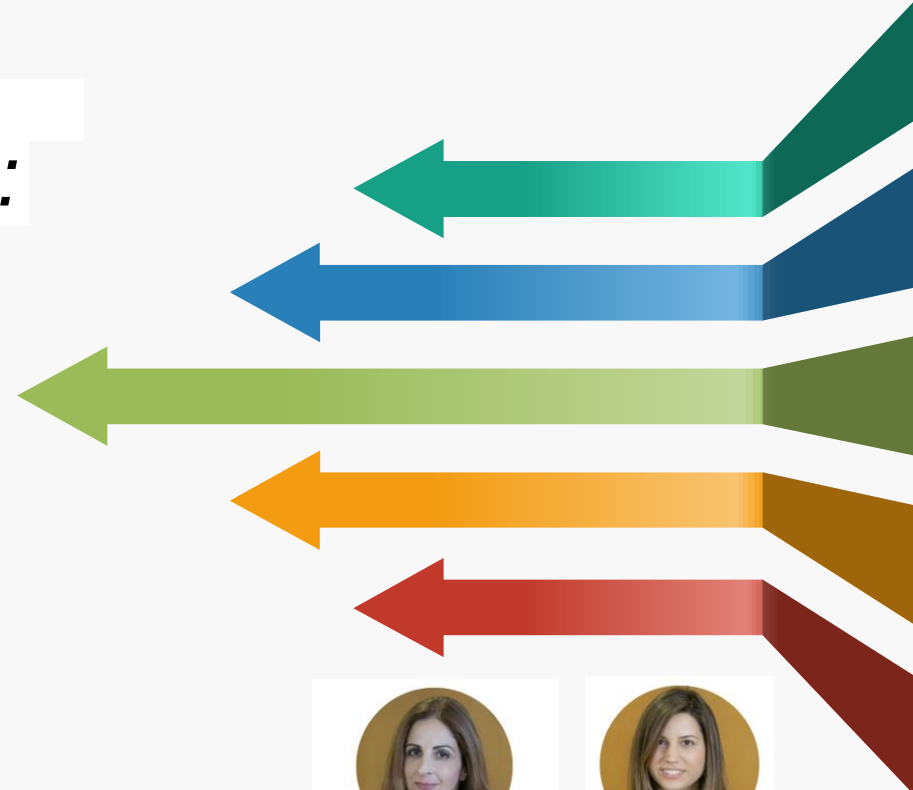


Applications & analytics:

Products & Positioning 2016



Einat Shimoni



Liat Tsafir

Methodology

Israeli product positioning

Not a technological positioning, refers only to Israeli market focused on the enterprise sector (not SMB)



- ▲ **X axis (Market Presence)**: Market penetration (installed base+ + new sales in the past year + clients perspective and perception)
- ▲ **Y axis (Local Support)**: Support, number and quality of SIs, localization, local R&D center etc.
- ▲ **Vendors to watch**: New players - just entered the Israeli market

STKI positioning represents the current Israeli market and not necessarily what we recommend to our clients



Global leader

Marketing platforms – Part 1

Package	Description	Rep. in Israel
Microsoft MDM (Marketing Pilot)	Marketing platform	Microsoft Israel, Integration Partners – Elad and Prodware
 Oracle – (Eloqua-B2B, Responsys-B2C, BlueKai DMP)	Cloud based marketing automation: B2B and B2C, Social media and listening, customer analytics	Oracle Israel Integration partners – Exscientia, Demandgen, Gil Kochavi (business delivery)
 Salesforce Marketing Cloud (Exacttarget, Radian6, BuddyMedia)	Social marketing cloud, Listening platform, Marketing automation, social media content publishing	Salesforce, Servicewise – Reseller & integration partner, All-Cloud
 IBM Digital Marketing Optimization (Unica, Silverpop, Coremetrics, Tealeaf)	Marketing Suite, optimization, Email marketing, Digital Analytics and individual customer behavior data	IBM, Ness-pro (Silverpop), Gstat (Unica), Bee2see
 Adobe (Neolane, Omniture)	Analytics, social media listening, experience manager, media optimizer, multi-channel campaigns, targeting	Adobe Israel
 SAS	Marketing Suite, Campaigns optimization	Mia computers



Global leader



Marketing platforms – Part 2

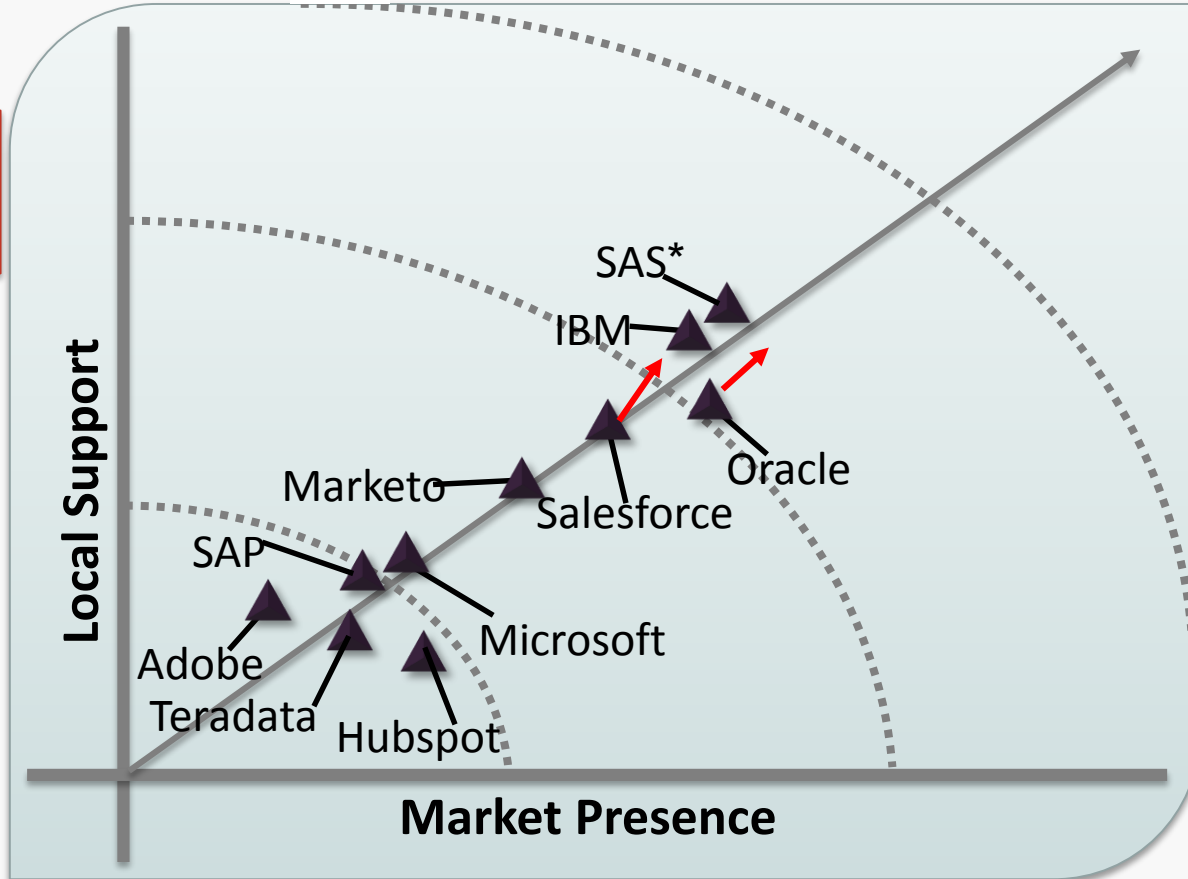
Package	Description	Rep. in Israel
Marketo	B2B Marketing platform	ServiceWise
SAP	RTOM (Real time marketing)	SAP Israel
Teradata TCRM, real time	Marketing platform	I.E. Mittwoch
Hubspot	Inbound marketing platform	

