

Israel IT Market Study 2025 Part 2



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI
Analyst



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

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



Einat 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



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



Pini has been working in STKI since 2000, Pini holds a BSc 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

STKI Research Team



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Methodology and how to “understand” the results



Dr. Jimmy Schwarzkopf



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

Over **33 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.





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 Innovation Workshops
- In-house Workshops
- CIO Annual Meeting (during the summit)
- COO Community meetings & workshops
- OCIO Community meetings & workshops
- CTO Community meetings & workshops
- 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



What did STKI Analysts do in 2024

→ **For Users of Technology:** Frontal & Video Presentations, Meetings & Budget Analysis

→ **For Vendors of Technology:** Frontal & Video Presentations, Meetings Briefings & Sales Analysis

→ **XOOs of Presentations** (Frontal and video)

45 Round Tables
64 Webinars
2 Summits per year

→ **Israeli Annual IT Market Study**



250 CIOs
16 Industries

456 Vendors
150 Categories
Over 1000 Products/Services



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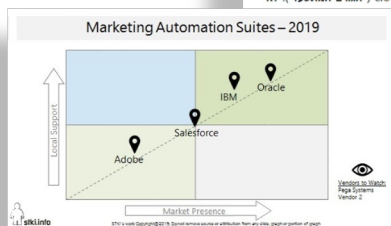
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	industry	Budgets 2013	Budgets 2017	% growth
	media/content	\$100	\$175	75.00%
	advertising	\$190	\$265	39.47%
	SMB/SME	\$300	\$400	33.33%
	security	\$400	\$506	23.41%
	government	\$1,250	\$1,530	22.40%
	retail	\$195	\$230	17.95%
	education	\$230	\$270	17.39%
	first mile	\$290	\$325	15.52%
	high tech	\$220	\$252	14.55%
	manuf	\$810	\$880	8.64%
	transport	\$305	\$325	6.56%
	banks	\$815	\$865	6.13%
	IT local vendors	\$150	\$160	6.67%
	insurance	\$400	\$395	1.25%
	utilities	\$285	\$237	-17.44%
	telecomm	\$250	\$200	-20.00%

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



- Projects
- BDO
- Byon
- laTapas
- vo-it
- Wave
- HPE
- ethoda
- tegiClear
- raSky

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

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



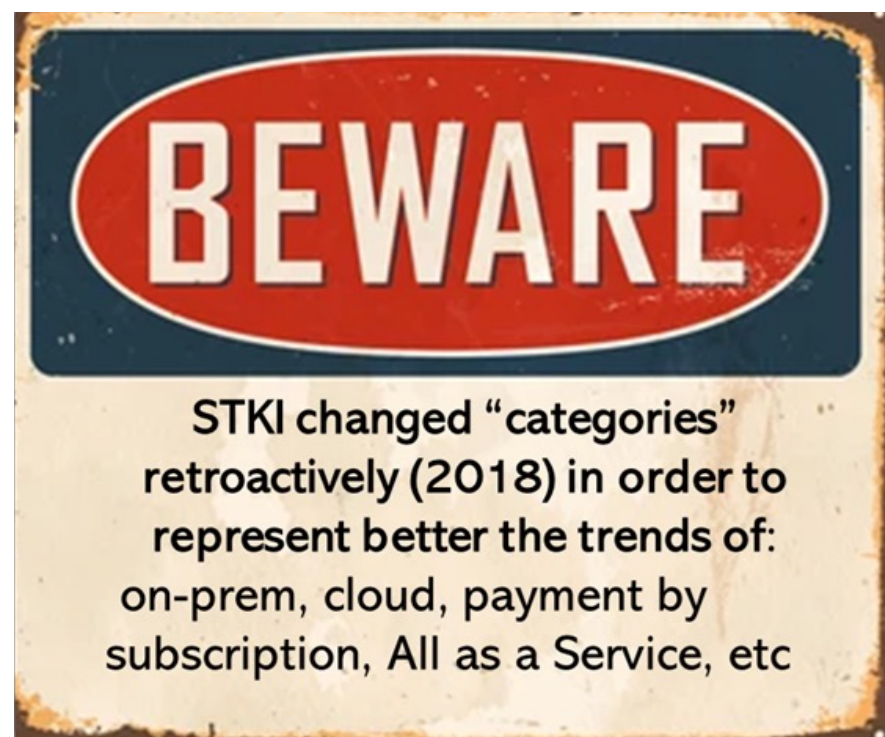
STKI Research Results:

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STKI Methodology: Equilibrium model

The sum of all enterprise's (public, private & government)
IT expenditures (procurement budgets)
must be at least 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)

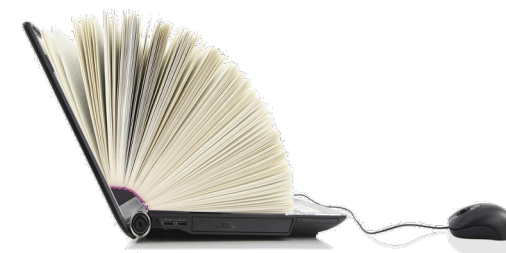
Technology Users

What users bought?
From whom?
Why?



Technology Vendors

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

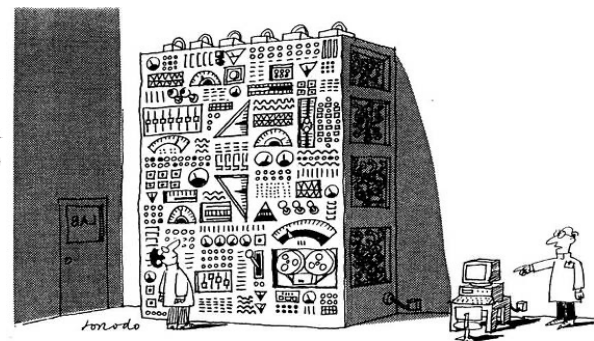


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That's just to impress STKI'S analysts. This is our real results



We rank VENDORS
by REVENUE and
CLIENT MINSHARE

Our study is based on
hundreds of **VENDOR BRIEFINGS**,
vendor answers to our surveys and takes
into account client's procurement
strategies, their view/mindshare of value
delivered by vendors during the year 2024



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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 vendors **have to participate in a detailed vendor briefing** with our analysts and answer a detailed survey; what **they don't have to do is be clients** of our services.





Vendors page #1

10Secure
Stream11
2bcloud
3Bears
SIVE
10A
A2Z
ABP Consultancy Israel
abra
Accelario
Accenture
Accesslayers Portnox
Acoustic
Acronis
ACS
Actifio
Adobe
Advantech
Afek Systems
Agile Experience
Agile Spirit
agilepoint
AgileSparks
AGINIX
AI Smart Stream
Ajimeh
Akamai Technologies
akt
Alation
ALEXANDER SCHNEIDER



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Algosec
Algotrace
Alibaba Cloud
Allyable
AllCloud
Allegronet
All Trade Group
almog
ALMtoolbox
ALTAIR+RAPIDMINER
Alteryx
Aman
Aman Digital
Aman Digital
Aman by Twilio
Amarel
amazon
amdocs
ANAGAL
anodot-Pileus
APC by Schneider Electric
appian
Appium Documenation
APPLAUSE
Apple
Applicat
applitools
APPSOLUTI LTD
APPTIO Cloudability
aquesec
arcserve
ARDOM
ARISTA
Artis Multimedia
Asperii-Aman
ASUS
ATERA
Aternity
ATLASSIAN

AUTOMAT-IT
AUTOMATION ANYWHERE
AutoMonX
AVAYA
AVCOM
AVCS
AVNET
balink
BARMOR (EMET)
Barracuda
Bay Bridge Digital
BCG
BDA Projects
BDO
BDO - Meteor
Be2See (EMET)
Be-Digital
BeLocal
Bezeq
Bezeq Int
BGATE
Biconix
BigFix by INTEGRITY SOFTWARE
Bileader
BIT PLUS
Biyond
BIZ AID
BlackBerry
BMC
BO
boomi
B-PRO
Brillix
BROADCOM
BROADCOM - Cloud Health
Brocade

BUGSEC
bulwarx
BunkerSec
Business & Decision
Bynet
Bynet Cloud
Bynet Data Center
Byon IT Solutions
C4 Systems
Calanit by ONE
Calcom
CALLBOX
Capito
Carmelon
CATO NETWORKS
celigo
Cellcom
Centerity Systems
CGS
Chayon (Alltrade)
CheckMark
Checkmarx
CHECK POINT
Ciklum
Cisco
CISOteria
Citadel (Emet)
Citrix
clarizen
CLEARSKY Cyber Security
CSG (Citrix)
CSG (Tibco)
CloudAdvise

Cloudbeat
CloudCheckr
CloudEdge
Cloud'em (Emet)
CLOUDERA
CloudFabrix
CLOUDFLARE
CloudHealth
CLOUDIAN
Cloudius
Cloudofthings
Cloudrize
Cloud Team
Cloud Valley
CodeOasis
CODEVALUE
Cofense
Cognit
Cohesity
Colibra
Comax
Comda
Commbox
Commit
commit data by Valinor
Commugen
Commvault
compie
complete
ComposeDoc
Comsec
Comsec By Hub Security
CONFLUENT
Consist
ControlUp

Convertio
Copera (Emet)
CORNING
Couchbase
Creatio (by Proceed)
CrowdStrike
CTM
CyberArk
CYBERcom (Emet)
CybeReady
Cyberint
CyberProof
CyberTeam360
CYBONET
Cymulate
Cynet Security
Cyolo
Cyrebro (CyberHat)
DANET COMMUNICATIONS
Dario IT Solutions
Datacube
datamind (business intelligence)
DataRobot
DATA SCIENCE GROUP (dsg)
DATA tapas
DB DATABANK
databricks
DATADOG
dataiku
Data Partners
DATA PRO
datricks
DB Best Technologies (by Amazon)
db@net
DBArt

DBmaestro
DCOYA
Dell Technologies
Deloitte
denodo
Designit
develeap
DEX
Direct Experts (DEX)
DIT deggendorf institute
of technology
DMway
DnA-IT
Docomotion
DOFiNiTY
DoiT
Dorcom (Emet)
DOR-IT
Dr Agile
druva
dynatrace
E2m
E4D
Easy Qlik
EasySec Solutions
EDEA
EdgeconneX (Global D)
edp
Elad
elastic
Electra
ELK
EMEREST
EMET
EMET Data
EMET Defense

Energy Team
EnsureDR
ENTROPHY
equalum
ERA
ERGO
ESI
ericsson
ermetic
eset
Eshnav-Aman
Eternity-Aman
evo-it
Evolution
EVOLVEN
Ewave
EXAGRID
Experis
Experity
EY
ez-ROI
f5
FADDOM
FBC
Fibernet
FireEye
Flexera (SnowSoftware)
FMR
force majeure
Forcepoint
FORESCOUT
FORTINET
Freshworks
FUJITSU
galil software

Gartner
GBS
Generic Tech
Genius (SQLink)
Genpact (pbnsoft)
GigaSpaces
GitLab
GIV Solutions
Global Data Center
GlobalLogic
Google
Granulate
Great (Digital Partners)
GRSEE
G-STAT
HashiCorp
HCL
HCL Unica
HDS
HEAD-ON
HESTRIX
Highnet
HILAN
HILAN-NESS
HILAN-NESS H-ERP (Hashavshevet)
HILAN-NESS-QLIK
HILAN-NESS-WE ANKOR
HILAN-WE ANKOR
Hitachi Vantara
HMS
HMS C-Way
Holistic - ZOHO CRM
HP
HPE

HubSpot
I.E.Mittwoch
IBM
IBM Innovation Lab
icloudius
icoNduct (Emet)
ICS security
ICTBIT
IDC
IDEO DIGITAL (Emet)
iguazio (McKinsey)
Illusive
Illumex
ilu-Rak
IMMUTA
imperva
imprivata
Infinitat
infinipoint
Informatica-Aman
Inkod
innoSec
INNOVA (Emet)
innovad
InsFocus
intact software
Integrallis
INTEGRITY SOFTWARE
intentia Israel
INTERNET GROUP
Interserv (Emet)
InterSystems
iprosis
IP-Sec
IP Security







Rankings are based... : important please read

We rank VENDORS
by REVENUE and
CLIENT MINSHARE

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

- › **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**.





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



VALUE ADDED

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

Integrators and other Value-Added Service Providers get **credit ONLY for the "services-work" they CONTRIBUTED** TO THE PROJECT.

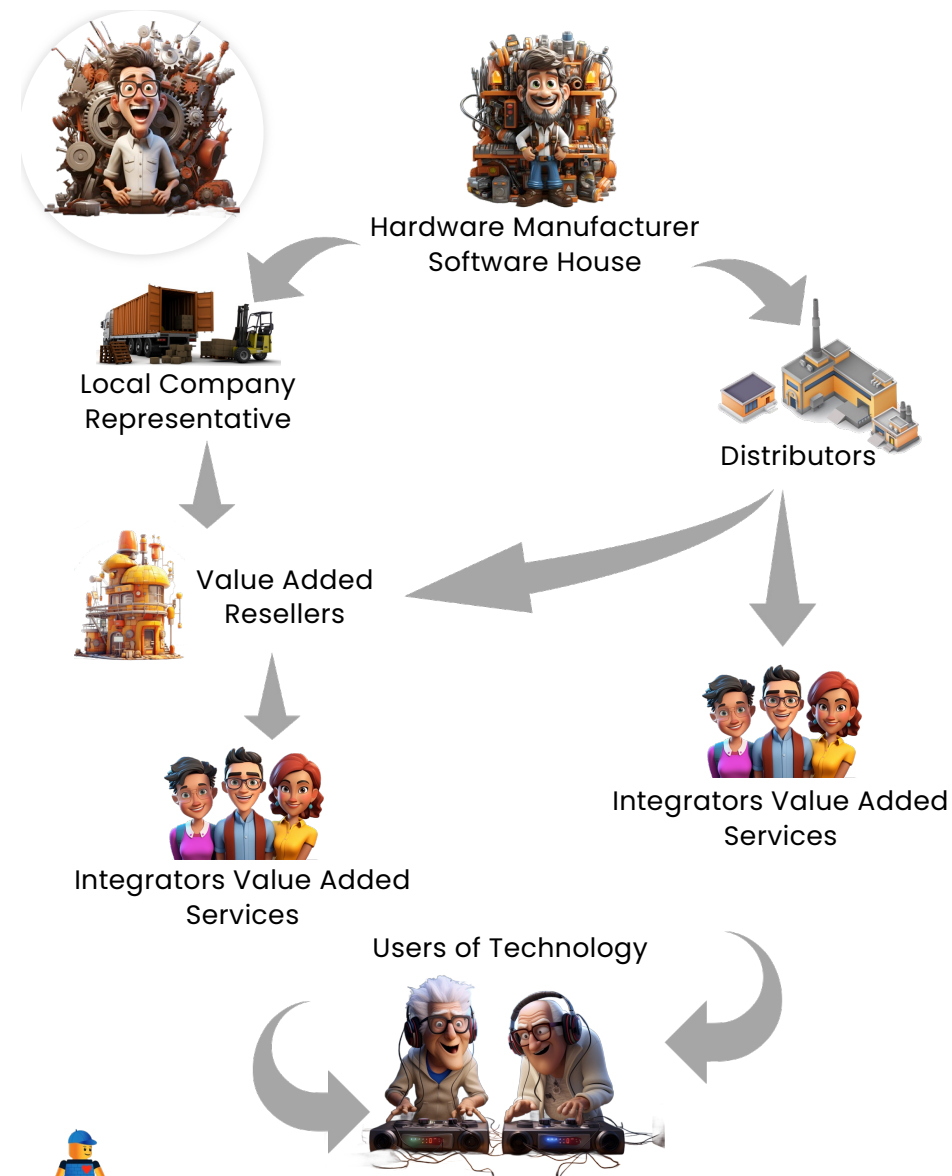


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DISTRIBUTORS (usually are not shown in our study) are intermediary reseller entities; between the original **MANUFACTURERS OF HARDWARE PRODUCTS** or **SOFTWARE HOUSES** and other entities in the distribution channel (VARs and INTEGRATORS).

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

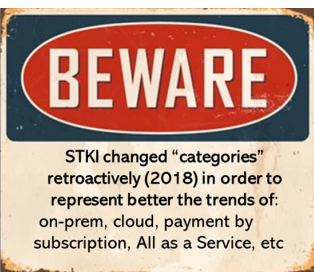
INTEGRATORS offer *professional's services* (consulting, developing, implementing or sourcing manpower) in order to deliver enterprise computer services to the organization. *(shown in section VALUE ADDED SERVICES)*.





USER of IT

VENDOR of IT



CATEGORIES

33 Years of Data about "user" Budgets and Procurement Strategies

33 Years of Data about "VENDOR" Sales of Hardware, Software, Cloud Services and Other Value-Added Services



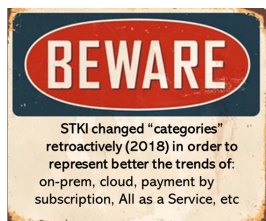
IT Trends
2025-2027



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Over 160 Categories (Revised)

Infrastructure Products & Services

servers X86
Legacy (non-x86)
Data Appliances and AI computing
HCI appliances
Window PCs (Notebook & Desktops) Enterprise only
Non window's PC's Enterprise only
Enterprise Storage :Disks (HHD and SSD)
Other Storage HW - Tape Libraries & appliances, VTL Backup
Storage Networking
Enterprise Networking
Security / Cyber Appliances
VoIP/Call Center Equipment
Call Center as a Service
Data Center Physical Equipment
Off-site Data Center: Co-Location; Hosting (Client owns the HW)
POS +Self Service (ATM/Kiosks/other)
General Purpose Cloud 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)	Data Governance and Management Tools (including data catalogs, ETL, quality, cleansing)
data platforms (SQL, NoSQL dbms)	Data Science and Analytical AI (ML) Platforms
Cloud data platforms (SQL, NoSQL dbms)	ERP
App WEB Server, Emulation, , BRMS APaaS (container platforms) Integration Streaming IPaaS	CRM
IT (+cloud) Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ITSM, Service Desk	HR/ Talent Mgmt./ LMS
FinOps tools	Marketing Automation Software
Endpoint related tools	Contact Center and Multi channel engagement tools (chatbots, Virtual IVR, Video, Voice, etc....)
Network Web cloud services FW, WAF, ddos services, etc.)	E-Commerce Platforms
data content related tools (DB FW, DLP Halhana, etc.)	Web Content Management Platforms
cyber management tools (SIEM tool, incident responds, automation)	PLM Systems
Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access service edge) IDW, Access	Blockchain platforms
Cloud security protection tools (CNAPP CSPM CASB)	GIS Platforms
Other cyber tools (secure development, awareness etc.)	IOT tools and platforms
Project & Portfolio Management	RPA Platforms
Development tools, ALM, Devops for all environments (including Mobile)	Generative AI tools and platforms
Low Code tools	Agentic AI tools and platforms
Governance, Risk & Compliance	Logistics Software (WMS, transportation, etc)
Regulation Software	Financial Software (loans, mortgages, 360 client view, payments and other financial market software)
Office productivity (office calendar, mail etc.), CRM Enterprise Portals, ECM, Search, Knowledgebases tools)	Military Software (digital apps , analytics, etc)
Digital Output Management/Customer Communication Management	Retail Management Software
Employee Collaboration, Task Management & Engagement Tools	Healthcare Related Software
BI Tools	Education Digital Software

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 mgmt 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 Consulting (customer journeys, Customer 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)	GenerativeAI 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 (nuron)	Printing Outsourcing Services (pay per click)
Unified Communication Projects (IM, Video, Voice)	Regulation Projects	Business Services as a Service: B2BaaS (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	Collaboration, Task Management & Engagement Tools Implementations	Staff Augmentation (gig/eo/ol)
Blockchain projects	Knowledge Management (ECM, Portals, Search, Knowledgebases) Implementations	
IoT Projects		



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important please read

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

STKI has **signed NDAs** with the vendors (Revenues, Projects) and we tried to **Minimize opportunities for backward engineering of the data**

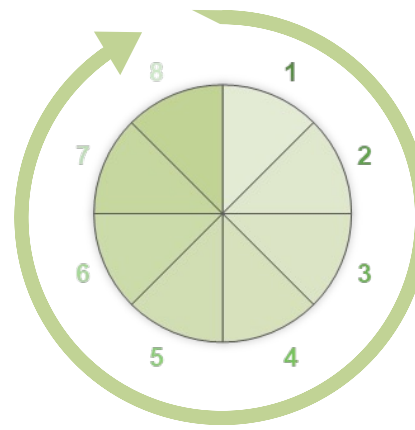


STKI Calculates market sized by revenues / sales and not deliveries or invoices

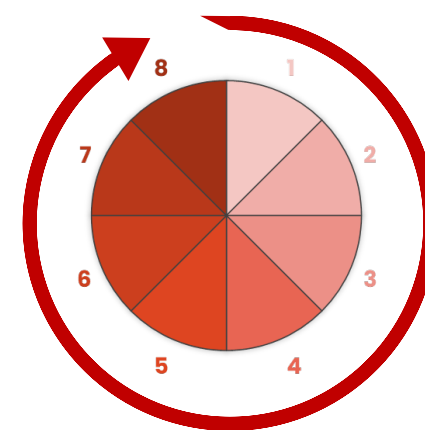
Tier One Companies



Smaller Companies



Small Boutique Companies or Departments



STKI Ranks Vendors by **REVENUE** and **CLIENT MINDSHARE**

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



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“Israeli 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**

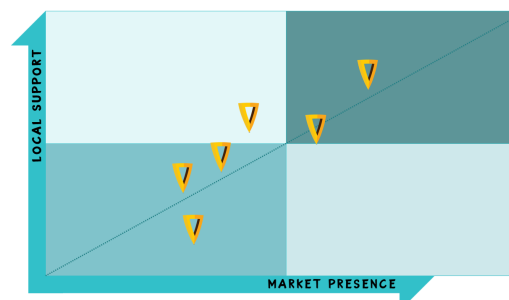
Focused on the enterprise sector (not SMB)

- ▶ **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



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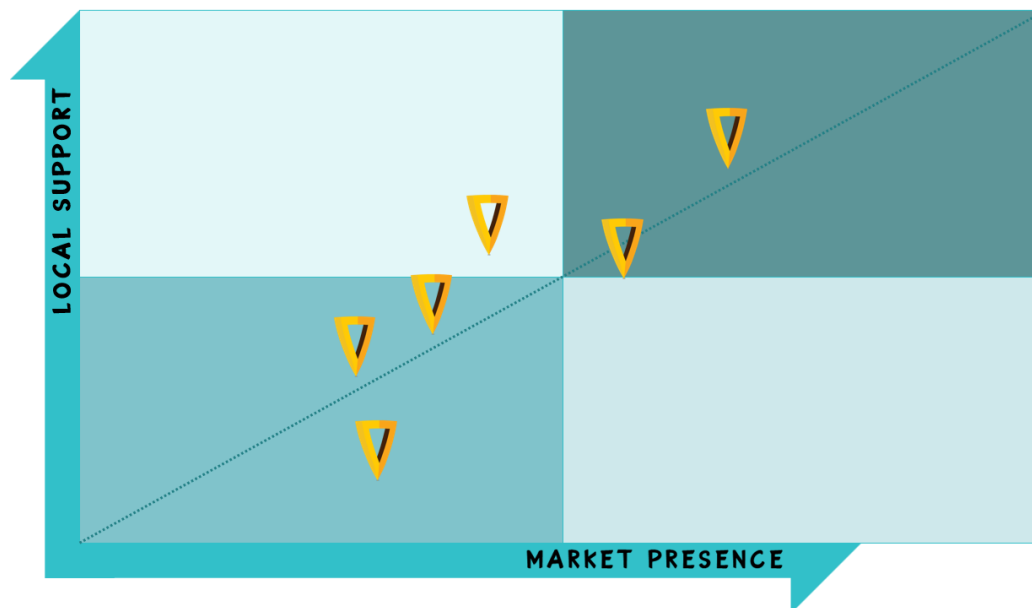
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Y axis (Local Support)

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**



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Israel

Number of companies & IT budgets by Industry



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



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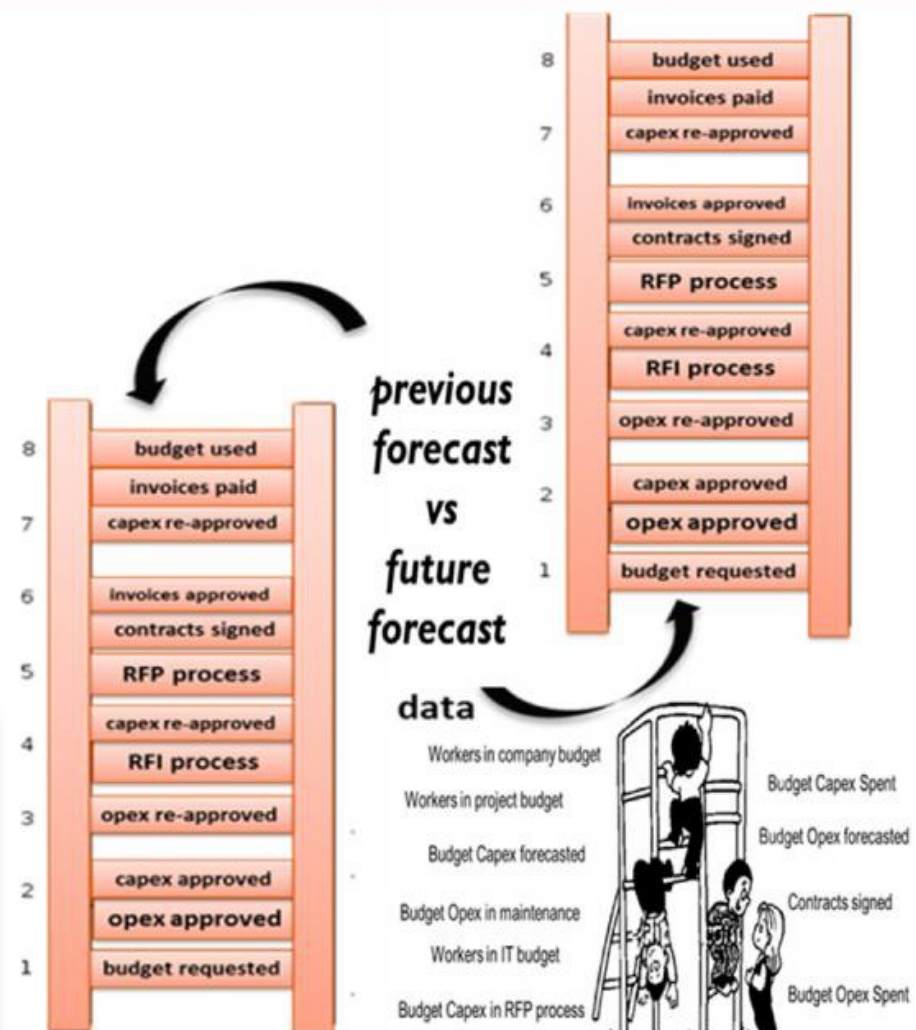


STKI's analysts interviewed over 110 CIOs & VP Techs in Israel (managing around 70-75% of IT budgets) about:

1. Approved Budgets for 2025
2. Amount used in Budgets 2022-2024
3. Projects forecasted for 2025-2027
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.



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Number of Companies in Israel 2025

2019	2020	2021	2022	2023	2024 *				
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	number of companies (paying taxes)	% of TOTAL	subtotals	
1,696	1,498	1,712	1,802	1,786	251+	1,781	0.58%	1.49%	
2,738	2,173	2,663	2,757	2,688	101-250	2,784	0.91%		
4,849	3,554	4,701	4,955	4,679	51-100	4,808	1.59%	1.59%	1.59%
38,760	30,938	38,532	40,270	39,689	10-50	40,321	13.34%	13.34%	97.80%
235,210	234,128	240,910	252,571	256,932	2 to 9	255,379	84.46%	84.46%	
283,253	272,291	288,518	302,355	305,774	TOTALS	305,073		totals	
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 5/2023	* ACCORDING TO BITUACH LEUMI 5/2025				
					(paid National Insurance per employee on 4/2025)				



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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)**

This companies have IT departments that will introduce hybrid cloud solutions

This companies (usually will have older ERP, CRM, Core systems) will migrate to cloud first solutions

SMB companies will move to "SaaS" cloud solutions



number of employees	number of companies (paying taxes)
251+	1,781
101-250	2,784
51-100	4,808
10-50	40,321
2 to 9	255,379



Number of Companies 2025 (by Industry) page 1

עסקים פעילים, לפי ענף כלכלי (1)

Industry

number of employees per company/enterprise page 1

Employers -
total

Self-
employed

Active
business
total

Industry	100+	75-100	50-74	40-49	30-39	20-29	10-19	5-9	1-4	Employers - total	Self- employed	Active business total
TOTAL	4,954	1,854	3,796	2,837	4,586	9,075	26,396	49,540	230,094	333,132	387,473	720,605
Agriculture, forestry and fishing	92	54	141	110	187	351	1,036	1,423	4,250	7,644	7,500	15,144
Manufacturing; mining and quarrying	633	218	376	282	400	710	1,767	2,568	7,813	14,767	7,864	22,631
Electricity and water supply, sewerage and waste management	26	12	26	19	34	53	120	144	514	948	1,096	2,044
Construction	171	77	161	164	320	747	3,053	7,873	33,957	46,523	34,518	81,041
Wholesale and retail trade and repair of motor vehicles	42	30	45	53	82	208	625	1,498	5,497	8,080	4,865	12,945
Wholesale trade, except motor vehicles	194	102	227	175	294	694	1,950	3,382	11,258	18,276	9,029	27,305
Retail trade, except motor vehicles	232	98	233	199	357	745	2,768	5,873	24,002	34,507	25,140	59,647
Postal and courier activities	..	..	11	6	7	20	54	152	993	1,243	2,962	4,205
Residential care and social work activities	420	98	167	123	158	357	1,037	2,335	14,488	19,183	39,891	59,074
Arts, entertainment and recreation	113	21	47	43	52	146	565	1,588	10,915	13,490	35,717	49,207
Other service activities; extraterritorial organizations and bodies	307	77	120	80	106	211	472	747	3,573	5,693	4,174	9,867
Accommodation and food service activities	264	168	455	411	632	1,116	2,763	3,436	9,439	18,684	9,600	28,284



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Number of Companies 2025 (by Industry) page 2

עסקים פעילים, לפי ענף כלכלי (2)



הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

Industry

number of employees per company/enterprise page 2

Industry	number of employees per company/enterprise page 2									Employers - total	Self-employed	Active business total
	100+	75-100	50-74	40-49	30-39	20-29	10-19	5-9	1-4			
Information and communications	415	147	313	193	305	534	1,263	1,815	8,091	13,076	14,315	27,391
Telecommunications, computer programming and consultancy and related activities, information service activities	390	141	299	182	289	503	1,167	1,649	7,071	11,691	11,404	23,095
Financial and insurance activities	82	30	51	29	68	155	540	1,329	7,798	10,082	8,716	18,798
Real estate activities	390	141	299	182	289	503	1,167	1,649	7,071	11,691	11,404	23,095
Professional, scientific and technical activities	82	30	51	29	68	155	540	1,329	7,798	10,082	8,716	18,798
Administrative and support service activities	18	14	24	15	34	81	343	862	9,169	10,560	33,802	44,362
Local, public and defence administration and social security	221	111	277	190	385	814	2,950	6,323	42,242	53,513	87,574	141,087
Education	411	126	208	145	215	448	1,041	1,850	8,242	12,686	13,733	26,419
Human health activities	451	159	265	207	304	524	1,175	1,715	5,913	10,713	15,453	26,166



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

							forecasted				
industry	change from 2021	Budgets 2022	change from 2022	Budgets 2023	change from 2023	Budgets 2024	change from 2024	Budgets 2025	change from 2025	Budgets 2026	industry
government	15.89%	\$1,750	11.43%	\$1,950	5.13%	\$2,050	19.51%	\$2,450	10.20%	\$2,700	government
security	17.24%	\$680	10.29%	\$750	26.67%	\$950	21.05%	\$1,150	8.70%	\$1,250	security
education	14.63%	\$470	-4.26%	\$450	20.00%	\$540	32.41%	\$715	9.09%	\$780	education
health	6.67%	\$480	-4.17%	\$460	-2.17%	\$450	7.78%	\$485	7.22%	\$520	health
utilities	4.00%	\$260	-19.23%	\$210	-4.76%	\$200	3.50%	\$207	2.42%	\$212	utilities
transport	22.22%	\$550	-3.64%	\$530	-3.77%	\$510	-3.92%	\$490	-1.02%	\$485	transport
banks	6.52%	\$980	-7.14%	\$910	-3.30%	\$880	-3.41%	\$850	1.18%	\$860	banks
insurance	7.78%	\$485	-7.22%	\$450	-3.33%	\$435	-2.30%	\$425	-2.35%	\$415	insurance
fin other	13.73%	\$580	-3.45%	\$560	-5.36%	\$530	9.43%	\$580	0.00%	\$580	fin other
manuf	-2.22%	\$880	-7.39%	\$815	-2.45%	\$795	1.89%	\$810	-2.47%	\$790	manuf
retail	3.39%	\$305	-1.64%	\$300	6.67%	\$320	7.81%	\$345	-4.35%	\$330	retail
high tech	9.09%	\$1,800	-8.33%	\$1,650	3.64%	\$1,710	2.34%	\$1,750	3.43%	\$1,810	high tech
IT local	1.11%	\$182	-5.49%	\$172	-6.98%	\$160	-1.25%	\$158	-11.39%	\$140	IT local
telecomm	-6.52%	\$215	-6.98%	\$200	-7.50%	\$185	-8.11%	\$170	-5.88%	\$160	telecomm
media	4.00%	\$260	-9.62%	\$235	-8.51%	\$215	-9.30%	\$195	-7.69%	\$180	media
SMB/SME	20.00%	\$480	-6.25%	\$450	-4.44%	\$430	11.63%	\$480	6.25%	\$510	SMB/SME
in M USD	9.77%	\$10,357	-2.56%	\$10,092	2.66%	\$10,360	8.69%	\$11,260	4.10%	\$11,722	in M USD



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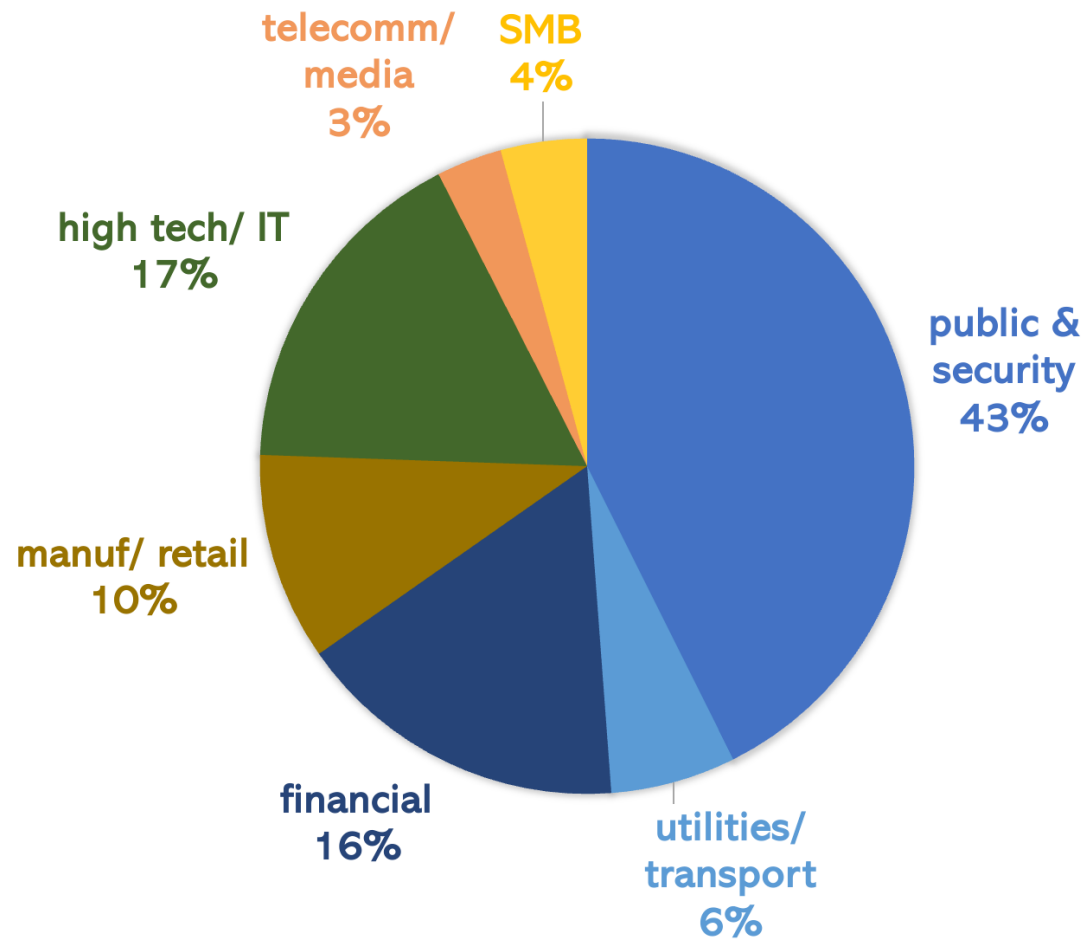
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IT Budgets 2025 per industry



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Internal Budgets Variance

(industry budgets – budget spent in the IT market)
can be explained by economic changes (corona, war,
etc.) and internal capex/opex procurement, project
and sourcing priorities

	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	-2.56%	\$10,092	2.66%	\$10,360	8.69%	\$11,260
IT market totals	\$6,698	7.97%	\$7,232	4.73%	\$7,575	9.97%	\$8,329	4.17%	\$8,677	1.20%	\$8,781	5.60%	9,273	4.08%	9,651
internal budgets difference	\$1,229	-9.83%	\$1,108	-12.39%	\$971	13.93%	\$1,106	51.96%	\$1,680	-21.97%	\$1,311	-17.06%	\$1,087	47.96%	\$1,609



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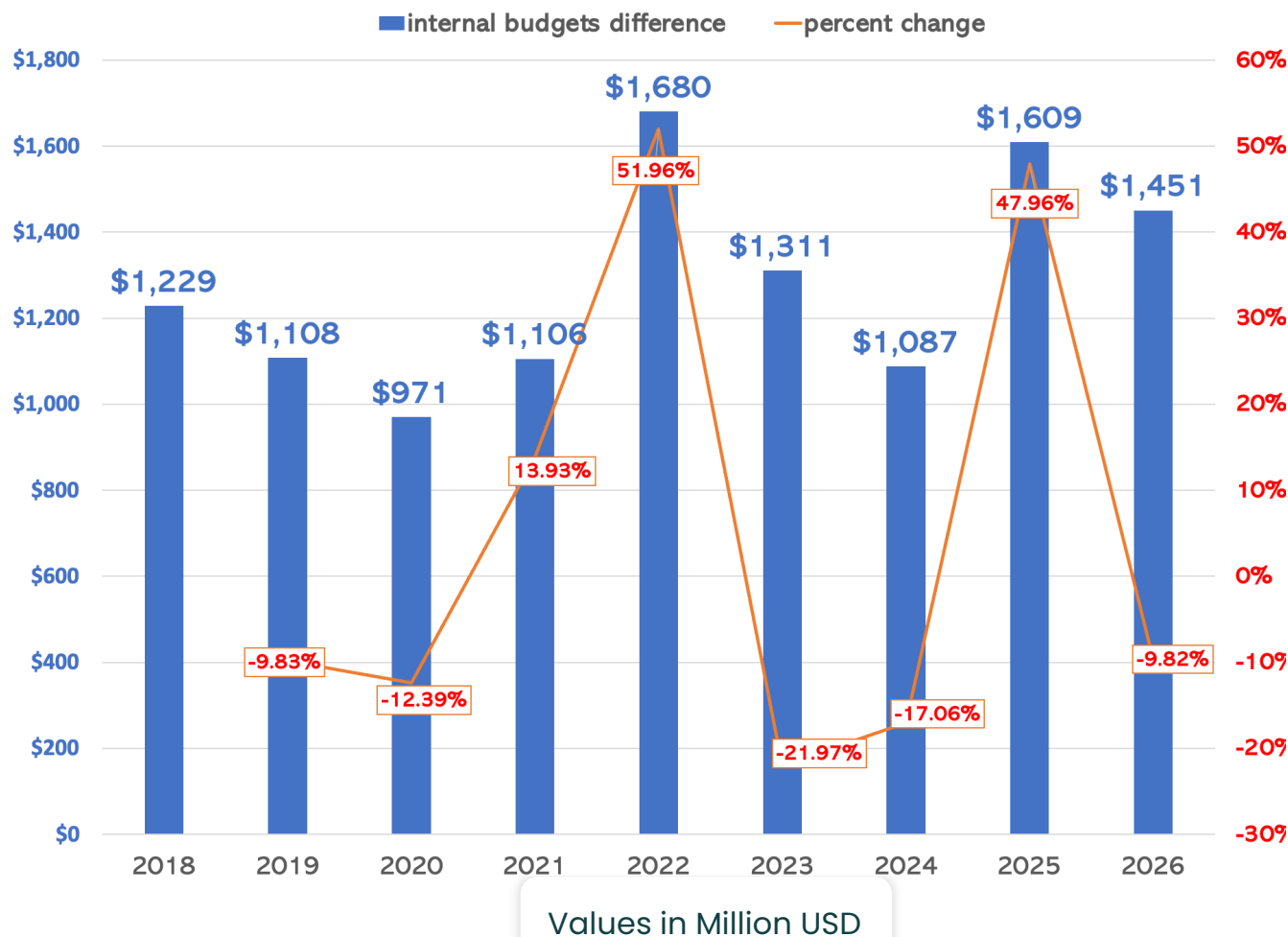
Values in Million USD



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IT Budget – Budget spent on outside vendors = internal spent budget



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Analysis of forecasted budgets 2025 & 2026



industry	Budgets 2025	% total	industry	Market size	% total
government	\$2,450	25%	public & security	\$4,800	48.12%
security	\$1,150	12%			
education	\$715	7%			
health	\$485	5%			
utilities	\$207	2%	utilities/transport	\$697	6.99%
transport	\$490	5%			
banks	\$850	9%	financial	\$1,855	18.60%
insurance	\$425	4%			
fin other	\$580	6%			
manuf	\$810	8%	manuf/retail	\$1,155	11.58%
retail	\$345	3%			
high tech	\$1,750	18%	high tech/ IT	\$1,908	19.13%
IT local vendors	\$158	2%			
telecomm	\$170	2%	telecomm/media	\$365	3.66%
media	\$195	2%			
SMB/SME	\$480	5%	SMB	\$480	4.81%
in M USD	\$11,260	113%	in M USD	\$11,260	113%

industry	Budgets 2026	% total	industry	Market size	% total
government	\$2,700	25%	public & security	\$5,250	52.07%
security	\$1,250	12%			
education	\$780	7%			
health	\$520	5%			
utilities	\$212	2%	utilities/transport	\$697	6.44%
transport	\$485	4%			
banks	\$860	8%	financial	\$1,855	17.14%
insurance	\$415	4%			
fin other	\$580	5%			
manuf	\$790	7%	manuf/retail	\$1,120	10.35%
retail	\$330	3%			
high tech	\$1,810	17%	high tech/ IT	\$1,950	18.02%
IT local vendors	\$140	1%			
telecomm	\$160	1%	telecomm/media	\$340	3.14%
media	\$180	2%			
SMB/SME	\$480	4%	SMB	\$480	4.43%
in M USD	\$11,692	108%	in M USD	\$11,692	112%



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STKI IT Market Health Index

Financial Budgets / Public Budgets

Banks
Insurance
Fin Other

Government
Security
Education
Health

STKI IT Market Health Index

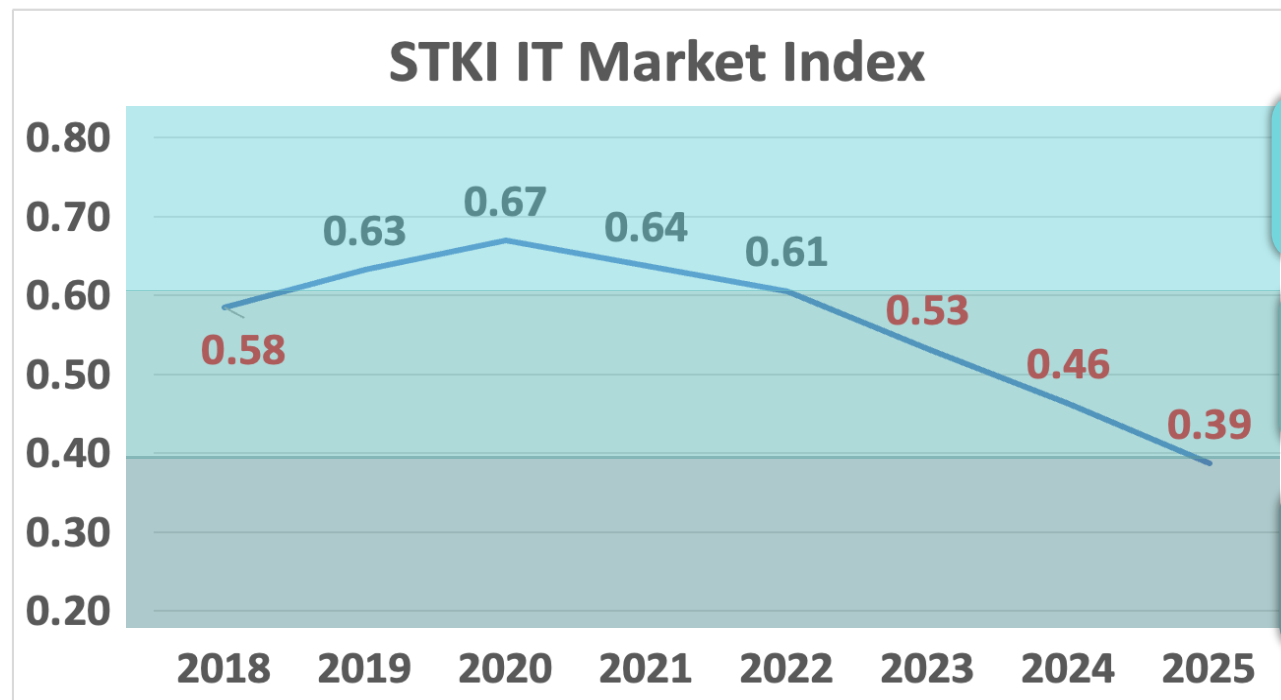
.95 to over 1 excellent

.75 to .95 very good

.60. to .75. good

.45 to .60 bad

Under .45. market transformation



GOOD



BAD

	2018	2019	2020	2021	2022	2023	2024	2025
STKI IT Market Index	0.58	0.63	0.67	0.64	0.61	0.53	0.46	0.39
% change		8.21%	5.88%	-4.84%	-5.06%	-12.09%	-13.06%	-16.42%



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OPPORTUNITIES according to IT Budgets



industry	Budgets 2025
government	\$2,450
high tech	\$1,750
security	\$1,150
banks	\$850
manuf	\$810
education	\$715
fin other	\$580
transport	\$490
health	\$485
SMB/SME	\$480
insurance	\$425
retail	\$345
utilities	\$207
media	\$195
telecomm	\$170
IT local vendors	\$158



Values in Million USD

industry	Budgets 2026
government	\$2,700
high tech	\$1,810
security	\$1,250
banks	\$860
manuf	\$790
education	\$780
fin other	\$580
health	\$520
transport	\$485
SMB/SME	\$480
insurance	\$415
retail	\$330
utilities	\$212
media	\$180
telecomm	\$160
IT local vendors	\$140



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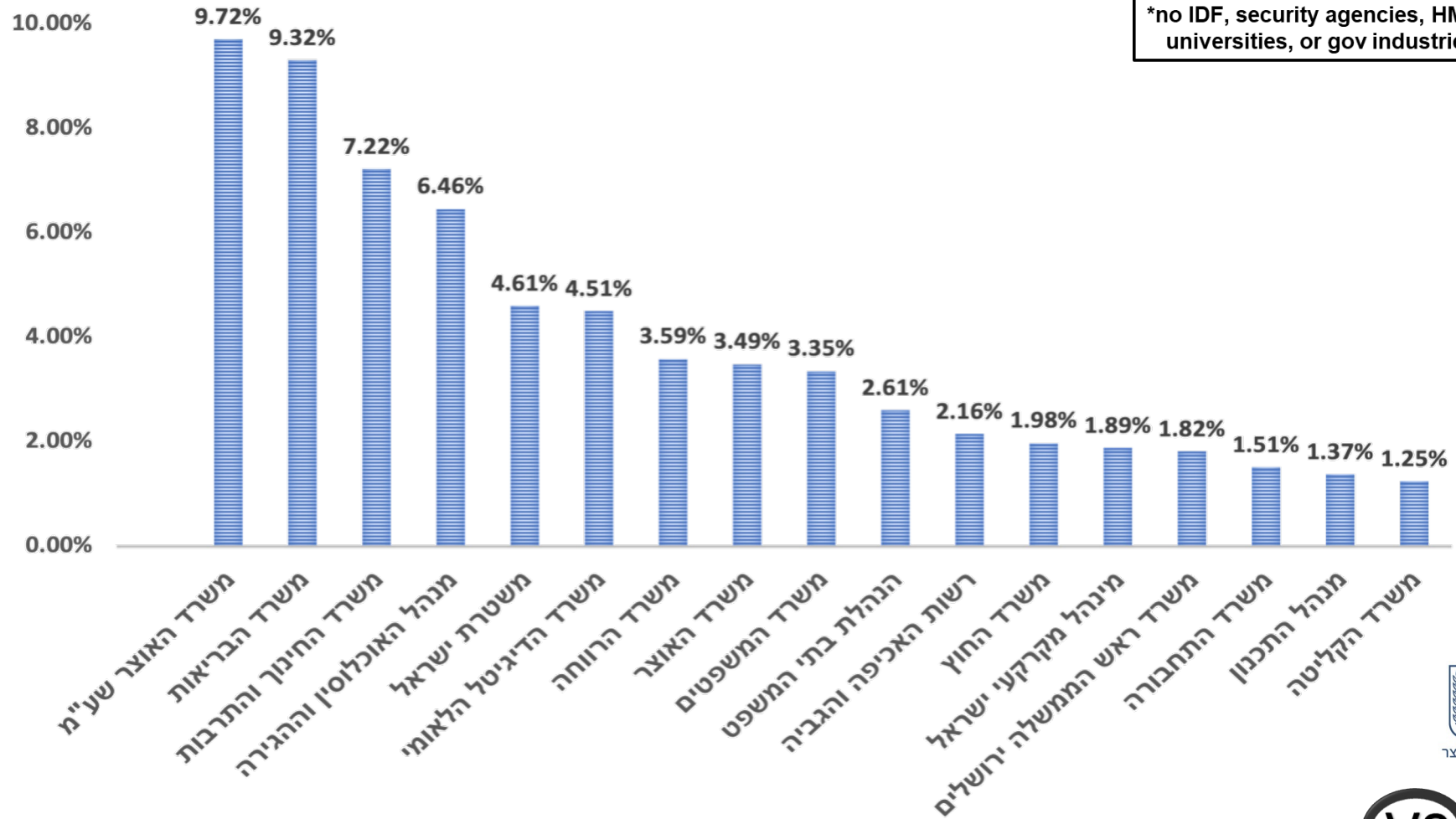
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Expected Slice of Government IT Budgets 2025*

percent of government it budgets



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



משרד האוצר



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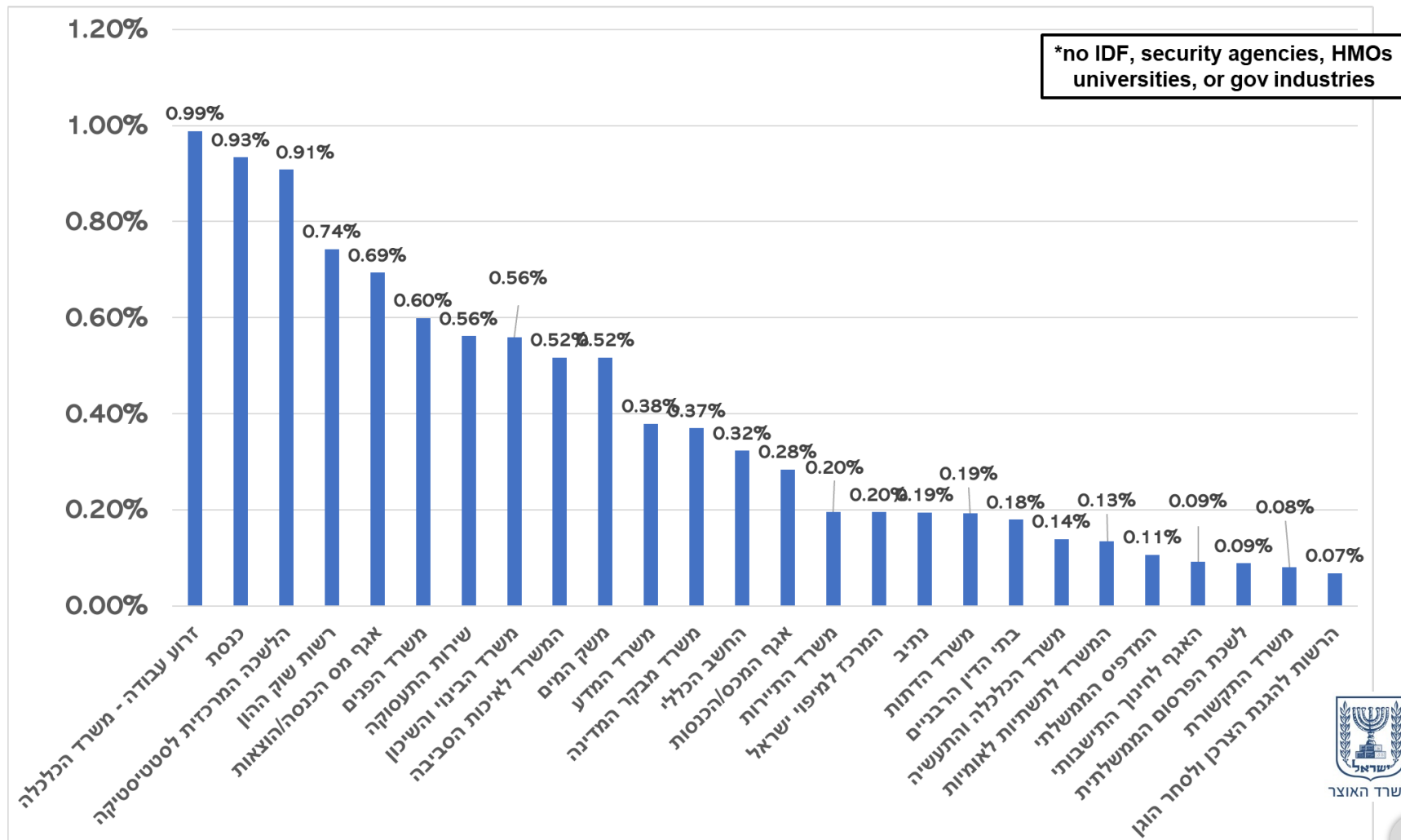


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Expected Slice (2) of Government IT Budgets 2025*

percent of government it budgets



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Israel

IT Market Forecasts (statistics)



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



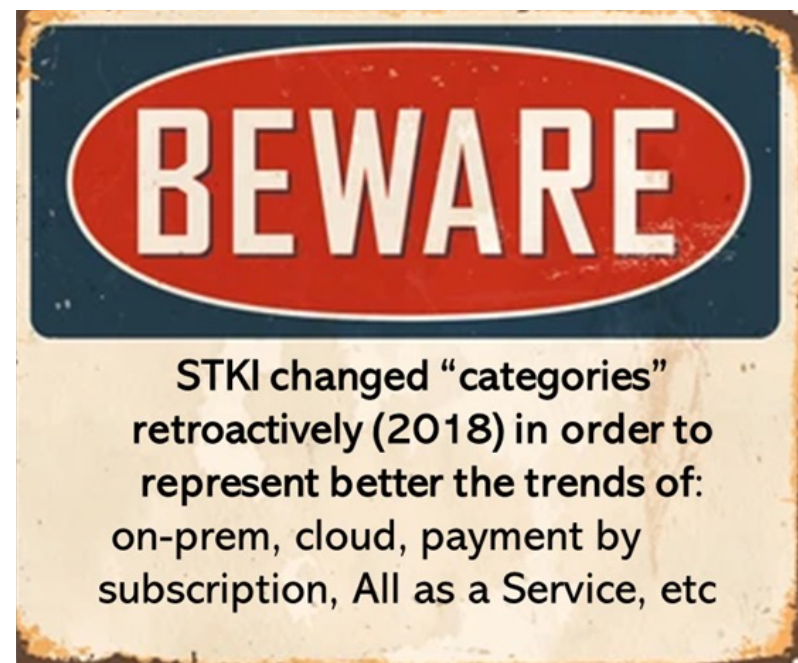
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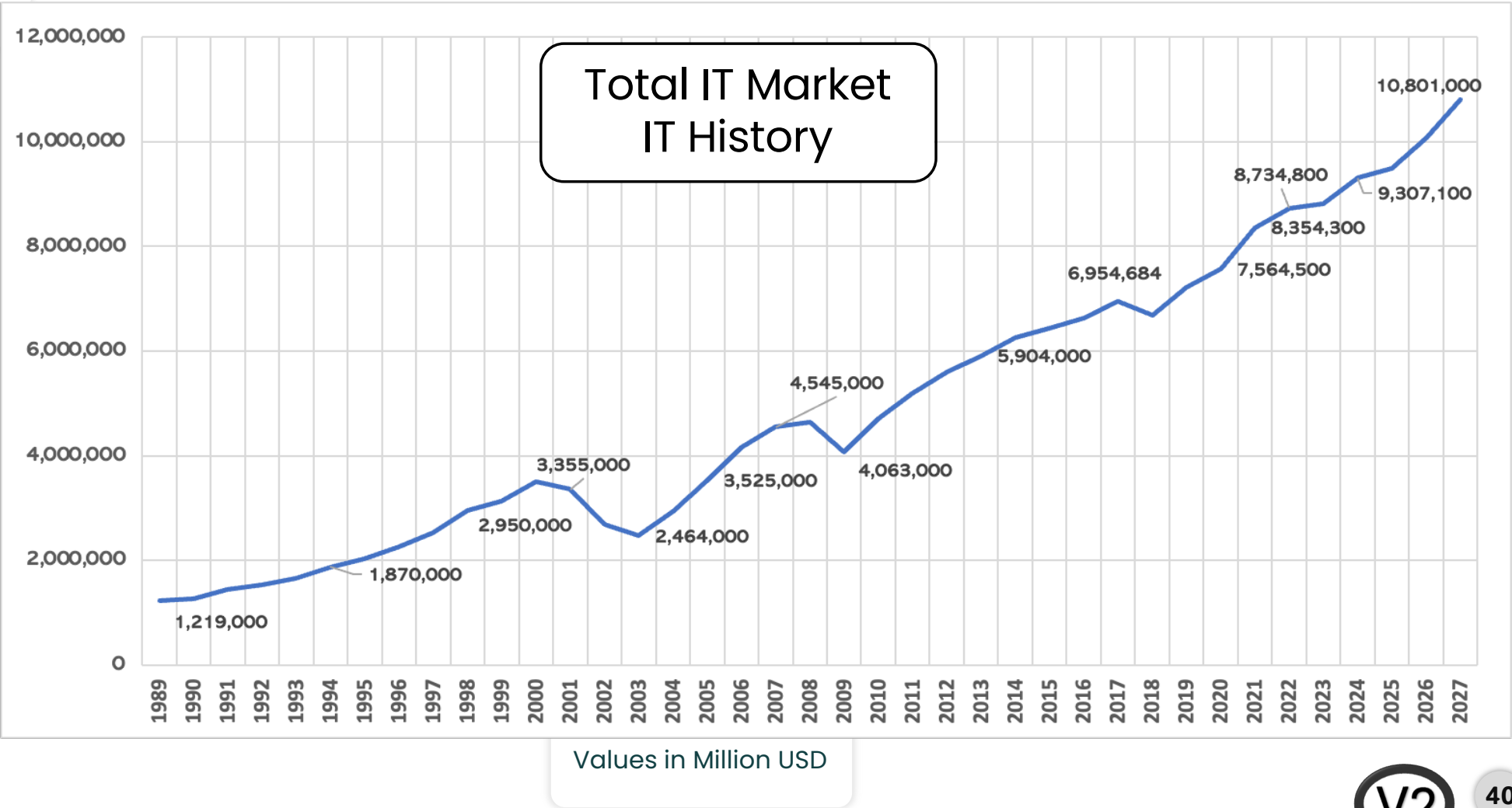
Values in Million USD

V2

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IT Market 1989-2027



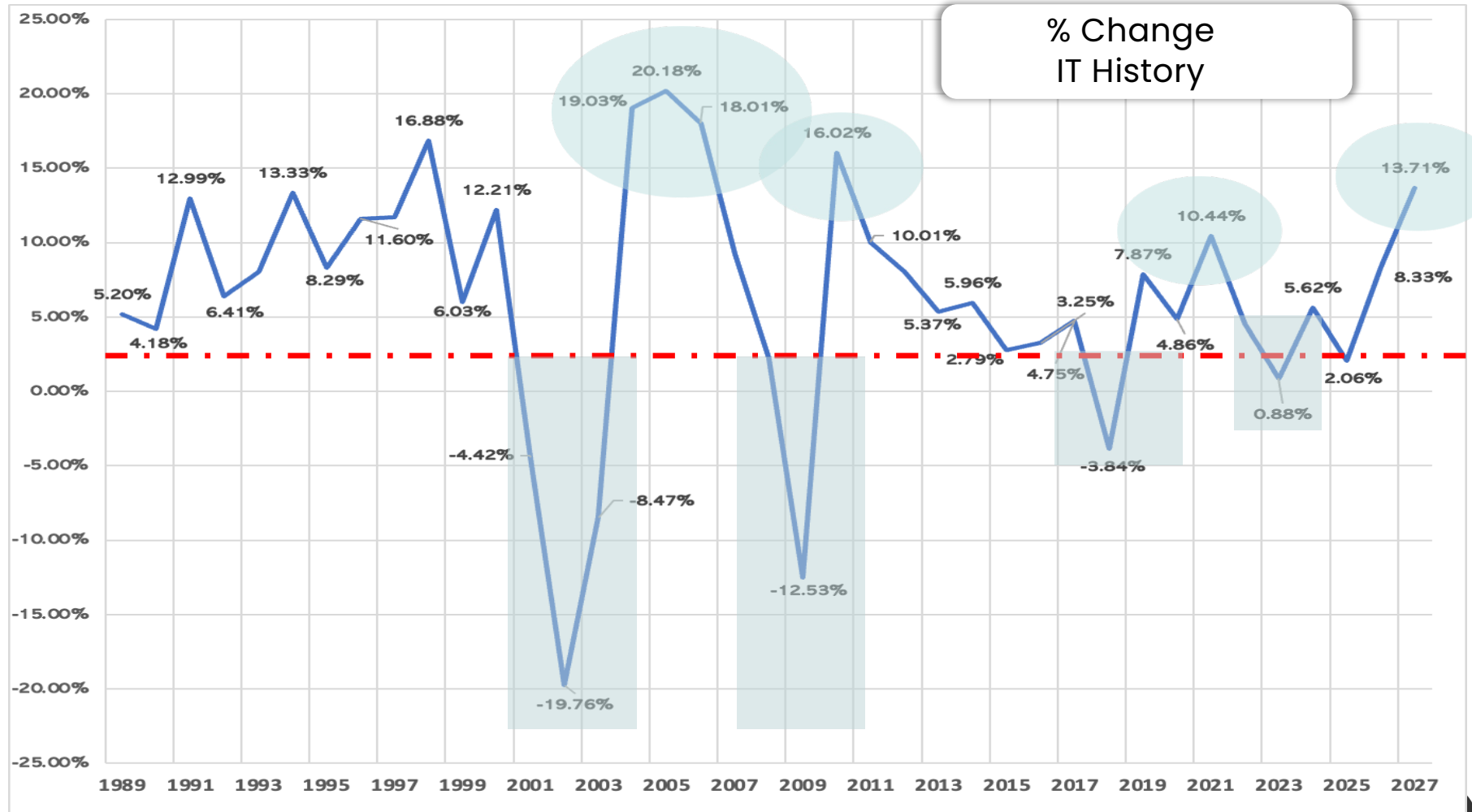
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IT % Change of Market 1989-2027



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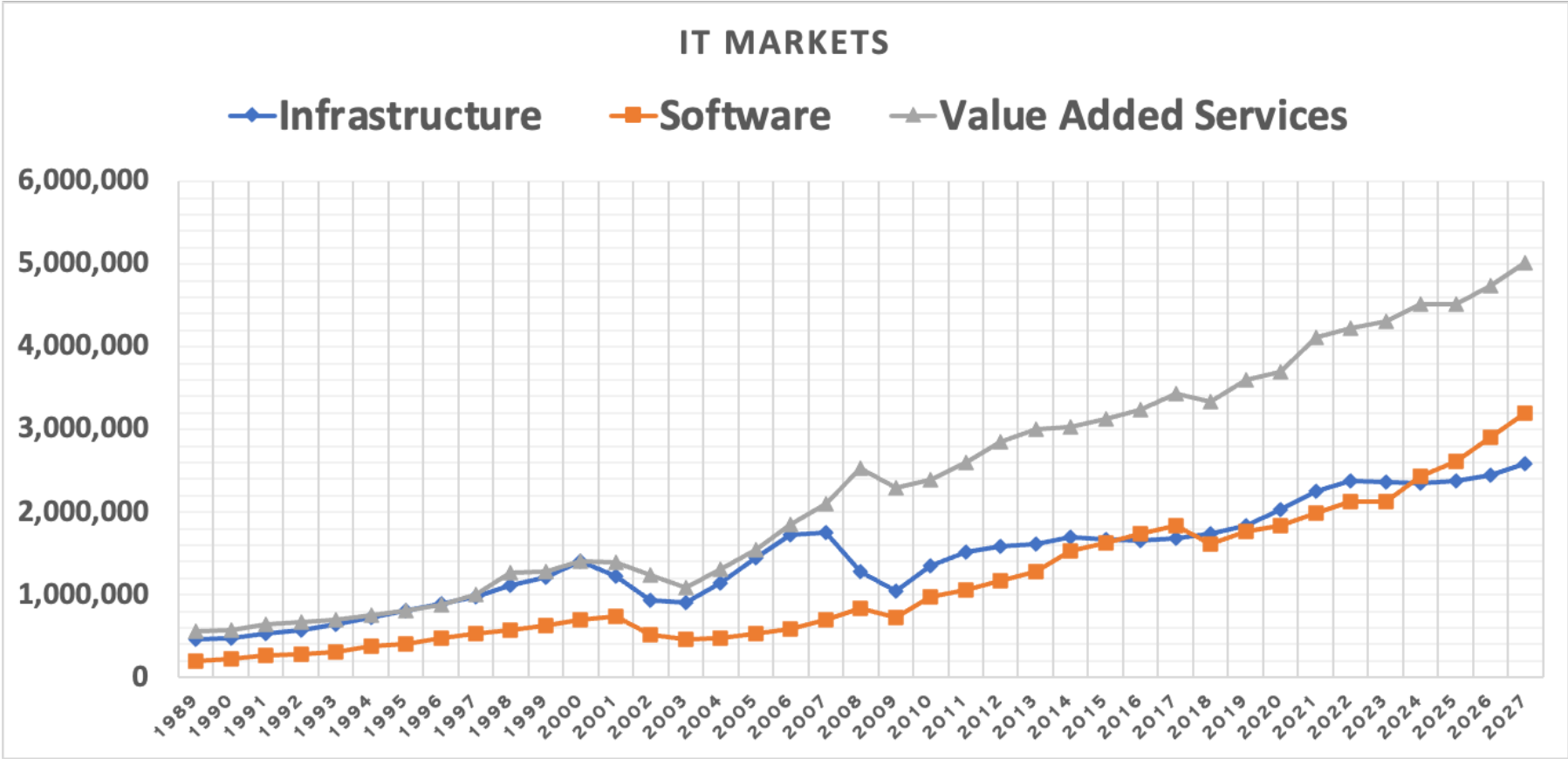
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Israeli IT Markets 1989-2027



Values in Million USD



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Israeli IT Market 2018-2025

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Infrastructure	1,736,200	1,841,000	2,030,000	2,256,000	2,372,000	2,365,000	2,357,000	2,380,000	2,447,000	2,589,000
Software	1,608,500	1,769,700	1,836,000	1,983,300	2,132,800	2,134,500	2,427,600	2,609,100	2,900,100	3,192,000
Value Added Services	3,342,800	3,603,000	3,698,500	4,115,000	4,230,000	4,312,500	4,522,500	4,509,999	4,735,500	5,020,000
TOTAL MARKET	6,687,500	7,213,700	7,564,500	8,354,300	8,734,800	8,812,000	9,307,100	9,499,099	10,082,600	10,801,000
growth		7.87%	4.86%	10.44%	4.55%	0.88%	5.62%	2.06%	8.33%	13.71%

