

Israel IT Market Study 2026 V2.A

Part 1 : Israel: economy, trends and surveys



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst

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STKI Research Team: 360-Degree Market Coverage



Dr. Jimmy Schwarzkopf (Founder)

Business & Strategy: CIO Management, Verticals, Innovation



Galit Fein (CRO)

IT strategy: Org operating models, OCIO, Agentic AI, WF redesign



Einat Shimoni

Data & Engagement: AI, Machine Learning, CRM, Data Strategy



Pini Cohen

Infrastructure & Cloud: Cloud Native, DevOps, Cyber, FinOps



Reut Shefer Bar

Enterprise Apps: ERP, SCM, eCommerce, HR/EX



GenAI Analyst

The Accelerator: Augmented market processing

Total coverage from hardware infrastructure to user experience.

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Methodology and how to understand the results

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Economy, Business activity and Number of Companies

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Israeli Trends 2025-2026

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surveys

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Number of companies & IT budgets by Industry

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Infrastructure

Infrastructure Products “Markets and Rankings”

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software

Software Products “Markets and Rankings”

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value added services

Value Added Services “Markets and Rankings”

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Methodology and how to “understand” the results



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst



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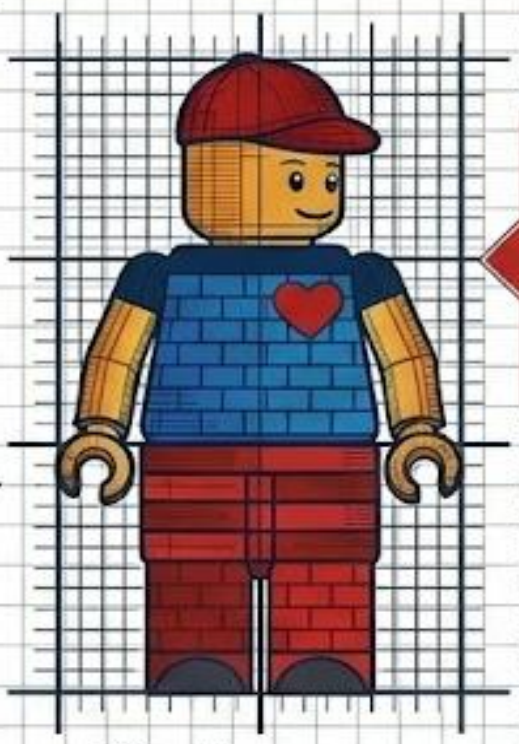
34 Years of Market Intelligence

1992
Founded

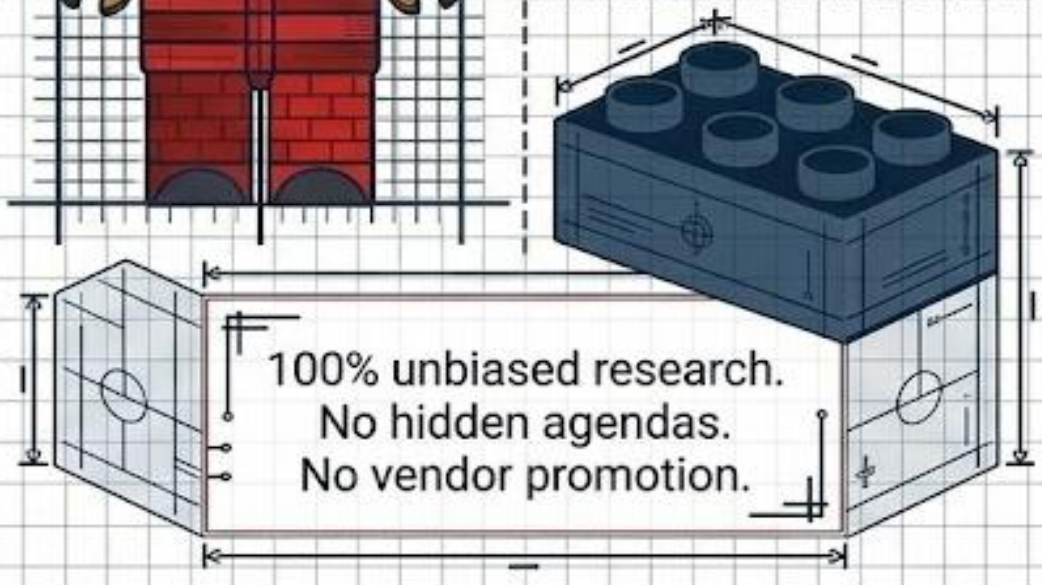
Thousands of annual face-to-face interviews with key industry participants.

2026

Structural Neutrality



Unlike traditional advisory firms, STKI conducts ZERO consulting work.



100% unbiased research.
No hidden agendas.
No vendor promotion.

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

Over **34 years of experience** in the IT analyst sector and thousands of annual face-to-face interviews with key industry participants have enabled STKI analysts to establish solid, long-standing relationships with customers.

STKI **customers include major IT organizations** (government, defense, financial institutions, telecoms, manufacturing, medical, education, etc.) and **IT suppliers/vendors** (infrastructure and software suppliers, consulting and professional services firms).

STKI works closely with vendor's senior management (strategy, business development, and marketing). Where **end users are concerned, analysts meet with CEOs, CFOs, CMOs, CDOs and CIOs** (as with all levels of IT decision making) thereby attaining complete **information of their technology as well as their business needs in order to service the account with value .**

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

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STKI services include

- Virtual meetings
- Face-to-Face meetings
- STKI Analyst House Calls (for both users and vendors)
- CIO STKI "Help Desk"
- Inquiries
- Surveys
- Strategic Marketing & Positioning
- Round Tables for users
- **STKI Annual Summit (Israeli Market)**
- Weekly Webinars
- Vendor Innovation 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

stki.info
IT Knowledge Integrators

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

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What did STKI Analysts do in 2025

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



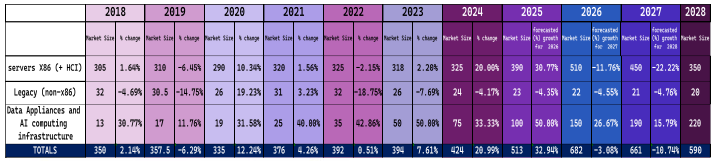
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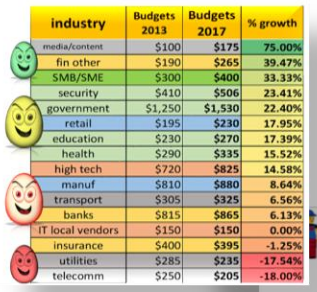




1. IT Trends
2. Surveys about organizational issues
3. Round Table Summaries
4. Industry IT Budgets
5. IT Market Forecasts by category
6. Vendor Tiers by category
7. Product Positioning
8. Staffing Ratios

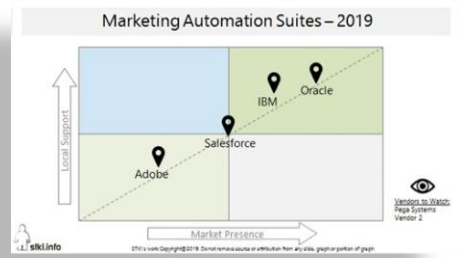


	2018		2019		2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	Forecasted (%) growth for 2025	Market Size	Forecasted (%) growth for 2026	Market Size	Forecasted (%) growth for 2027	Market Size
servers X86 (+ HCI)	305	1.64%	310	-6.45%	290	10.34%	320	1.56%	325	-2.15%	318	2.20%	325	20.00%	390	30.77%	510	-11.76%	450	-22.22%	350
Legacy (non-X86)	32	-4.69%	30.5	-14.75%	26	19.23%	31	3.23%	32	-18.75%	26	-7.69%	24	-4.17%	23	-4.35%	22	-4.55%	21	-4.76%	20
Data Appliances and AI computing infrastructure	13	30.77%	17	11.76%	19	31.58%	25	40.00%	35	42.86%	50	50.00%	75	33.33%	100	50.00%	150	26.67%	190	15.79%	220
TOTALS	350	2.14%	357.5	-6.29%	335	12.24%	376	4.26%	392	0.51%	394	7.61%	424	20.99%	513	32.94%	682	-3.08%	661	-10.74%	590



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





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

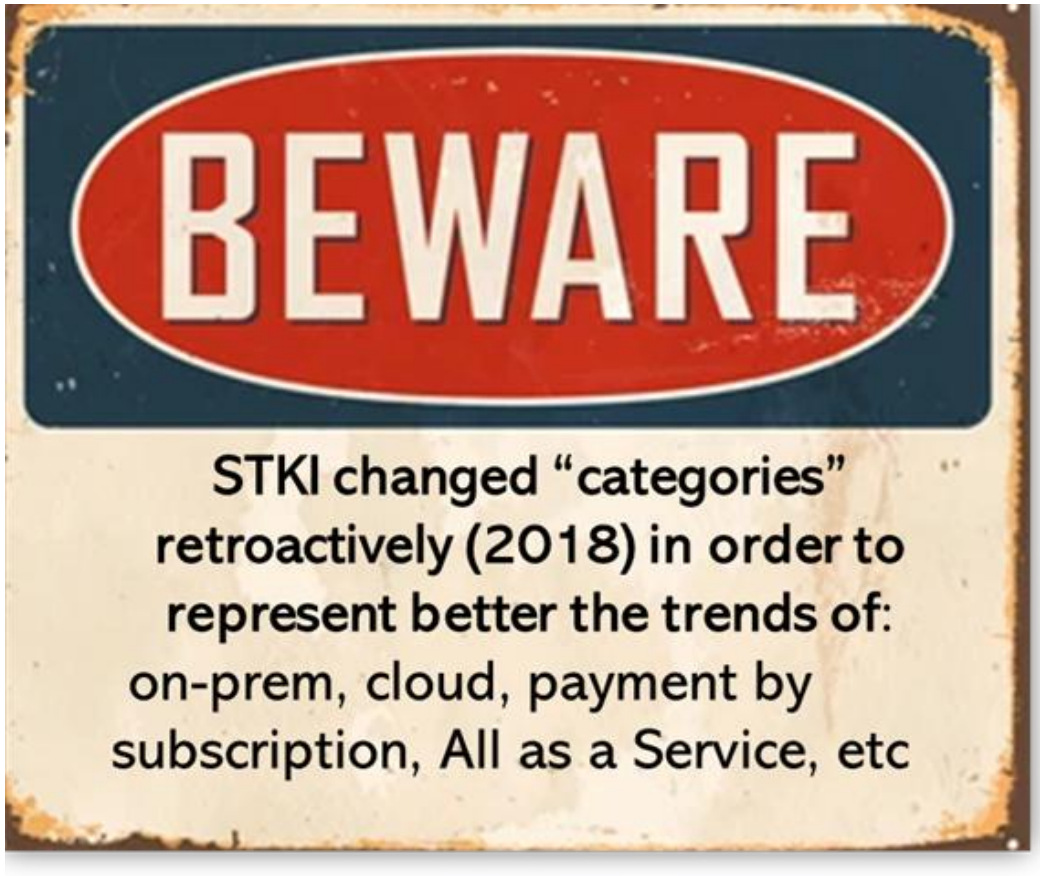


STKI Research Results:

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Equilibrium Engine: Methodology for Objective Truth



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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

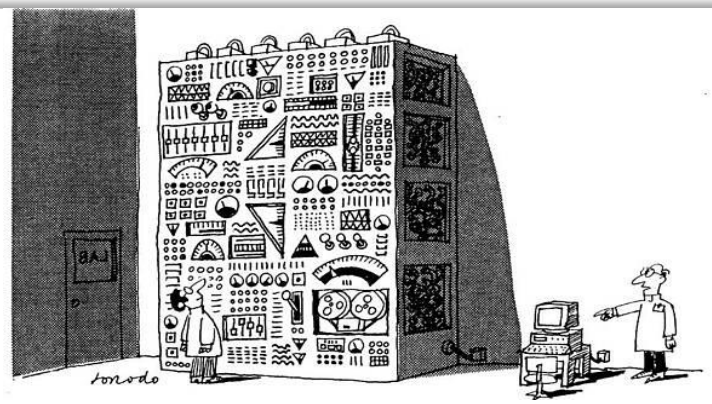
how much did they sell?
to whom?
for how much?
competitors?



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

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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2025 Data Supply Chain Telemetry & Ecosystem Flow

Demand Side Reach

250 CIOs across 16 Industries

In-depth face-to-face/video budget analysis

Supply Side Reach

456 Vendors across 150 Categories covering 1000+ Products

Mandatory detailed briefings

1 Advisory

CIO Help Desk, House Calls

2 Community

Weekly Webinars, Round Tables, Annual Summit

3 Custom Research

Participation in the study requires deep analytical briefings.
Vendors CANNOT buy their way into the data.



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The 2024-2025 Vendor Telemetry Sweep





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Rankings are based… : *important please read*

Rankings are influenced by new projects, new names and market penetration growth

We rank VENDORS by REVENUE and CLIENT MINDSHARE

Our study looks at any **VENDOR VALUE** (products/services) sold to enterprise's IT (including government & security) in Israel; taking into account **the client's mindshare of the value delivered**

- **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 is 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 client's IT department.
- We **do not include** any work/ products for **OEMs and military non-IT projects**.



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



ONLY THE VALUE ADDED COUNTS

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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Hardware Manufacturer
Software House



Local Company
Representative



Distributors



Value Added
Resellers



Integrators Value Added
Services



Integrators Value Added
Services

Users of Technology



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).**

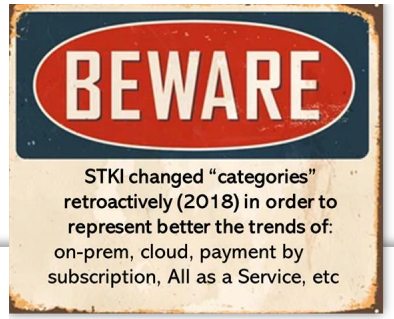


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USER of IT

VENDOR of IT



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

CATEGORIES

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



IT Trends
2025-2028

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important please read

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

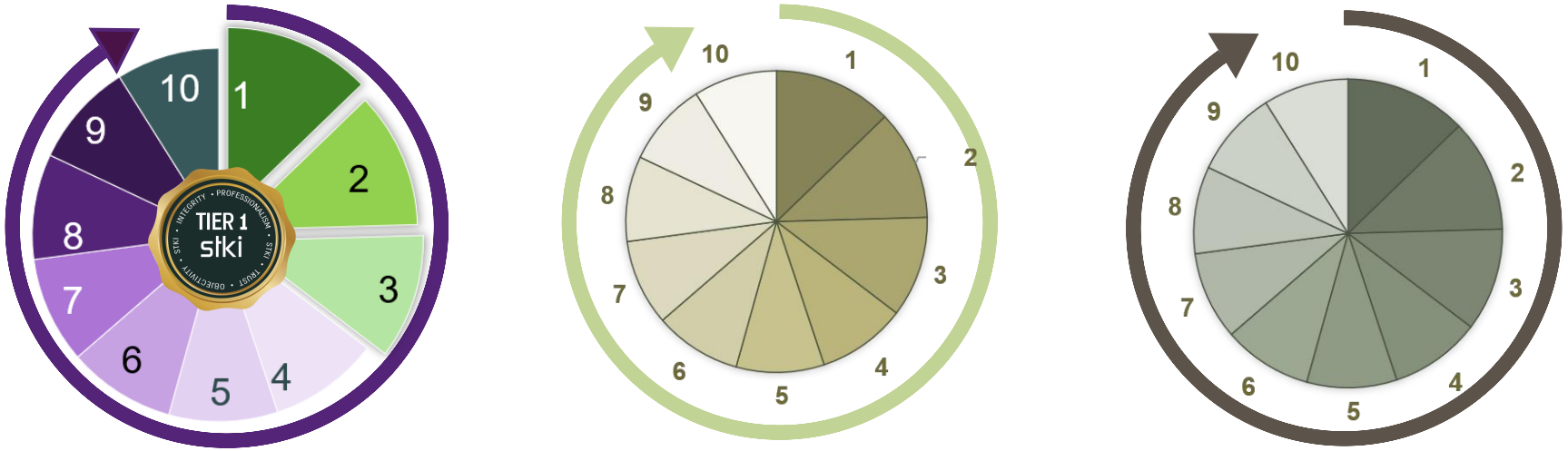


STKI has **signed NDAs** with the vendors (Revenues, Projects) and we tried to **minimize opportunities for reverse engineering of sales/ finance data**



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**

new projects, new names and market penetration growth are also considered



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“Israeli Positioning” for products

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

This positioning is intendent 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:** positioned according to international analyst’s firms analysis



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Israel

Economy, Business activity



Dr. Jimmy Schwarzkopf



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Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst

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Is the Israeli Economy Recovering?

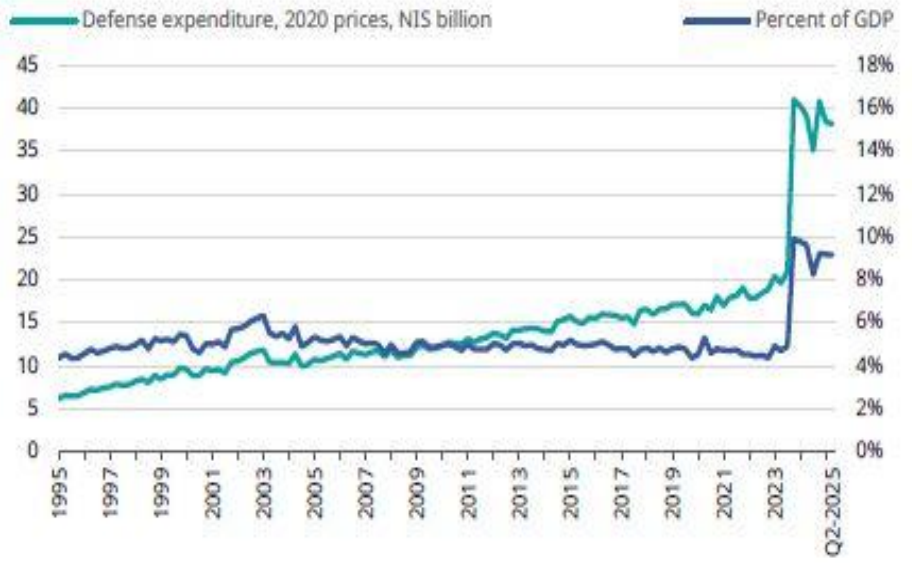
Israel's economy is at a highly sensitive point.

The high costs of the war have increased the government budget deficit, the level of debt relative to GDP, and the burden of interest payments, and the prolonged war has impaired productivity, investment, private consumption, and economic growth.

The easing of the security situation and the prospect of new political agreements create an opportunity for correction and for returning the economy to a path of rapid growth.

Until now, the government has kept civilian spending in line with population growth. However, in view of the expected rise in defense spending, only accelerated economic growth will allow this trend to continue and prevent severe harm to civilian services.

Defense Expenditures and it's % of GDP



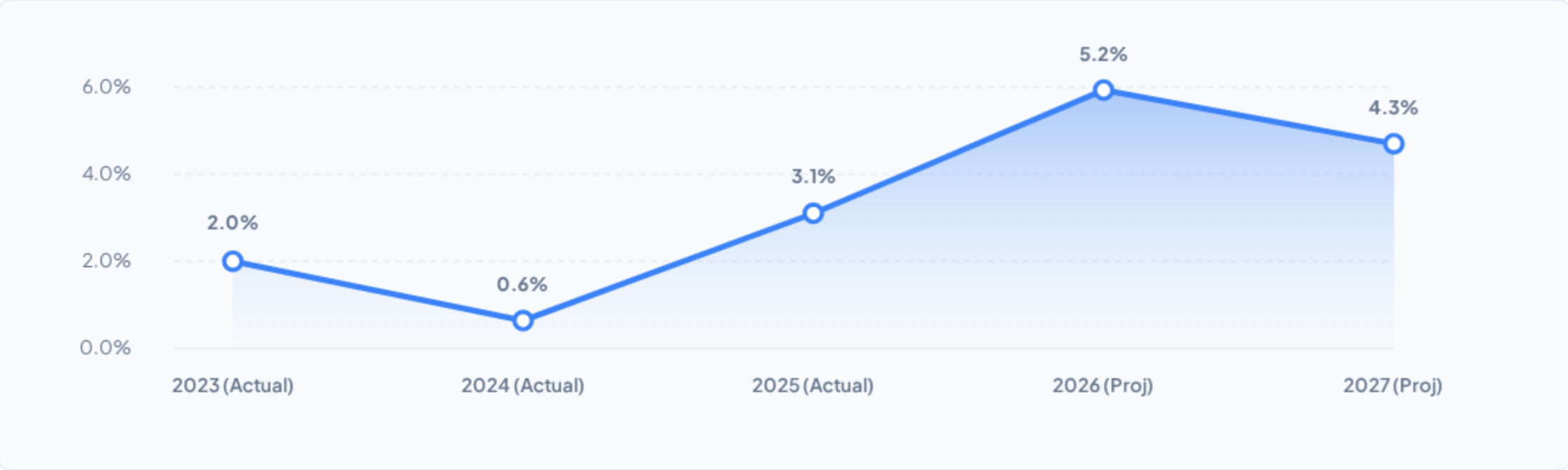
Source: Benjamin Bental and Labib Shami, Taub Center | Data: CBS

https://www.taubcenter.org.il/en/research/snr-2025-macro/

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GDP Growth Trend (2023-2027)



Note: Year 2024 reflects the peak direct economic hit from war operations. The sharp rebound in 2025 (3.1%) and projected 2026 (5.2%) is anchored by strong post-ceasefire private consumption and military industry expansion.

SOURCES: CBS FIRST ASSESSMENT (FEB 2026) & BANK OF ISRAEL RESEARCH FORECAST (JAN 2026)

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Fiscal indicators & Projections

Fiscal Year	State Budget Deficit (% of GDP)	Debt-to-GDP Ratio (%)	Context / Primary Driver
2023	4.2%	62.0%	Outbreak of war in Q4 drove sudden spending spikes
2024	7.7%	67.5%	Peak war expenditures and mobilization costs
2025	4.5%	68.5%	Strong tax revenues mitigated the initial deficit ceiling
2026 (Proj)	3.2%	68.5%	Gradual easing of domestic defense expenditures
2027 (Proj)	2.5%	67.0%	Forecast stabilization and returning to declining path

DATES: 2023 – 2027

SOURCES: BANK OF ISRAEL MONETARY POLICY REPORTS (2024–2026) & MINISTRY OF FINANCE

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Strategic Growth Priorities

Fiscal Consolidation

Steering the debt-to-GDP ratio back to a declining path beginning in 2026. Passing structural adjustments will maintain global financial market confidence and protect Israel's sovereign credit rating.

Productivity Reforms

Narrowing the 30% value-added gap relative to reference OECD nations by enhancing public capital stock, expanding tech training, and increasing capital per worker in traditional services.

Cost of Living Reductions

Dismantling domestic trade barriers, standardizing EU import regulations, and cutting red tape to durably align Israel's standard price levels with the OECD average.

DATES: 2026 – 2028 HORIZON

SOURCES: OECD ECONOMIC SURVEY OF ISRAEL (FEBRUARY 2025) & BANK OF ISRAEL RECOMMENDATIONS

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Real-Time Economic Indices

The Melnik Index

Developed by Prof. Rafi Melnik, it diagnoses business cycle turning points using CBS data. The index highlighted private sector stagnation in late 2023, followed by a stabilizing trend in 2025.

BoI Composite Index

Calculated by the Bank of Israel using 12 variables (e.g., manufacturing, imports, job vacancies). Historically tracked the short-term direction of business output before classic format discontinuation in mid-2025.

CBS Business Tendency

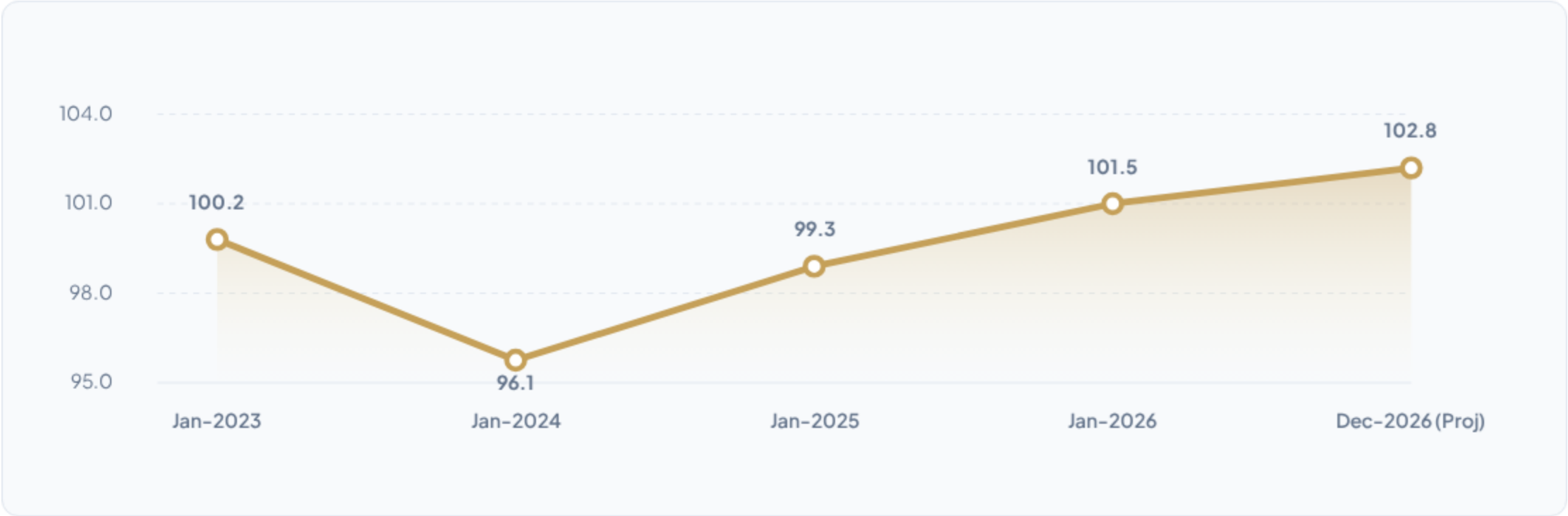
A monthly survey capturing direct assessments from senior managers regarding supply and demand constraints. It provides real-time estimation of the domestic output gap.

DATES: 2023 – 2025

SOURCES: REICHMAN UNIVERSITY (MELNIK INDEX) & BANK OF ISRAEL RESEARCH DEPARTMENT

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The Melnik Business Cycle Tracker



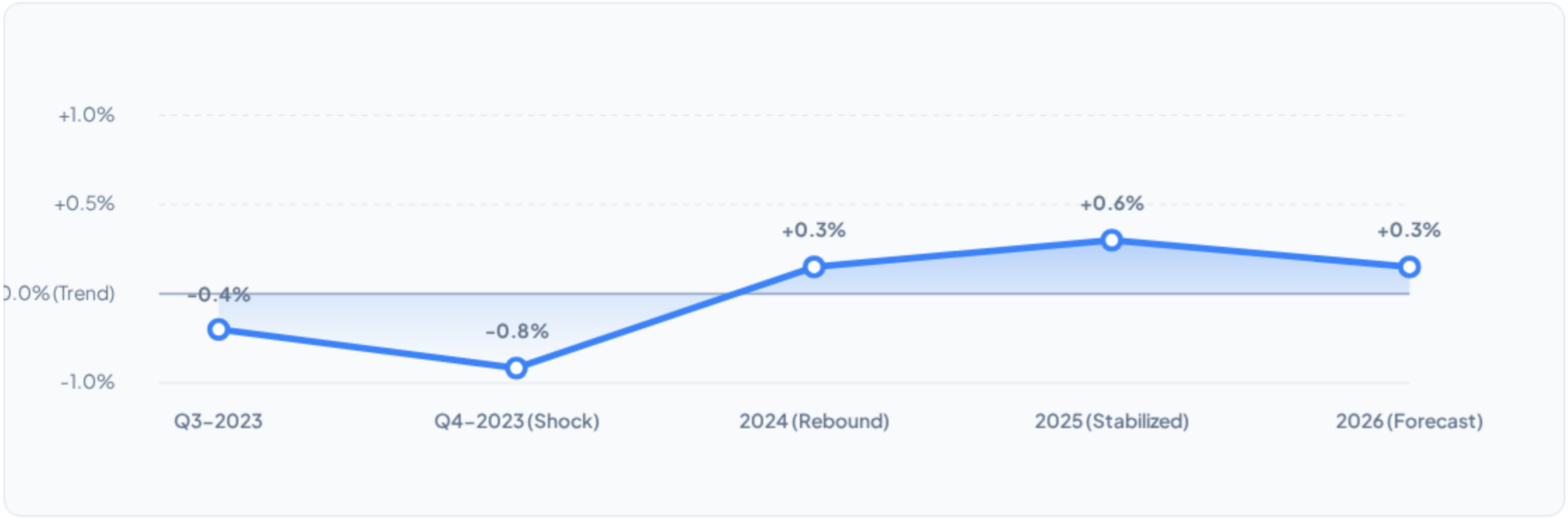
The Melnik Index focuses primarily on business sector inputs, utilizing corporate performance rather than government sectors. The index accurately mapped the 2023 slowdown and subsequent 2024 transition phase, signaling private sector expansion entering 2026 (+2.8%).

SCOPE: 2023 – 2026 (COMPARATIVE TRAJECTORY)

SOURCE: PROF. RAFI MELNIK BUSINESS CYCLE MONTHLY REPORTS / REICHMAN UNIVERSITY

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BoI Composite State-of-the-Economy Index



Note: The Bank of Israel Index combines 12 high-frequency inputs including credit card purchases, services revenue, and trade. The deep contraction in Q4-2023 (-0.8%) stabilized in 2025, buoyed by the late-2024 northern ceasefire, returning to a long-term potential growth trajectory in 2026.