Marketing suites - 2016

Vendors to watch:

Adobe
Hubspot

*This analysis
should be used
with its
supporting
documents*



*Israel leader
In campaigns
optimization

DMP – Players in Israel

Company	Product Name	Description	Rep/Integrators
 Oracle	BlueKai	1 st , 2 nd and 3 rd Party data Integration to DSPs	Oracle
IBM	UBX (Universal Behavior Exchange)	Partnership with RocketFuel 	
Exposebox	PredictiveLoop	Premium (ecommerce) 2 nd party data	Ness-Pro
Israeli Exchange- ILX	ILX (based on Appnexus)	Israel coalition of publishers (2 nd party data) - Premium ads	
DynamicYield	DynamicYield		
Google			
Facebook			
Great Digital 49ers	FLXOne (Teradata)	DMP no 3 rd party data?	Great Digital 49ers
 Adobe	Audience Manager		



Global leader

Web Content Management tools - Part 1

Company	Product Name	Integrators
Microsoft	Sharepoint	Ewave, Matrix, Malam-Team, Elad, Bynet SW, HP, Yael, SQLink, One1, Aman, Realcommerce, Hilan (Ness) & more...
IBM	Websphere Portal	Matrix, IBM, Webtech, Novilis
Matrix Digital	Acx (Scepia)	Matrix Digital
	EPIserver	Matrix
	Telerik (Sitefinity – product)	Matrix
Realcommerce	RealCMS	Realcommerce
Ewave	eGenCMS 2.0	Ewave
Interwoven (Autonomy – HP)	Xioma	Xioma
SAP Israel	SAP Portal	IBM, One1(Xact), Ness, HP, Taldor, Malam-Team and more

Web Content Management tools - Part 2

Company	Product Name	Integrators
Oracle Israel	Oracle Web Center	Matrix, Ewave, Coral, Taldor, Advantech, Unitask, Qesem, ONE1, HP
	Oracle ATG (Self-service)	Oracle, Cognity, Ewave
 Joomla	WebTech, Ewave, Matrix	
 Drupal	Realcommerce, Ewave, Linnovate, Matrix, NG Soft, WebTech	
 Wordpress	Ewave, Hilan (Ness), Matrix, UTeam, Yael (Intigo), Coral	
 Cuyahoga (Open Source on Microsoft platform)	Aman	
 Umbraco	UTeam, Matrix, SQLink, Elipaz, One1 (Stanga)	
 Liferay	WebTech, Malam-Team, Matrix	



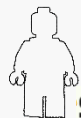
Open source

e-Commerce packages in Israel

Package		Rep in Israel
	SAP (Hybris)	SAP Israel, Integration partners: HP, Deloitte, E&Y, Accenture, Hilan (Ness)
	IBM - Websphere Commerce, Sterling	IBM Israel
	Oracle (ATG)	Oracle Israel
	ACx	Matrix
	IT Signature (PIM + eCommerce)	Ness-Pro
	Netsuite (eCommerce modile)	NetCloud, One1
	Microsoft Ecommerce (AX module)	Microsoft Israel
	 Magento (eBay)	RealCommerce, Razorgrip, Matrix, Robin, eWave, Yael, One1 (Stanga)
	 Nopcommerce	UTeam, Matrix

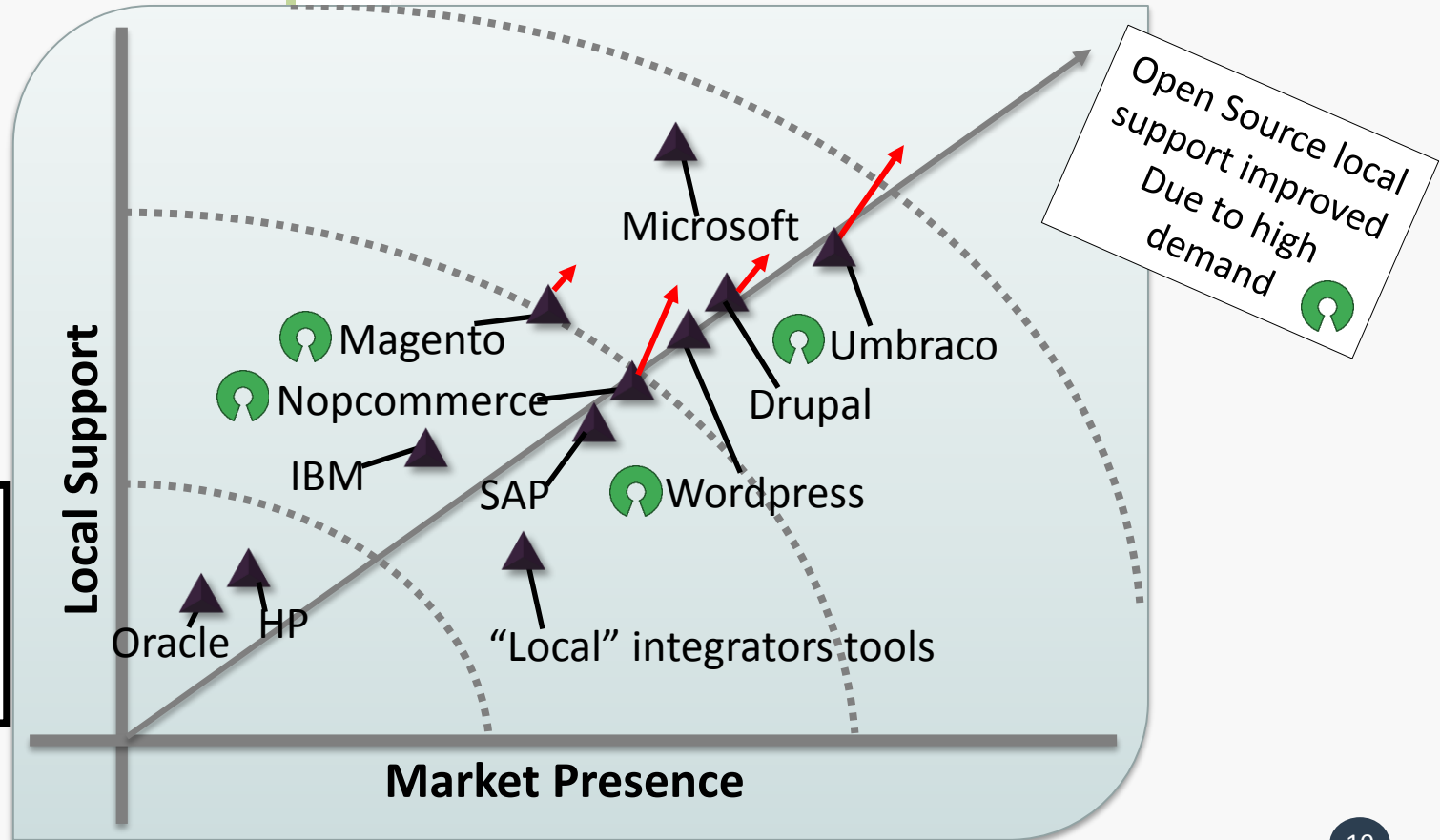


Open source



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WCM & e-Commerce- Israeli Market Positioning 2016



Digital, e-Commerce & Marketing consultants in Israel - Partial List

- ▲ Accenture
- ▲ B-Pro
- ▲ Be-Digital
- ▲ Bee2See
- ▲ Deloitte Touche
- ▲ DesignIT
- ▲ E&Y
- ▲ E-force
- ▲ Gil Kochavi
- ▲ IBM
- ▲ Matrix Digital & CX
- ▲ Ness-Pro
- ▲ One1 Digital (Stanga)
- ▲ YCG (CX)

* Alphabetical order, not a ranking!