Values in Million USD



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Infrastructure Product Markets 2025

"vendor rankings"



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



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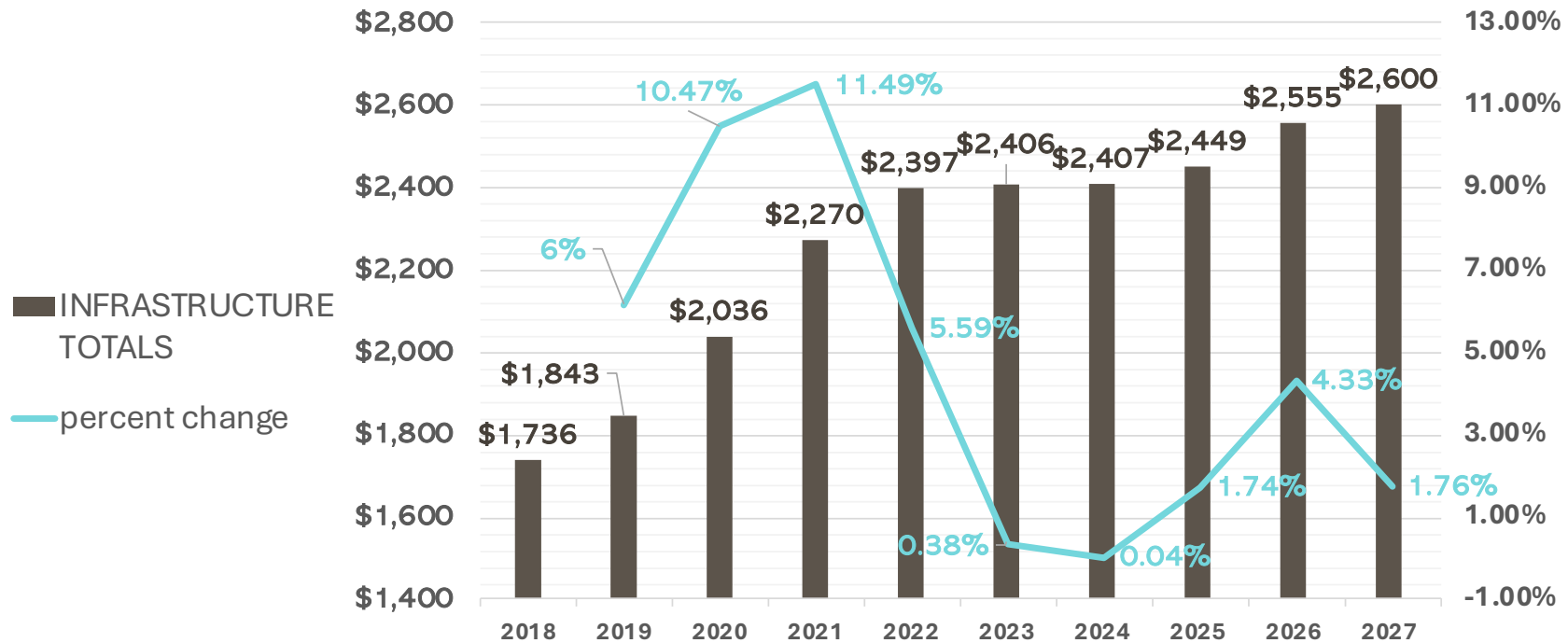
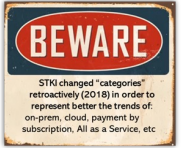


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Infrastructure

Infrastructure Market 2018-2027



2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
\$1,736.15	\$1,843.00	\$2,036.00	\$2,270.00	\$2,397.00	\$2,406.00	\$2,407.00	\$2,449.00	\$2,555.00	\$2,600.00
	6%	10.47%	11.49%	5.59%	0.38%	0.04%	1.74%	4.33%	1.76%

Values in Million USD



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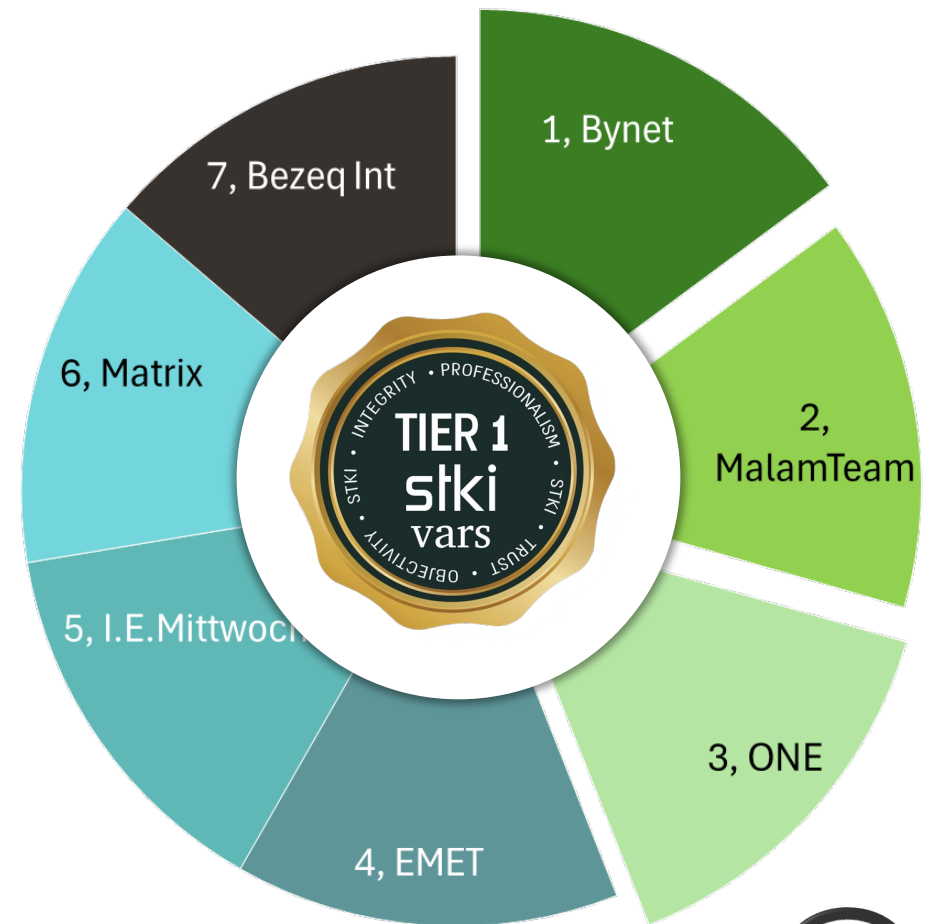
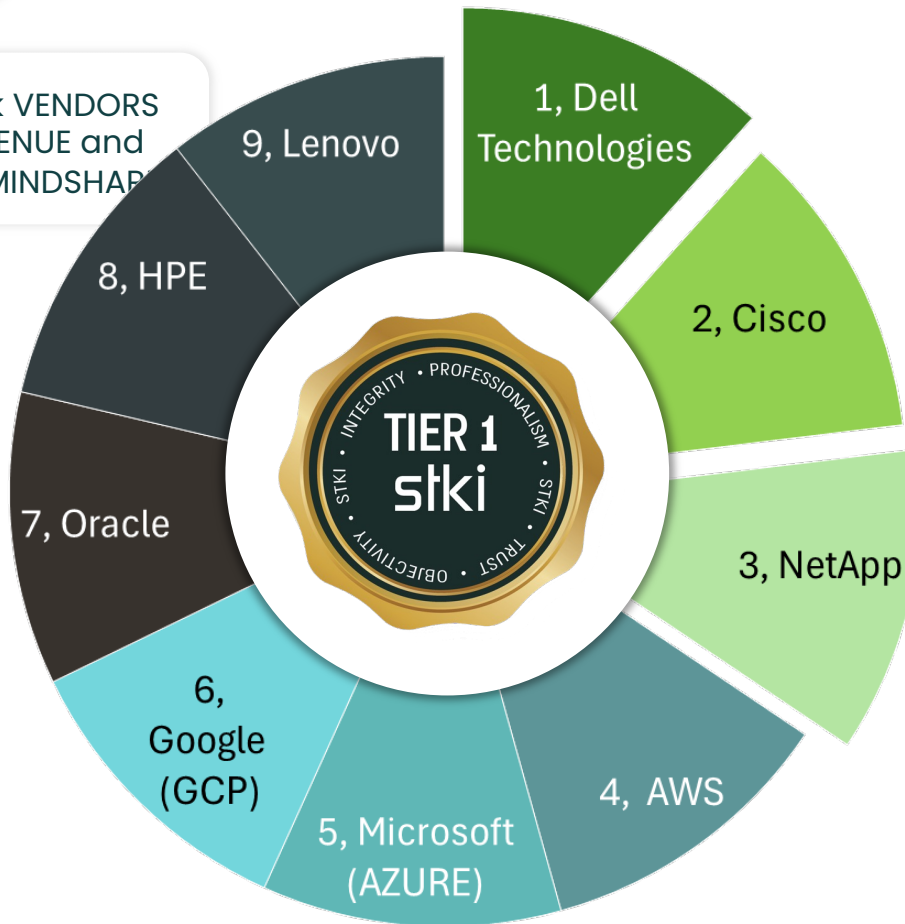
Infrastructure

TOP VENDORS: Infrastructure

Infrastructure Suppliers

Infrastructure VARs

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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Infrastructure

Infrastructure Categories (pages)

Servers & Appliances

Page:

183

Client PCs

Page:

195

Enterprise Storage

Page:

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Networking, Call Centers
Security Appliances

Page:

207

Data Center Equipment
Colocation & Self Service

Page:

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General Cloud
Consumption

Page:

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Servers & Appliances Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
servers X86	290	10.34%	320	1.56%	325	-2.15%	318	2.20%	325	4.62%	340	-5.88%	320	-1.56%	315
Legacy (non-x86)	26	19.23%	31	3.23%	32	-18.75%	26	-7.69%	24	-4.17%	23	-4.35%	22	-4.55%	21
Data Appliances and AI computing	19	31.58%	25	40.00%	35	42.86%	50	20.00%	60	20.00%	72	18.06%	85	-100.00%	
HCI appliances	56	25.00%	70	7.14%	75	4.00%	78	2.56%	80	6.25%	85	7.06%	91	10.99%	101
TOTALS	391	14.07%	446	4.71%	467	1.07%	472	3.60%	489	6.34%	520	-0.38%	518	-15.64%	437



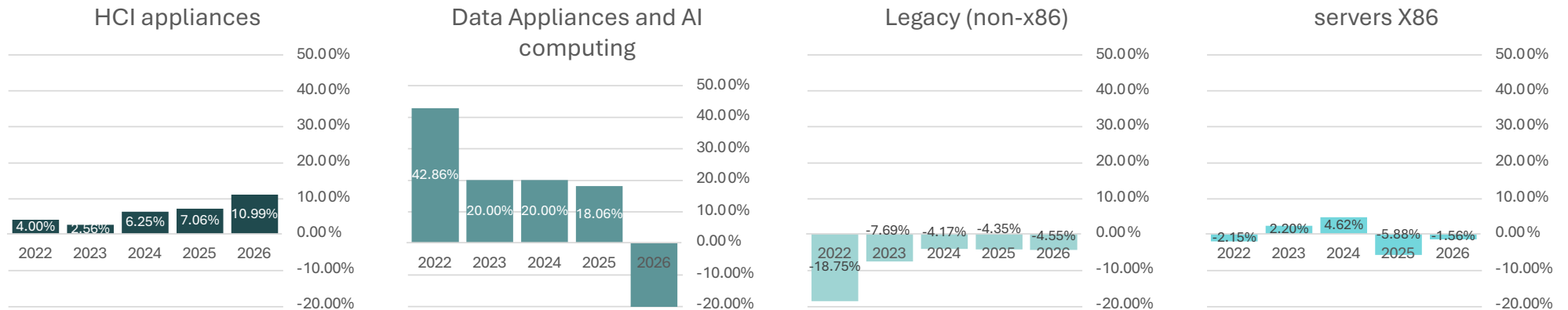
Values in Million USD





Infrastructure

Servers & Appliances Market 2022-2026



Values in Million USD



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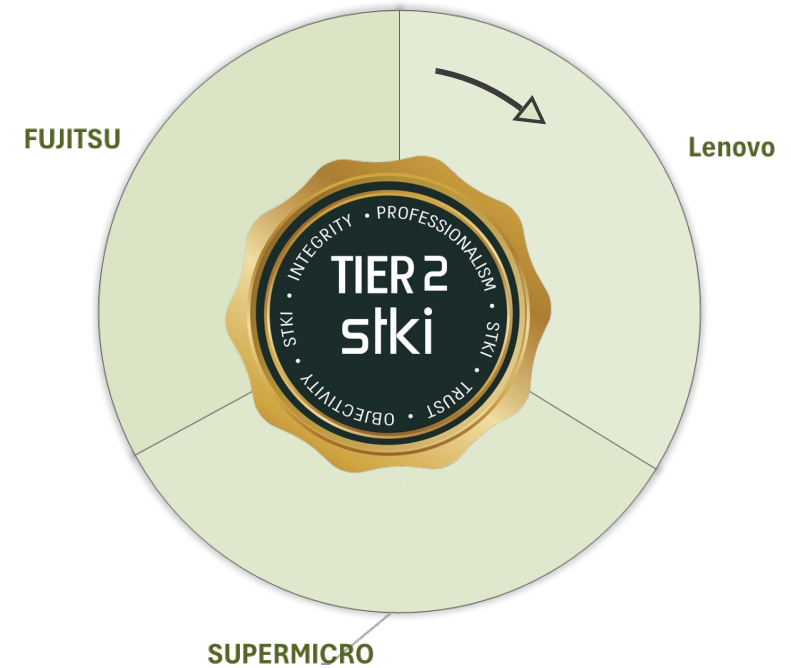


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Infrastructure

Servers X86



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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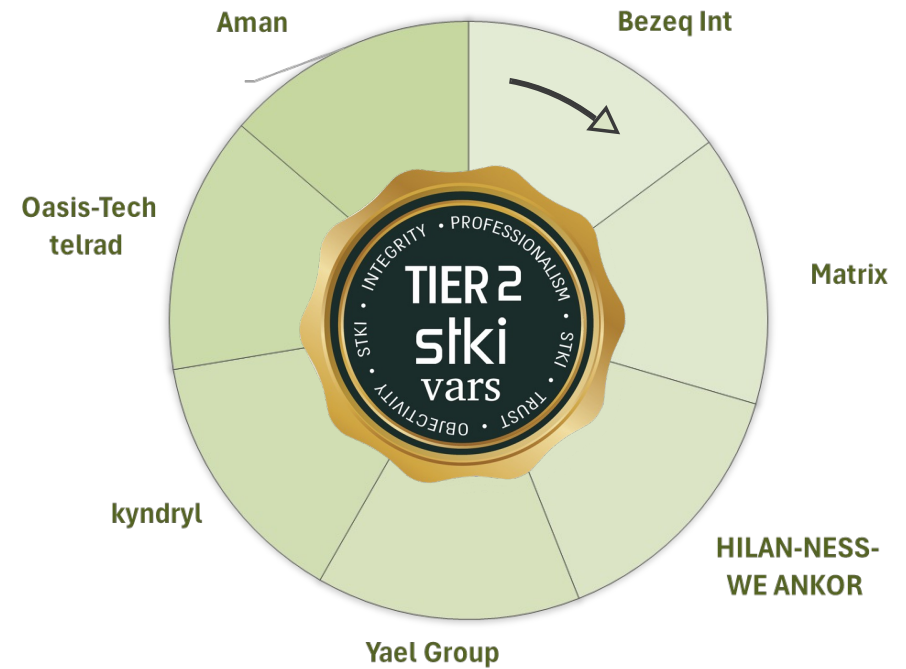
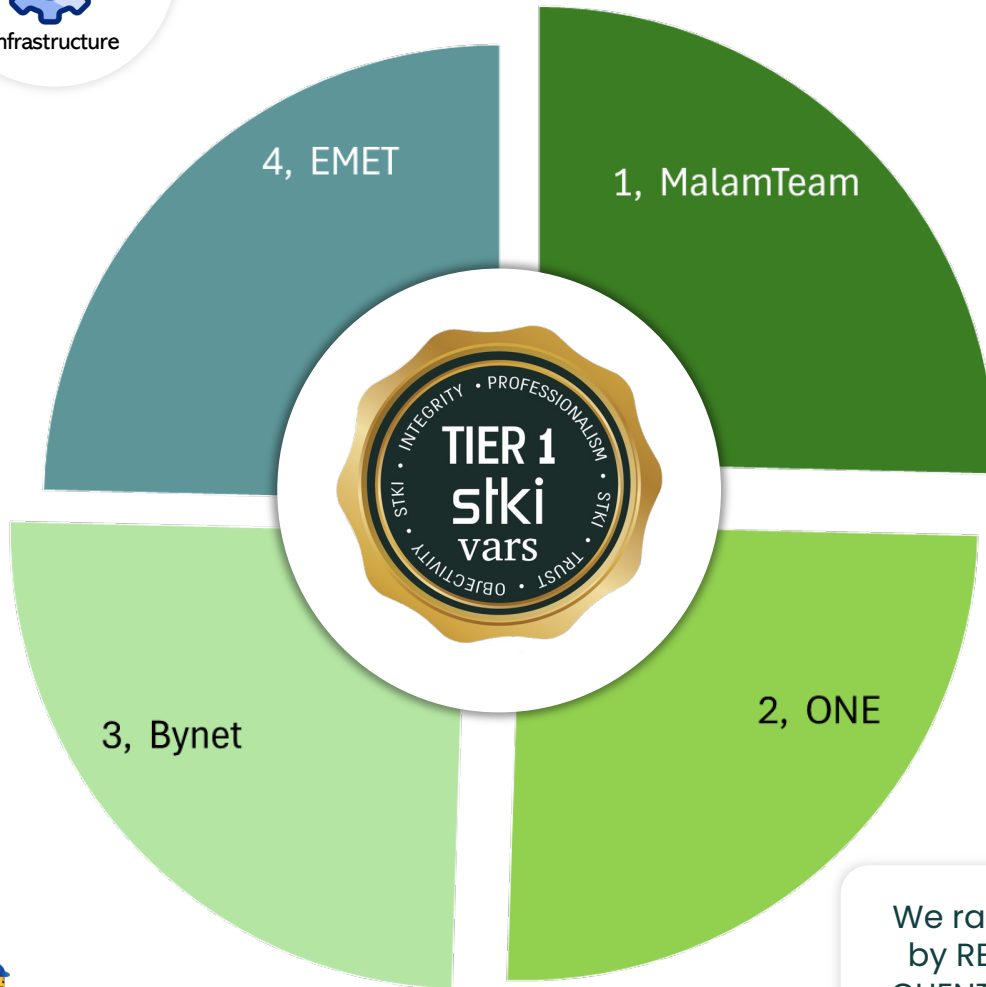
V2

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Servers X86 VARs



Infrastructure



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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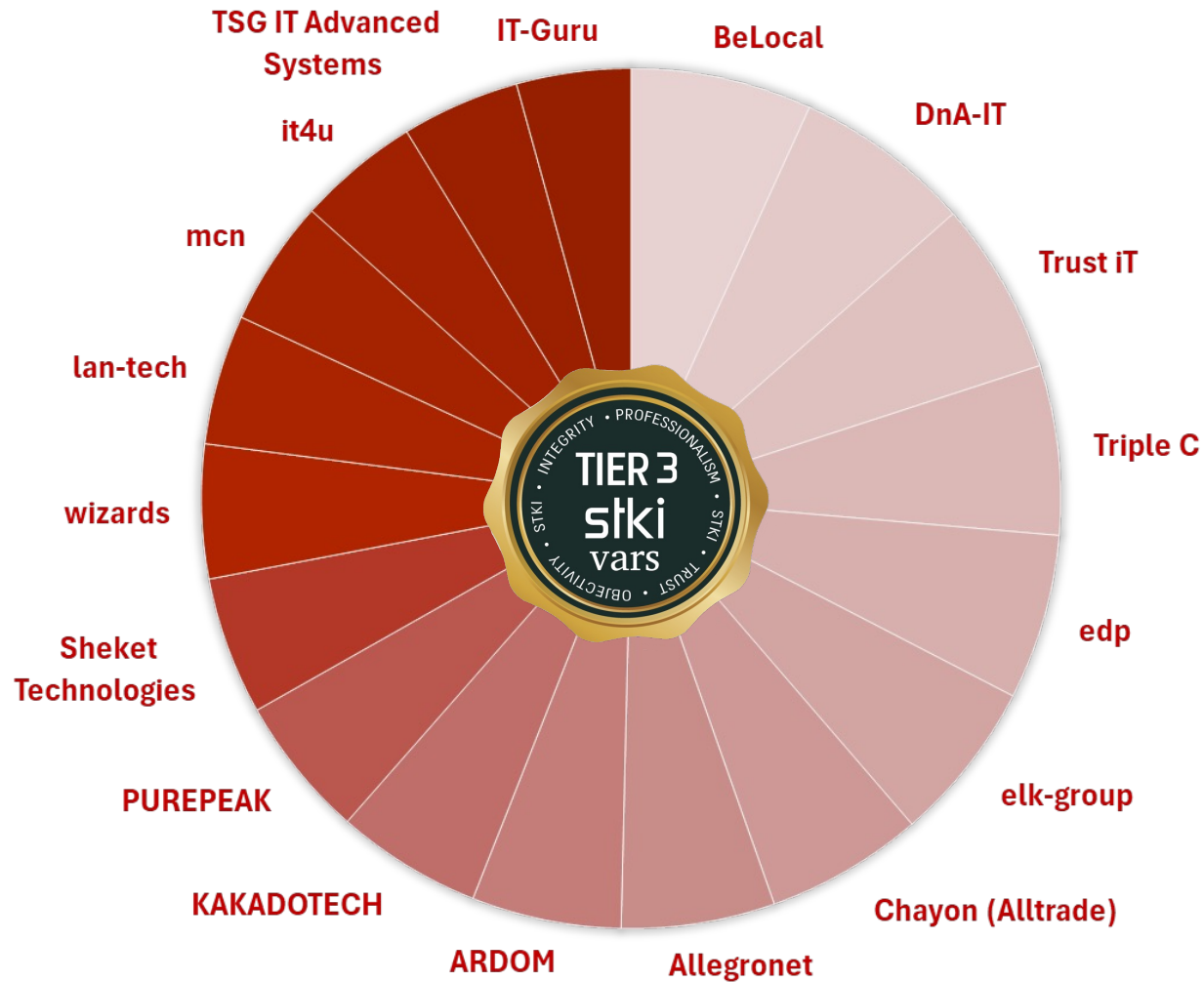
51

Servers X86 VARs



Infrastructure

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CLIENT MINDSHARE



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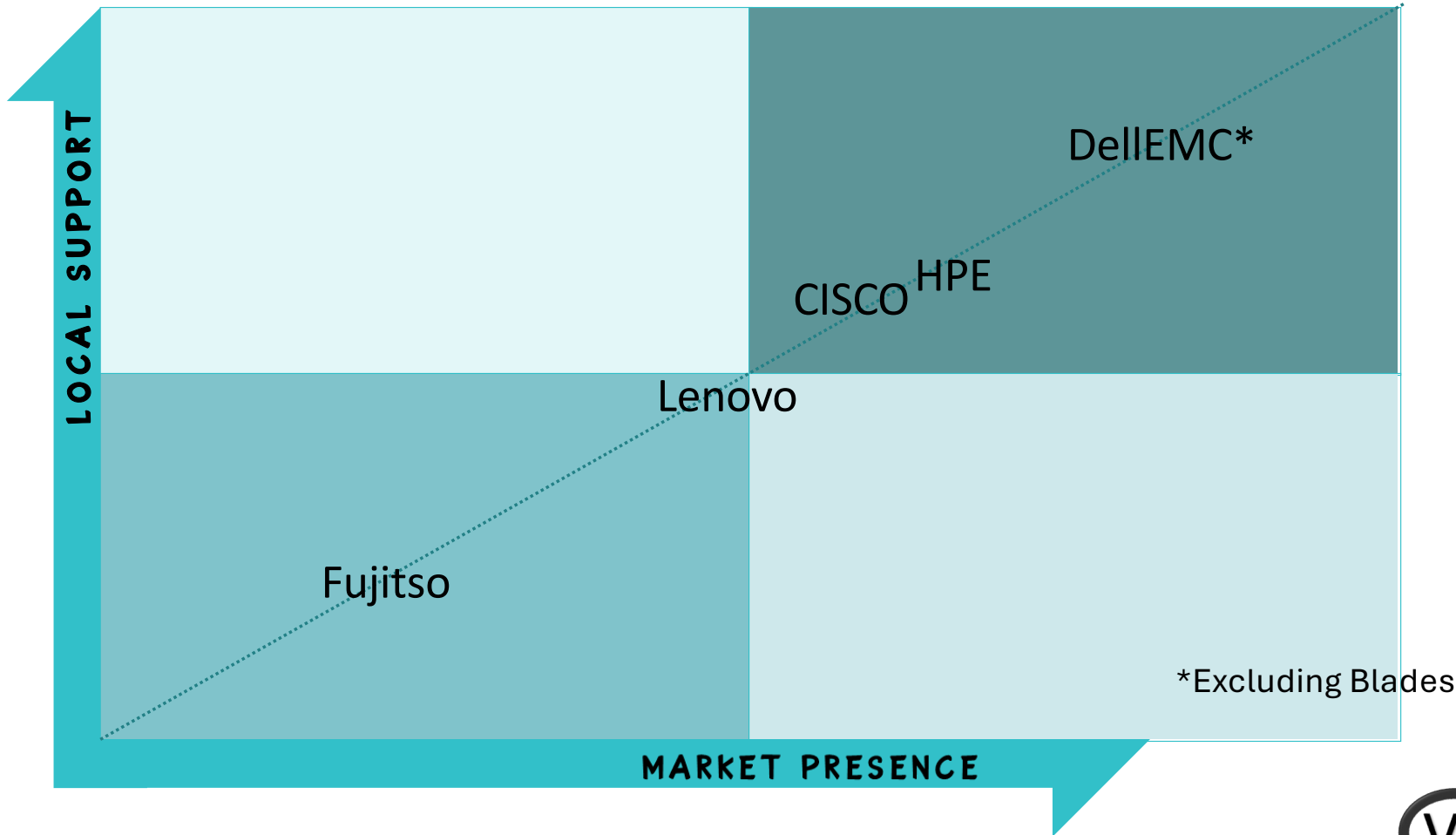
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General Purpose Intel Server - market presence 2025

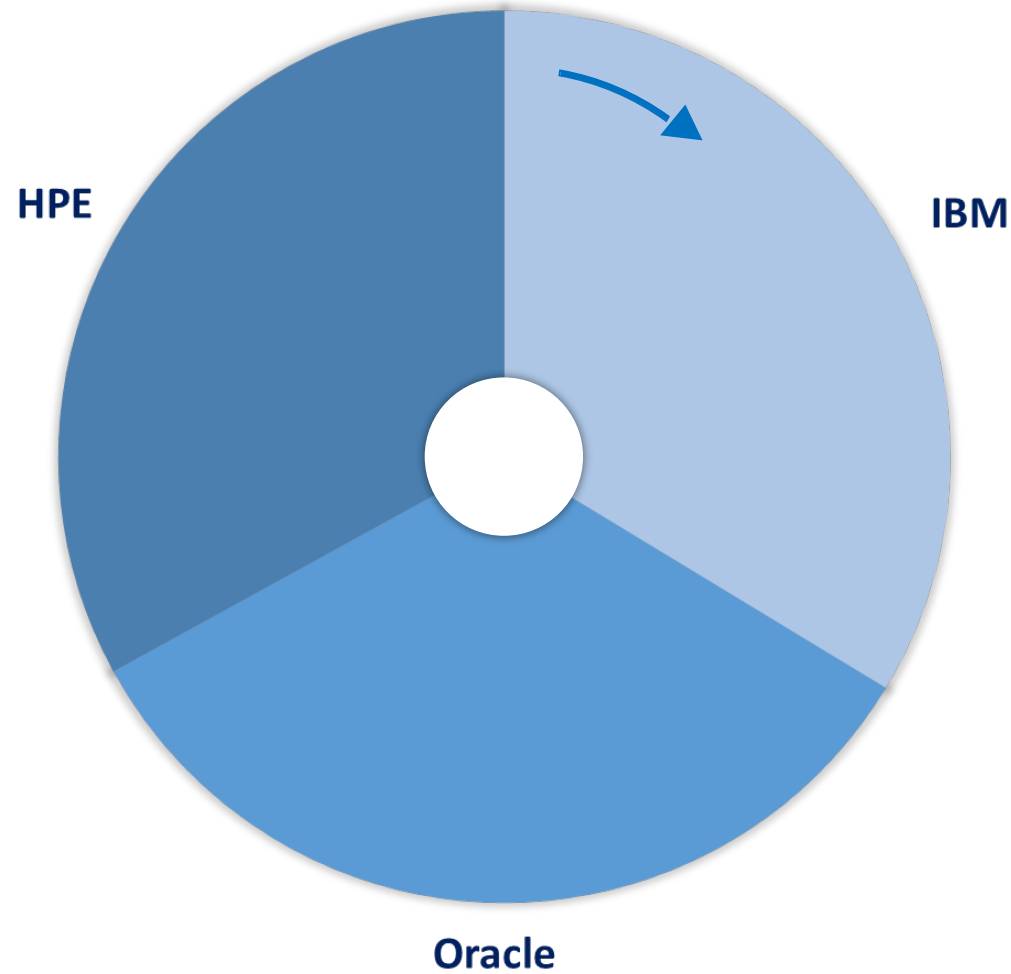




Infrastructure

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

Legacy (non-x86) Computer Systems



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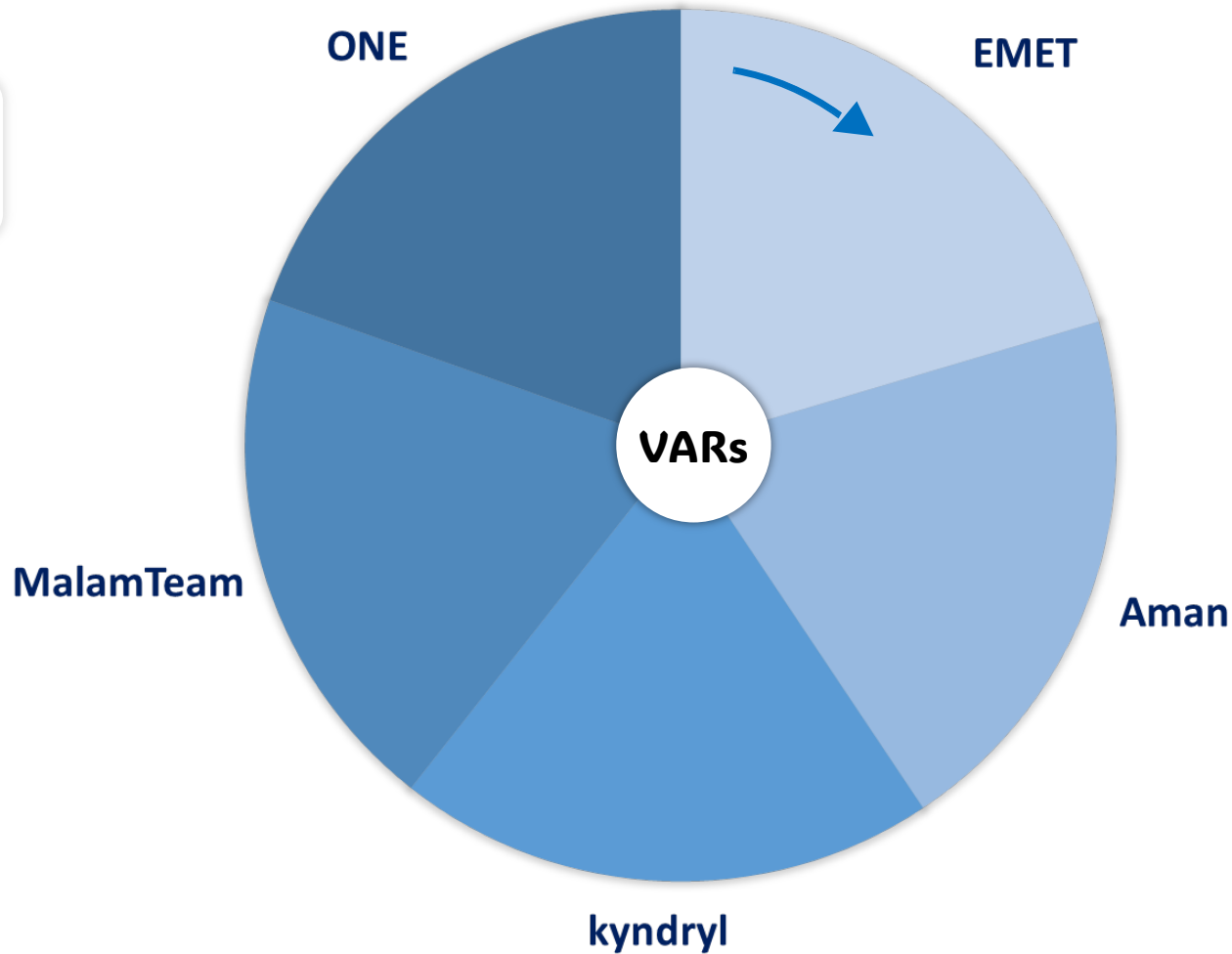
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Infrastructure

We rank VENDORS
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CLIENT MINDSHARE

Legacy (non-x86) Computer Systems



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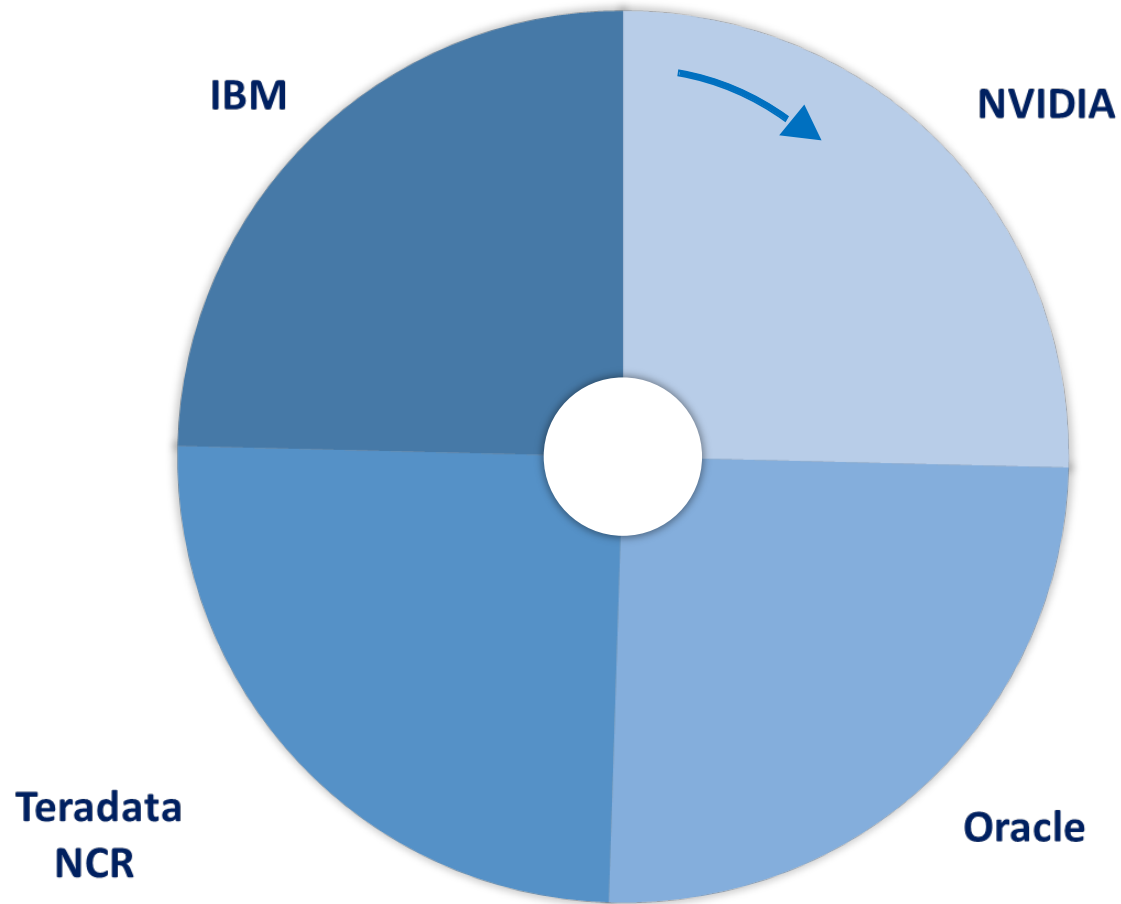
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Data Appliances



Infrastructure

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CLIENT MINDSHARE



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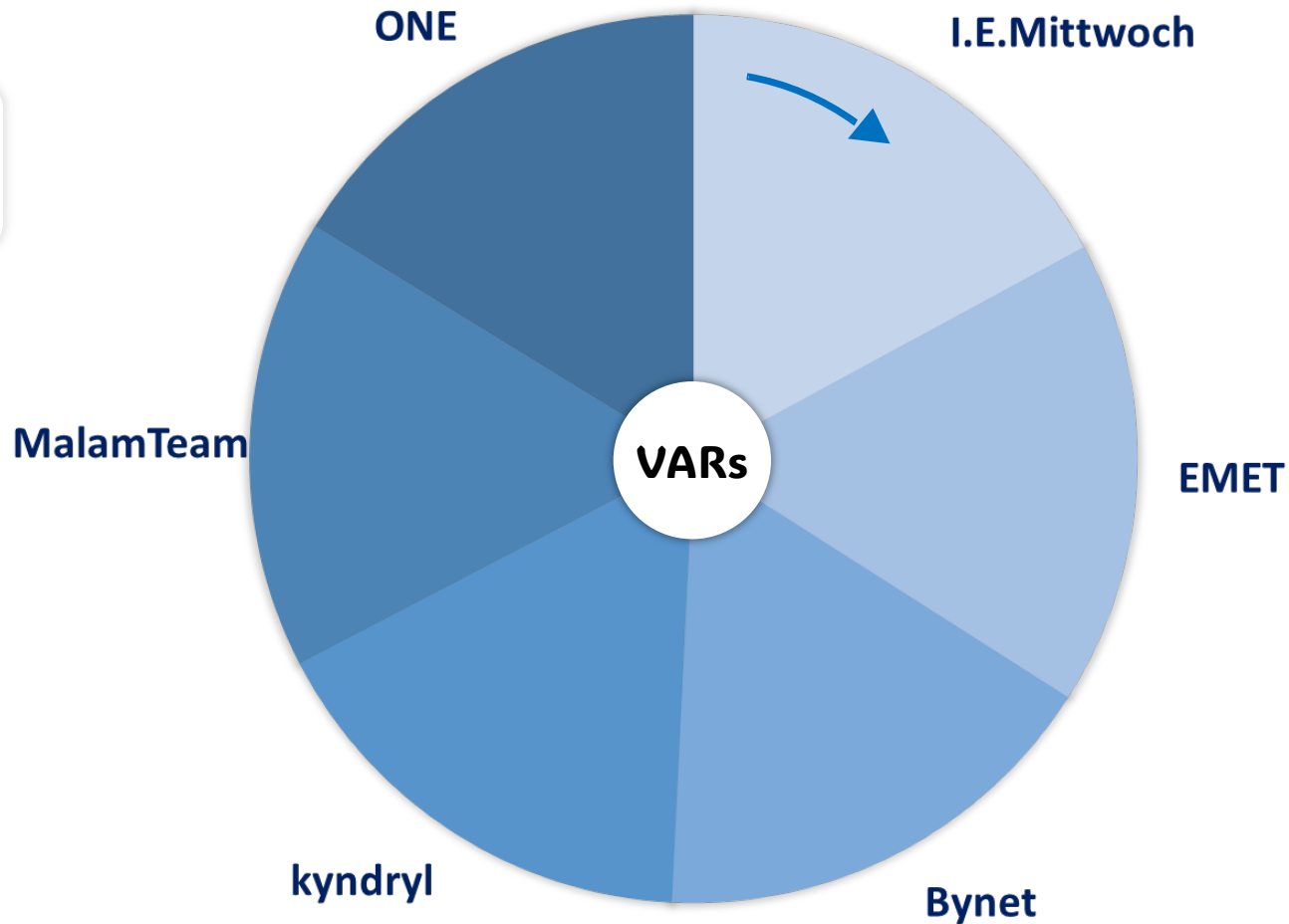
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Data Appliances



Infrastructure

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CLIENT MINDSHARE



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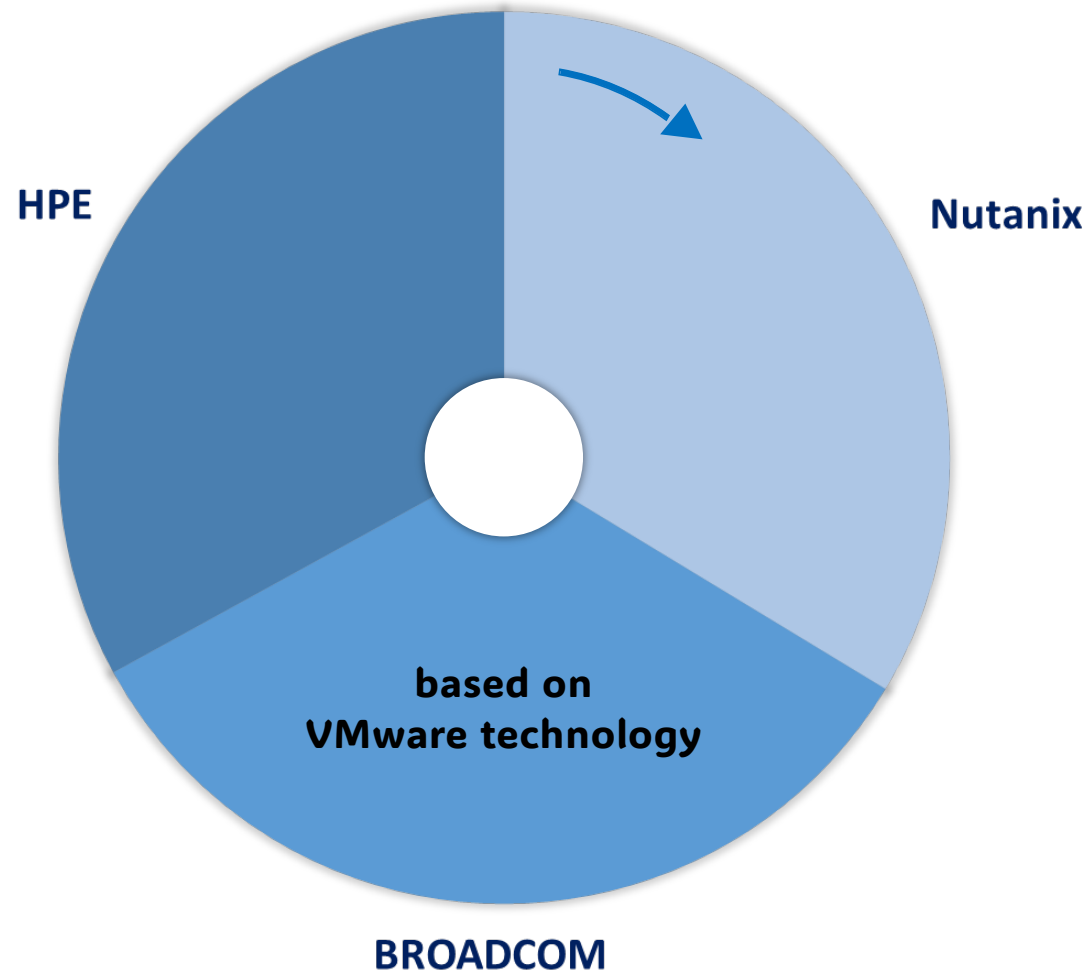
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Infrastructure

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

HCI Appliances (BASED ON VMWARE)



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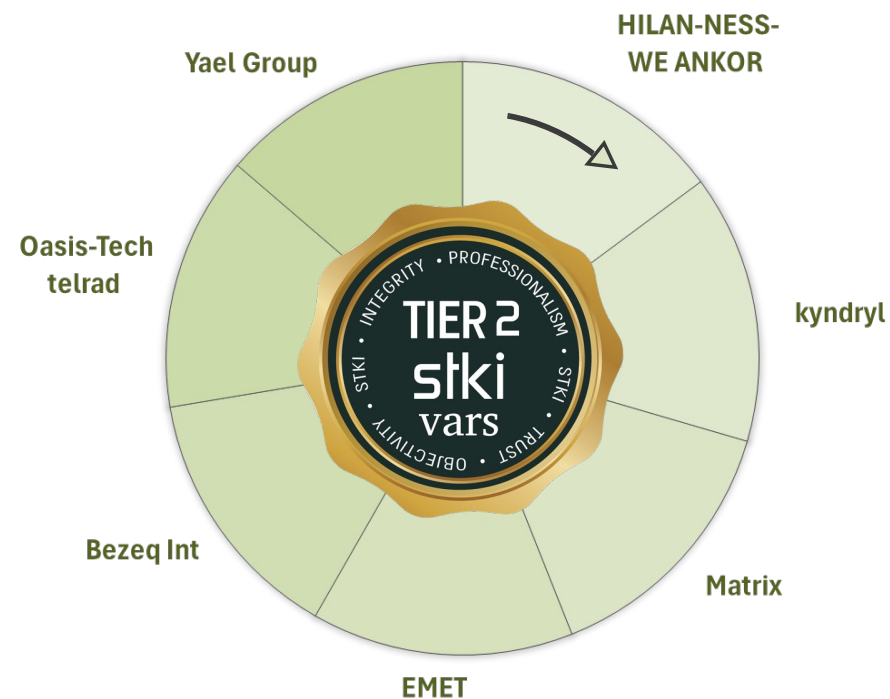
HCI Appliances VARs



Infrastructure



We rank VENDORS
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CLIENT MINDSHARE



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Infrastructure

Clients (enterprises only) Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Window PCs (Notebook & Desktops) Enterprise only	362	-3.31%	350	-18.57%	285	-12.28%	250	-28.00%	180	-33.33%	120	-4.17%	115	-4.35%	110
Non window's PC's Enterprise only	21	33.33%	28	-3.57%	27	-3.70%	26	-15.38%	22	-9.09%	20	5.00%	21	9.52%	23
TOTALS	383	-1.31%	378	-17.46%	312	-11.54%	276	-26.81%	202	-30.69%	140	-2.86%	136	-2.21%	133



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Values in Million USD

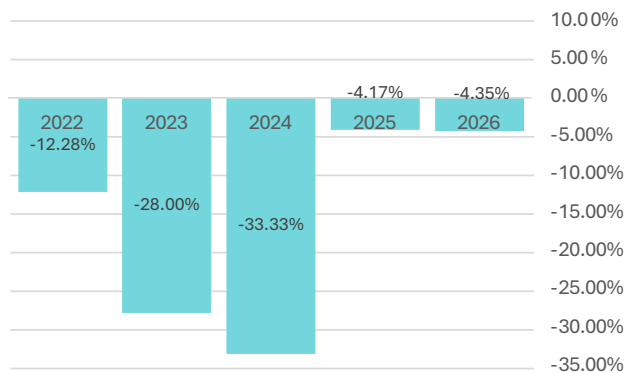


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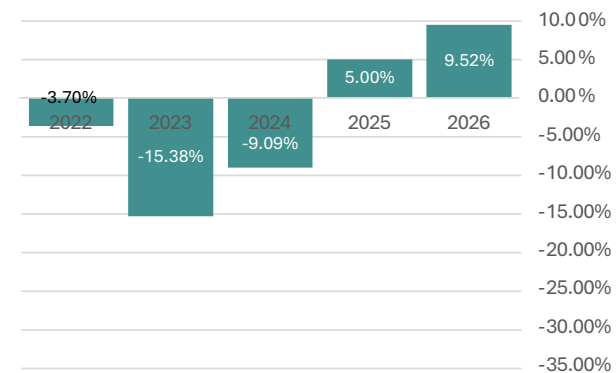


Clients (enterprises only) Market 2022-2026

Window PCs (Notebook & Desktops)
Enterprise only



Non window's PC's
Enterprise only

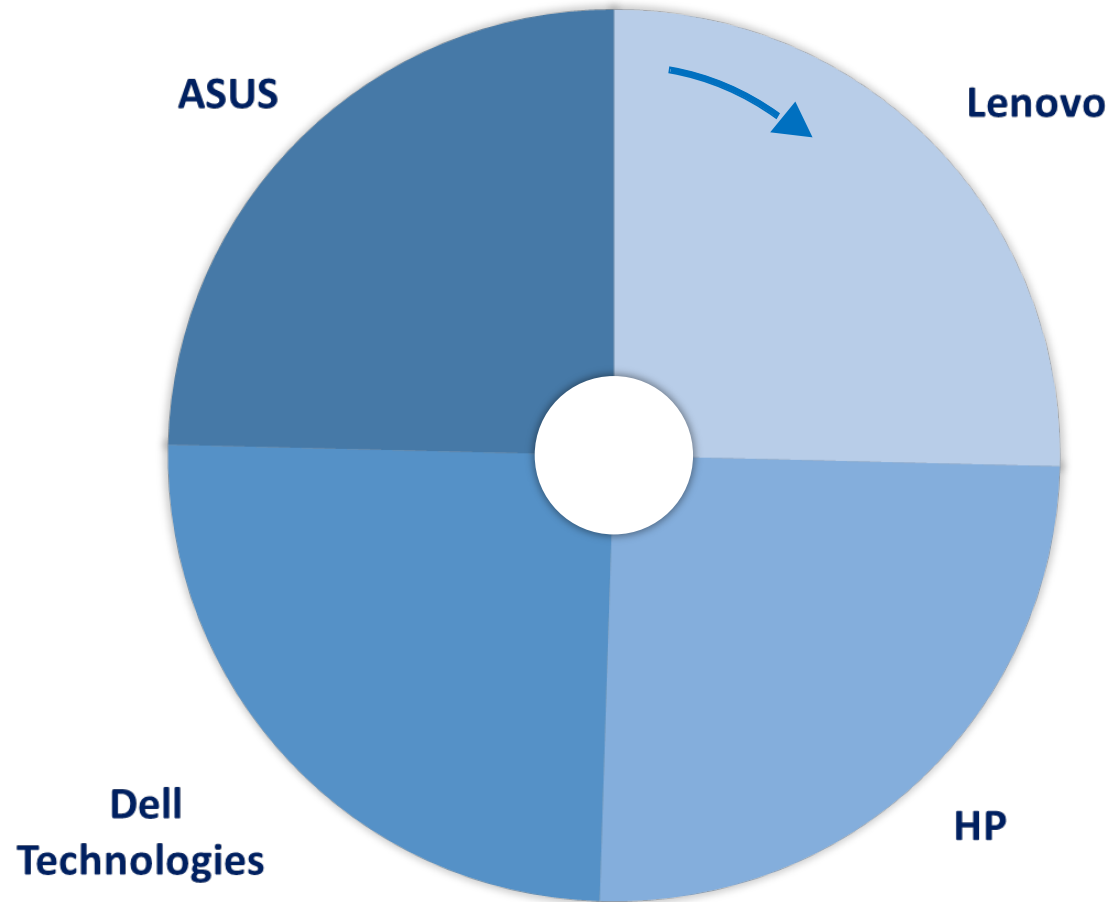




Infrastructure

We rank VENDORS
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CLIENT MINDSHARE

Window PCs (Notebook & Desktops) Enterprise only



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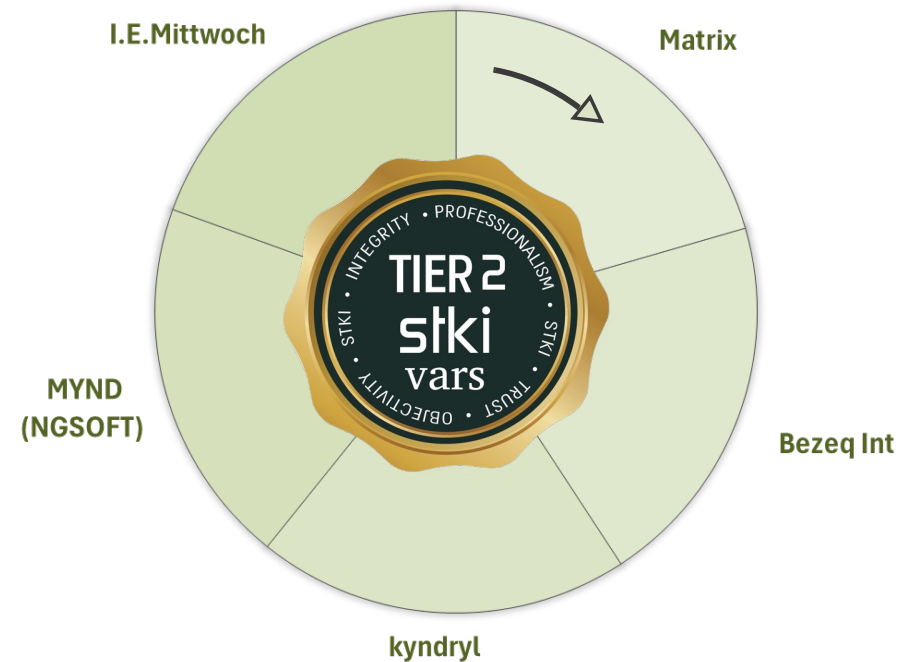
V2

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Infrastructure

Window PCs (Notebook & Desktops) Enterprise only



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Enterprise Storage Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Enterprise Storage :Disks (HHD and SSD)	132	2.27%	135	2.22%	138	2.90%	142	4.23%	148	1.35%	150	2.00%	153	2.61%	157
Other Storage HW - Tape Libraries & appliances, VTL Backup	42	48.00%	48	4.17%	50	-4.00%	48	-4.17%	46	-4.35%	44	-4.55%	42	-4.76%	40
Storage Networking							15	26.67%	19	10.53%	21	4.76%	22	-13.64%	19
TOTALS	174	5.17%	183	2.73%	188	9.04%	205	3.90%	213	0.94%	215	0.93%	217	-0.46%	216

Values in Million USD



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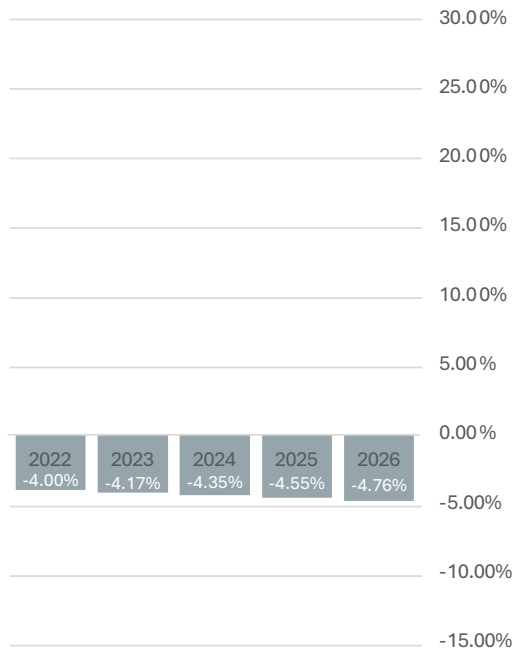
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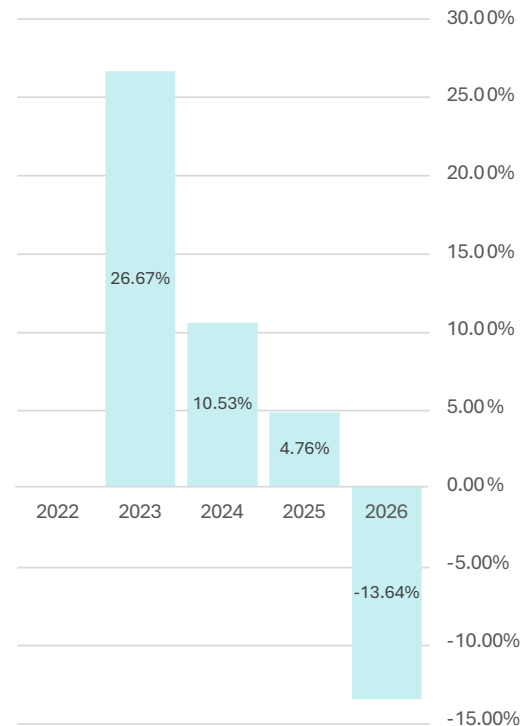
Infrastructure

Enterprise Storage Market 2022-2026

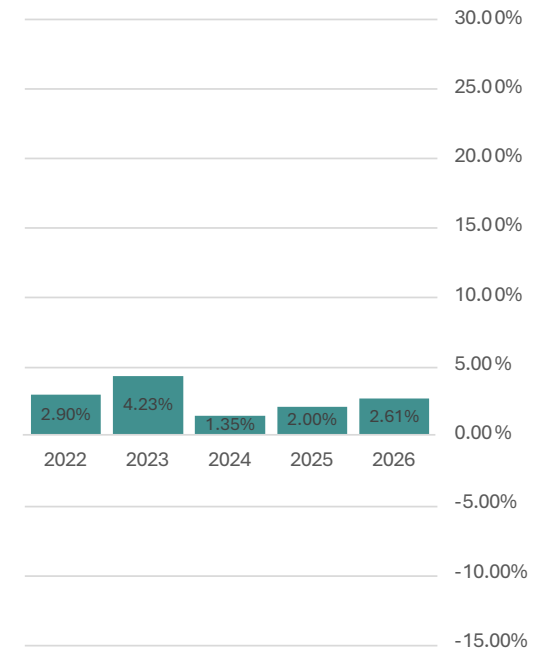
Other Storage HW - Tape
Libraries & appliances, VTL
Backup



Storage Networking



Enterprise Storage :Disks
(HHD and SSD)



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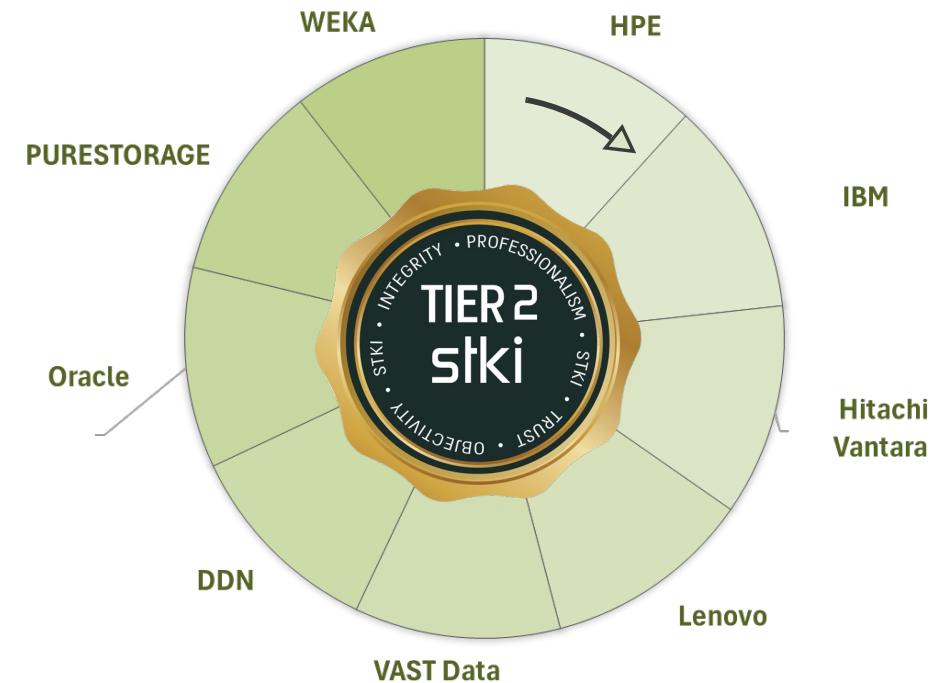


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Infrastructure

Enterprise Storage Disks (HHD & SSD)



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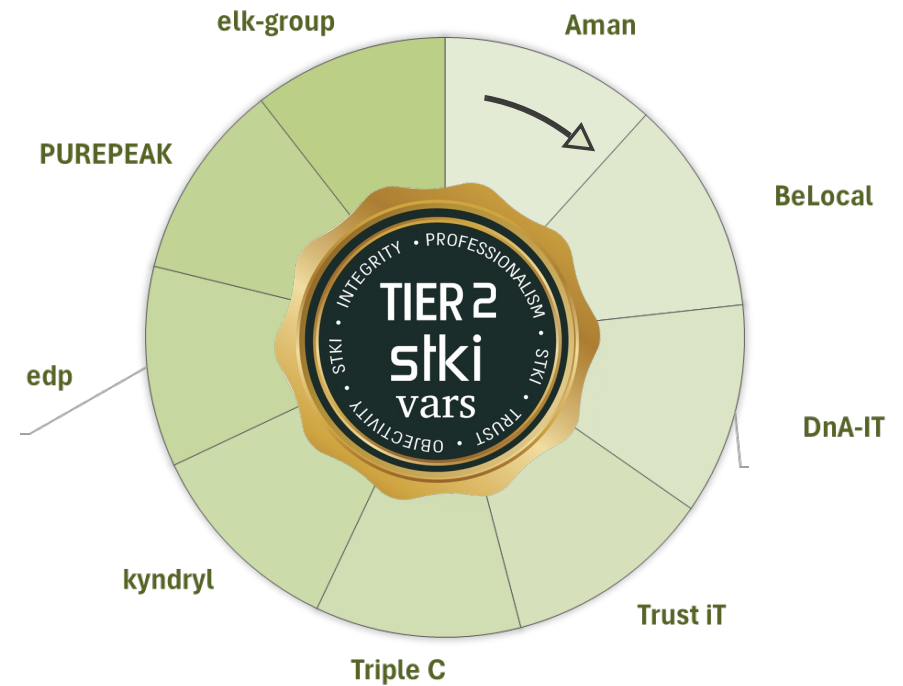


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Infrastructure

Enterprise Storage Disks (HHD & SSD) VARs



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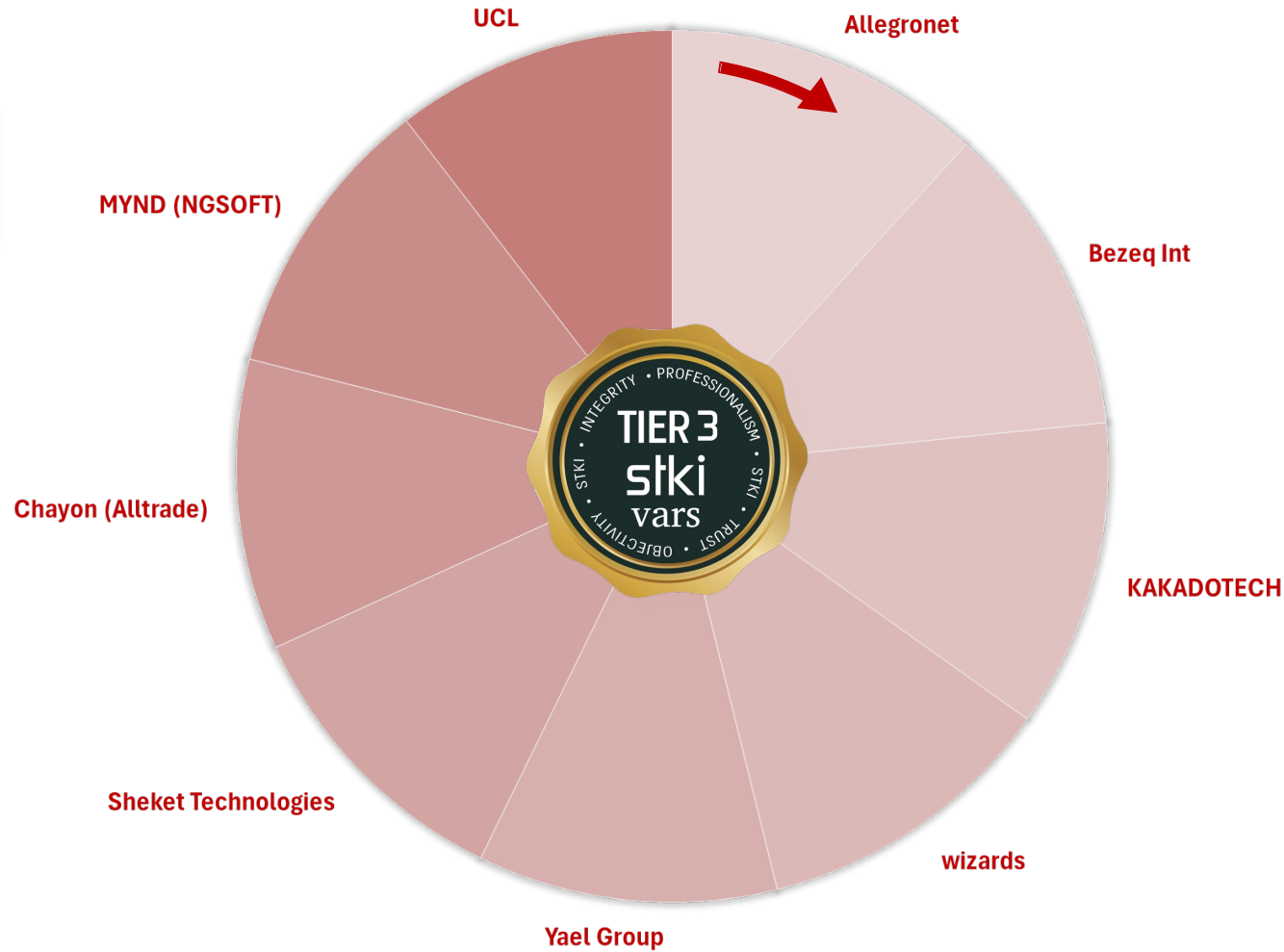
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Infrastructure

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

Enterprise Storage Disks (HHD & SSD) VARs



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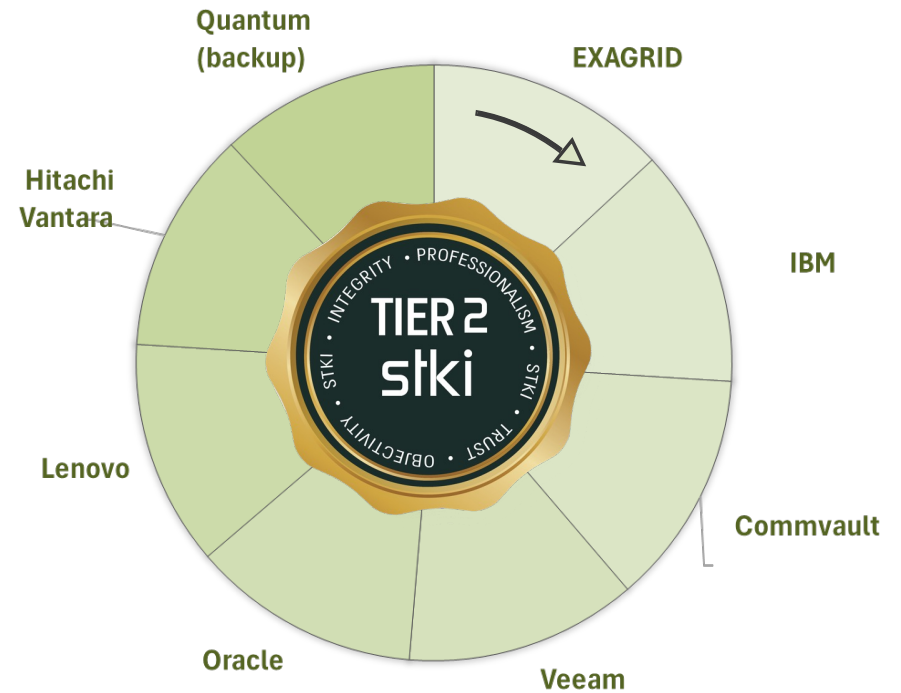
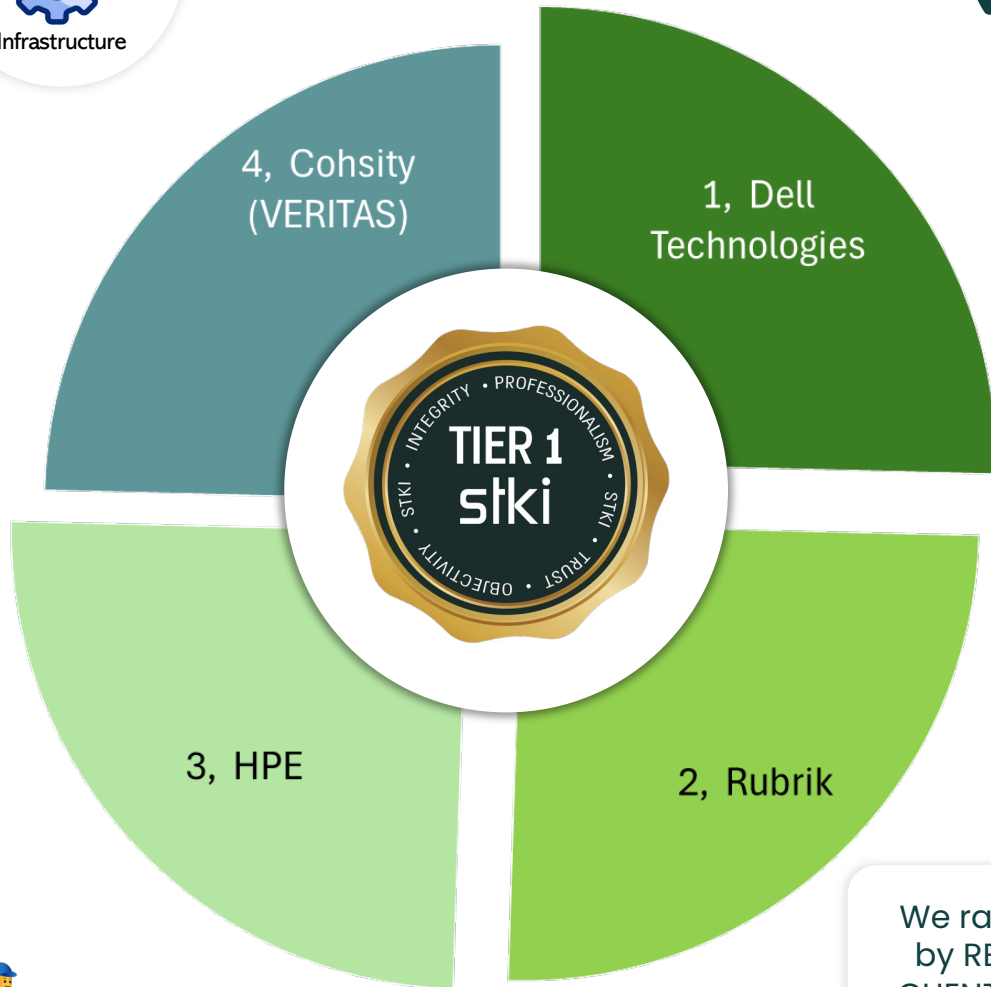