DATES: 2023 – 2026 (QUARTERLY AVERAGES)

SOURCE: BANK OF ISRAEL RESEARCH DEPARTMENT (PUBLISHED JUNE 2026)

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BoI Composite State Index



The Bank of Israel's State of the Economy Index shows short-term contraction during localized escalations in early 2026, followed by a strong rebound toward the long-term trend of 0.3% monthly growth.

Source: Bank of Israel (BoI) Research Department (May 2026)

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Survey Sentiment & Economic Optimism

CBS Business Tendency Survey

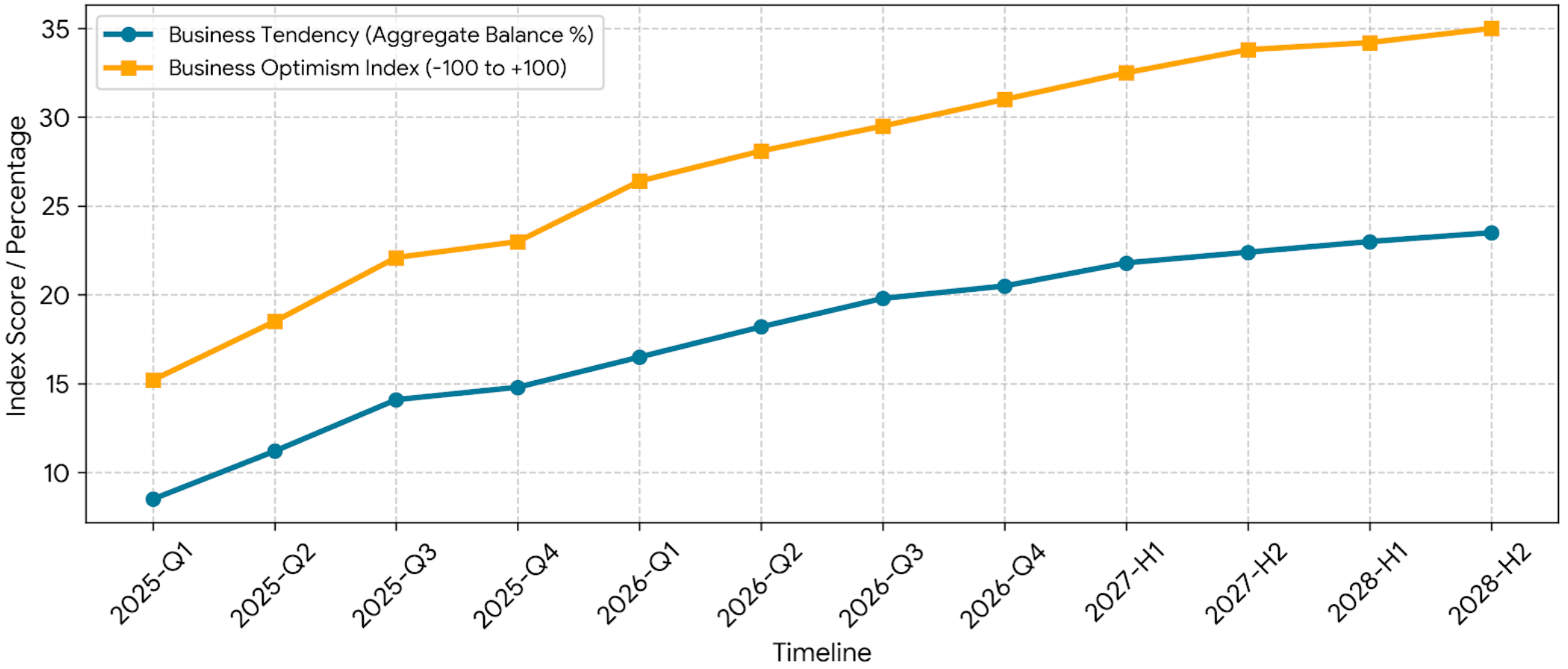
The Business Confidence Index surged to a solid positive **15.35 points**. This indicates expanding executive optimism across retail trade, hardware manufacturing, and professional services.

Economic Optimism Index

Stabilizing near **97.10 points**, the index highlights robust domestic consumption recovery. Sentiment remained highly resilient despite fiscal concerns over emergency expenditure cycles.

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CBS Business Confidence & Optimism Indices



CBS Business Tendency Survey

Designed to collect qualitative, forward-looking opinions from over 350 executives. Evaluates current demand limitations, capacity usage, and immediate forecast bounds.

CBS Business Optimism Survey

Tracks standard business behavior, macro economic expectations, and commercial willingness to launch capital intensive projects.

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Manufacturing PMI Resilience

52.4

Manufacturing Expansion Threshold (>50)

Israel Purchasing Managers Index

The headline Manufacturing PMI index printed a steady **52.4 points**, signifying continuous expansion. The index indicates healthy recovery across key sub-metrics: new industrial orders, physical output volumes, and proactive inventory restock cycles.

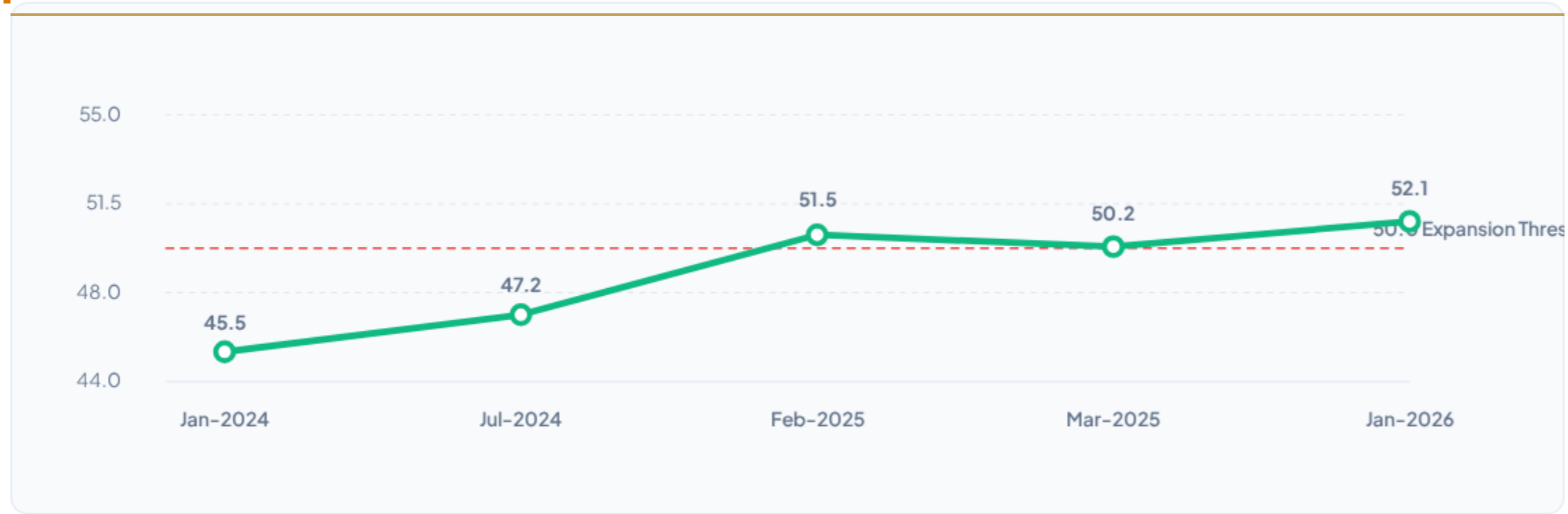
June 2026 update

Sources: Bank Hapoalim, ISM Global Manufacturing PMI Association



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Israel Purchasing Managers Index (PMI)



The Israel Manufacturing PMI oscillates around the 50.0 expansion boundary. Following persistent war constraints throughout 2024 (bottoming at 45.5), operating conditions successfully crossed into expansion territory in early 2025 (51.5 in Feb, 50.2 in Mar) and maintained solid footing through 2026.

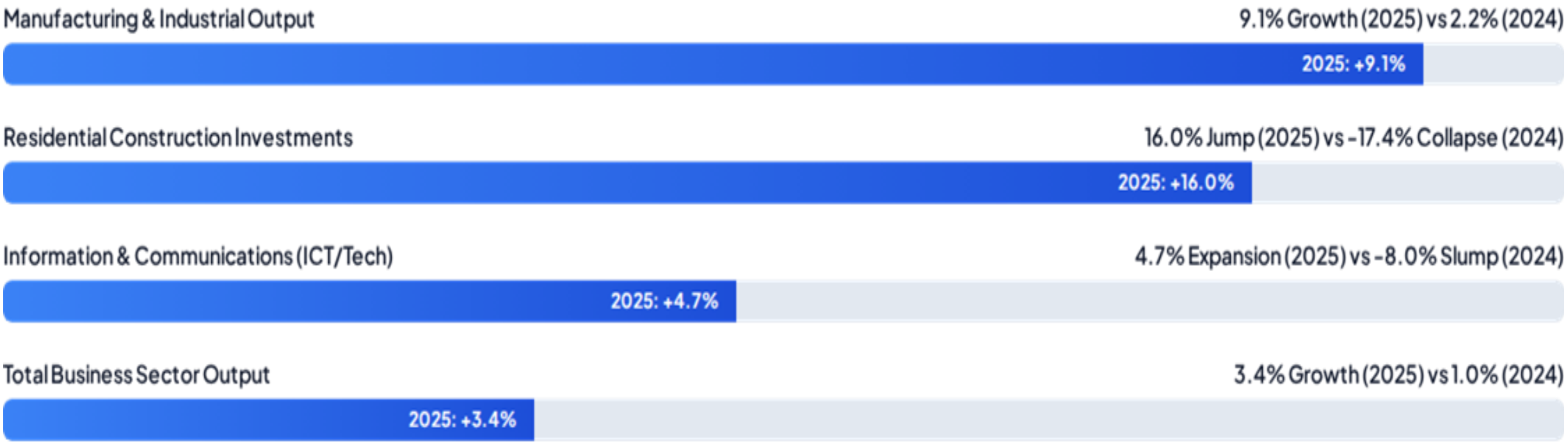
TIMELINE: 2024 – 2026 (MONTHLY BENCHMARKING)

SOURCE: BANK HAPOALIM / IPLMA MANUFACTURING SURVEYS

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Sectoral Business Sentiment

Comparing Year-on-Year Growth across key sectors, showcasing recovery in 2025 relative to the 2024 war-induced shock:



DATES: 2024 VS 2025 (ANNUAL COMPARISON)

SOURCES: CBS BUSINESS TENDENCY SURVEY & GDP FIRST ESTIMATE (FEBRUARY 2026)

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The Dual Economy Productivity Gap

Advanced Tech Sector

The high-tech and ICT sectors act as the primary engine, boasting productivity rates **2.2 times higher** than traditional domestic industries. Over the last decade, high-tech work-hour productivity increased by over **45%**.

Traditional Lagging Sectors

Domestic services and manufacturing suffer from a substantial digital gap, creating a dual economy. Overall labor productivity (GDP per hour worked) lags top OECD peer nations by nearly **40%**.

Sources: OECD Productivity Surveys, Taub Center Research, McKinsey Report

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High-Tech: The Economic Anchor

Workforce & Exports: Employing roughly 10% of the labor force, the high-tech sector accounts for over 60% of total Israeli exports.

GDP & Growth Contribution: High-tech accounts for approximately 20% of domestic GDP and has driven 40% of all GDP growth since 2018.

Exceptional Resiliency: High-tech service exports successfully expanded from $15 Billion in 2013 to $55 Billion in 2024, providing crucial foreign exchange and tax revenues.



DATES: 2013 – 2025

SOURCES: ISRAEL INNOVATION AUTHORITY & TAUB CENTER STATE OF THE NATION REPORT 2025

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Global Tech Benchmarking

Macroeconomic Indicator (ICT Impact)	Israel	United States	EU-27 Average	OECD Average
High-Tech Contribution to GDP	**20.0%**	10.0%	6.0%	8.0%
Tech Share of National Employment	**10.0%**	5.0%	4.0%	4.5%
High-Tech Share of Total Exports	**52.0%**	22.0%	12.0%	15.0%
National Expenditure on R&D (% GDP)	**5.6%**	3.5%	2.2%	2.7%

June 2026 update

Sources: OECD Main Science and Technology Indicators, Israel Innovation Authority Report



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V2.A

Labor Market Tightness

Resilient But Constrained Labor Supply

Despite a prolonged war, the Israeli labor market remained historically tight during 2024–2025 due to unprecedented structural shocks:

3.0%

UNEMPLOYMENT RATE

Reserve Mobilization: Extensive call-ups restricted the civilian labor supply, driving temporary absences and raising private sector labor costs.

Non-Israeli Shortage: The complete ban on Palestinian workers left severe shortages, primarily in construction and agriculture.

Elevated Vacancies: The private sector job vacancy rate remained high at 4.5% in late 2025, keeping pressure on wage indexation.

DATES: 2024 - 2025

SOURCES: CBS LABOUR FORCE SURVEY & BOI ANNUAL ECONOMIC REPORTS

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Information and Communications Technologies (ICT)
international comparisons value added and jobs (%)

	ערך מוסף גולמי של סך ICT ומרכיביו מתוך התמ"ג, במחירים שוטפים Gross value added of ICT sector and sub-sectors out of total GDP, at current prices			משרות בענפי ICT ומרכיביו מסך המשרות במשק Jobs in the ICT sector and sub-sectors out of total jobs			
	תעשיית טכנולוגיות מידע ותקשורת ICT - manufacturing	שירותי טכנולוגיות מידע ותקשורת ICT - services	טכנולוגיות מידע ותקשורת - סך הכל ICT - total	תעשיית טכנולוגיות מידע ותקשורת ICT - manufacturing	שירותי טכנולוגיות מידע ותקשורת ICT - services	טכנולוגיות מידע ותקשורת - סך הכל ICT - total	
Israel	2.09	7.42	9.51	0.88	5.36	6.24	ישראל
European Union - 27 countries	0.80	4.69	5.49	0.25	2.94	3.19	האיחוד האירופי - 27 מדינות

הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

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The Labor Productivity Gap

Value Added Per Worker

Historically, Israel's productivity has lagged behind key Western European peers. However, the gap compared to population-equivalent peers (e.g., Denmark, Finland, Austria) has begun narrowing.

The overall value added per worker gap narrowed from 20% in 2015 to 12% in 2023, led by services sector integration.

Value Added Per Hour Worked

While the output-per-worker gap has shrunk, the output-per-hour gap remains wide at 30% due to longer weekly working hours in Israel compared to European averages.

Standardizing capital per worker to reference country levels is estimated to completely eliminate the worker productivity gap.

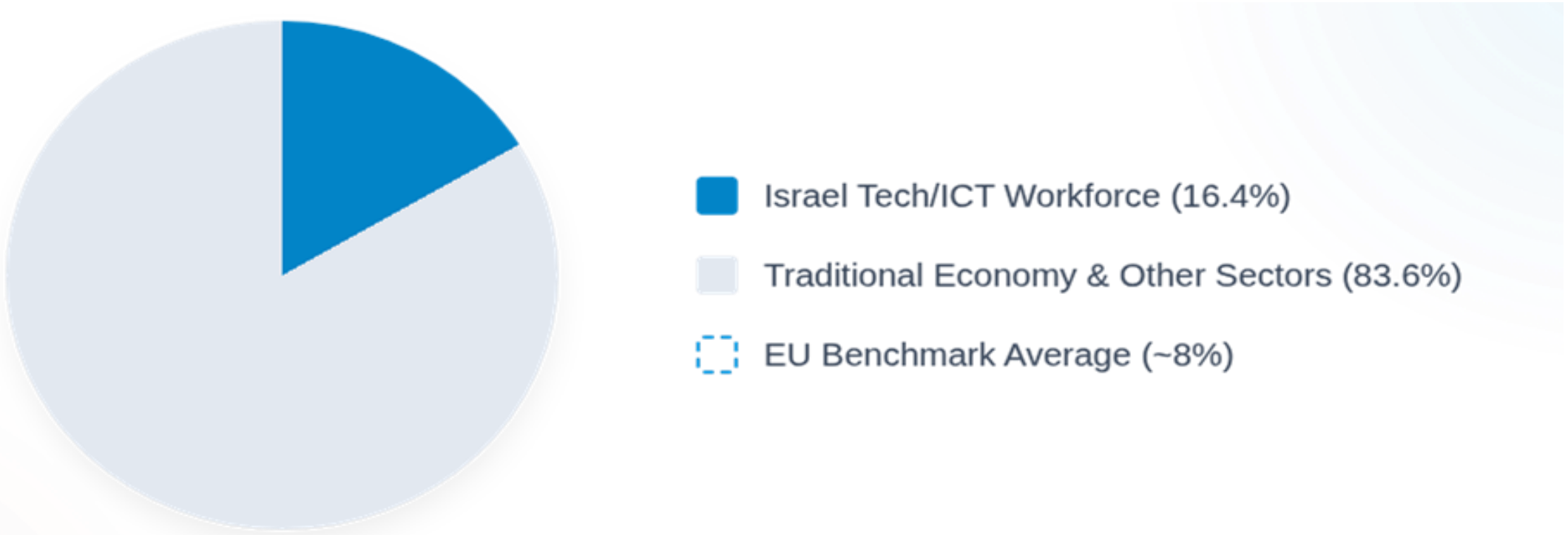
DATES: 2015 – 2023 (LATEST COMPARATIVE FRAMEWORK)

SOURCES: OECD PRODUCTIVITY DATABASE & TAUB CENTER MACROECONOMIC ANALYSIS (DEC 2025)



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ICT Employment Concentration



With 16.4% of its active workforce operating in ICT roles, Israel maintains one of the highest concentrations of tech talent globally; more than double the European Union benchmark average.

Sources: OECD Science & Technology Indicators, Israel Innovation Authority (2024)

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Project Nimbus Cloud

Nimbus Project, is a comprehensive initiative to transition Israeli government services to the cloud. It is a **structured roadmap** for digitizing national public services while maintaining economic and operational control.

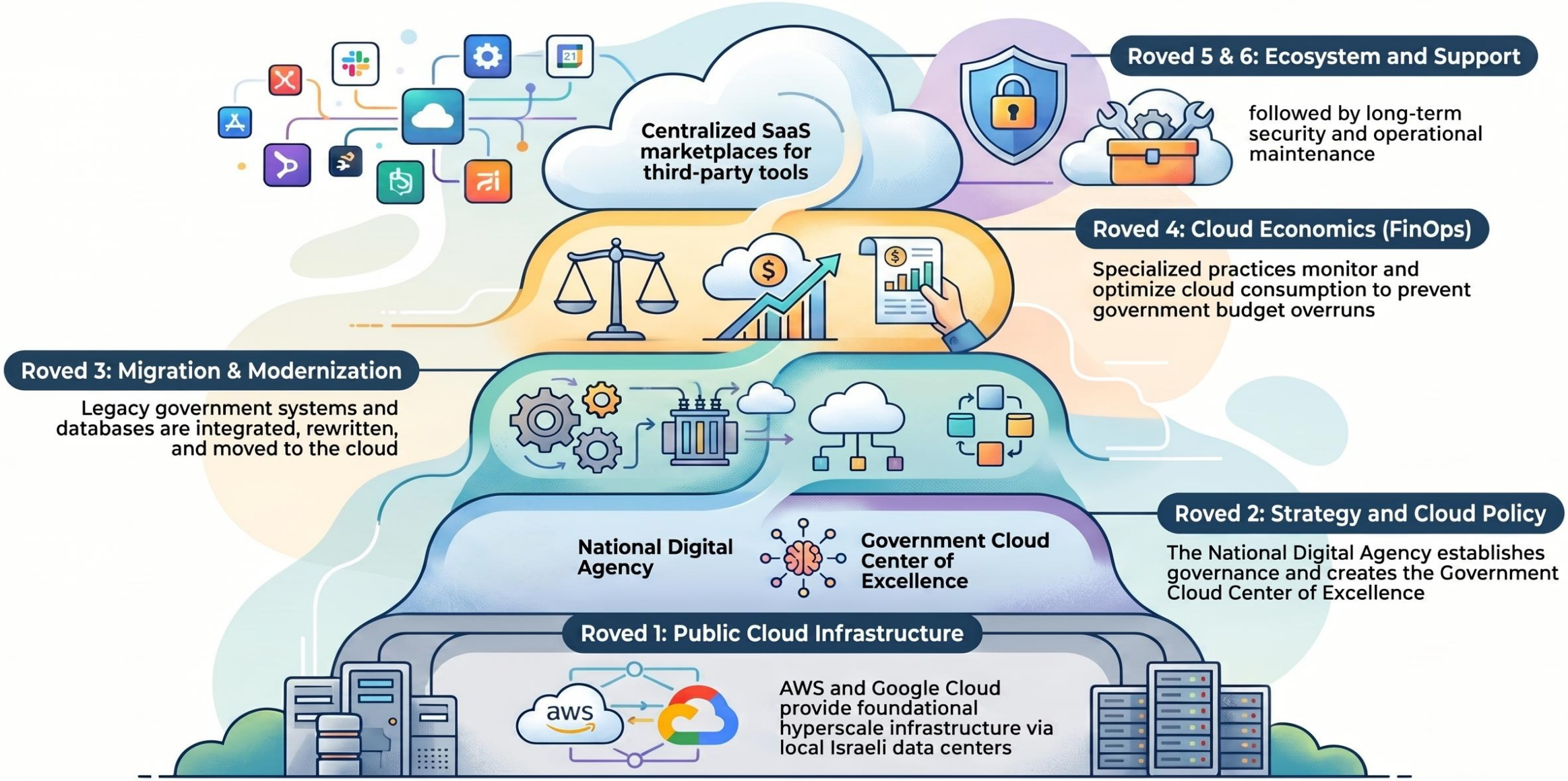
- *This strategic framework begins with the **physical infrastructure** provided by global tech leaders and progresses into the **governance policies** and technical migration of legacy systems.*
- *To ensure fiscal responsibility, the model incorporates a **financial optimization tier** dedicated to monitoring consumption costs across various departments.*
- *Additionally, a **centralized digital marketplace** facilitates the acquisition of approved third-party software for administrative use.*
- *The lifecycle concludes with a long-term focus on **continuous system maintenance**, rigorous security oversight, and ongoing performance improvements.*

Sources: Ministry of Finance, Mordor Intelligence ICT Industry Report (2026)



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Inside the **Nimbus Project:** The 6-Tier Architectural Framework



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The Nimbus Capability Matrix

	Primary Actor	Core Objective	Target Output
Roved 1	AWS & Google	Compute Provisioning	Local Hyperscale Data Centers
Roved 2	National Digital Agency & CCoE	Framework Governance	Unified Cloud Policy
Roved 3	Migration Teams	Asset Relocation	Modernized Code & Integrated Databases
Roved 4	FinOps Leaders	Cost Control	Prevented Budget Overruns
Roved 5	ISVs	Centralized Ecosystem	Pre-approved SaaS & CRM
Roved 6	Cloud Operators	Evolving Operations	Continuous Security Monitoring



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Bank of Israel Launches a Technological *Assessment of the Digital Shekel Design*



The Bank of Israel is inviting potential vendors, technology experts, and academics to participate in a consultation process aimed at exploring potential technologies to achieve the capabilities of the Digital Shekel System.

The Bank will hold a webinar to explain the process to potential respondents

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Israel Digital Landscape

Israel's tech-forward marketplace remains a global digital powerhouse. With massive fixed-broadband capacity, businesses and citizens operate with standard gigabit efficiency, while social platforms continue to form the baseline of civic engagement.

Fiber Optic Future

Expanding fast fiber footprints guarantee heavy consumer consumption of dynamic high-resolution media like video.

Mobile Room for Growth

Cellular data speeds of 44-65 Mbps are robust, but present clear optimization space as carriers roll out advanced 5G.

Critical Ecosystem Play

Virtually every adult (93.3%) interacts with social media. Unified multichannel digital campaigns are a business requirement.



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Ubiquitous Digital Infrastructure

91.3%

Active Internet Penetration Rate (2025/26)

Digital Core Demographics: With over **8.72 million active internet users** and 10.4 million cellular mobile connections (representing 109% of the total population), Israel's network access is fully saturated.

Advanced Connection Speeds: High baseline capacity is supported by robust infrastructure. The median **fixed internet download speed is 257 Mbps**, with mobile cellular download speeds exceeding 60 Mbps.

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User Demographics: Deep Penetration

Connected Users

91.1%

8.61 million active internet users make up the vast majority of Israel's highly modernized population base.

Social Media Reach

72.2%

6.82 million active profiles. When measured against internet users specifically, this jumps to a commanding **79.2%**.

Adult Engagement

93.3%

Nearly universal adoption among adults (18+), emphasizing digital channels as the main space for consumer connection.

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Network Speeds: A Structural Disparity

Fixed Broadband (Home/Office)

217.35 Mbps (Median Download)

Powered by continuous, aggressive fiber-optic expansion across key infrastructure giants Bezeq and HOT.

Mobile cellular (5G/4G Networks)

44.40 - 65.96 Mbps (Median Download)

Strong baseline performance from Tier-1 operators like Pelephone and Partner, though MVNOs moderate the national median.



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Use of Computers (Websites & APPs)
(age 20 and over)

	Regular use of online services HMO	Searching for health information	Games	Paying bills	Shopping	Government services	Down-loading files	Banking services	E-mail	Searching for information	Chat groups and social media	WhatsApp	There is a computer at home
THOUSANDS	4,121.3	3,871.5	2,010.9	3,186.2	3,505.7	3,514.0	3,770.8	4,181.4	4,701.8	4,820.5	4,167.8	4,992.6	5,106.5
%	66.6	62.6	32.5	51.5	56.7	56.8	61.0	67.6	76.0	77.9	67.4	80.7	82.6
SEX													
Men	63.2	59.8	34.1	55.7	55.8	59.4	62.5	71.2	76.5	78.6	66.0	81.3	82.7
Women	69.9	65.2	31.0	47.5	57.5	54.4	59.5	64.2	75.6	77.3	68.7	80.1	82.4
AGE													
20-24	59.9	61.5	47.1	38.9	61.8	52.5	71.6	71.7	85.5	81.3	78.5	84.9	80.8
25-44	74.5	69.4	38.8	63.3	69.2	67.3	69.0	76.9	85.8	84.4	77.5	86.0	85.3
45-64	70.0	64.5	28.2	53.5	56.2	57.8	58.4	68.8	75.4	78.5	65.6	82.7	84.6
65-74	56.7	53.4	19.5	37.9	34.6	44.5	48.3	51.5	57.1	67.7	49.9	72.4	77.9
75+	38.0	36.1	15.0	22.6	19.9	24.0	33.2	33.3	42.9	53.1	32.4	52.3	70.0

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Audience Comparison: Active Users



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Israel

Trends 2025-2029



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



GenAI Analyst

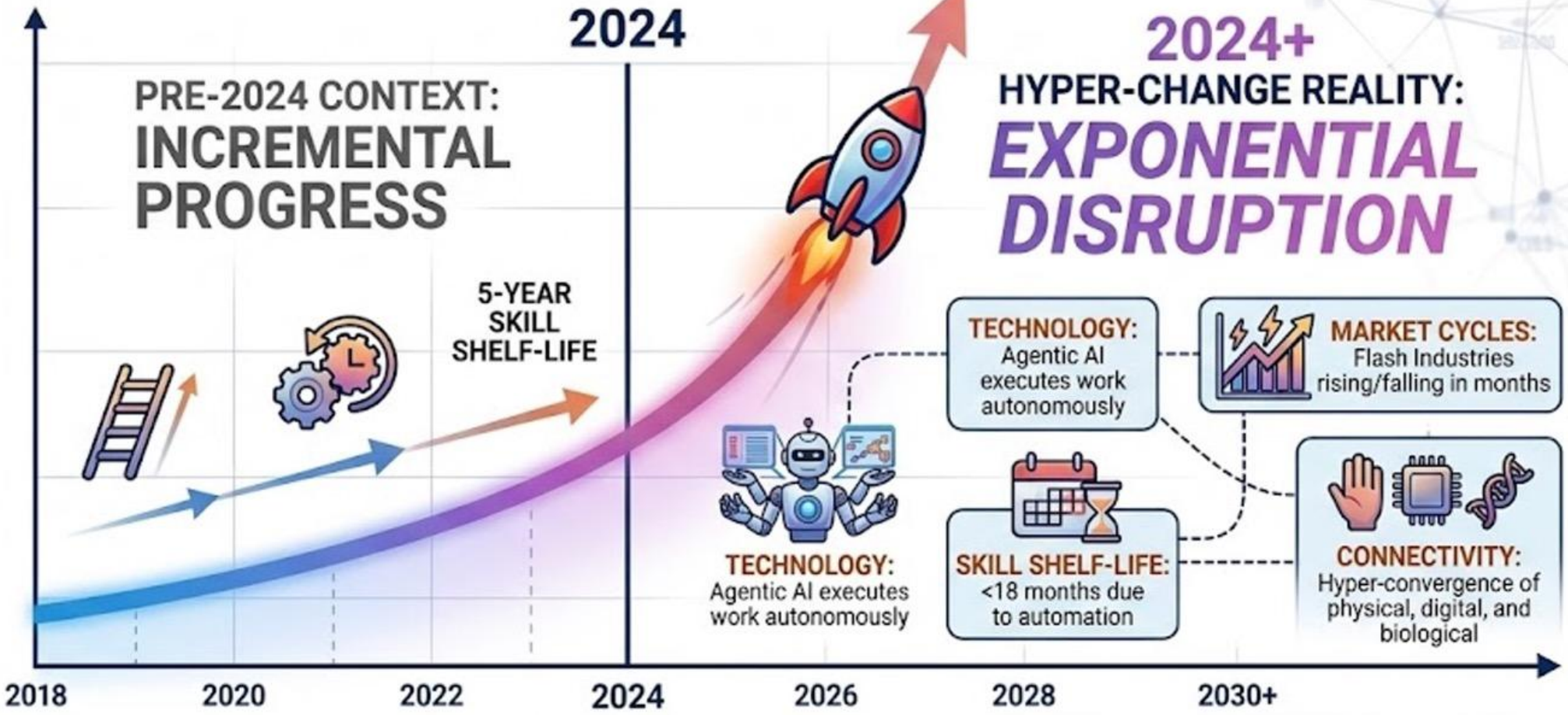
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THE ERA OF HYPER-CHANGE: 2024 AND BEYOND

WHY IS IT "HYPER"?