Web Accessibility tools (“Negishut”)

Company	Product Name	Integrators
User1st	User1st Accessibility Suite	Taldor, Matrix, Realcommerce, Ewave, NGSoft, Pionet
Interdeal	Nagich by click	Interdeal
DoubeDu	Make Sense	-
Mavkyim	inclusite	Mavkyim Software Solutions, One1
U.A-User Accessibility	Andi UI	-
eXite	accessi.do	-

Output Management tools

Company	Product Name
Docomotion (Autofont)	FreeForm
Aman	FormIT
Consist	Printbos
ComposeDoc	ComposeDoc
ActivePath (Smartx – partner)	-
Adobe	LiveCycle
HP	Exstream

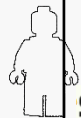
Digital experience analytics (owned media)

- An evolution of web analytics – Digital Intelligence
- Analysis of customer experience in digital channels (owned media)
- Ability to drill down to a specific session (recording)
- Control customer views based on rules
- Spot experience patterns
- Connect digital customer experience data to transactional data (CRM/DW)

Product	Rep. in Israel
Tealeaf	IBM
Clarisite	Ness-pro
SAS CXA (Customer Experience Analytics)	Mia Computers

CRM Packages in Israel - Part 1:

Package	Description	Israel rep.	Integrators
Oracle Fusion CRM	SaaS or on-premise	Oracle Israel	Excientia, Taldor, Oracle
Oracle – Siebel	On-premise CRM suite		Taldor, IBM, Matrix (BeyondIT), Unitask Exscientia, TATA-TCS, Yael
Oracle ServiceNow	Service multi-channel, SaaS		Yael Software
Oracle - Peoplesoft	CRM suite on premise		Matrix
Salesforce.com	SaaS CRM suite	Salesforce	All Cloud, Service Wise, Clou dius, One1Link (Balink), Accenture, Delloite, IBM, Yael, NPtech, TATA-TCS
SAP CRM	CRM suite on premise	SAP Israel	Hilan (Ness), Advantech, ValuePlus, Fishman Dambo
SAP C4C	SaaS CRM suite		Xioma, Hilan (Ness), Valueplus, HP, Malam-Team, E&Y, Deloitte
Microsoft Dynamics CRM	New version- SaaS and off-premise	Microsoft Israel	Partial: Matrix, ,Elad, e4D, Malam-Team, Aman, Prodware, SIT, Hilan, One1, Taldor...

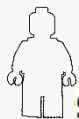


CRM Packages in Israel - Part 2:

Package	Description	Israeli Rep.	Integrators
MEGA Center	On premise	Yael	Yael Software
 SugarCRM	Open Source on / off premise		
Pivotal	On premise	One1	ONE1
Netsuite	SaaS	NetCloud, One1	NetCloud, One1
MyBusiness	SaaS	MyBusiness	MyBusiness
Amdocs (Clarify)	On Premise	Amdocs	Amdocs
Zoho CRM	SaaS	HolisticCRM	HolisticCRM

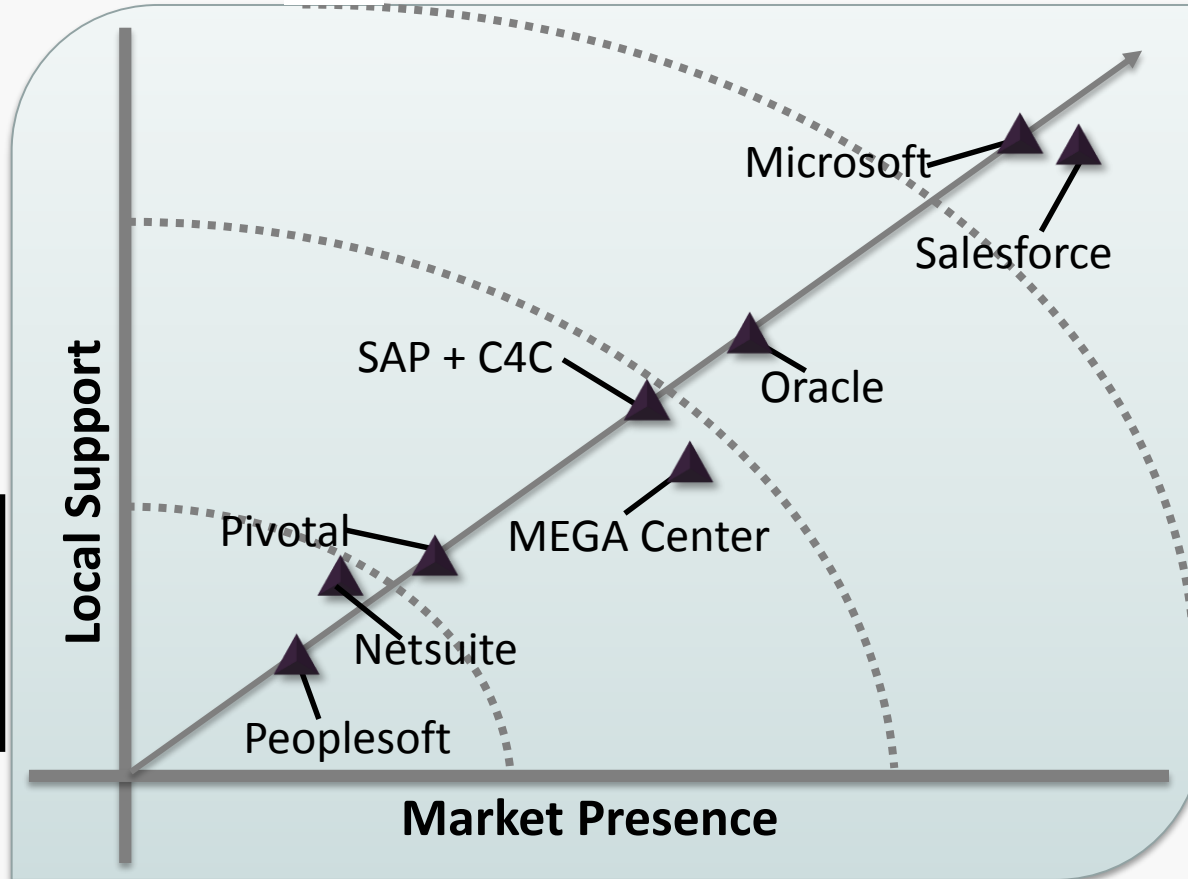


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CRM - Israeli Market Positioning 2016



*This analysis
should be used
with its
supporting
documents*

CRM Consultants in Israel - Partial List

- ▲ Accenture
- ▲ Alternative
- ▲ B-Pro
- ▲ Deloitte Touche
- ▲ IT solutions
- ▲ Lior Luria (+multichannels)
- ▲ Matrix
- ▲ Meteor
- ▲ Nogamy
- ▲ ROI
- ▲ Sensecom
- ▲ Widelink
- ▲ Value Plus
- ▲ Several independent advisors

* Alphabetical order, not a ranking!