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Infrastructure

Other Storage HW - Tape Libraries & appliances, VTL Backup



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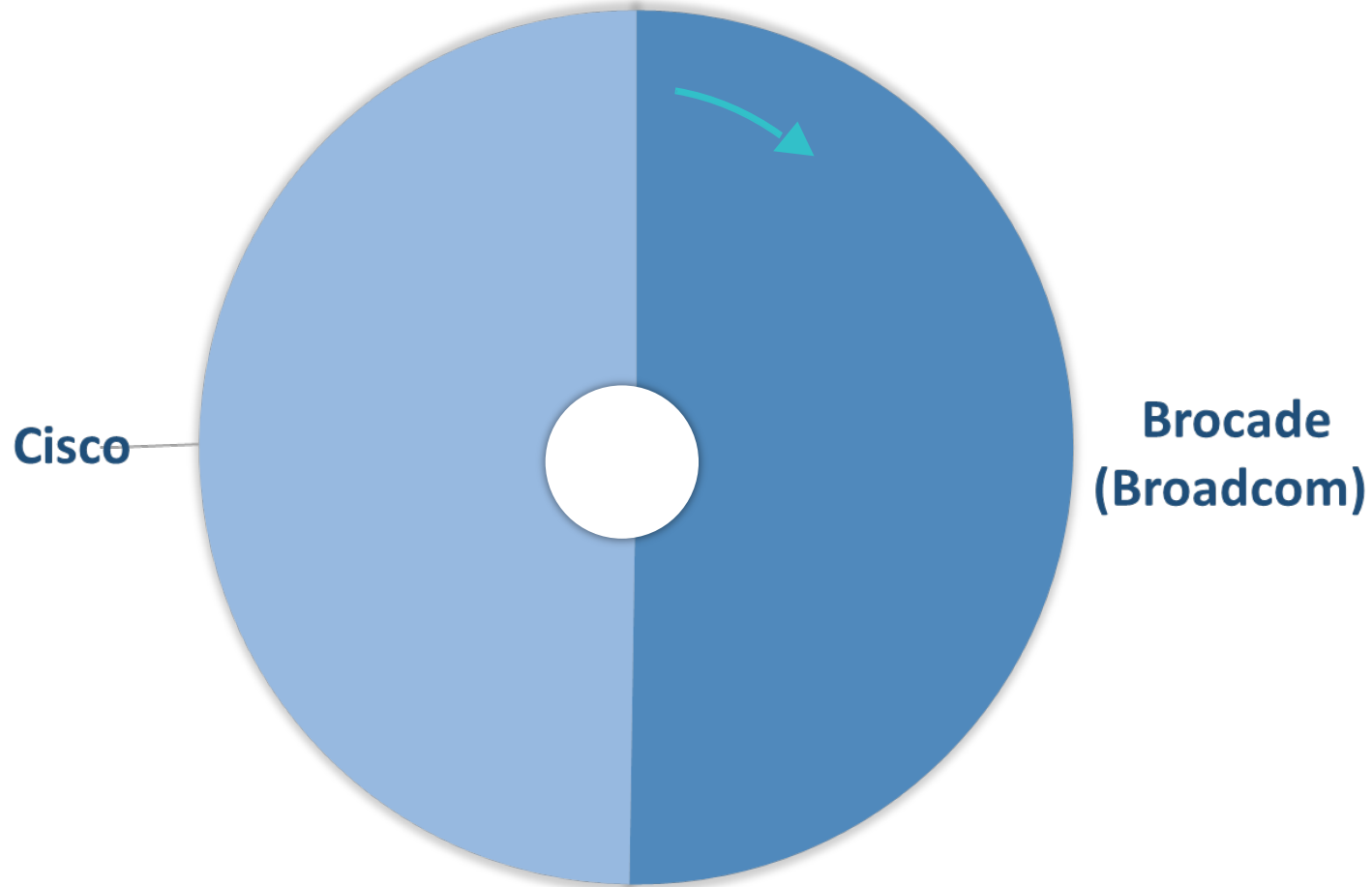
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Storage Networking



Infrastructure

We rank VENDORS
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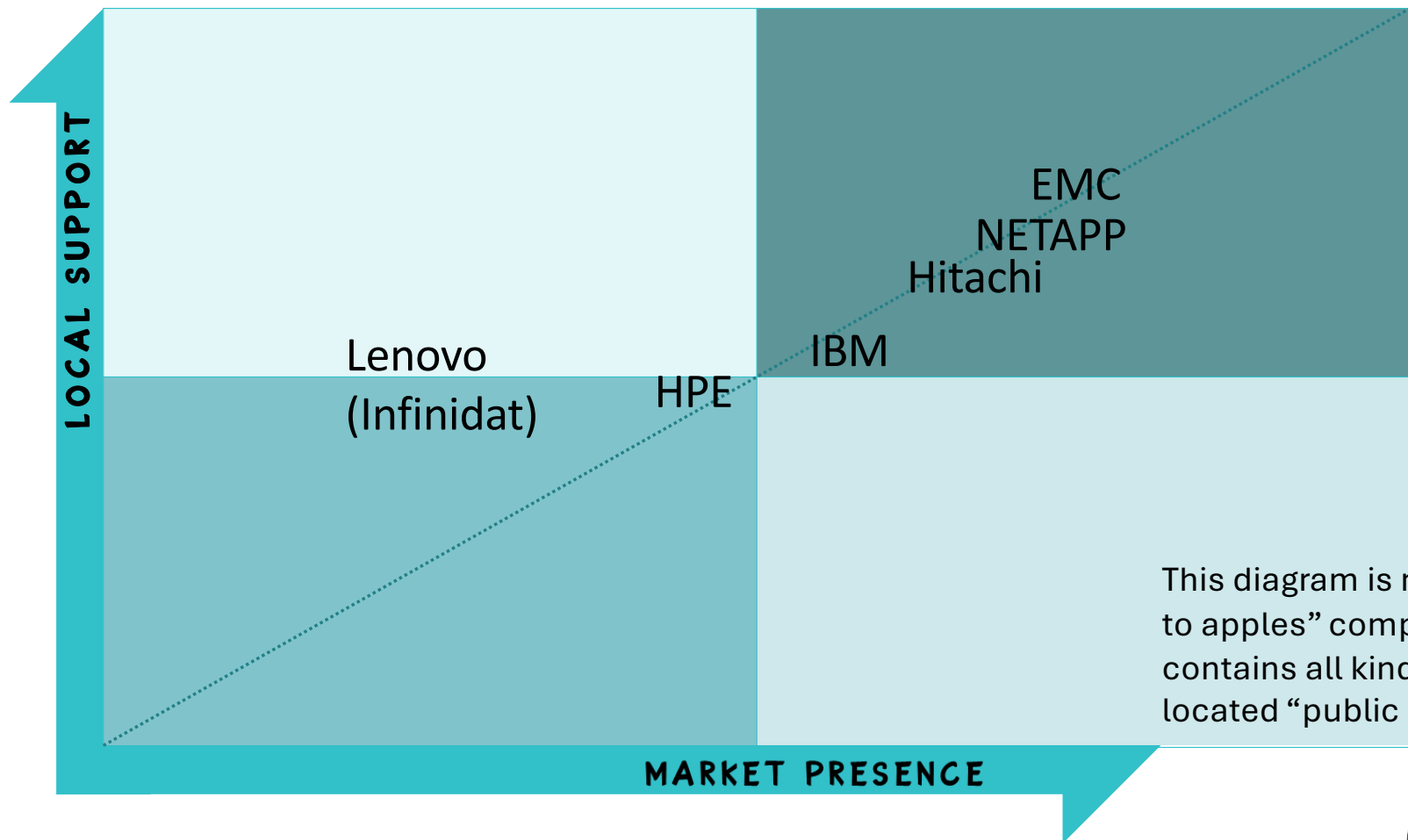


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Infrastructure

Israel enterprise high end for critical systems storage market presence 2025



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Networking, VoIP/Call Center, Call Center as a Service, Security Appliances Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Enterprise Networking	235	10.64%	260	1.92%	265	-5.66%	250	-6.00%	235	1.70%	239	0.84%	241	1.66%	245
Security / Cyber Appliances	180	8.33%	195	4.10%	203	2.46%	208	5.77%	220	5.00%	231	3.90%	240	5.00%	252
VoIP/Call Center Equipment	78	10.26%	86	6.98%	92	3.26%	95	5.26%	100	8.00%	108	9.26%	118	8.47%	128
Call Center as a Service	18	66.67%	30	16.67%	35	-5.71%	33	6.06%	35	8.57%	38	7.89%	41	9.76%	45
TOTALS	511	11.74%	571	4.20%	595	-1.51%	586	0.68%	590	4.41%	616	3.90%	640	4.69%	670



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Values in Million USD

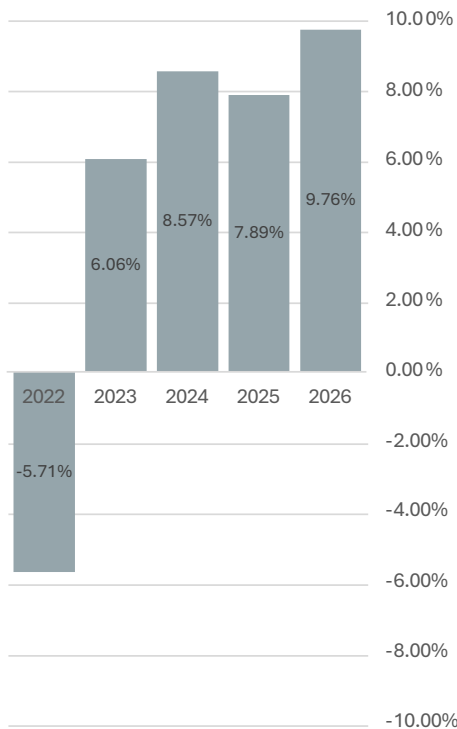


72

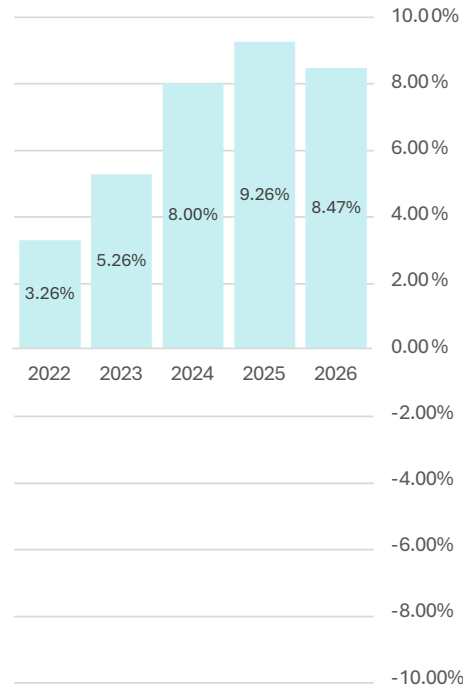


Networking, VoIP/Call Center, Call Center as a Service, Security Appliances Market 2022-2026

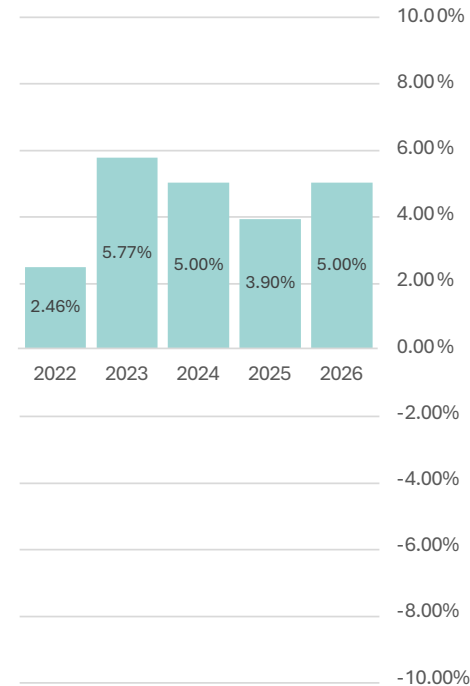
Call Center as a Service



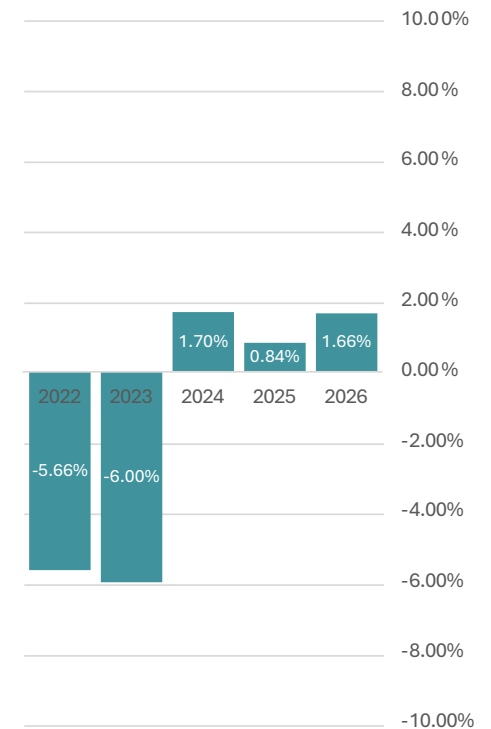
VoIP/Call Center Equipment



Security / Cyber Appliances



Enterprise Networking



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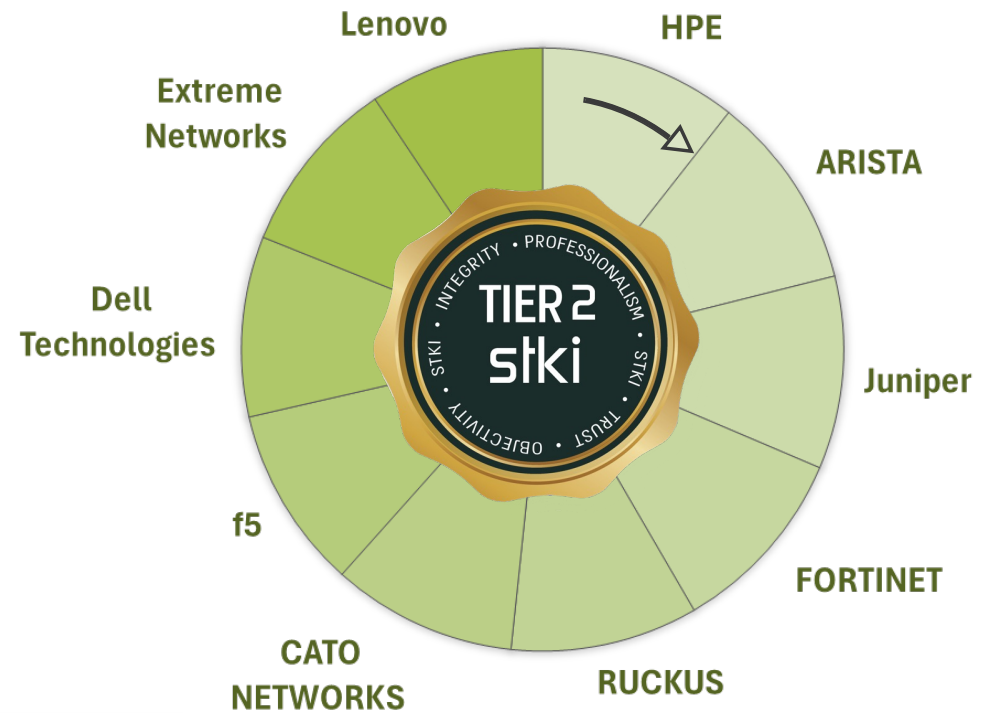


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Infrastructure

Enterprise Networking



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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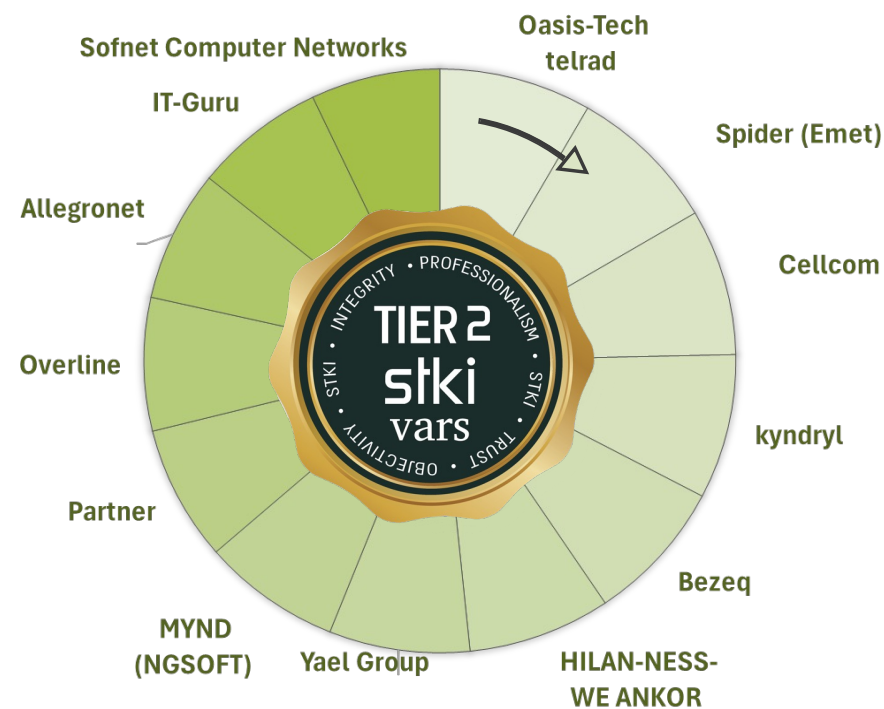
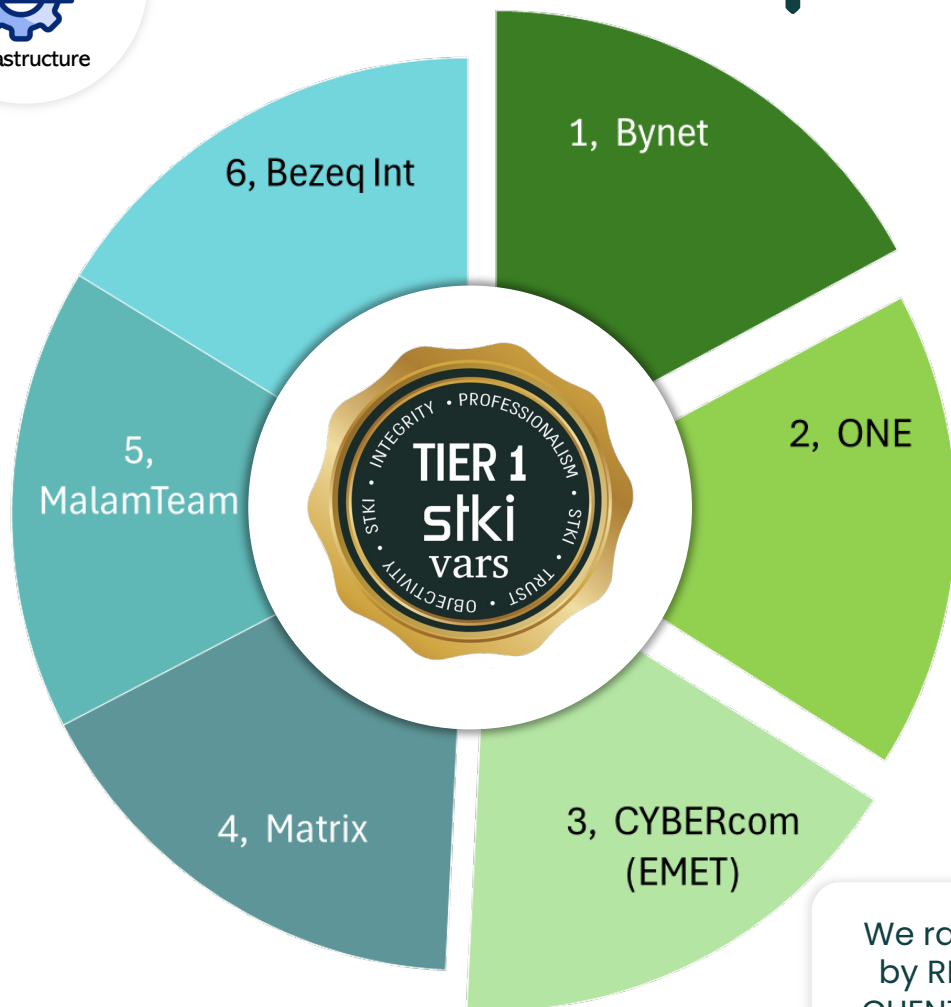


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Enterprise Networking VARs



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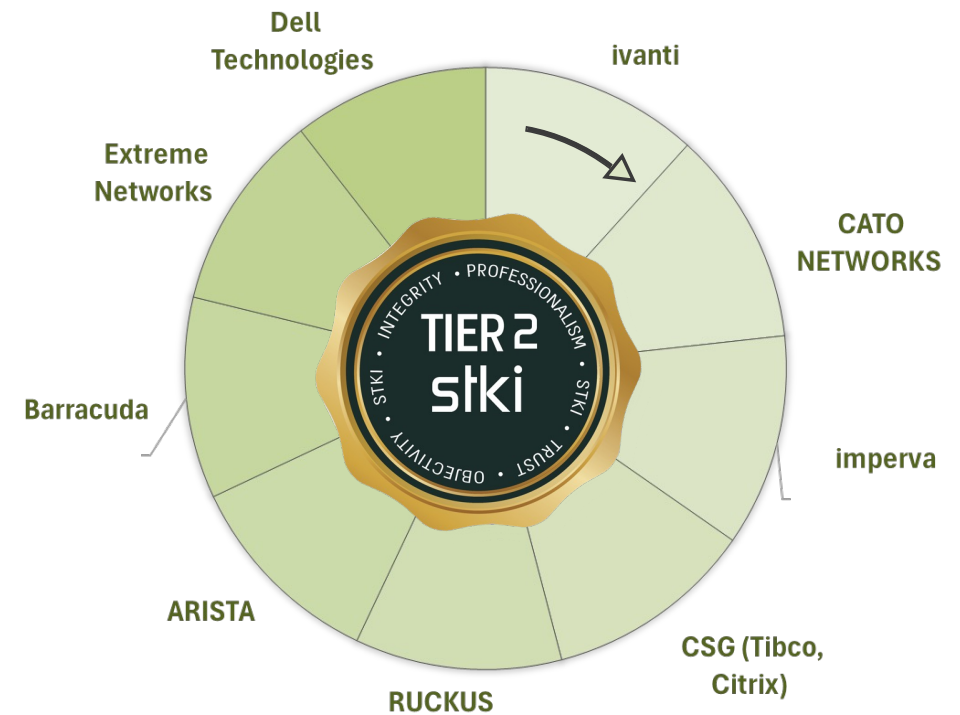


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Security/ Cyber Appliances



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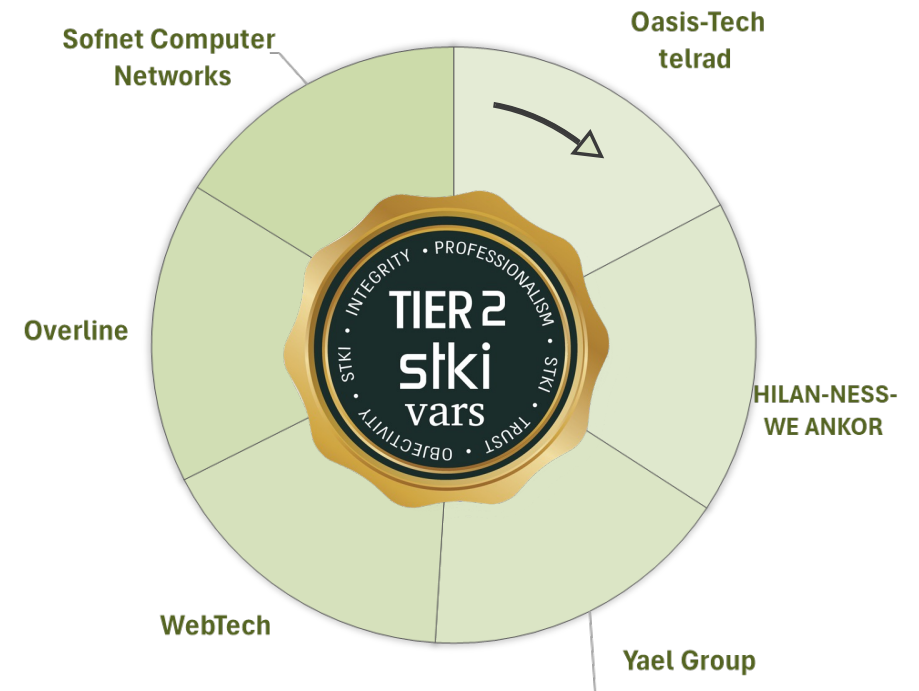


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Security/ Cyber Appliances VARs



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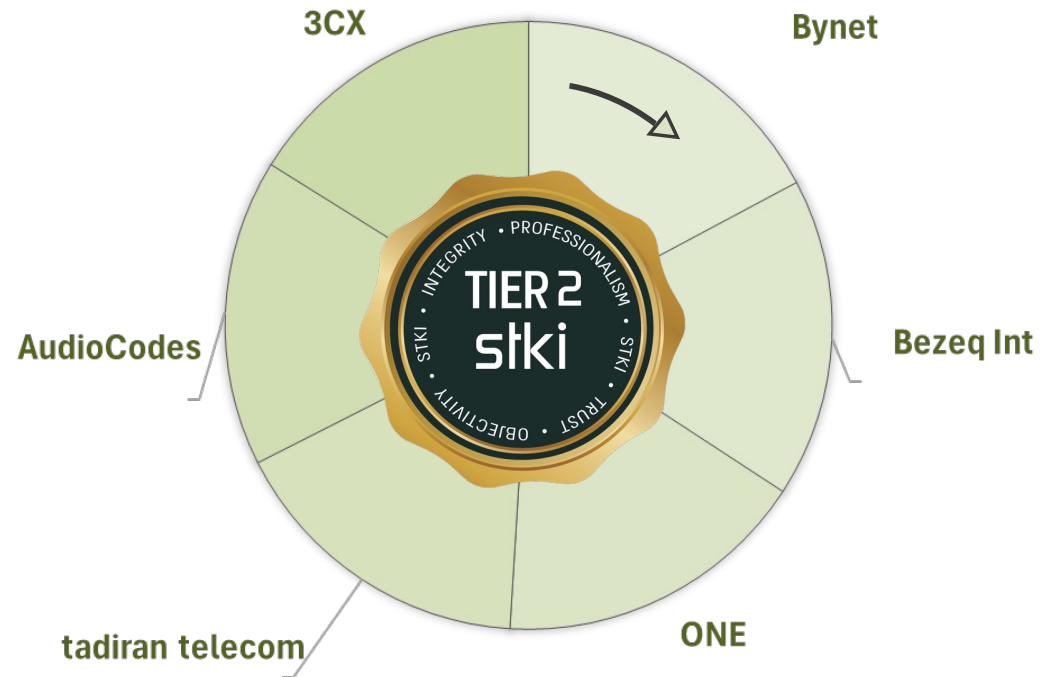
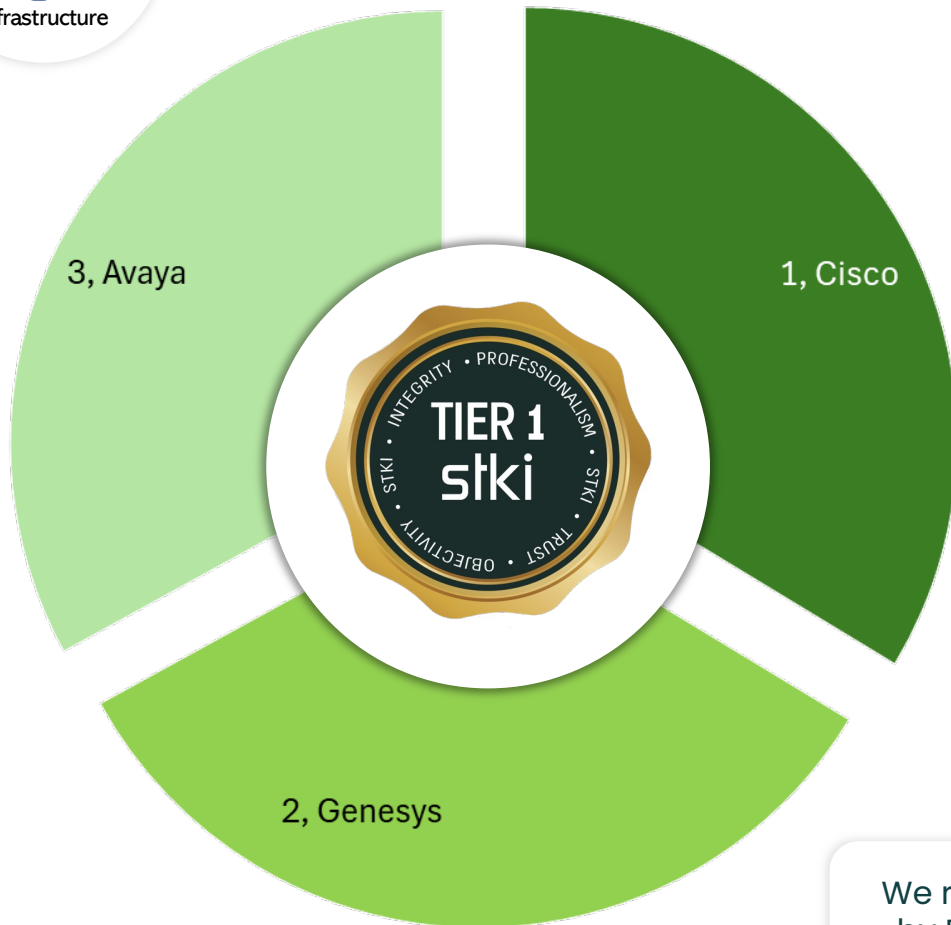


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Infrastructure

VoIP / Call Center Equipment



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CLIENT MINDSHARE



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CALL CENTER as a SERVICE



Infrastructure



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Data Center Equipment , Co-location Services, Self Service (POS, Robot, Self Service, ATM, Kiosks) Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Data Center Physical Equipment	85	20.00%	102	2.94%	105	-2.86%	102	-3.92%	98	10.20%	108	11.11%	120	11.67%	134
Off-site Data Center: Co-Location; Hosting (Client owns the HW)	102	22.55%	125	28.00%	160	15.63%	185	13.51%	210	11.90%	235	11.49%	262	10.69%	290
POS +Self Service (ATM/Kiosks/other)	190	7.89%	205	2.44%	210	-4.76%	200	-7.50%	185	-10.81%	165	3.03%	170	2.94%	175
TOTALS	377	14.59%	432	9.95%	475	2.53%	487	1.23%	493	3.04%	508	8.66%	552	8.51%	599



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Values in Million USD

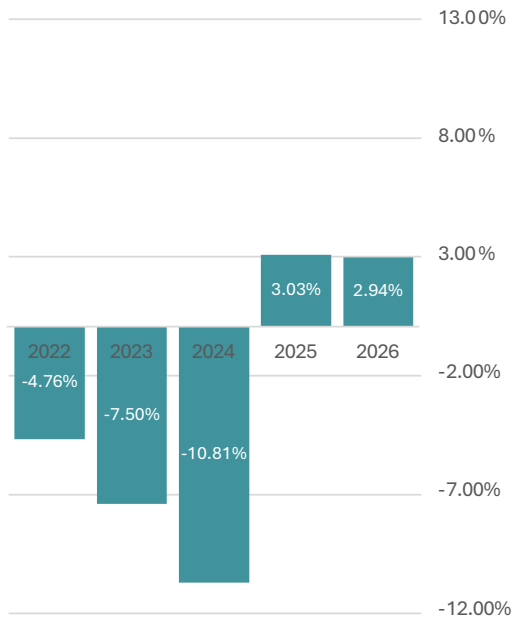


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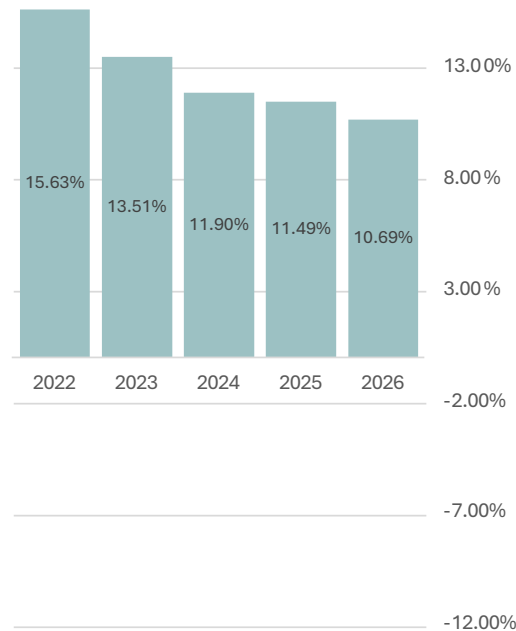


Data Center Equipment , Co-location Services, Self Service (POS, Robot, Self Service, ATM, Kiosks) Market 2020-2027

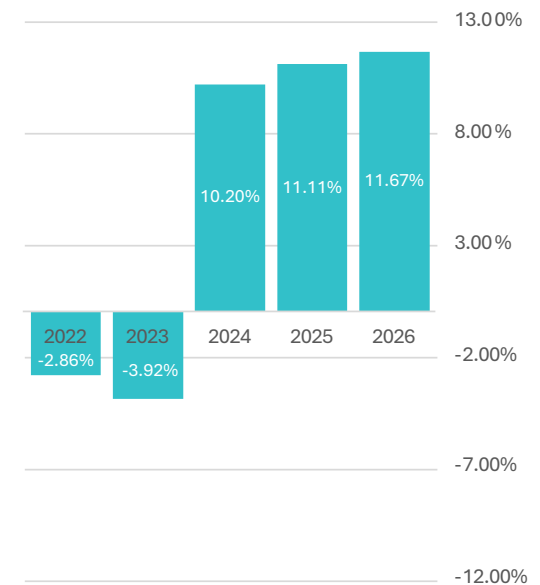
POS +Self Service
(ATM/Kiosks/other)



Off-site Data Center: Co-Location; Hosting (Client owns the HW)



Data Center Physical Equipment



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Infrastructure

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

Data Center Physical Equipment

ALEXANDER SCHNEIDER

APC by Schneider
Electric

CORNING

ABB

Stulz

Eaton DC

PANDUIT

Vertiv

Rittal



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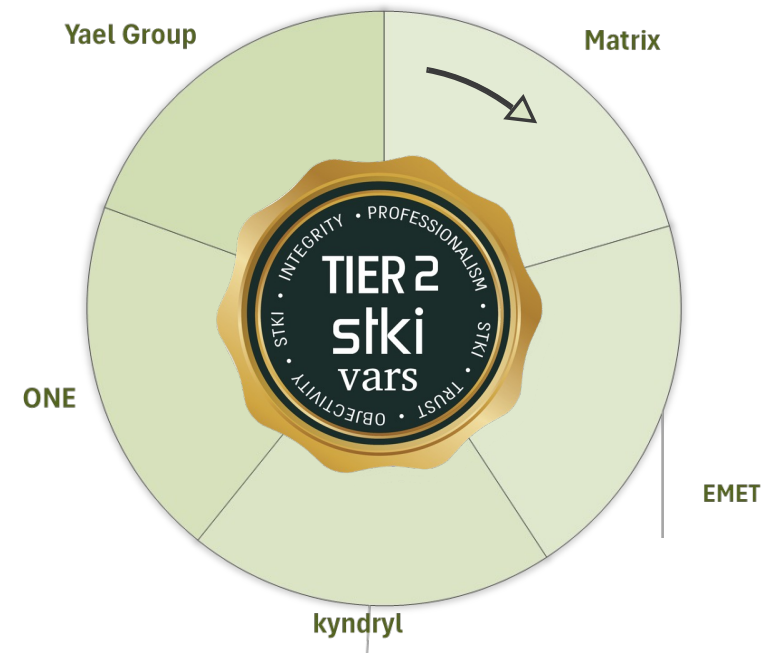


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Infrastructure

Data Center Passive Physical Equipment VARs



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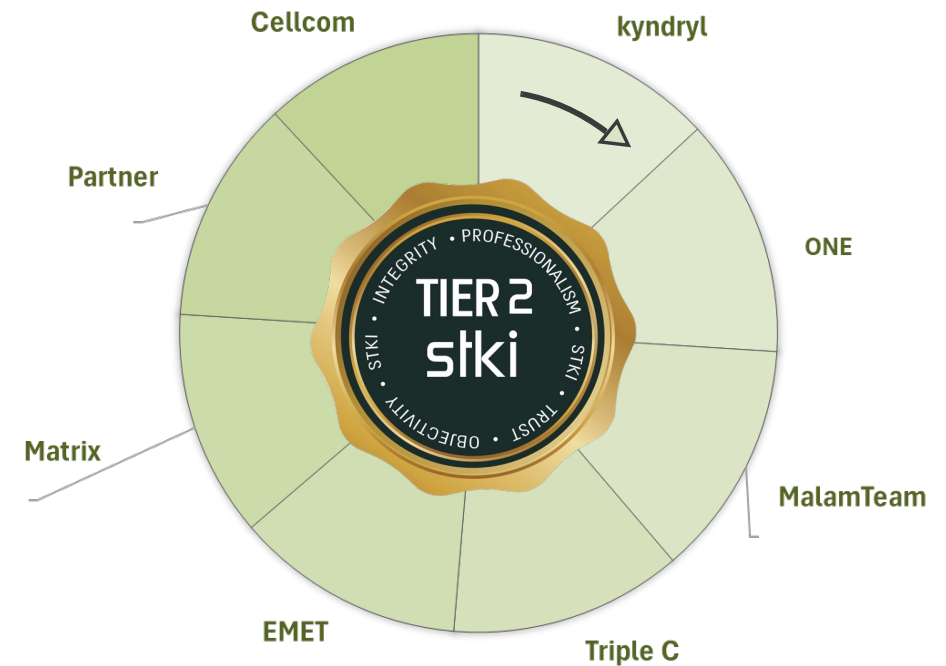


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Infrastructure

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



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CLIENT MINDSHARE



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General Purpose Cloud Enterprise Consumption Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
General Purpose Cloud consumption	200	30.00%	260	38.46%	360	5.56%	380	10.53%	420	7.14%	450	9.33%	492	10.77%	545
TOTALS	200	30.00%	260	38.46%	360	5.56%	380	10.53%	420	7.14%	450	9.33%	492	10.77%	545



Values in Million USD

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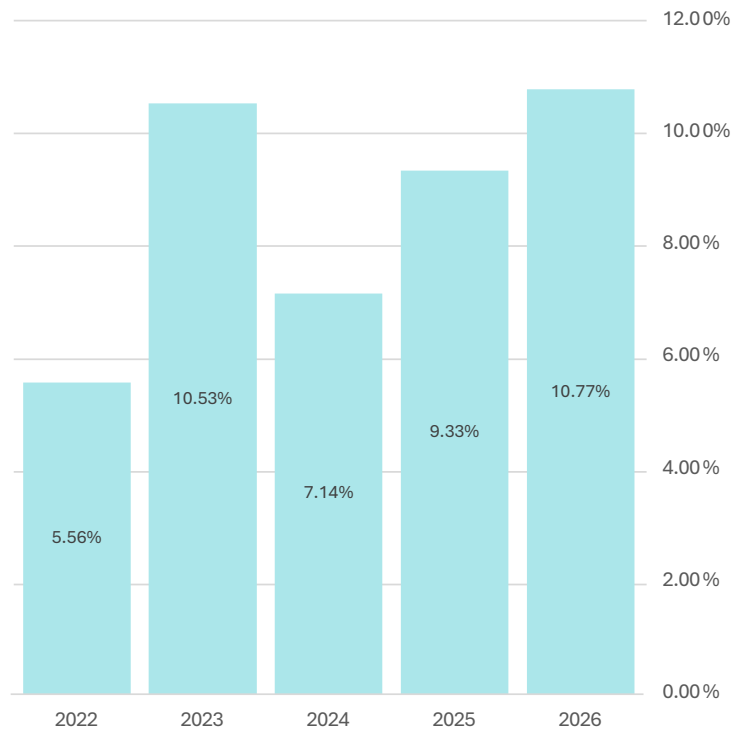




Infrastructure

General Purpose Cloud Enterprise Consumption Market 2022-2026

General Purpose Cloud consumption



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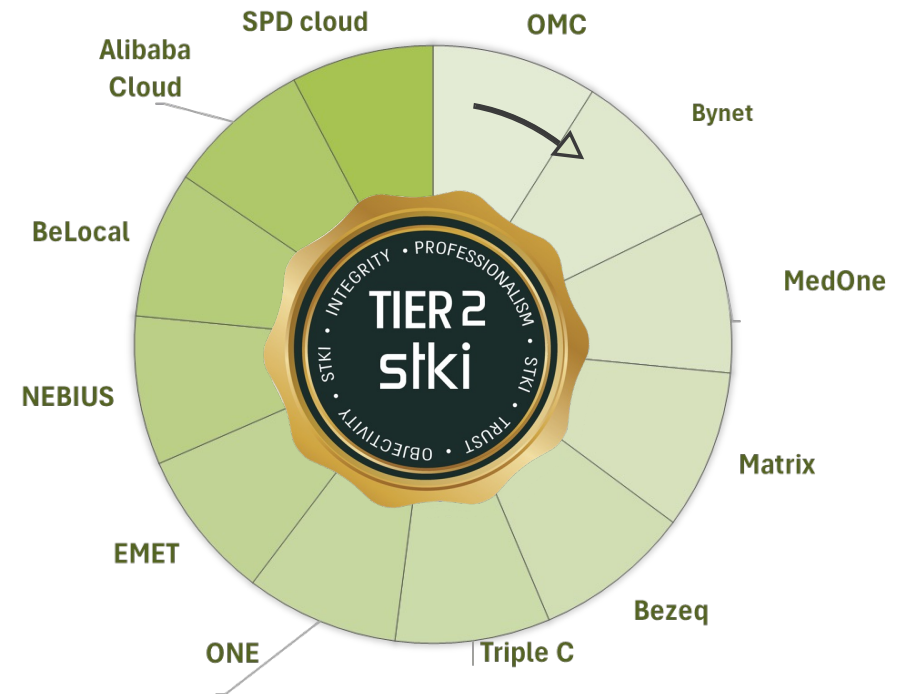


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Infrastructure

General Purpose Cloud Consumption



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CLIENT MINDSHARE



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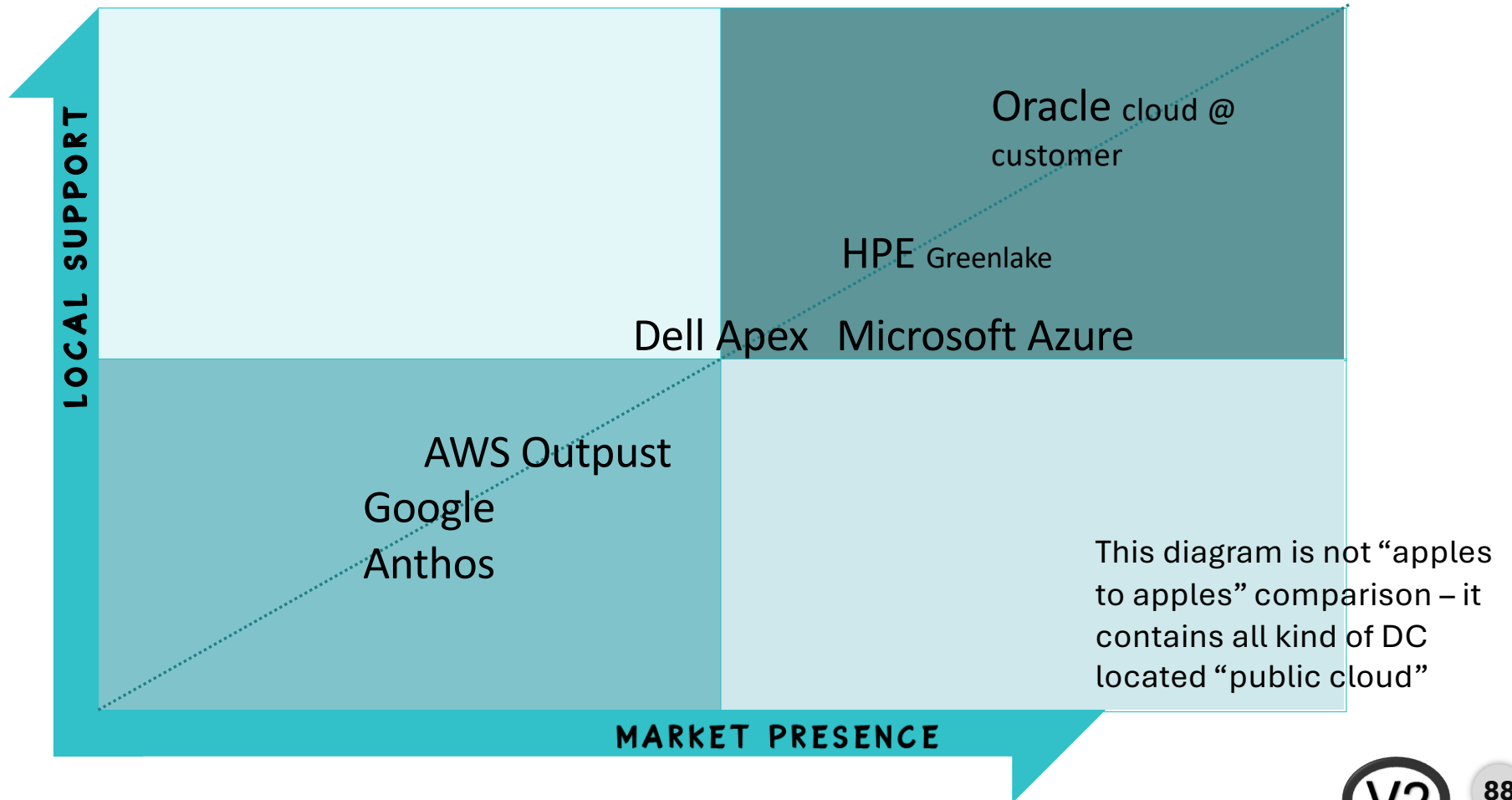
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Cloud on premise for Israeli Enterprises- market presence 2025



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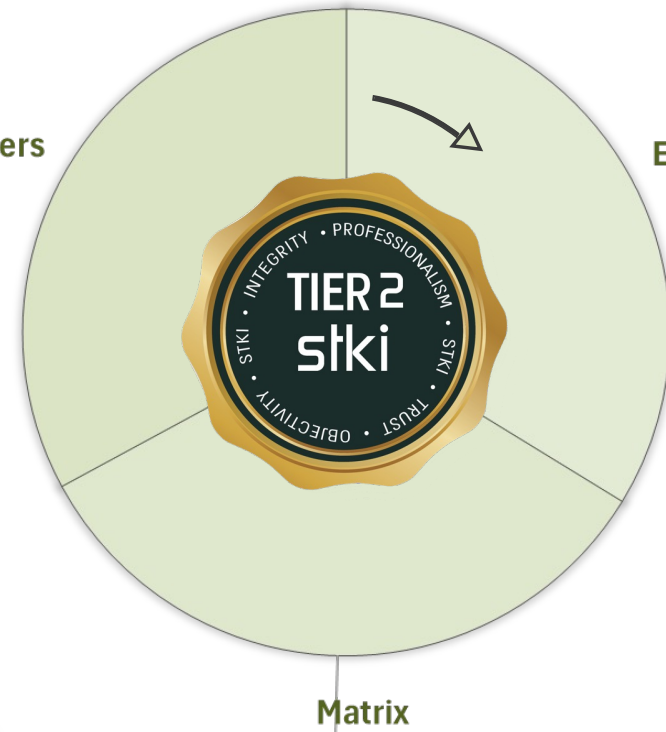
Infrastructure

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



others

Ewave



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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Israel

Software Product Markets 2025 "vendor rankings"



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI
Analyst



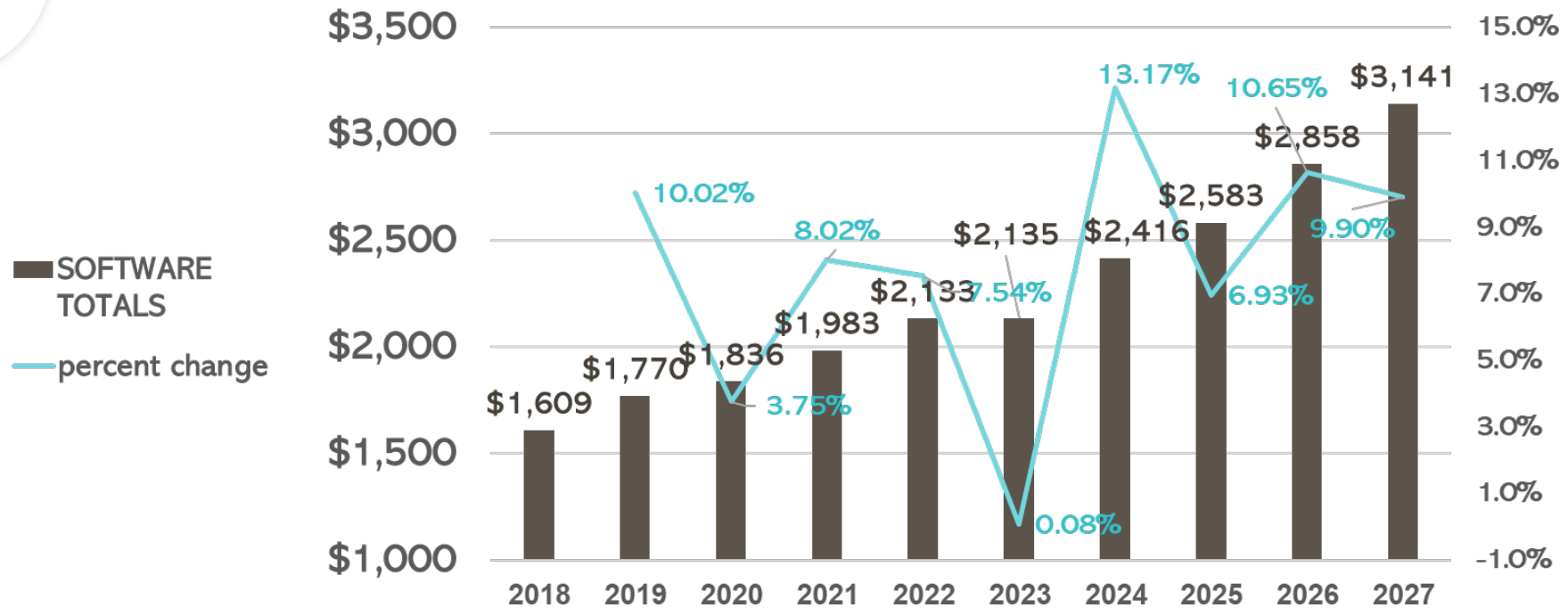
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software

Software (on-prem & cloud) Market 2018-2027



2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
\$1,608.50	\$1,769.70	\$1,836.00	\$1,983.30	\$2,132.80	\$2,134.50	\$2,415.60	\$2,583.10	\$2,858.10	\$3,141.00
	10%	3.75%	8.02%	7.54%	0.08%	13.17%	6.93%	10.65%	9.90%

Values in Million USD



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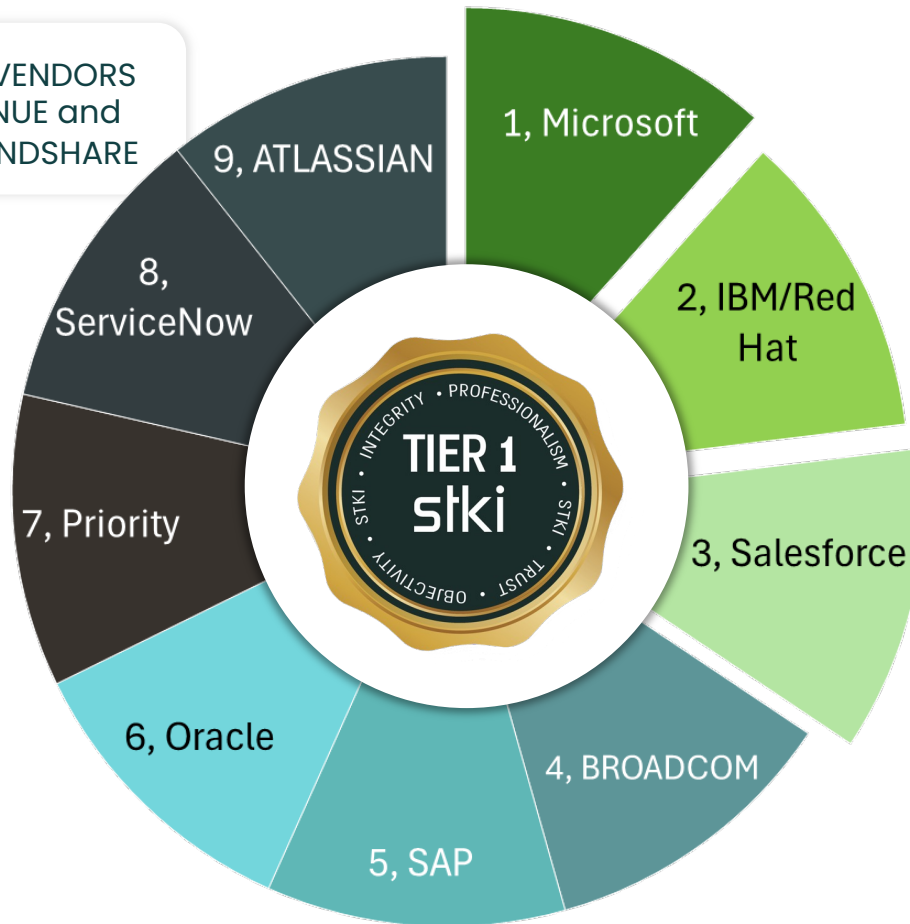


software

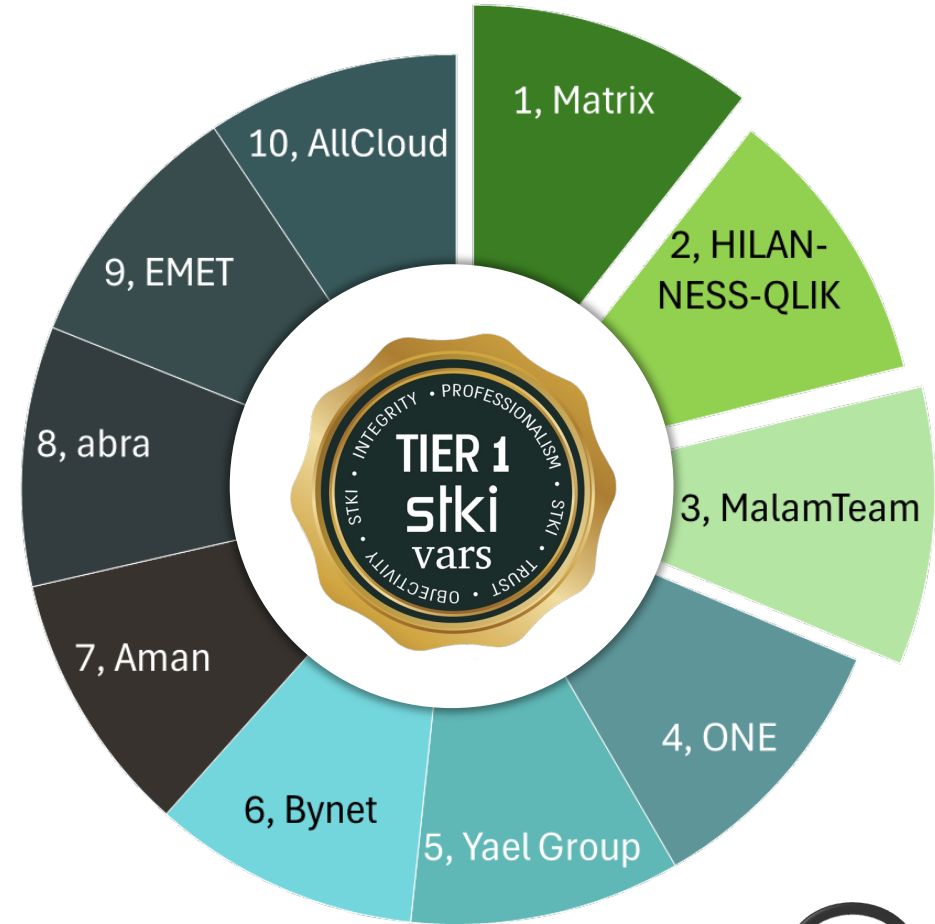
TOP VENDORS: Software Markets

Software & Tools suppliers

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



Software & Tools VARs



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SOFTWARE CATEGORIES (pages)

Storage & Backup
Tools

Page: 229

Middleware Tools

Page: 235

IT Management &
Operations Tools

Page: 241

Security & Cyber
Tools

Page: 259

Project
Development &
Management
Tools

Page: 276

EGRC Tools

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Knowledge &
Collaboration
Tools

Page: 293

BI, Data
Management and
Analytical AI

Page: 299

Enterprise
Management
Tools

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Application Tools

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Automation and AI

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Industry Specific
and Special
Purpose
Applications

Page: 362



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software

System, Storage & Data Platforms Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Infrastructure & System Software (including storage software)	295	6.78%	315	-3.17%	305	-4.92%	290	6.90%	310	1.61%	315	1.59%	320	1.56%	325
data platforms (SQL, NoSQL dbms)	60	3.33%	62	4.84%	65	-7.69%	60	-8.33%	55	9.09%	60	8.33%	65	9.23%	71
Cloud data platforms (SQL, NoSQL dbms)			10	50.00%	15	33.33%	20	50.00%	30	36.67%	41	26.83%	52	15.38%	60
TOTALS	355	9.01%	387	-0.52%	385	-3.90%	370	6.76%	395	5.32%	416	5.05%	437	4.35%	456

Values in Million USD



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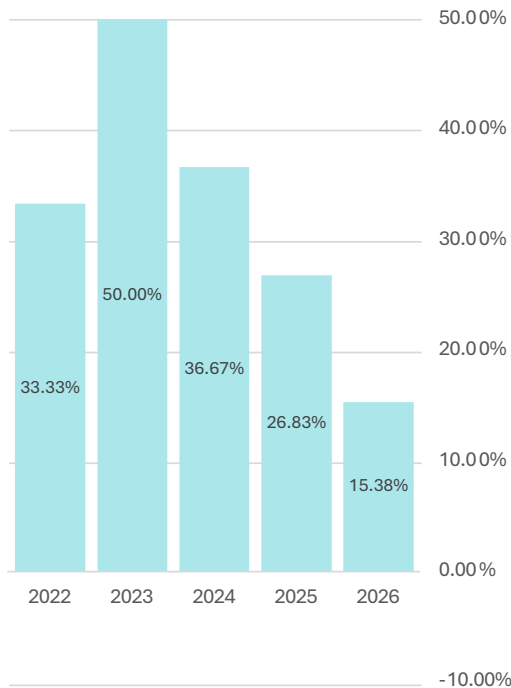
94



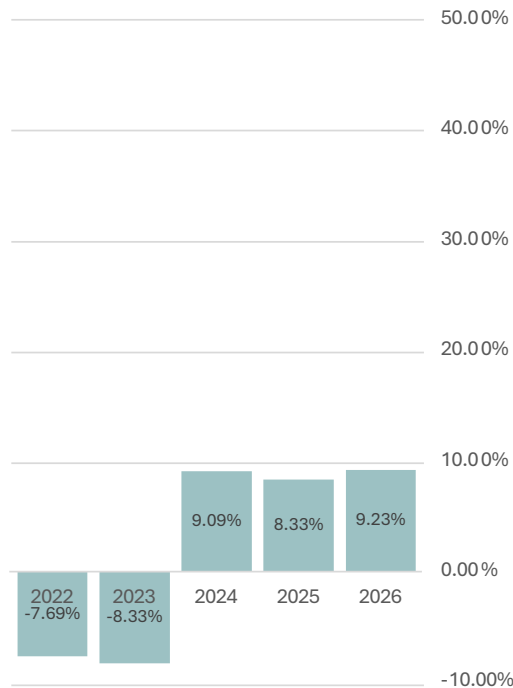
software

System, Storage & Data Platforms Market 2022-2026

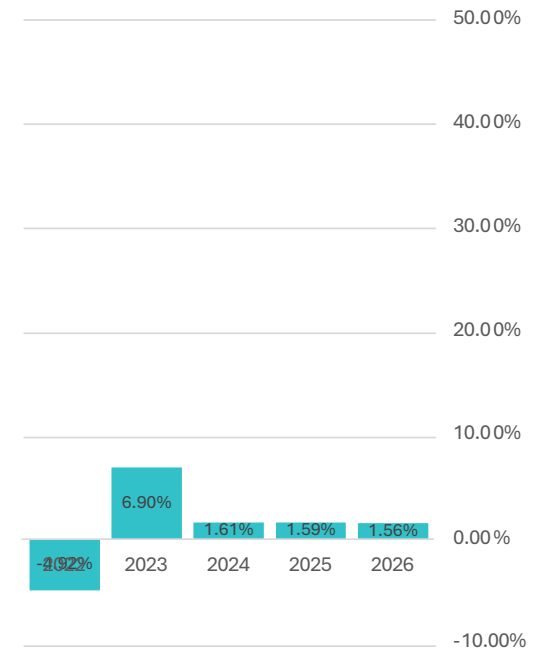
Cloud data platforms (SQL, NoSQL dbms)



data platforms (SQL, NoSQL dbms)



Infrastructure & System Software (including storage software)



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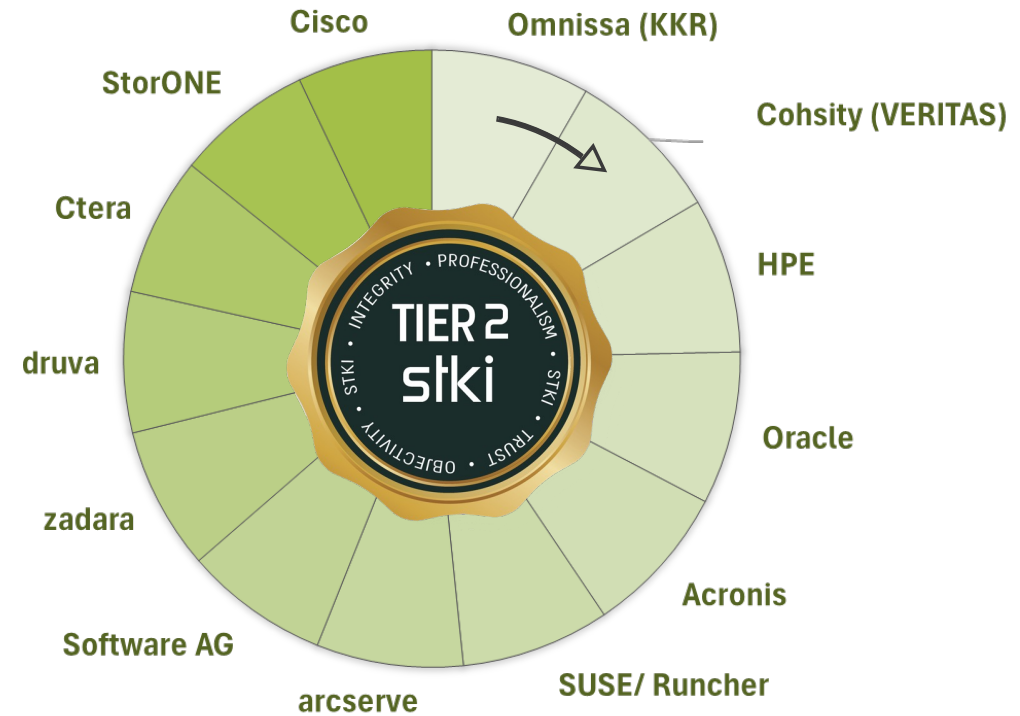
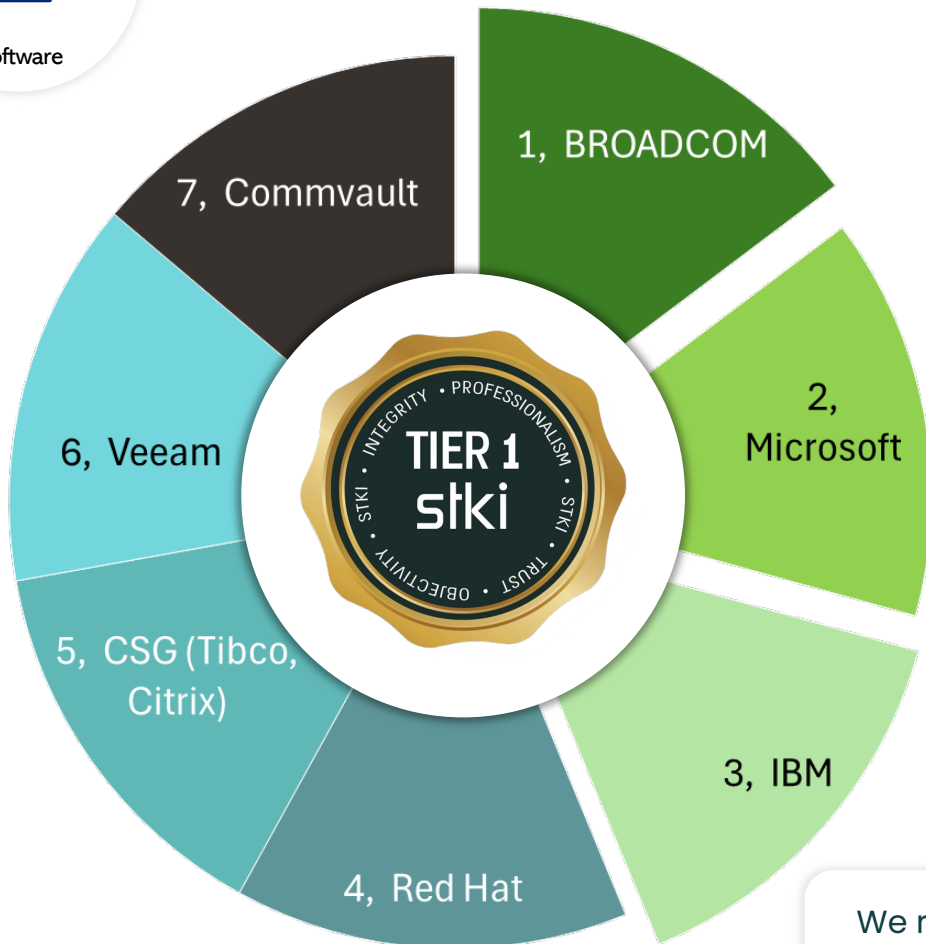