- COMPOUNDING BREAKTHROUGHS
- THE END OF "STEADY STATE"
- COMPRESSED ADOPTION





> *WE ARE NO LONGER LIVING THROUGH AN ERA OF CHANGE, BUT A CHANGE OF ERAS.*

NAVIGATING THE VELOCITY

UNLEARN & RELEARN → DECENTRALIZED AGILITY → HUMAN-CENTRIC TECH

The CIO Mandate 2026–2028: From Experimentation to Industrialization

The era of pure AI experimentation has ended. For 2026-2028, the mandate shifts to industrialization, financial accountability (FinOps), and a fundamental redesign of IT architectures—moving from static, human-facing applications to "intent-centric" systems designed for autonomous agents.

STRATEGIC & OPERATIONAL IMPERATIVES

Transition to Agentic AI & Scaling ROI



Low impact



Autonomous Multi-Agent Systems (Measurable Financial Impact)

Expanding FinOps for AI Infrastructure

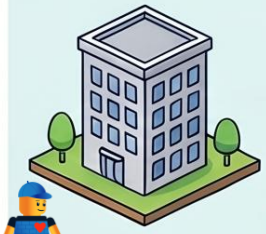


Skyrocketing AI Costs



Optimized Cloud Architectures

Redesigning the IT Operating Model



IT Silo



Personnel and resources embeddis (business units)



Strategic Co-Creators

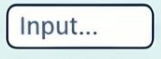
Traditional IT Focus	2026–2028 Mandate
"Everyday AI" productivity pilots	Industrialized Agentic workflows
Static annual/ quarterly cycles	Continuous, trigger-based allocation
System uptime and stability	Continuous, trigger-based allocation
System uptime and stability	Enterprise growth and revenue

THE ARCHITECTURAL REVOLUTION

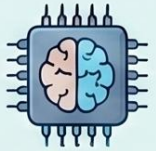
Moving to Intent-Centric Applications



Human UI



Simple Intent Statement



API-Driven "Solvers" Engine

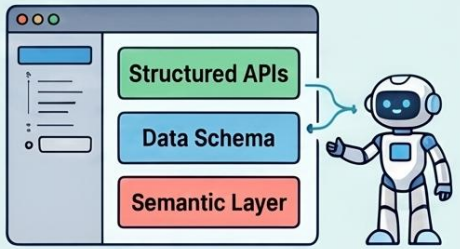


Execute Complex Goals

Optimizing the Machine-Readable Enterprise



Human User



External AI Agents Navigate Seamlessly

From Code Creation to Deterministic Verification



AI-Generated Code Explosion



Verification engine



Automated Sanitization & Runtime Monitoring

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The CIO Mandate: Strategic Imperatives for 2026–2028

Between 2026 and 2028, the role of the **Chief Information Officer** is expected to shift from managing technology services to leading **industrialized AI integration** and business strategy.

We (STKI) believe that a transition toward **intent-centric applications** and **autonomous agentic systems** will prioritize functional outcomes over traditional user interfaces.

To succeed CIOs must

- Modernize **legacy infrastructure** and **applications**
- Implement rigorous **finops** to control skyrocketing cloud costs
- Overhaul **data foundations** to ensure model accuracy.
- Cybersecurity strategies will evolve to focus on **identity protection** and **defensive ai,**
- Development teams must pivot from writing code to **verifying synthetic outputs**.

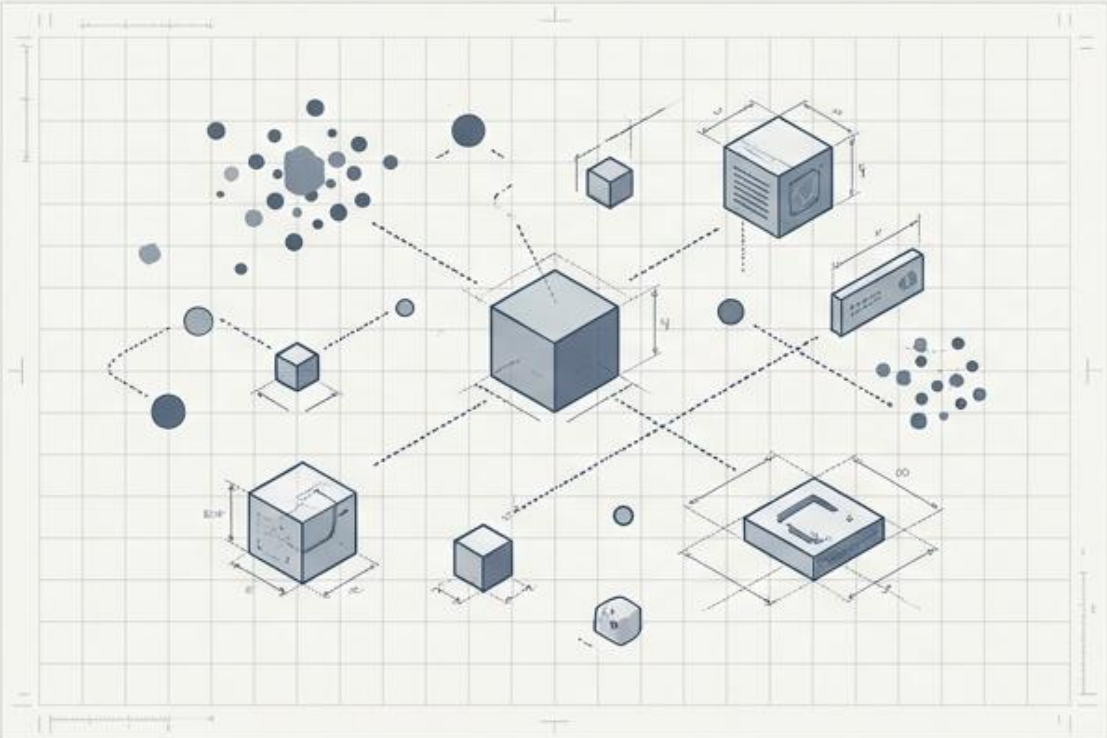
Ultimately, the mandate requires building a **machine-readable enterprise** that remains resilient amidst geopolitical volatility and rapid workforce shifts. This strategic roadmap emphasizes that future growth depends on dissolving the barriers between **technical execution** and **corporate innovation**.



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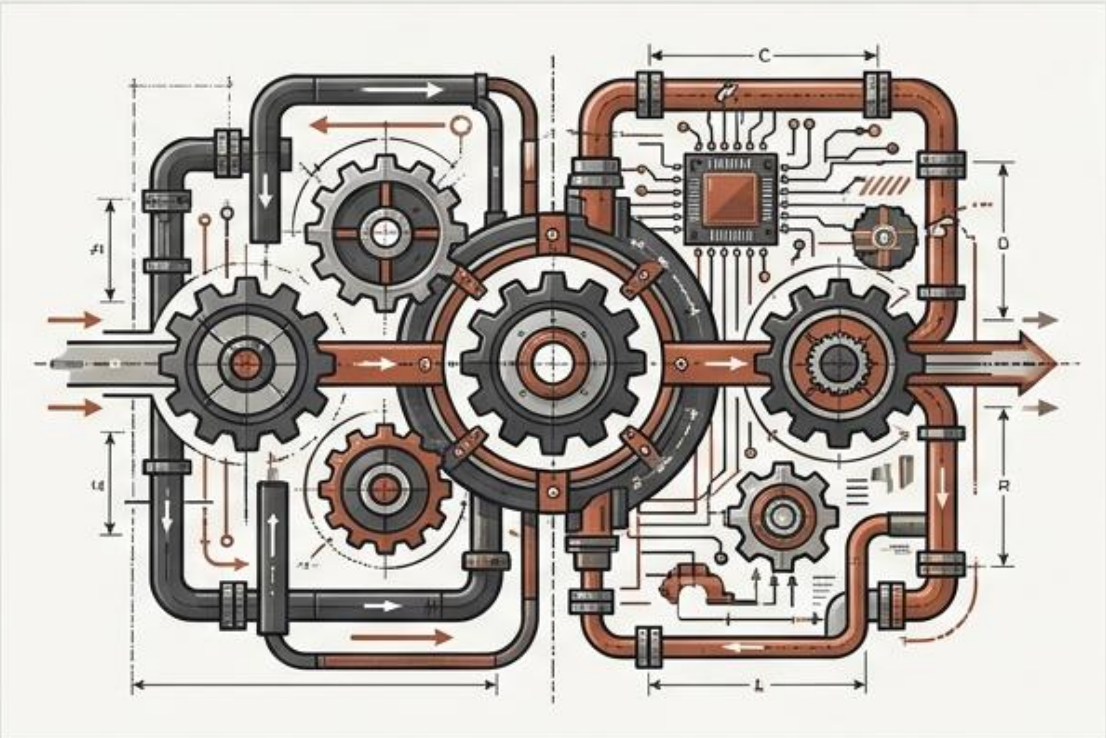
The role of the CIO is undergoing its most significant structural shift in a decade.

2023–2025: The Era of AI Experimentation



Characterized by Everyday AI productivity pilots, fragmented localized experimentation, and vanity metrics.

2026–2028: Industrialization & Accountability



The mandate shifts to extreme operational agility, financial accountability, and secure multi-agent ecosystems amid macroeconomic volatility.

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The Blueprint for the 2026–2028 Mandate



The Adaptive Organization

- Trigger-based planning, embedded IT, and human-AI workforce design.

The Industrialized Engine

- Agentic AI scaling, FinOps, and deterministic code verification.

The Zero-UI Architecture

- Intent-centric applications and headless AI integration.

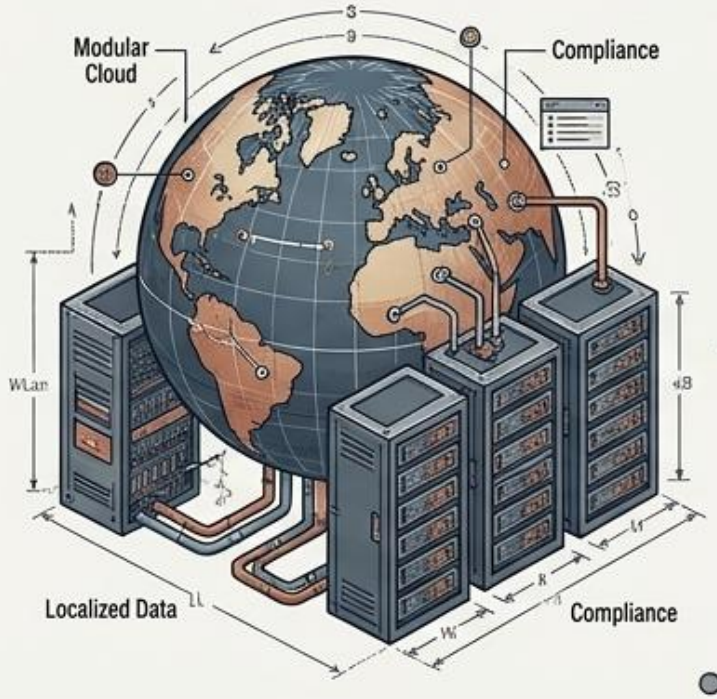
The Sovereign Foundation

- Data sanitization, debt mitigation, and geo-strategic sourcing.

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Pillar 1: The Sovereign & Modern Foundation

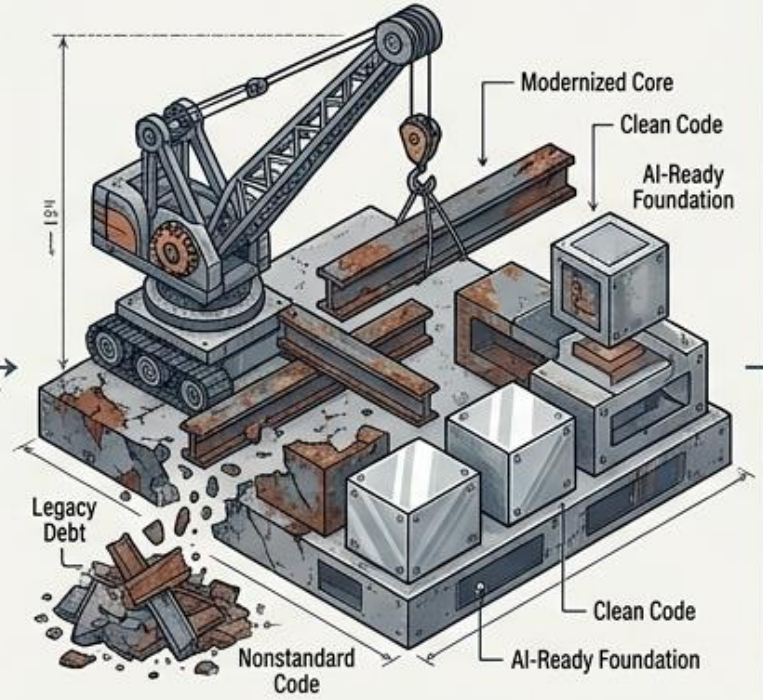
Navigating Digital Sovereignty



Geographic neutrality in IT sourcing is dead.

Build modular, sovereign-ready cloud architectures and localized data environments to guarantee compliance against escalating geopolitical tensions.

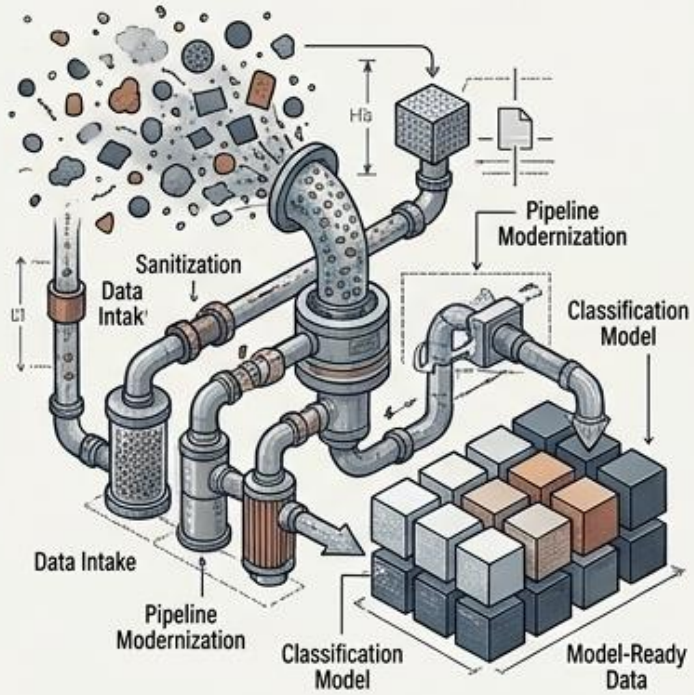
Ruthless Core Modernization



Ruthless Core Modernization

Legacy systems are anchors. Mitigate technical debt by aggressively retiring outdated shelfware and nonstandard codebases to remove friction friction for AI integration.

The Single Version of the Truth



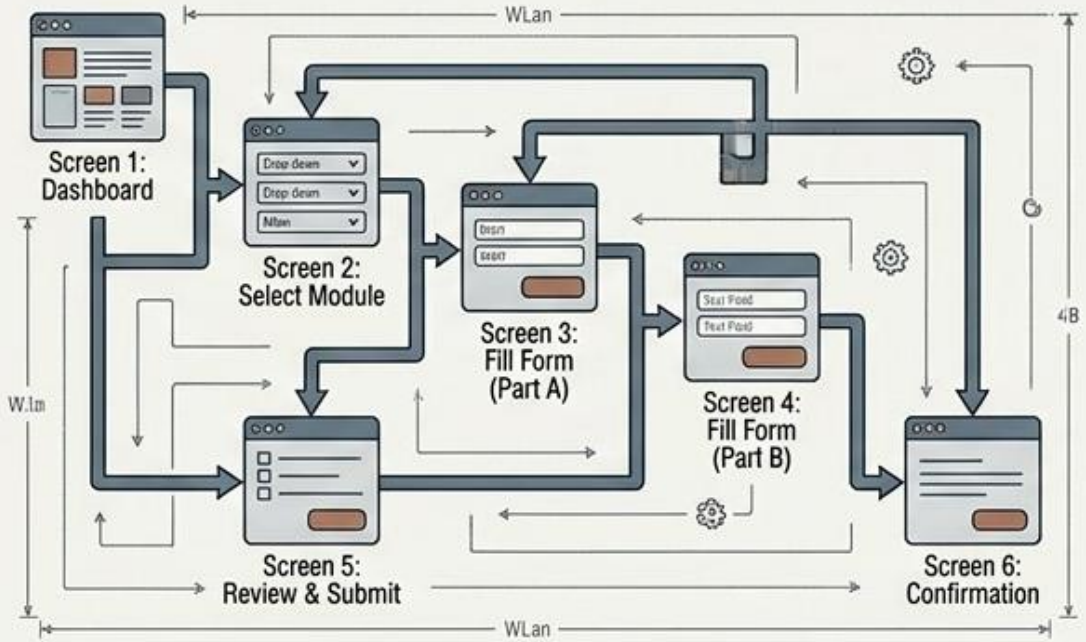
The Single Version of the Truth

AI is only as good as its data. Dedicate capital to strict data sanitization, modernized pipelines, and classification models to achieve absolute model readiness.

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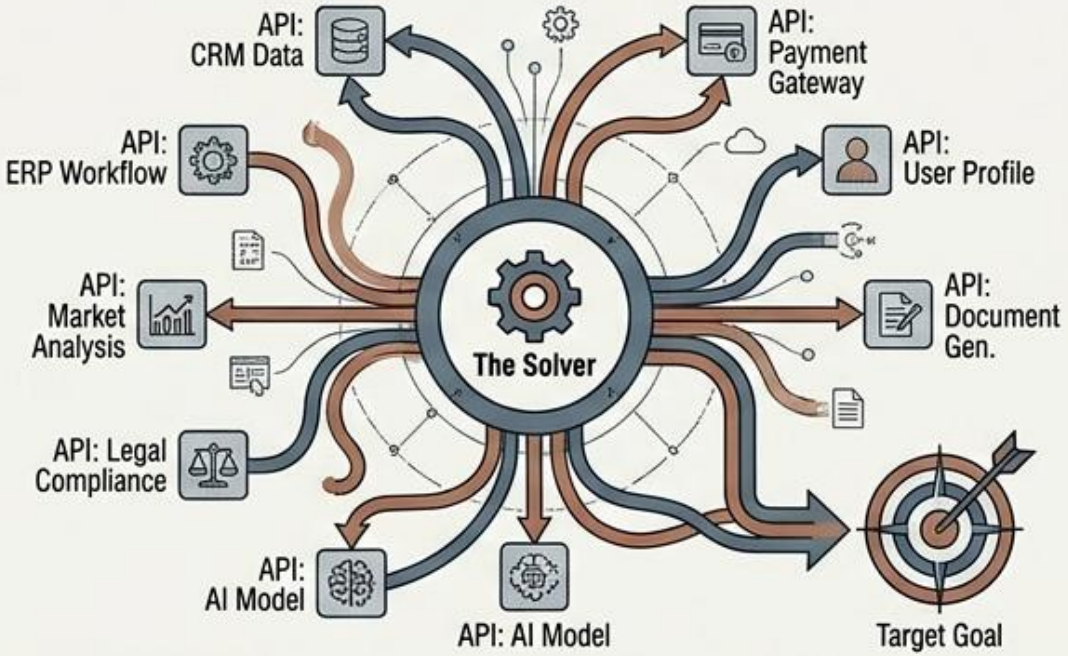
Pillar 2: The Shift to Intent-Centric Applications

App-Centric (Rigid UI)



Stop building fixed workflow screens. Traditional software forces users through rigid, predetermined click-paths.

Intent-Centric (Dynamic Synthesizer)

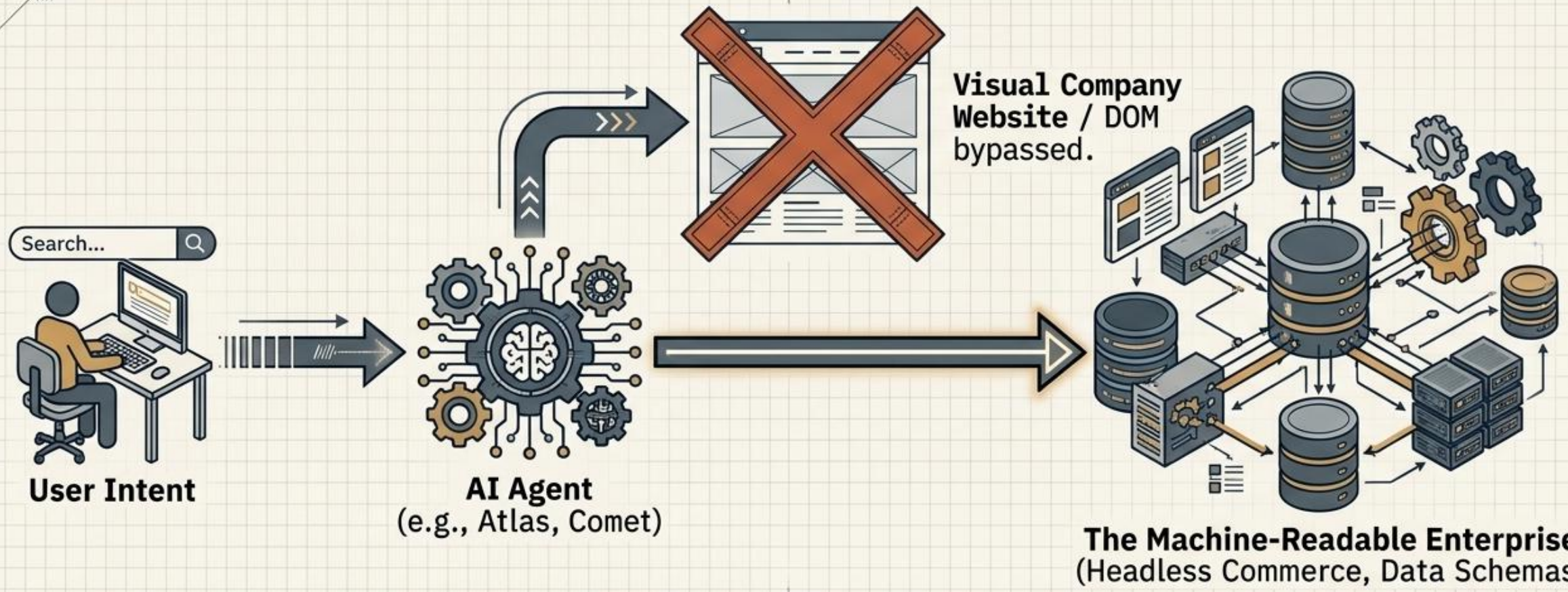


Expose core business logic as APIs. The system acts as a solver. A user states an end goal, and the architecture dynamically aggregates the necessary workflows.

Hyper-Personalization Evolved: Context-management systems now dynamically synthesize completely custom UI and data visualizations on the fly.

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The Zero-UI Intercept Forced by AI Browsers



The Threat:

Traditional web traffic, visual branding, and fixed interfaces are losing their grip. AI intermediaries are extracting data and executing actions on behalf of customers.

The Strategy:

Optimize the Machine-Readable Enterprise. Structure data schemas and headless layers so external AI agents can find, trust, and purchase services seamlessly—without a human ever viewing the webpage.

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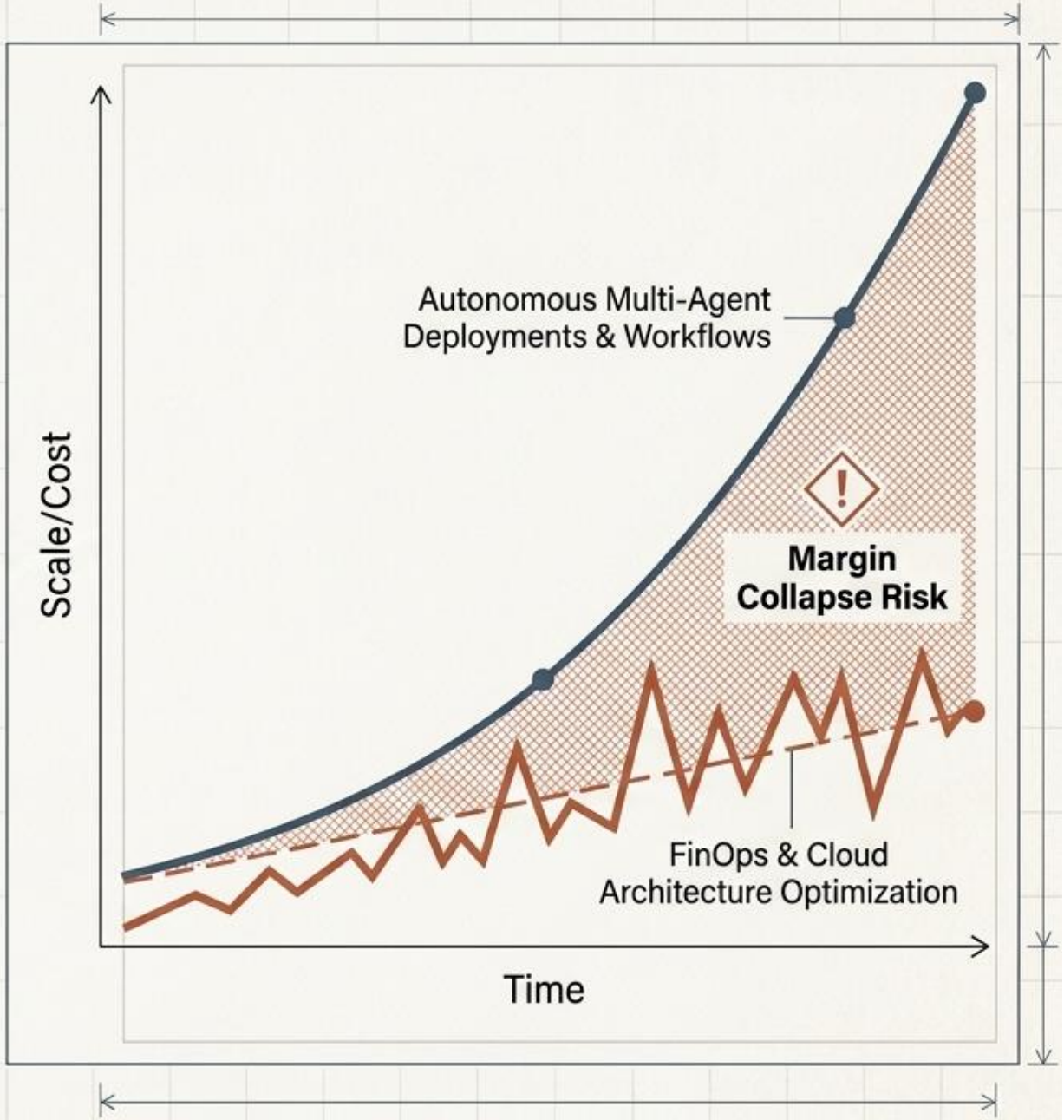
Pillar 3: The Industrialized AI Engine & FinOps Expansion

Scale the Enterprise

Transition from Everyday AI to autonomous multi-agent systems handling complex workflows. Shift focus from vanity metrics to **measurable financial impact—net-new revenue or hard cost reduction.**

Control the Cloud

Avoid the sting of skyrocketing computing costs. Aggressively expand FinOps practices to manage token consumption, optimize cloud architectures, and establish granular cost-transparency mechanisms.



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Governing the 1,000 Deploys Crisis

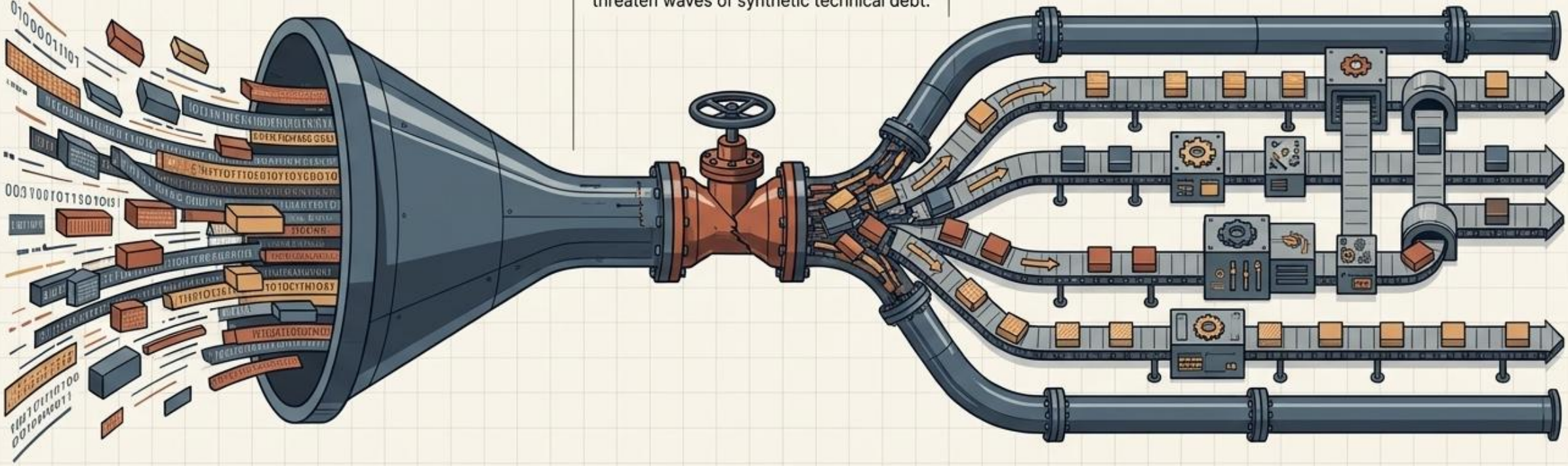
AI Programming Explosion (e.g., Claude Code)

Writing code is no longer the bottleneck.