ERP Packages & Integrators: Part 1

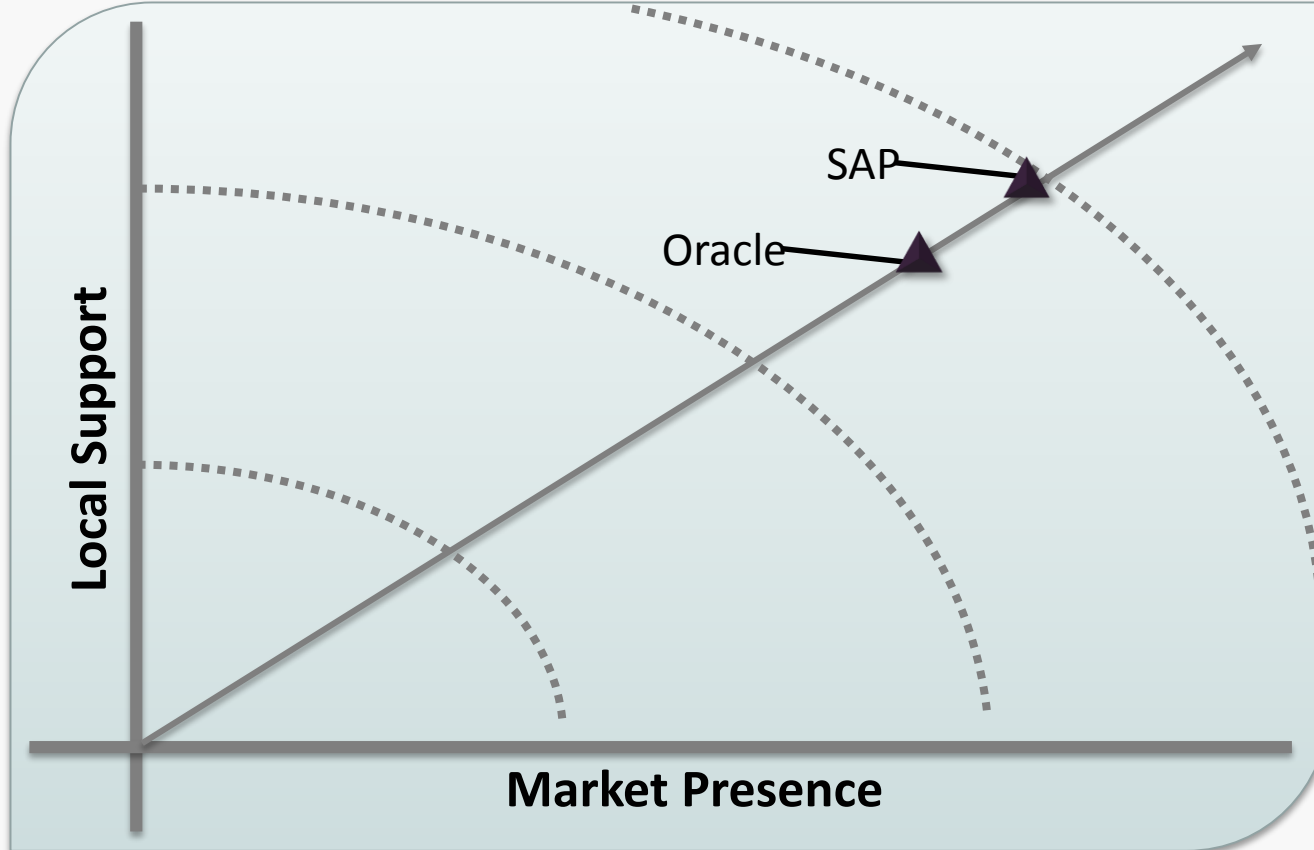
Package	Israel Rep	Integrators
Oracle e-Business Suite	Oracle Israel	ONE1, Advantech, Unitask,), Yael, Oracle consulting, HP, PWC, TATA (TCS Israel)
SAP	SAP Israel	Hilan (Ness), IBM, Taldor, Advantech, Malam-Team, HP, TATA (TCS Israel), Accenture, Aman, Matrix, One1 (Xact), IGC (Financials), S.D.M, Convista Israel (SAP for Insurance)
SAP All-in-One		Taldor, Advantech, Hilan (Ness), Malam-Team (Malam Express), CBIT, SAPLM
SAP Business One		Xioma, Complete, Menahel4U, Todan, BDO Ziv Haft, Ziv systems, RELS, Smartsys
E-Tafnit, Tafnit 7	Matrix	Matrix, Alpha Consultants
QAD	SIT	SIT, ManofIT, Tirosh
Priority	Eshbel	Medatech, FBC, Edea, Agrosoft, EDP, eBase, Soft solutions, Prioricity, EliteERP, Infobase, Gap, Tirosh, Eshkol, IT Backoffice, Pitronim, SIBUD, Login, Tadiad, Epilog, ERP Guru, Effective implementations, Dsi, T.G.Net, Open Mind, Yael (Tulip), Kama, Eshbel
Infor (M3)	Intentia Israel	Intentia Israel
ONE1View	ONE1	ONE1, Anagal, Y. Ovitz, Jiny consultants
KAV systems	Kav	Kav, Ardorm
Aviv, MARS	Aviv	Aviv

ERP Packages & Integrators: Part 2

Package	Israel Rep	Integrators
Microsoft Dynamics AX	Microsoft Israel. Distribution by Prodware	Prodware, Malam-Team, Oregano, Maxsoft, Axperts, Almog, MCS
Microsoft Dynamics NAV		Prodware, Malam-Team, Anagal, Dover Applications
FinPro, Logistic Pro	Almog	Almog
Gan Tochnot Heshev (Kibbutzim) Azimut (Car) ERP Plus (cross-sector)	Aman	Aman
Comax	Comax	Comax
Netsuite	NetCloud, One1	NetCloud, One1, Accenture
 OODO (formerly Open ERP) – open source ERP	Yael	
IFS	Teldan	
LN Infor	Matrix	Matrix
ERP Focus	Malam-Team	Malam-Team

1. L + XL ERP - Israeli Market Positioning 2016

Large and Very Large ERP projects (>300 users, large enterprises)