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Infrastructure & System (including storage) Software



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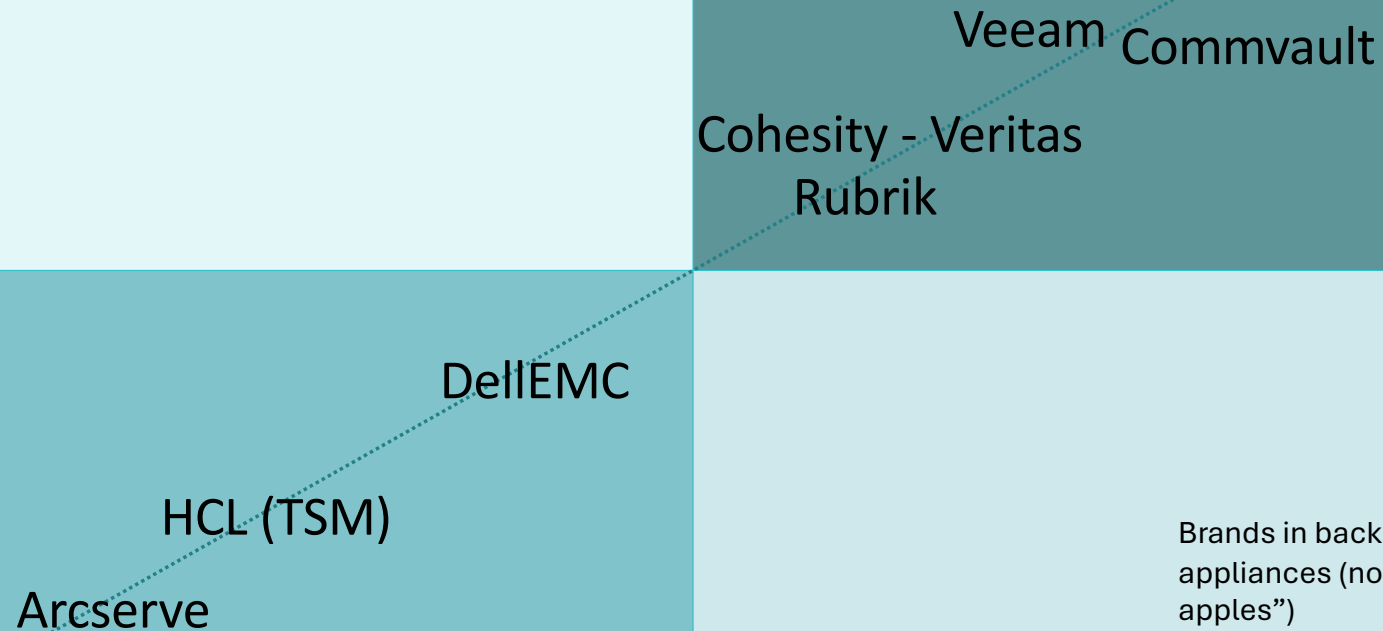
software

Israel enterprise backup brands market presence 2025



HPE (new solution)

LOCAL SUPPORT



MARKET PRESENCE



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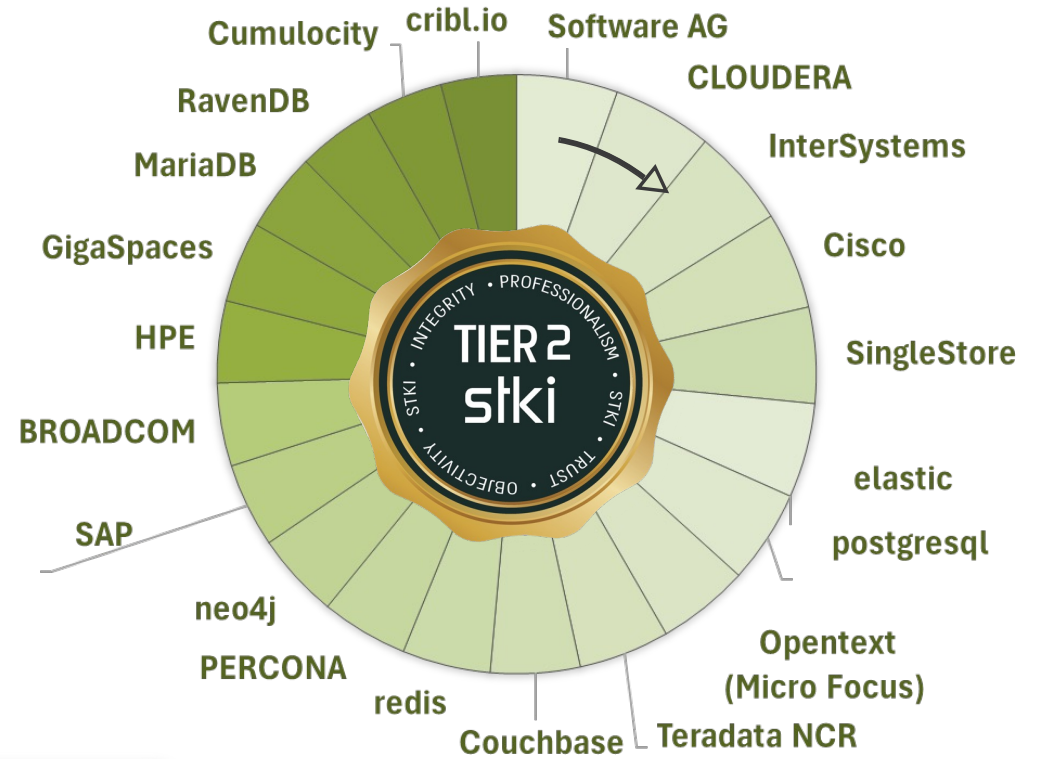
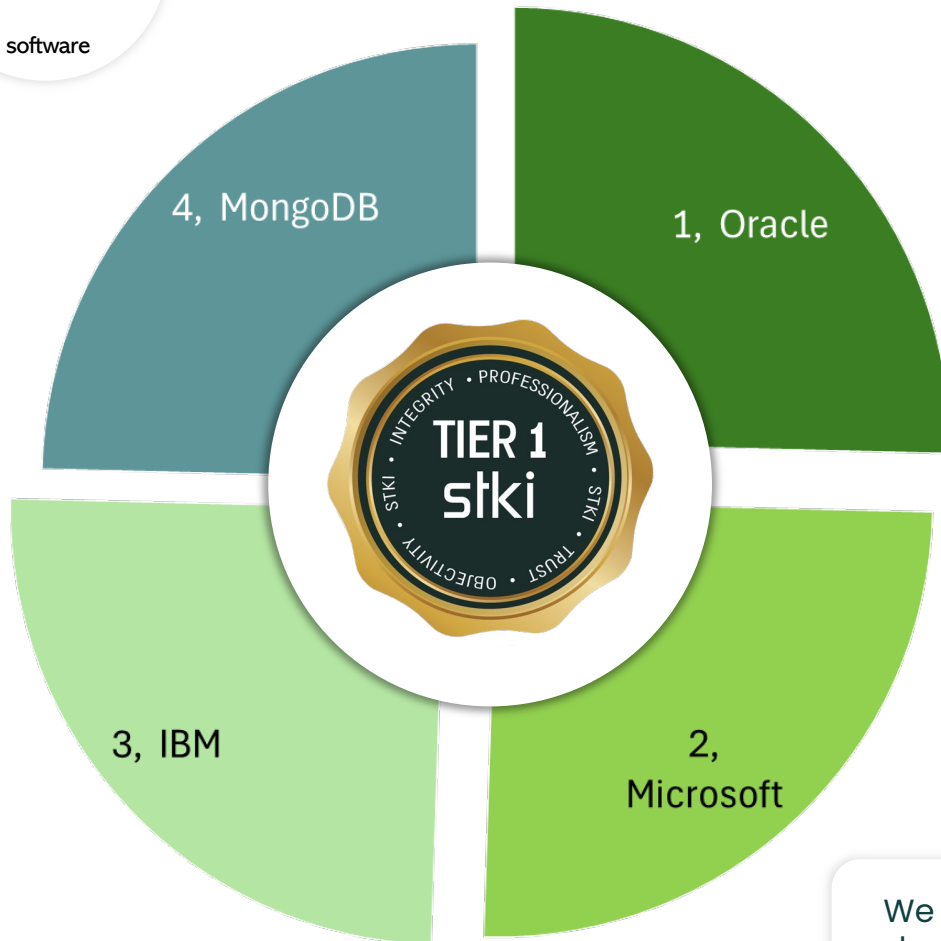


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Data Platforms (SQL, NoSQL, dbms)



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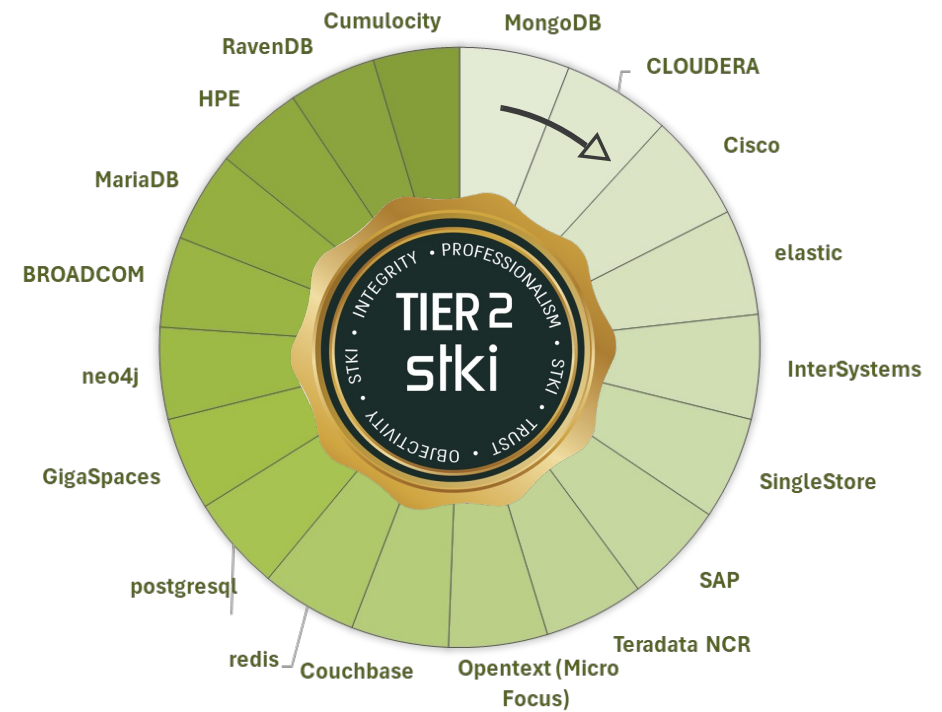


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Data Platforms (SQL, NoSQL, dbms) Cloud-based



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Middleware Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
App\WEB Server, Emulation, BRMS APaaS Integration Streaming IPaaS	60.5	4.13%	63	3.17%	65	-4.62%	62	12.90%	70	15.71%	81	13.58%	92	14.13%	105
TOTALS	60.5	4.13%	63	3.17%	65	-4.62%	62	12.90%	70	15.71%	81	13.58%	92	14.13%	105



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Values in Million USD



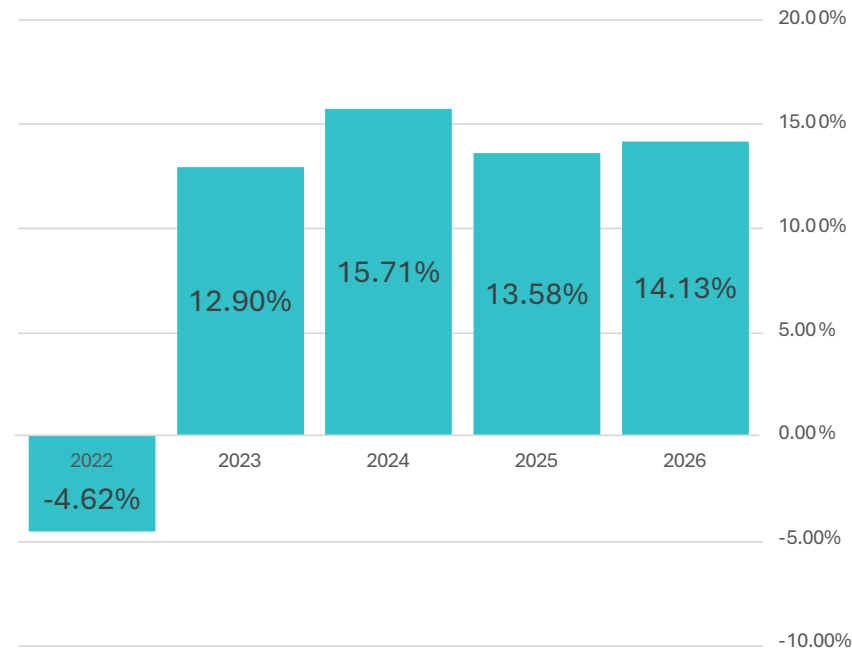
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Middleware Tools Market 2022-2026

App\WEB Server, Emulation, , BRMS APaaS
(container platforms) Integration Streaming
IPaaS



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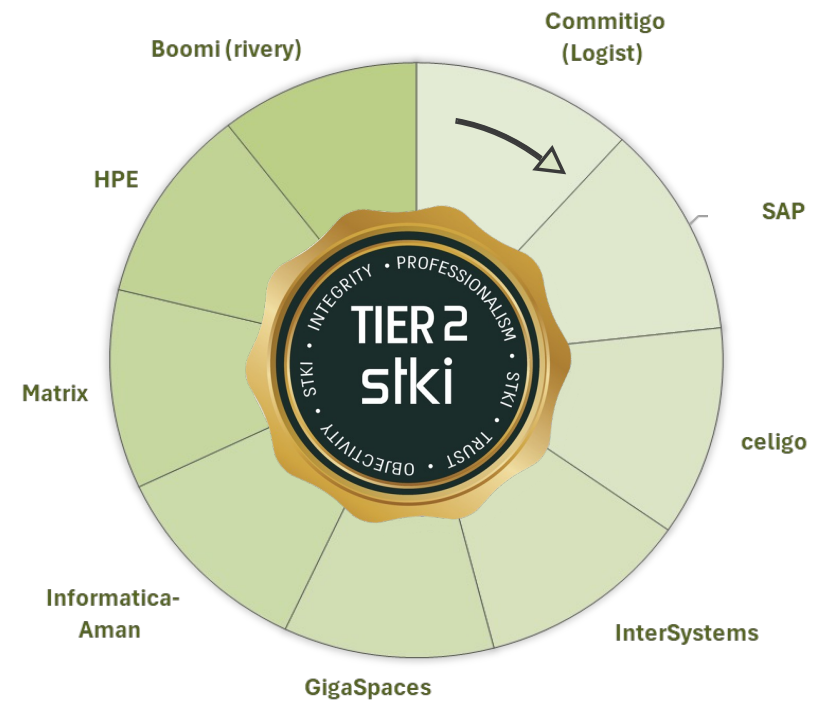
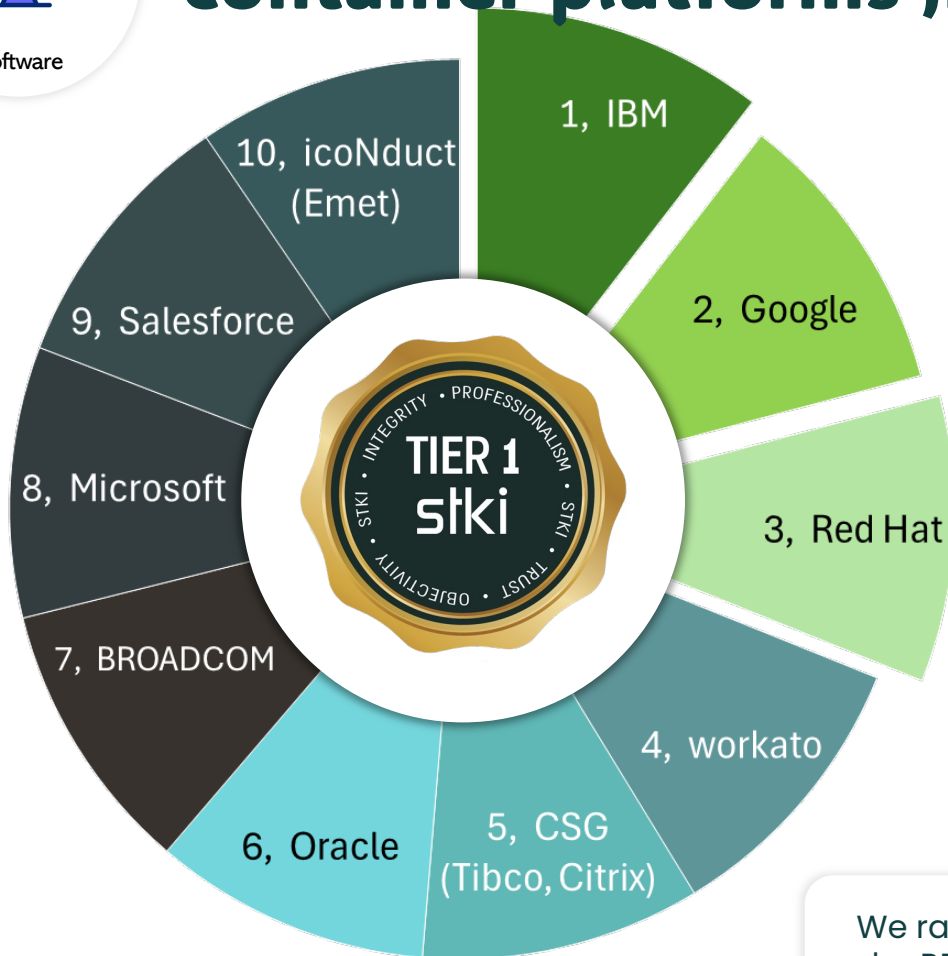


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App\WEB Server, Emulation, BRMS, APaaS, container platforms ,Integration Streaming: VENDORS



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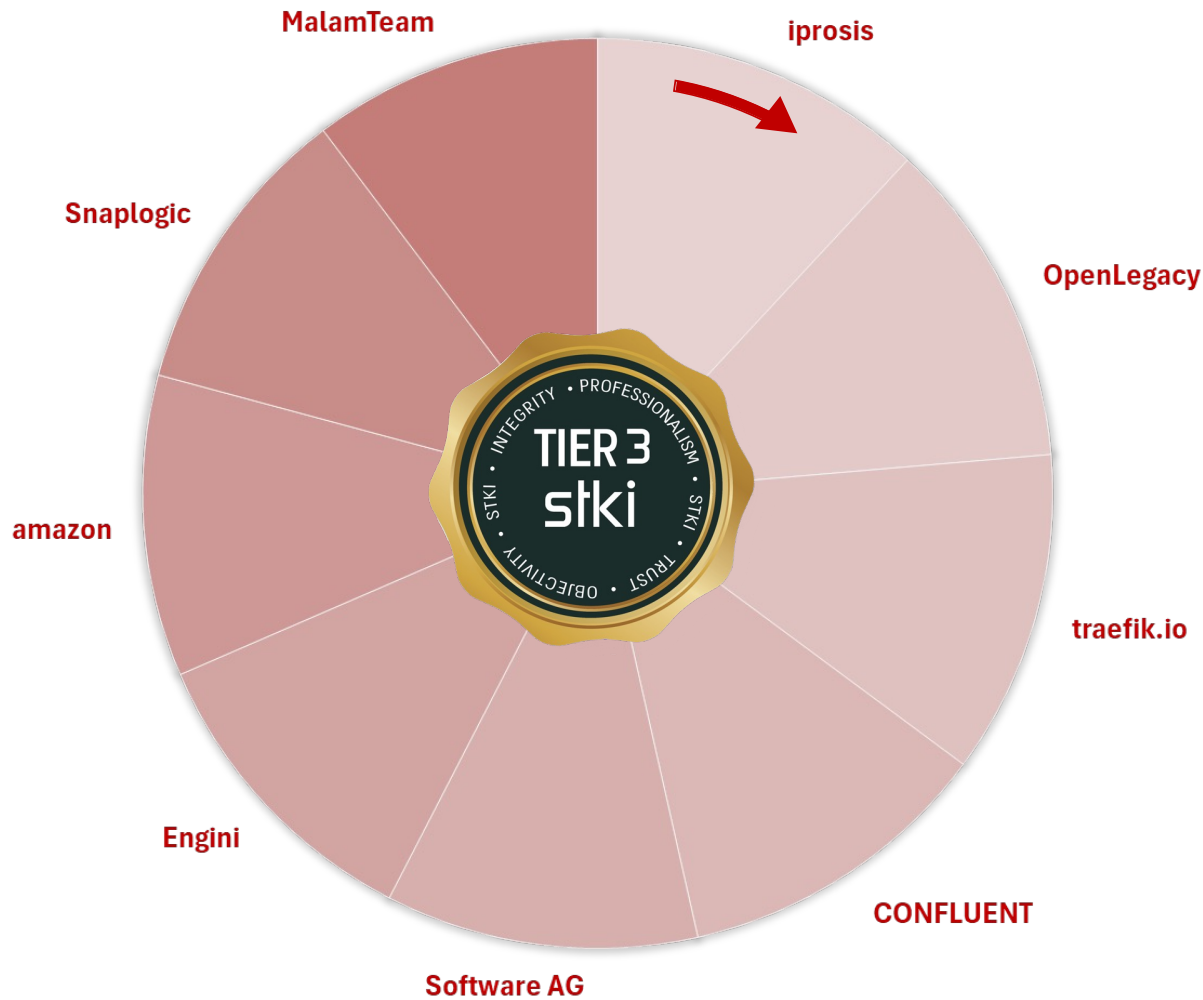
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App\WEB Server, Emulation, BRMS, APaaS, container platforms Integration Streaming: VENDORS



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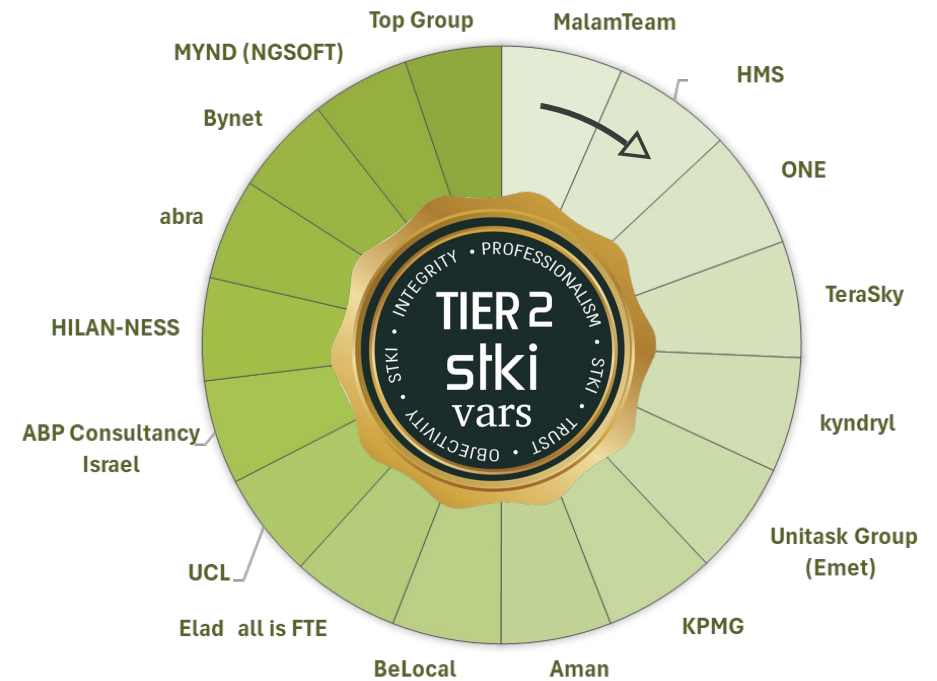


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App\WEB Server, Emulation, BRMS, APaaS, container platforms ,Integration Streaming VARs



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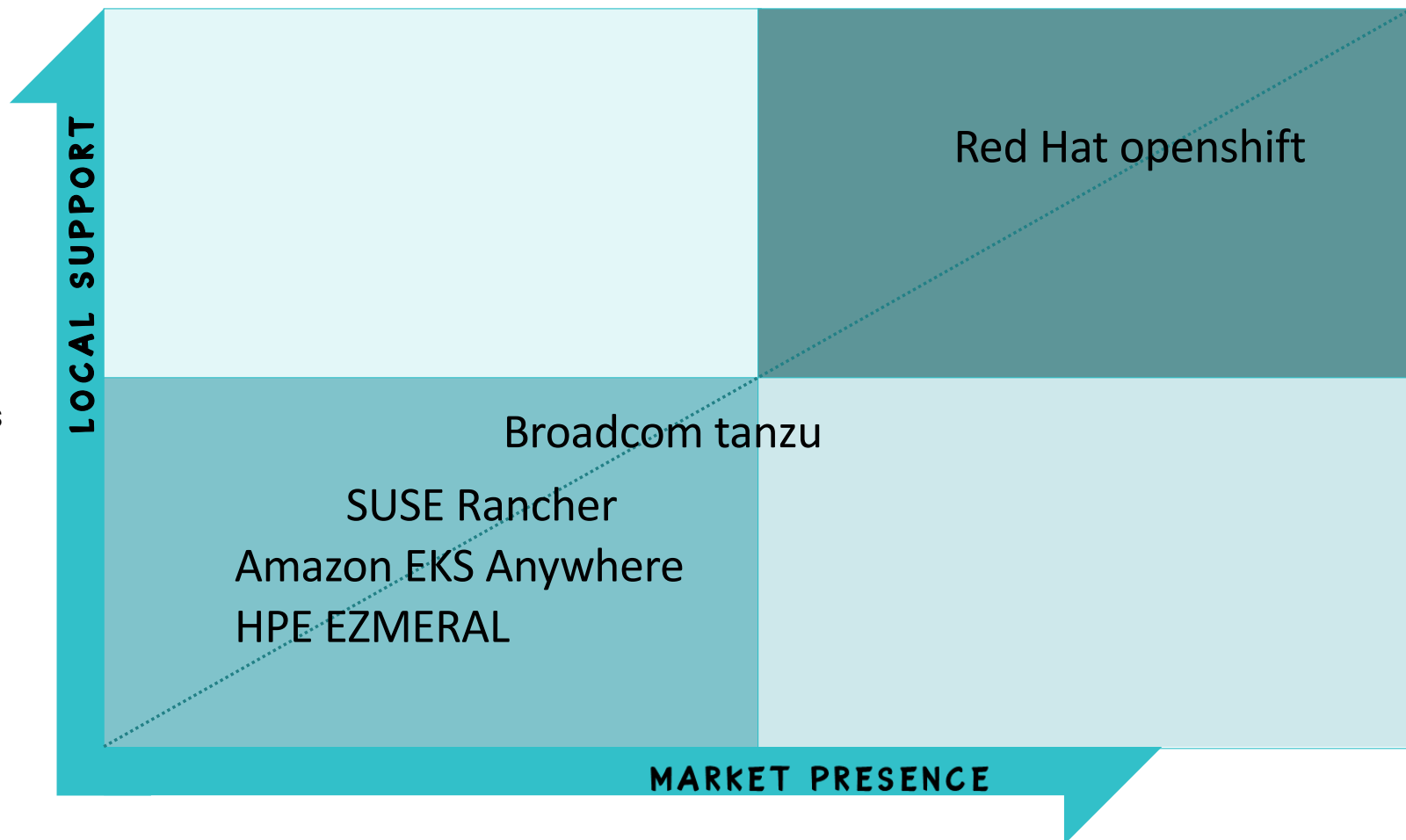


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Israel enterprise on premise (+cloud) container platform market presence 2025



Google-Anthos



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IT Management & Operations Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
IT (+cloud) Operations, Asset Management, APM, AIOps Monitoring, Workload- Scheduling ITSM, Service Desk	102	-1.96%	100	7.00%	107	-6.54%	100	5.00%	105	4.76%	110	4.55%	115	4.35%	120
FinOps tools					5	20.00%	6	33.33%	8	12.50%	9	22.22%	11	27.27%	14
TOTALS	102	-1.96%	100	12.00%	112	-5.36%	106	6.60%	113	5.31%	119	5.88%	126	6.35%	134



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Values in Million USD

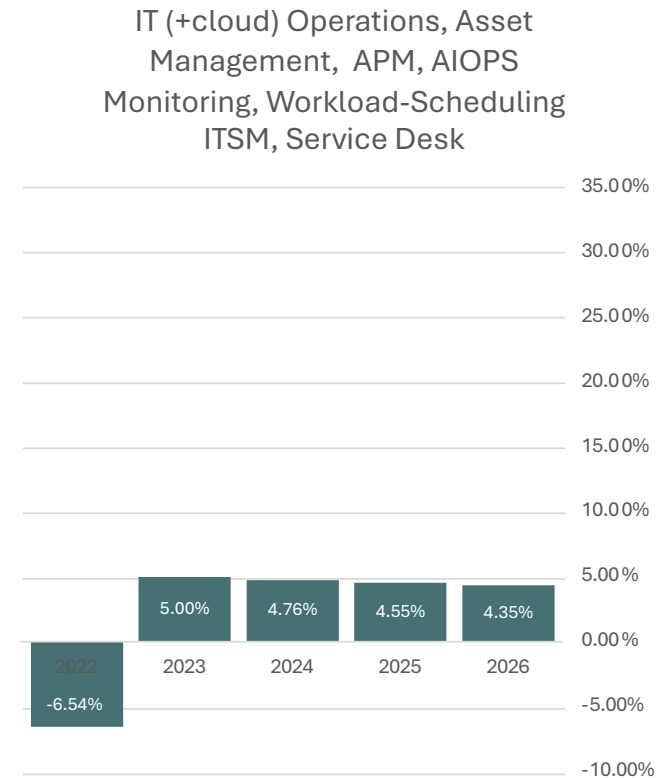
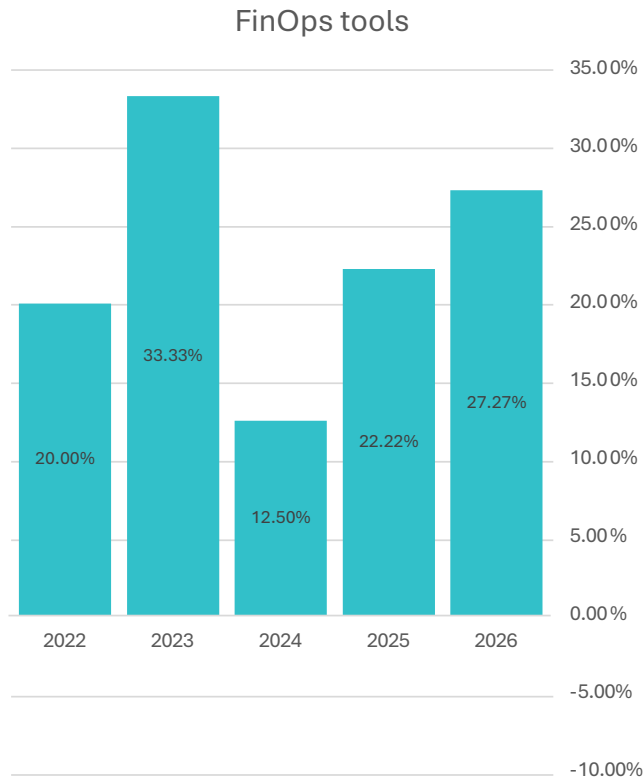


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IT Management & Operations Tools Market 2022-2026



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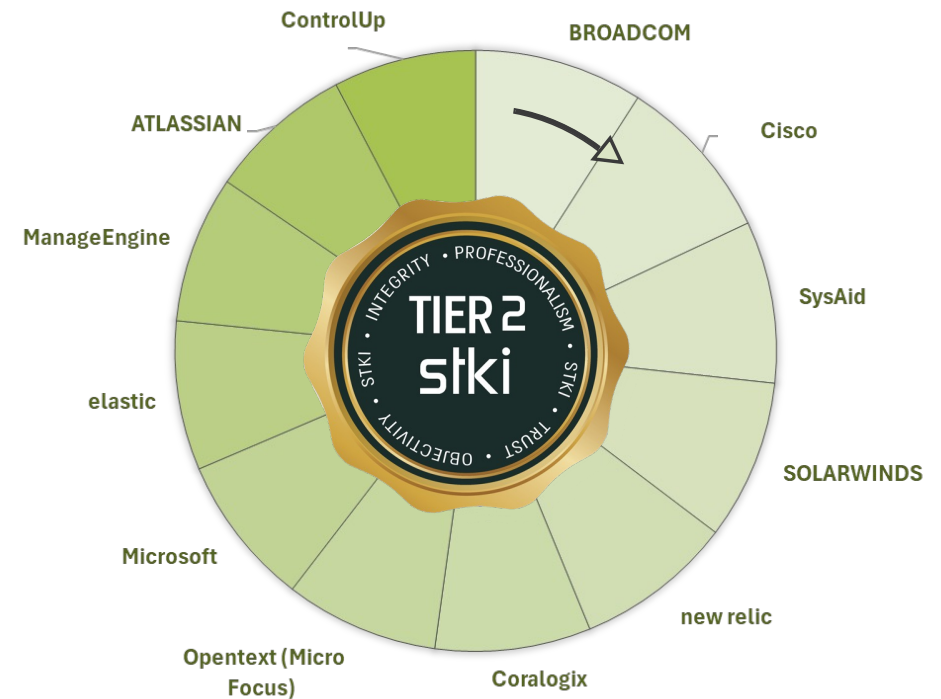


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IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ITSM, Service Desk VENDORS



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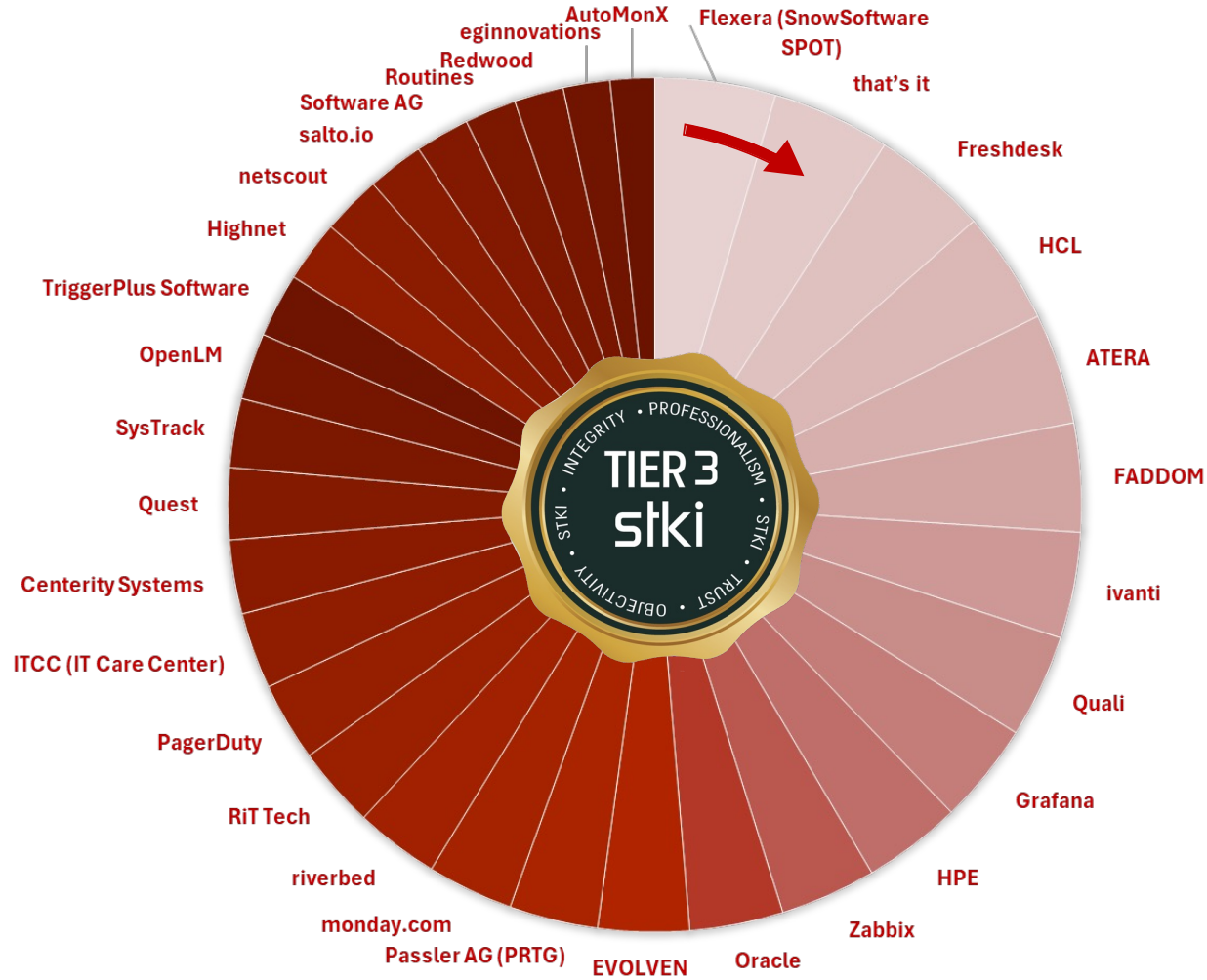
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IT Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ITSM, Service Desk VENDORS



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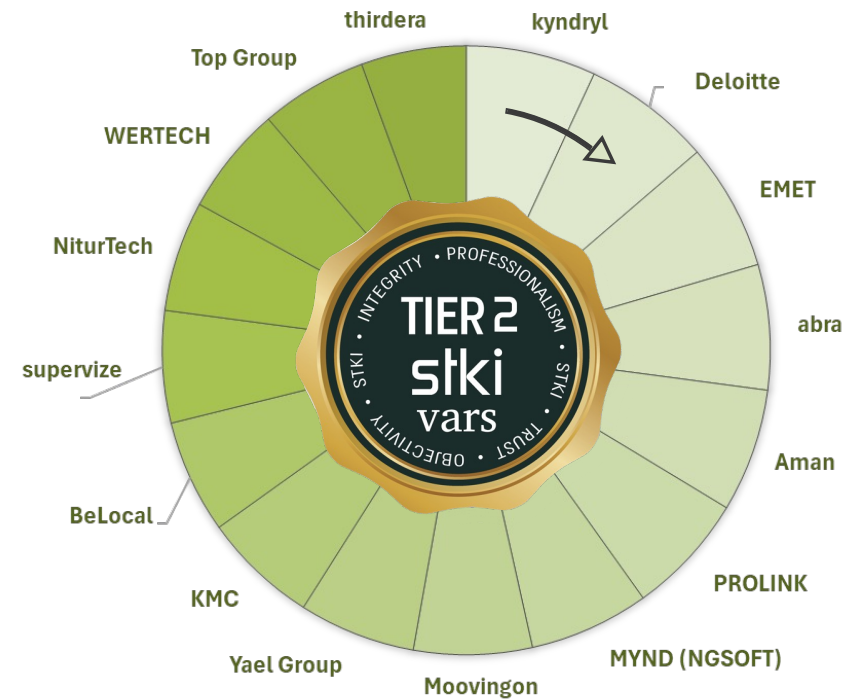


software

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



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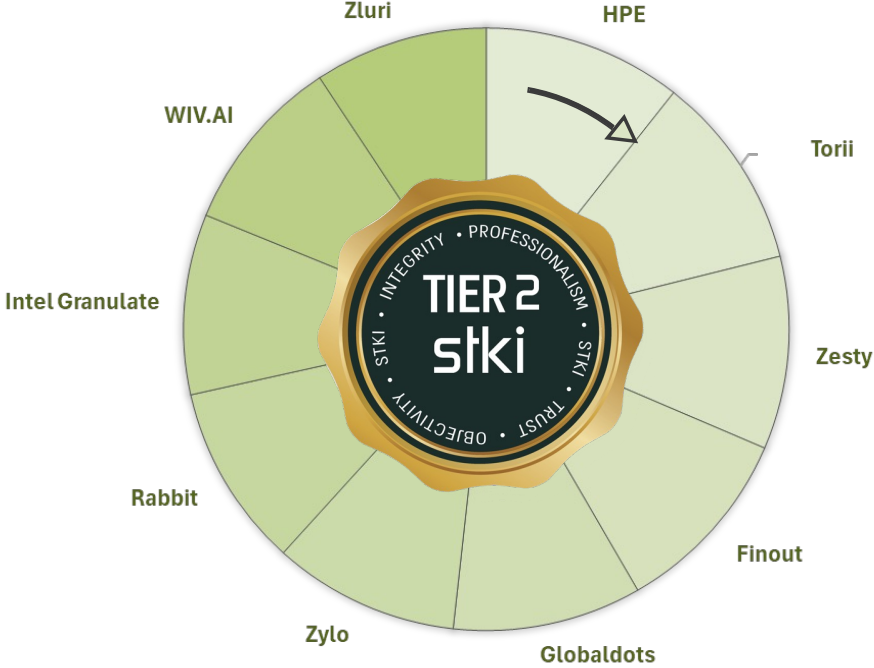
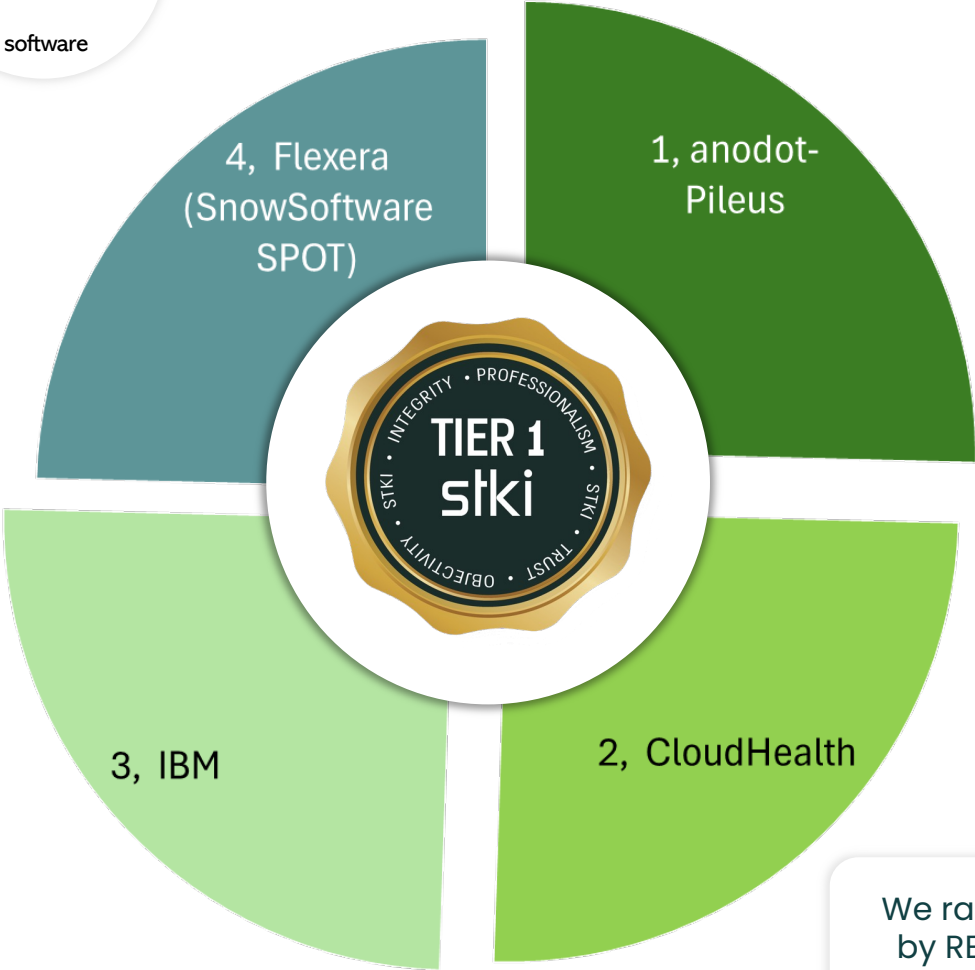


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FinOps Tools



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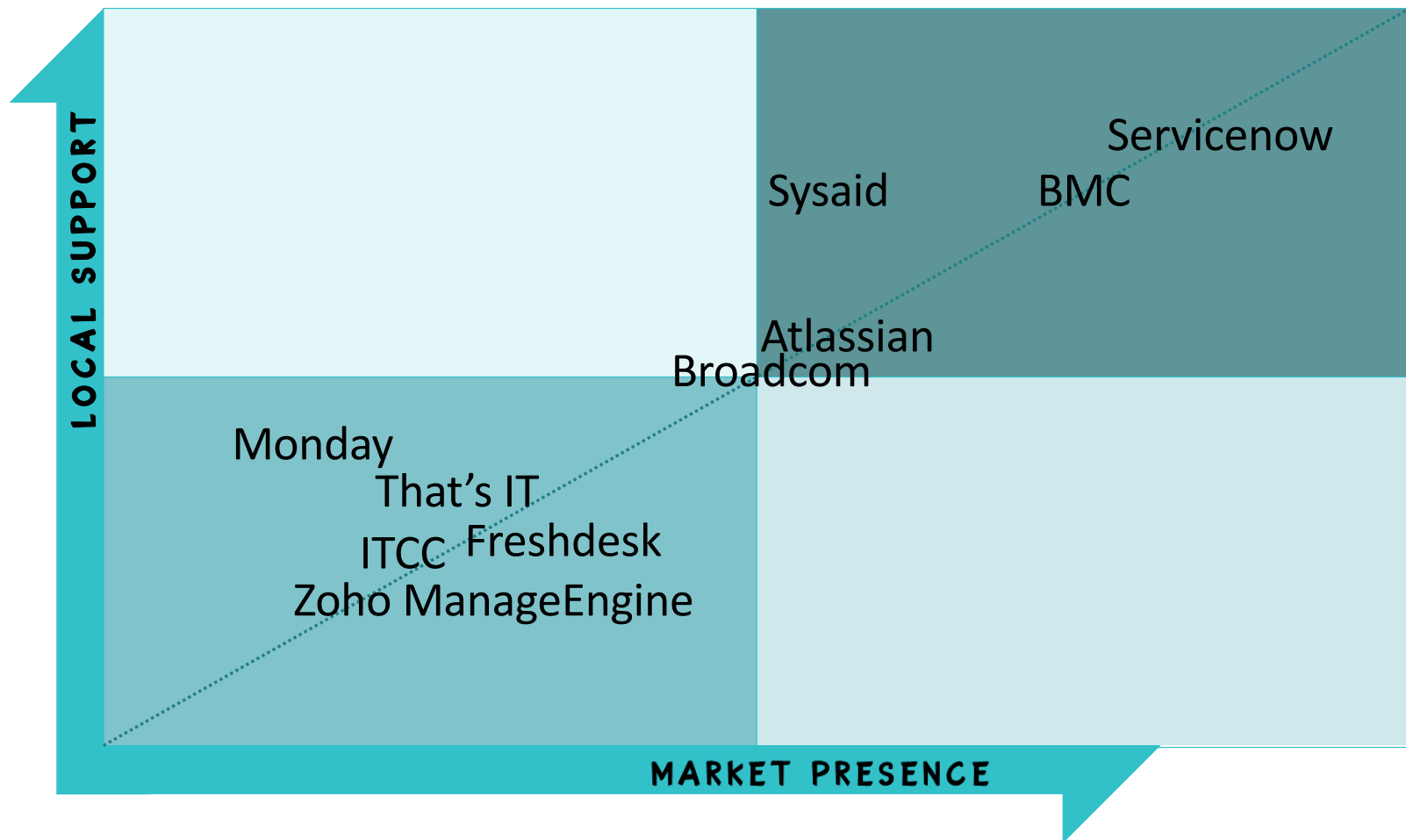
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Israel ITSM (Help Desk Tools) market presence 2025



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Israel enterprise Observability (monitoring) market presence 2025



HPE - Opsamp

LOCAL SUPPORT

Faddom Coralogix
Opentext Solarwinds
Elastic ServiceNow
Broadcom IBM
New Relic
PRTG Riverbed
Centerity HCL
ManageEngine
Cloudfabrix eG Innovations

Dynatrace

Cisco (+splunk)

Datadog

IBM

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

MARKET PRESENCE



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V2

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Israel enterprise job scheduling market presence 2025

Vendor

BMC

Broadcom

IBM/HCL

Redwood

Product

Control-M

Automic

IBM/HCL workload manager

RunMyJobs

Israeli Rep.

BMC

Broadcom Israel

IBM

Supervize

Integrators

Matrix

Ness Pro

Matrix, Emet

Supervize



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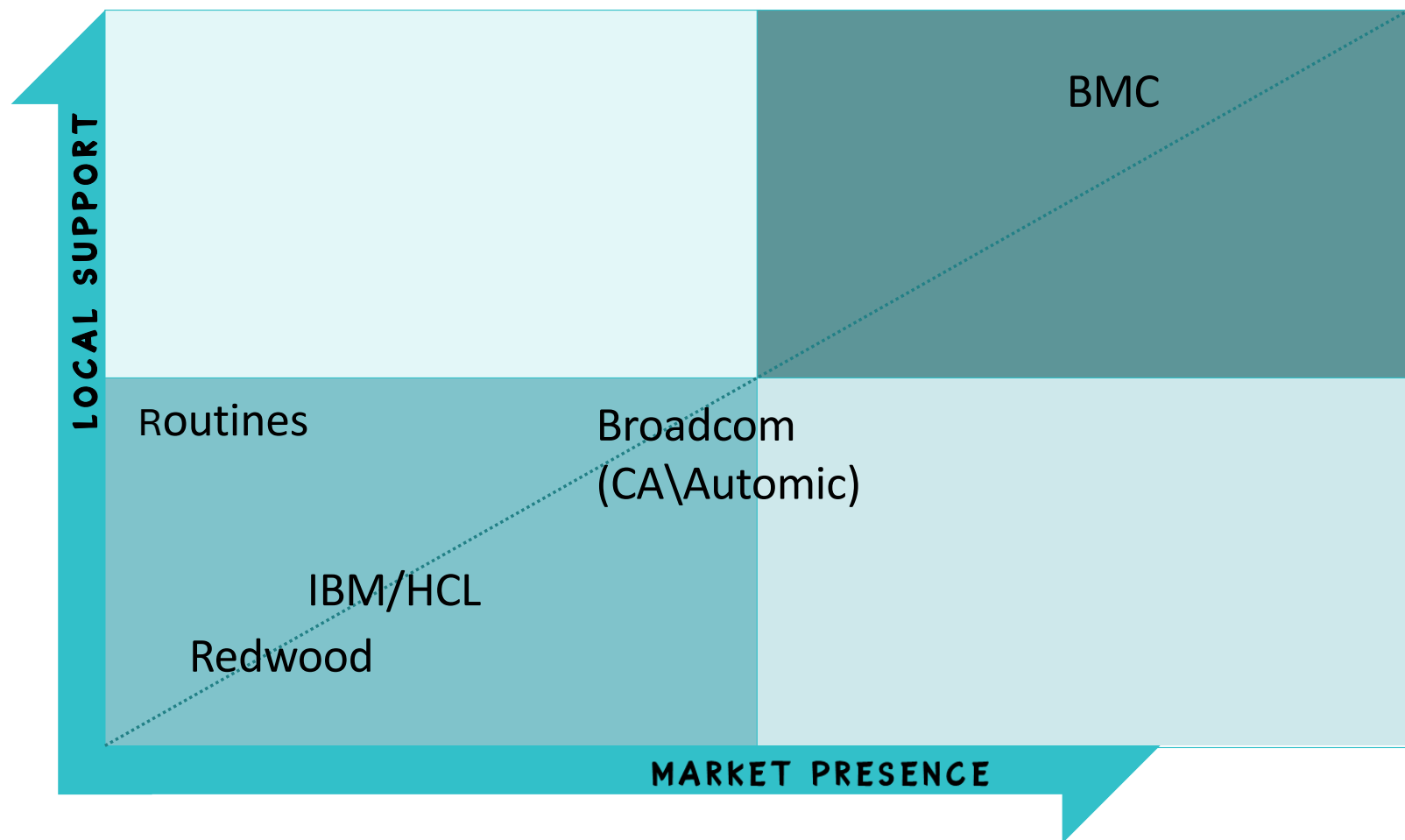


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Israel enterprise job scheduling and tech orchestration brands market presence 2025



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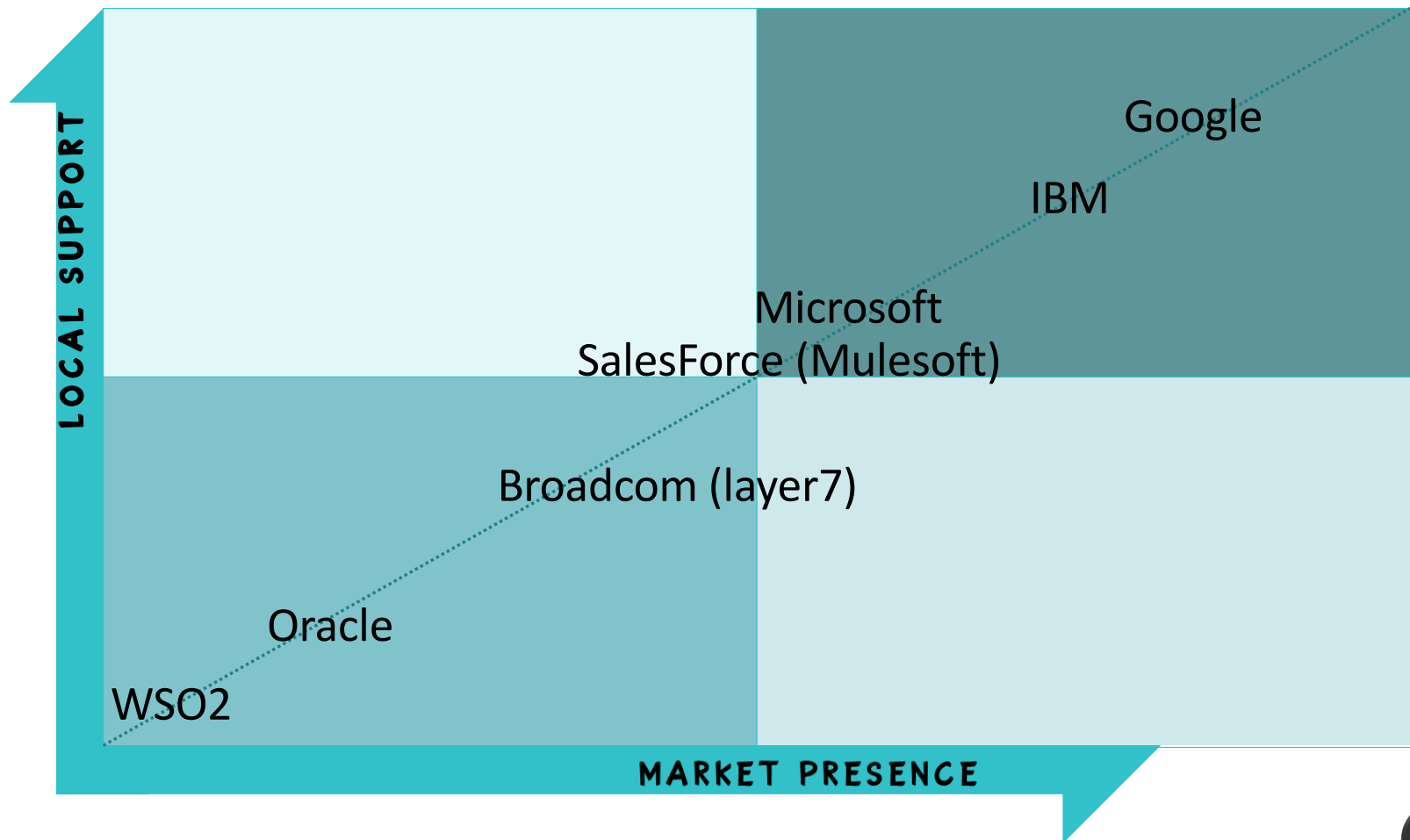
V2

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Brands in API Management (with on premise option) - market enterprise presence 2025



Tyk
KONG
Talend Cloud
Traefik.io



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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, HMC ProceedTech

Tibco

Mashary

Yael

Redhat 

3Scale

Redhat Israel

Matrix

Broadcom

Layer7

Ness Pro

Ness Pro, Emet

SoftwareAG

WebMethods API mng.

SoftwareAG Israel

Tyke

EL-AZ

Salesforce

Mulesoft

Salesforce Israel

Many SF integrators



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Open source

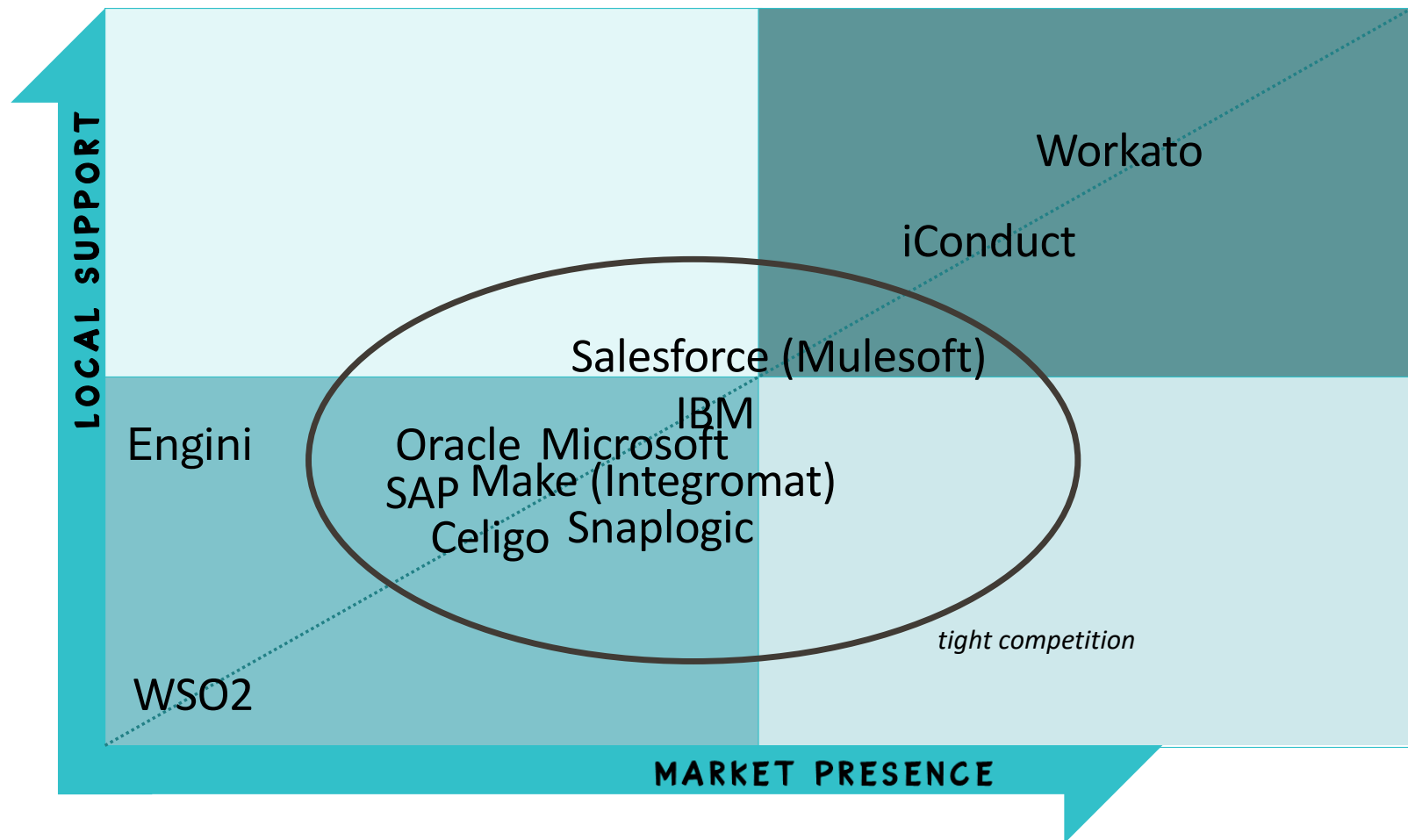
V2

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Brands in ESB - Israeli market presence 2025



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V2

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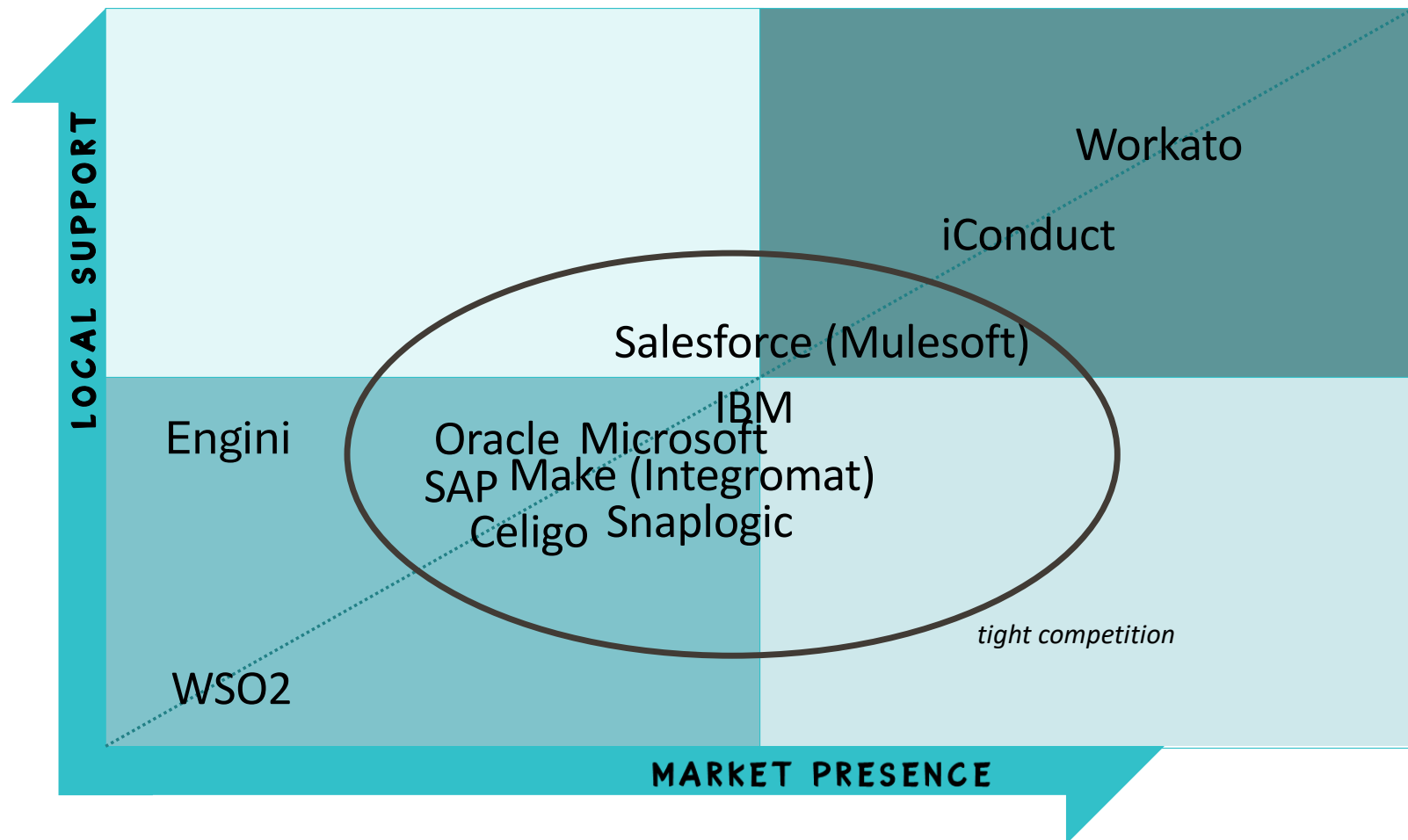


software

Brands in iPaaS - Israeli market enterprise presence 2025



Google



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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

Redhat

Fuse

Redhat Israel

Matrix

Workato

Workato

Workato Israel

EladCRM, Deloitte Digital, Malam
Team, Allcloud, Yael, 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, HMS ProceedTech



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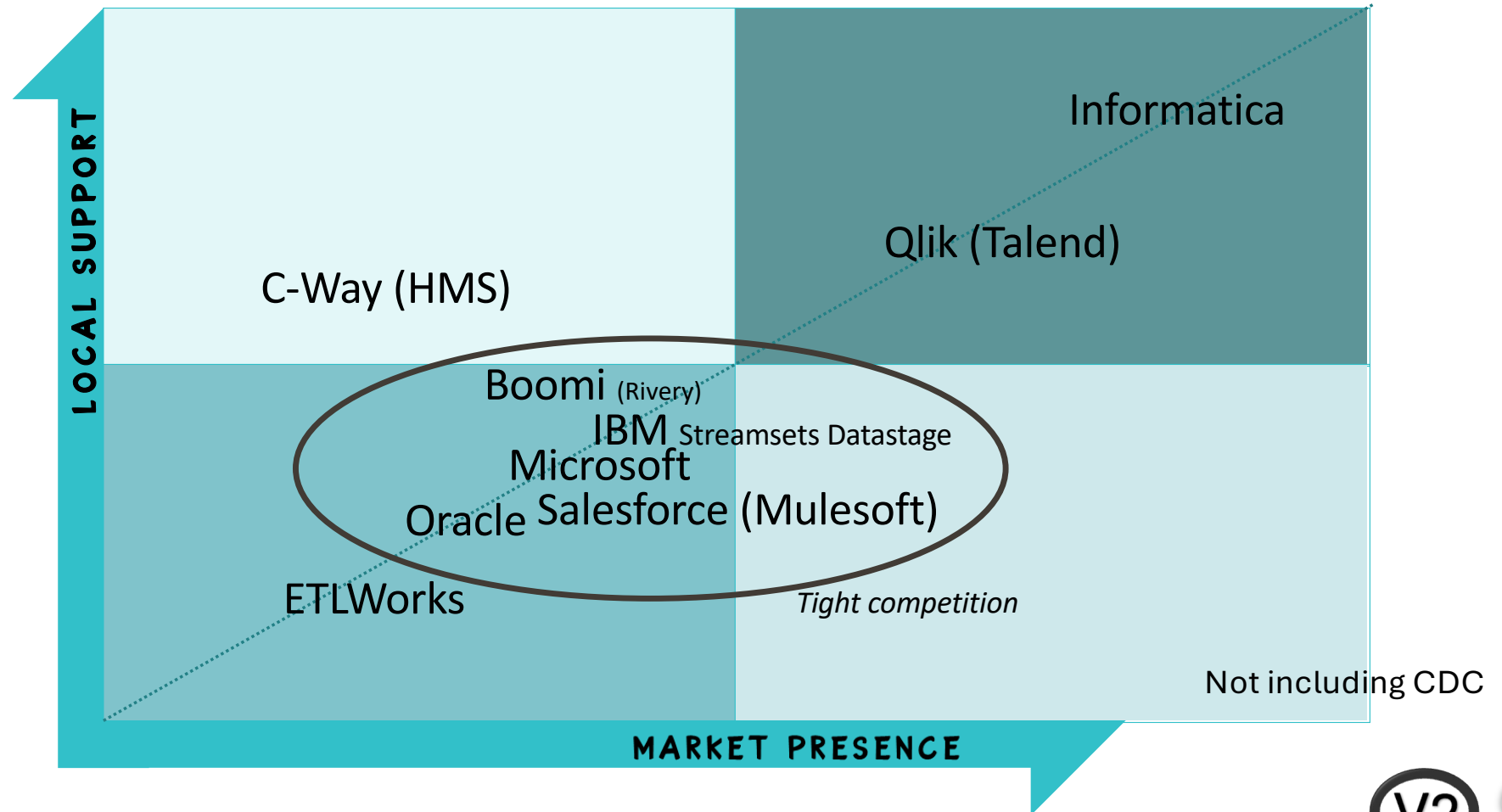


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Brands in ETL (Extract Transform Load) - market enterprise presence 2025



Equalum
bigbi.io
Snaplogic



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Israeli ETL selected integrators

Vendor	Product	Israeli Rep.	Integrators
Informatica	Informatica	Informatica Israel	Aman Matrix
Qlik	Talend Integration		Smartstreams Yael, QLIK
Rivery	Rivery ETL	Twingo	
IBM	Datastage	IBM Israel	Malam, IBM, Yael and more
Bigbi.io	bigbi.io		SQLINK
Snaplogic	Snaplogic		One , HMS ProceedTech
HMS	C-Way		