Traditional QA & Security

Codebases inflating at unprecedented rates threaten waves of synthetic technical debt.

Deterministic Verification & Sanitization Loops

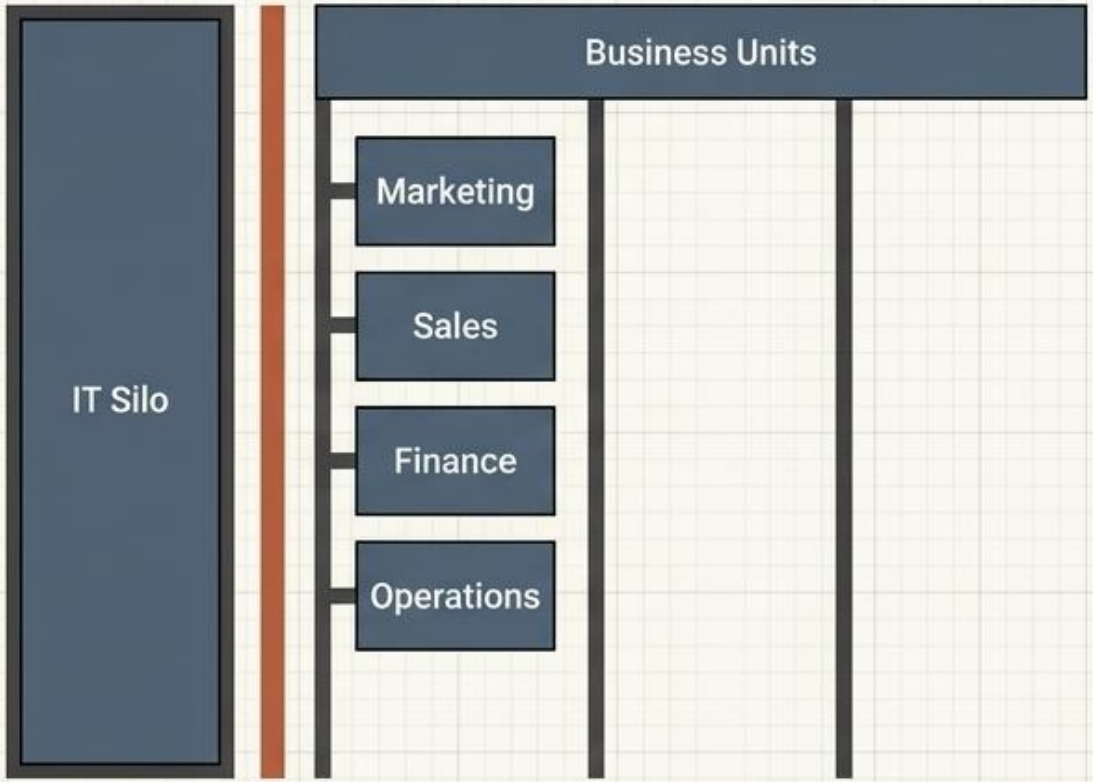


The Paradigm Shift: Engineering teams are no longer **bottlenecked by writing code; they are bottlenecked by verifying code. Shift engineering culture to deterministic verification and runtime monitoring to catch vulnerabilities pre-production.**

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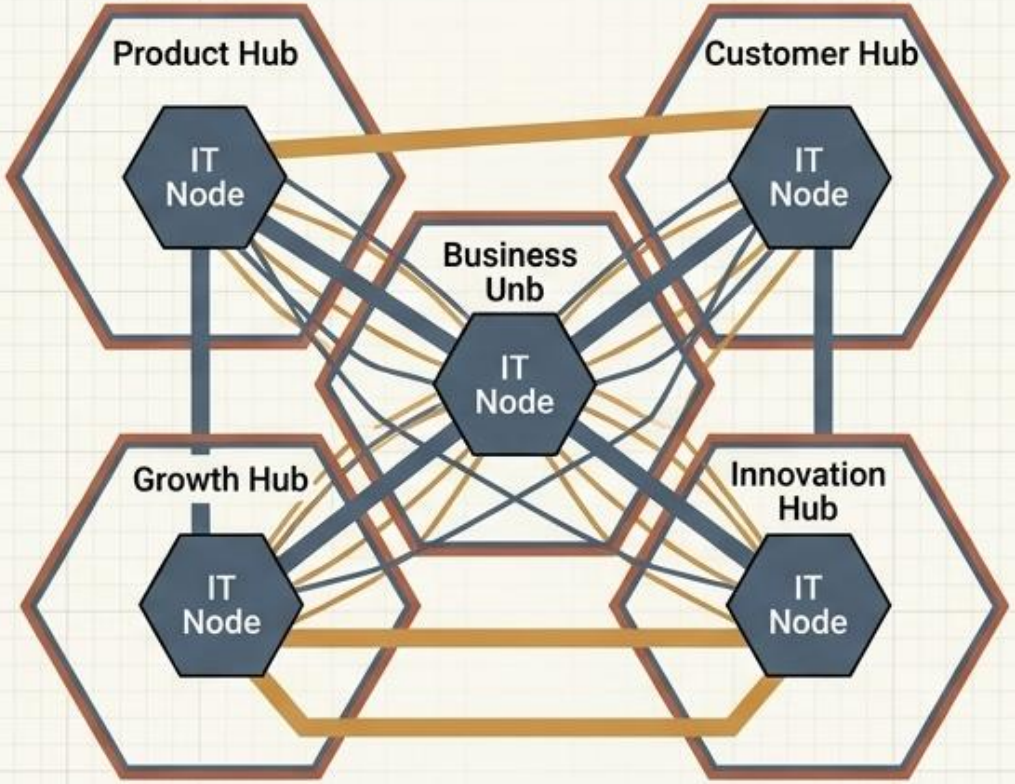
Pillar 4: The Adaptive Organization & Human-AI Workforce

Redesigning the Operating Model



The boundary between IT and the business is dissolving. Transition from an order-taking service provider to an embedded co-creator via cross-functional, product-oriented teams.

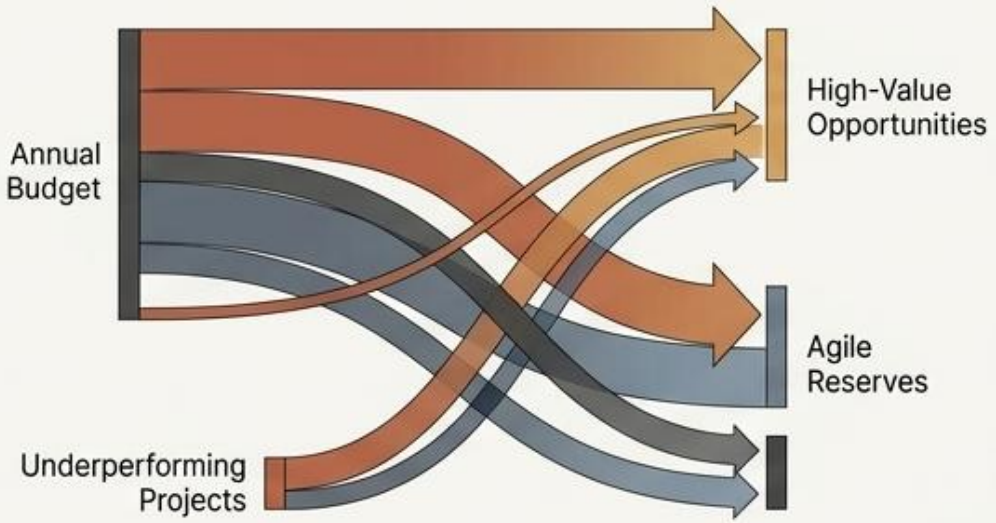
Workforce Strategy



Abandon impossible hiring targets. Rapidly upskill and transition internal tech talent from traditional development toward automation oversight, model evaluation, and AI guardrail management.

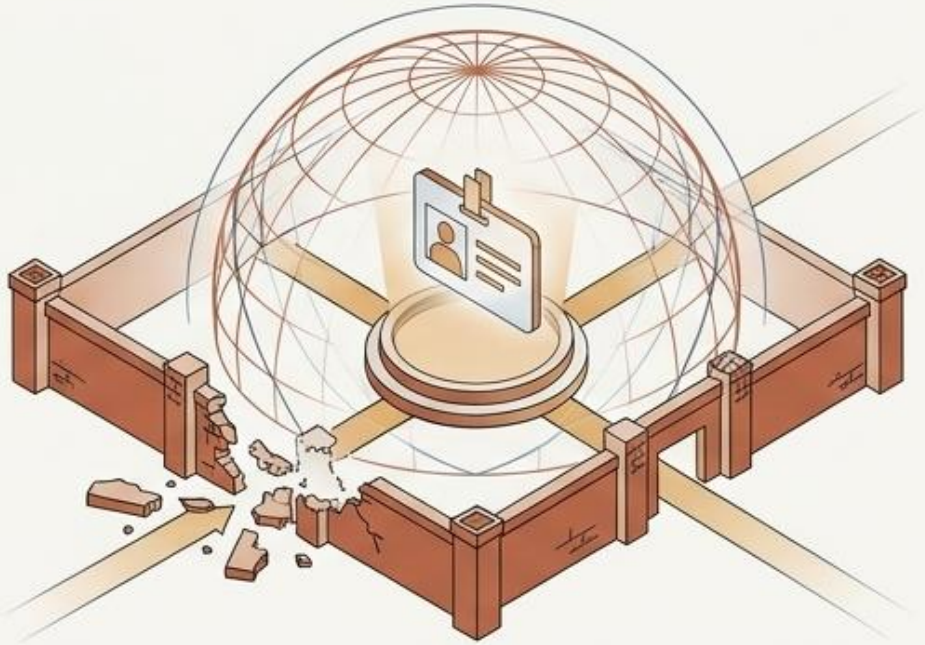
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Continuous, Trigger-Based Planning



Traditional annual IT planning cannot survive market volatility. Establish continuous frameworks to actively kill underperforming projects mid-flight and instantly shift capital to high-value opportunities.

Identity-Centric Cybersecurity

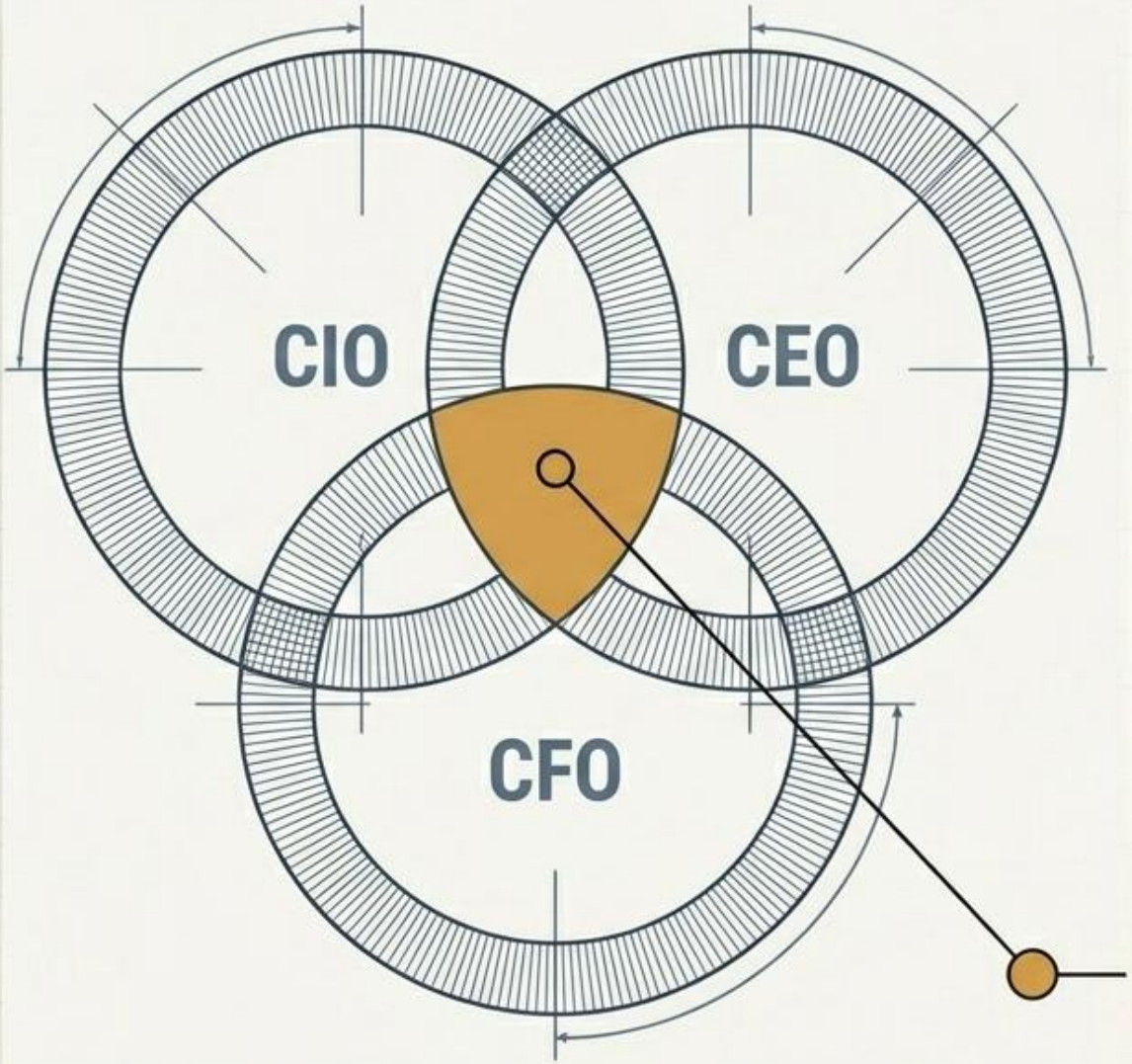


Defend against automated supply-chain infiltration and synthetic identities. Transition to identity protection, zero-trust frameworks, continuous API monitoring, and real-time defensive AI.

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Partnering on Business Model Innovation

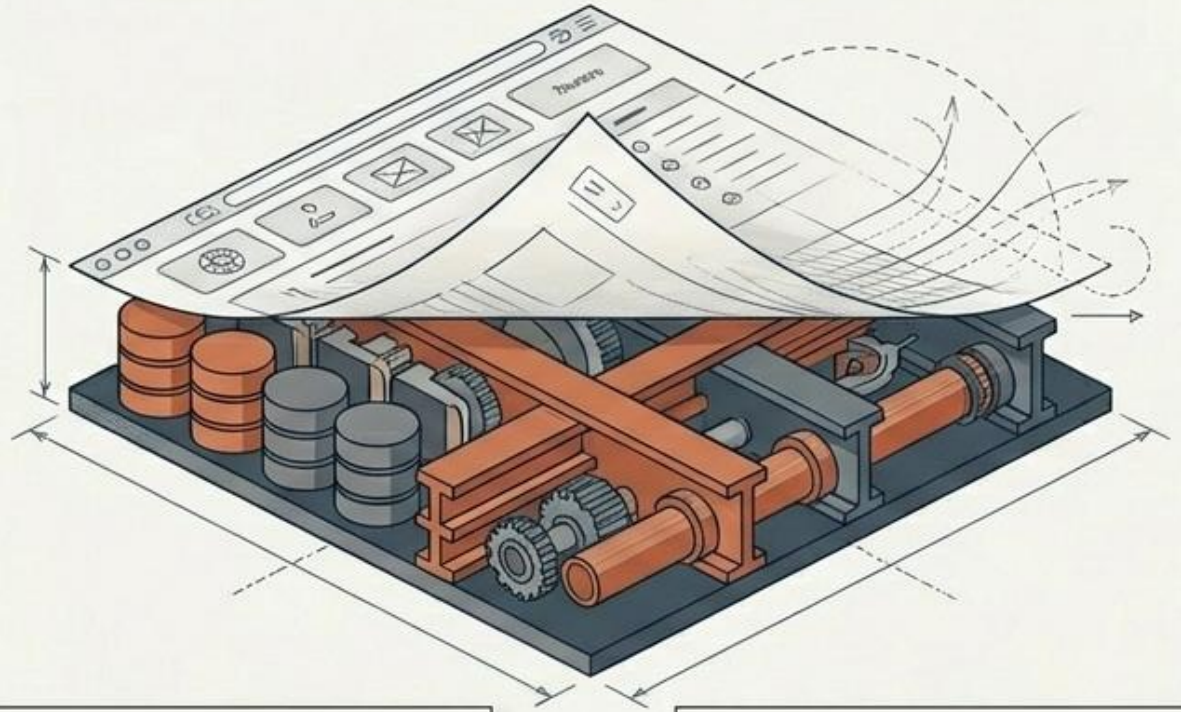
- **The Metric of Success:** CIOs are no longer judged solely on system uptime; they are judged on enterprise growth.
- **The Executive Triad:** Transformational CIOs must work hand-in-hand with the CEO and CFO to design new business realities.



- **The Deliverables:** Designing intent-centric software experiences and creating net-new data-monetization streams.
- **The Mandate:** IT now sits at the exact center of corporate growth strategy.

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The Ultimate Paradox: The Decoupling of Software



The Dynamic: As AI programming dramatically lowers the cost of generating software, AI browsers and intent-centric backends simultaneously strip away the traditional visual UI.

The Synthesis: The visual interface is dead. Survival in the 2026–2028 window requires an uncompromising focus on the architectural core: pristine data precision, robust API infrastructure, and ironclad verification guardrails.

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The Great IT Realignment

Dimension	Traditional IT (Pre-2025)	The AI Enterprise (2026-2028)
Interface	Fixed / Visual UI	Intent-Centric / Zero-UI APIs
Development	Human Code Creation	AI Generation + Deterministic Human Verification
Budgeting	Annual / Static Allocation	Continuous / Trigger-Based Reallocation
Security Focus	Perimeter Defense	Identity-Centric & API Monitoring
Primary Goal	System Uptime & Service	Enterprise Growth & Co-Creation

NotebookLM

The 2026 Readiness Checklist

Foundation

Is our data sanitized and structured as a single version of truth for multi-agent orchestration?

Zero-UI

Are our headless API layers optimized for external AI agent discovery and transaction?

Engineering

Have we installed automated sanitization loops to manage the massive influx of AI-generated code?

Capital

Do we have the framework to ruthlessly kill underperforming projects mid-flight and reallocate funds?



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The Public Sector CIO Mandate:

All the above plus implement and use all layers of NIMBUS

The CIO Mandate: Strategic Imperatives for 2026–2028

Between 2026 and 2028, the role of the **Chief Information Officer** is expected to shift from managing technology services to leading **industrialized AI integration** and business strategy.

We (STKI) believe that a transition toward **intent-centric applications** and **autonomous agentic systems** will prioritize functional outcomes over traditional user interfaces.

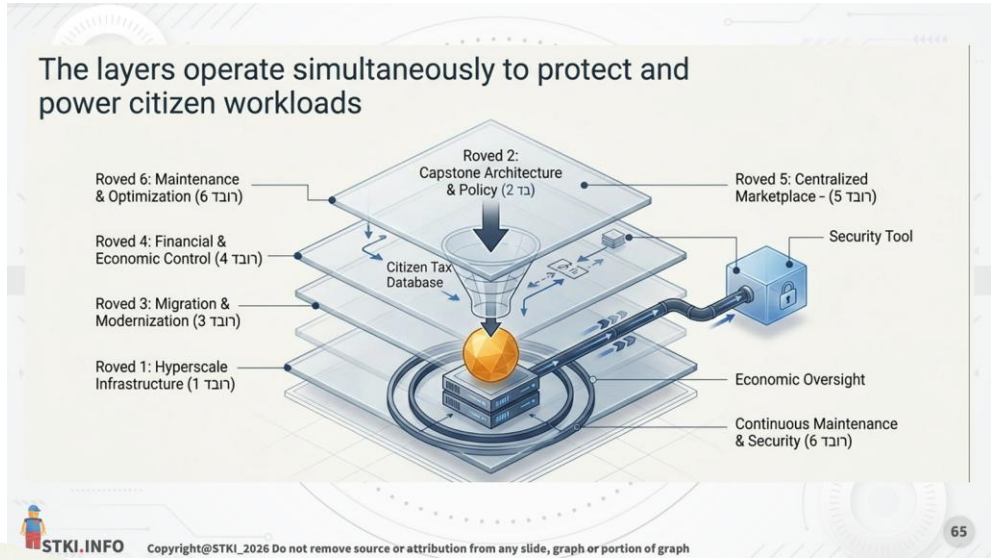
To succeed CIOs must

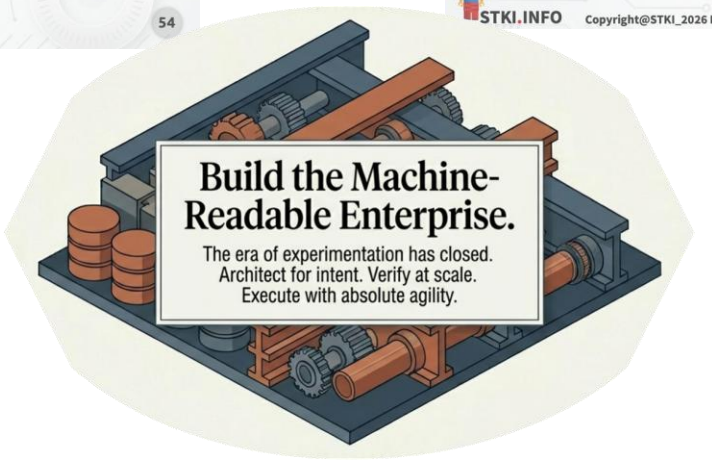
- Modernize **legacy infrastructure** and **applications**
- Implement rigorous **finops** to control skyrocketing cloud costs
- Overhaul **data foundations** to ensure model accuracy.
- Cybersecurity strategies will evolve to focus on **identity protection** and **defensive ai,**
- Development teams must pivot from writing code to **verifying synthetic outputs**.

Ultimately, the mandate requires building a **machine-readable enterprise** that remains resilient amidst geopolitical volatility and rapid workforce shifts. This strategic roadmap emphasizes that future growth depends on dissolving the barriers between **technical execution** and **corporate innovation**.

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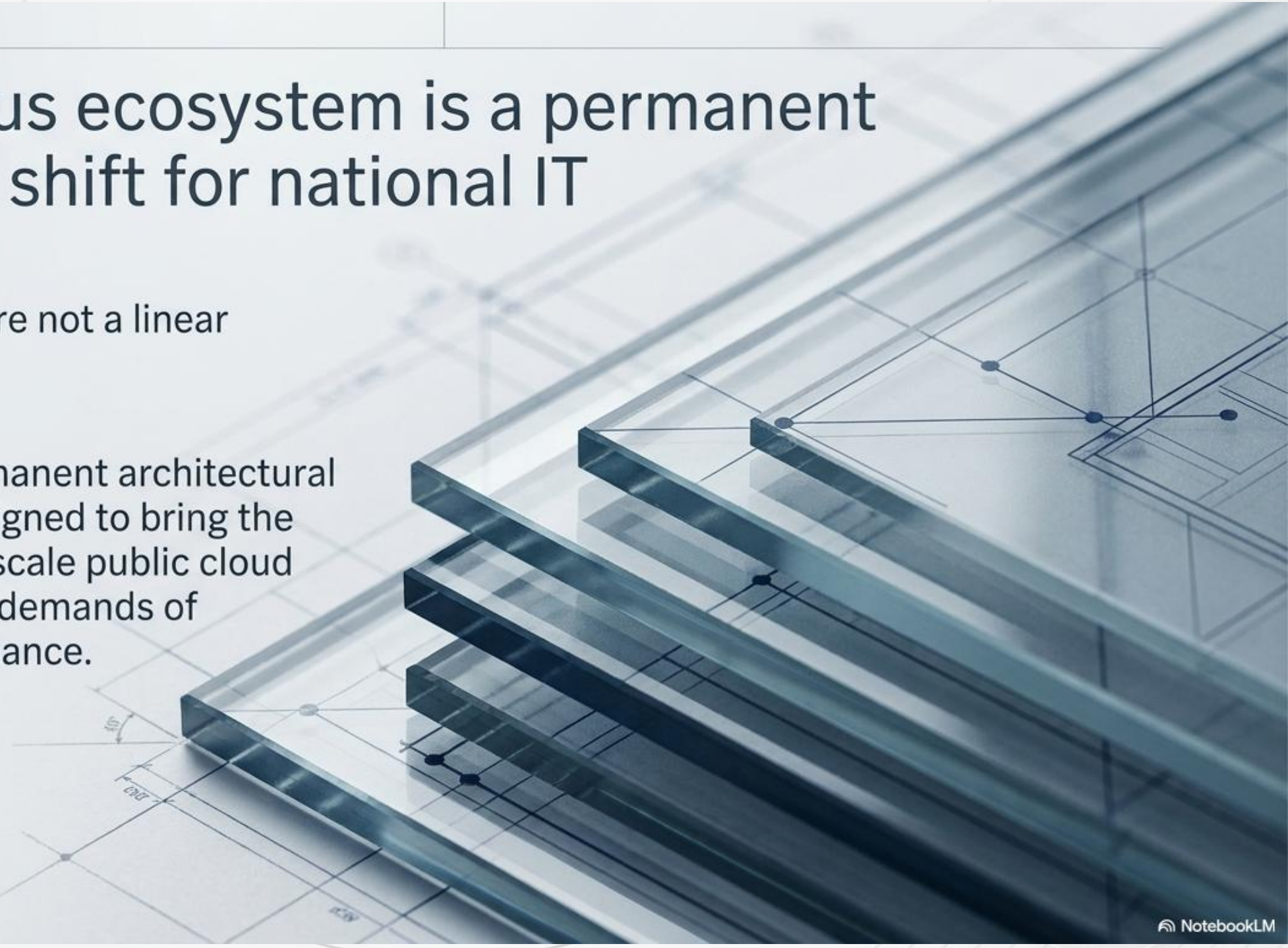




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The Nimbus ecosystem is a permanent structural shift for national IT

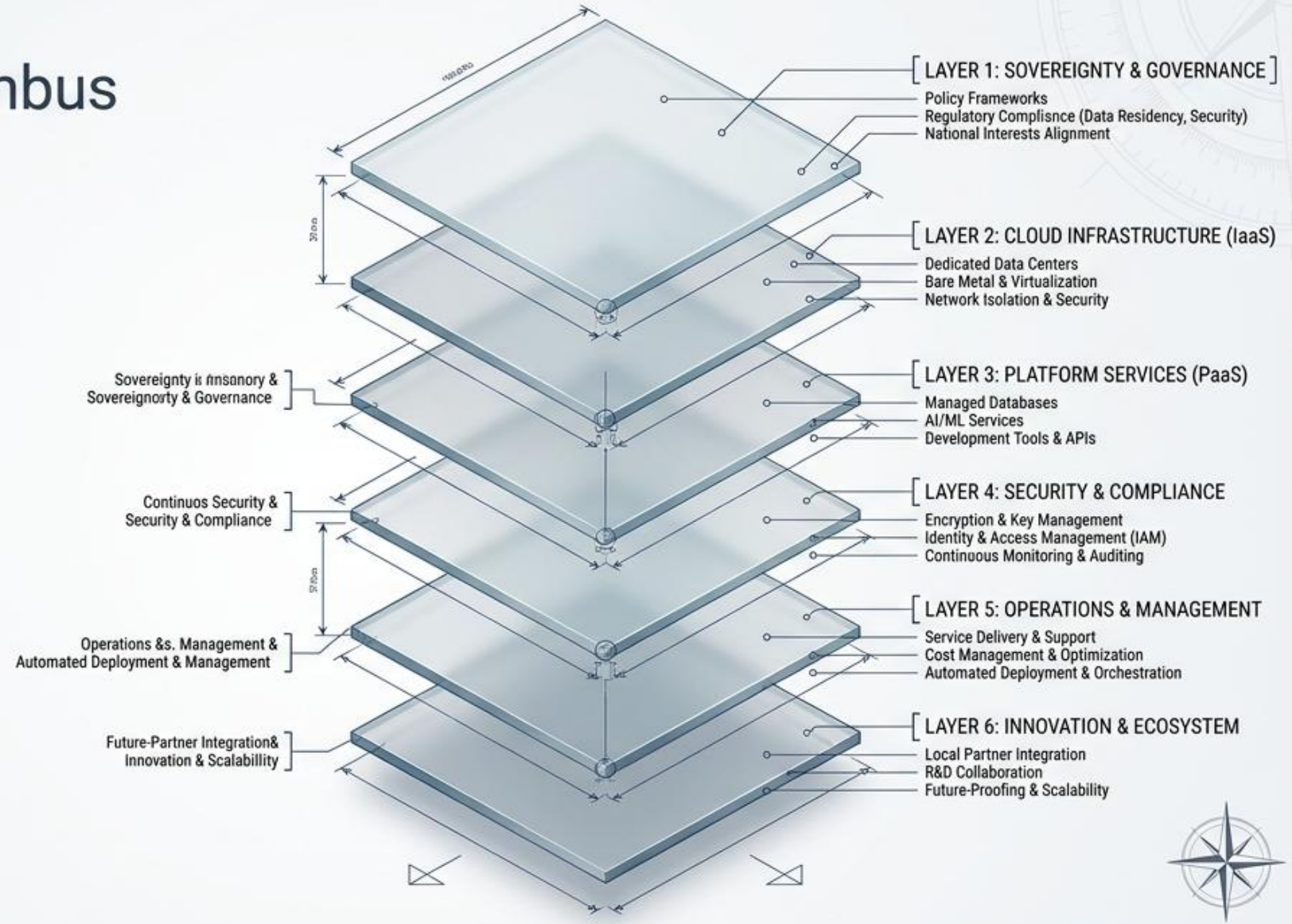
- The 6 Roveds are not a linear project plan.
- They are a permanent architectural framework designed to bring the agility of hyperscale public cloud to the rigorous demands of national governance.