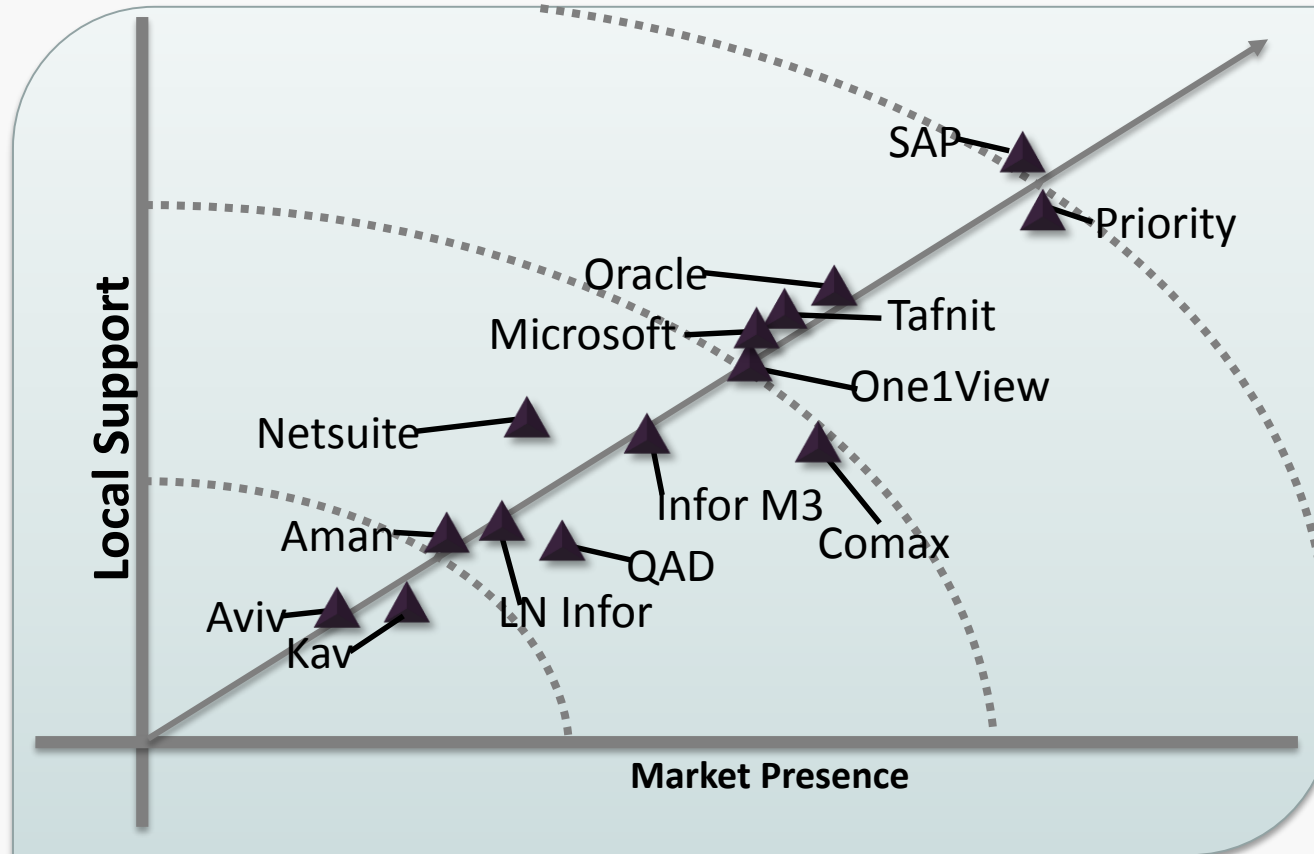


Not much had changed...

This analysis should be used with its supporting documents

2. SMB + Mid-Market ERP - Israeli Market Positioning 2016

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



**Bigger deals
in 2015**

*This analysis
should be
used with its
supporting
documents*

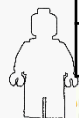
ERP Consultants in Israel - Partial List

- ▲ Accenture
- ▲ Alternative
- ▲ Bit-Plus
- ▲ Deloitte Touche (+ Seker)
- ▲ Ernst & Young
- ▲ Gabi Ron
- ▲ HMS
- ▲ IT Solutions
- ▲ Meteor
- ▲ Nextep (Hasas Bashan)
- ▲ That's IT
- ▲ TCS Israel - Tata
- ▲ Value Plus (SAP)
- ▲ Yael (Tulip)
- ▲ Several Independent advisors

* Alphabetical order, not a ranking!

HCM, Payroll & Talent Management suites

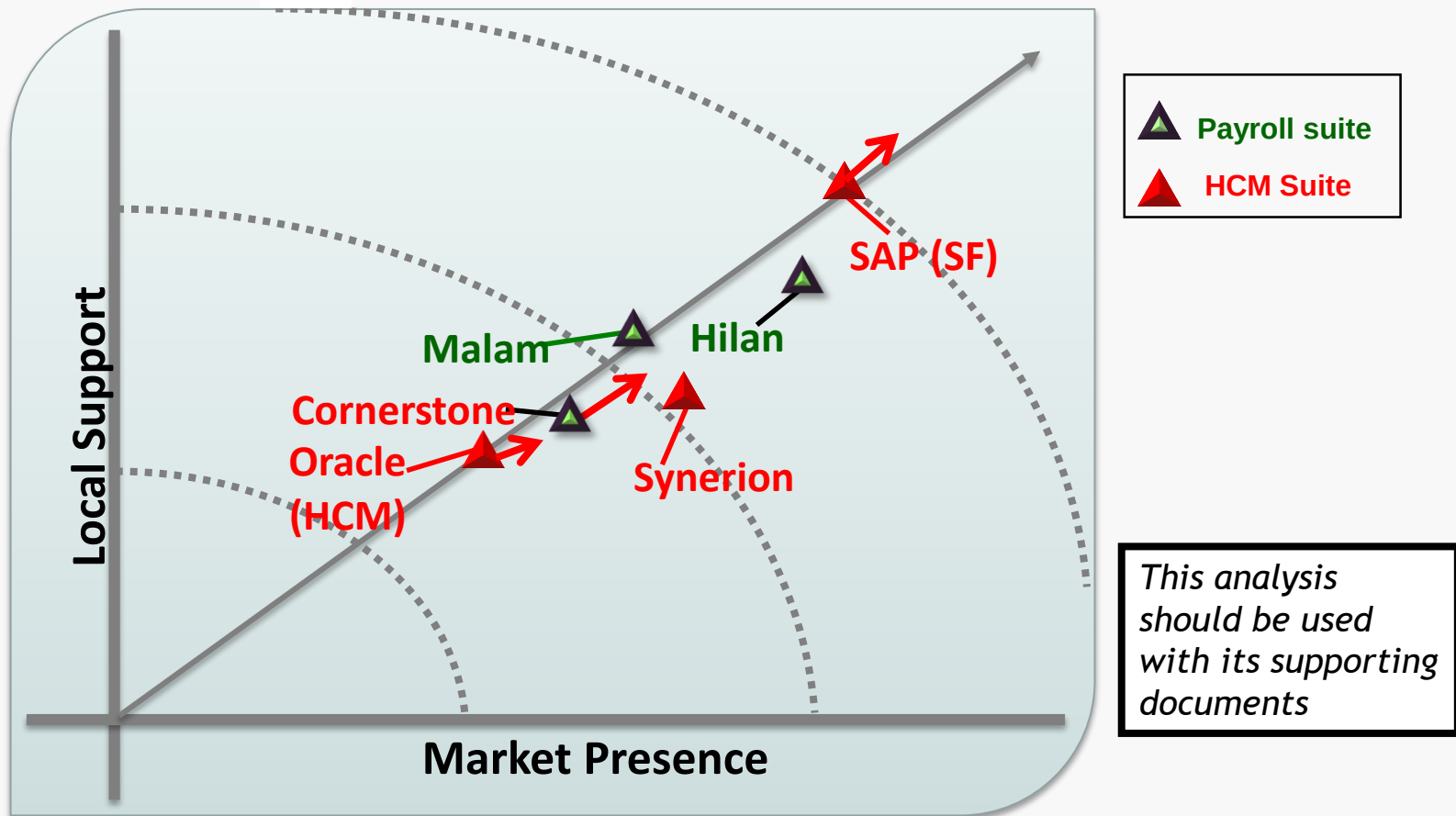
Package	Category	Rep. in Israel	Integration partners
Oracle, Fusion HCM	Core HR, Payroll, Talent Mng.	Oracle Israel	Unitask, Oracle
SAP, Successfactors, Nakissa, Workforce analytics, WPB	Core HR, Payroll, Talent Mng, Org. Chart	SAP Israel	AKT, IBM, Accenture, Malam-Team, Niram Gitan - NGG, Advantech, PWC, Complete (with Lotan), Julius IT Boutique, One1 (Xact), Ness Training – WPB, Deloitte
Hilan	Core HR, Payroll, Talent Mng.	Hilan	
Malam Payroll	Core HR, Payroll, Talent Mng.	Malam-Team	
Cornerstone	Talent Management	Matrix John Bryce, Talentech	Matrix John Bryce
Synerion	Time and attendance, core HR, Talent Mng.	Synerion	Synerion
IBM (Kenexa)	Talent Mng.	IBM Israel	Pilat
Workforce Software	Time and Attendance, Workforce Mng.	AKT	AKT
HRM	HR - Hire to Retire	Prodware	Prodware



LMS only (Learning Management Systems)

Package	Category	Rep in Israel
Blossom	LMS	Blossom, Eltel (Malam-Team)
Bareket (Britannica), FOX	LMS	Britannica
Kopel Reem	LMS	Kopel Reem
Eltel	LMS	Eltel
Wendimu	LMS	Ewave, Ness-Pro
 Moodle	LMS	Ness Training
Totara LMS (based on Moodle)	LMS	Kineo
Power Shelf	Mobile Learning	John-Bryce

HR & Talent Mng. Suites- Israeli positioning 2016



BI General Platforms - Part 1:

Package	Rep in Israel	Integrators
SAP Business Objects, Predictive Analysis, Lumira	SAP Israel	MatrixBI, Advantech, Taldor, Malam-Team, One1 (+Xact), Hilan, Skywind, IBM, BDO (BICS), Iprosis, Data Cubes, Activeview, HP, Aman (Eternity), Xioma, Opisoft, Nogamy
Microsoft (SQL, SPS, Power BI, DataZen)	Microsoft Israel	Aman (Eternity), Opisoft, Hilan, ONE1 BI, MatrixBI, Consist, Advantech, Bynet SW, Elad, Malam-Team, Libi, Enix (Experis), Data Cube, Vision BI, MCS, SolidBI, MOSS partners, Activeview, Nogamy
Pyramid Analytics	Pyramid Israel	Libi, Aman (Eternity), Malam-Team, VisionBI, Datacube, Valinor, Sabres, MatrixBI, Hilan (Ness), Opisoft
IBM – Cognos	IBM Israel	Activeview, Libi, Opisoft, Seven-D, Hilan, Consist, Aman (Eternity), Advantech, IBM, Mirkam (Energy), Malam-Team, ONE1 BI, Normative, MatrixBI
IBI - WebFOCUS	Omnitech (SRL)	Malam-Team, Hilan, ALD
Oracle OBI EE, BI Apps, Endeca	Oracle Israel	Oracle Consulting, Taldor, Hilan, Data Cube, Vision BI, Enix (Experis), Business & Decisions, Advantech, Aman (Eternity), Yael, IBM, ONE1 BI, Malam-Team, Matrix BI, Naya, Nogamy, Businesswise sol.(BI APPS)

BI Platforms - Part 2:

Package	Rep in Israel	Integrators
SAS, VA	Mia Computers	Mia computers, Hilan, Actiview, Pareto, HMS, Antropy, Liran Lavi, Goldmines, Nogamy
Panorama Novaview, Necto	Panorama	Matrix BI, Hilan, Consist, Data Cube, ONE1 BI, Business Solutions, Citrine BI, VisionBI, Aman (Eternity), Opisoft, Nogamy
Microstrategy, Visual Insight	Mittwoch	Mittwoch, MatrixBI, Nogamy
Sisense	Sisense	One1
Yellowfin	Activeview	Activeview
Pentaho – acquired by HDS	Bynet	Bynet SW, Aman (Eternity), Tikal, Malam-Team, MatrixBI
Jaspersoft – Acquired by Tibco	Yael Software	Yael Software
Qlikview, QlikSense	Hilan – Qlikview Israel	Hilan - Qlikview Israel, SenseBI, Hilan (Ness), Datamine, Complete ,Tirosh , Servit ,Enix (Experis), Sense (Michshuv), Ludan, Libi, FBC, Qset, Green House, Oregano, Menahel4U, Anagal, DtBit, ONE1 BI, Malam-Team, MatrixBI, Nogamy, Taldor, Deloitte analytics
Spotfire (Tibco)	Yael Software	Yael Software, Hilan
Tableau	SIT, Gstat	SIT, Gstat, MatrixBI, VisionBI, Consist, Nogamy, Activeview
 SpagoBI	Open Source	



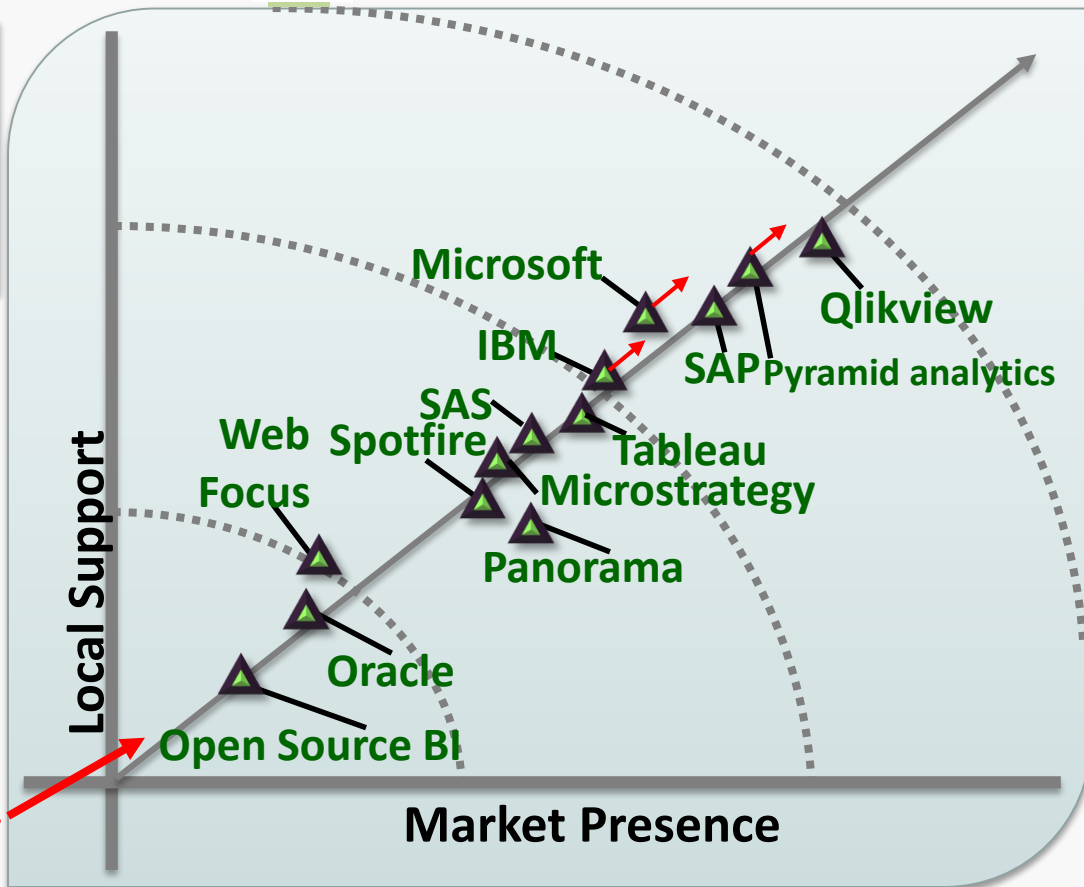
Open Source BI Platforms:

Product	Rep in Israel	Integrator
Jaspersoft – Acquired by Tibco	Yael Software	Yael Software
Pentaho – Acquired by Hitachi	HDS	MatrixBI
SpagoBI		MatrixBI, One1
BIRT (Eclipse)		

BI & Discovery Analysis tools - 2016

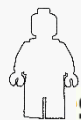
Players to watch:

Sisense
Yellowfin
Jasper (Tibco)
Pentaho (HDS)



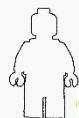
This analysis should be used with its supporting documents

Low support for
OS BI in Israel!