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Security (Cyber) Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Endpoint related tools	53	3.77%	55	3.64%	57	3.51%	59	5.08%	62	6.45%	66	6.06%	70	5.71%	74
Network\Web cloud services	88	4.55%	92	7.61%	99	3.03%	102	3.92%	106	4.72%	111	5.41%	117	5.98%	124
data content related tools	37	5.41%	39	5.13%	41	4.88%	43	6.98%	46	10.87%	51	11.76%	57	12.28%	64
cyber management tools	36	2.78%	37	5.41%	39	6.41%	41.5	13.25%	47	12.77%	53	13.21%	60	11.67%	67
Zero Trust including identity, access, SDP software defined perimeter, SASE ID M, Access	22	4.55%	23	8.70%	25	8.00%	27	11.11%	30	16.67%	35	17.14%	41	14.63%	47
Cloud security protection tools					22	13.64%	25	12.00%	28	21.43%	34	26.47%	43	16.28%	50
Other cyber tools	12	4.17%	12.5	4.00%	13	3.85%	13.5	3.70%	14	7.14%	15	20.00%	18	16.67%	21
TOTALS	248	4.23%	258.5	14.51%	296	5.07%	311	7.07%	333	9.61%	365	11.23%	406	10.10%	447



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Values in Million USD



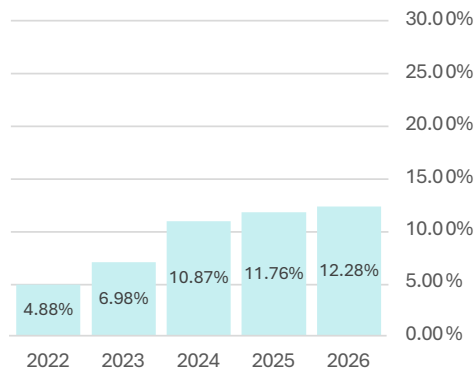
124



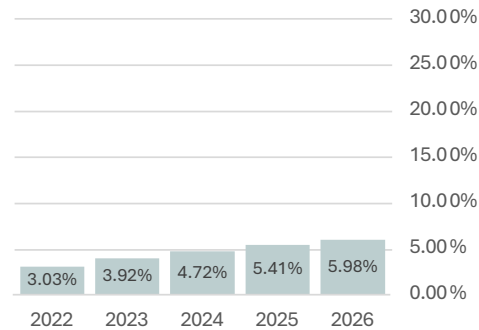
software

Security (Cyber) Tools Market 2022-2026

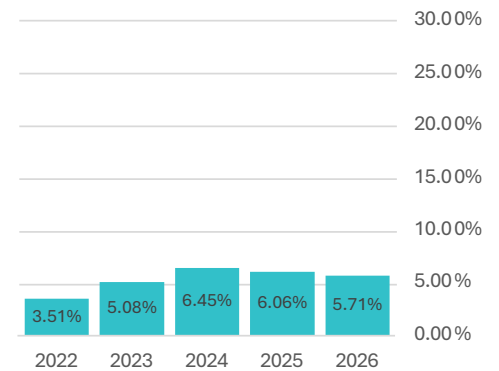
data content related tools



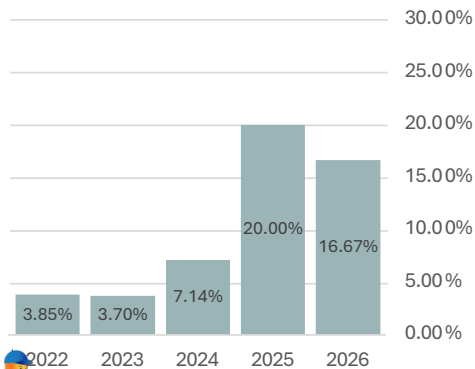
Network\Web cloud services



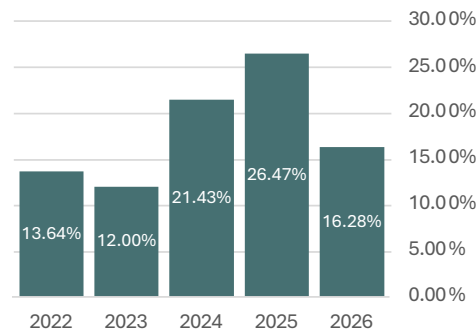
Endpoint related tools



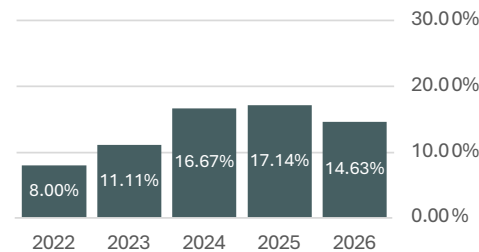
Other cyber tools



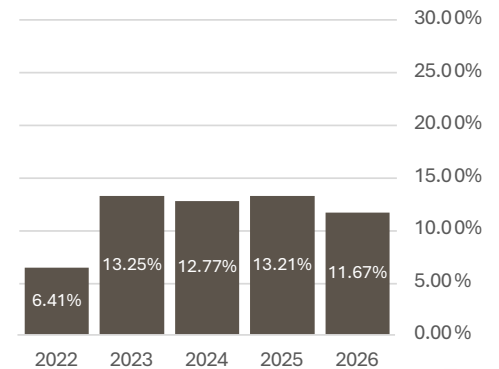
Cloud security protection tools



Zero Trust including identity, access, SDP software defined perimeter, SASE IDM, Access



cyber management tools



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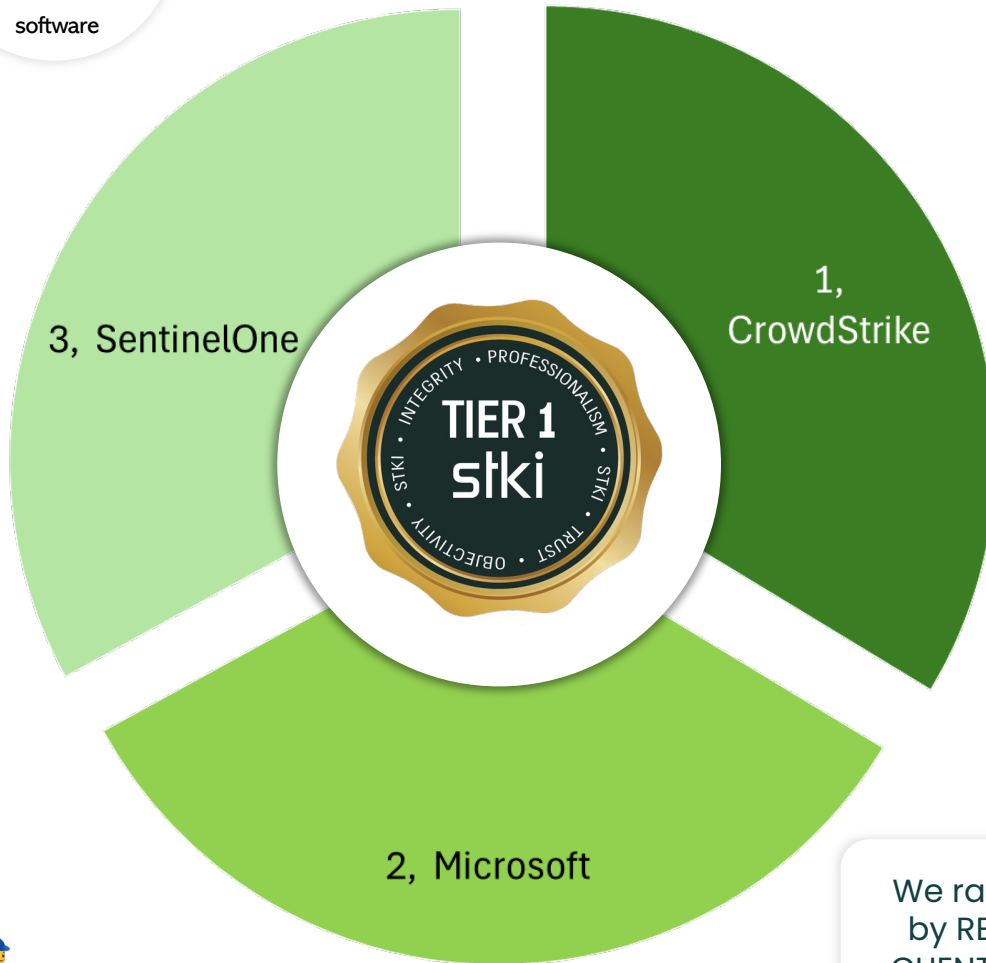


125

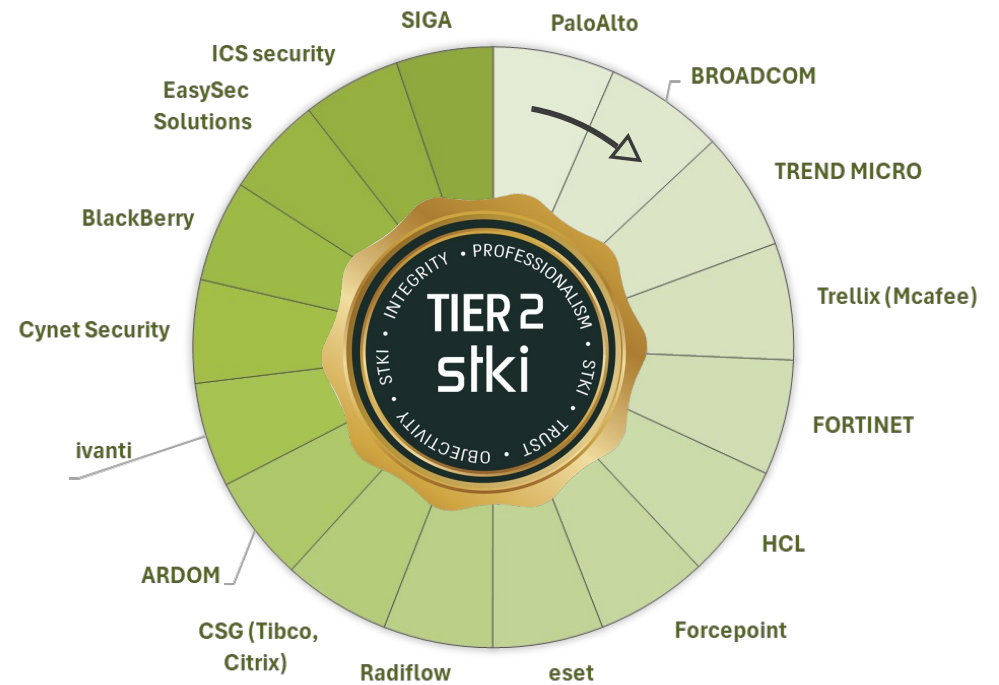
Endpoint related tools



software



We rank VENDORS
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CLIENT MINDSHARE



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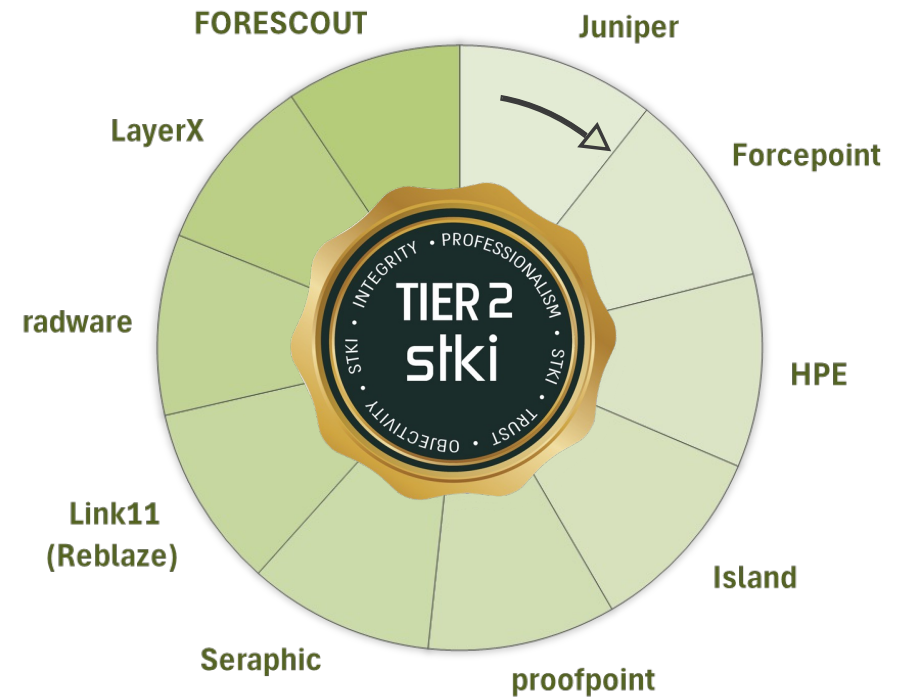
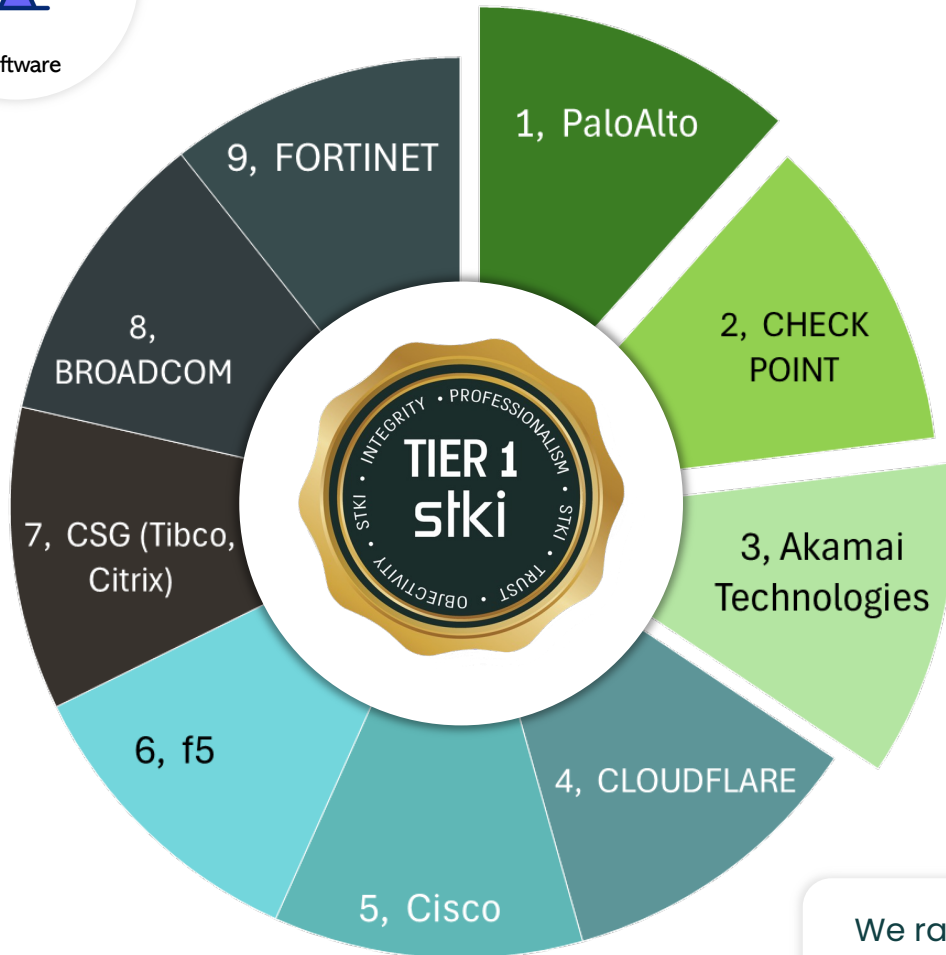


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Network\Web cloud services (FW, WAF, DDOS services, etc.)



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CLIENT MINDSHARE



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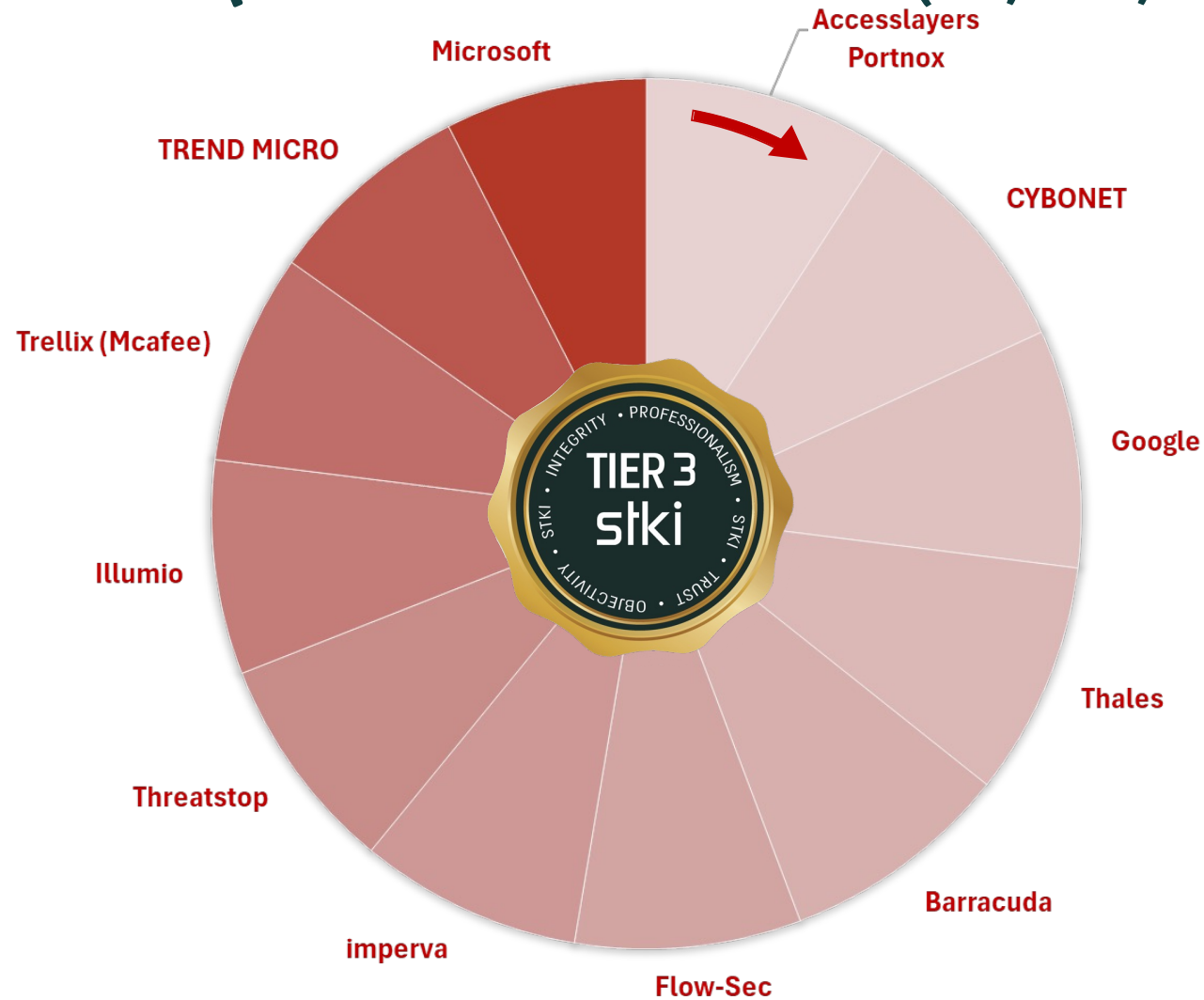
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software

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

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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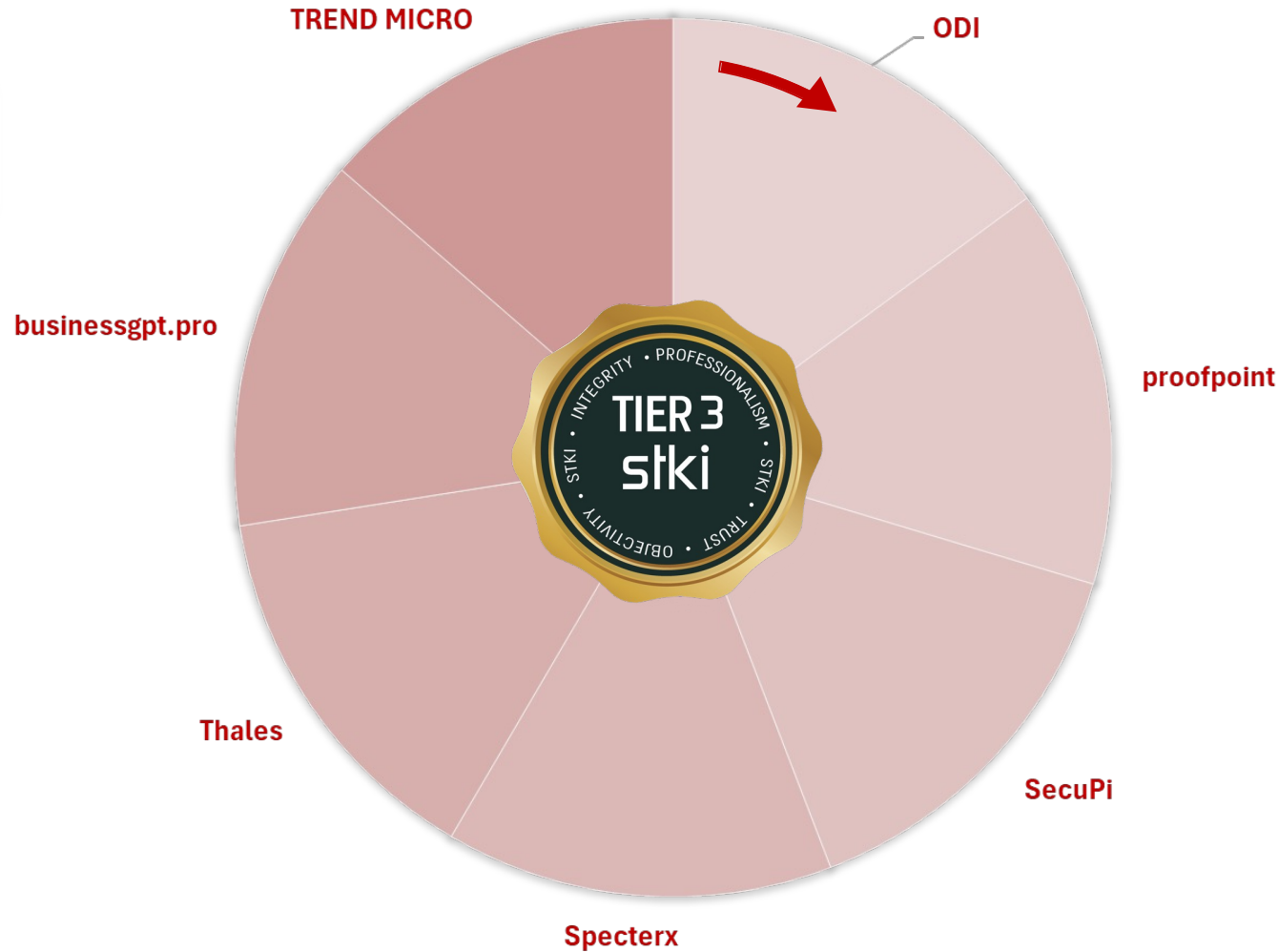
129



software

We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

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



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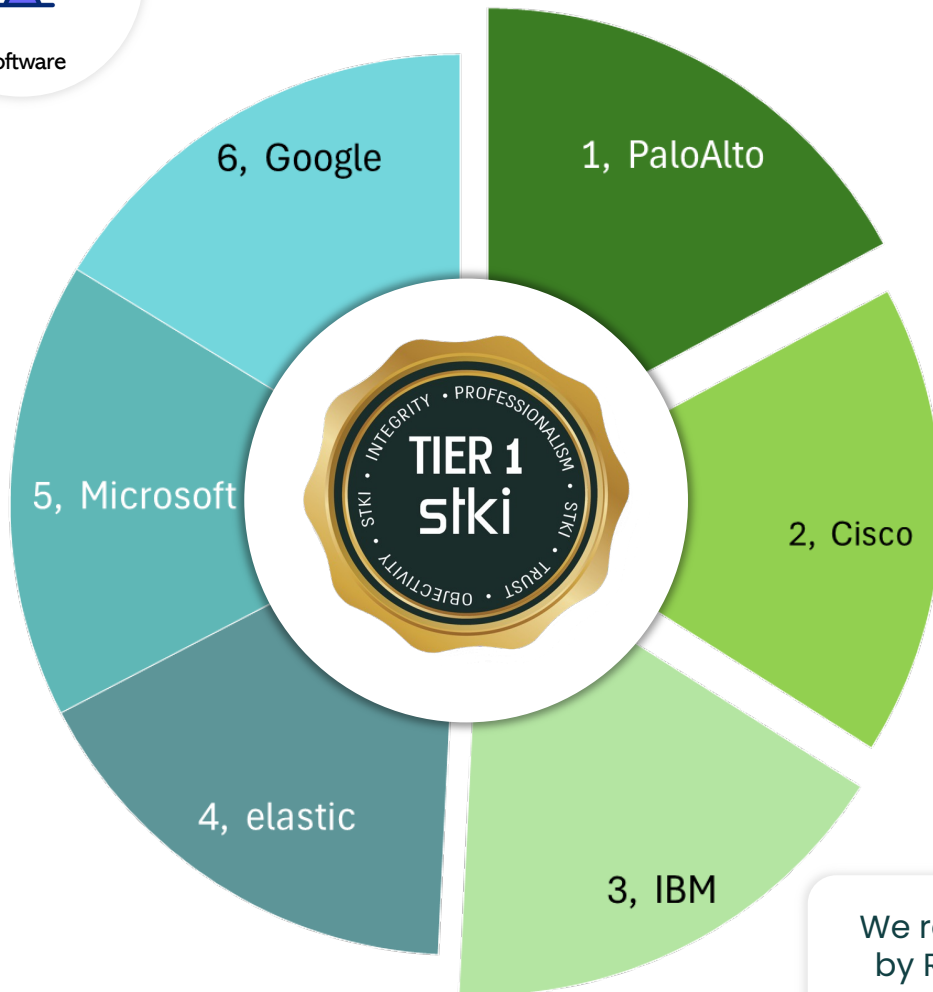


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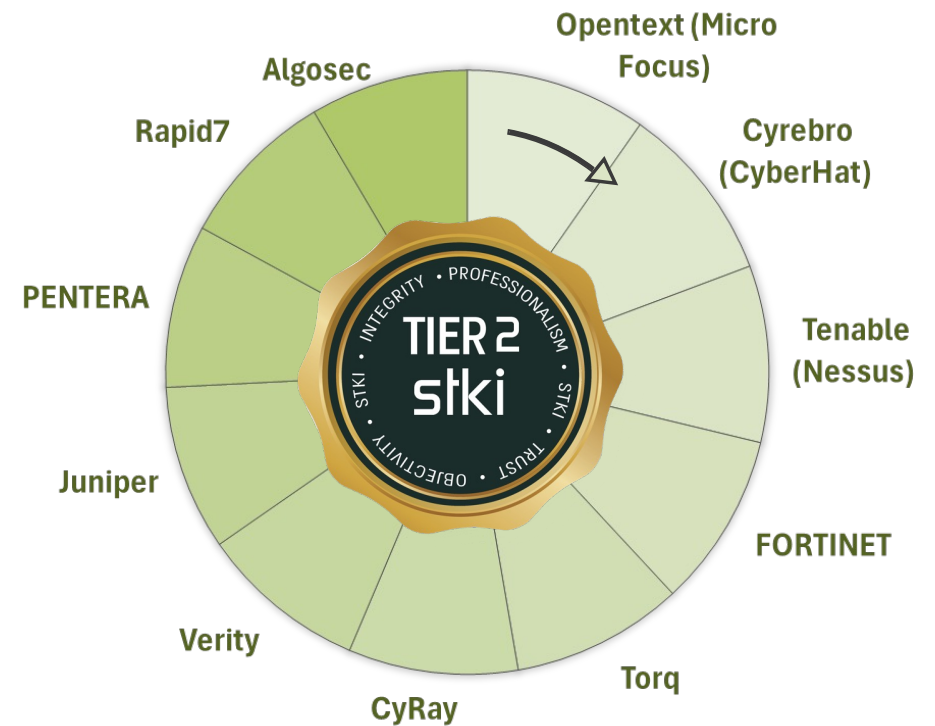


software

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



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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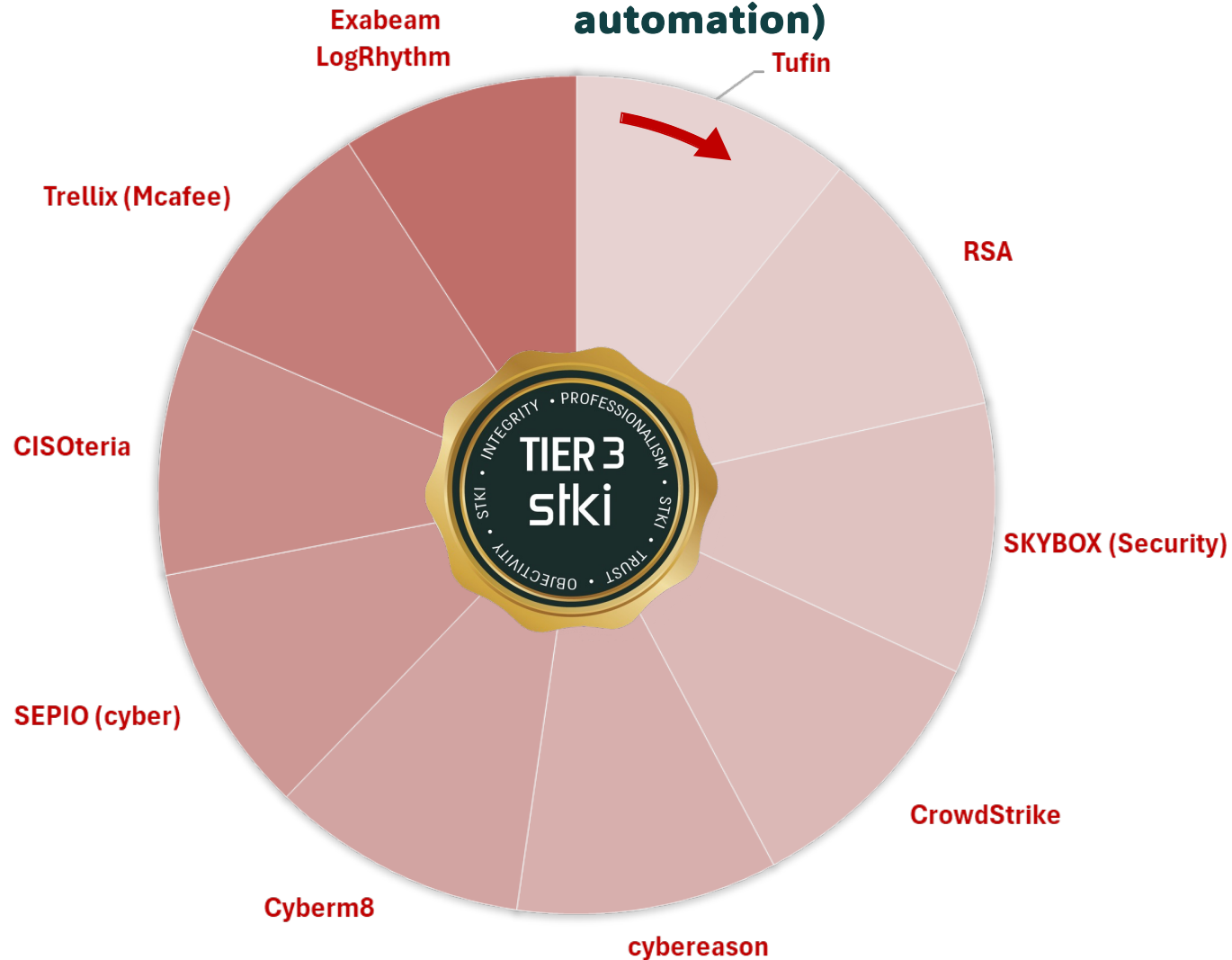
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software

We rank VENDORS
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CLIENT MINDSHARE

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



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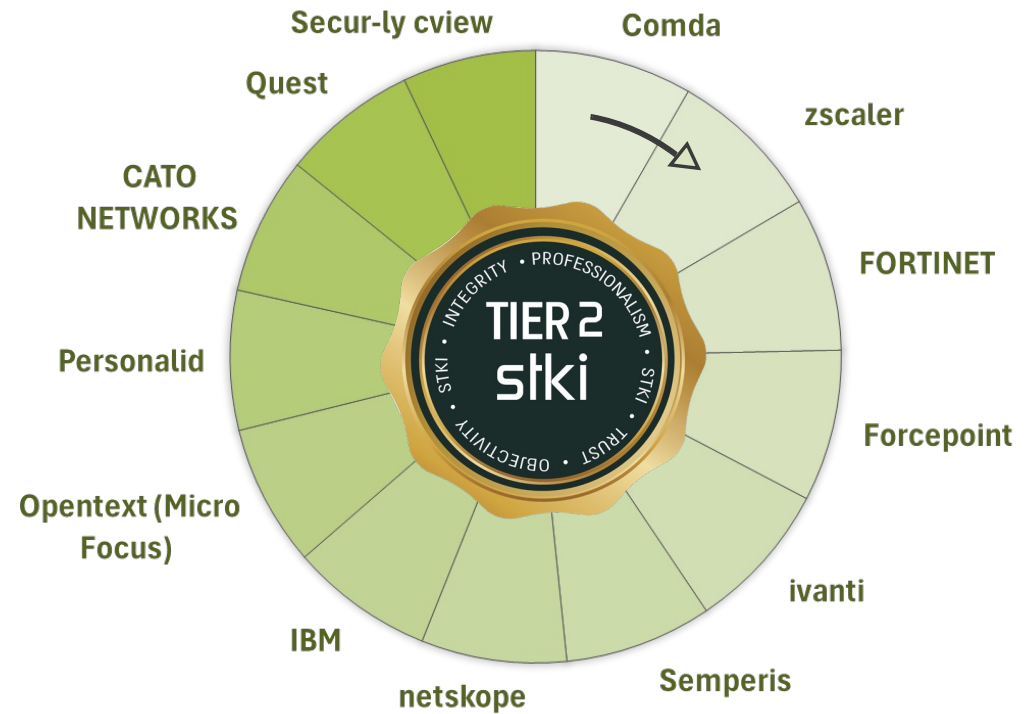
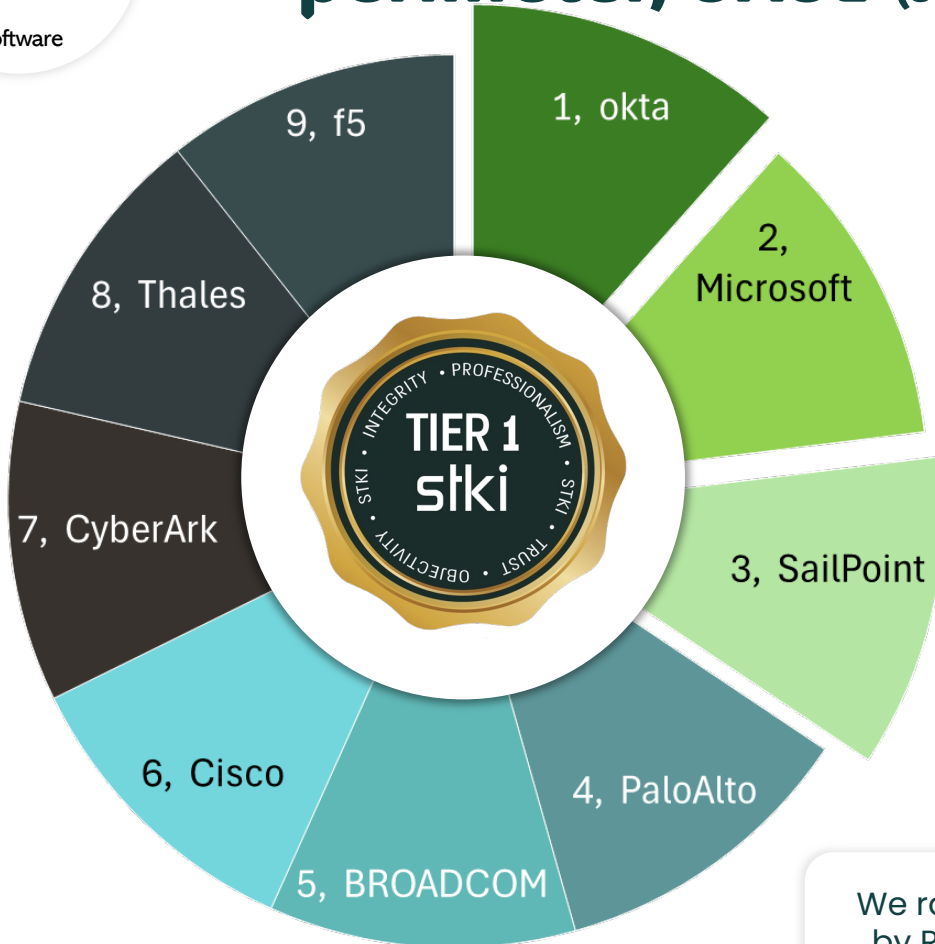


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software

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



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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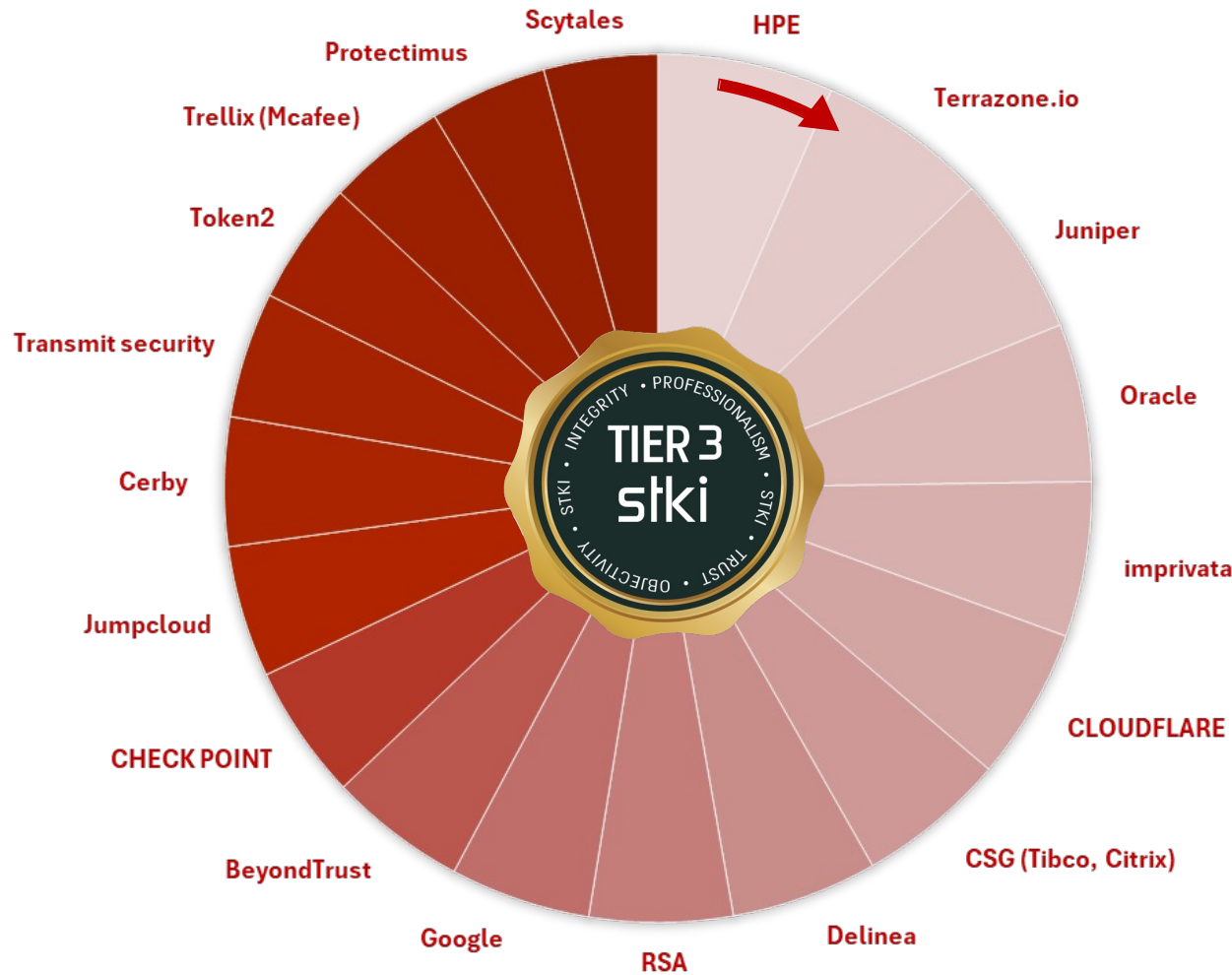
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software

We rank VENDORS
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CLIENT MINDSHARE

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



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SASE Selected Integrators-providers in Israel

Vendor	Product	Selected Integrators
Netskope	Security Service Edge	One Spider, Qmasters, Trustnet, 2B, Danet
Palo Alto	Prisma Access	Cybercom (Emet) and many more
Cloudflare	Cloudflare's SSE & SASE Platform	Matrix
Zscaler	Zscaler SASE	Internet-Bynet We-Ankor
Checkpoint	Perimeter81	(lots)
Broadcom	Symantec SASE	Ness 2bsecure, Cellcom , spider, Trustnet , Malam and Bulwarx
Fortinet	FortiSASE	YouCC
Forcepoint	Forcepoint SSE	Bulwarx Trustnet Spider Malam
HPE	Aruba Networking SSE	Matrix, Dorcom, IT-Guru, Gilat ,Bynet



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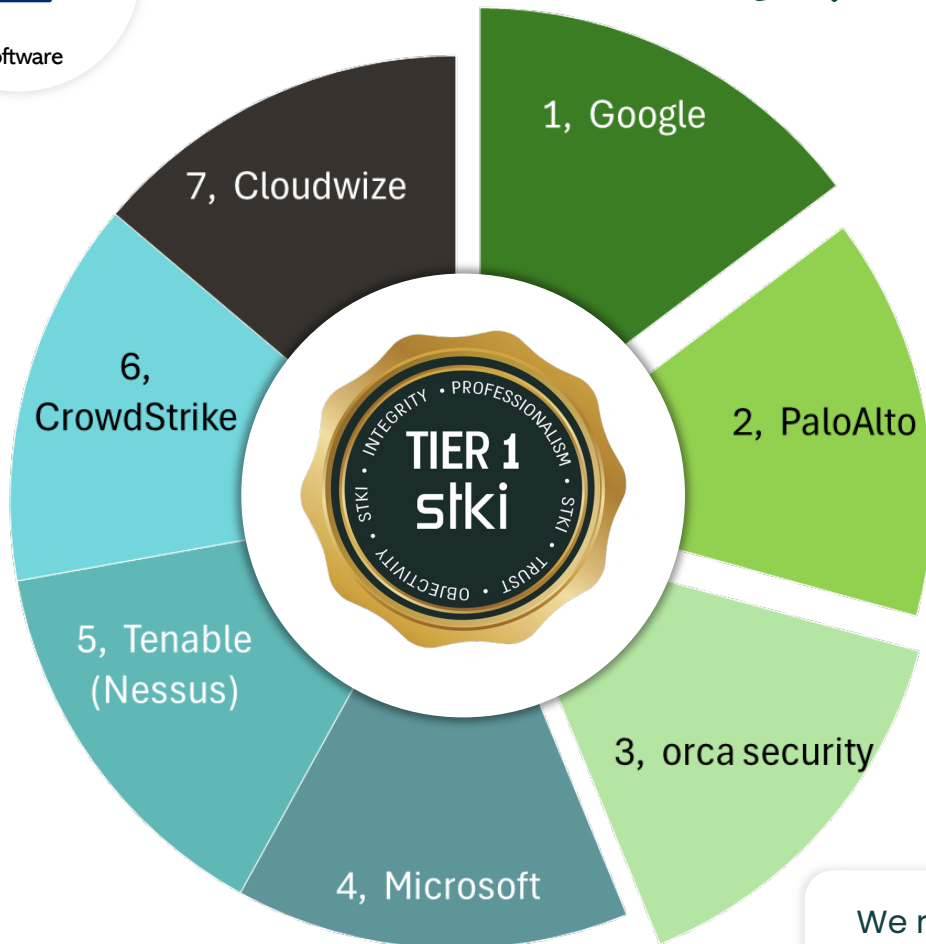


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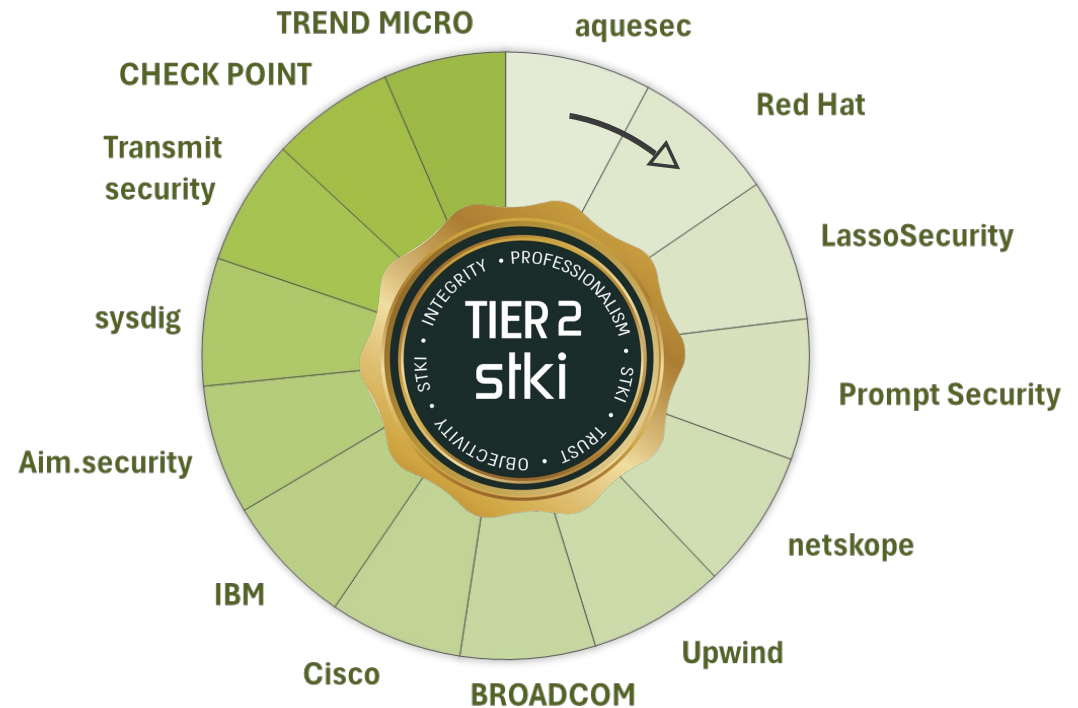


software

Cloud security protection tools (CNAPP, CSPM, CASB)



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CLIENT MINDSHARE



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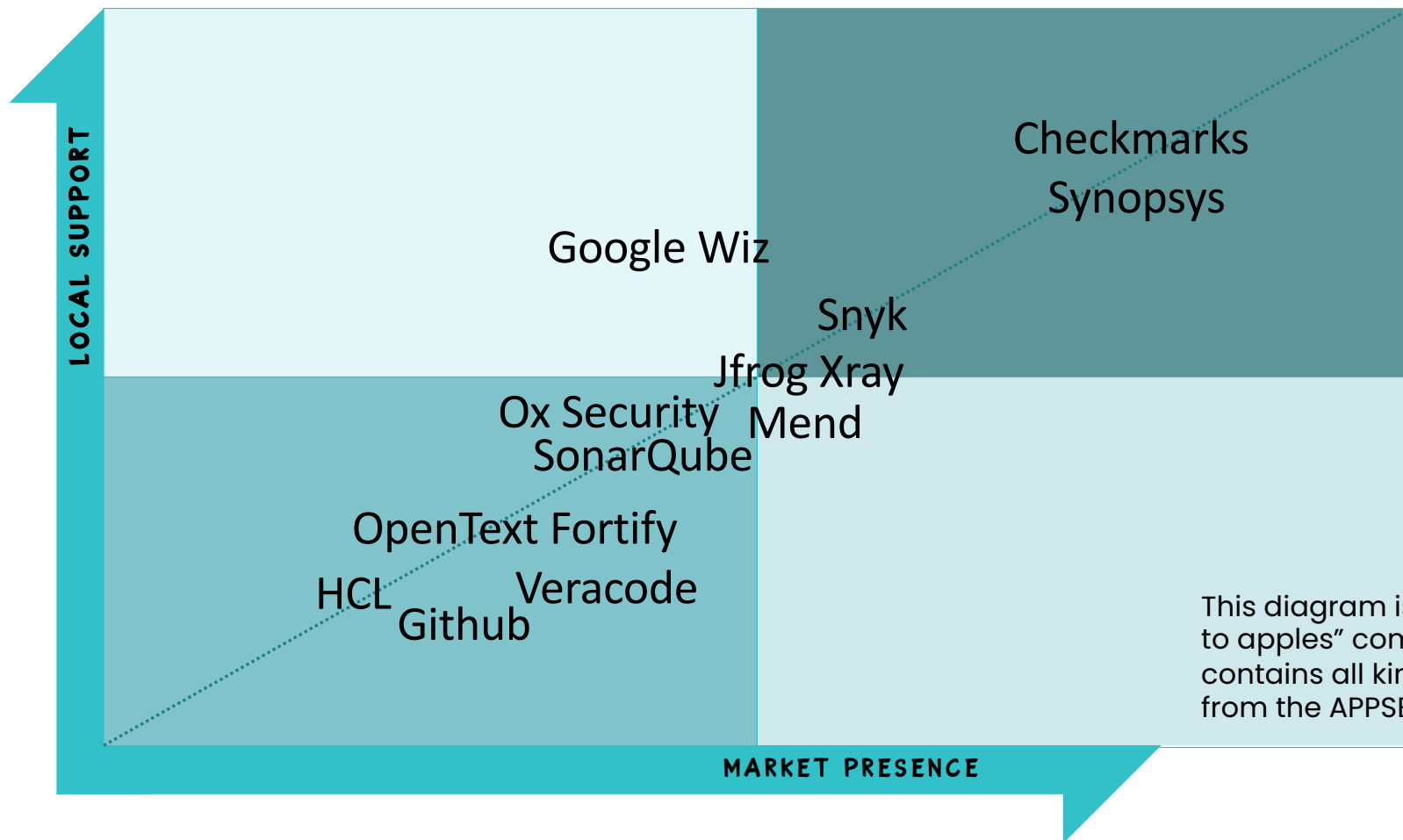


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Israel APP SEC for enterprises - market presence 2025



Apiirio
Arnica
Backslash
Oligo
Bright



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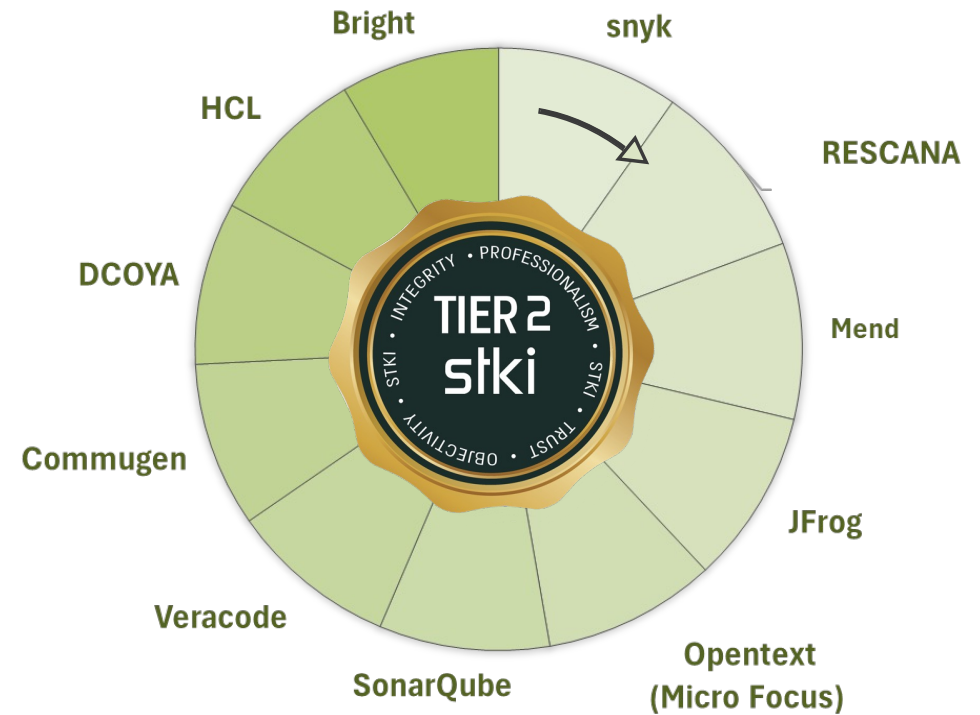


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software

Other cyber tools (secure development, awareness etc.)



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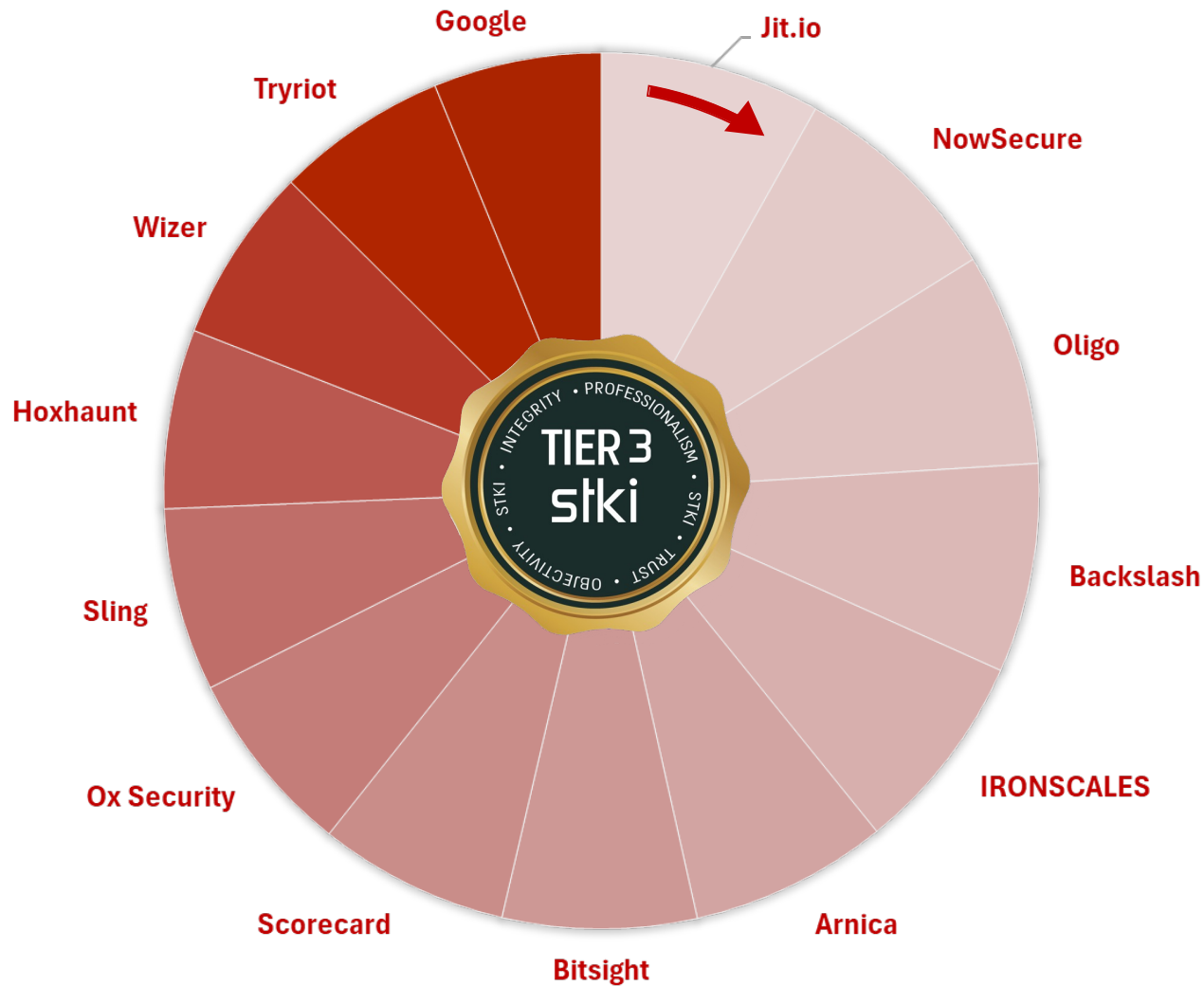
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CLIENT MINDSHARE

Other cyber tools (secure development, awareness etc.)



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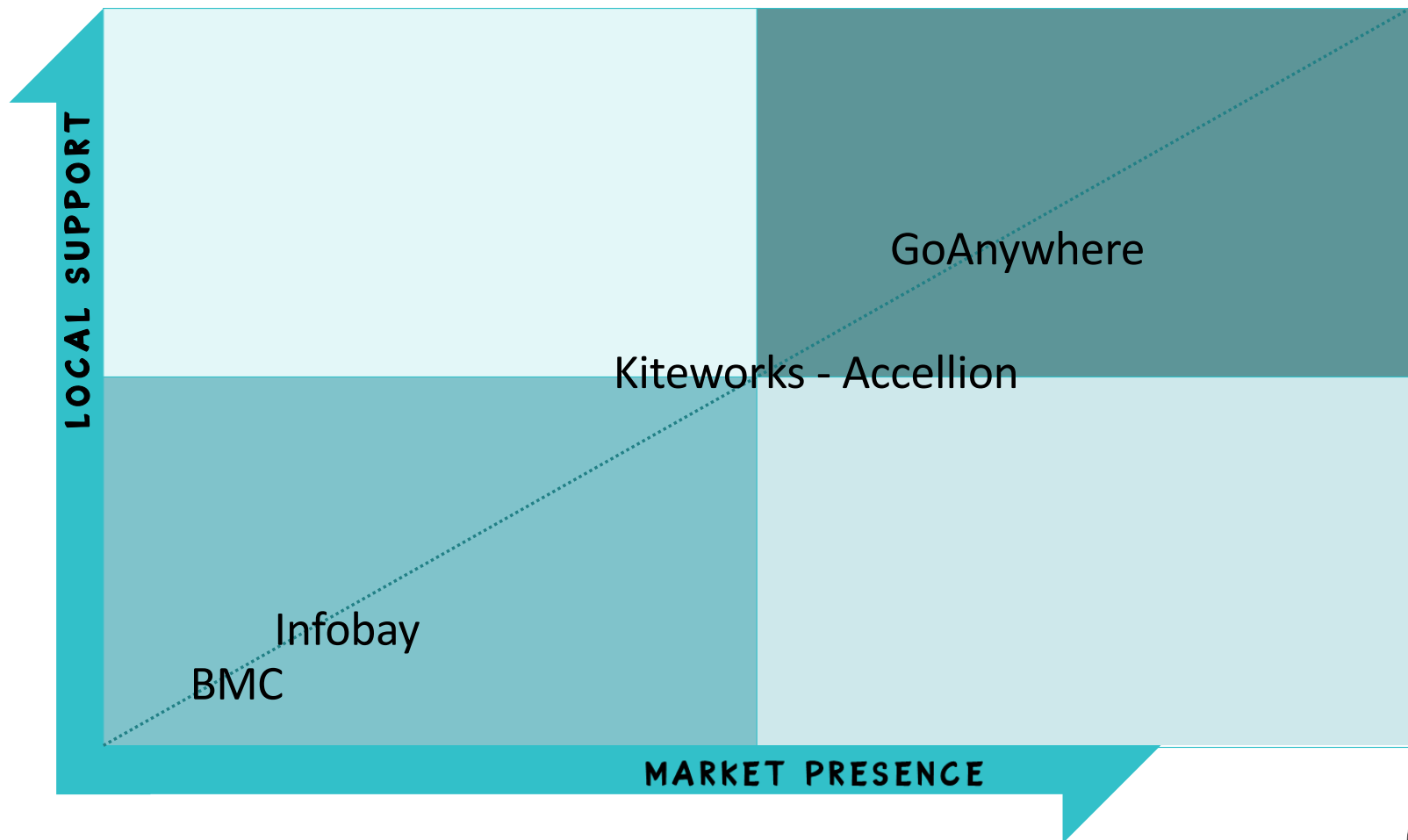


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Brands in Enterprise B2B Vaults (replacing Cyberark vaults) market presence 2025



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Project Development & Management Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Project & Portfolio Management	25	-12.00%	22	18.18%	26	19.23%	31	22.58%	38	10.53%	42	14.29%	48	12.50%	54
Development tools, ALM, Devops for all environments (including Mobile)	65	6.15%	69	4.35%	72	9.72%	79	10.13%	87	9.20%	95	10.53%	105	10.48%	116
Low Code tools	6	50.00%	9	11.11%	10	20.00%	12	50.00%	18	27.78%	23	30.43%	30	30.00%	39
TOTALS	96	4.17%	100	8.00%	108	12.96%	122	17.21%	143	11.89%	160	14.38%	183	14.21%	209



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Values in Million USD



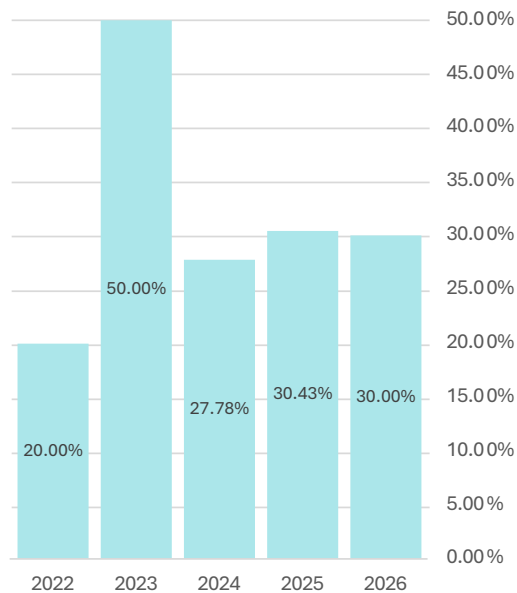
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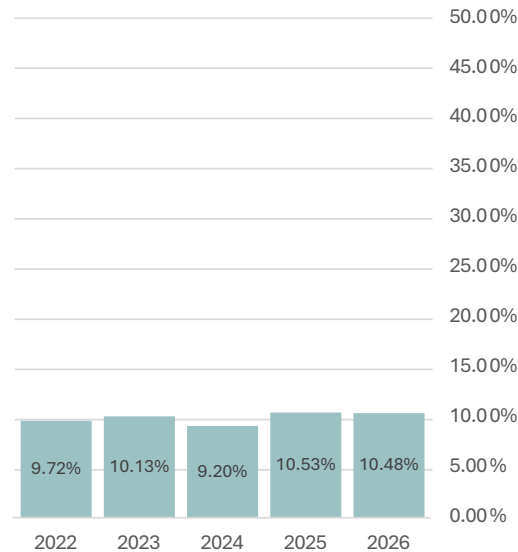
software

Project Development & Management Tools Market 2022-2026

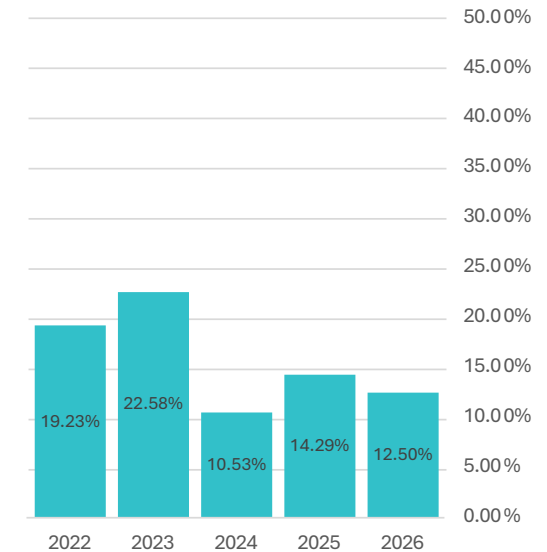
Low Code tools



Development tools, ALM, Devops for all environments



Project & Portfolio Management



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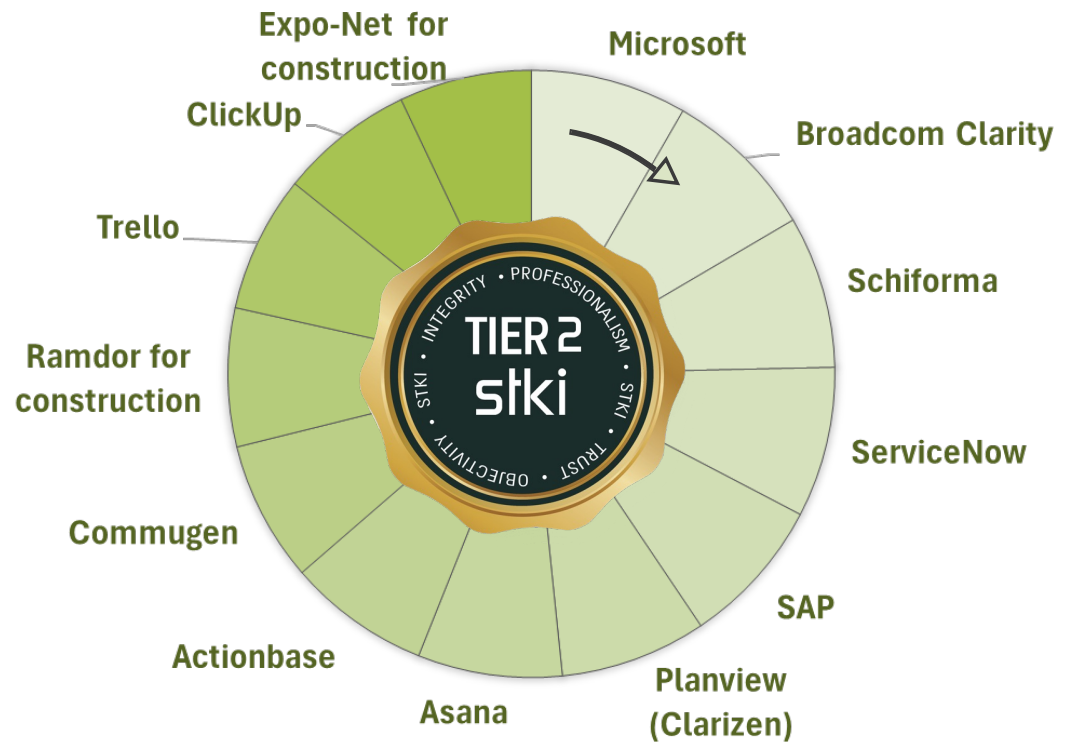


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Project & Portfolio Management Tools



We rank VENDORS
by REVENUE and
CLIENT MINDSHARE



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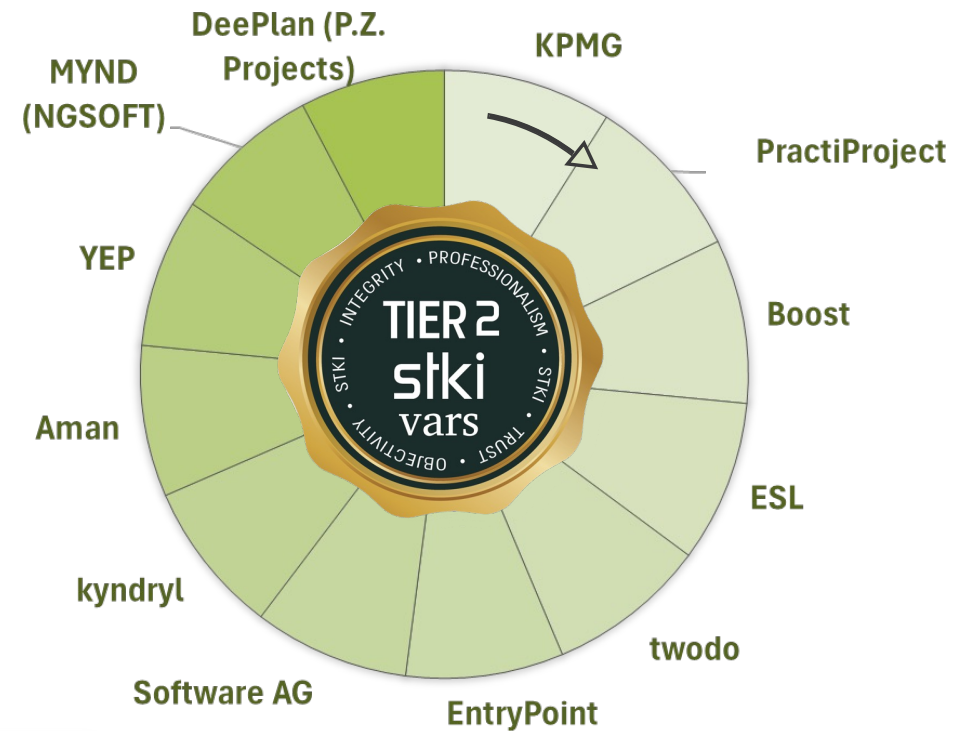


