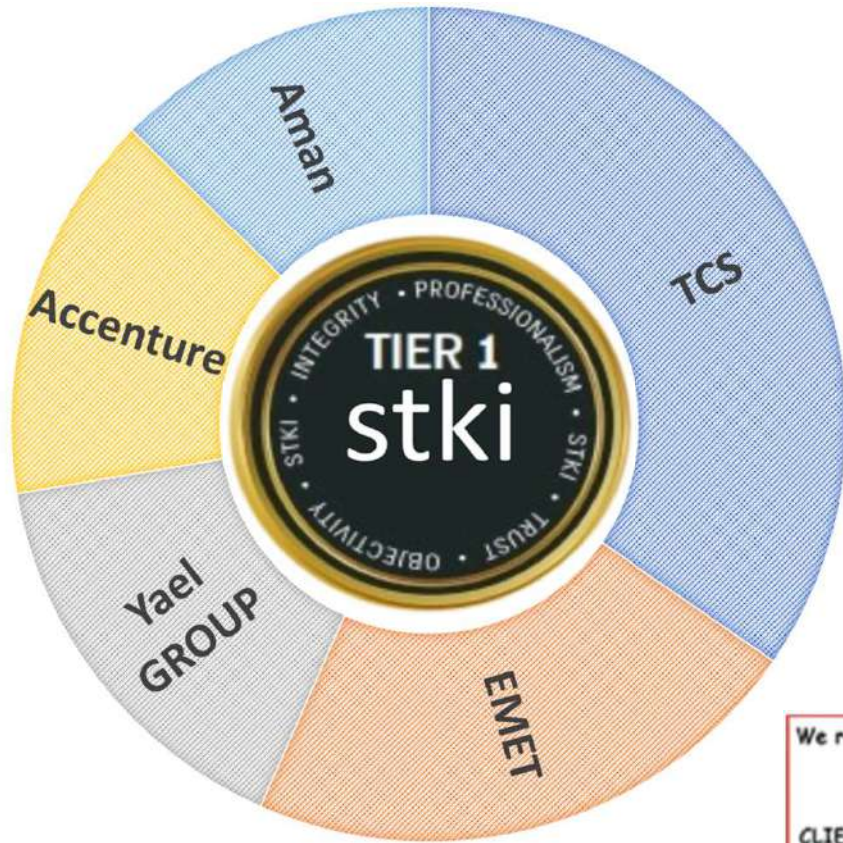
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Offshore



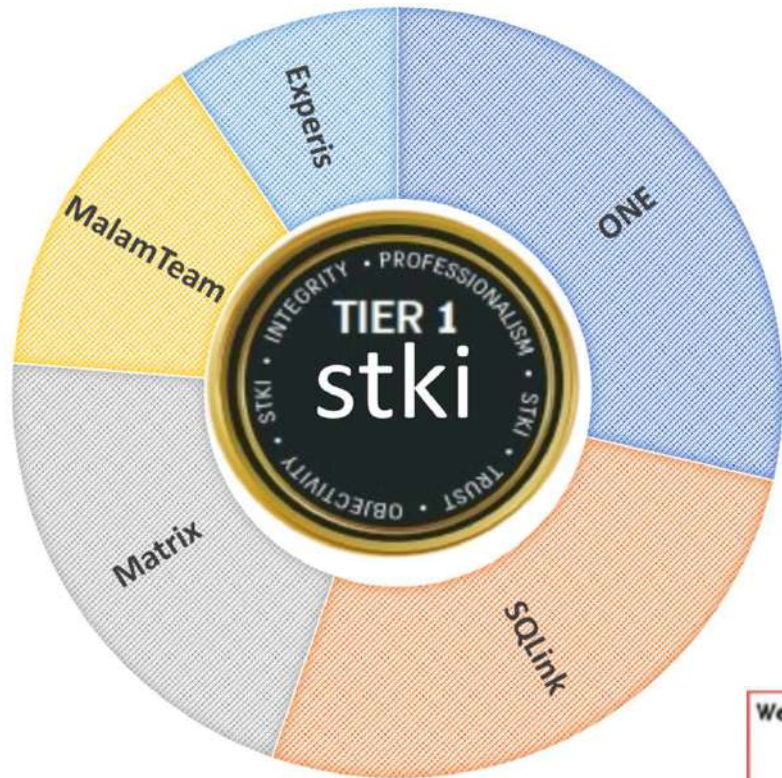
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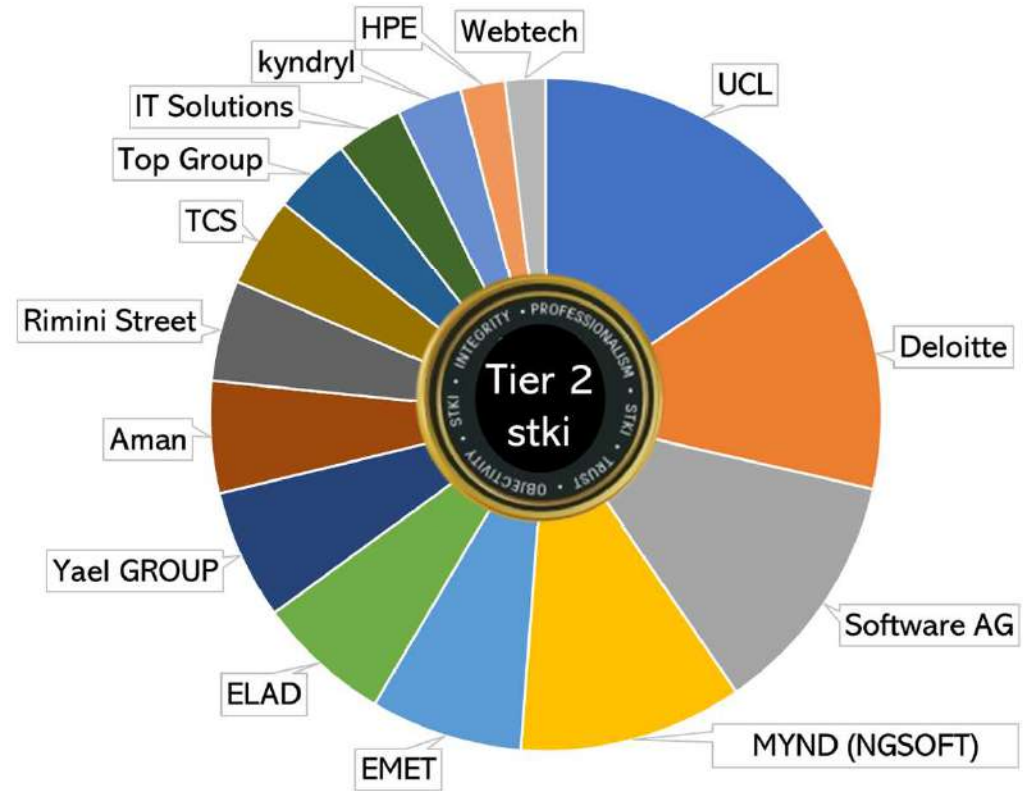
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Sourcing (Staff Augmentation) (גולגולת)








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