Predictive, advanced analytics, ML:

Package	Rep in Israel	Integrators
SAS, VS, text analytics	Mia computers	Activeview, Antropy, Goldminers, 7 th Dimension, Finity, Appsgrade, Pareto, E&Y, KPMG, Bynet SW
NBO	Gstat	Gstat
IBM SPSS, Watson	IBM Israel	Genius, Bee2see, IBM
 Portrait Miner	S.P. Data	Qlikview Israel
 R Statistics		Gstat, MatrixBI
SAP Predictive Analysis	SAP Israel	Iprosis, Matrix
CB4	CB4	Nogamy, CB4, Ness-pro, HMS
 Microsoft Cortana Analytics suite	Microsoft	Intuit, Advantech, Opisoft, Aman (Eternity)
 DMway	DMway	DMway
  RapidMiner		3base (Taldor)
  Knime		3base (Taldor), Nogamy
  Weka		3base (Taldor), MatrixBI
Python		3base (Taldor), MatrixBI



Big data analytics tools (Partial list) - Part 1:

Package	Israel Rep.	Integrators	Description
Neo4J	 Open Source	Ness-pro	Graph database, data modeling
Dato			Machine learning analytics
Orange			Analytics (+ML)
Knime			Analytics
Rapidminer			Analytics (+ML)
Weka			Analytics
R			Analytical libraries
Elastic		We-Ankor, Matrix, Hilan (Ness)	Unstructured data analysis
SolR		Matrix	Unstructured data analysis

Big data analytics tools (Partial list) – Part 2:

Package	Israel Rep.	Integrators	Description
IBM Big Insights, text analysis, Watson analytics, Infosphere streams	IBM Israel	IBM, Ankor	Analytics, text analysis, cognitive
SAS	Mia computers	Mia computers	advanced analytics, text analysis
Teradata Asterdata	I.E.Mittwoch	I.E.Mittwoch	Big data discovery platform
HP “Haven”, Idol	HP Israel	HP, Twingo (Vertica), MatrixBI	Unstructured analysis, entity extraction, speech to text, audio analytics, Video analytics, face recognition...
Kapow	Ness-Pro, Taldor	Ness-Pro, Kapow	Web data extraction

Analytics, Predictive analysis & data mining tools - 2016

Players to watch:

SAP

Microsoft

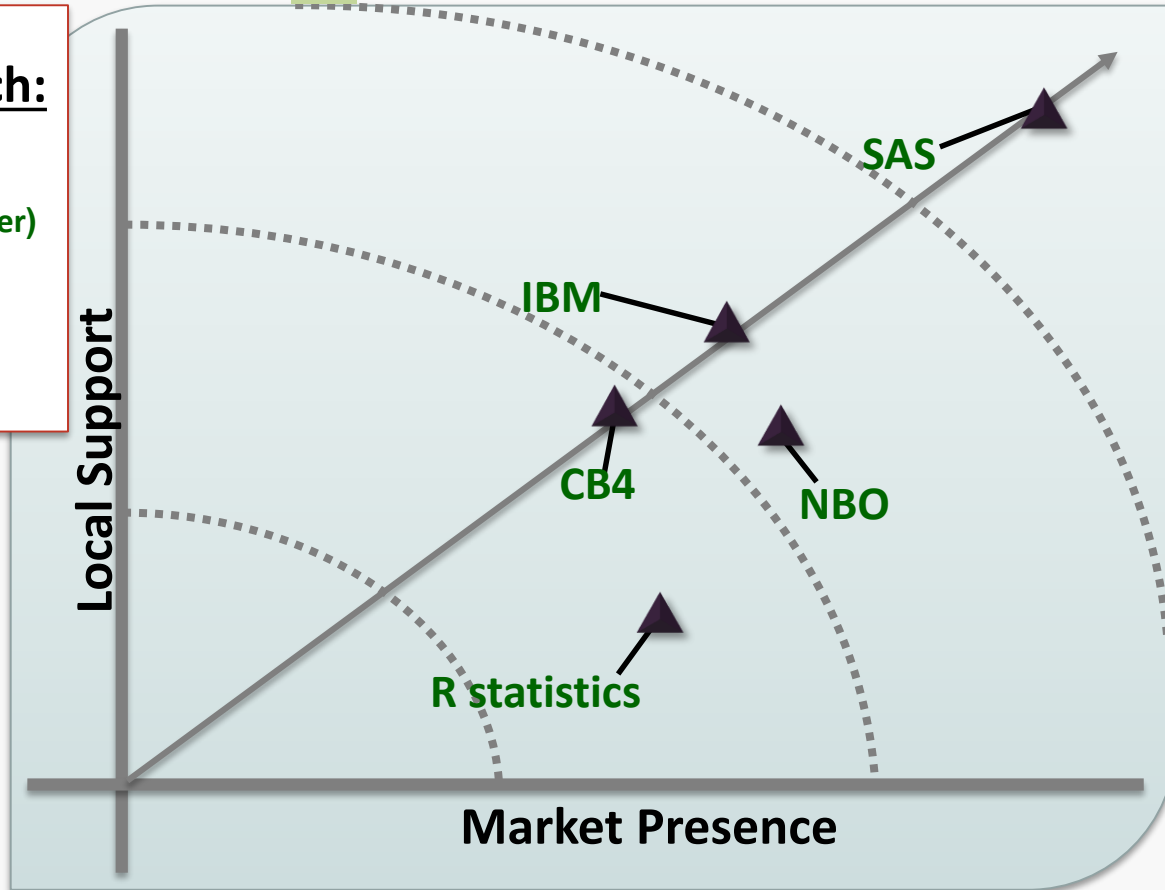
BIHavior (Portrait Miner)

Dmway

RapidMiner

Knime

Weka



*This analysis
should be used
with its
supporting
documents*

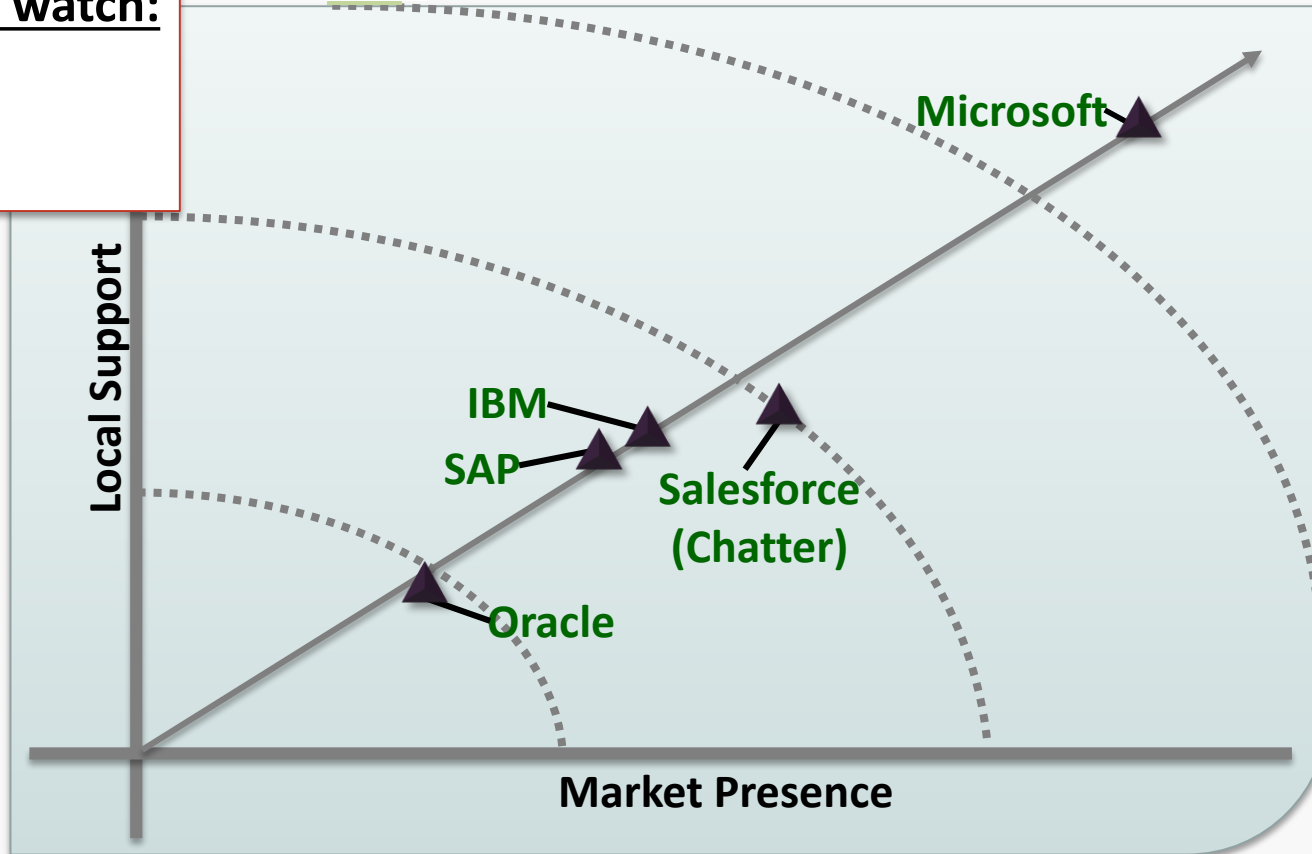
Portals & Social Networks : Players in Israel