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Project & Portfolio Management Tools VARs



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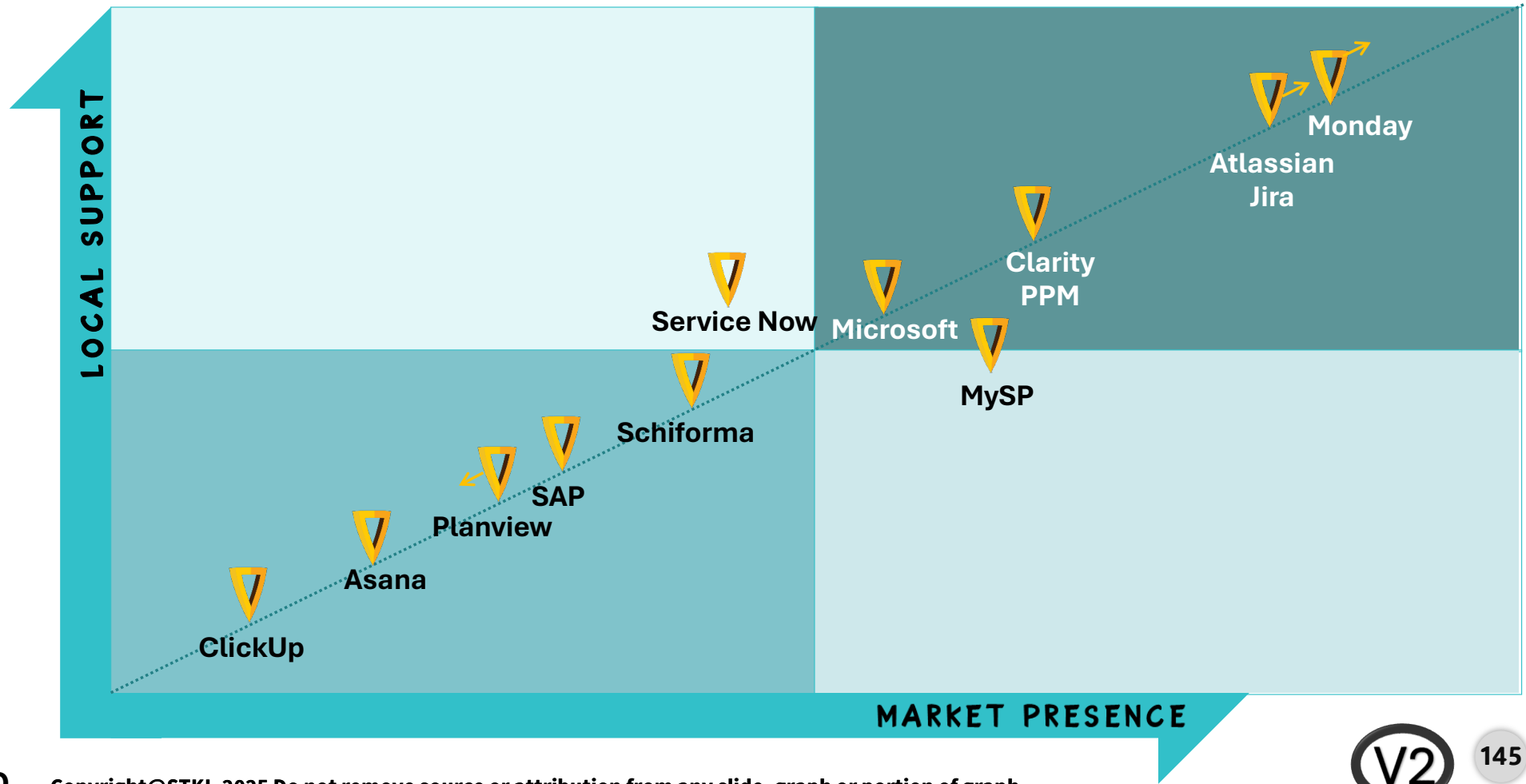
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PPM Israeli Market Positioning– 2025

Presence & Support in Israel



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V2

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PPM Israeli Market Positioning– 2025

Integrators

monday.com

Advanced Solution Partner: Abra, Boost
Platinum: Matrix, KPMG, ESL
Gold: Abra, Entry point
Silver: TWODO, YEP
Proceed, RBS

Atlassian Jira

Platinum: Abra (Methoda), Matrix, Practiproject
Gold: AgileSparks
Silver: ESC
Proceed, Bynet, RBS

Clarity PPM By Broadcom

Proceed (HMS)

MySP

ONEI

Sciforma

Top Group

Microsoft EPM

Matan, DeePlan, RBS

ServiceNow

Strategic Portfolio Management

Dicomano One, Deloitte, Bynet, Verdera

SAP PPM

SAP, Proceed, Matan, Malam other potential SAP integrators

PlanView Clarizen

DeePlan



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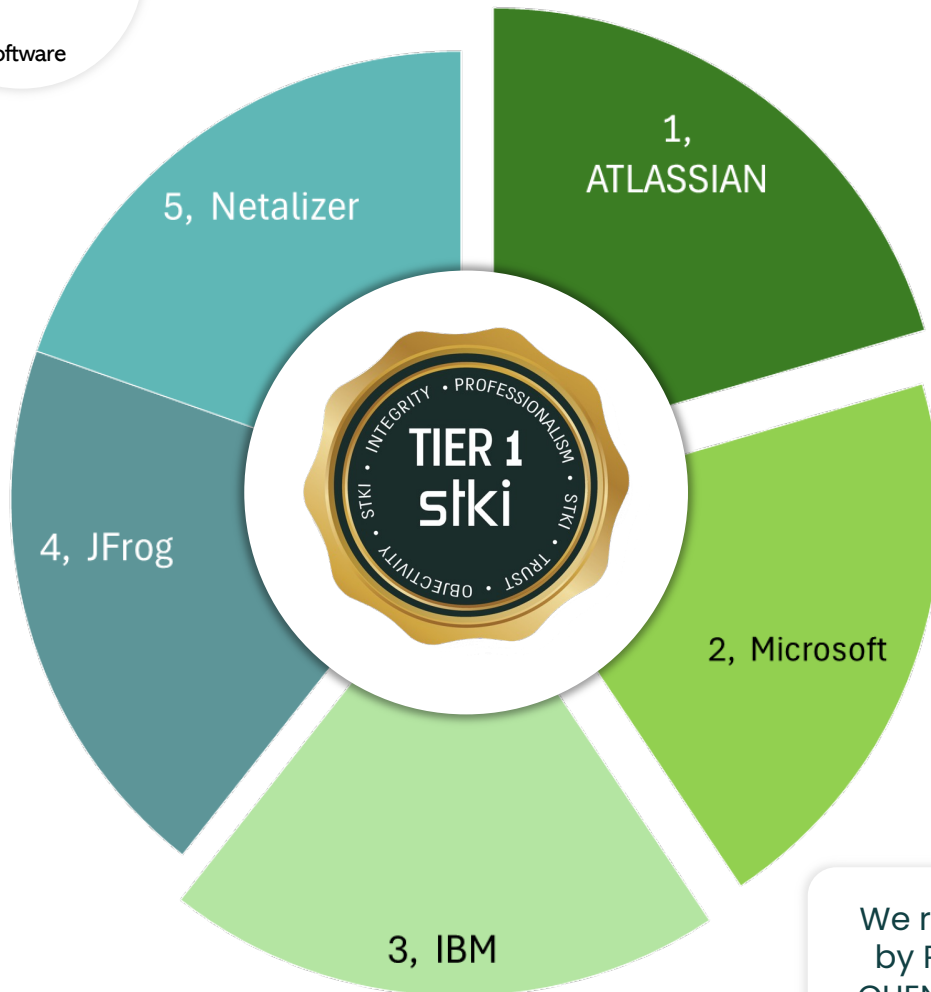


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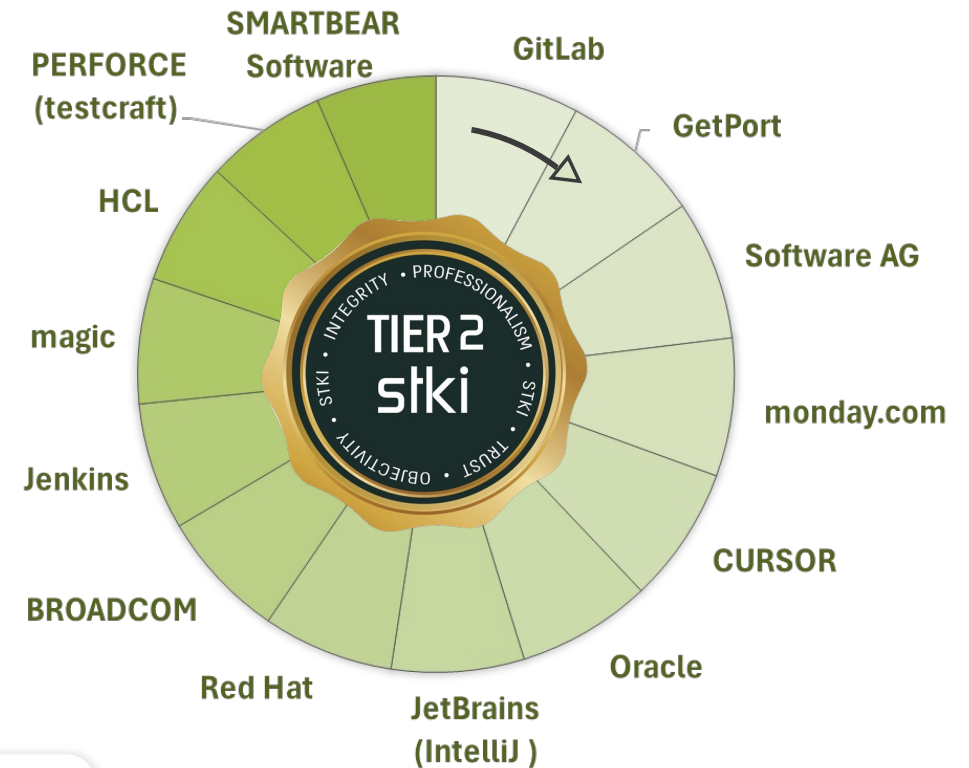


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Development, Mobile, ALM & DevOps tools



We rank VENDORS
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CLIENT MINDSHARE



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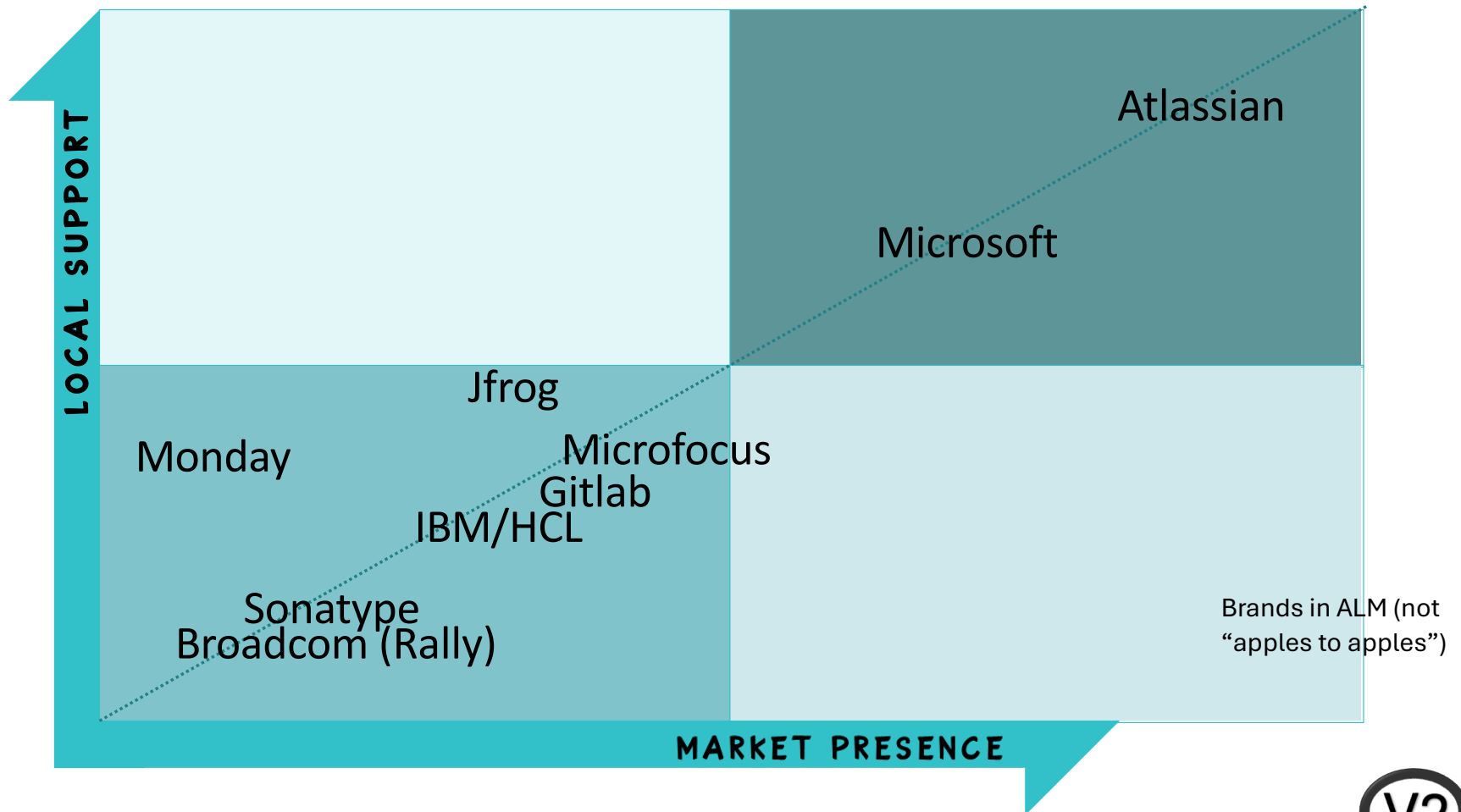


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ALM (Application Lifecycle Management) - Israeli market presence 2025



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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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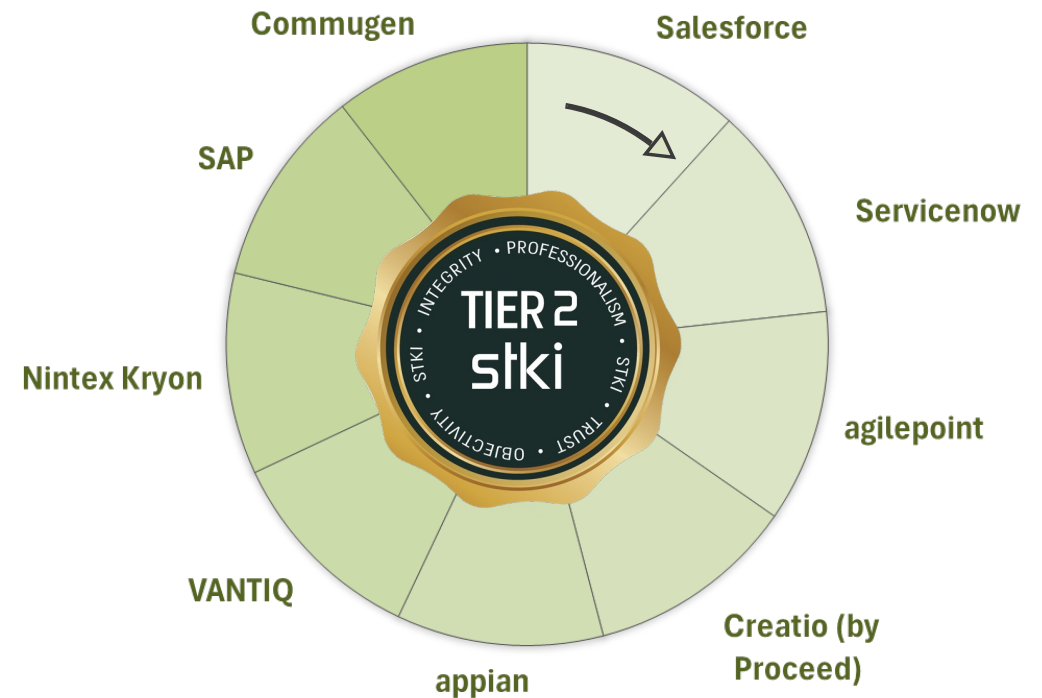
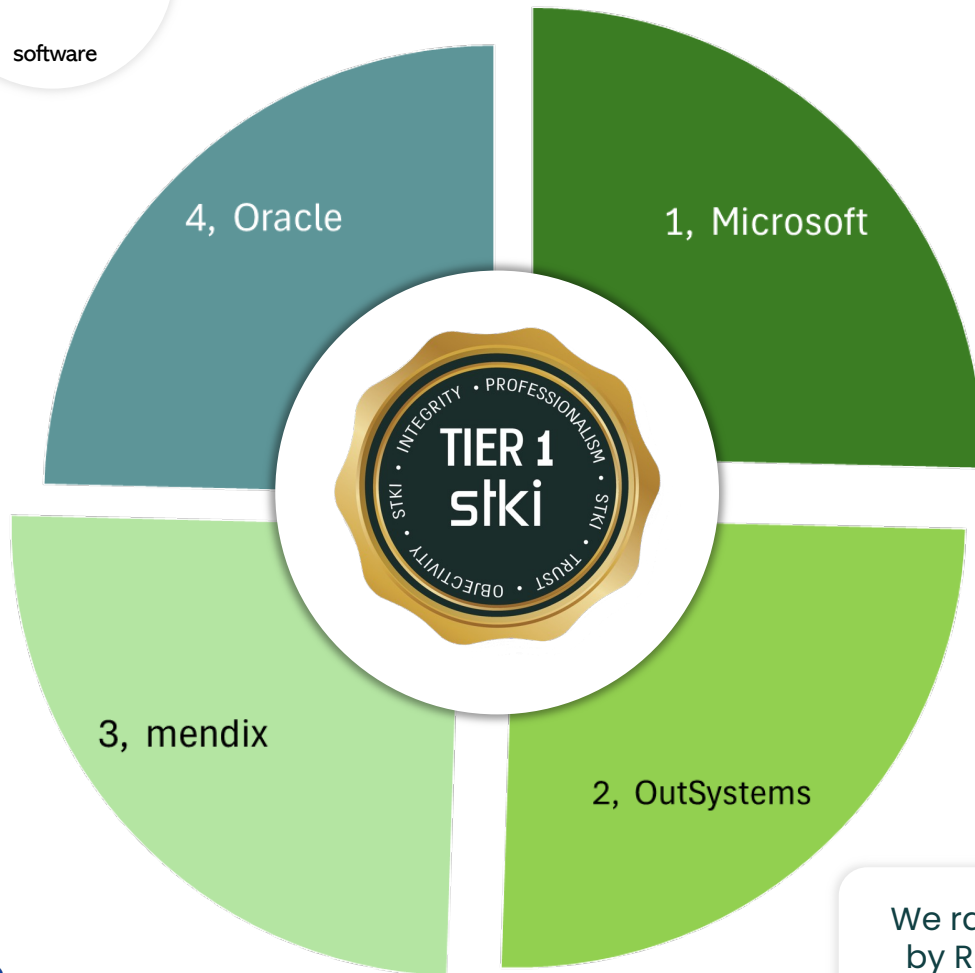


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Low Code (includes BPM) tools



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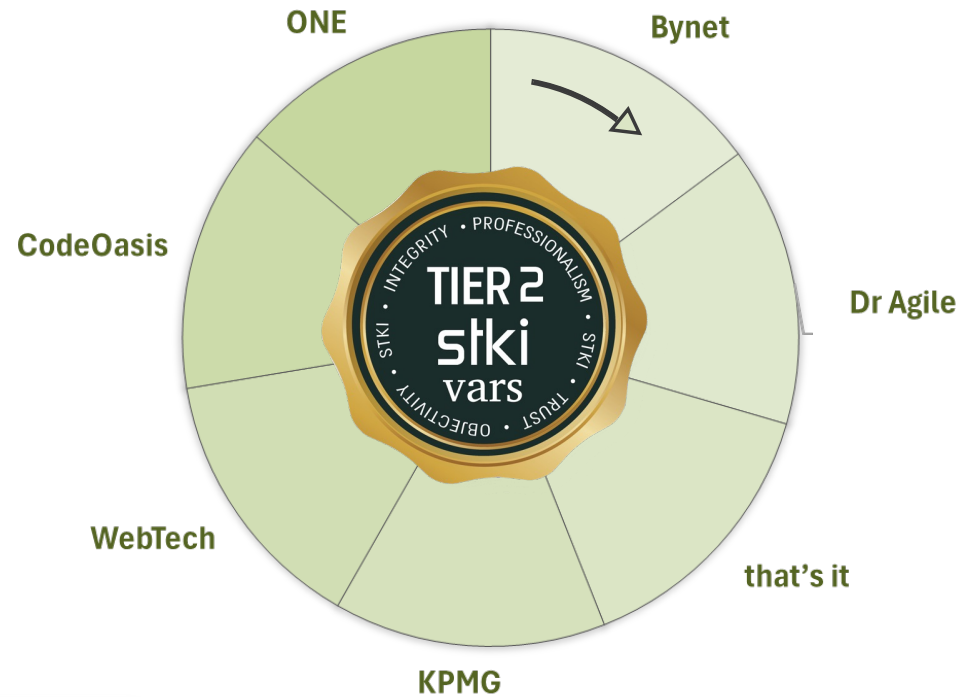


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Low Code tools Resellers of licensing VARs



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EGRC & Regulation Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Governance, Risk & Compliance	20	-10.00%	18	-22.22%	14	-3.57%	13.5	11.11%	15	13.33%	17	17.65%	20	20.00%	24
Regulation Software					8	-12.50%	7	21.43%	8.5	17.65%	10	20.00%	12	16.67%	14
TOTALS	20	-10.00%	18	22.22%	22	-6.82%	20.5	14.63%	23.5	14.89%	27	18.52%	32	18.75%	38



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Values in Million USD



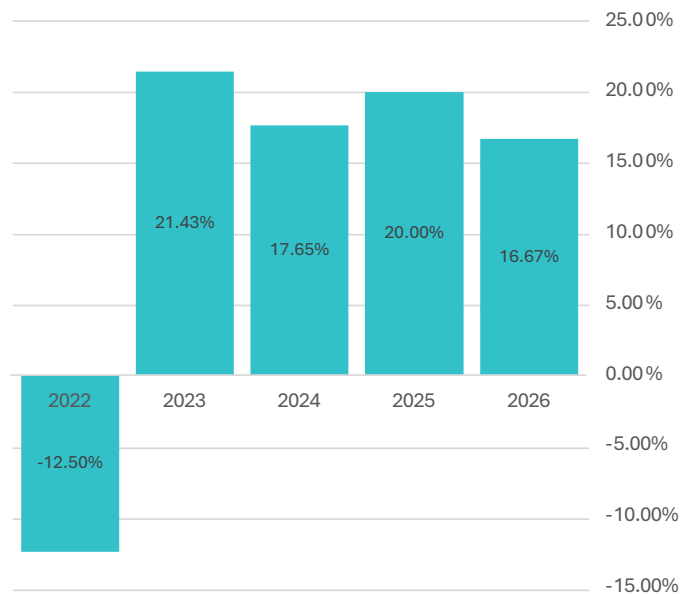
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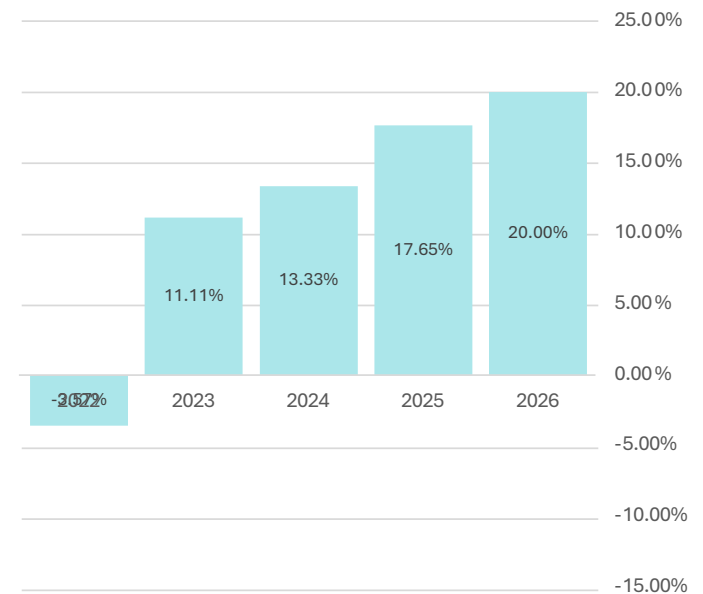
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EGRC & Regulation Tools Market 2022-2026

Regulation Software



Governance, Risk & Compliance



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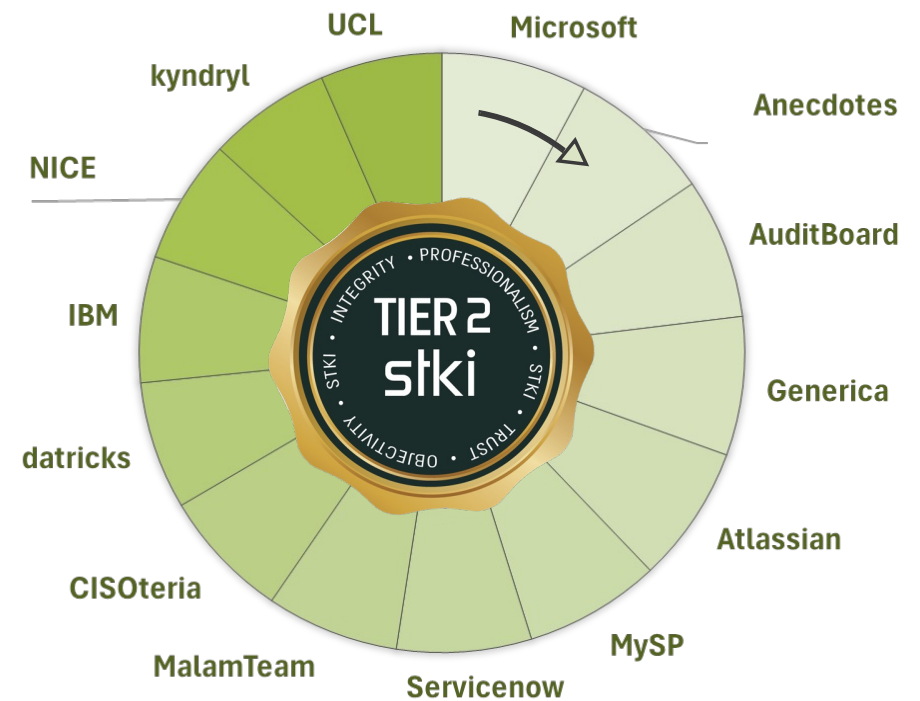


software

Governance, Risk & Compliance Tools



We rank VENDORS
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CLIENT MINDSHARE



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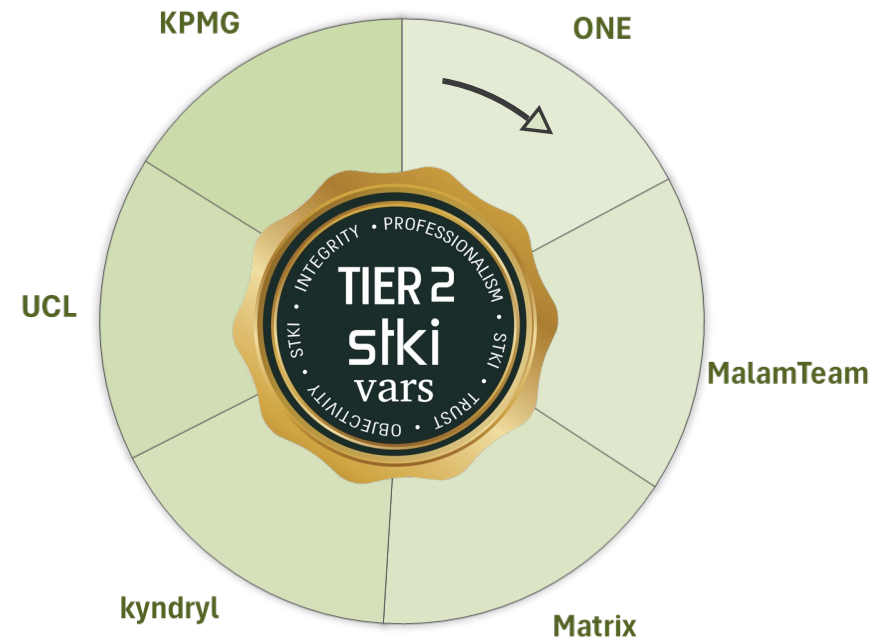
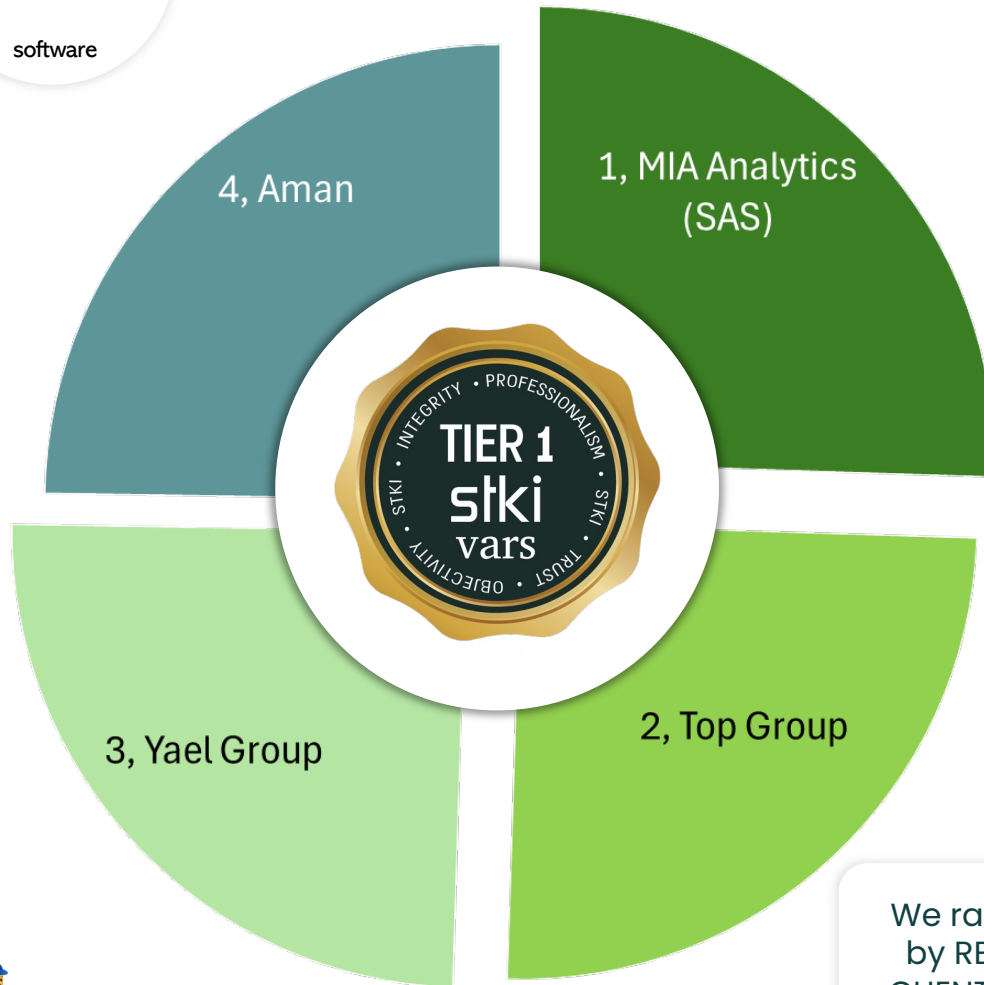


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Governance, Risk & Compliance Tools



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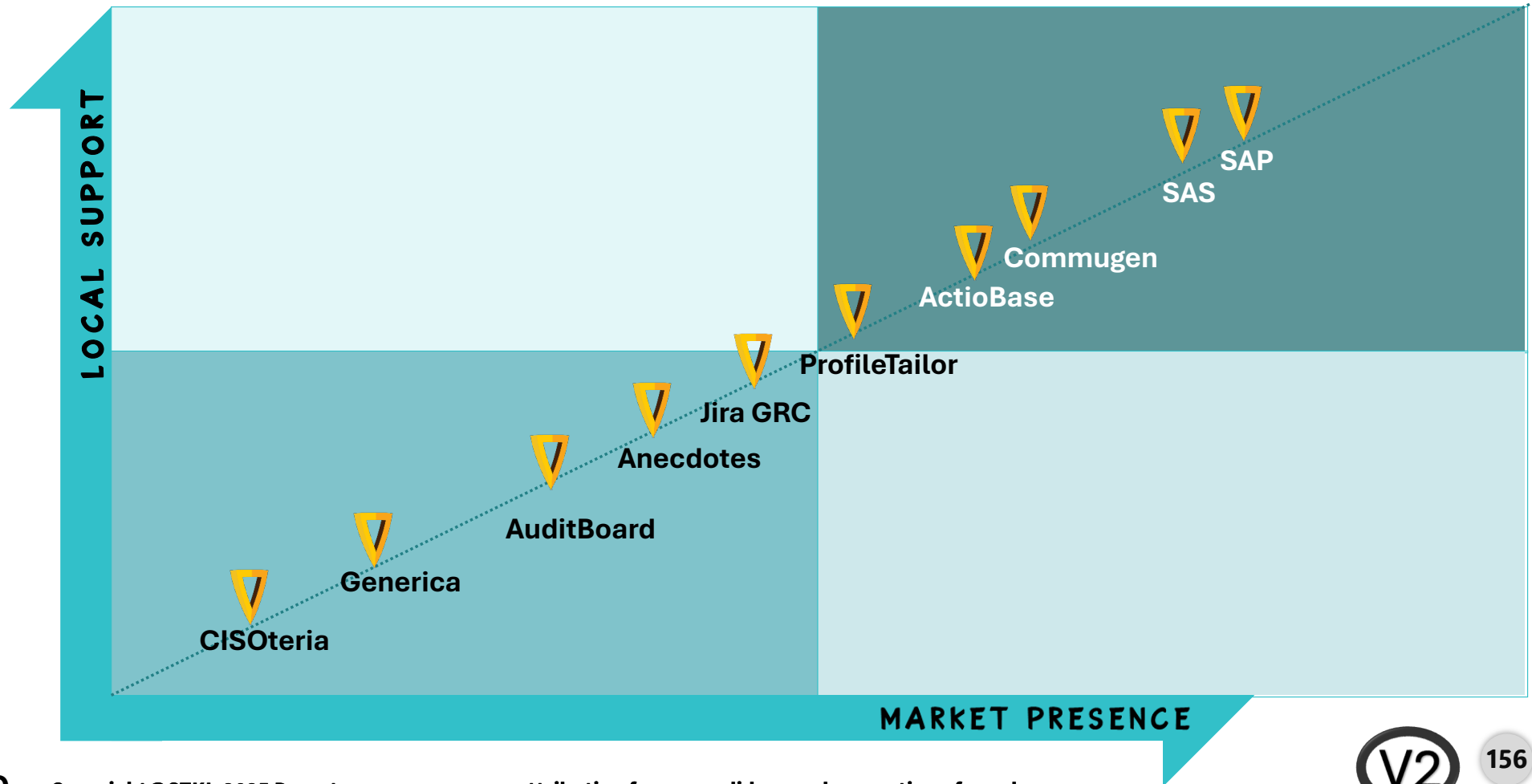
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GRC Israeli Market Positioning– 2025

Presence & Support in Israel



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GRC Tools & Integrators in Israel 2025

SAP GRC

Malam, Deloitte, KPMG, EY, Globicon, ONE, SAP integrators

IBM OpenPages

IBM Expert Labs, ABP, Malam, Matrix

SAS

MIA, Entropy

Global Players:

AuditBoard by Hg

Service Now

Cognizant, Bynet, Deloitte, Docomano One

Jira GRC

Abra (Methoda), Matrix, Partiproject, Proceed

Commugen

Commugen

Actionbase

Top Group, Deloitte

Datricks

(Financial Integrity Platform)

Datricks, SAP

Actionbase

Ness

Local Players:

MySP

ONE

Generica

Top Group



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Knowledge & Collaboration Tools Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Office productivity, KM	158	-1.90%	155	-9.68%	140	-7.14%	130	11.54%	145	10.34%	160	12.50%	180	11.11%	200
Digital Output Management/Custom er Communication Management	25	8.00%	27	7.41%	29	-13.79%	25	8.00%	27	3.70%	28	3.57%	29	3.45%	30
Employee Collaboration, Task Management & Engagement Tools	15	33.33%	20	15.00%	23	-8.70%	21	9.52%	23	26.09%	29	24.14%	36	16.67%	42
TOTALS	198	2.02%	202	-4.95%	192	-8.33%	176	10.80%	195	11.28%	217	12.90%	245	11.02%	272



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Values in Million USD



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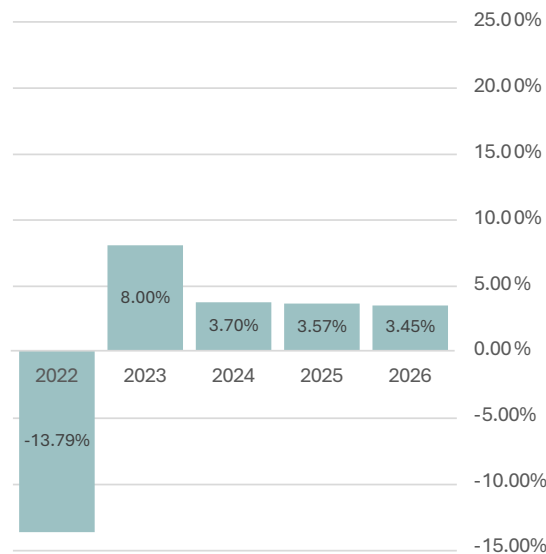
software

Knowledge & Collaboration Tools Market 2022-2026

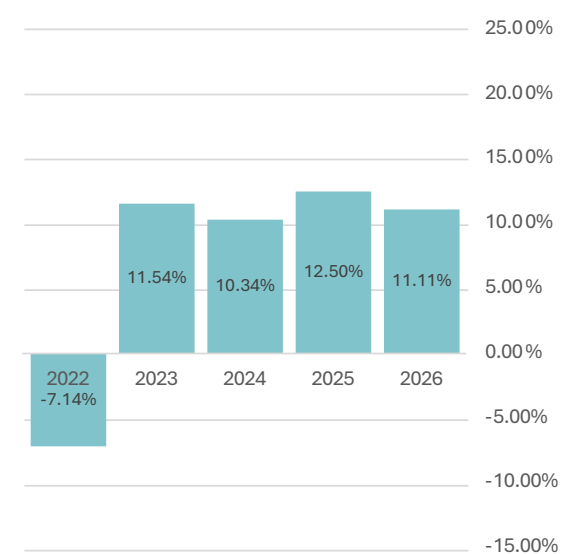
Employee Collaboration, Task Management & Engagement Tools



Digital Output Management / Customer Communication Management



Office productivity, KM



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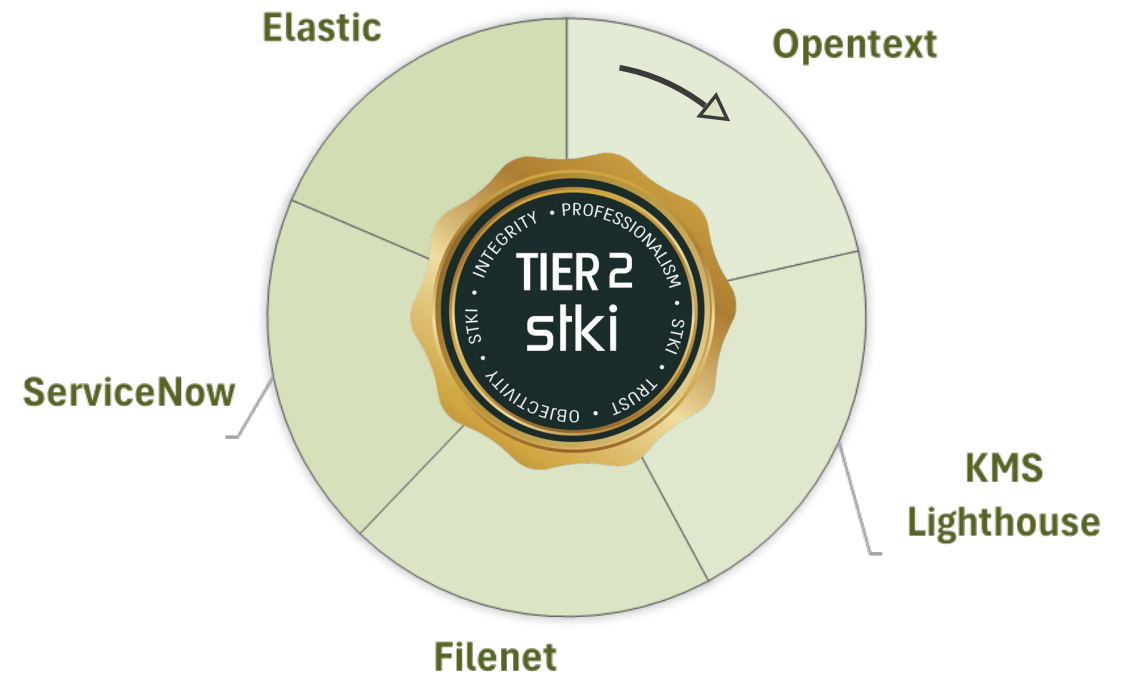
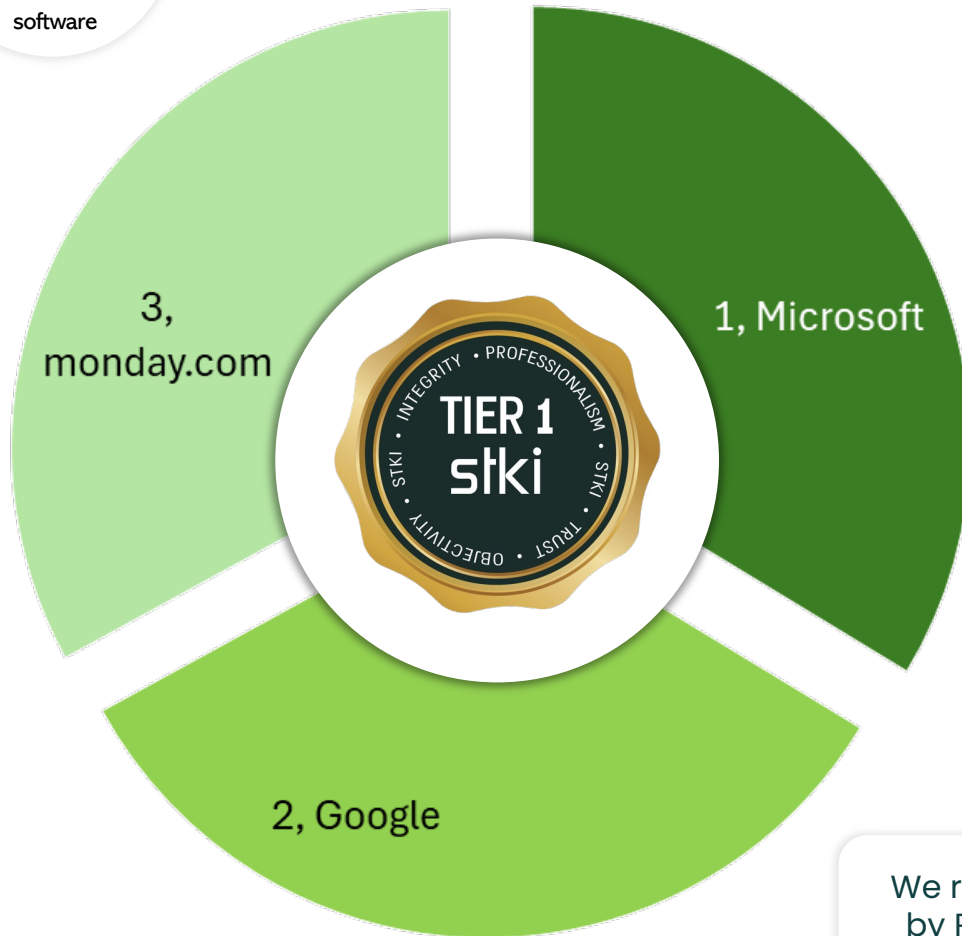


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Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)



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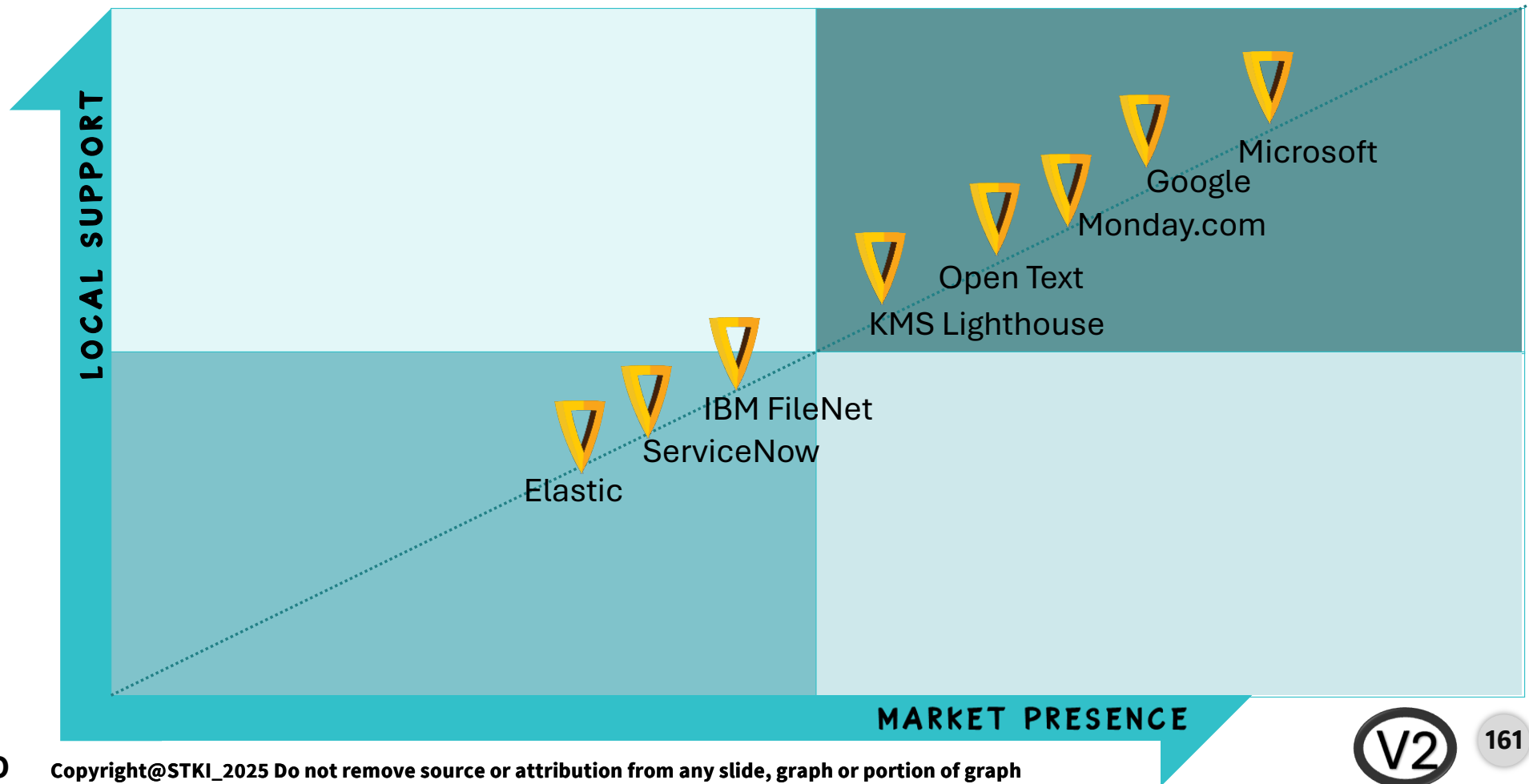
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Office Productivity and Knowledge Tools 2025

Presence & Support in Israel



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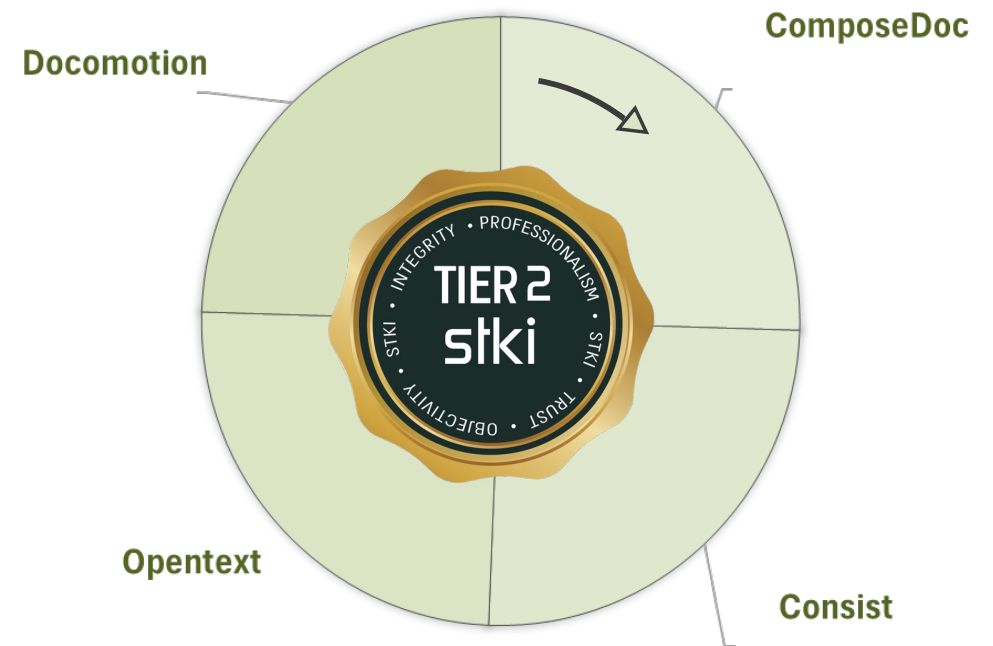
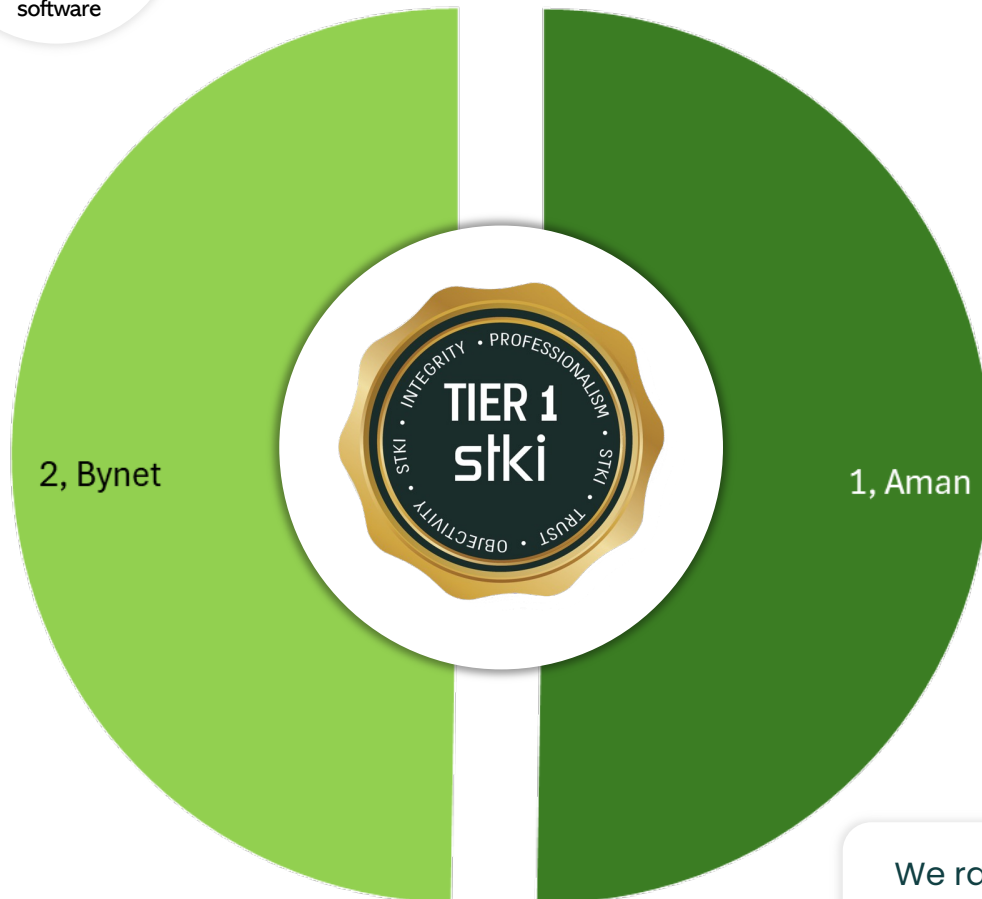


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Digital Output Management/Customer Communication Management



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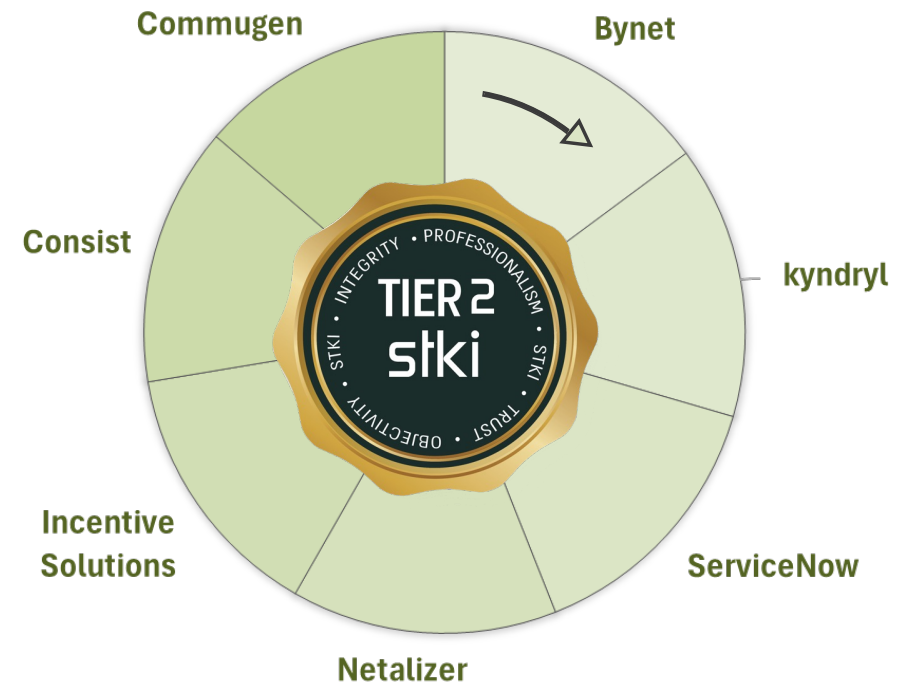
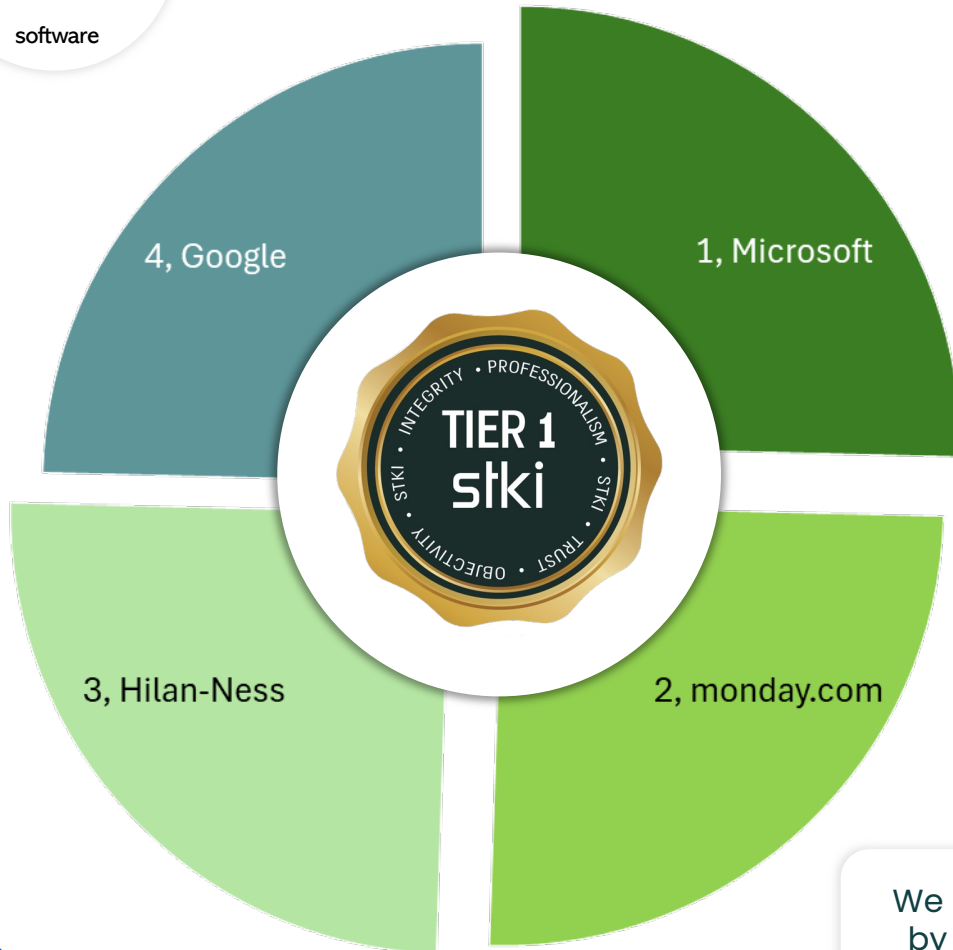


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Employee Collaboration & Engagement Tools



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CLIENT MINDSHARE



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BI, Data Management and Analytical AI Platforms Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
BI Tools	140	7.14%	150	3.33%	155	-1.94%	152	-1.32%	150	-2.67%	146	-1.37%	144	4.17%	150
Data Governance and Management Tools	58	3.45%	60	5.00%	63	-4.76%	60	-5.00%	57	1.75%	58	3.45%	60	1.67%	61
Data Science and Analytical AI (ML) Platforms	29	24.14%	36	13.89%	41	-14.63%	35	22.86%	43	6.98%	46	6.52%	49	6.12%	52
TOTALS	227	8.37%	246	5.28%	259	-4.63%	247	1.21%	250	0.00%	250	1.20%	253	3.95%	263



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Values in Million USD



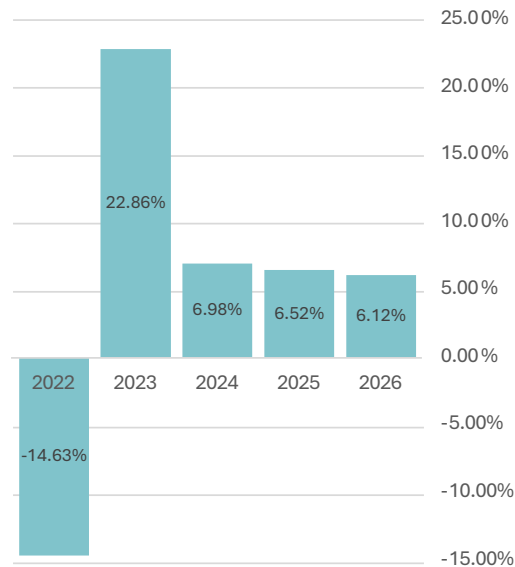
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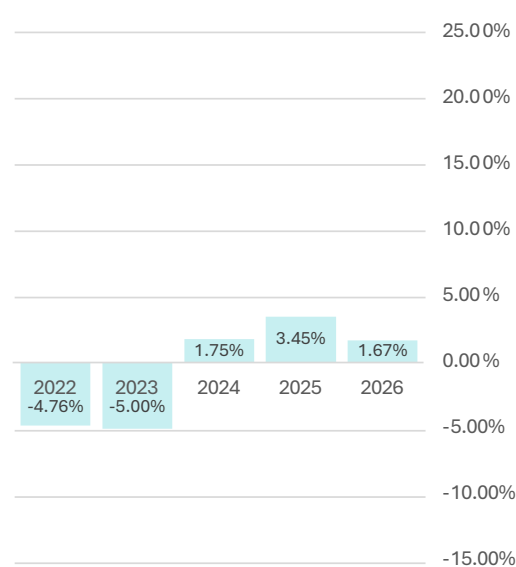
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BI, Data Management and Analytical AI Platforms Market 2022-2026

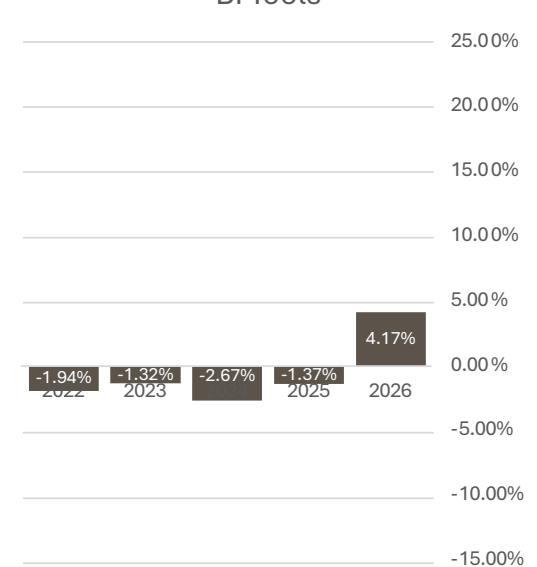
Data Science and Analytical AI (ML) Platforms



Data Governance and Management Tools



BI Tools

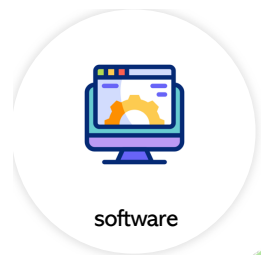


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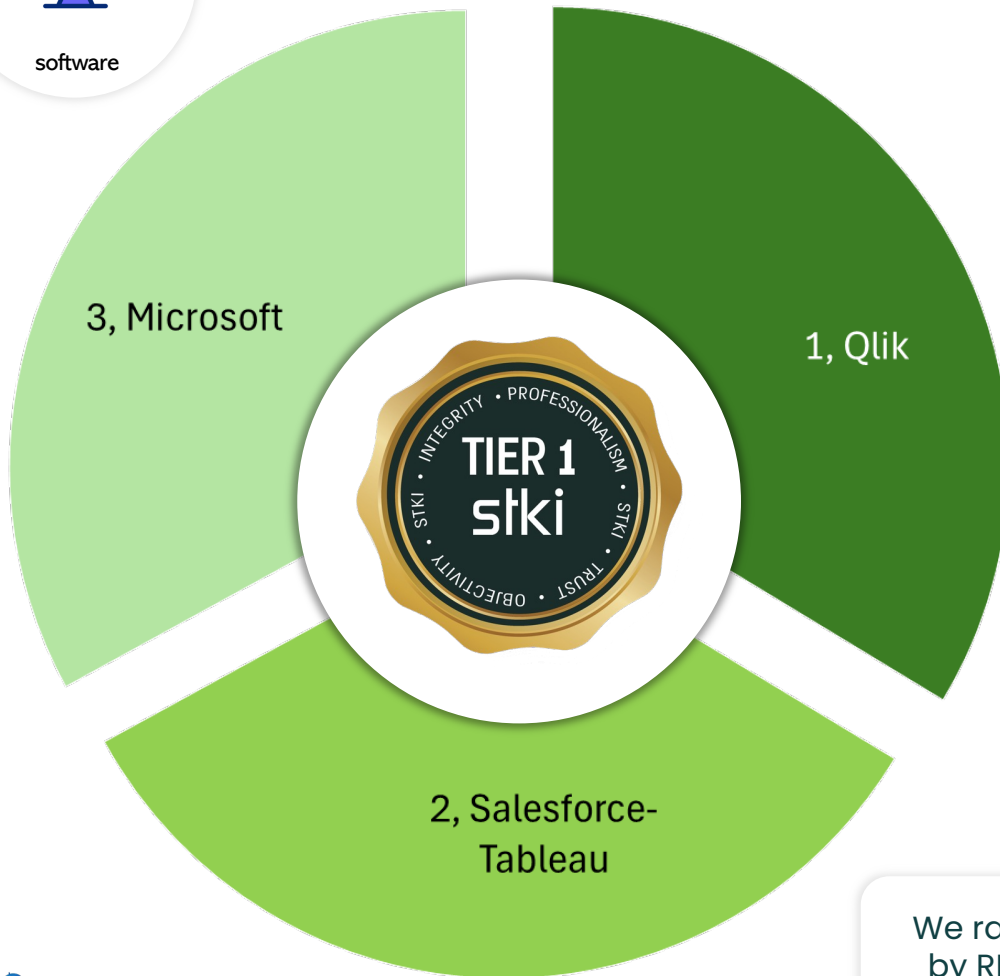
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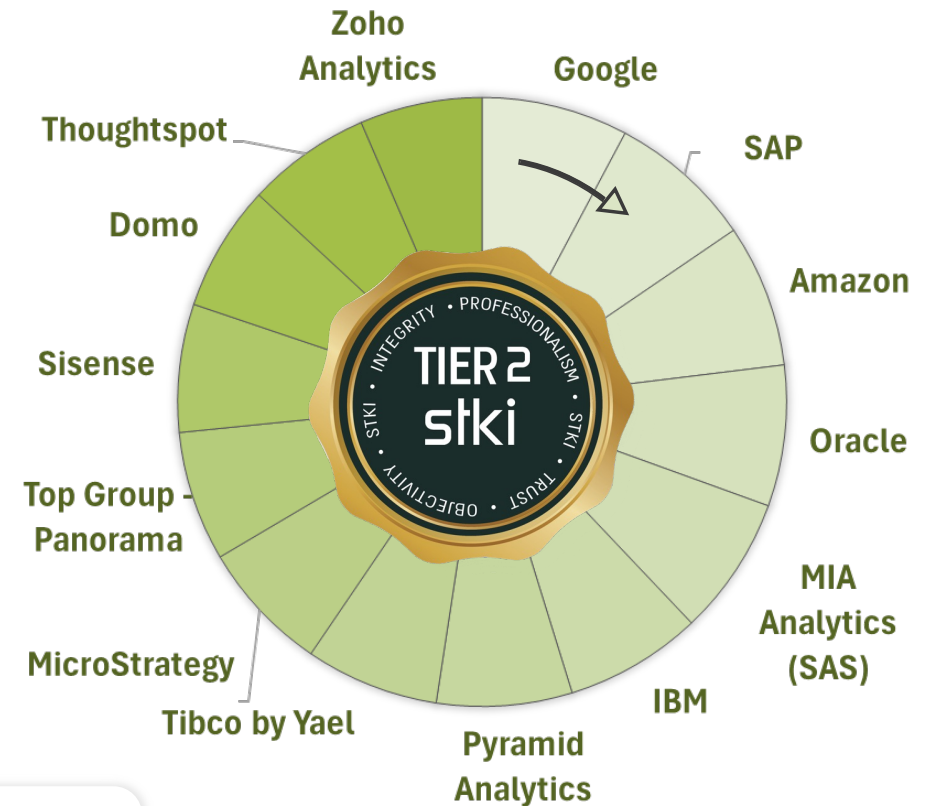
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BI Tools



We rank VENDORS
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CLIENT MINDSHARE