NotebookLM

The Architectural Blueprint of the Nimbus Project Lifecycle

- A strategic guide to the six functional layers governing Israel's sovereign cloud ecosystem.
- Designed for institutional stakeholders, cloud architects, and CCoE leadership.



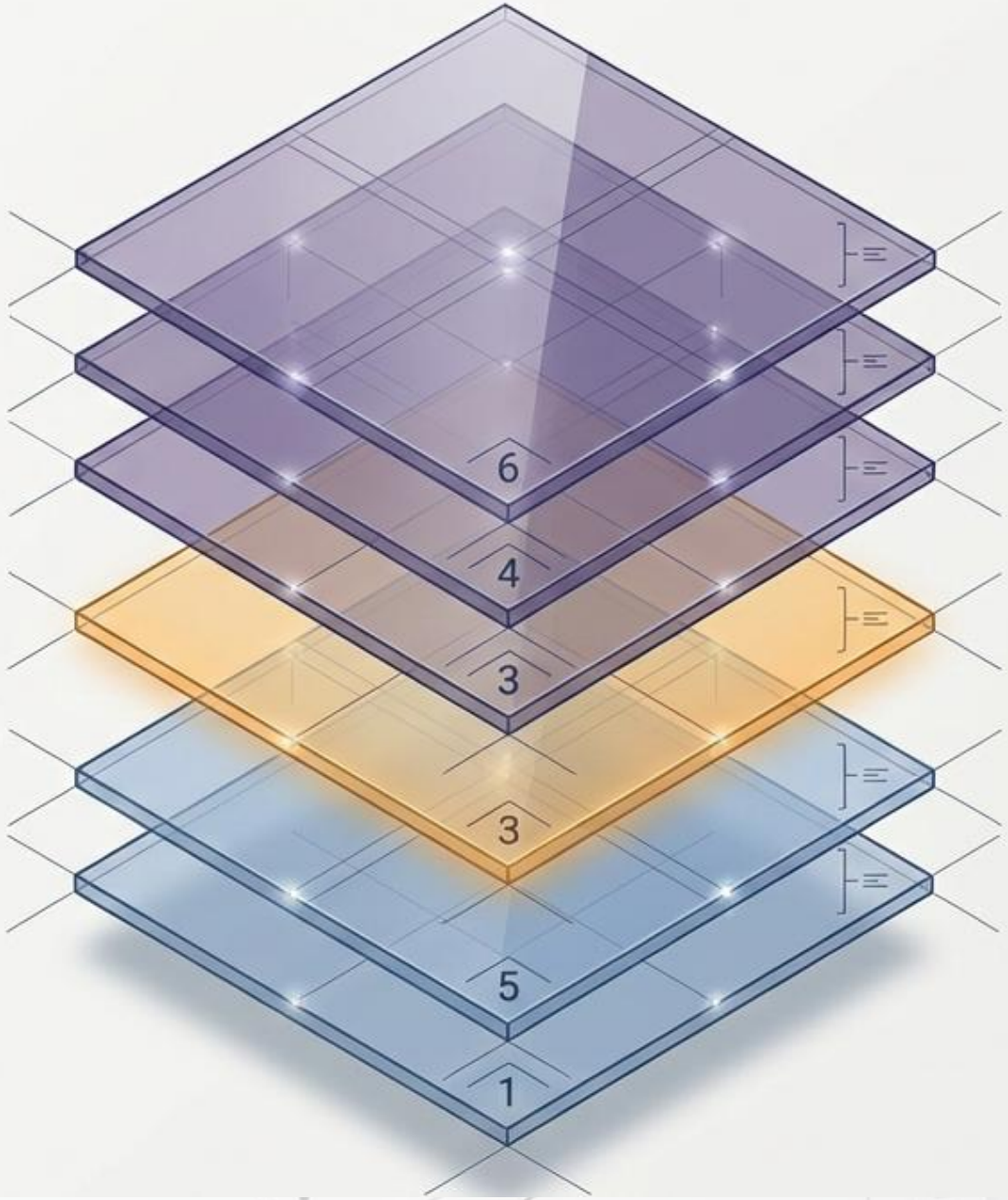
PROJECT: NIMBUS LIFECYCLE		DRAWING NO: A-101
SCALE: N.T.S.	DATE: OCT 26, 2023	REV: 1.0

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THE CONTROL:
Strategy, Financial Optimization, and Long-Term Operations.

THE TRANSITION:
Modernization and Migration of legacy assets.

THE SUBSTRATE:
Physical hyperscale infrastructure and third-party software marketplaces.



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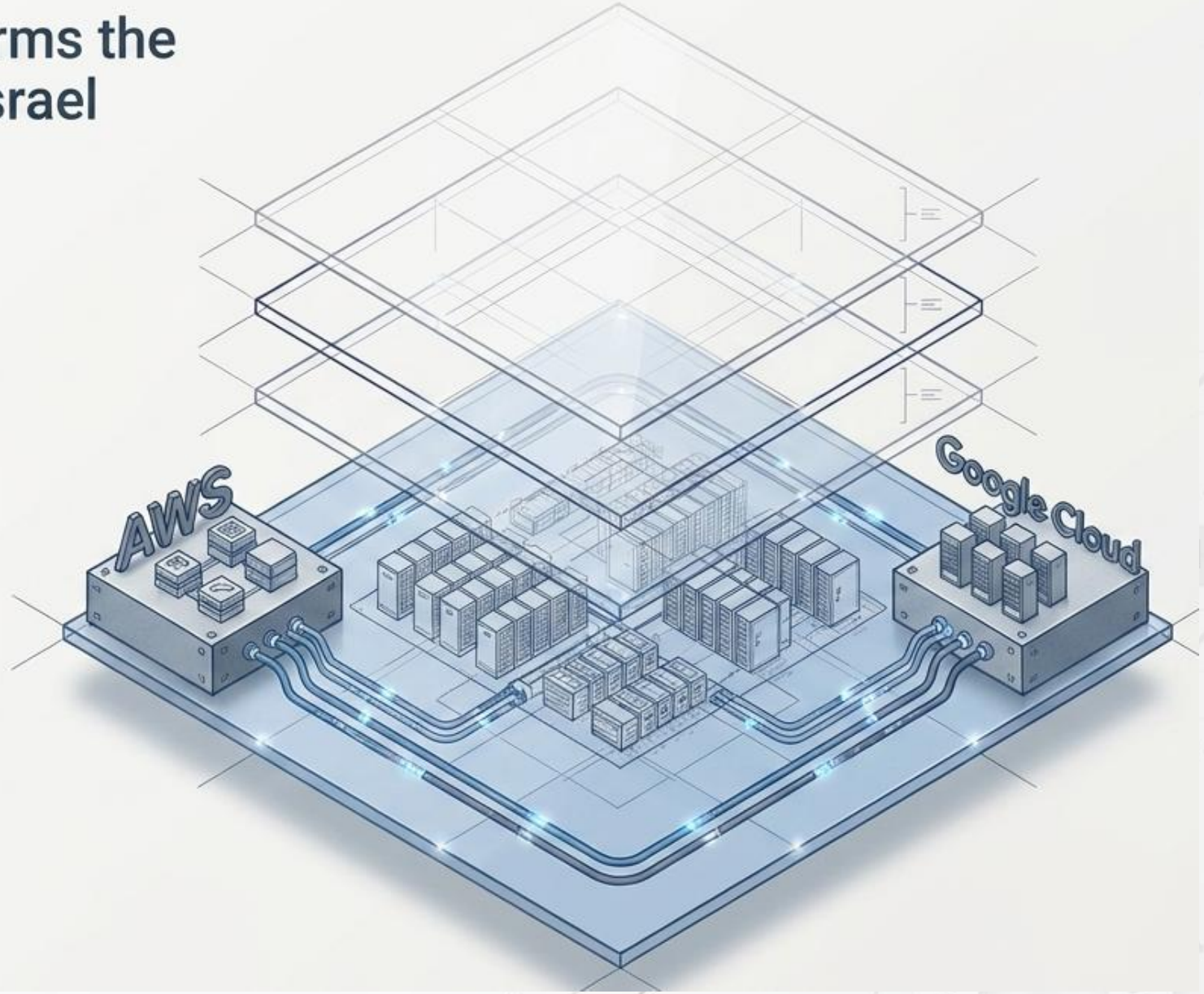
Hyperscale infrastructure forms the physical foundation within Israel

Layer 1:
Public Cloud Infrastructure (רובד 1)

The Objective:
Provisioning core public cloud services.

The Reality:
AWS and Google Cloud build and supply the hyperscale computing power.

Crucially, this relies on local data center regions established directly within Israel for data sovereignty.



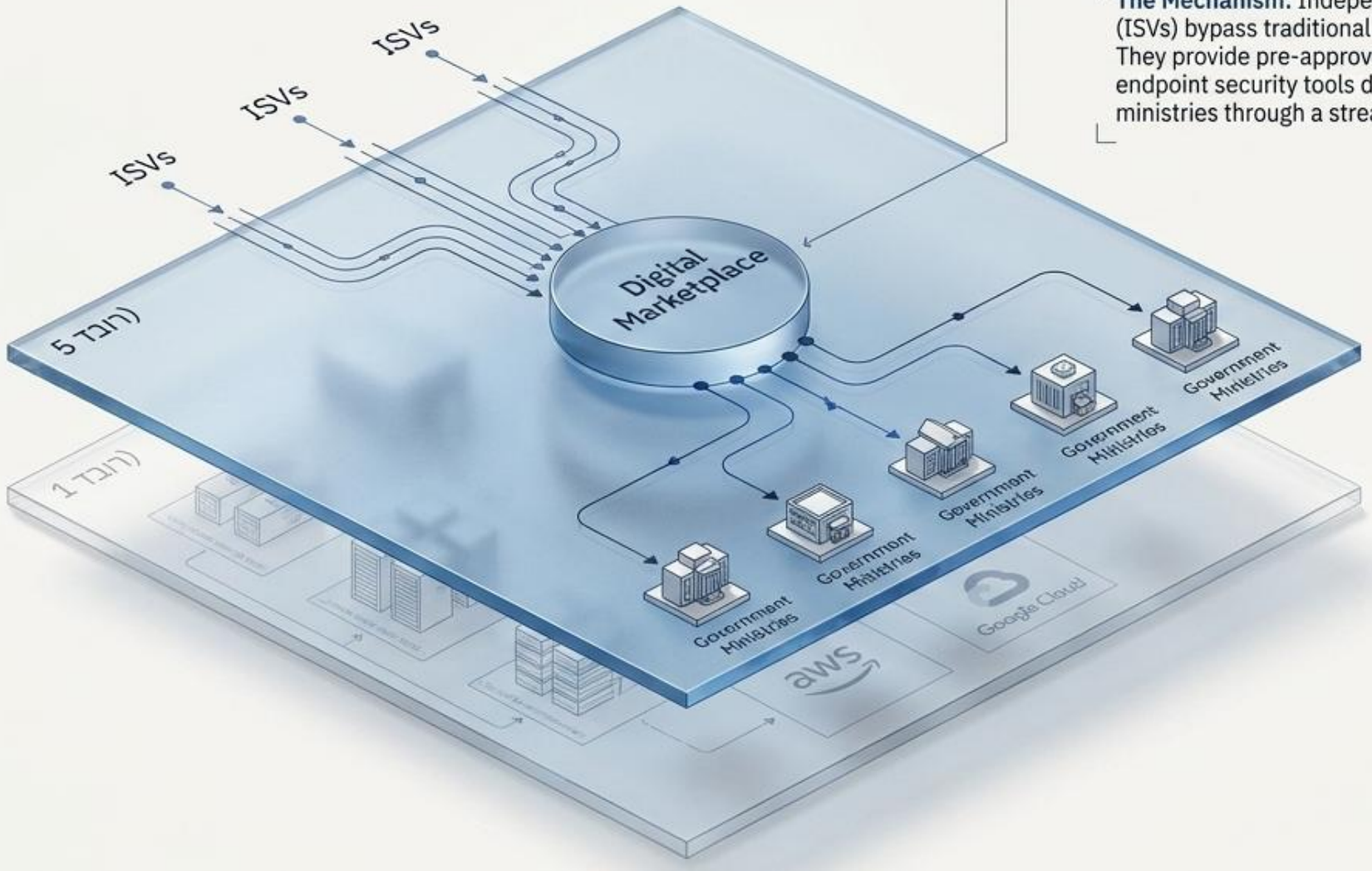
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A centralized marketplace bypasses friction for pre-approved software

Layer 5: Digital Marketplace & SaaS (רובד 5)

The Objective: Creating a centralized ecosystem for third-party software.

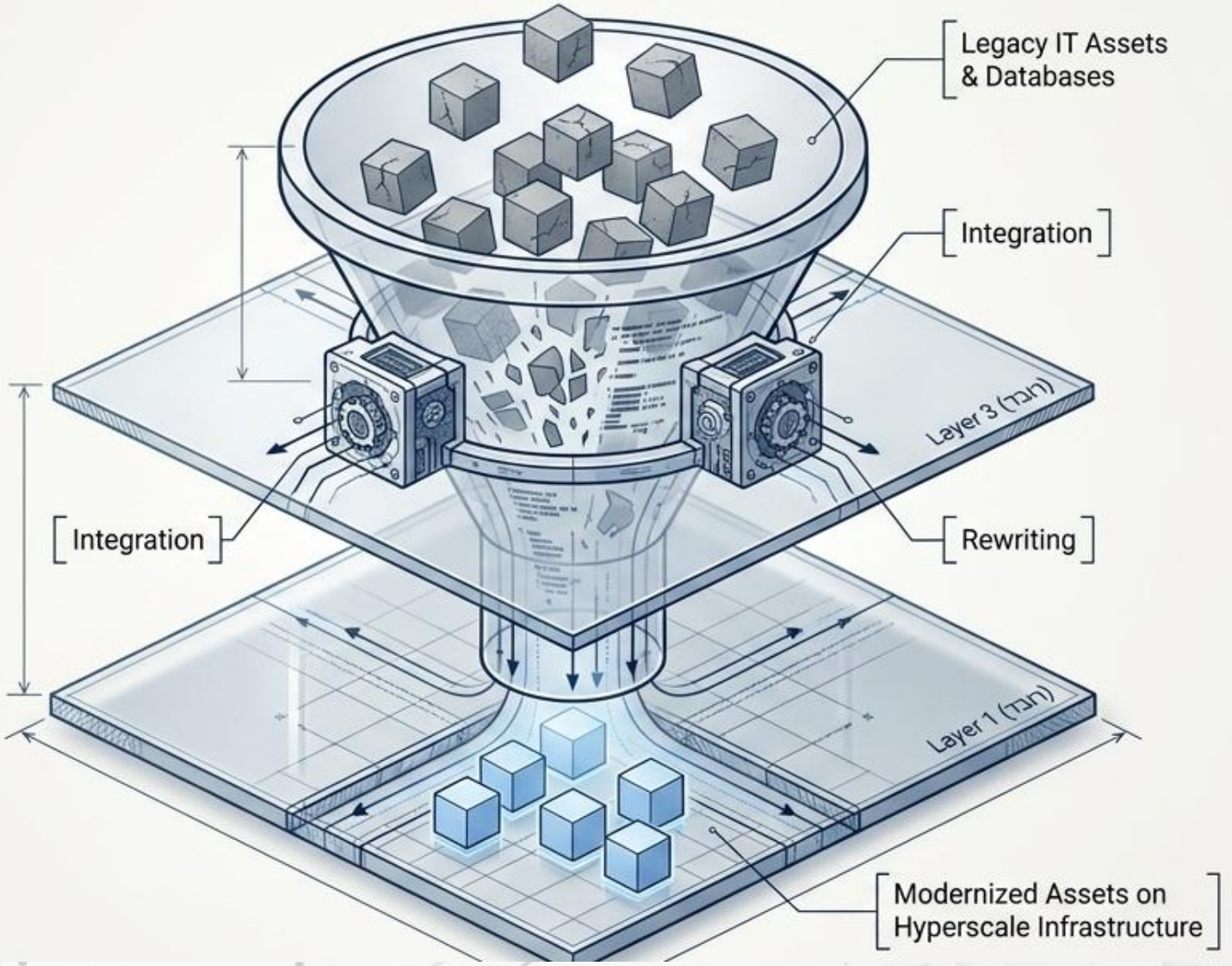
The Mechanism: Independent Software Vendors (ISVs) bypass traditional procurement bottlenecks. They provide pre-approved SaaS, CRM, and endpoint security tools directly to individual ministries through a streamlined digital hub.



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The migration engine transforms legacy assets for the public cloud

- **Layer 3:** Migration and Modernization (רובד 3)
- **The Objective:** Moving and modernizing existing IT assets.
- **The Process:** The managed relocation, deep integration, and code rewriting required to transition legacy government systems into the modern hyperscale infrastructure.

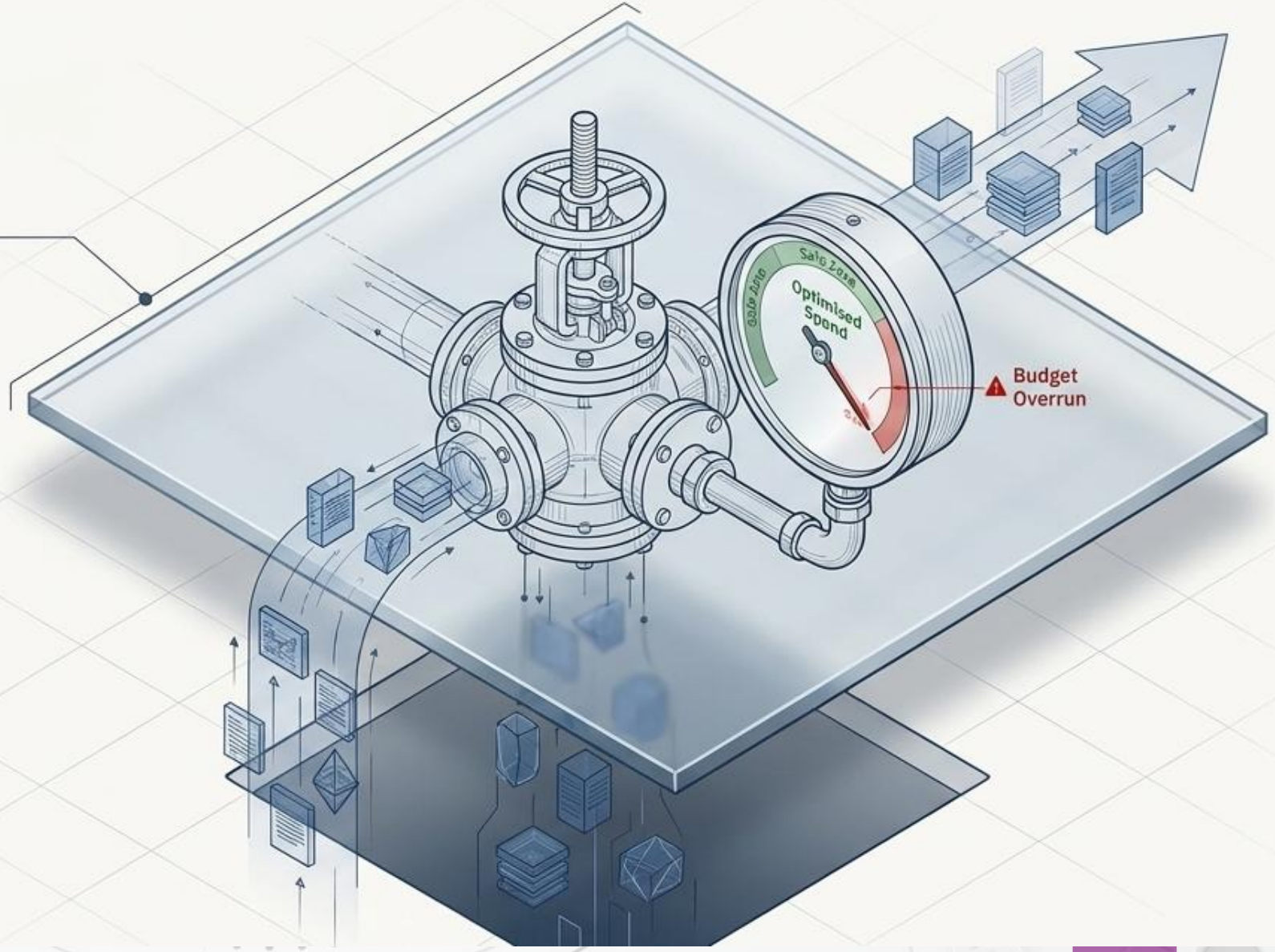


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FinOps practices prevent budget overruns through continuous optimization

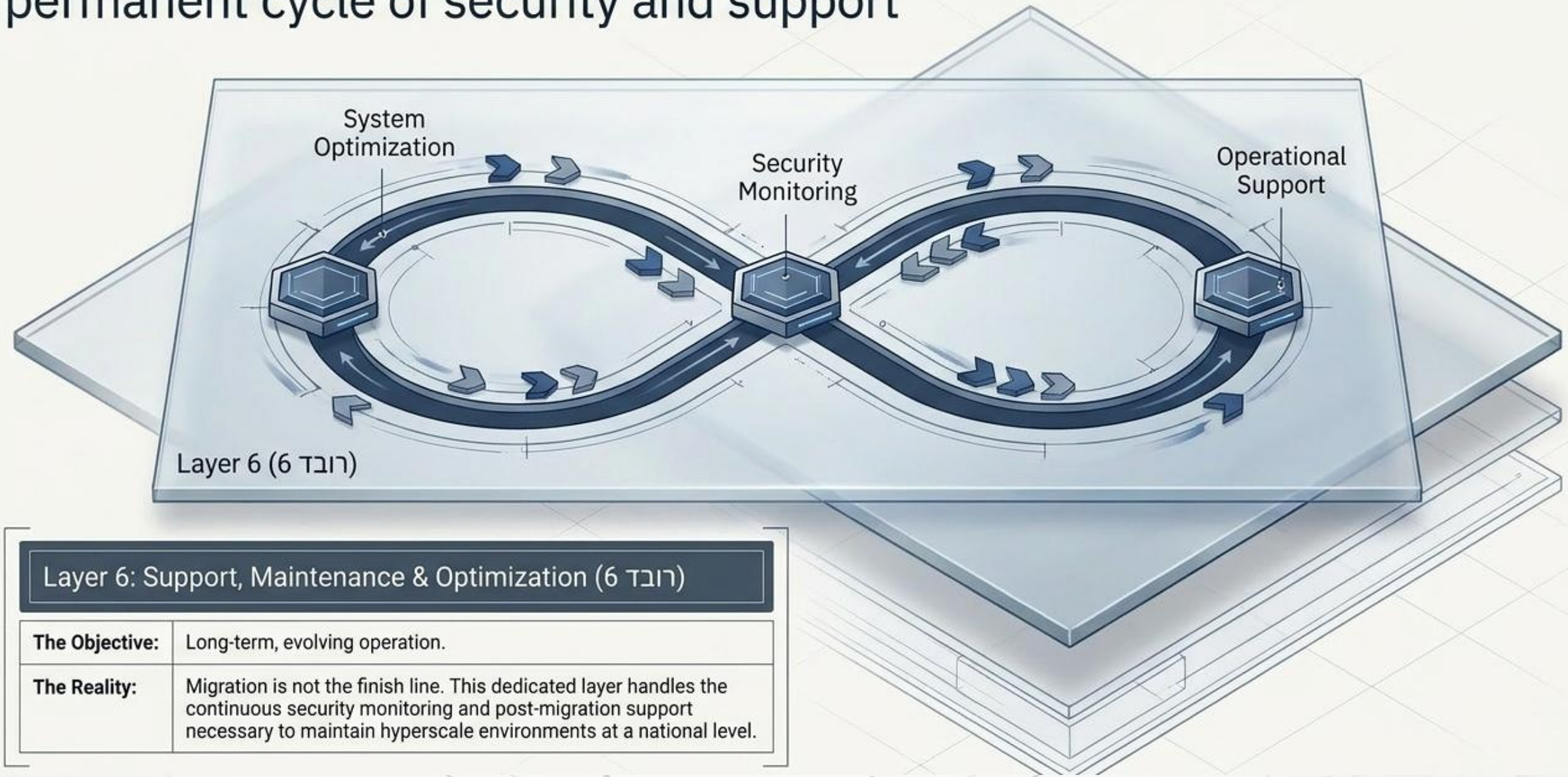
Layer 4: Cloud Economics / FinOps (4 רובד)

The Objective:	Financial optimization and strict resource control.
The Function:	Utilizing specialized FinOps practices to constantly monitor, analyze, and optimize cloud consumption costs across all participating government entities.



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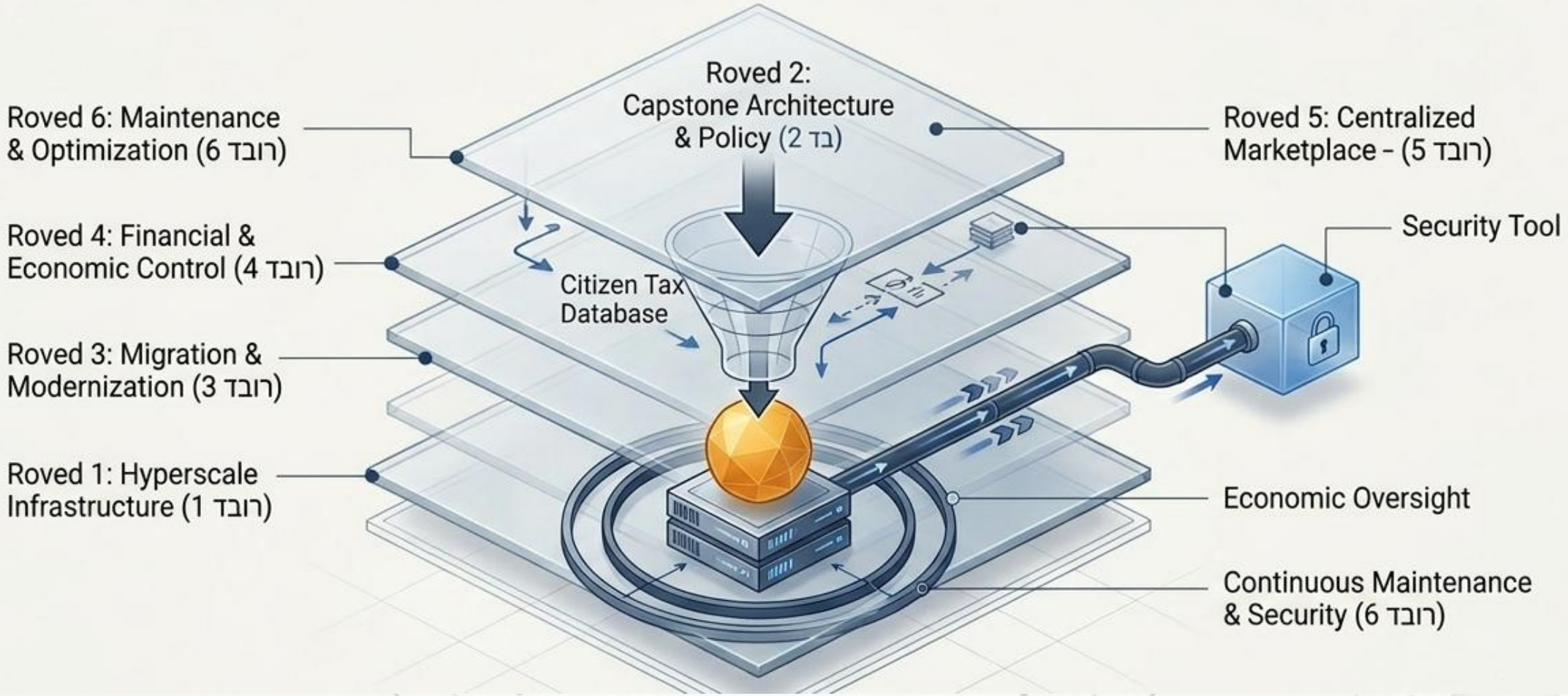
Post-migration operations require a permanent cycle of security and support



Layer 6: Support, Maintenance & Optimization (רובד 6)	
The Objective:	Long-term, evolving operation.
The Reality:	Migration is not the finish line. This dedicated layer handles the continuous security monitoring and post-migration support necessary to maintain hyperscale environments at a national level.