Company	Product name	Integrators
Microsoft	SharePoint portal server Yammer	Advantech, Top Soft, Aman (+Eternity), Bynet, Malam-Team (Guardian), Ewave, Hilan (Ness), Matrix, Tvuna milenium (SQLink), ELAD, HP, One1, Yael, Methoda, UCL software, UBTech and more...
IBM	Websphere Portal, Connections	IBM, Matrix, Web Tech, Novilis
SAP	SAP Portal + SAP Jam (social)	Hilan (Ness), Taldor, Malam-Team, One1, Advantech, HP, IBM, Skywind
Oracle	Oracle Portal, Web Center	Matrix, Ewave, Taldor, Advantech, Unitask, Malam-Team, Oracle Consulting
 Liferay (open source)		Matrix, Webtech, Malam- Team
Salesforce	Cloud social network	One1, All-Cloud, ServiceWise
Harmon.ie	Social & collaborative solutions	Bynet, Yael
Confluence (Atlassian)	Wiki and collaboration	Methoda
 Jive	Jive	Socialknowledge
 Elgg (open source social network)		

Enterprise Portals & social tools - 2016

Players to watch:

- ▲ Liferay
- ▲ Jive
- ▲ Eigg



This analysis should be used with its supporting documents

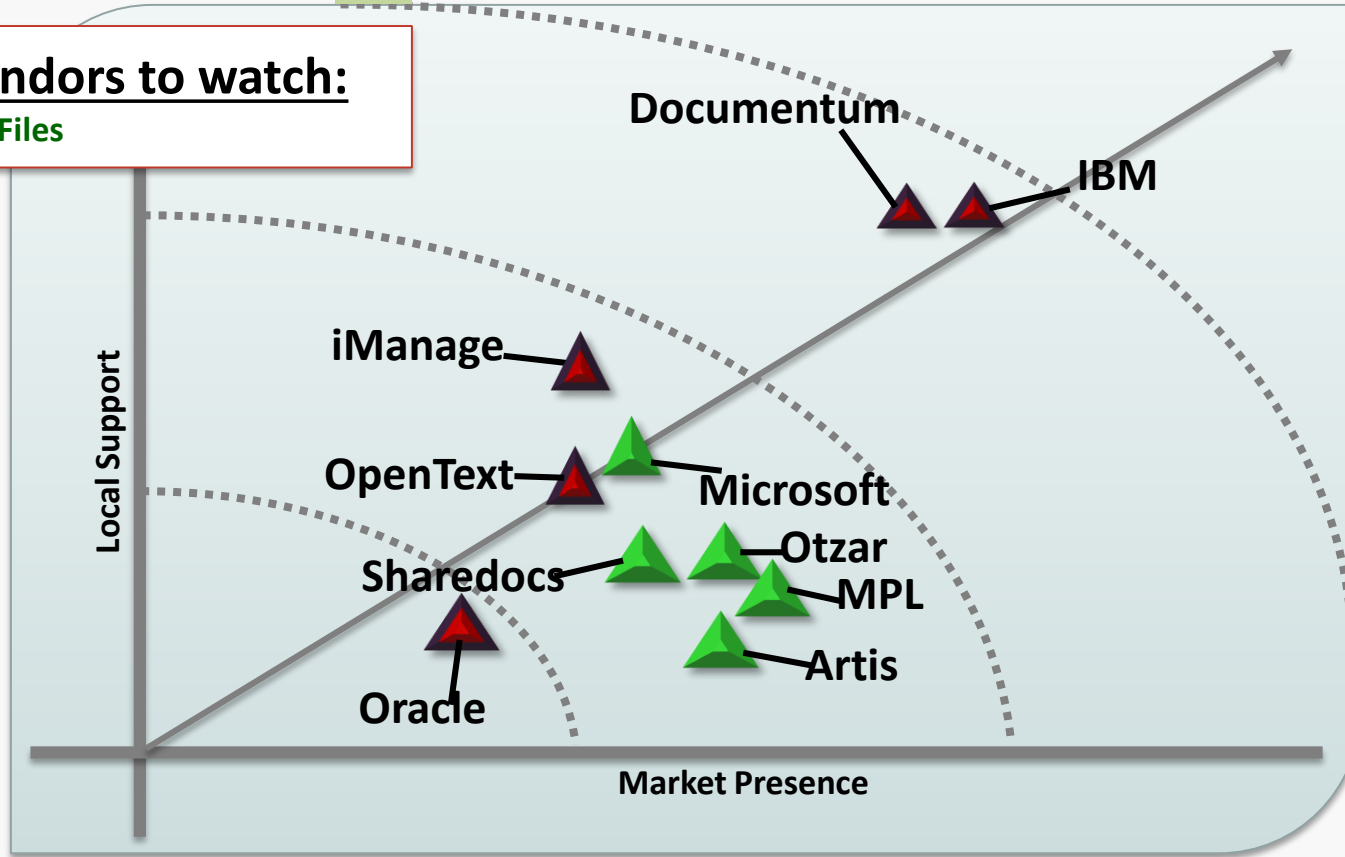
Internal ECM players in Israel

Product	Israeli rep.	Integrators
EMC-Documentum	EMC, Ness-Pro	Ness-Pro, Accenture
IBM- Filenet	IBM Israel	Yael- IFN, Integrity Software
Open Text	Omnitech (SRL), SAP	Malam- Team, Advantech
iManage	HP, Xioma	Xioma
SharePoint	Microsoft	Many ISVs – SPS integrators
Oracle Webcenter	Oracle Israel	Integrity Software, Malam-Team
Sharedocs	Elad	Elad
Otzar	Aman	Otzar, Aman
Ada system	Artis	Artis, Taldor, Malam-Team
MPL (+SPS based version)	MPL	MPL
M-Files	ADMS	ADMS

ECM - Israeli Market Positioning 2016

Vendors to watch:

▲ M-Files



▲ High-End Player
▲ Mid-tier Player

This analysis should be used with its supporting documents

Enterprise Search players in Israel

Product	Israeli Rep.	Partners
Autonomy	HP	Xioma, Matrix, Elbit, Taldor
Microsoft- FAST	Microsoft	Many ISVs – One1, Matrix...
Google Enterprise Search	Yael	Yael, Do-It
Attivio	Matrix	Matrix, Yael, Ness TSG (IAI)
Content Analytics	IBM	Ankor
Oracle SES, Endeca	Oracle	
 Solr – open source search based on Lucene (Lucene – open source search engine) + HebMorph (Hebrew morphology addon)		Matrix
 Elasticsearch – open source search based on Lucene	We-Ankor, Matrix	We-Ankor, Matrix
*** Melingo-Morphology	Melingo (Matrix)	Matrix, many API partners

KM Consultants- Partial List

- Byon
- Digidoc- Document Management
- Deloitte (Ergo)
- Gait- Document management
- IT Solutions
- Know-edge
- Matrix
- Methoda
- ROM Knowledgeware
- Yael

* Alphabetical order, not a ranking!