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Business Intelligence 2025

Presence & Support in Israel

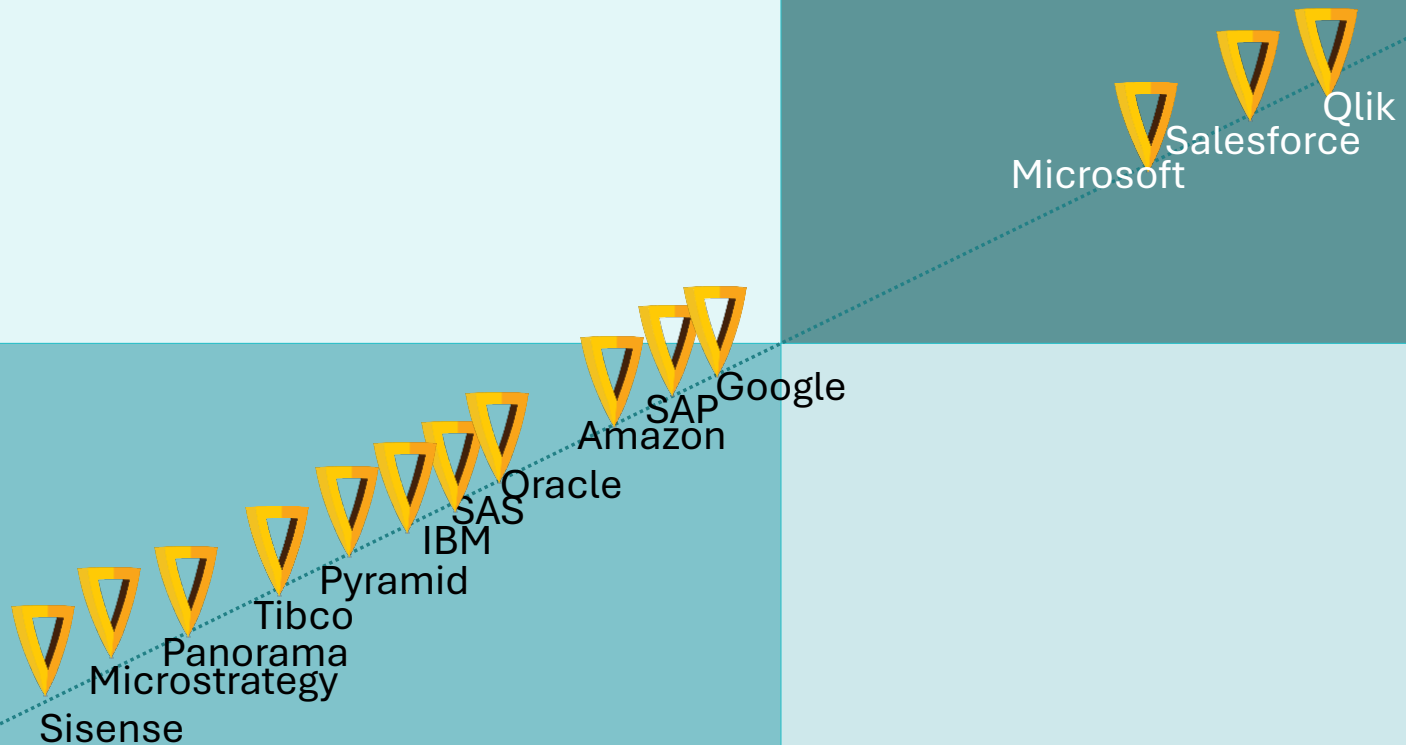


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Domo
Thoughtspot
Zoho Analytics

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Infrastructure

Business Intelligence (BI) - Part 1:

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



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Infrastructure

Business Intelligence (BI) - Part 2:

Package	Rep in Israel	Integrators
SAS BI + VA	Mia Computers (SAS)	Mia computers, Yael all Data, Pareto, Nogamy
Microstrategy	Microstrategy Israel	I.E Mittwoch, Twingo Commit, Matrix DnA, StrategyBI
Oracle Analytic Cloud	Oracle Israel	Oracle Consulting, SangIT, EMET-Veracity, SIT
Tibco Jaspersoft Tibco Spotfire Web Focus (acquired by Tibco)	Yael	Yael all Data, 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), Yael all Data, one, Matrix, KPMG...
Quicksight - Amazon	Amazon Israel	One Data, Allcloud....
Domo	Elad Data	Elad Data
Thoughtspot		VisionBI, Be2See (Emet)
Zoho Analytics		



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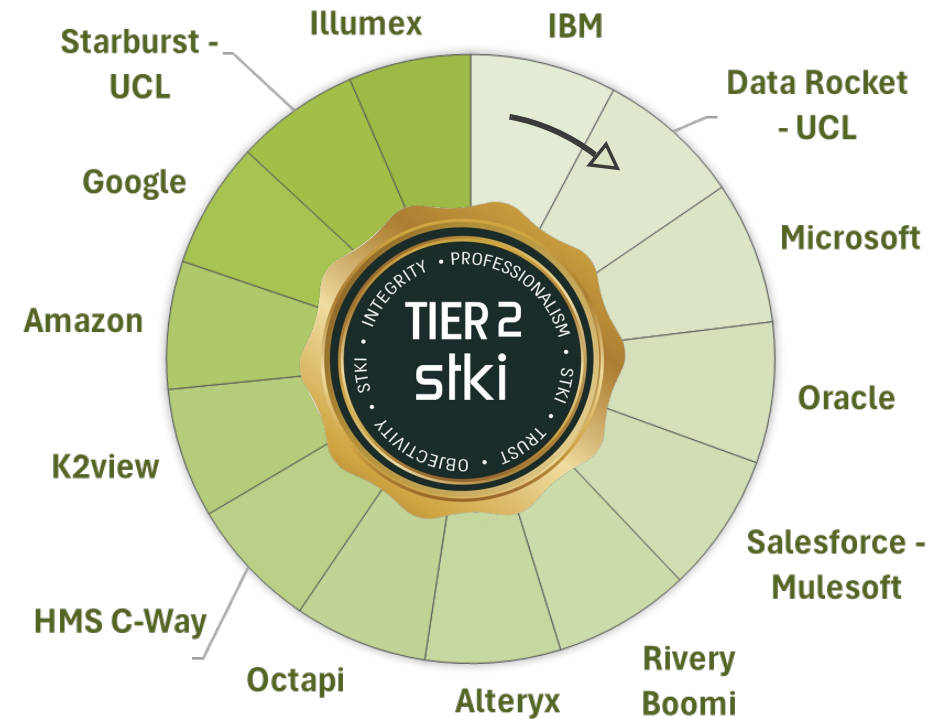
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Data Mgmt. Tools

(including data catalog, governance, ETL, quality)



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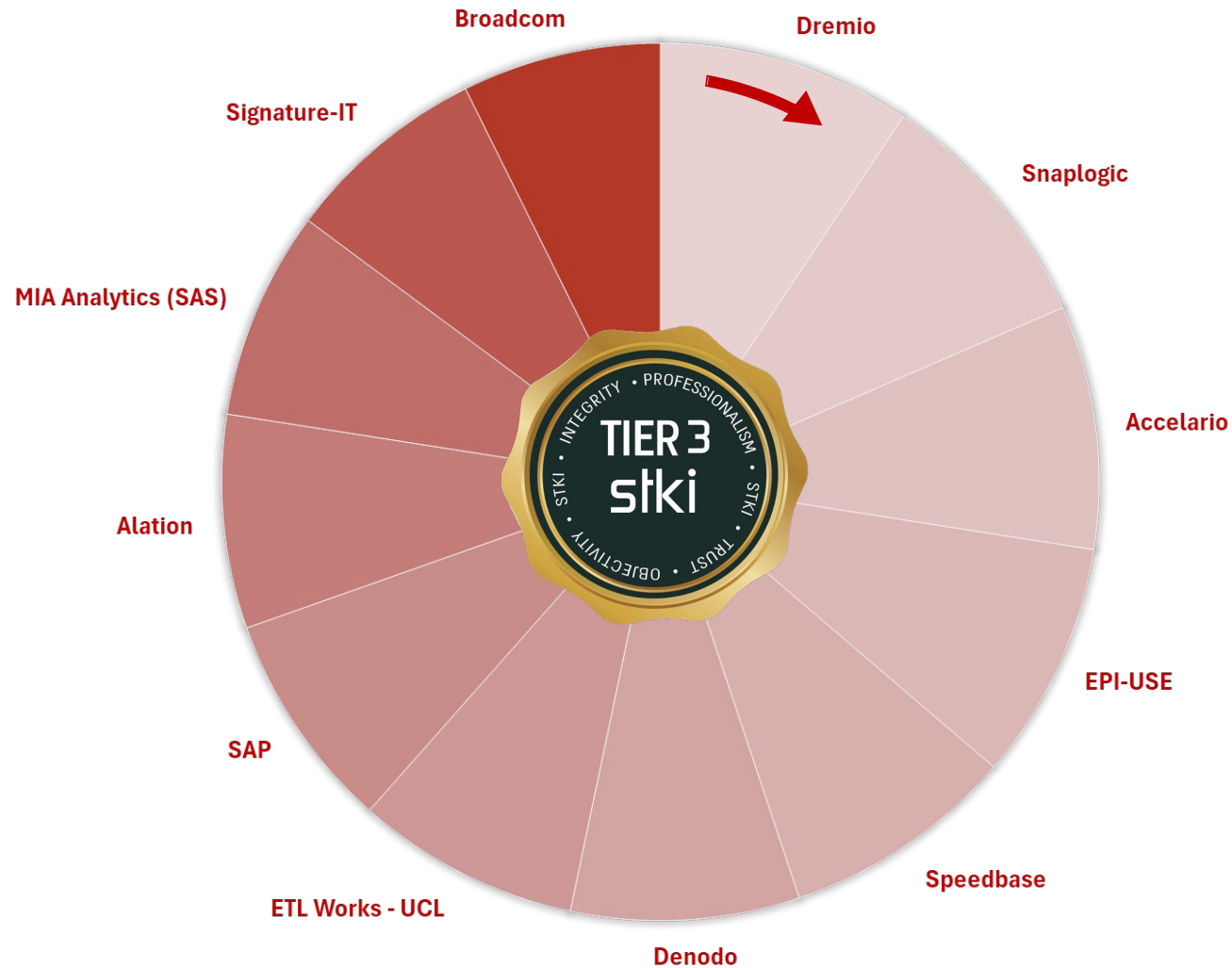
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Data Mgmt. Tools (including data catalog, governance, ETL, quality)



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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 Eternity
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, KPMG
Octapi	Metadata Management, Data Lineage	Aman - Eternity
Alteryx (+ acquired Trifacta)	Data Preparation	Rep: One Data, 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...
C-way		HMS
Hazy (acquired by SAS)	Synthetic Data	Mia Computers



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Digital Intelligence Solutions

Package	Rep in Israel	Integrators
Google Analytics Google 360	Google Israel	one-Saban, Elad, Matrix and many more...
Glassbox (Interaction analytics)	Hilan-Ness-Pro	Hilan-Ness-Pro
Matomo (Piwik)		one-Saban
Hotjar (heat maps)		One-Saban, Elad...
Mixpanel	Yael	Yael all Data
Adobe Experience Cloud (Acquired Omniture)	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
FullStory		one-Saban



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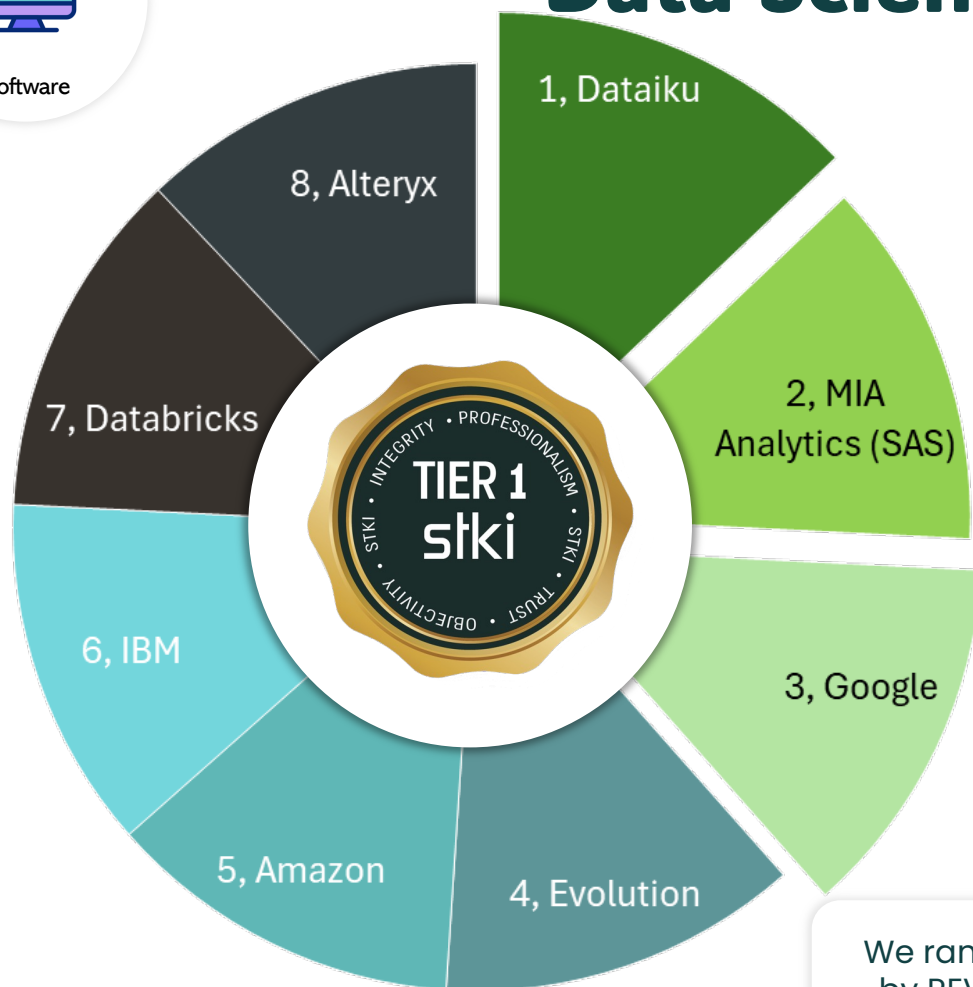


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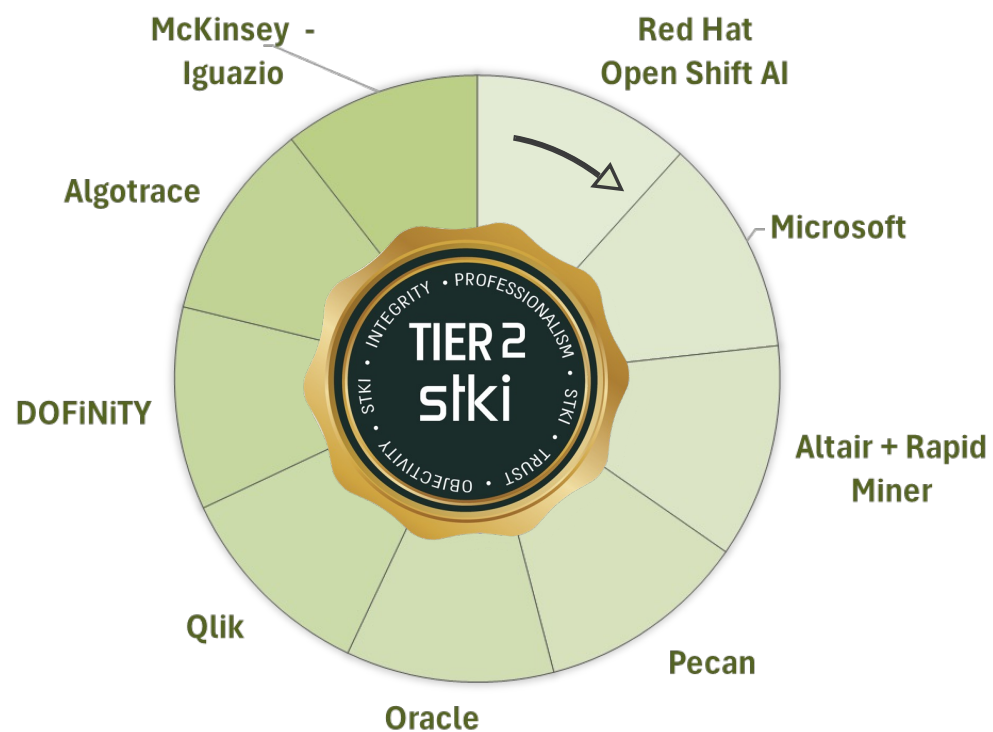


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Data Science and ML/AI Tools



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Data Science ML Platforms 2025

Presence & Support in Israel



SAP

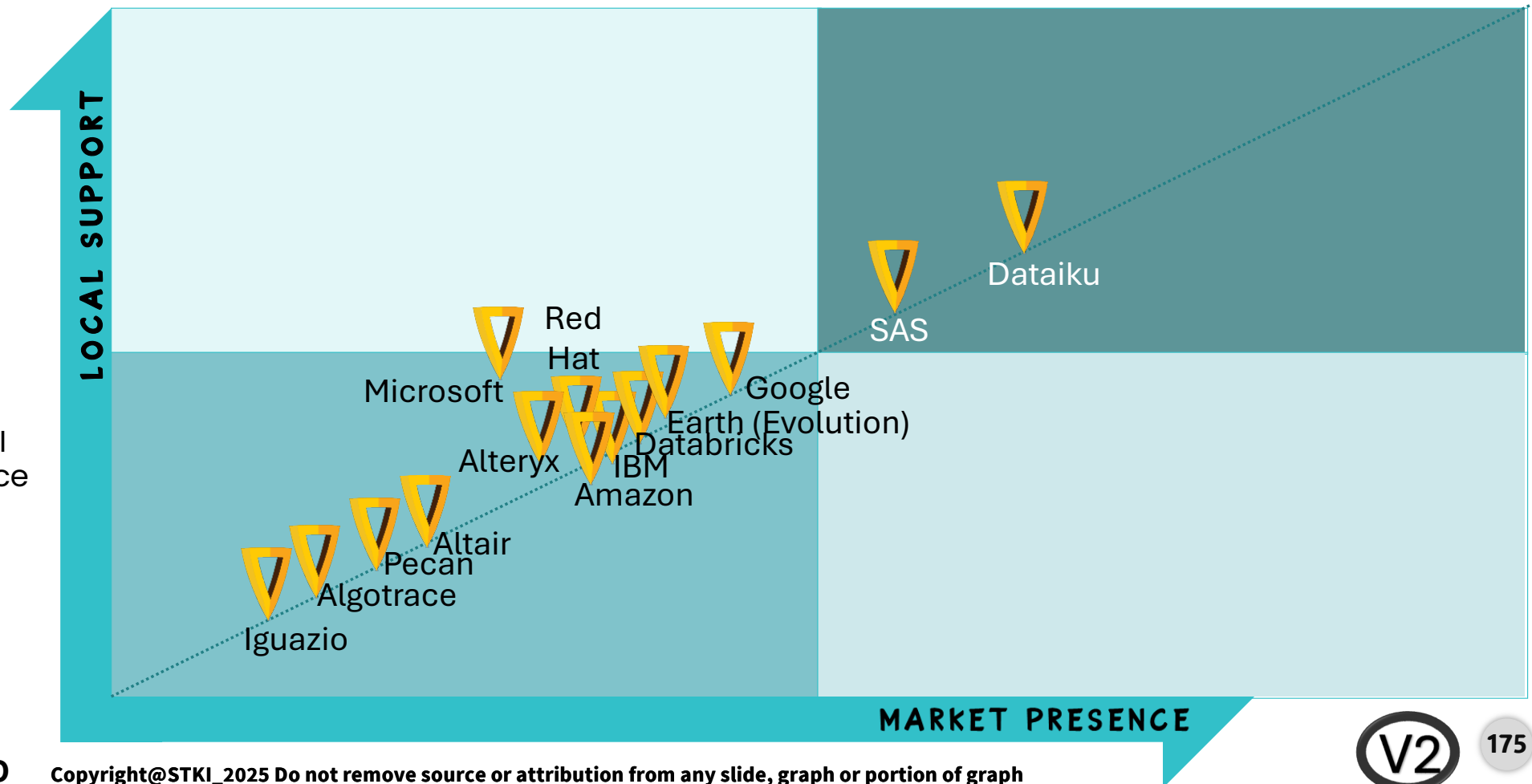
Oracle OCI
Data Science



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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), Appsgrade (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-Eternity, Commit, Sela, Matrix Databricks CoE, AllCloud, KPMG, Deloitte, Malam-Team
Data Robot		Matrix DnA, Emet
Altair – RapidMiner	Altair	MatrixDnA
Alteryx	One Data	One, UCL, SIT
Earth by Evolution	Evolution	Malam-Team, Aman-Eternity, One Data
Algotrace (Qualitest)		
NBO	Gstat	Gstat
Iguazio (McKinsey)	Iguazio, Belocal	Belocal, DSG
Tibco Spotfire (Statistica)	Yael Software	Yael all Data
ClearML (MLOps)		Matrix DnA



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Data Science Platforms – Part 2:

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



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GenAI solutions and platforms in Israel Part 1

Product	Description	Platform	Solutions	Rep/Partners in Israel
Jeen.ai	Platform for "low code" GenAI apps	X	X	Jeen.ai
Kal-Sense	SaaS "GenAI applications"	X	X	Kaleidoo by Bynet
Melingo	Hebrew text analysis, NLP		X	SQLink, Yael, Hilan-Ness Pro
Tango AI	AI BI		X	Tango AI, Aman
Gentrix	Platform & Packaged GenAI solutions	X	X	SQLink
Azure AI & copilot Studio, Open AI	Development and deployment platform for GenAI applications	X	X	Microsoft Israel, KPMG, Kyndryl, Malam-Team and more
Nuclia	RAG as a service platform + Financial packaged solutions by Proceed	X	X	Proceed (HMS)



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GenAI solutions and platforms in Israel Part 2

Product	Description	Platform	Solutions	Rep/Partners in Israel
Red Hat Openshift AI	LLMOps: LLM mng. environment	X		Red Hat Israel
WatsonX.ai	Training & deploying ML/GenAI models	X		IBM Israel. Partners: Nogamy, Matrix, one, Malam-Team, Commit, Aman-Eternity, Webtech, SQLink – Genius, Elad
Dataiku	Training & deploying ML/GenAI models	X		
Amazon's Bedrock, SageMaker	AI/GenAI Building platform (SageMaker AI), Gen AI serving platform (Bedrock)	X		Amazon Israel Kyndryl, Malam-Team, Commit etc.
Databricks' Mosaic	Platform for GenAI models	X		Databricks Israel
Google's Vertex	Training & deploying ML/GenAI models	X		Yael all Data, Kyndryl, KPMG, Malam-Team, Commit etc.
Oracle's OCI Generative AI, Cohere	Managed service for GenAI access, development and fine tuning	X		Oracle Israel, Matrix, SangIT



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On Premise GenAI solutions

Product	Description	Rep/Partners in Israel
PrivateGPT by Fujitsu	On Premise GenAI appliance	Kyndryl
Kal-Sense	On Premise option (Dell and Nvidia)	Kaleidoo by Bynet
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, Elad
Jeen.ai	On premise option Open shift ready	Jeen.ai
Oracle's OCI Generative AI	Managed service for GenAI access, development and fine tuning	Oracle Israel
Red Hat Open Shift AI	Kubernetes-native platform that streamlines development, deployment, and governance of GenAI models	Red Hat Israel
RAG - AGAT	AI on premise appliance	EMET Defense
HPE	Private Cloud AI	HPE, Deloitte
CommX		Commit
Wisery Labs	On Premise GenAI platform	



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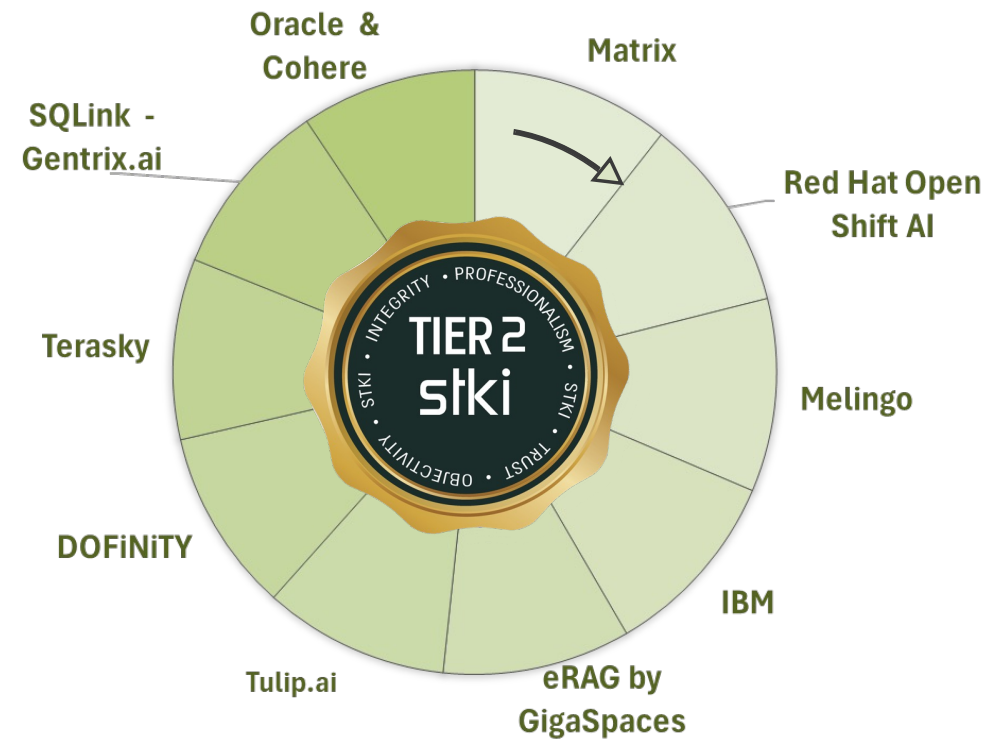
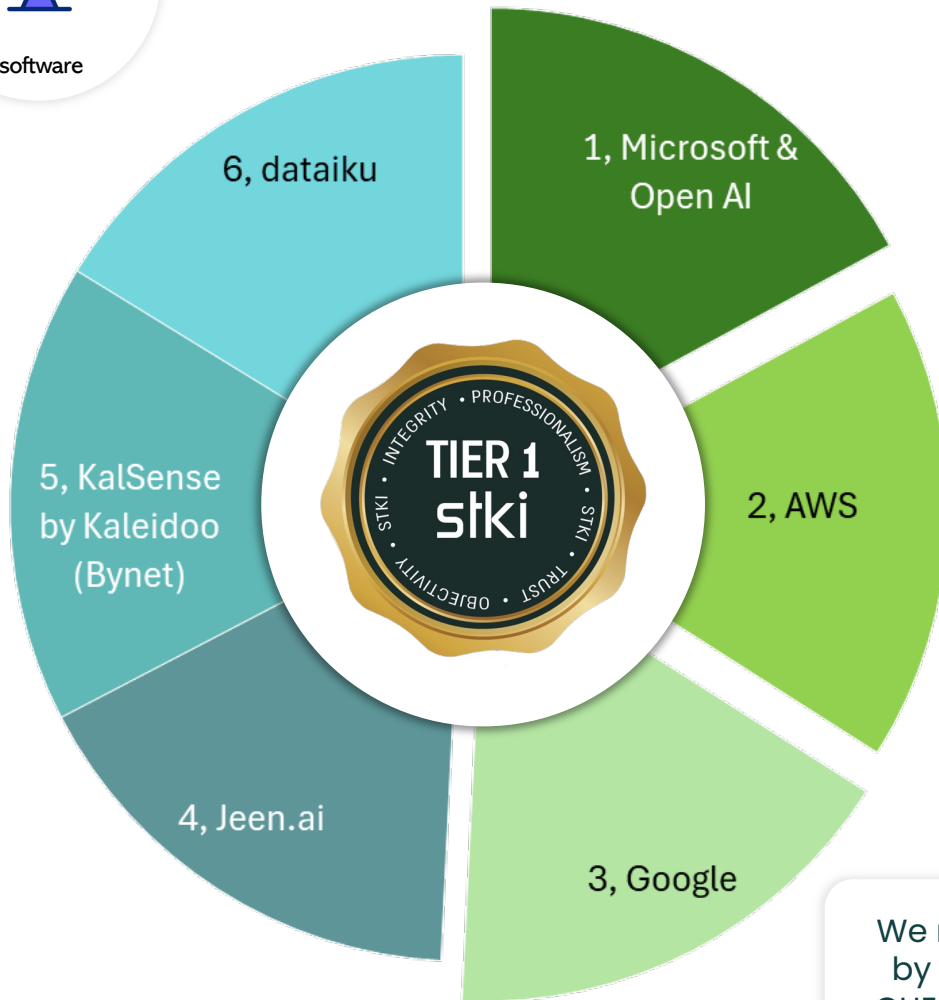


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Generative AI tools and platforms



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Packaged GenAI solutions for Contact Centers

Transcription and calls analysis for contact centers

Product	Description	Rep/Partners in Israel
Kal-Audio and Bynet-Up (ACE)	Transcription and Call Analysis for CC Also in ACE CC	Kaleidoo by Bynet, Bynet ACE
Elad Medical Transcription solution	Medical Transcription and call analysis	Elad
Jeen.ai	Transcription and call analytics for CC	
CoRep	Transcription and call analytics for CC	Matrix Babcom
Hear.ai	Transcription and Call Analysis for CC	
Maximizer	Transcription and Call Analysis for CC	Malam-Team
Verint	Transcription and Call Analysis for CC	Kyndryl, I.E Mittwoch
Audiocodes	Transcription and Call Analysis for CC	
Sumit	Transcription and Call Analysis for CC	Hilan-Ness Pro
CommX Expand	Transcription and Call Analysis for CC	Commit
Nice (+Nexidia)	Transcription and Call Analysis for CC	Nice
	Transcription and Call Analysis for CC	Aman Digital
	Transcription and Call Analysis for CC	Bleader
Other transcription solutions within CC platforms such as Genesys, Cisco etc.		



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Packaged GenAI solutions for Contact Centers

Service bots and assistants

Product	Description	Rep/Partners in Israel
Onvego	Service Agent Chatbot	Matrix Babcom
Alsera	Service Agent	EMET
Help.e	Service voice bot	
Gentrix	Service chatbot	Sqlink
Kal-Sense and Bynet-Up (Bynet ACE)	SaaS "GenAI applications" for Chatbots	Kaleidoo by Bynet, Bynet ACE
Botica by WebTech	Service agent chatbots	WebTech, Matrix
Jeen.ai	Service bot builder	
KMS	AI Knowledge-driven assistant	Aman
ClearMash	AI Knowledge-driven assistant	Difdoof, Knowledge
Verint	Voice bot, Chat bot	Kyndryl, I.E Mittwoch
Insait	Digital Assistant	Hilan-Ness Pro
Chatbot AI	Voice based service chatbot	Yael all Data
WINN AI	Sales and Revenue Operations assistant	Tir1
Packaged Service Agents within CRM suites: Salesforce AgentForce, Microsoft, Zoho, ServiceNow		



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Data Fabric solutions in Israel

Package	Description	Partners
Knowledge Discovery Platform	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



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Data Virtualization Tools

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



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Semantic data discovery

Product	Description	Rep/Partners in Israel
Illumex	Semantic Data Fabric	Matrix, Hilan-Ness Pro
Jedify	Semantic Fusion	Matrix
eRAG by Gigaspaces	Data retrieval and language processing Semantic reasoning of operational data	Gigaspaces



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Enterprise Management Systems Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
ERP	95	15.79%	110	13.64%	125	-8.00%	115	17.39%	135	3.70%	140	5.71%	148	8.11%	160
CRM	62	9.68%	68	17.65%	80	6.25%	85	-2.35%	83	-1.20%	82	2.44%	84	7.14%	90
HR/ Talent Mgmt./ LMS	28	25.00%	35	22.86%	43	-11.63%	38	10.53%	42	14.29%	48	12.50%	54	11.11%	60
Marketing Automation Software	10	50.00%	15	33.33%	20	-10.00%	18	-5.56%	17	-5.88%	16	6.25%	17	5.88%	18
TOTALS	195	16.92%	228	17.54%	268	-4.48%	256	8.20%	277	3.25%	286	5.94%	303	8.25%	328



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Values in Million USD



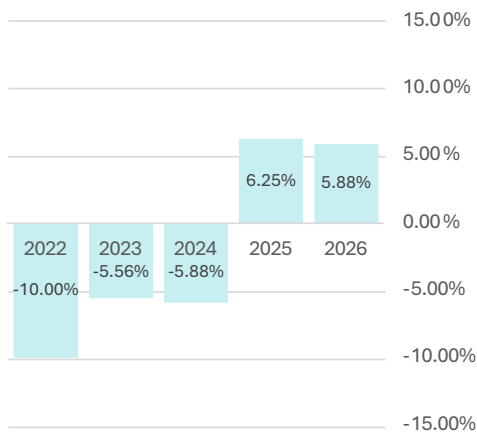
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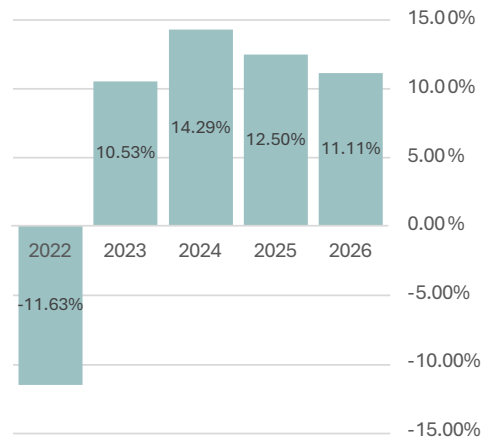
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Enterprise Management Systems Market 2022-2026

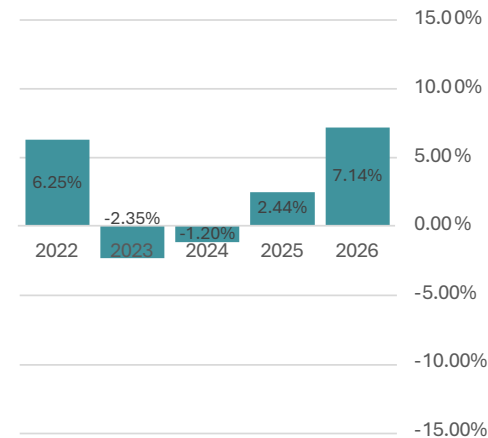
Marketing Automation Software



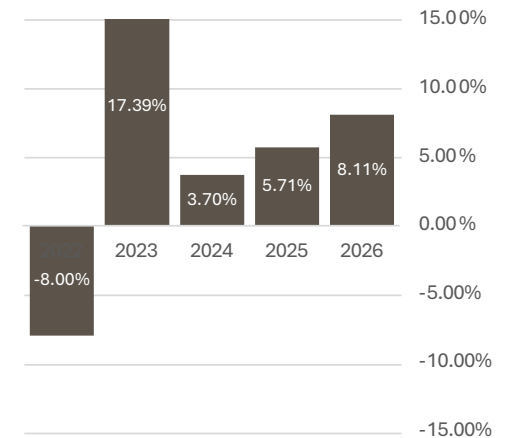
HR/ Talent Mgmt./ LMS



CRM



ERP



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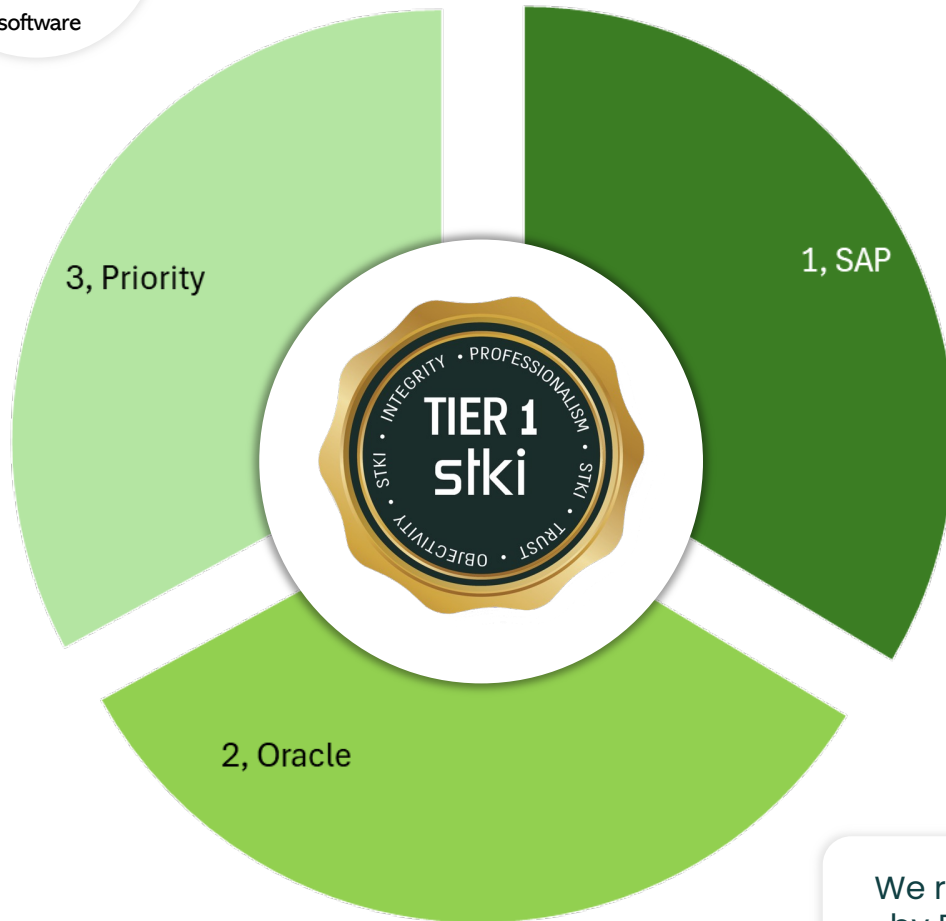


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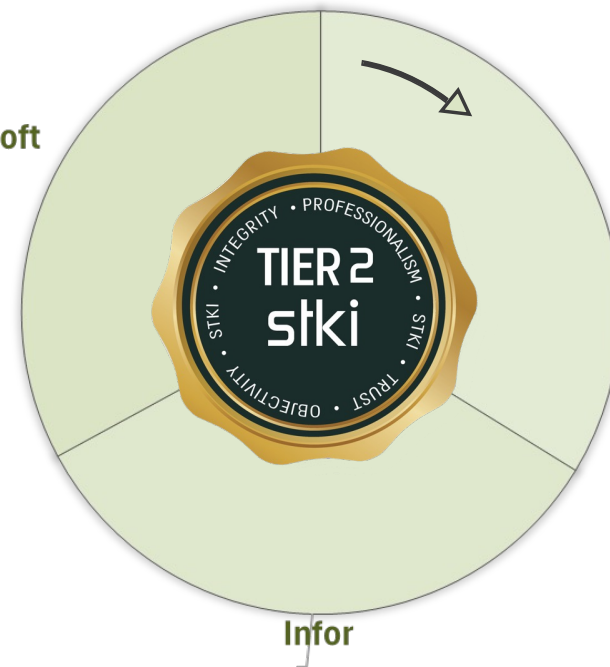
ERP Packages



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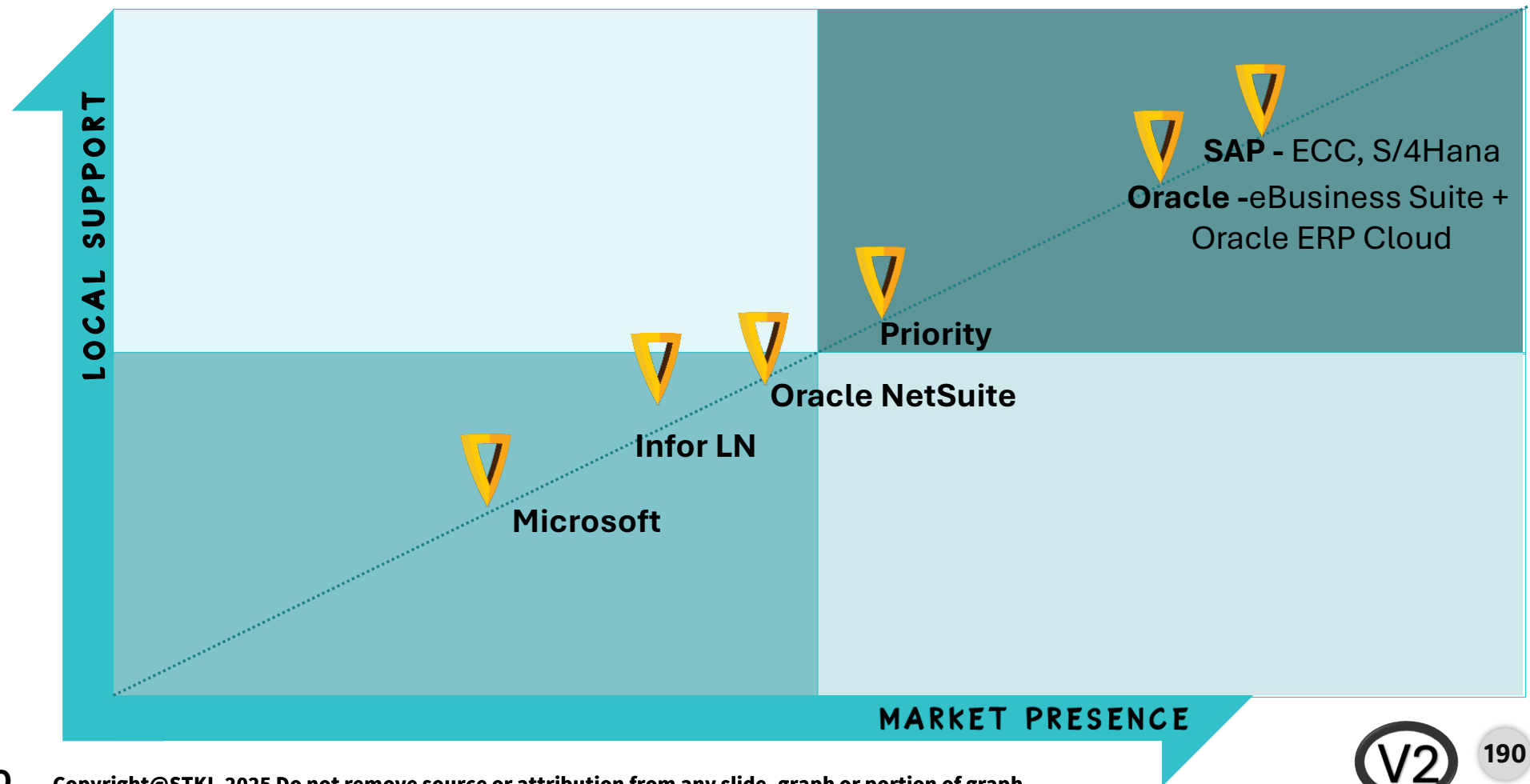
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Enterprise ERP 2025

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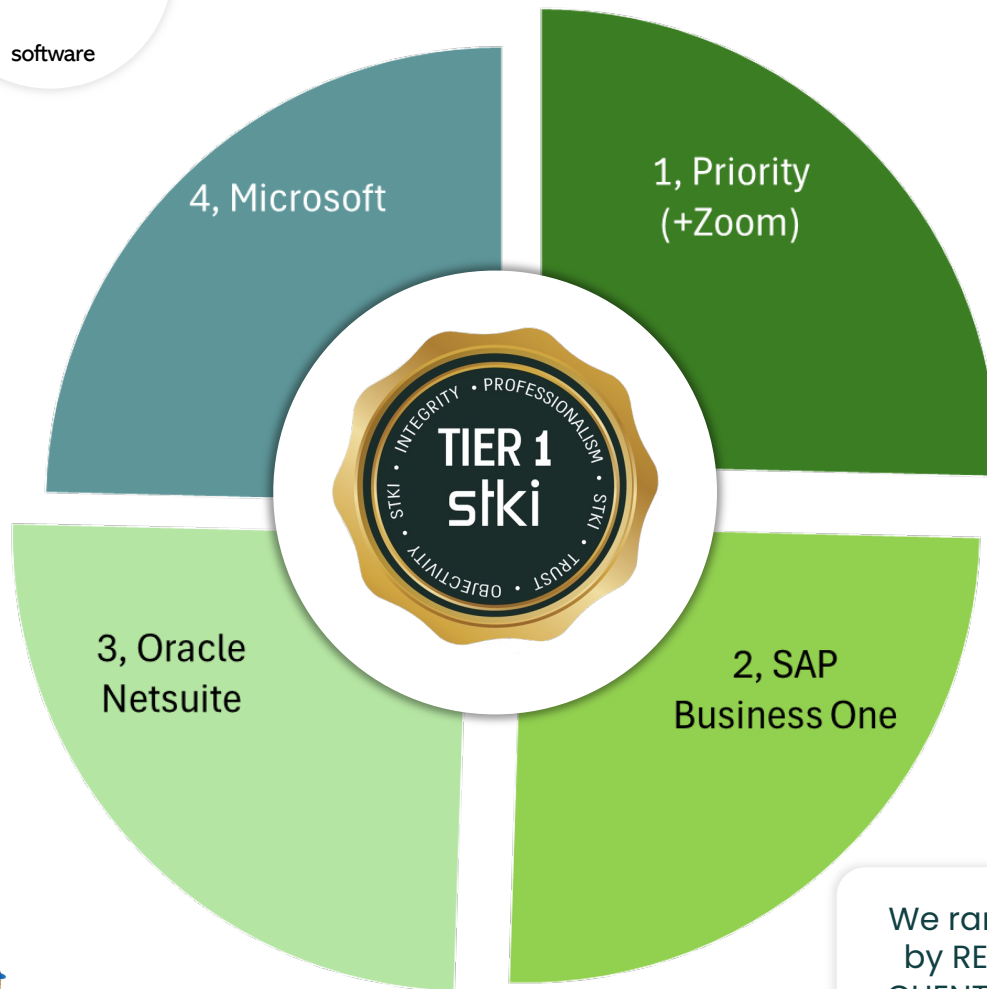


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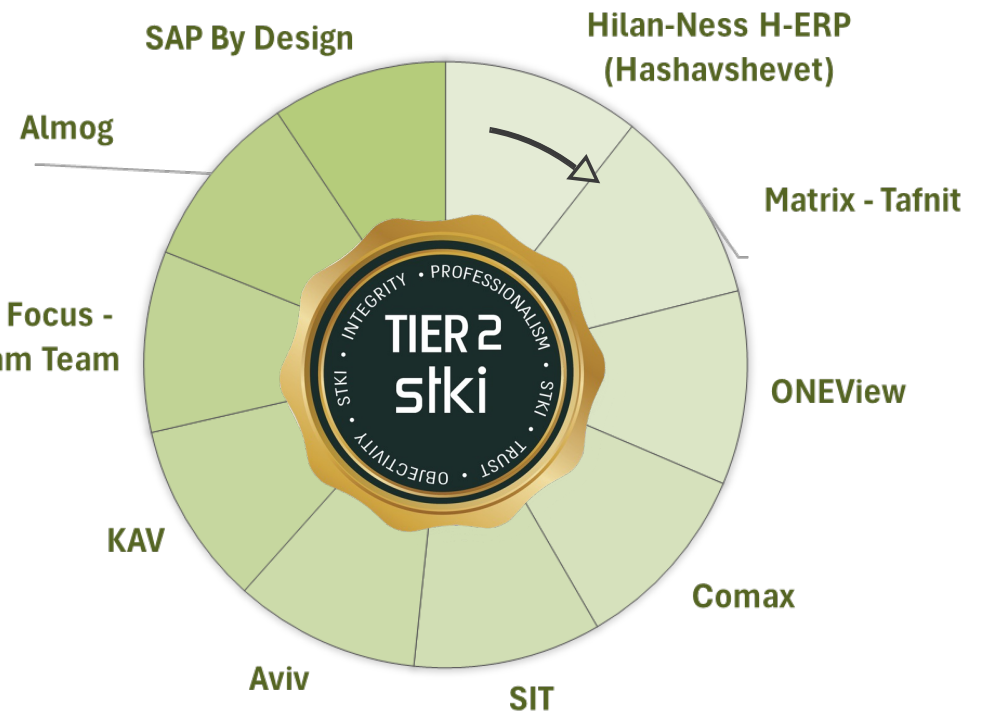
ERP Mid Market



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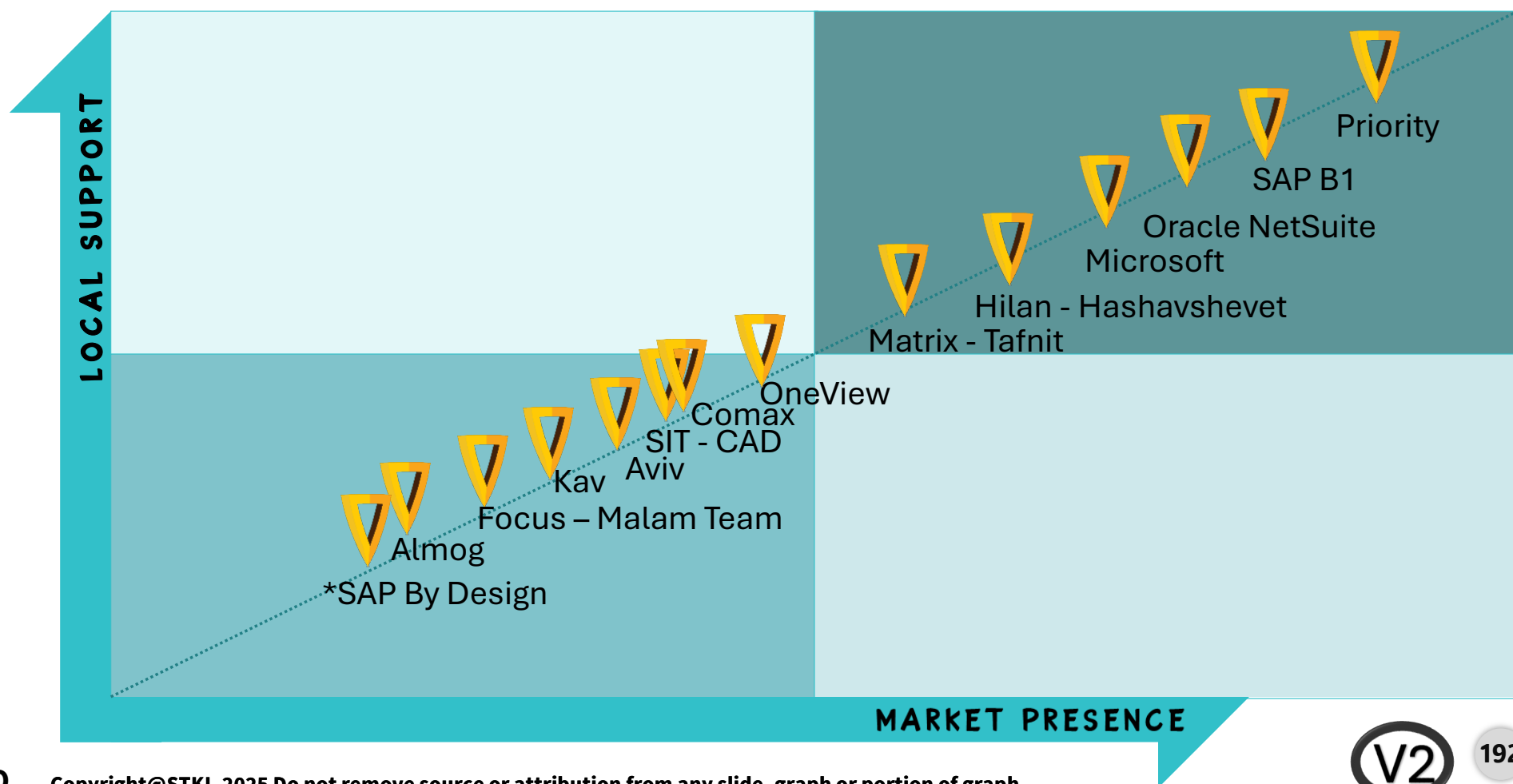
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Mid-Market ERP 2025

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ERP Integrators Part 1

Package	Israel Rep	Integrators
Oracle ERP cloud Netsuite e-Business Suite	Oracle Israel	Oracle ERP Cloud: Oracle consulting, OneI, Yael Group, PwC, Deloitte Oracle Netsuite: Netcloud, OneI, Deloitte ,PwC, Top Group, WinIT, Zu Consulting, SuiteTech, Bsuite, iCloudius Oracle eBusiness Suite: Yael Group, DXC, PwC, TATA (TCS Israel), ONEI
SAP	SAP	Hilan-Ness, IBM, ONE (Teldor+Xact + Advantech), Malam-Team, Deloitte,PwC, TATA (TCS Israel), Accenture, Convista Israel (SAP for Insurance), ValuePlus, abra, Kyndry, Inford-Team
SAP Rise		OneI, Malam-Team, Hilan-Ness
SAP Grow		Hilan-Ness, Deloitte, ERP Logic, KPMG, Alfacloud, Allegro-Pro
SAP Business One		Top Group (Ziv Systems + RELS), Complete, Menahel4U, BDO Ziv Haft, Xioma, Segment, UPTech
E-Tafnit, Tafnit 7	Matrix	Matrix, Alpha Consultants
QAD EE	SIT	SIT, ManofIT, Tirosh
Priority	Priority	Matrix - Medatech, OneI - FBC, Agrosoft, EDP, eBase, Prioricity, EliteERP, Infobase, Gap, Tirosh, Eshkol, IT Backoffice, Pitronim, SIBUD, Login, Tadiad, Epilog, ERP Guru, Dsi, T.G.Net, Open Mind, Yael Group (Tulip), Kama, Priori-team, Rotline, Abra, Coralys
Infor (M3)	Intentia Israel	Intentia Israel
ONEIERP	ONEI	ONEI + Freelancers



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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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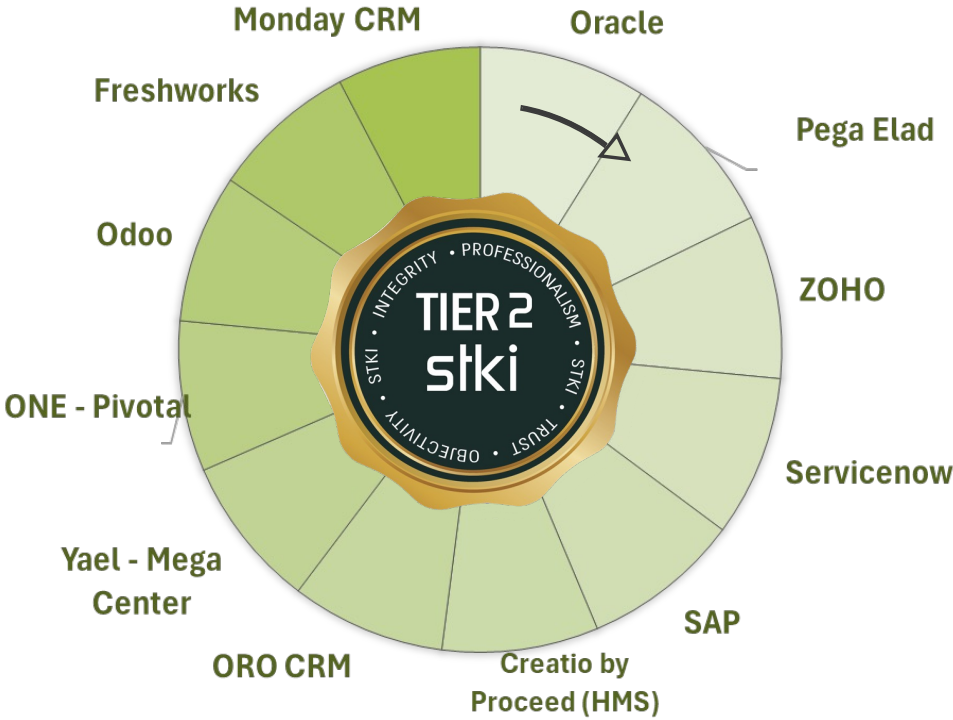
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CRM Platforms



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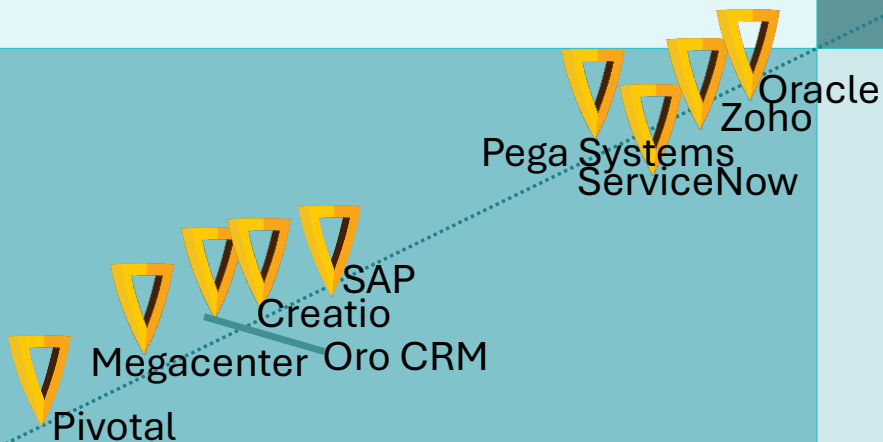
CRM Platforms 2025

Presence & Support in Israel



Monday CRM
Freshworks
Odoo

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

Package	Israel rep.	Integrators
Oracle Sales Cloud & Service Cloud	Oracle Israel	Oracle Consulting, Yael, one, Deloitte
Oracle – Siebel		Yael, TCS, Matrix
Oracle – Peoplesoft		Matrix
Salesforce	Salesforce Israel	AllCloud, Elad Yael (Cloudtech), iCloudius, one, Accenture, Deloitte, Malam-Team, Accenture, MYND, Matrix, EMET – Unitask (WeDo), abra, Aman-Asperi, PWC
Microsoft CRM 365	Microsoft Israel	Elad, Matrix, Malam-Team, abra, Biz Aid, Softpro, MYND
ServiceNow CSM Service and Sales/OM	ServiceNow	one (Dicomano), Ness TSG, Bizflow, Bynet, Deloitte, Thirdera
Zoho CRM	Zoho Israel	Tamayo, MLY, Holistic



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CRM Packages (embedded AI) in Israel - Part 2:

Package	Israeli Rep.	Integrators
SAP CM (Customer Mng) S4	SAP Israel	abra, Malam-Team, AKT, one, EMET – Unitask (Innova)
SAP Service and Sales Cloud		abra, SAP
MEGA Center	Yael	Yael
Pivotal	one	one
Odoo	Lalynetech	Lalynetech
Freshworks	Malam-Team	Malam-Team, Matrix
Oro	abra	abra, Deloitte, Codeoasis
Pega	Elad	Elad
Creatio	Proceed (HMS)	Proceed (HMS), Shita
Hubspot CRM		



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Multi Channel Platforms

Package	Israeli Rep.	Integrators
Commbox	Commbox	Commbox PS
Glassix	Consist	Consist, Elad, Matrix, I.E Mittwoch
99Digital	99Digital	99Digital, Bynet - Partner
7Twenty	7Twenty	
Consolto video chat		Matrix
Simplechat (for on premise MSFT CRM)	Elad	Elad
Microsoft Multi Channel	Microsoft Israel	Matrix, Elad, abra, Biz Aid, Malam-Team
Salesforce Digital Engagement	Salesforce Israel	one, Aman-Asperii, Elad and other SF Integrators, Yael
Zoho	Zoho Israel	Tamayo, Holistic, MLY
Infobip		Be2See (Emet)
Creatio	Proceed (HMS)	Proceed (HMS)
Twilio	Aman	Aman

Standalone
multi channel

Part of CRM/
Marketing

CPaaS & CC



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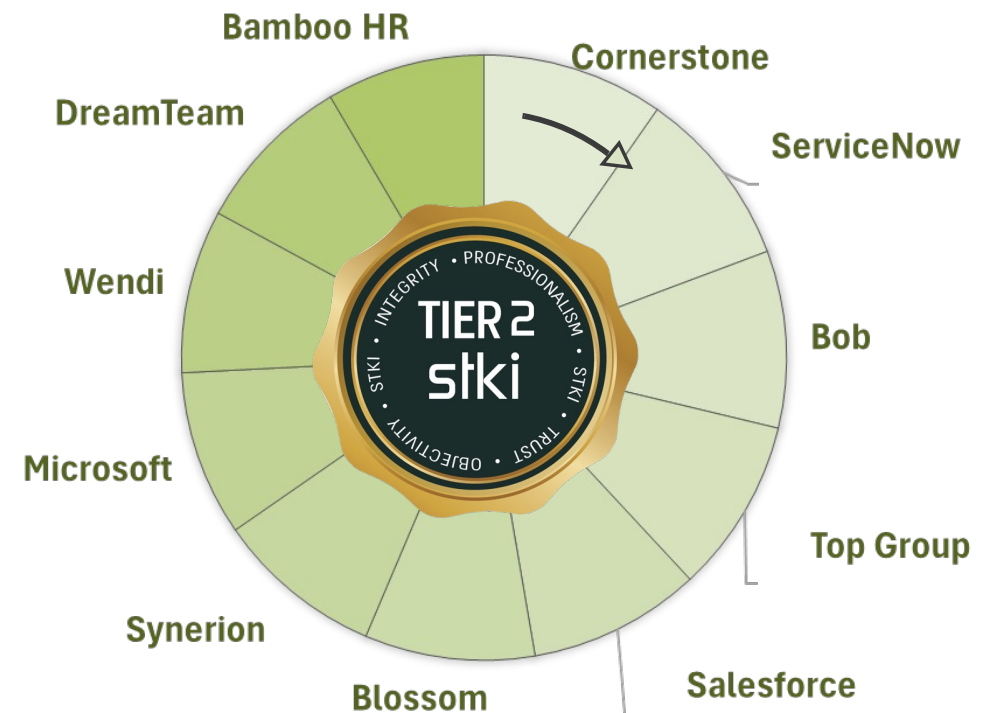
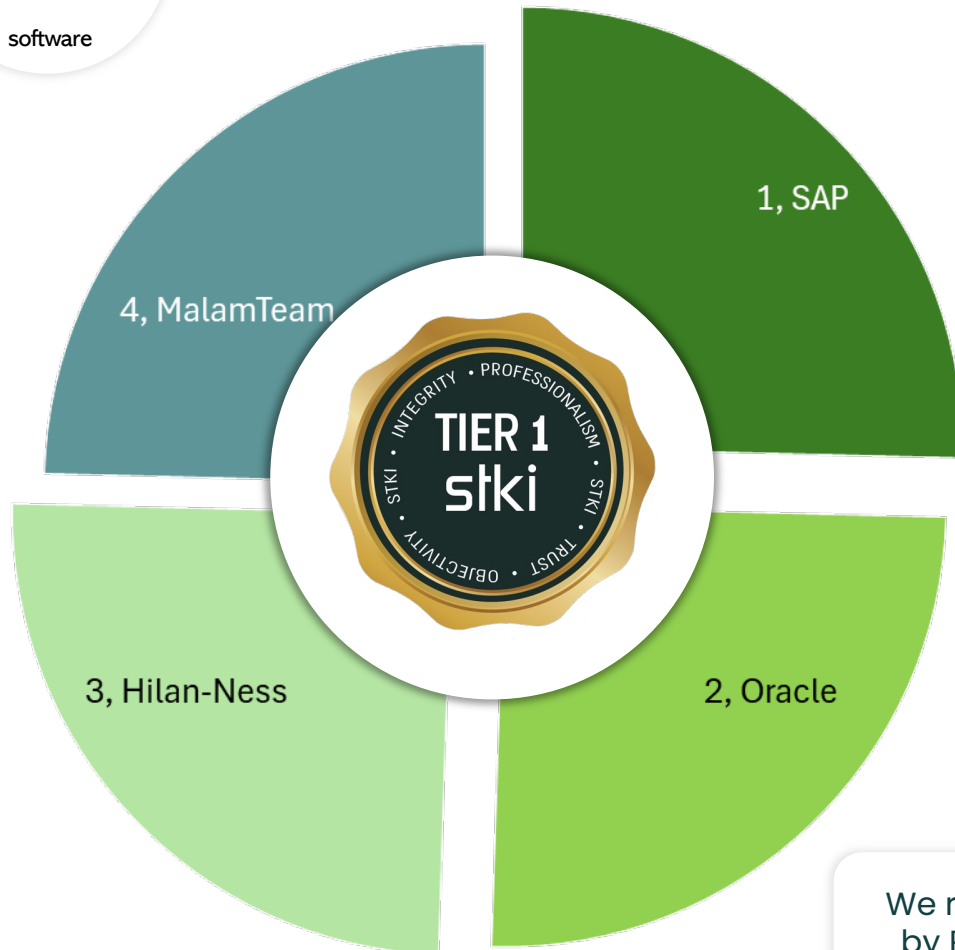
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HR/ Talent Mgmt./ LMS Packages



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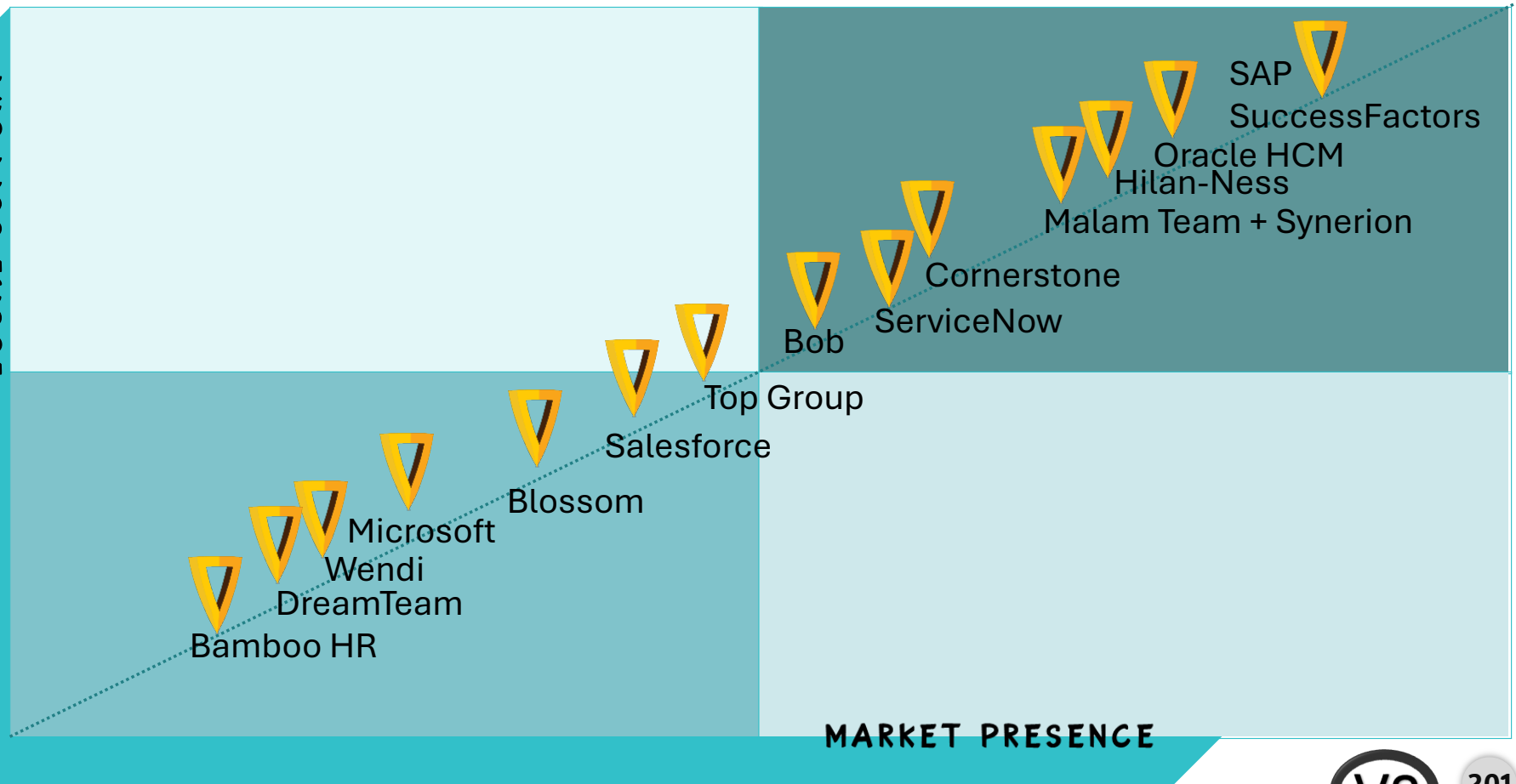
HR, Talent Mng. Payroll and LMS 2025

Presence & Support in Israel



Hrcules By
Malam Team
DreamTeam

LOCAL SUPPORT



MARKET PRESENCE



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HR, Talent Mng. Payroll and LMS