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The layers operate simultaneously to protect and power citizen workloads



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The Nimbus Capability Matrix

	Primary Actor	Core Objective	Target Output
Roved 1	AWS & Google	Compute Provisioning	Local Hyperscale Data Centers
Roved 2	National Digital Agency & CCoE	Framework Governance	Unified Cloud Policy
Roved 3	Migration Teams	Asset Relocation	Modernized Code & Integrated Databases
Roved 4	FinOps Leaders	Cost Control	Prevented Budget Overruns
Roved 5	ISVs	Centralized Ecosystem	Pre-approved SaaS & CRM
Roved 6	Cloud Operators	Evolving Operations	Continuous Security Monitoring



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Surveys





Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen

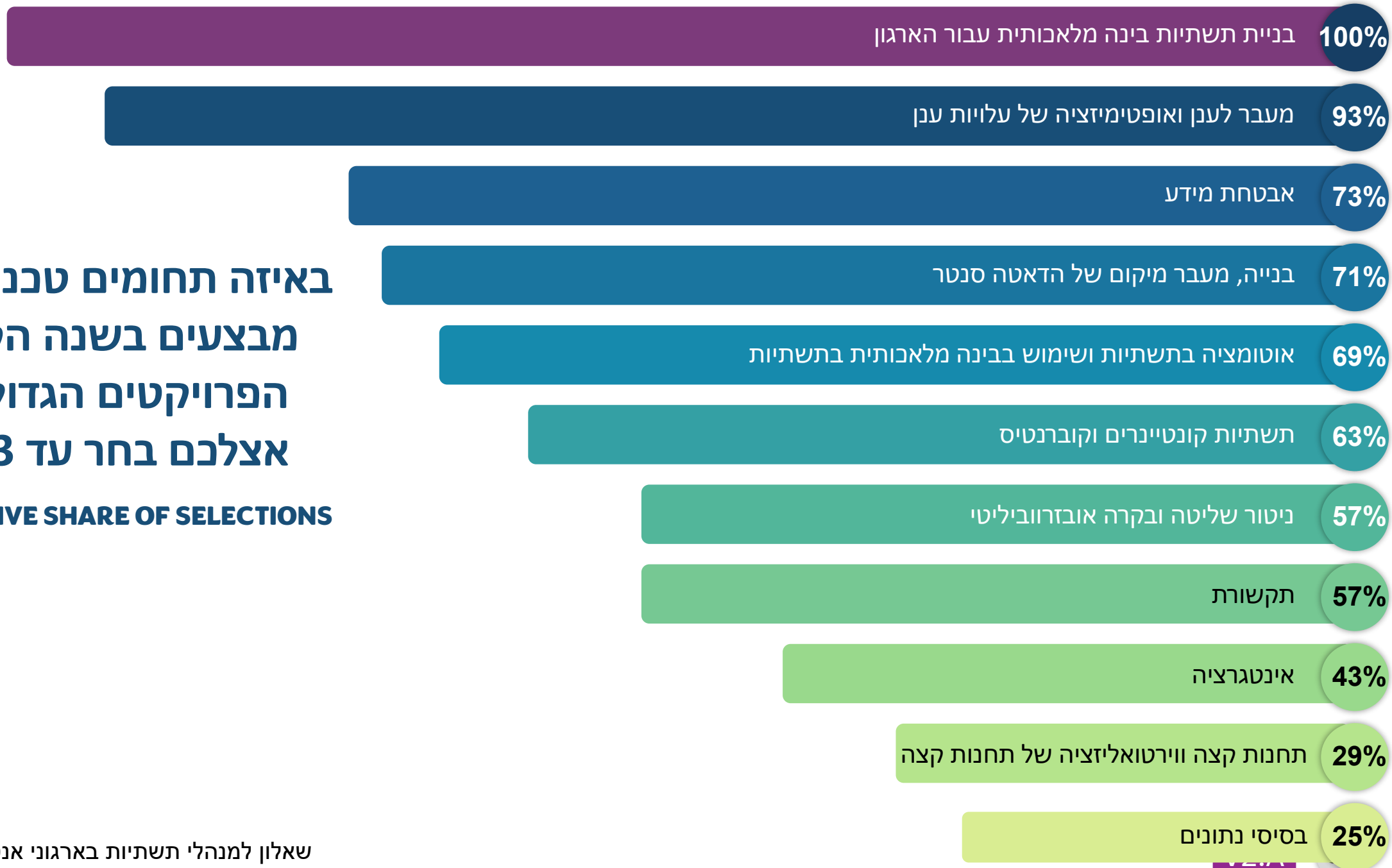


Reut Shefer Bar



GenAI Analyst

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באיזה תחומים טכנולוגיים אתם מבצעים בשנה הקרובה את הפרויקטים הגדולים ביותר אצלכם בחר עד 3 נושאים:

RELATIVE SHARE OF SELECTIONS

מי שקיבל 100% היא הבחירה הגדולה ביותר (לא כל המשתתפים בחרו בה) והשאר לא מסתכמים ל- 100%

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מהם האתגרים הגדולים ביותר שניצבים בפניך היום בחר עד 3:

100%
הטמעה ואימוץ של כלי בינה מלאכותית בתשתיות

86%
עומס תפעולי ותחזוקת מערכות קיימות

76%
מחסור בכוח אדם מקצועי ושימור עובדים

71%
זמינות, יציבות והמשכיות עסקית

49%
מגבלות תקציב, עליית מחירי החומרה והתייעלות כלכלית

43%
פער בין דרישות ההנהלה לבין ההבנה של מורכבות התשתיות בפועל

29%
אתגרי אבטחת מידע, הגנת סייבר

14%
עמידה ברגולציה, תקינה וקומפליינס

12%
עיכובים וקשיים בתהליכי רכש, לוגיסטיקה ומשפט

10%
עמידה בדרישות ובבקשות של פרוייקטי התוכנה

57%
ניהול ומקסום אימוץ ענן היברידי / מולטי-קלאוד

שאלון למנהלי תשתיות בארגוני אנטרפרייז 2026

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באיזה תחומים יש אימוץ של בינה מלאכותית בגוף התשתיות בחר עד 3 תחומים

100%

סיוע כתיבה של קוד תשתיתי – סקריפטים

90%

סיכומי פגישות וסיוע בבניית מצגות

70%

שימוש בבינה מלאכותית לאיתור תקלות ובעיות – הבינה מלאכותית מבצעת ניתוח של קבצי הלוג

30%

שימוש בבינה מלאכותית לאיתור תקלות ובעיות – הבינה מלאכותית מסתכל על תחקירי תקלות, על תאור המערכת, מתחקרת את מערכות השליטה והבקרה

20%

הבינה המלאכותית יוצרת תסריטי בדיקה

10%

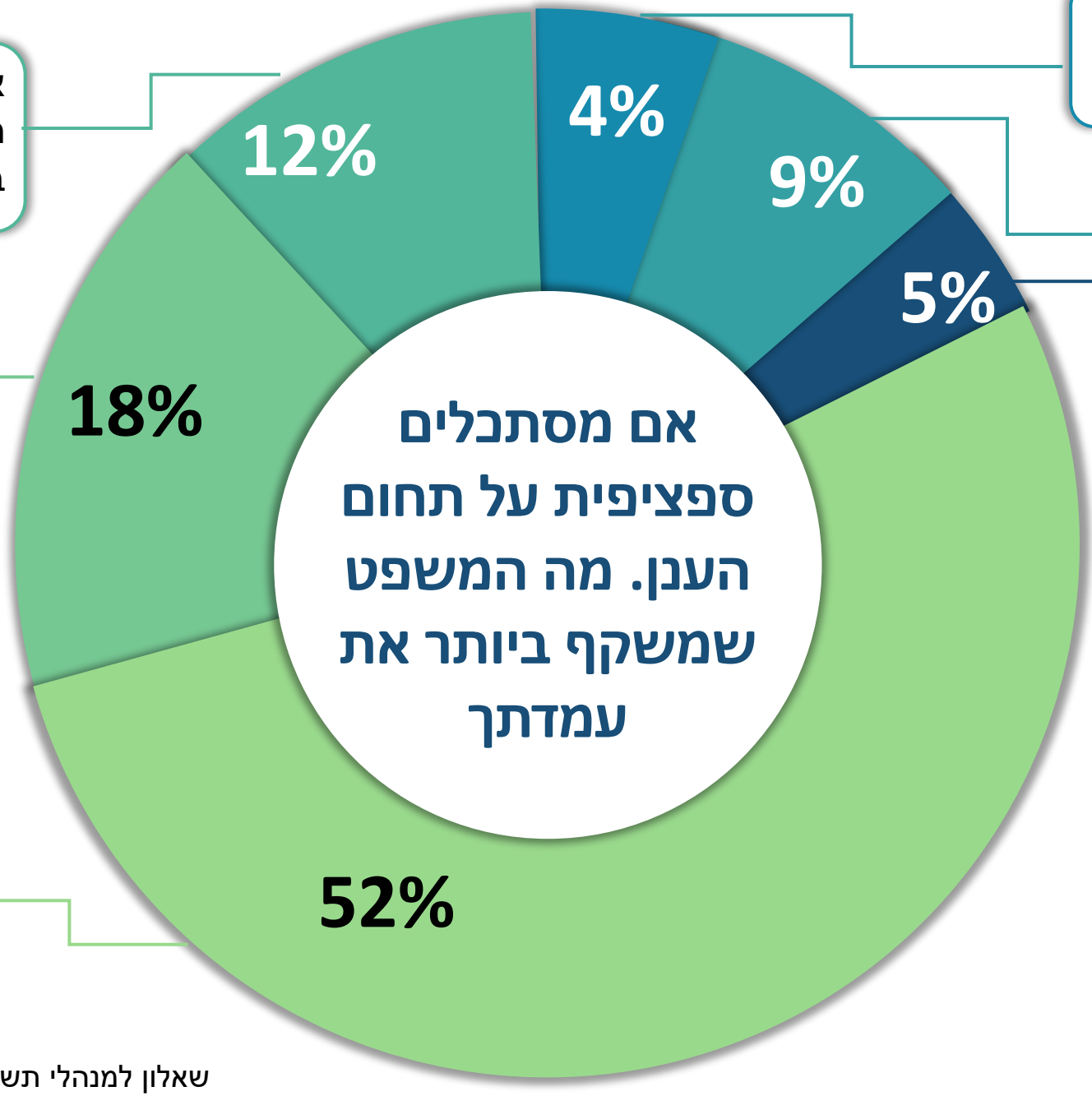
אוטומציה אחרת שהבינה מלאכותית מבצעת בעצמה

0%

הבינה המלאכותית מתכננת ארכיטקטורה בענן או באתר הלקוח וגם יוצרת את הקוד התשתיתי שבונה את הארכיטקטורה

מי שקיבל 100% היא הבחירה הגדולה ביותר (לא כל המשתתפים בחרו בה) המספרים לא מסתכמים ל- 100%

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יש אימוץ ענן נרחב בארגון – אני מרגיש בנוח עם זה.

יש אימוץ ענן בינוני בארגון – זה מתאים כעת לצורכי הארגון ואני מרגיש בנוח עם זה.

אימוץ הענן מתקדם לאט בגלל העלויות הכבדות בענן.

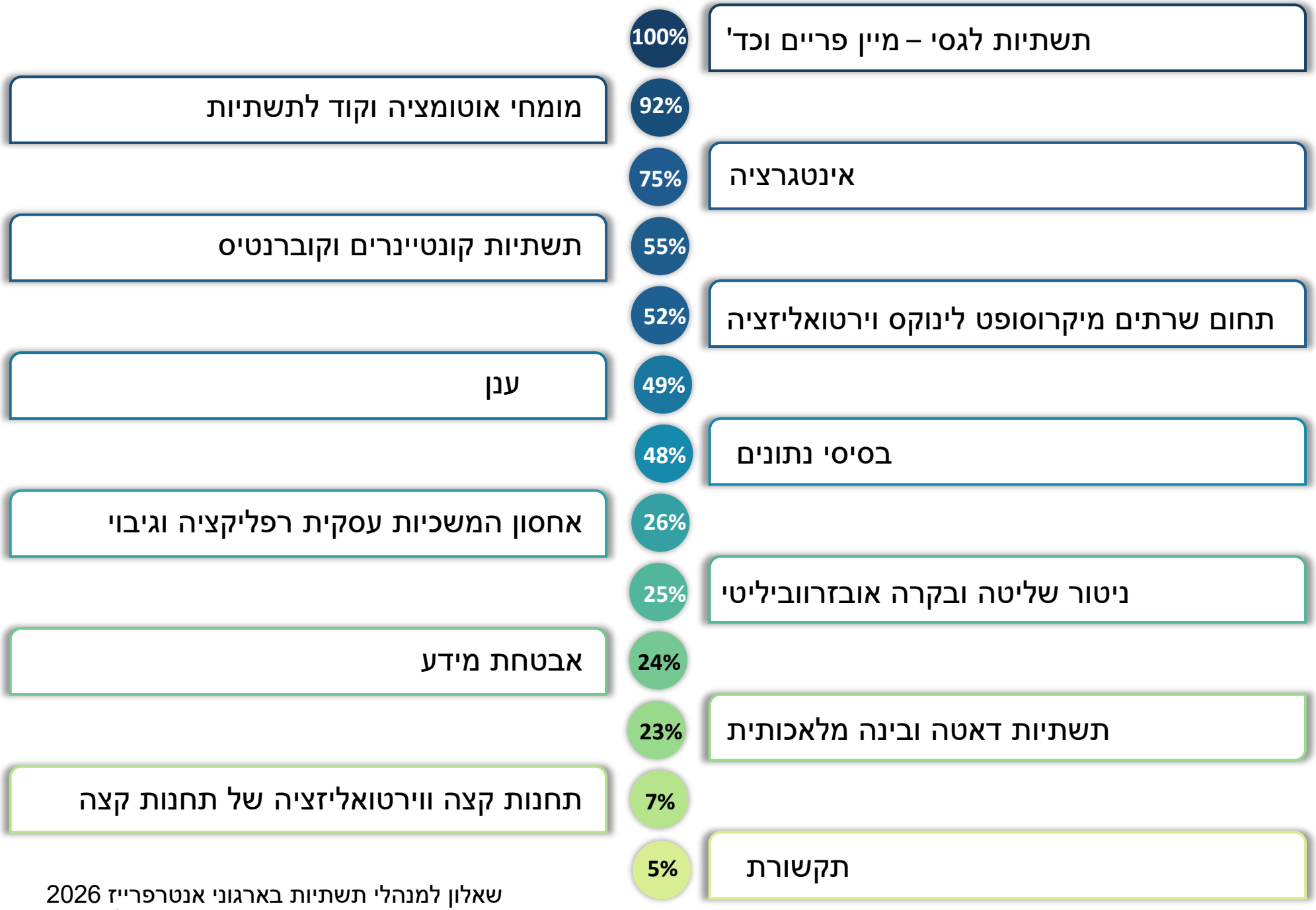
אימוץ הענן מתקדם לאט בגלל המורכבות של עבודה במקביל בענן ובדאטה סנטר

אימוץ הענן מתקדם לאט בגלל מחסור בידע וכ"א

אימוץ הענן מתקדם לאט בגלל סוגיות של אבטחה פרטיות ורגולציה

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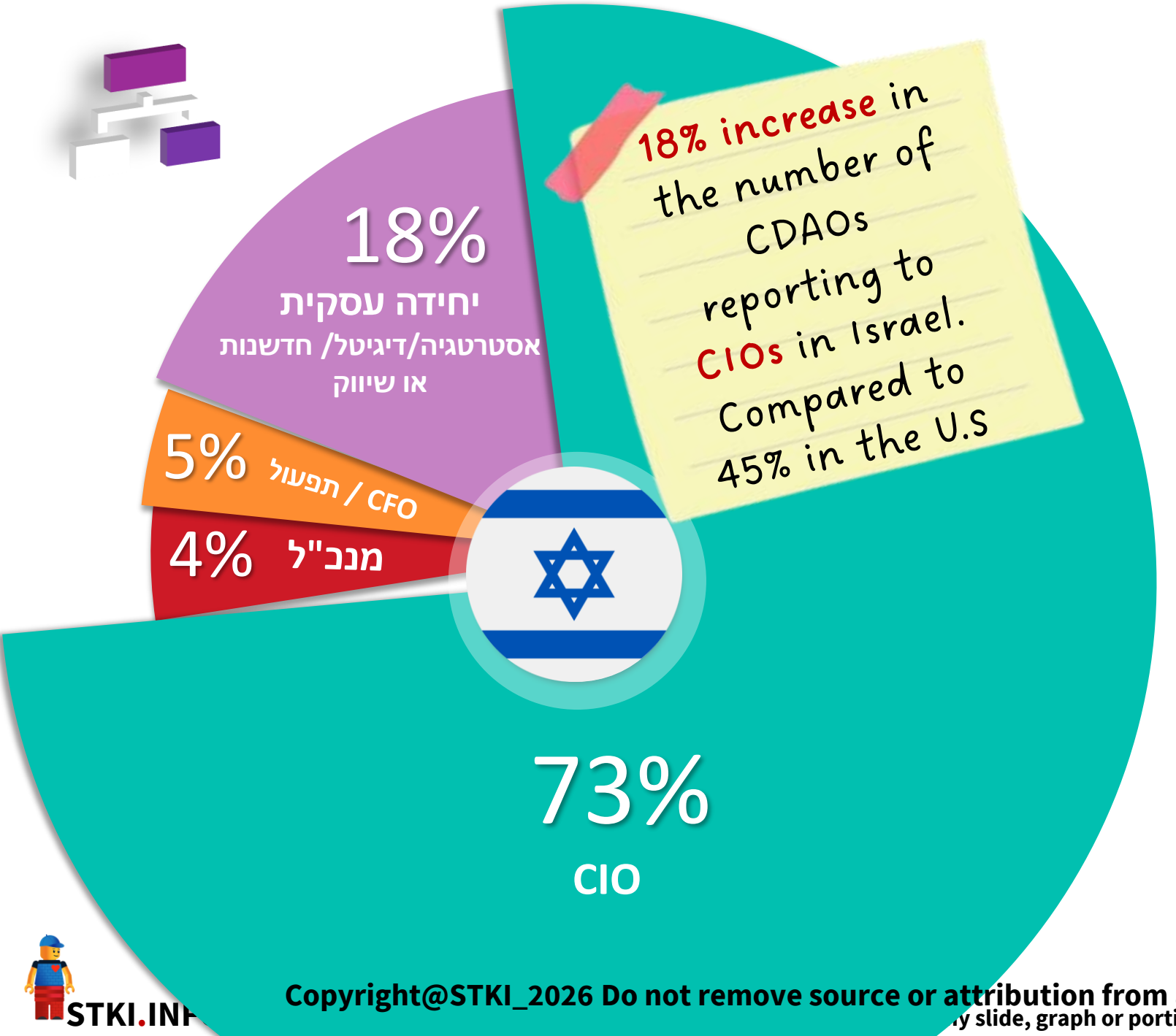
באיזה תחום קיים לדעתך המחסור הגדול ביותר בבנ"א בחר עד 3



מי שקיבל 100% היא הבחירה הגדולה ביותר (לא כל המשתתפים בחרו בה) והשאר לא מסתכמים ל- 100%

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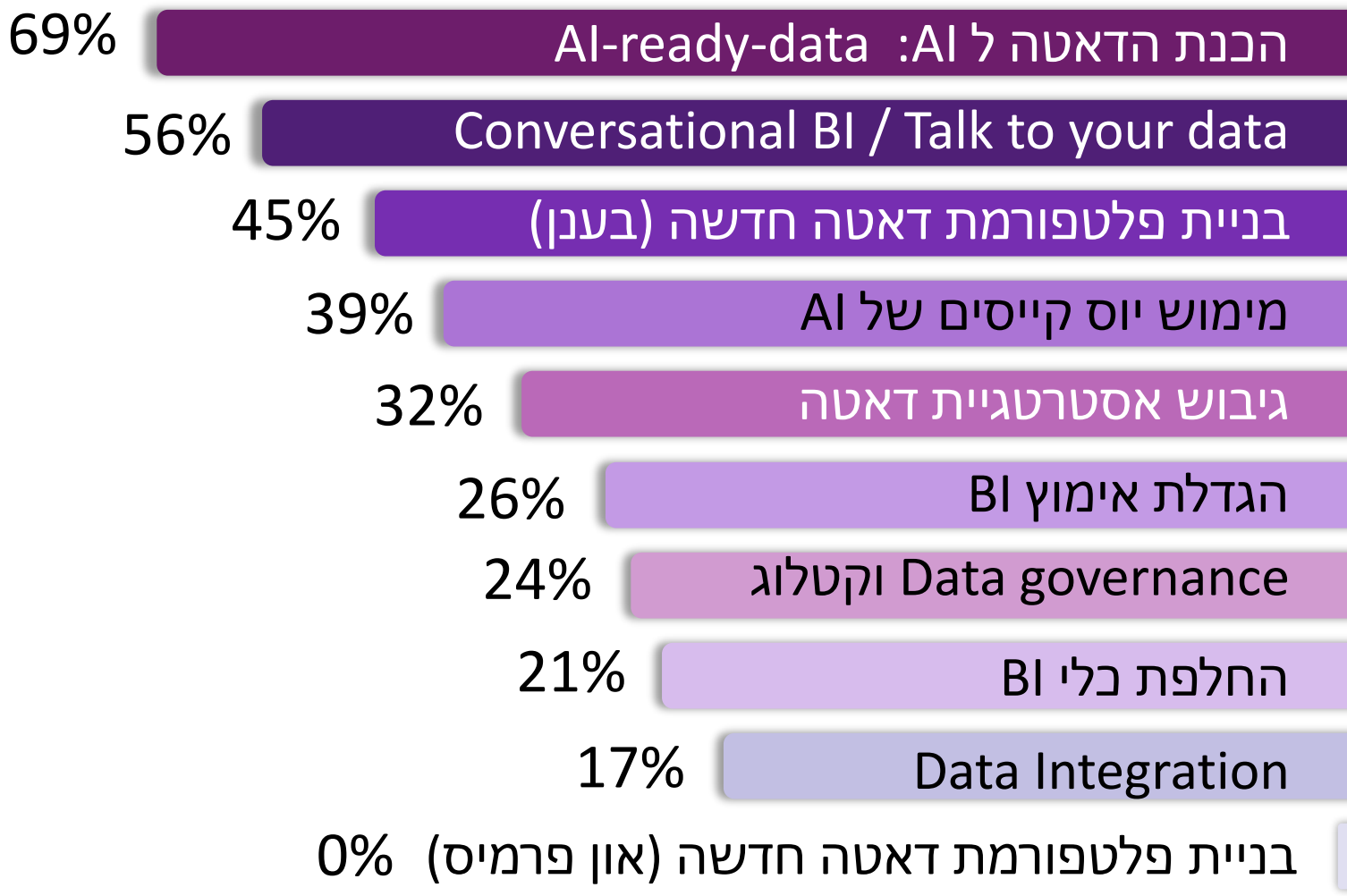
Who does the Israeli CDAO report to?





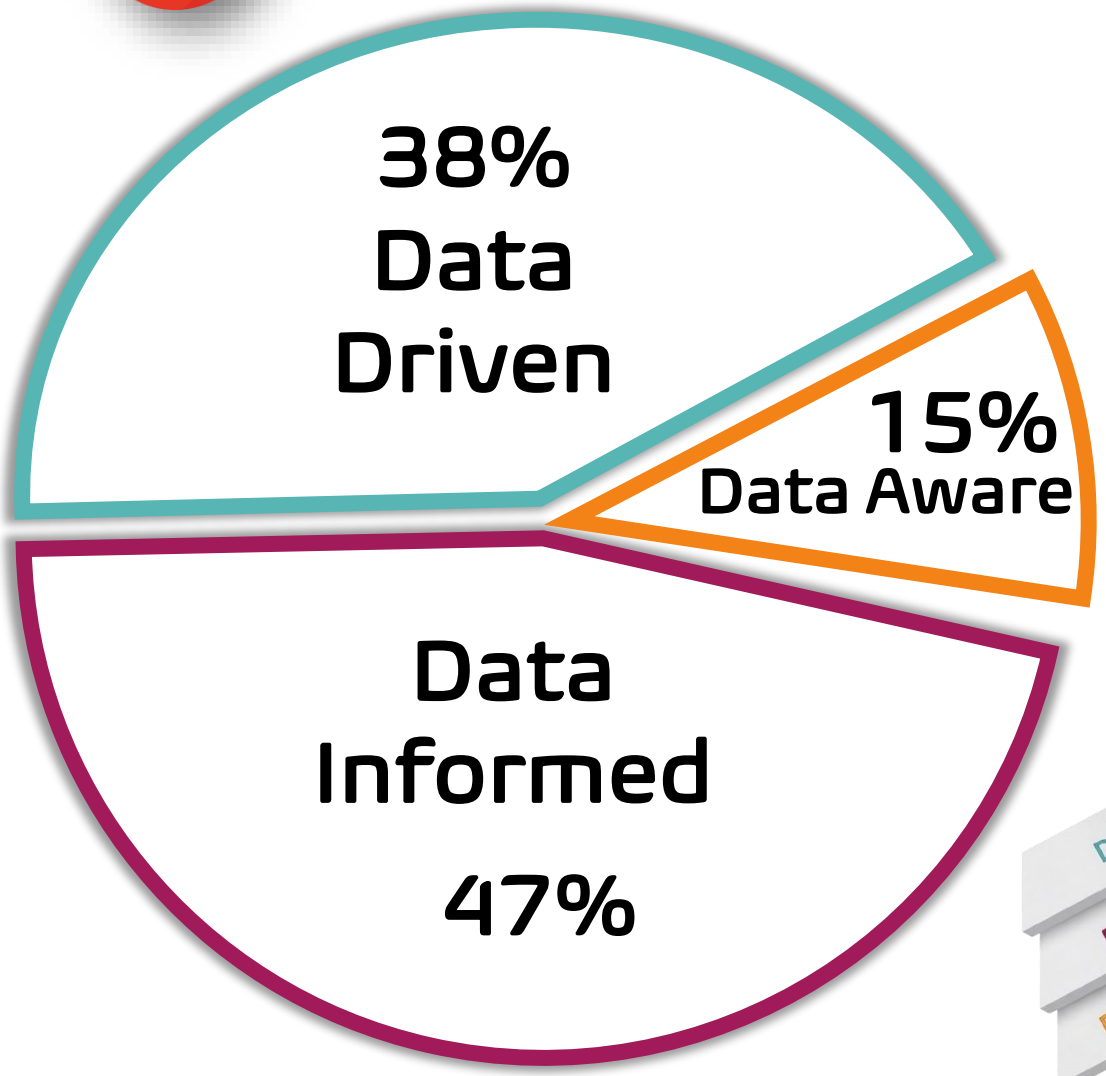
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Most important data initiatives for CDAOs 2026-7

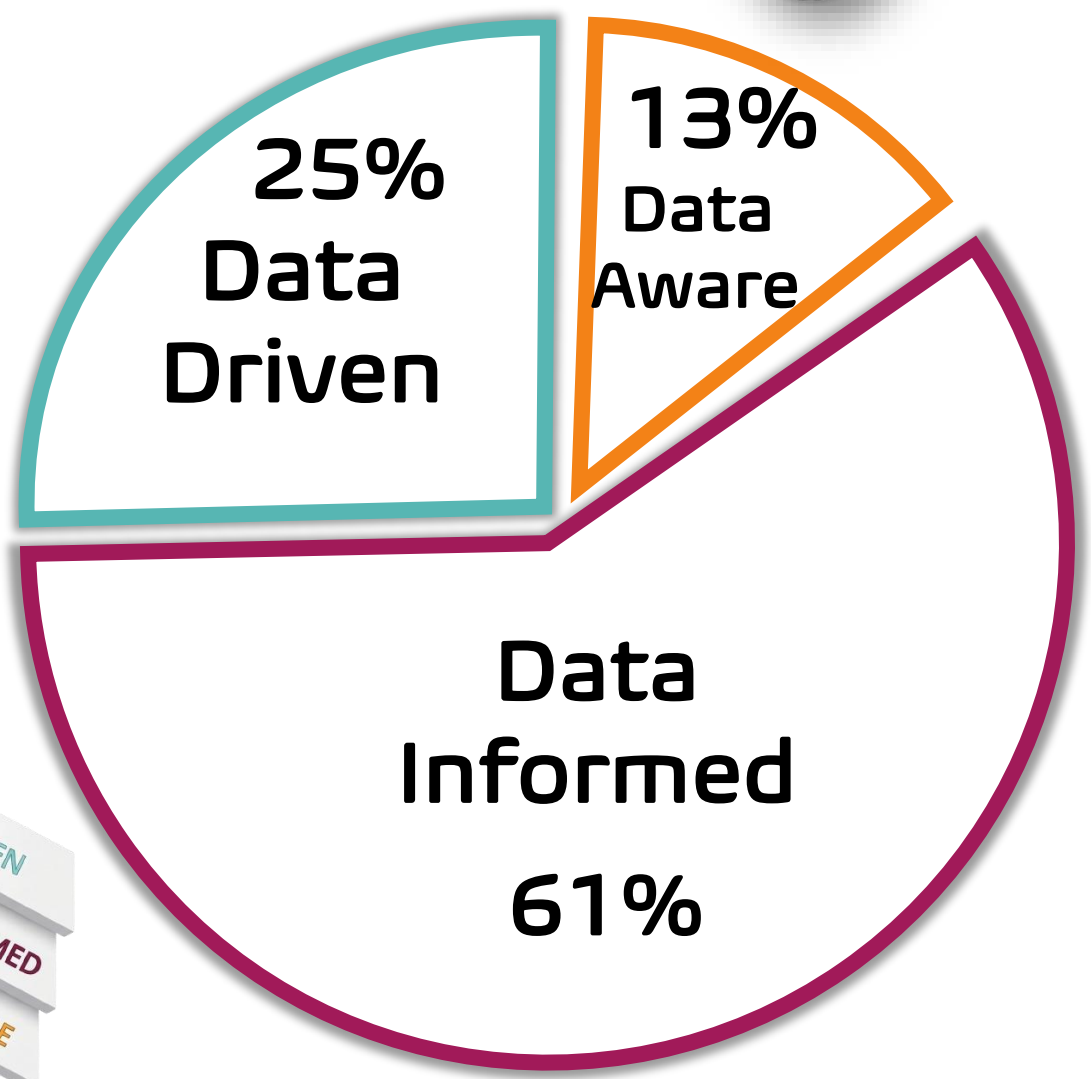


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U.S



Israel





Source: Wavestone's Annual data & analytics study 2025

State of Data in Israel
STKI 2026

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ביזורי
2%

כל יחידה עם הובלת AI משלה. ללא הובלה מרכזית

ריכוזי
29%

גוף מרכזי שמנהל את כל יוזמות ה- AI

כיצד לדעתך האישית AI צריך להיות מובל בארגונים?

פדרטיבי
69%

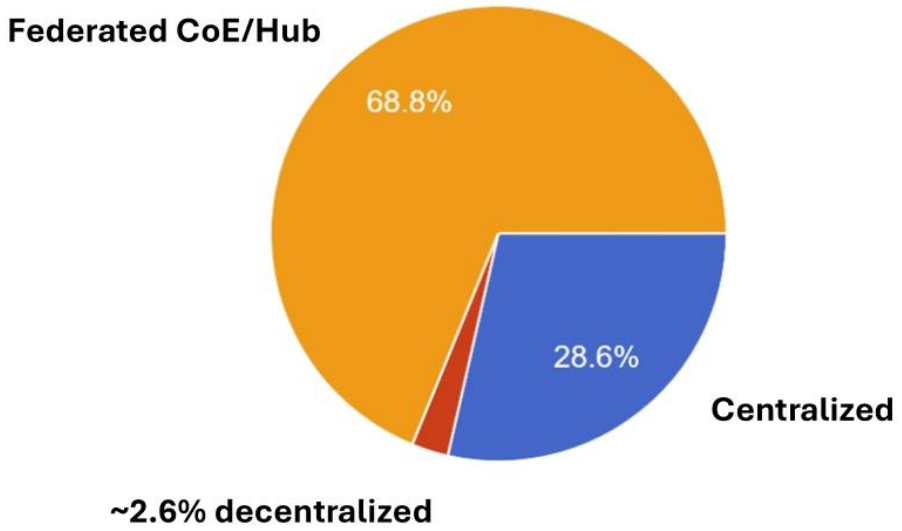
כל יחידה עם מוביל AI משלה, יש גוף מרכזי שמנחה, מתעדף, מייצר שיתוף וסטנדרטיזציה – מודל CoE



The people have spoken

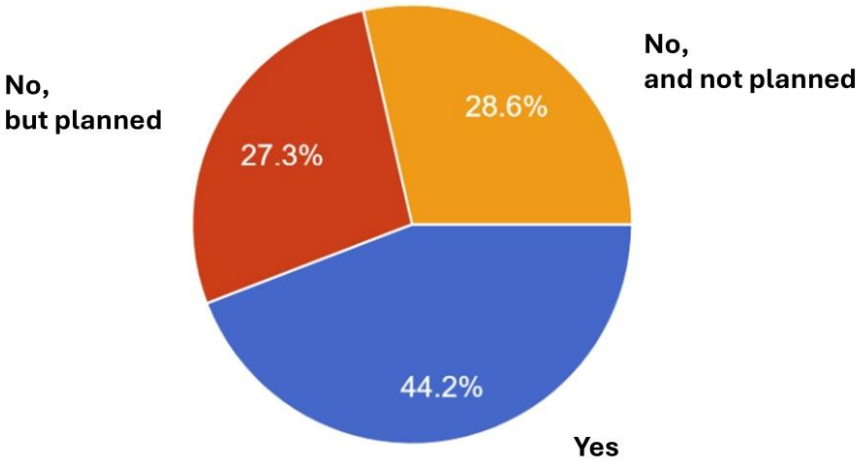
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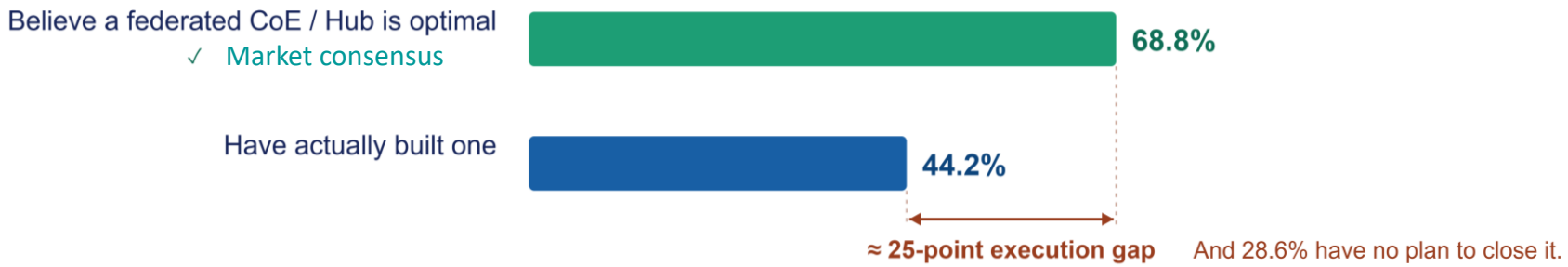
What's (in your opinion) the *optimal* way to lead AI in the org?



Do you have a central AI CoE today?

Source: STKI Agentic survey 2026 (n=77)





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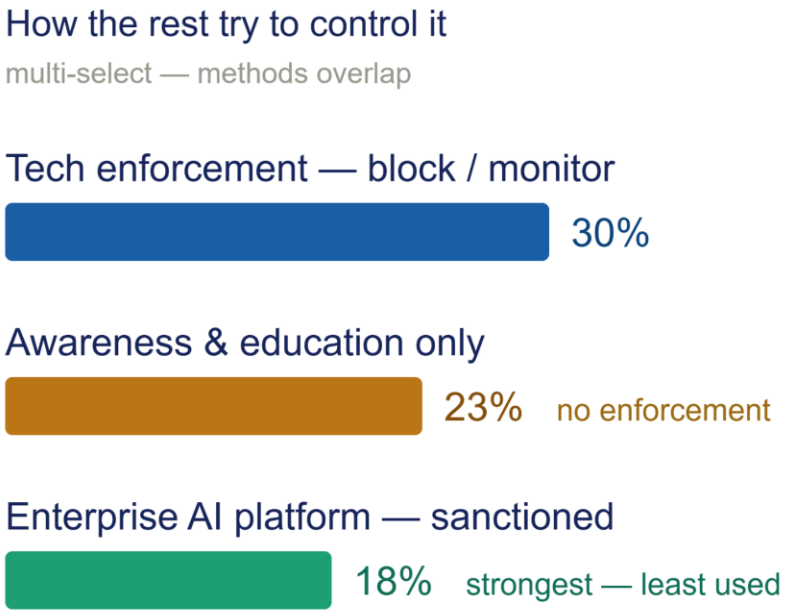
Shadow AI is largely ungoverned

Control over independent AI use · STKI OCIO survey 2026 · n ≈ 44

no guardrails

36%

have no control at all over independent AI use



A third of Israeli enterprises are running agents with zero guardrails.

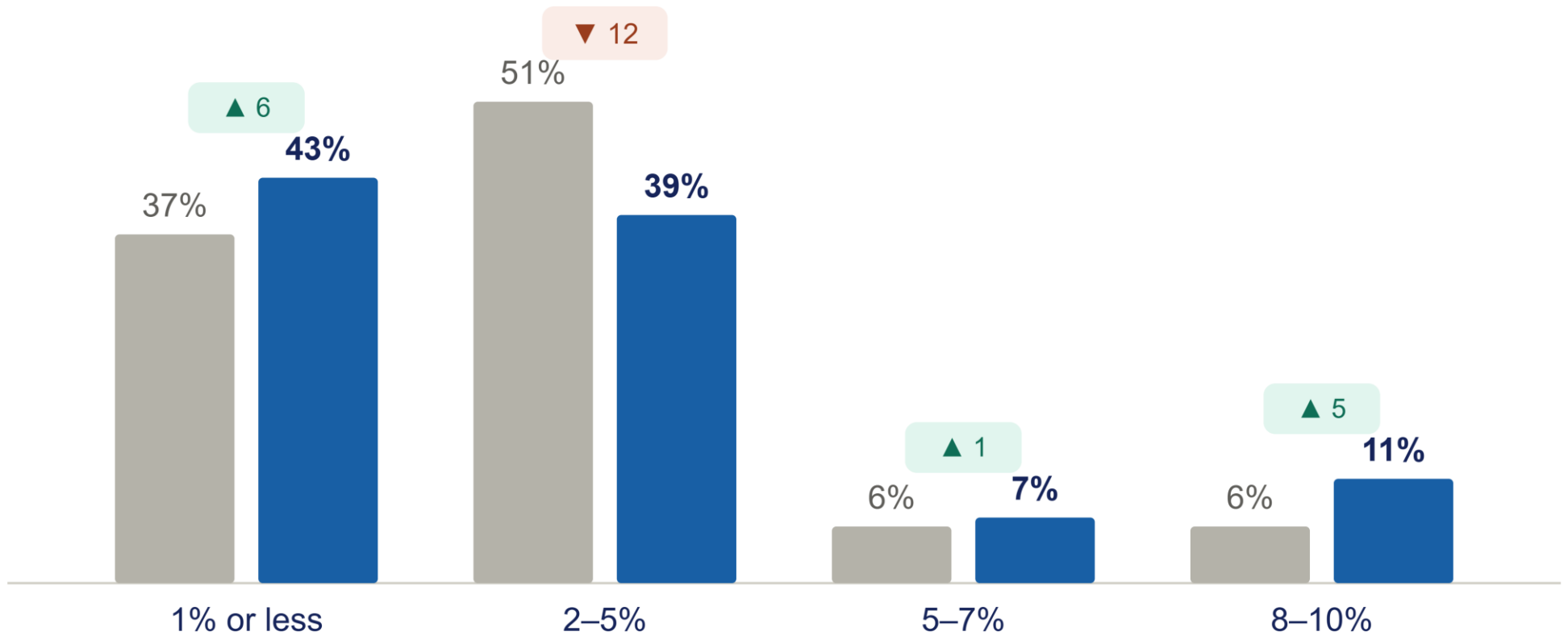
That's a board risk — not a pilot risk.

Source: STKI OCIO survey 2026

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OCIO size: the 2–5% middle is hollowing out

Share of organizations by OCIO size (% of total IT) · STKI 2025 vs 2026



Average held (~3% of IT) — but the 2–5% middle lost 12 points to both ends.

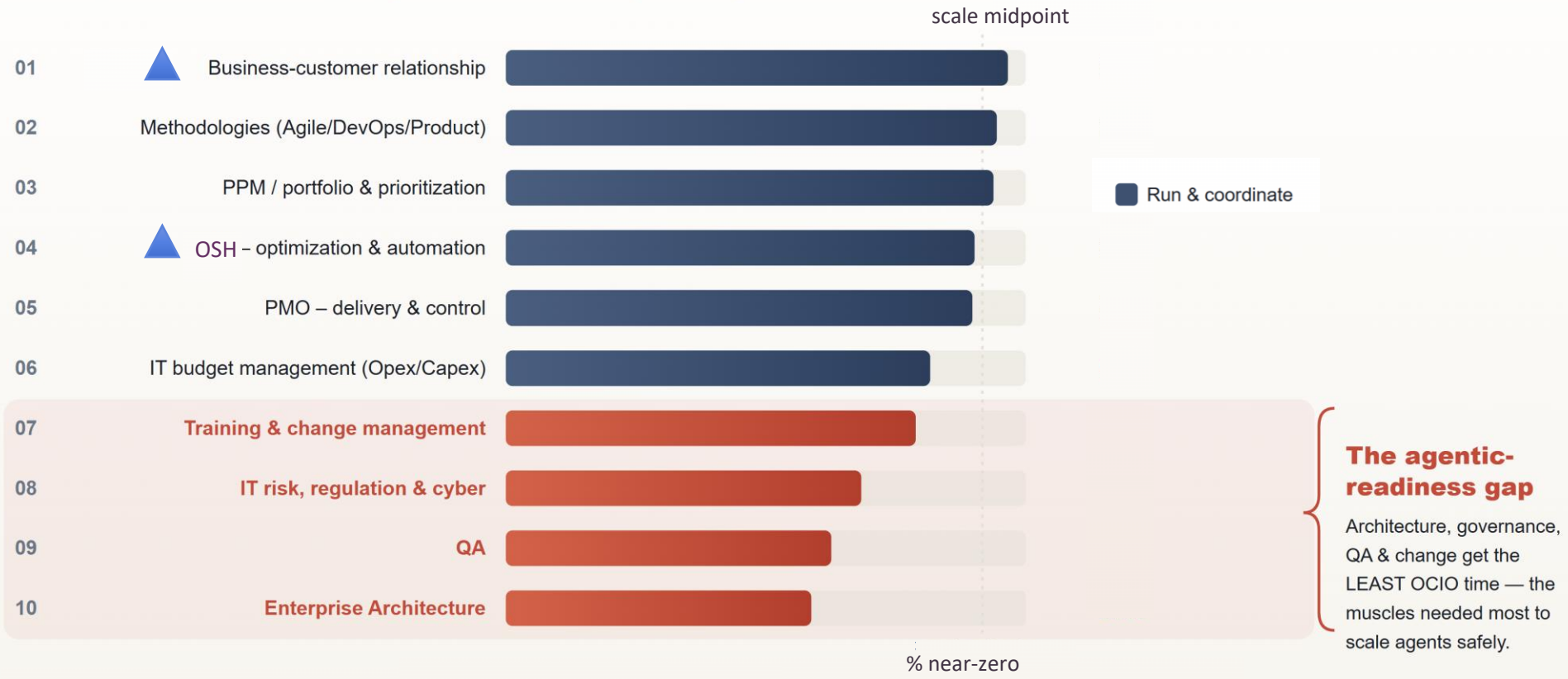
Source: STKI OCIO survey, 2025 & 2026

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STKI · OCIO SURVEY 2026 ·

Where OCIO Time Goes

Time is spread thin across everything — and thinnest exactly where agentic readiness is built.



OCIO Core Capabilities
Methodologies, PPM, PMO, Budget mng

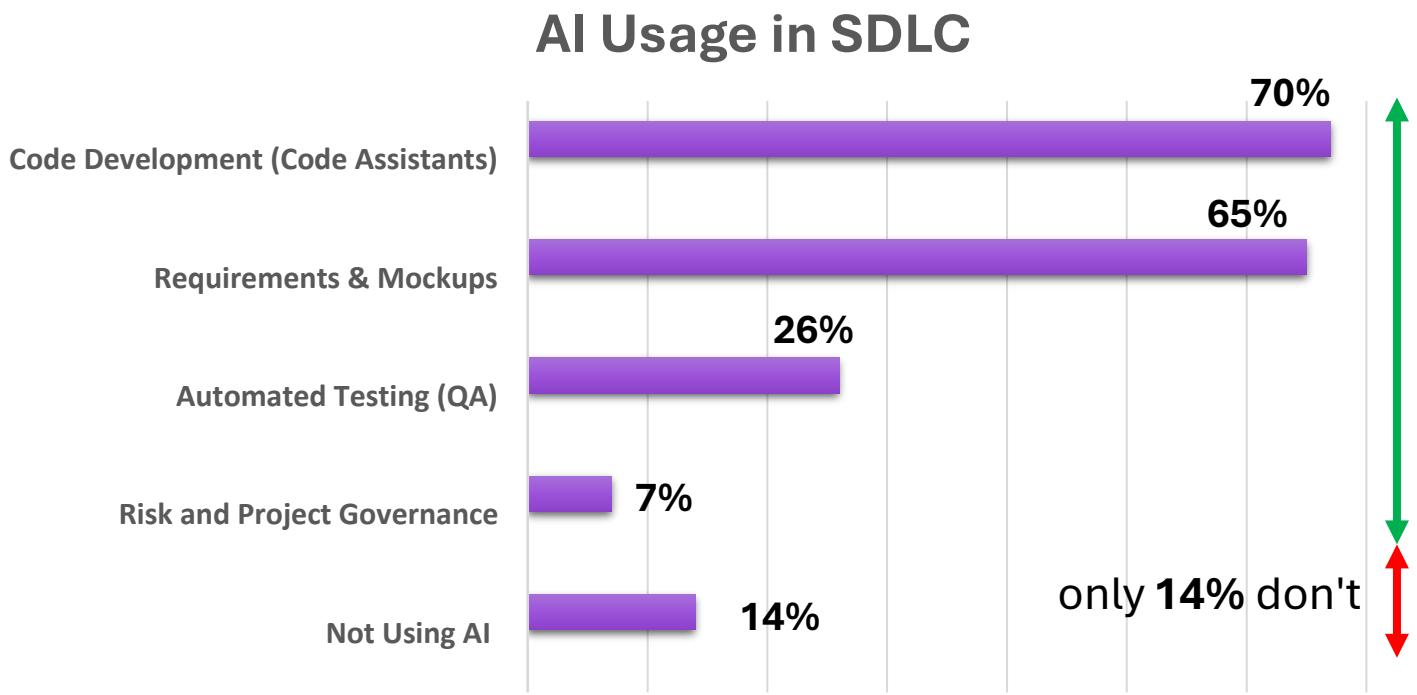
The agentic-readiness gap

Architecture, governance, QA & change get the LEAST OCIO time — the muscles needed most to scale agents safely.

No standard OCIO model yet: the same task is top-priority in some orgs and near-zero in others (e.g., IT budgets - 28% high vs 41% almost none)

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Near-universal AI use in Software Development Life Cycle



86% use AI in SDLC

only **14%** don't

Dev: **70%**
Mockups: **65%**
QA: **only 26%**
Risk Mgmt & Gov: **only 7%**



The next bottleneck in your SDLC is human verification!

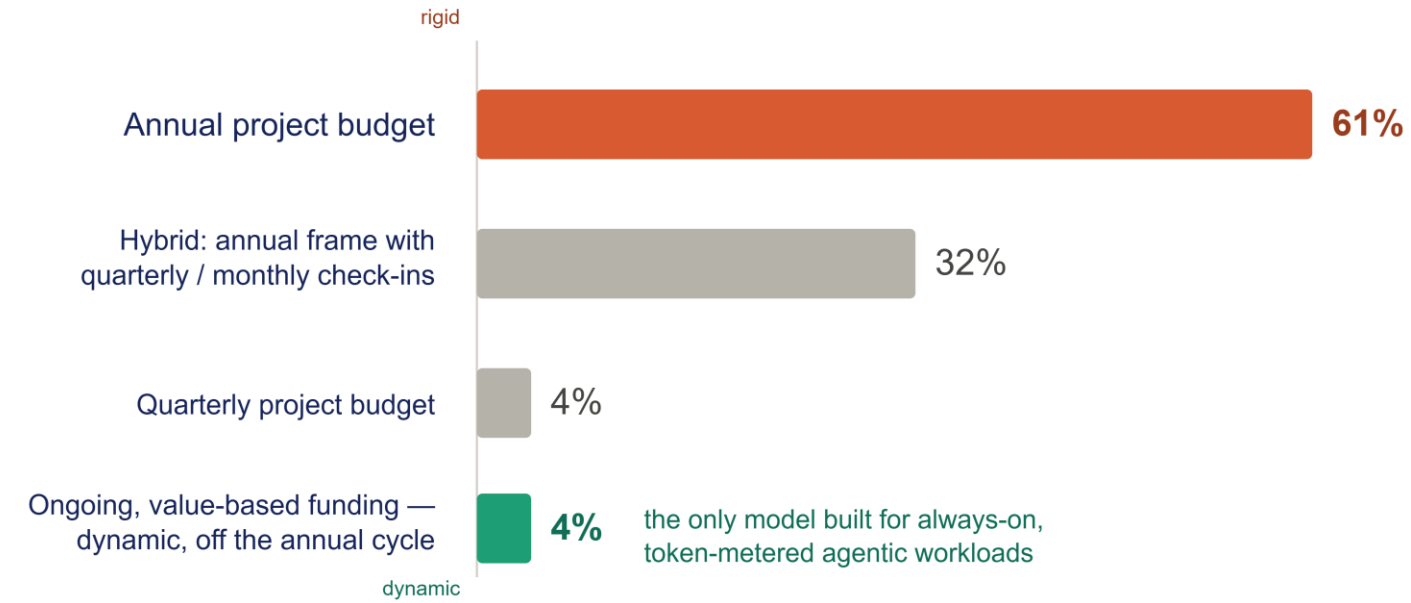
Source: STKI OCIO Survey 2026

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New processes, metrics, roles, operating models - no longer optional

The budget model is built for yesterday

How is IT activity budgeted today? · STKI OCIO survey 2026



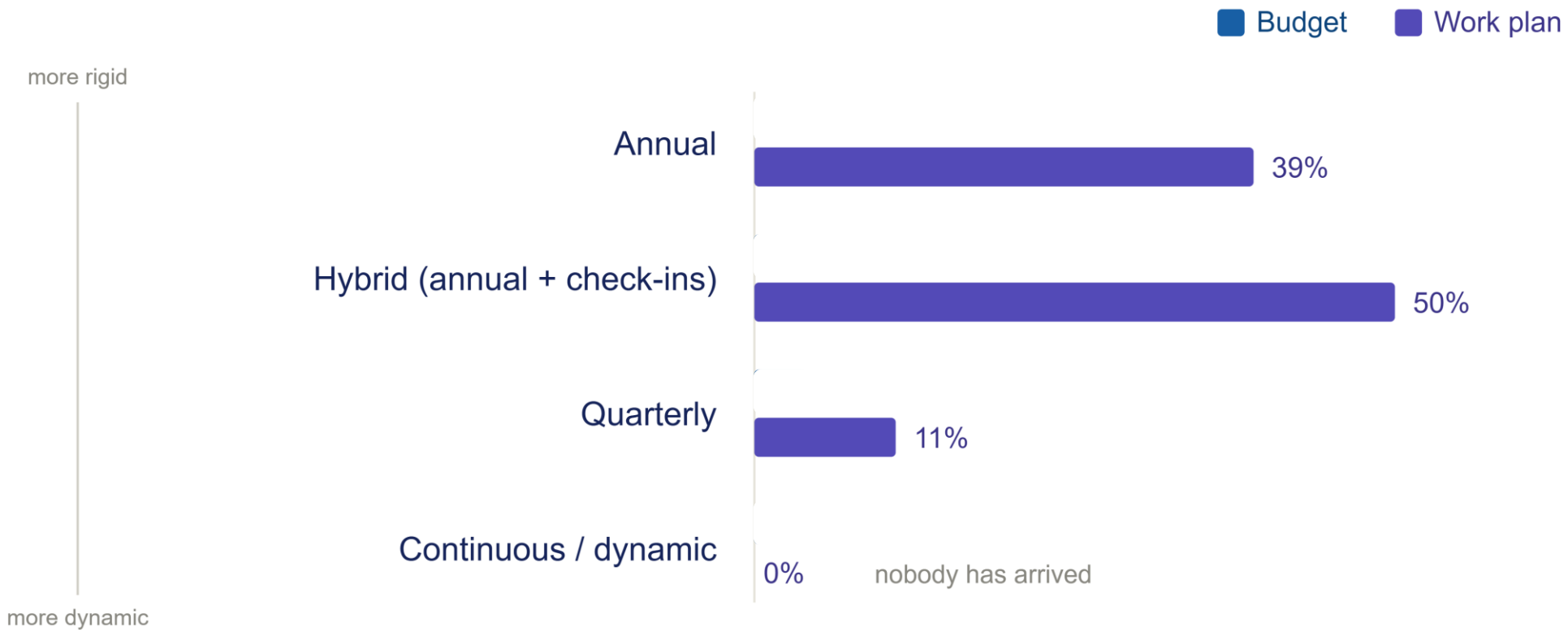
You can't run an always-on, token-metered workload on an annual capex cycle.
That's the structural collision.

Source: STKI OCIO survey 2026

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Plans are bending toward agility — funding isn't

Cadence of IT work plans vs budgets · STKI OCIO survey 2026



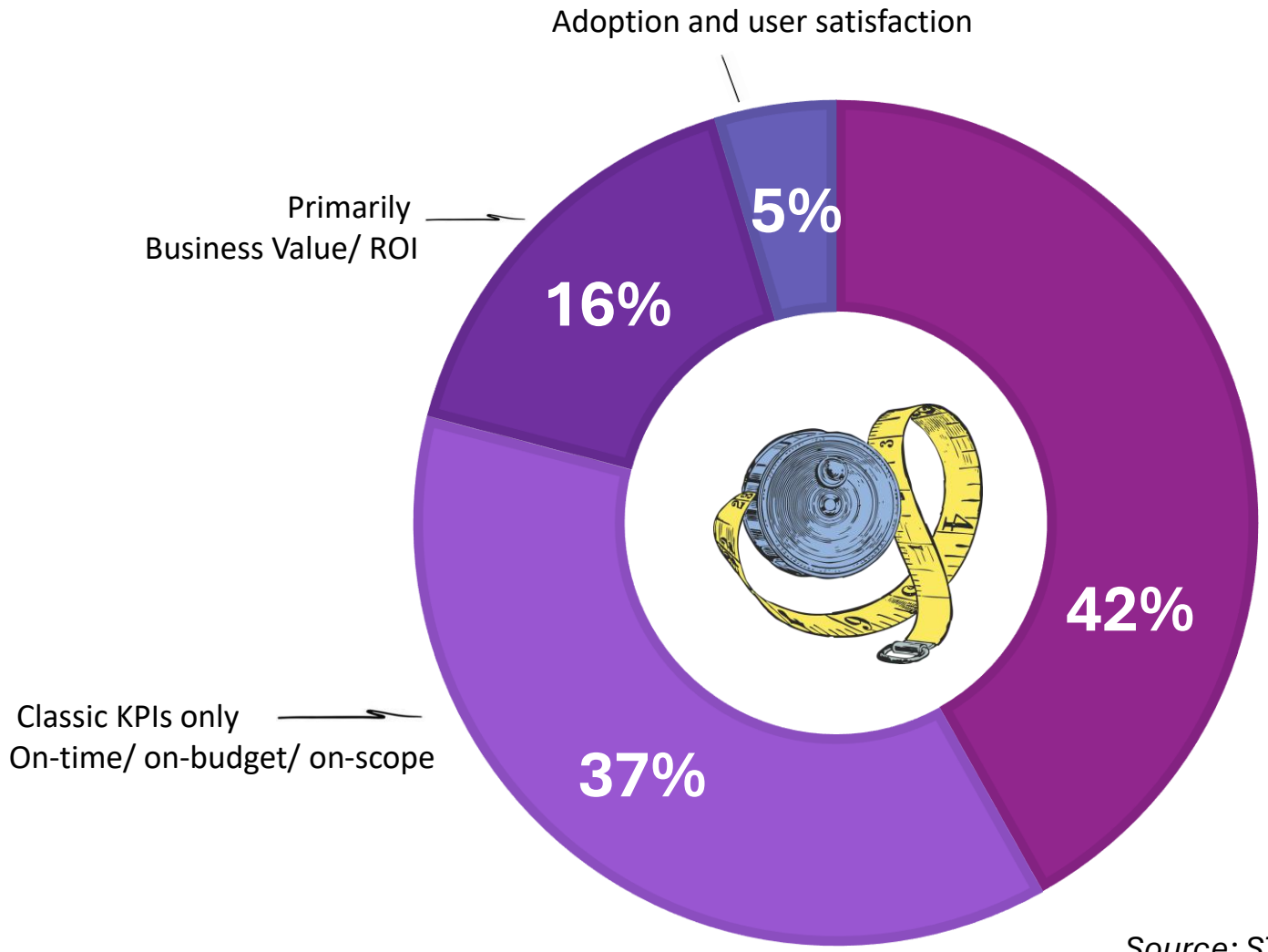
61% already plan with some agility — but just 40% fund with any.

You can re-plan every quarter. You can't re-fund.

Source: STKI OCIO survey 2026

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How AI (or IT) Projects' Success is Measured



79% still measure dynamic, token-metered Agentic products using rigid, legacy KPIs

Source: STKI OCIO Survey 2026

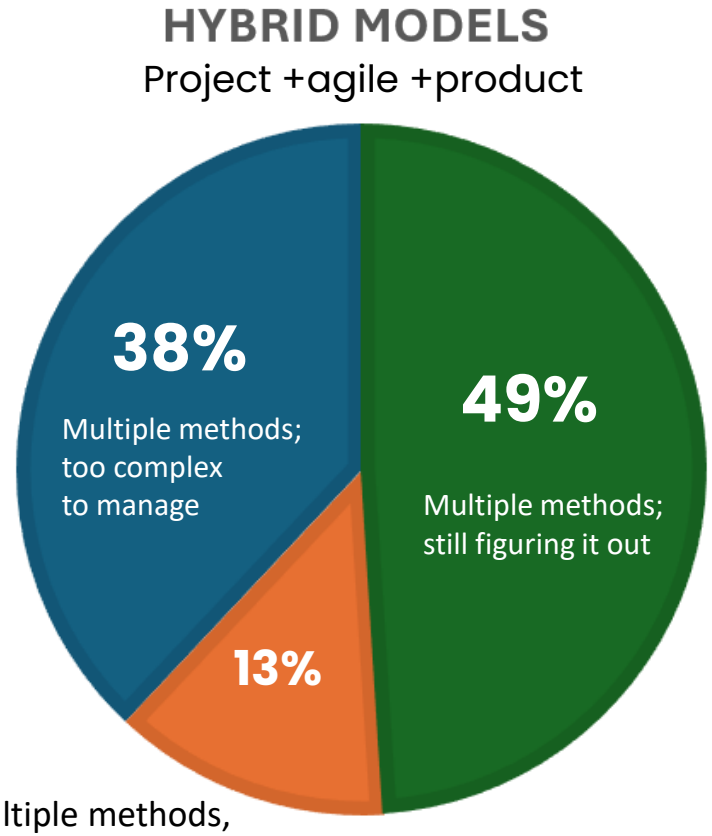
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Where do you stand regarding organizational restructuring and adapting to the new reality?

- **35%** moving to Agile Teams
- **24%** adopting Hybrid models
- **20%** transitioning to true Product Management
- Only **21%** stick to classic project delivery

Everyone's restructuring; nobody's landed it
So we asked: what's actually blocking the shift?