Package	Category	Rep. in Israel	Integration partners
Oracle Fusion Cloud HCM	Core HR, Payroll, Talent Mng.	Oracle Israel	Emet- Unitask, Oracle consulting, SmartBrain, TopVision, PwC, ONE, Deloitte
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 + Hrcules	Core HR, Payroll, Talent Mng.	Malam-Team	
CornerStone	Talent Management	Matrix	
Synerion (Malam Team)	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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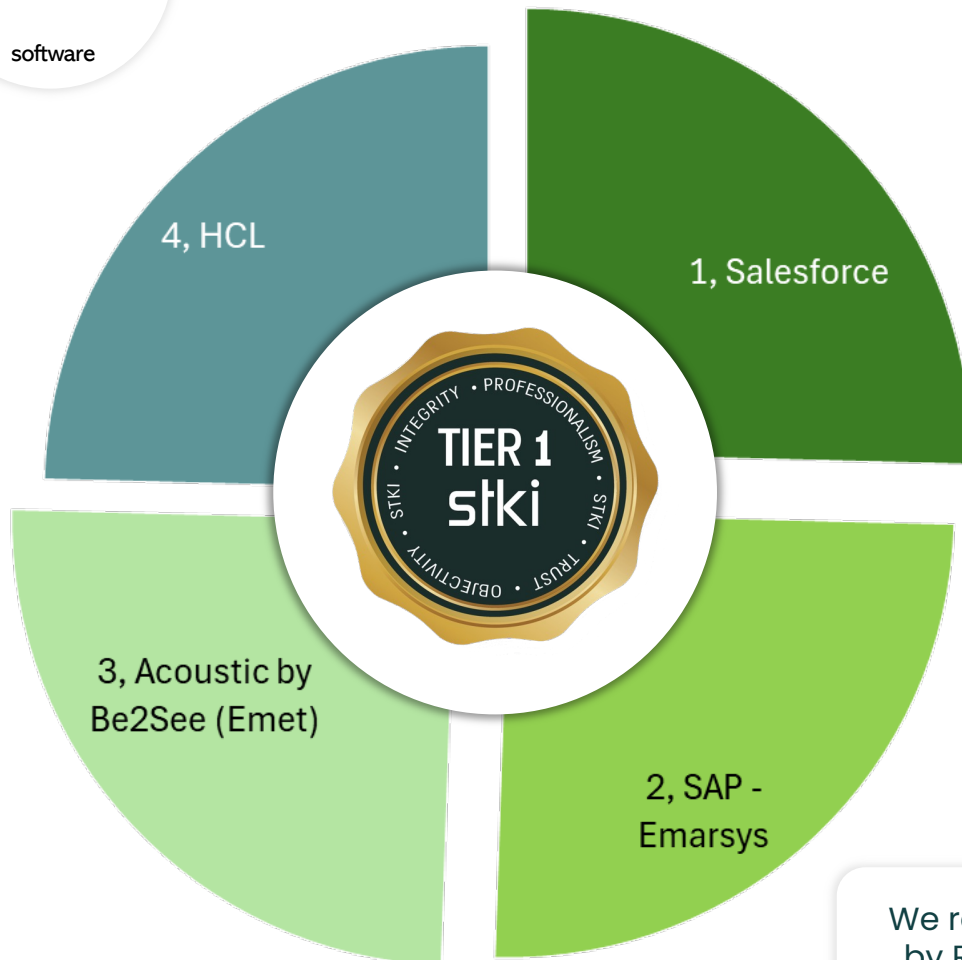
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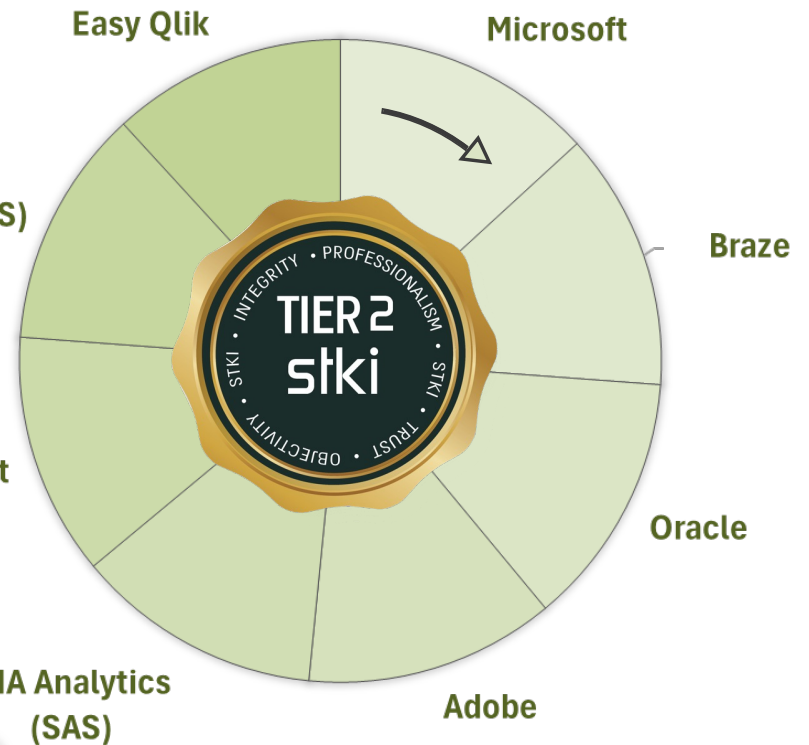


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Marketing Automation Software



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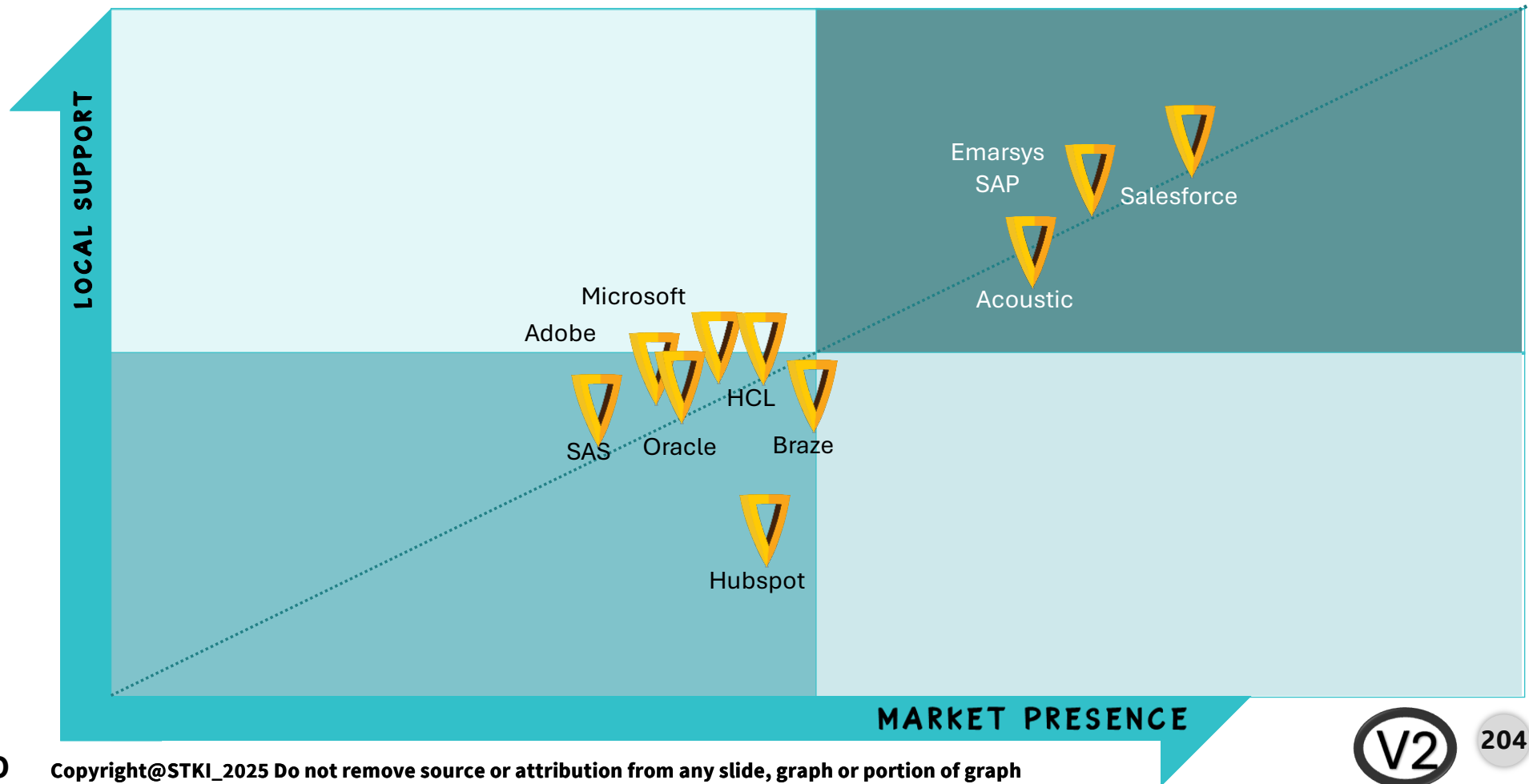
Marketing Automation Suites – 2025

Presence & Support in Israel



ActiveTrail
Optimove
Creatio

LOCAL SUPPORT



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CM and Marketing Automation Platforms – Part 1

Package	Israel rep.	Integrators
Salesforce Marketing Cloud	Salesforce Israel	Deloitte (+ Weku), Elad, AllCloud, Yael, Aman-Asperii 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), Yael all Data	Be2see (Emet Group), Yael all Data
HCL: Unica Campaign Management		Be2see (Emet Group), Gstat, Yael all Data
Adobe Experience Platform & Customer Journeys (+Marketo for B2B)	Adobe Israel	Deloitte
SAS CI 360	Mia computers (SAS)	Yael
Oracle	Oracle Israel	Yael all Data, iCloudius, Oracle Consulting
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	Emarsys: SAP Israel, Be2see, one-Saban, abra
ActiveTrail	ActiveTrail	one-Saban, Yael all Data
Braze	Hippocampus	Hippocampus, Yael all Data
Hubspot		Agencies
Pega Marketing Automation	Elad	Elad
SalesManago	Signature-IT	Signature-IT
Creatio	Proceed (HMS)	Proceed (HMS)



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Personalization tools

Package	Rep. in Israel	Integrators
Insider (Multichannel personalization)	Be2See (Emet)	Be2See (Emet)
Maxymiser	Oracle Israel	
Dynamicyield		
Adobe Target	Adobe Israel	Deloitte Israel
Braze	Hippocampus	Hippocampus, Yael all Data
Sap Emarsys customer engagement platform	SAP Israel	
Salesforce	Salesforce Israel	Yael
Blings – personalized video	one-Saban	one-Saban
Optimove	Optimove	Be2See (Emet)



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Customer Data Platforms (CDP) Players in Israel

Company	Product	Partners
SAP	CDP & CDC	Be2see (Emet), one – Saban, abra, Codeoasis
Adobe	CDP Real Time CDP	Deloitte Israel
Oracle	CX Unity	Oracle Consulting
Microsoft	Customer data Insights	MSFT partners
Salesforce	Data Cloud	SF partners
Zigit (SQLink)	CIP :Customer Intelligence Platform	SQLink
Optimove	Real-time CDP	Be2See (Emet)



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Business Application Systems Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Contact Center and Multi channel engagement tools	50	16.00%	58	6.90%	62	-19.35%	50	8.00%	54	11.11%	60	13.33%	68	13.24%	77
E-Commerce Platforms	10	50.00%	15	33.33%	20	-25.00%	15	-6.67%	14	14.29%	16	18.75%	19	21.05%	23
Web Content Management Platforms	20	7.50%	21.5	-6.98%	20	-15.00%	17	11.76%	19	10.53%	21	14.29%	24	16.67%	28
PLM Systems	5	100.00%	10	60.00%	16	-6.25%	15	6.67%	16	12.50%	18	11.11%	20	15.00%	23
Blockchain platforms	5	6.00%	5.3	9.43%	5.8	-65.52%	2	-95.00%	0.1	0.00%	0.1	0.00%	0.1	1900.00%	2
GIS Platforms	42.5	3.53%	44	2.27%	45	4.44%	47	4.26%	49	12.24%	55	14.55%	63	12.70%	71
IOT tools and platforms	5	60.00%	8	25.00%	10	50.00%	15	26.67%	19	5.26%	20	10.00%	22	9.09%	24
TOTALS	137.5	17.67%	161.8	10.51%	178.8	-9.96%	161	6.27%	171.1	11.10%	190.1	13.68%	216.1	14.76%	248



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Values in Million USD

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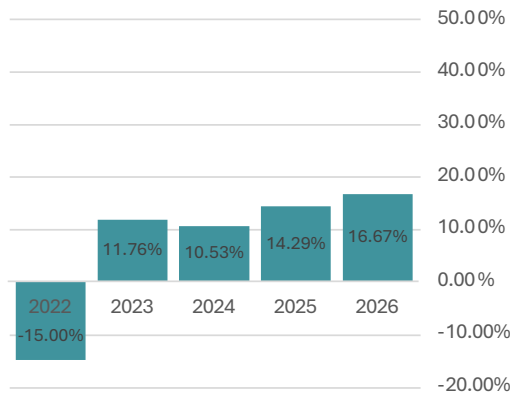
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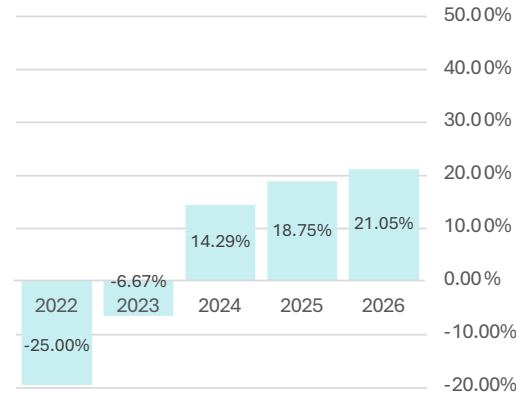
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Business Application Systems Market 2022-2026

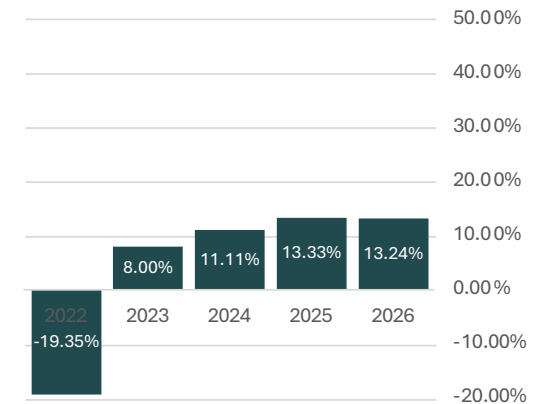
Web Content Management Platforms



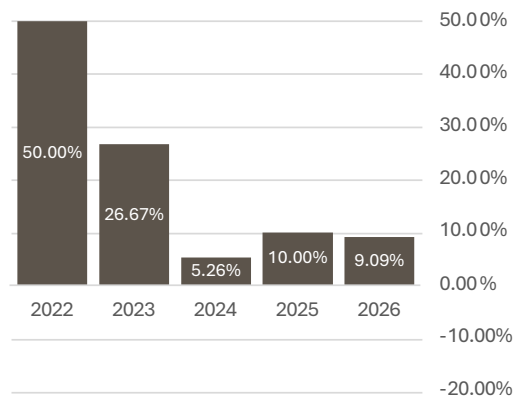
E-Commerce Platforms



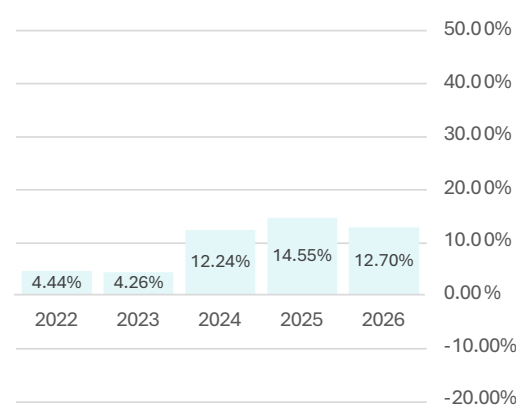
Contact Center and Multi channel engagement tools



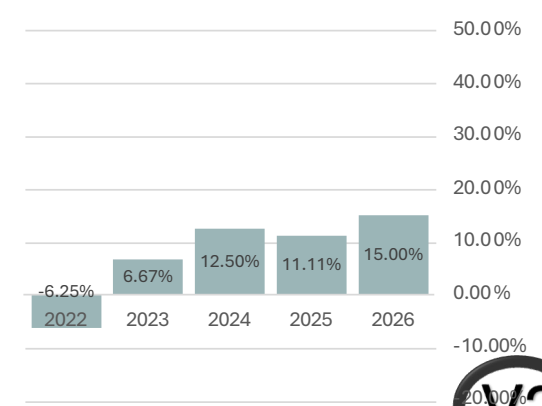
IOT tools and platforms



GIS Platforms

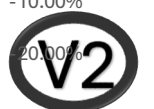


PLM Systems



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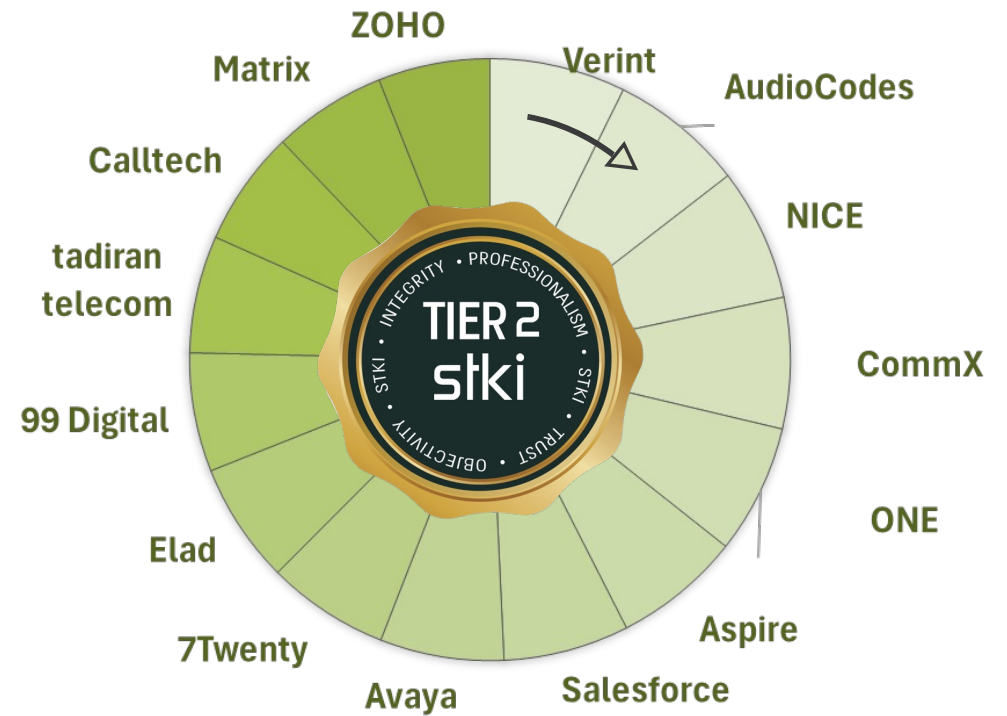
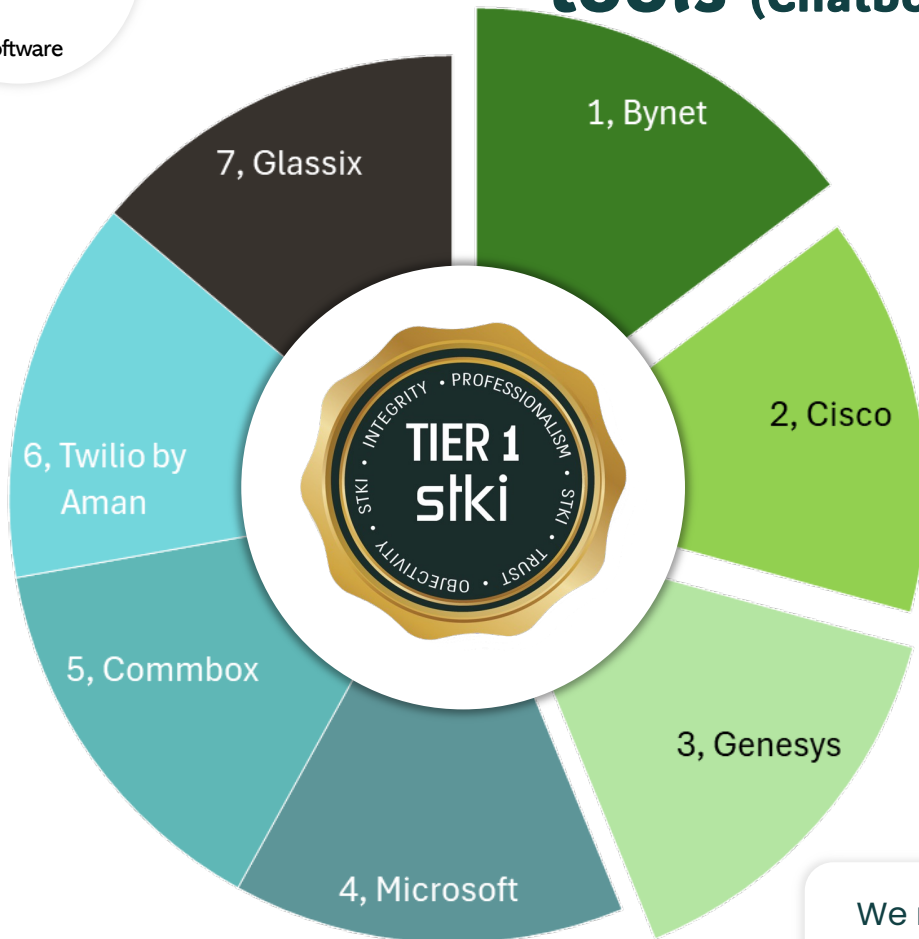


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Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc....)



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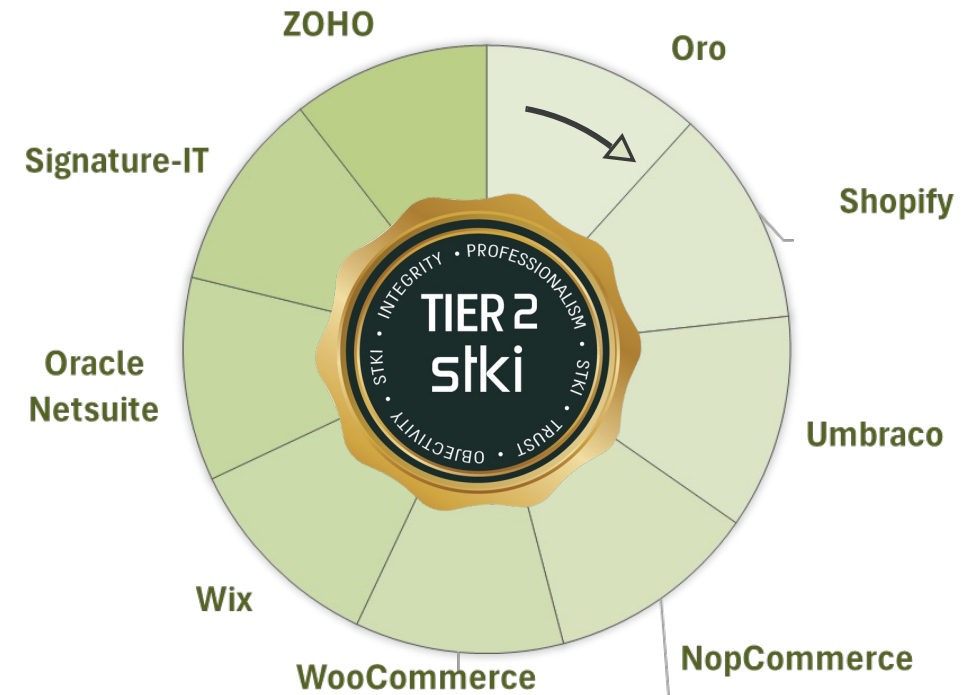
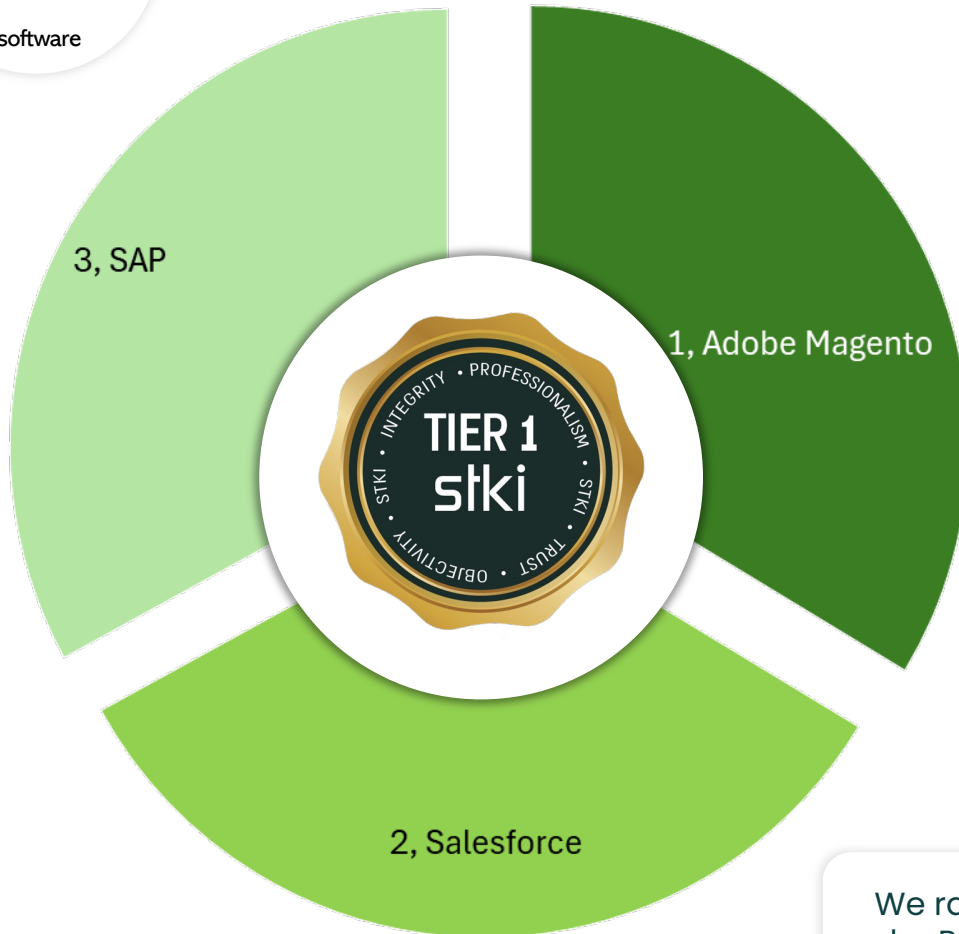


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E-Commerce Platforms



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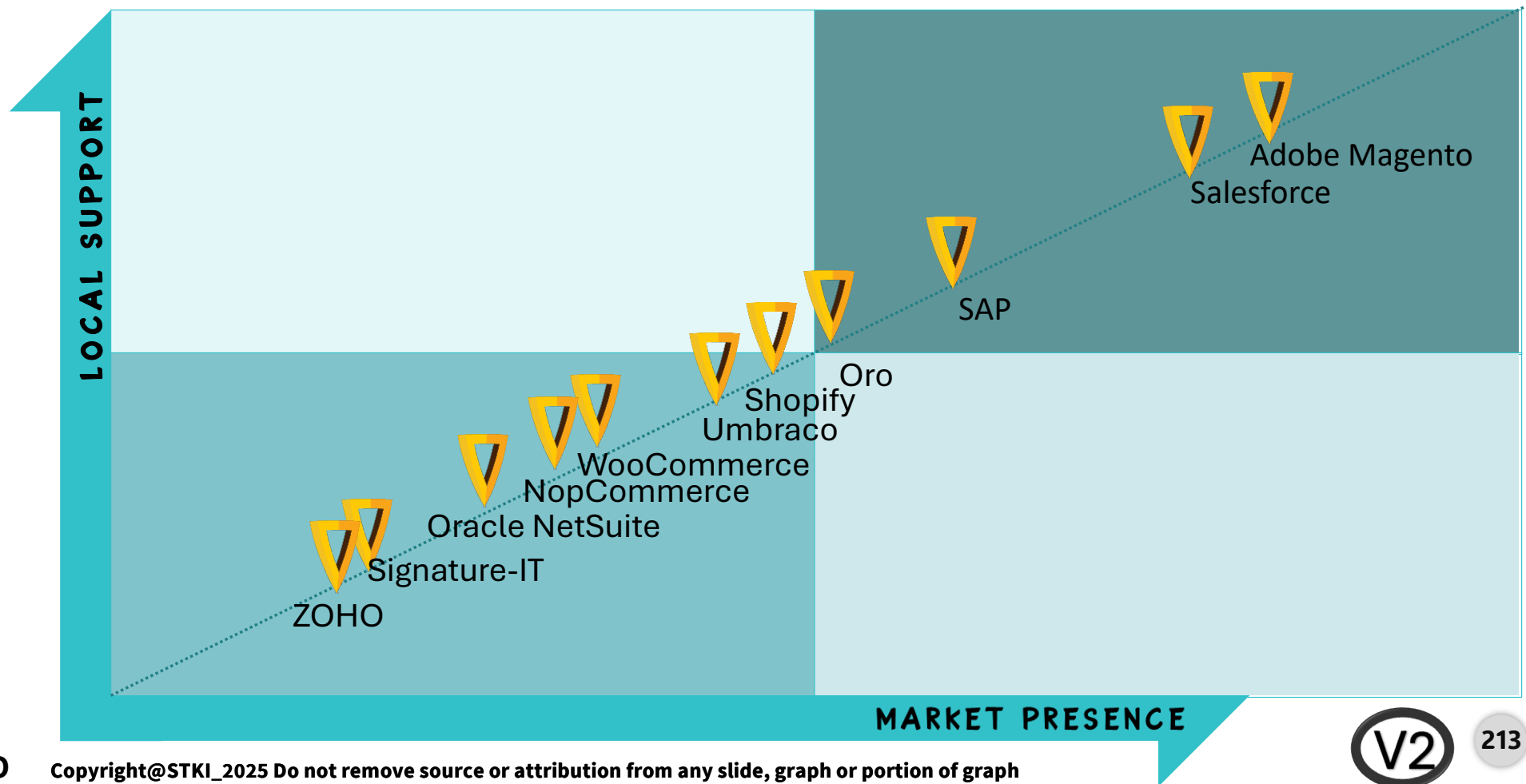
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eCommerce - 2025

Presence & Support in Israel



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



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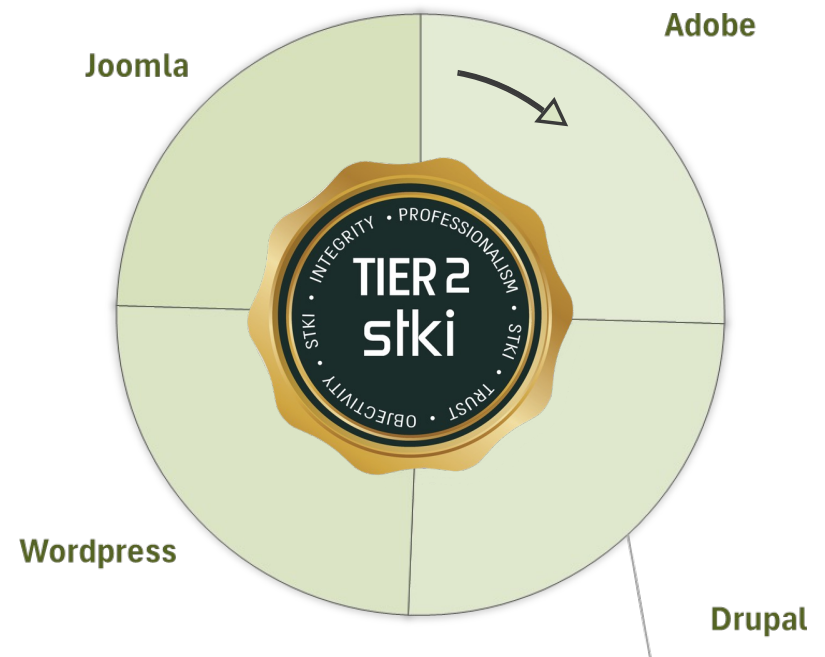


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Web Content Management Platforms



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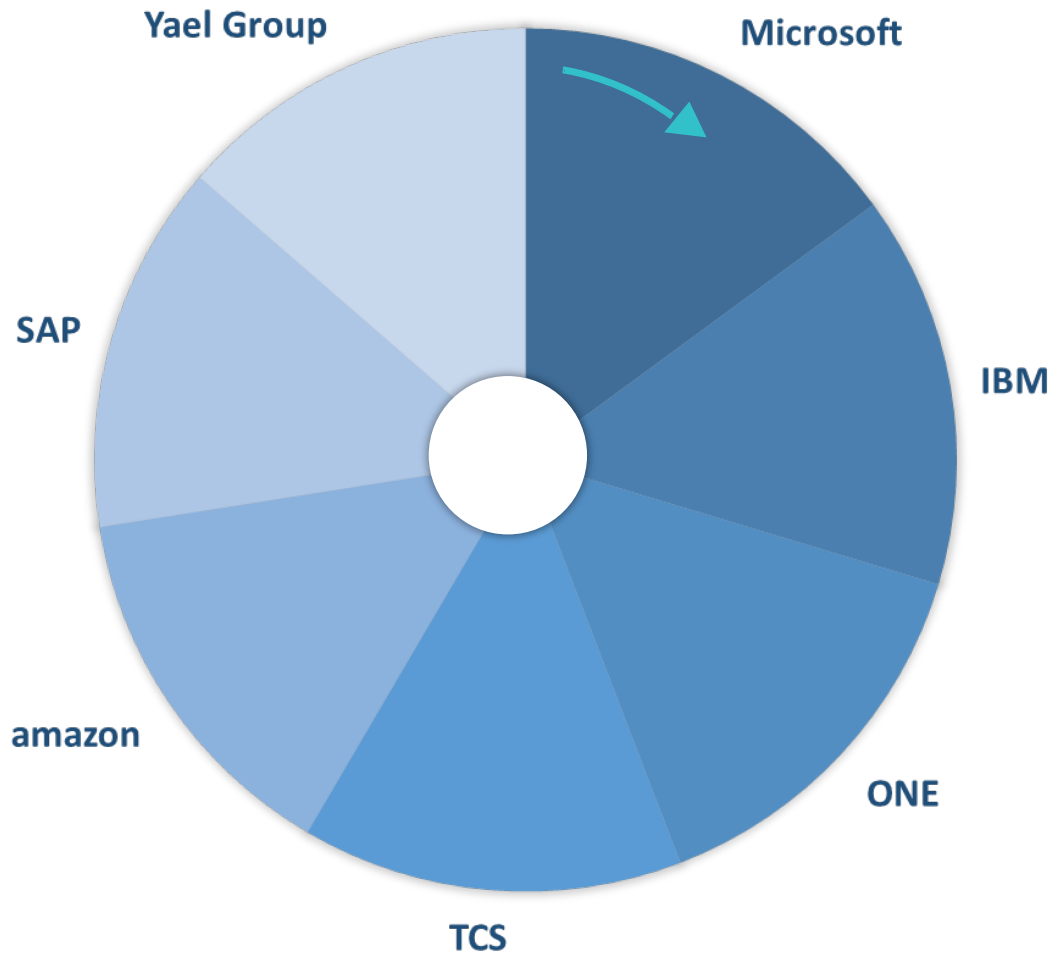
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Blockchain Platforms



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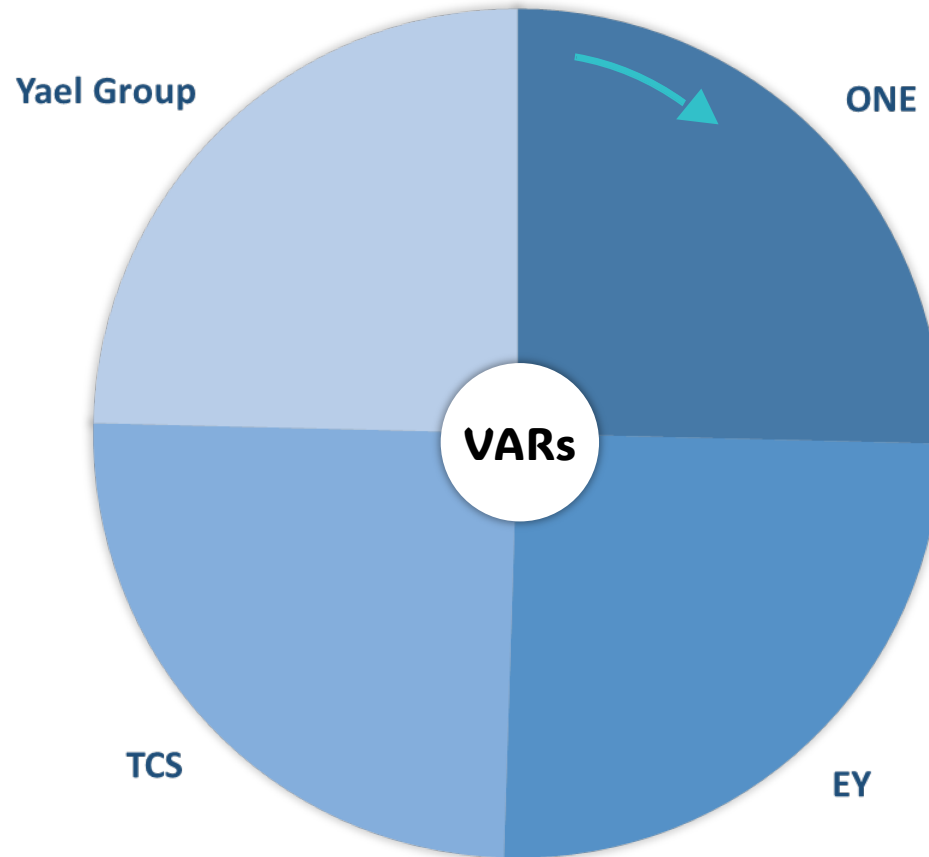
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Blockchain Platforms & VARs



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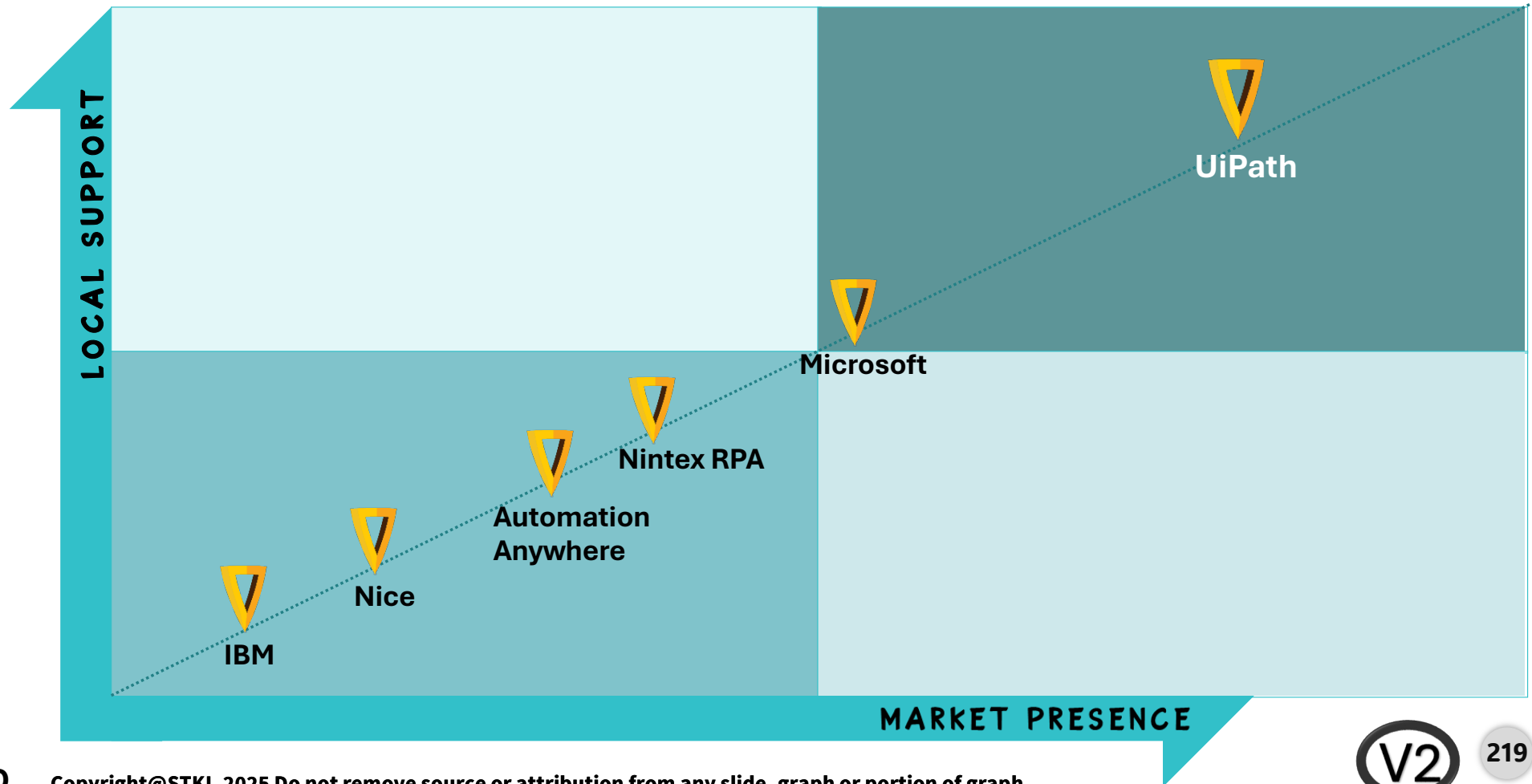
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RPA Israeli Market Positioning– 2025

Presence & Support in Israel



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RPA Tools & Integrators in Israel 2025

Integrators

UiPath

HMS, EzROI, Valor, ABP, EY, KPMG, Ness, Aman, Matrix, Bynet

Microsoft RPA (Power Automate)

Malam, Matrix, Ness, Elad, KPMG, BizAid

Nintex RPA (Formerly Kryon)

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



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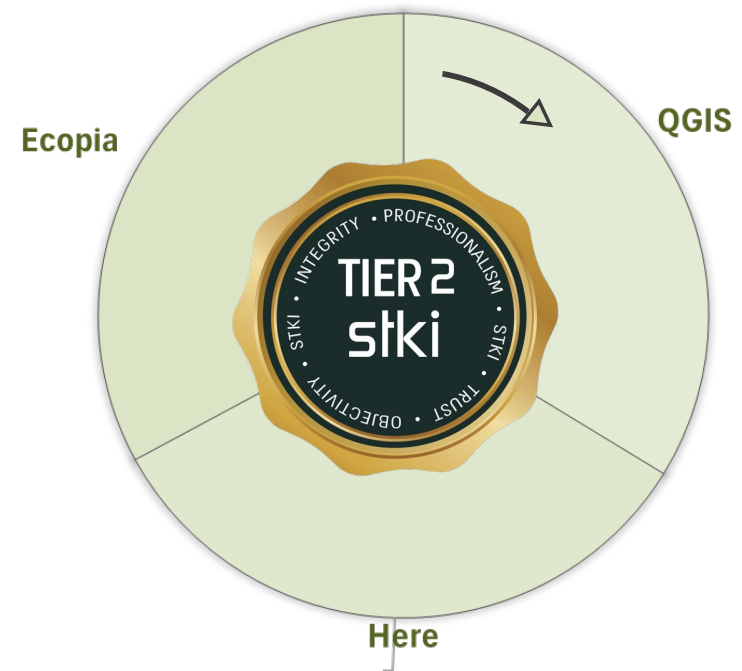


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GIS Platforms



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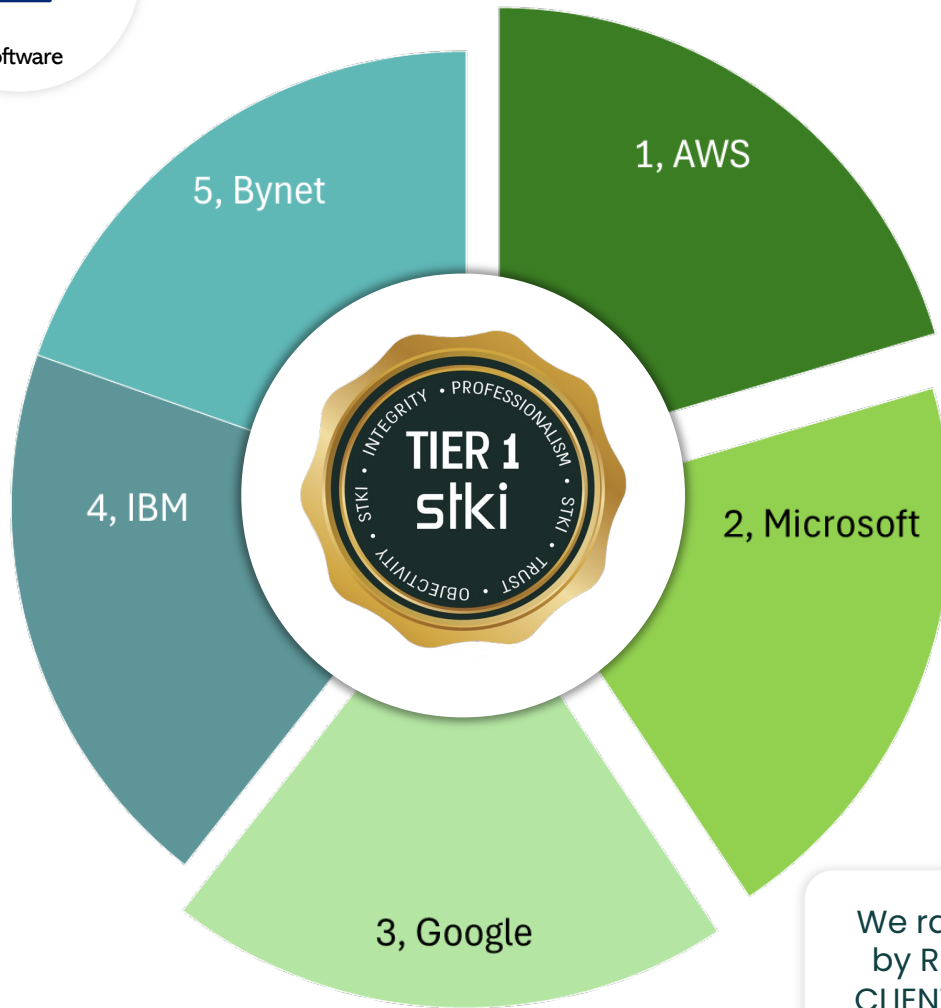


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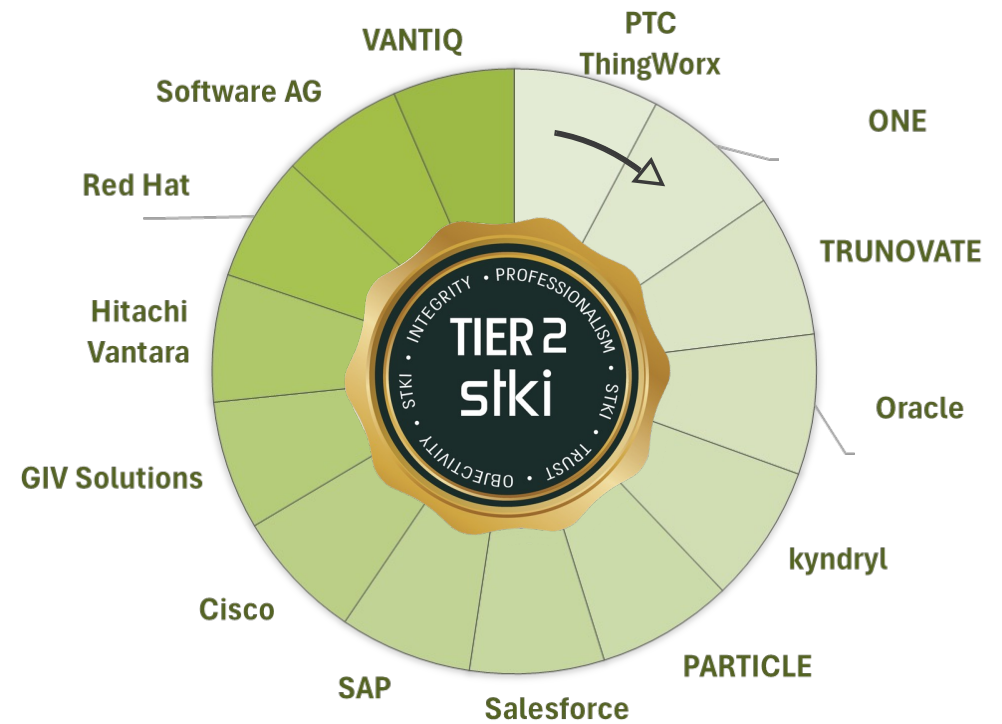
IoT Tools and Platforms



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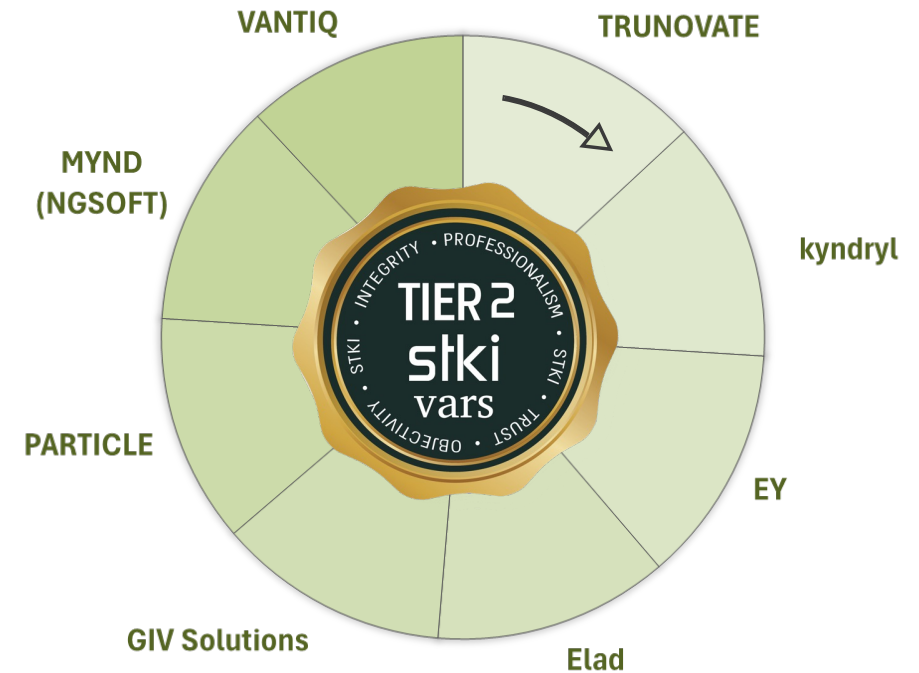
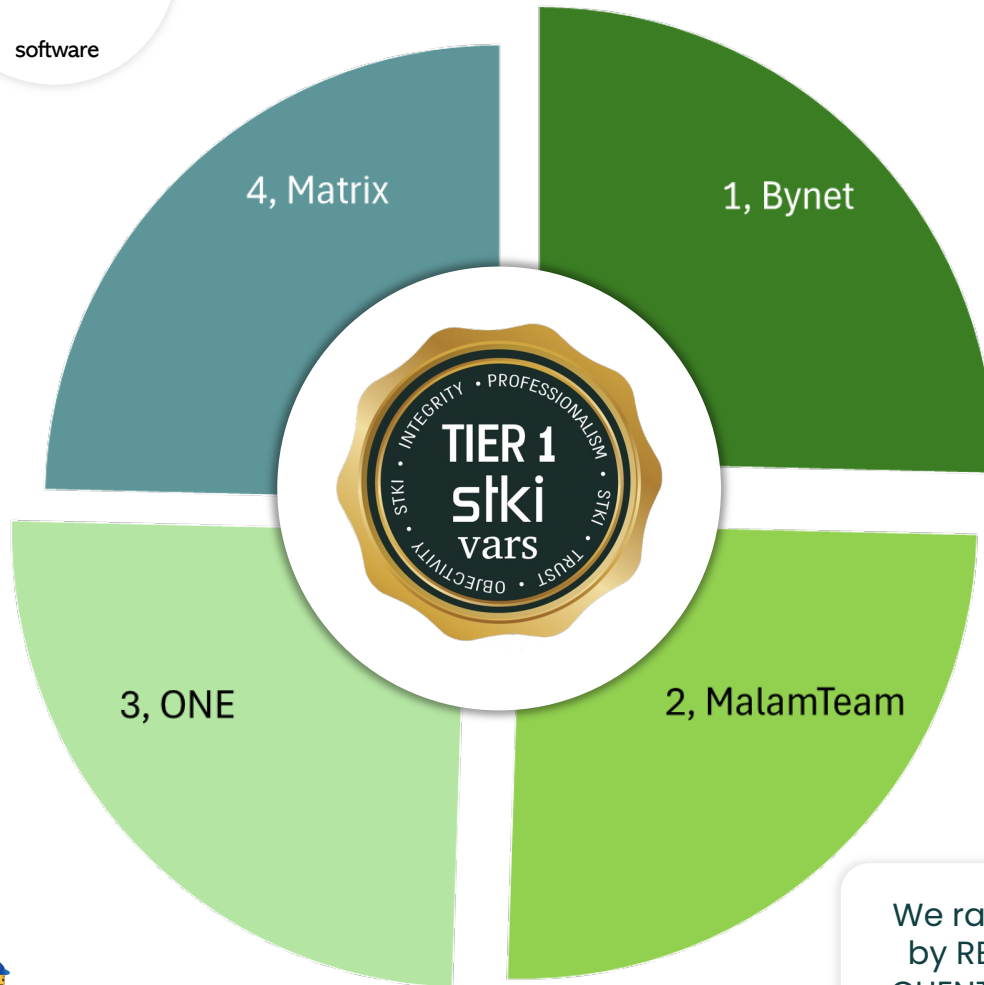


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IoT Tools and Platforms VARs



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Automation and AI Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
RPA Platforms	23	17.39%	27	25.93%	34	11.76%	38	18.42%	45	15.56%	52	13.46%	59	10.17%	65
Generative AI tools and platforms									56	-94.64%	3	66.67%	5	100.00%	10
Agentic AI tools and platforms													5	80.00%	9
TOTALS	23	17.39%	27	25.93%	34	11.76%	38	165.79%	101	-45.54%	55	25.45%	69	21.74%	84



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Values in Million USD

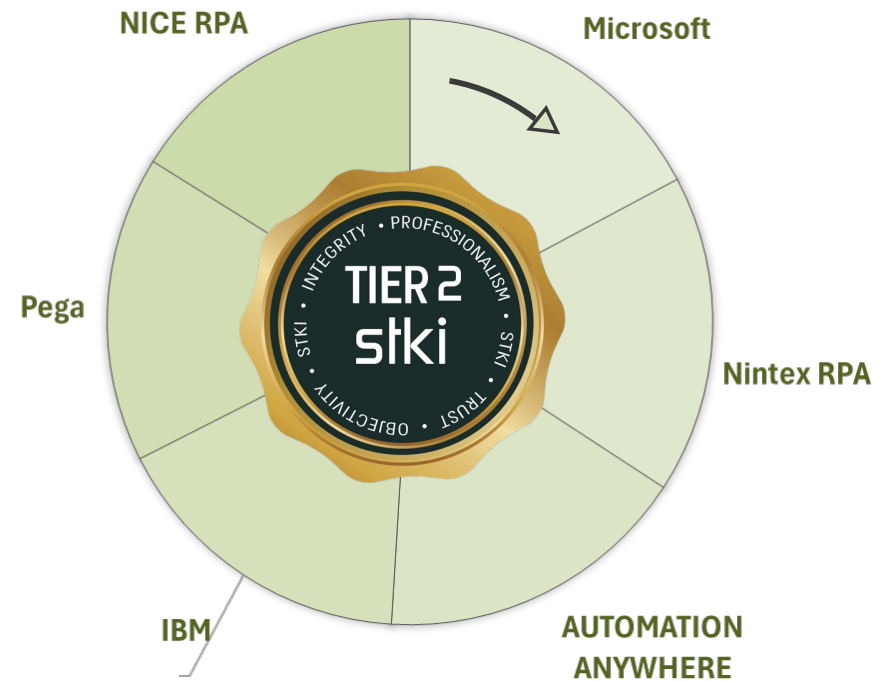
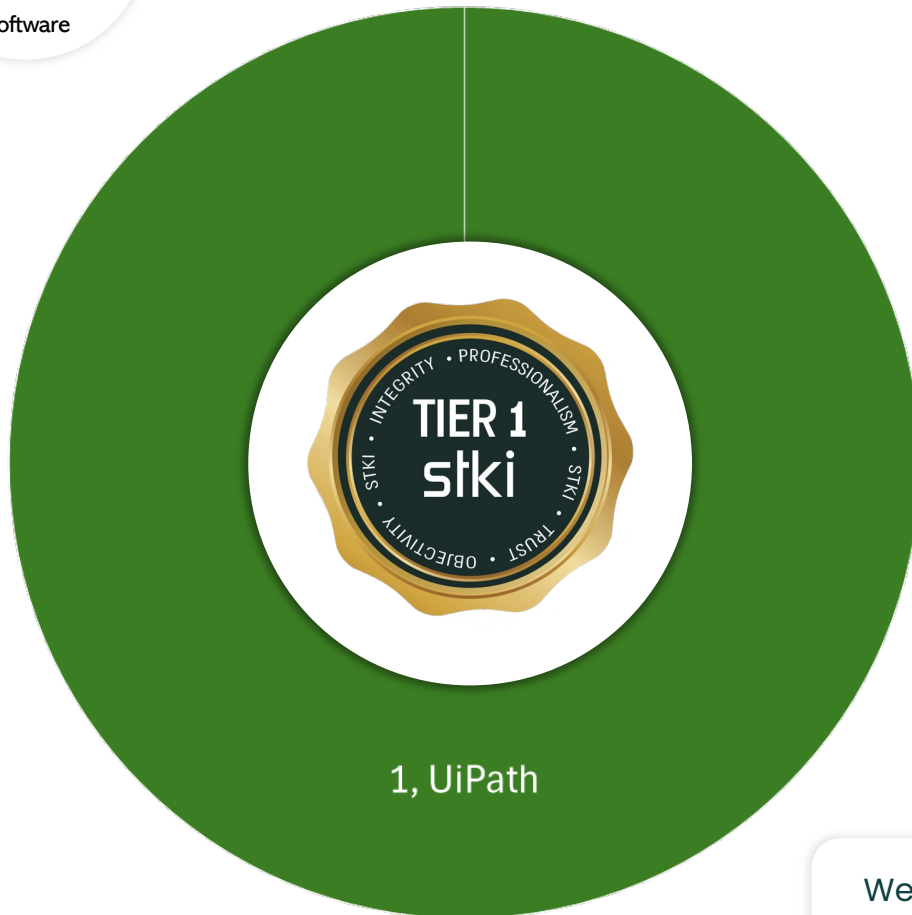


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RPA Platforms



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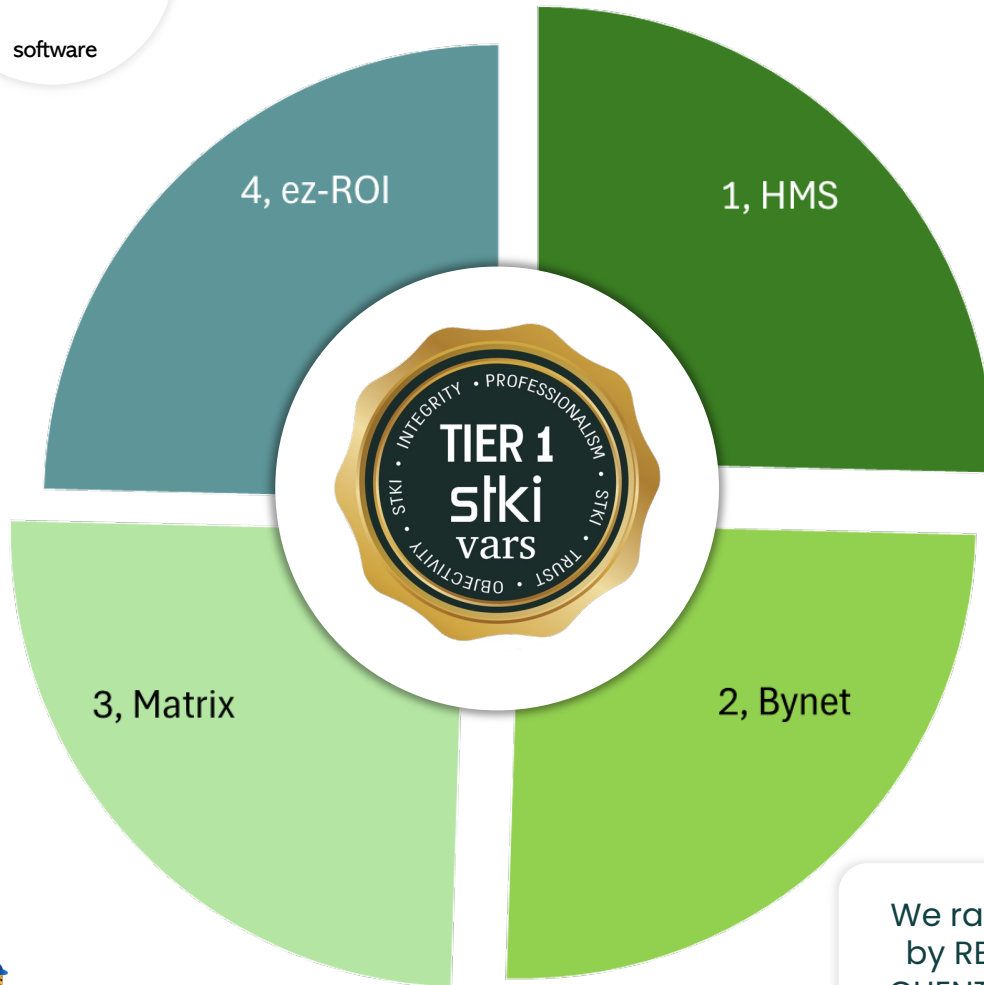


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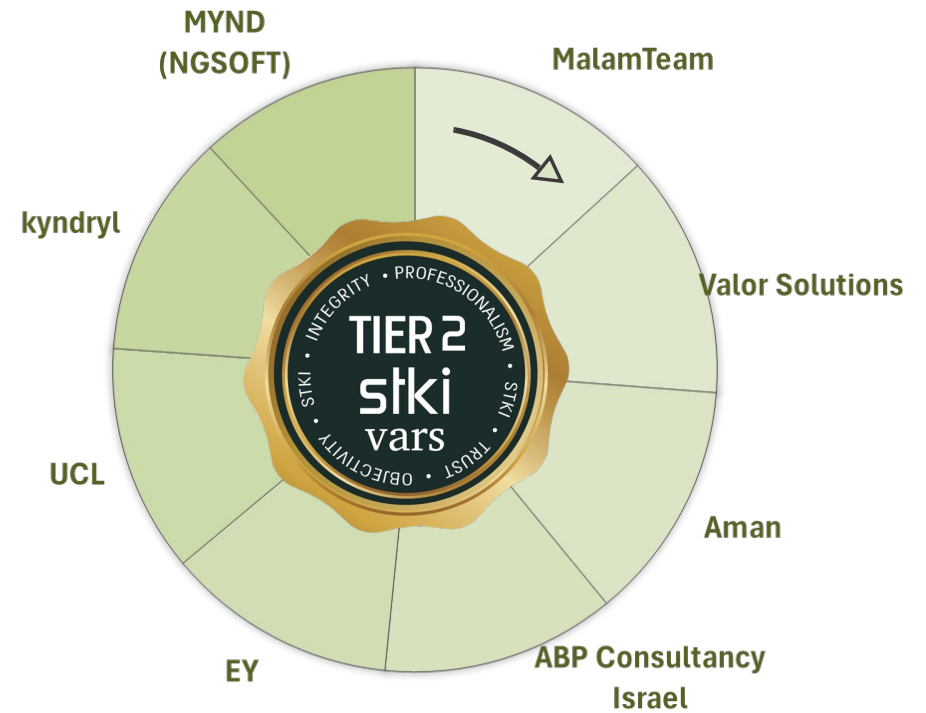


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RPA Platforms VARs



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Industry Specific and Special Purpose Applications Market 2020-2027

	2020		2021		2022		2023		2024		2025		2026		2027
	Market Size	% change	Market Size	% change	Market Size	% change	Cost	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size
Logistics Software	40	12.50%	45	6.67%	48	4.17%	50	8.00%	54	7.41%	58	10.34%	64	9.38%	70
Financial Software	51	1.96%	52	5.77%	55	18.18%	65	7.69%	70	21.43%	85	17.65%	100	12.00%	112
Military Software							20	150.00%	50	50.00%	75	33.33%	100	20.00%	120
Retail Management Software	26	15.38%	30	16.67%	35	14.29%	40	50.00%	60	16.67%	70	11.43%	78	5.13%	82
Healthcare Related Software	37	8.11%	40	12.50%	45	22.22%	55	18.18%	65	15.38%	75	18.67%	89	6.74%	95
Education Digital Software	20	25.00%	25	20.00%	30	16.67%	35	28.57%	45	20.00%	54	20.37%	65	20.00%	78
TOTALS	174	10.34%	192	10.94%	213	24.41%	265	29.81%	344	21.22%	417	18.94%	496	12.30%	557



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Values in Million USD



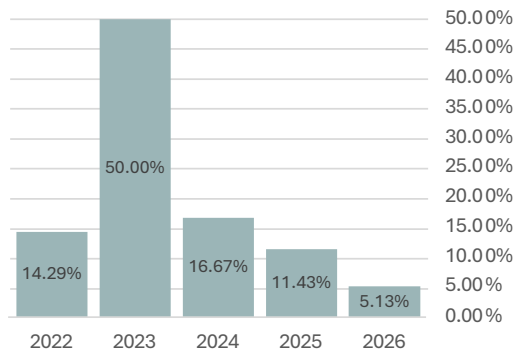
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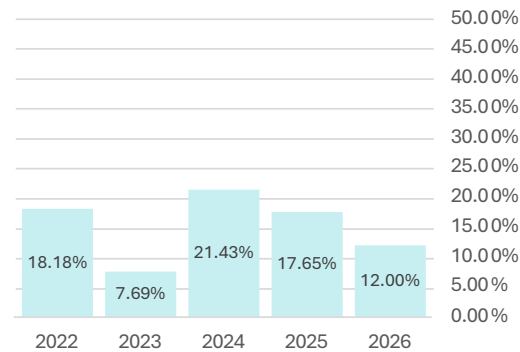
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Industry Specific and Special Purpose Applications Market 2022-2026

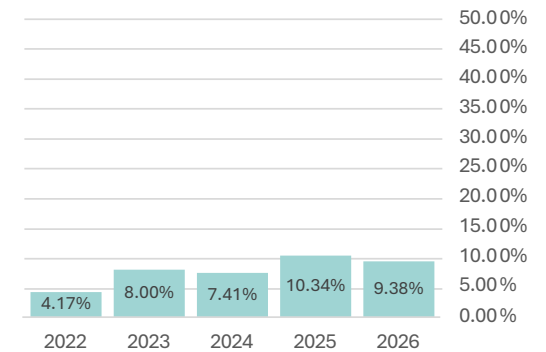
Retail Management Software



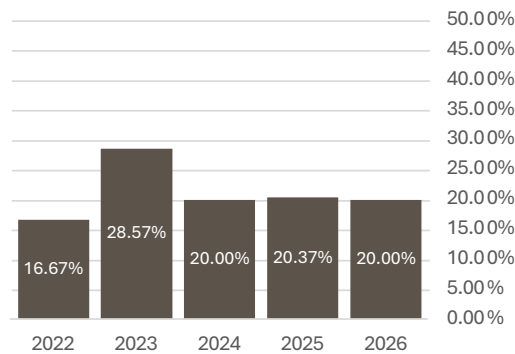
Financial Software



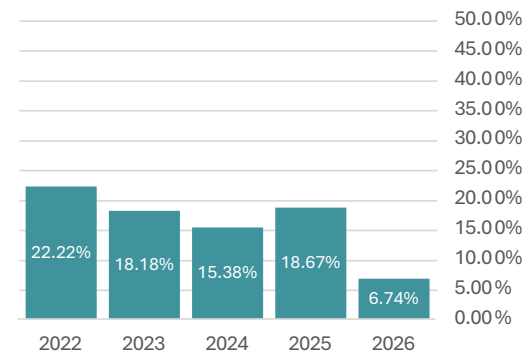
Logistics Software



Education Digital Software



Healthcare Related Software



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GenAI
Analyst



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