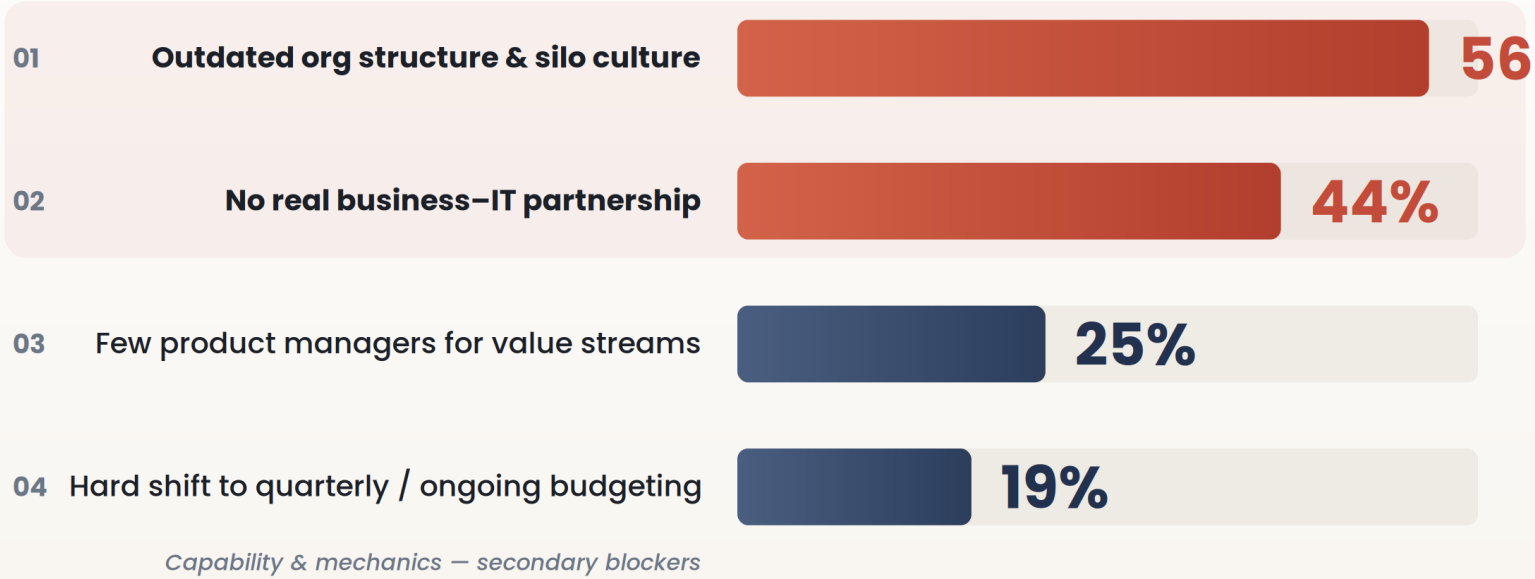
Source: STKI OCIO Survey 2026

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STKI · ISRAELI MARKET PULSE 2026 · SELECT ALL THAT APPLY

What Stalls the Shift to Value Streams

Moving from project management to value-stream management — the main barrier on the path to new development.



It's an org problem, not a tooling one

The two biggest barriers (56% + 44%) are both structural and relational. You can't tool or budget your way past silos and a weak business–IT partnership.

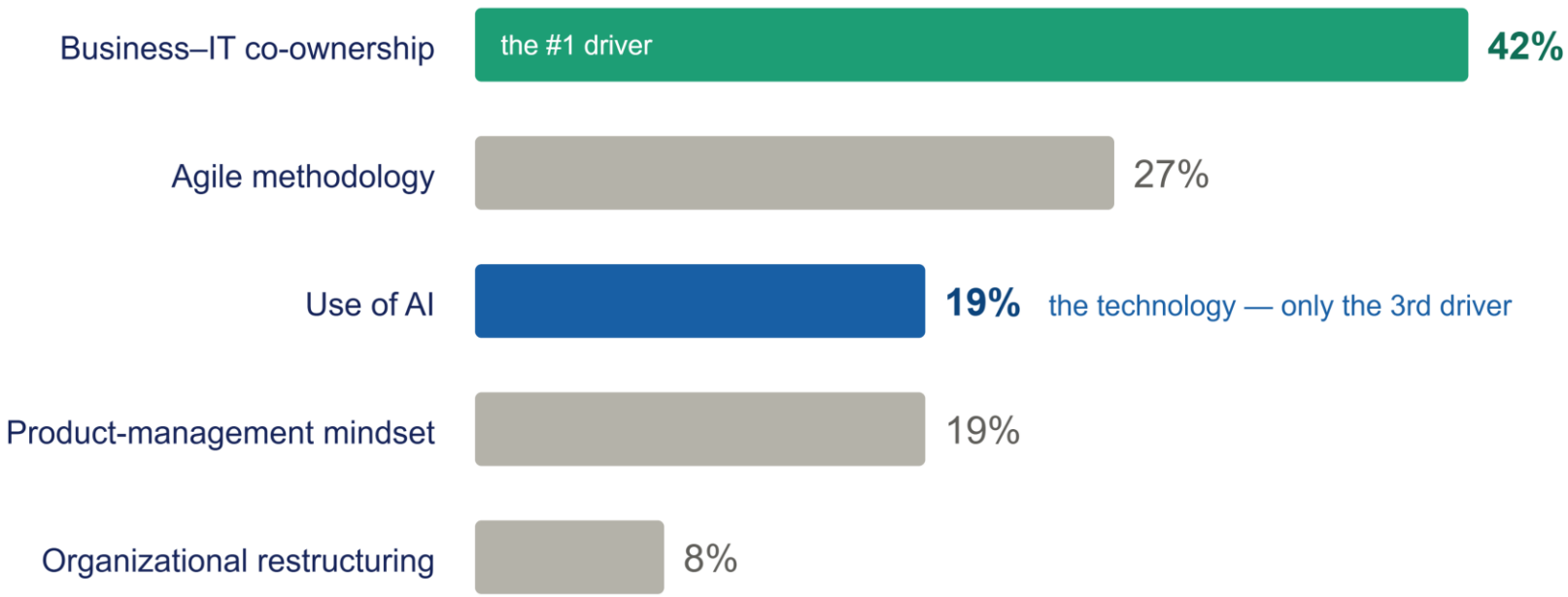
Source: STKI OCIO Survey 2026

Moving from projects to value streams is an operating-model change — fix org design and culture first.

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The biggest delivery gain came from co-ownership — not AI

What drove your biggest Project Delivery improvement this year?



Co-ownership beat AI by more than 2× — the lever was accountability, not tooling.

Source: STKI OCIO survey 2026

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Israel

Number of companies & IT budgets by Industry



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar

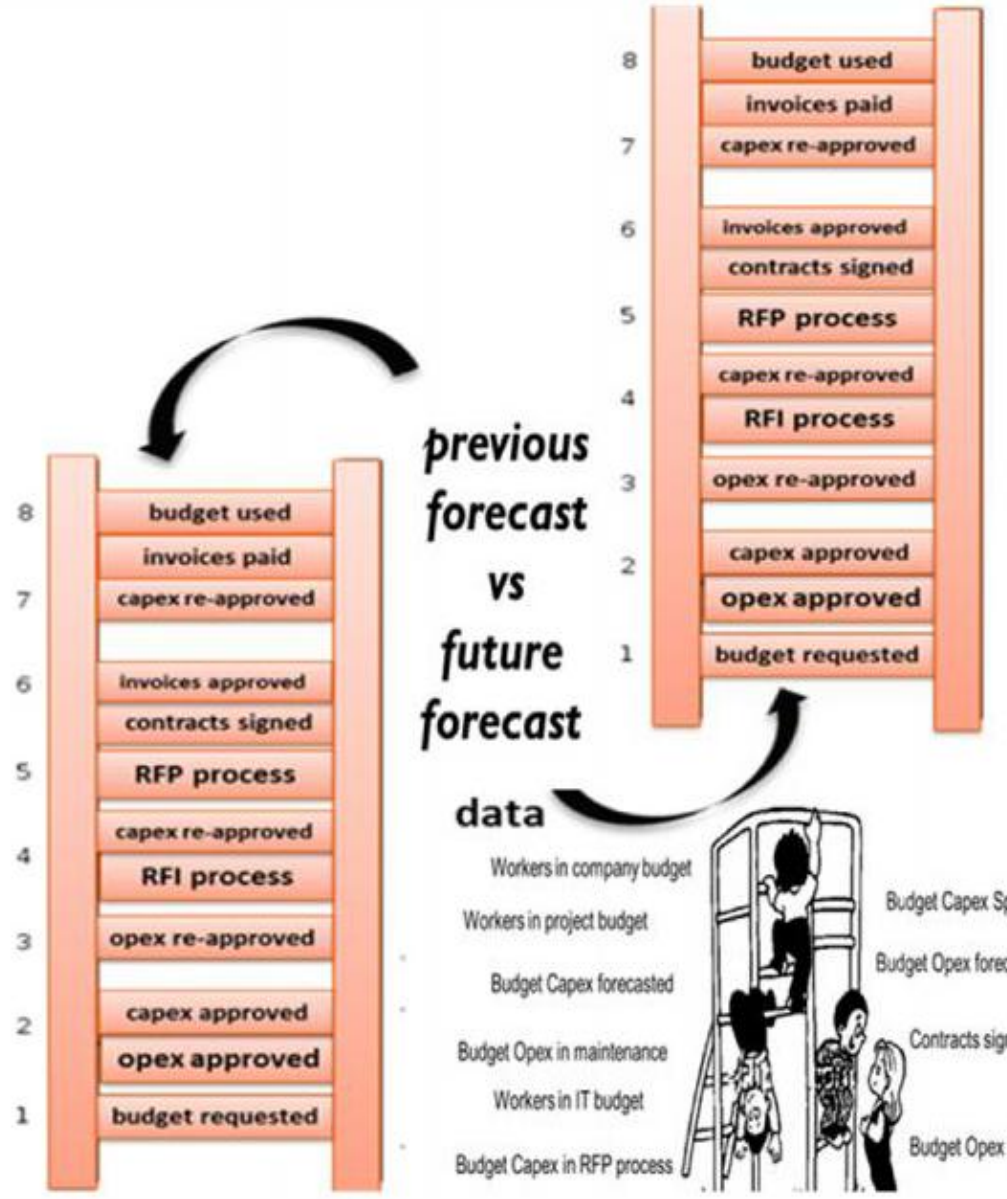


GenAI Analyst

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STKI's analysts interviewed over 250 CIOs & VP Techs in Israel (managing around 70-75% of IT budgets) about:

1. Approved Budgets for 2026 *
2. Budgets include internal budgets and procurement budgets
3. Amount used in Budgets 2022-2025
4. Projects forecasted for 2025-2028
5. IT Department re-organizations
6. Vendors to recommend or not



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

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

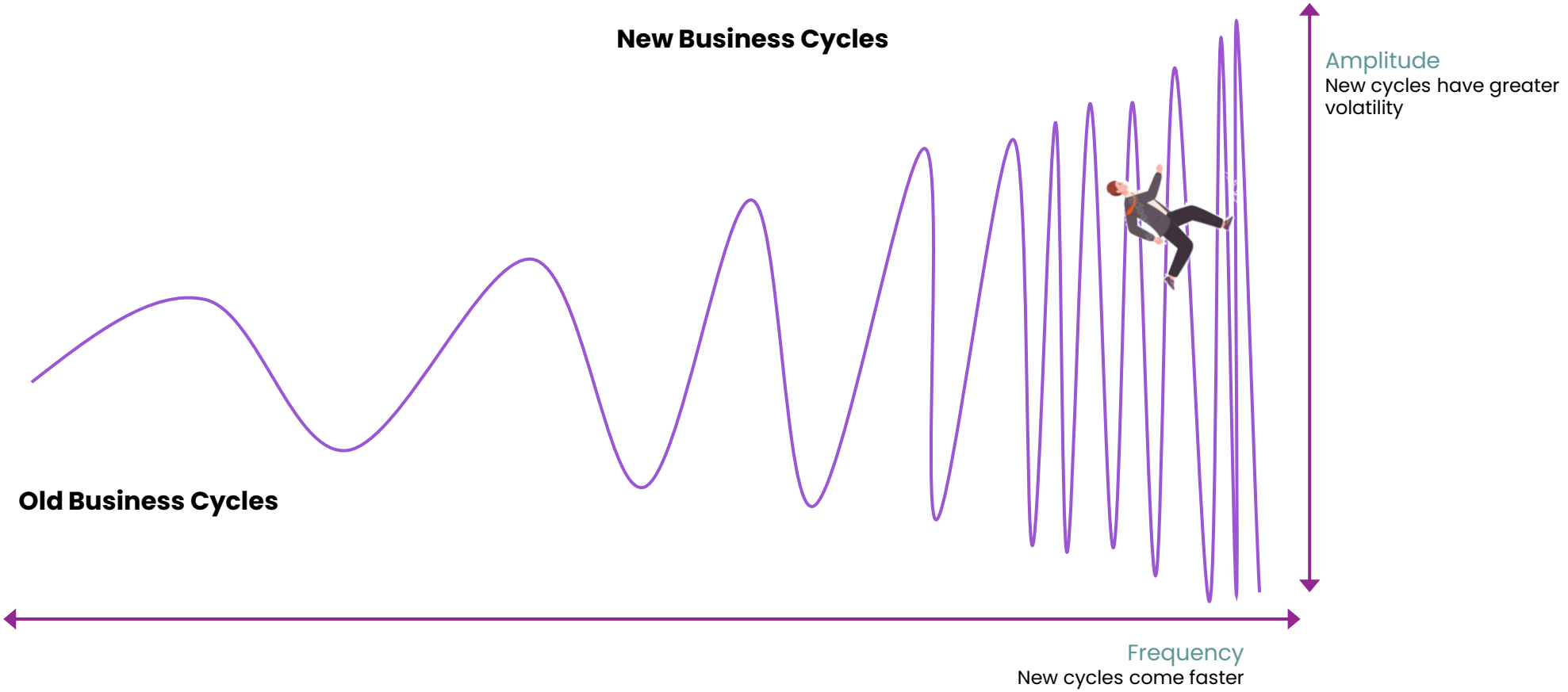
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Number of Active Companies in Israel 2026

2022	2023	2024	2025					
number of companies	number of companies	number of companies	number of employees v2	number of companies registered	number of companies (active)	% of TOTAL. Active companies	subtotals	
1,802	1,786	1,781	251+	1,786	1,294	0.84%	2.13%	
2,757	2,668	2,784	101-250	2,688	1,998	1.29%		
4,955	4,679	4,808	51-100	4,679	3,691	2.38%	2.38%	2.38%
40,270	39,689	40,321	10-50	39,689	30,925	19.97%	19.97%	95.49%
252,571	256,932	255,379	2 to 9	256,932	116,930	75.52%	75.52%	
302,355	305,774	305,073	totals	305,774	154,838	100.00%	totals	
ACCORDING TO BITUACH LEUMI 5/2023	ACCORDING TO BITUACH LEUMI 5/2024	ACCORDING TO BITUACH LEUMI 5/2024	ACCORDING TO BITUACH LEUMI 5/2026					

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THE ISRAELI BUSINESS WORLD IS CHANGING
companies must do more with less (and fast)



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IT Budgets 2022-2026 per industry

IT BUDGETS (cash-out NOT opex/capex accounting)includes *some* other expenses							FORECASTED		
industry	Budgets 2022	change from 2022	Budgets 2023	change from 2023	Budgets 2024	change from 2024	Budgets 2025	change from 2025	Budgets 2026
government	$1,550	6.45%	$1,650	4.24%	$1,720	1.16%	$1,740	-0.57%	$1,730
security	$620	20.97%	$750	18.67%	$890	6.74%	$950	36.84%	$1,300
education	$410	9.76%	$450	2.22%	$460	2.17%	$470	5.32%	$495
health	$435	5.75%	$460	-1.09%	$455	5.49%	$480	8.33%	$520
utilities	$210	4.76%	$220	2.27%	$225	2.22%	$230	6.52%	$245
transport	$550	-3.64%	$530	-3.77%	$510	1.96%	$520	0.96%	$525
banks	$825	3.03%	$850	3.53%	$880	3.98%	$915	14.75%	$1,050
insurance	$420	5.95%	$445	1.12%	$450	5.56%	$475	12.63%	$535
fin other	$485	4.12%	$505	4.95%	$530	9.43%	$580	10.34%	$640
manuf	$750	4.00%	$780	1.92%	$795	3.77%	$825	7.27%	$885
retail	$305	-1.64%	$300	6.67%	$320	3.13%	$330	4.55%	$345
high tech	$1,600	3.13%	$1,650	-6.06%	$1,550	-9.68%	$1,400	25.00%	$1,750
IT local	$182	-5.49%	$172	-6.98%	$160	-1.25%	$158	-5.06%	$150
telecomm	$215	-6.98%	$200	-7.50%	$185	18.92%	$220	18.18%	$260
media	$260	-9.62%	$235	-8.51%	$215	16.28%	$250	4.00%	$260
SMB/SME	$350	8.57%	$380	5.26%	$400	3.75%	$415	4.82%	$435
in M USD	$9,167	4.47%	$9,577	1.75%	$9,745	2.19%	$9,958	11.72%	$11,125
in M USD	Budgets 2022	change from 2022	Budgets 2023	change from 2023	Budgets 2024	change from 2024	Budgets 2025	change from 2025	Budgets 2026
market totals	$8,531.80	2.15%	$8,715.00	5.39%	$9,185.00	5.93%	$9,730.00	12.05%	$10,902.50

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Analysis of forecasted budgets 2025 & 2026

industry	industry	Market size	% total
government	public	$3,640	36.49%
security			
education			
health			
utilities	utilities/ transport	$750	7.52%
transport			
banks	financial	$1,970	19.75%
insurance			
fin other			
manuf	manuf/ retail	$1,155	11.58%
retail			
high tech	high tech/ IT	$1,558	15.62%
IT local vendors			
telecomm	telecomm/ media	$470	4.71%
media			
SMB/SME	SMB	$415	4.16%
in M USD	in M USD	$9,958	100%

industry	industry	Market size	% total
government	public	$4,045	36.36%
security			
education			
health			
utilities	utilities/ transport	$770	6.92%
transport			
banks	financial	$2,225	20.00%
insurance			
fin other			
manuf	manuf/ retail	$1,230	11.06%
retail			
high tech	high tech/ IT	$1,900	17.08%
IT local vendors			
telecomm	telecomm/ media	$520	4.67%
media			
SMB/SME	SMB	$435	3.91%
in M USD	in M USD	$11,125	100%

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OPPORTUNITIES according to IT Budgets

industry	Budgets 2025
government	$1,740
high tech	$1,400
security	$950
banks	$915
manuf	$825
fin other	$580
transport	$520
health	$480
insurance	$475
education	$470
SMB/SME	$415
retail	$330
media	$250
utilities	$230
telecomm	$220
IT local vendors	$158
in M USD	$9,958







Values in Million USD

industry	Budgets 2026
high tech	$1,750
government	$1,730
security	$1,300
banks	$1,050
manuf	$885
fin other	$640
insurance	$535
transport	$525
health	$520
education	$495
SMB/SME	$435
retail	$345
telecomm	$260
media	$260
utilities	$245
IT local vendors	$150
in M USD	$11,125

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STKI IT Market Health Index

Financial Budgets / Public Budgets

Banks
Insurance
Fin Other

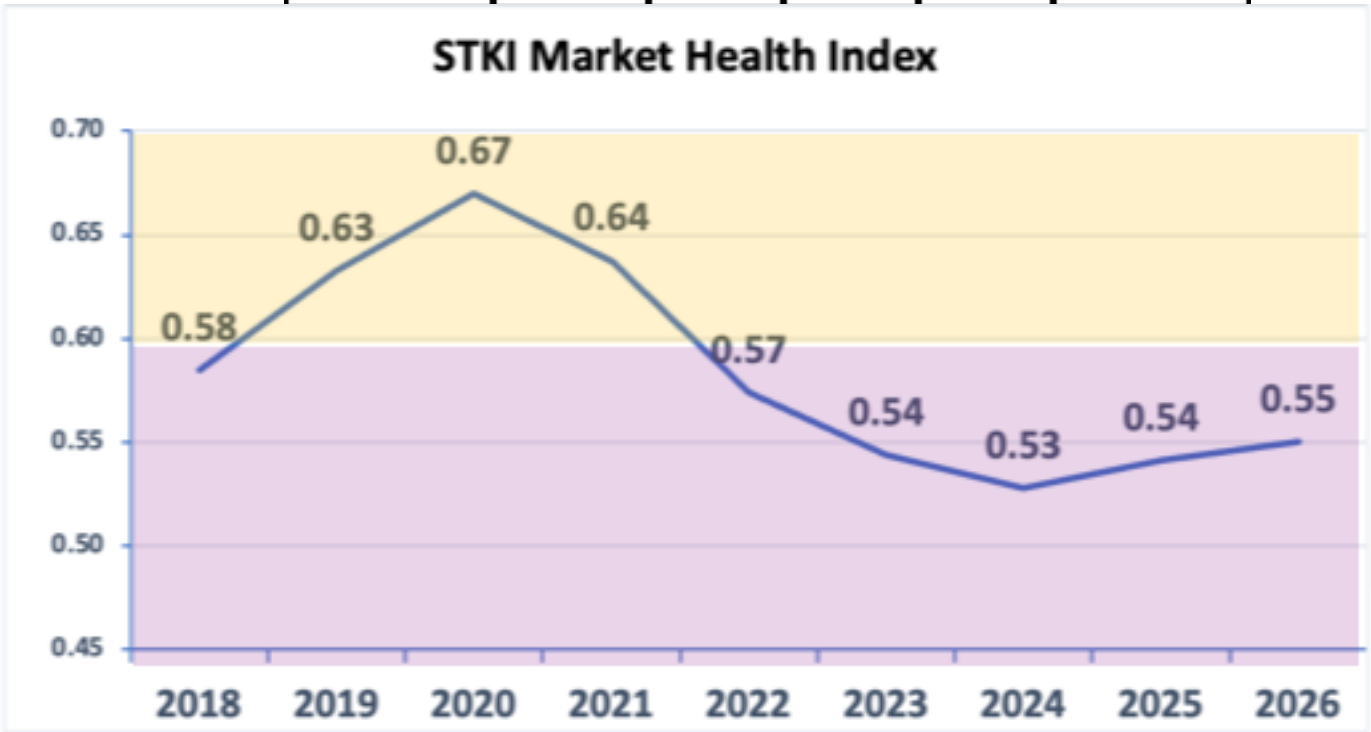
/

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

industry	20022	2023	2024	2025	2026
public	3,015	3,310	3,525	3,640	4,045
finance	1,730	1,800	1,860	1,970	2,225
Market Health Index	0.57	0.54	0.53	0.54	0.55







	2018	2019	2020	2021	2022	2023	2024	2025	2026
Market Health Index	0.58	0.63	0.67	0.64	0.57	0.54	0.53	0.54	0.55

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Percentage of total IT spent 2025

משרד האוצר

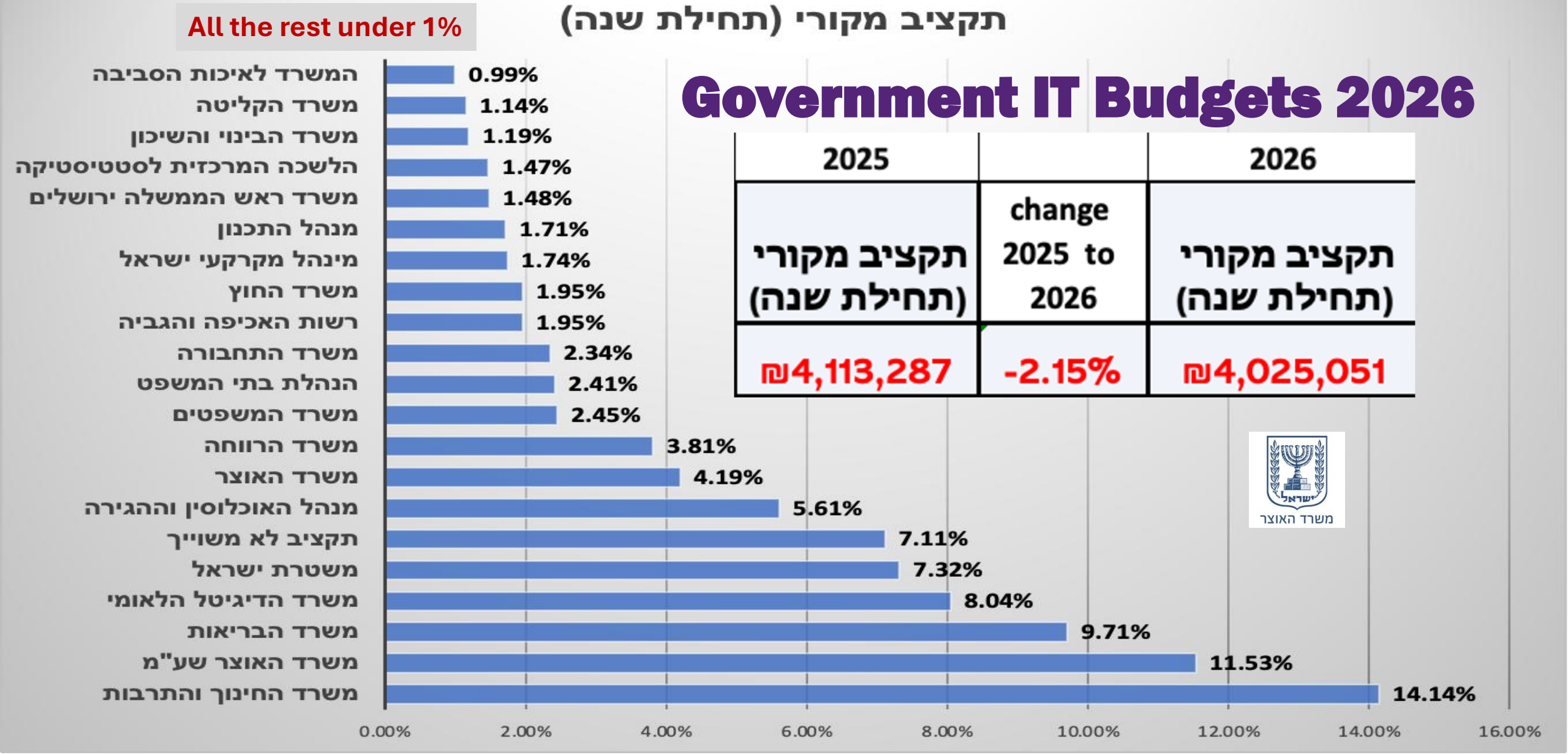
שם חשבות	percentage of 2025 gov spent
משרד החינוך והתרבות	13.95%
משרד האוצר שע"מ	11.96%
משרד הבריאות	10.55%
משרד הדיגיטל הלאומי	9.21%
משרד המשפטים	5.90%
מנהל האוכלוסין וההגירה	4.51%
משרד האוצר	3.94%
משטרת ישראל	3.89%
הנהלת בתי המשפט	3.26%
משרד הרווחה	3.16%
מינהל מקרקעי ישראל	2.66%
משרד החוץ	2.65%
מנהל התכנון	2.34%
רשות האכיפה והגביה	2.13%
משרד ראש הממשלה ירושלים	1.53%
כנסת	1.35%
הלשכה המרכזית לסטטיסטיקה	1.29%
משרד הקליטה	1.26%
משרד הבינוי והשיכון	1.23%
אגף מס הכנסה/הוצאות	1.22%
משרד הכלכלה והתעשיה	1.10%
החשב הכללי	1.09%
משרד הפנים	1.04%
זרוע עבודה - משרד הכלכלה	1.03%
המשרד לאיכות הסביבה	0.90%
רשות שוק ההון	0.86%
אגף המכס/הכנסות	0.71%
שירות התעסוקה	0.69%
משק המים	0.65%
משרד התחבורה	0.58%
משרד מבקר המדינה	0.52%
המשרד לתשתיות לאומיות	0.37%
משרד המדע	0.35%
משרד הדתות	0.32%
נתיב	0.32%
המרכז למיפוי ישראל	0.30%
משרד התקשורת	0.26%
האגף לחינוך התישבותי	0.25%
בתי הדין הרבניים	0.25%
משרד התיירות	0.23%
הרשות להגנת הצרכן ולסחר הוגן	0.08%
המדפיס הממשלתי	0.05%
לשכת הפרסום הממשלתית	0.04%

מזה: עודפים משנה קודמת	תקציב מאושר (סוף שנה)	תקציב מקורי (תחילת שנה)
₪ 1,229,367	₪ 5,636,164	₪ 4,113,287

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Government IT Budgets 2026

All the rest under 1%



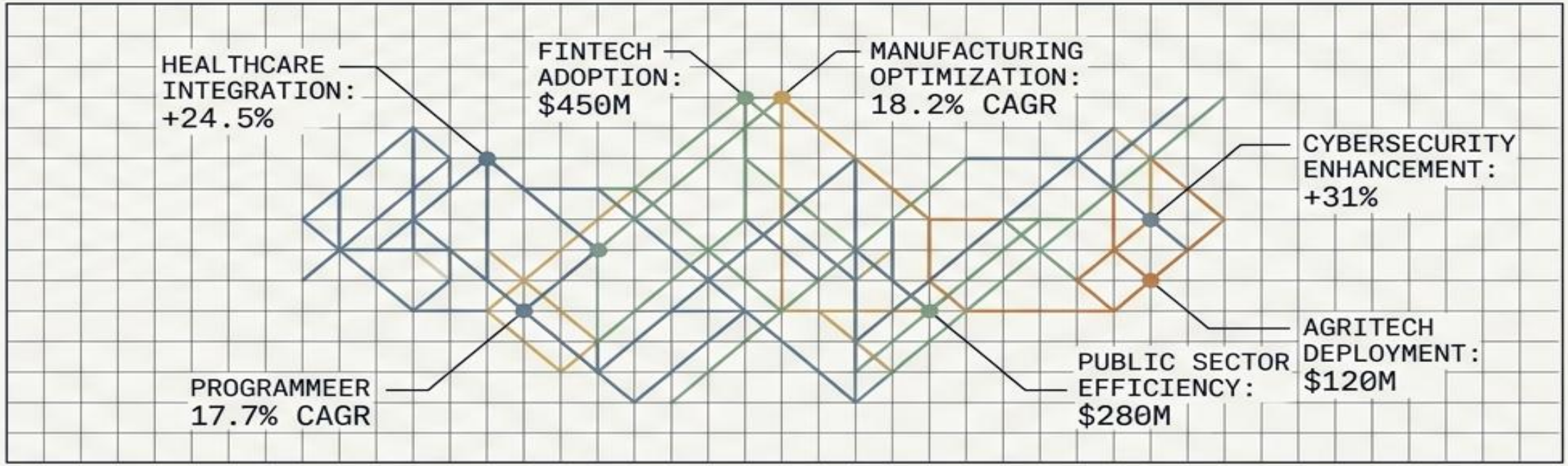
2025		2026
תקציב מקורי (תחילת שנה)	change 2025 to 2026	תקציב מקורי (תחילת שנה)
₪4,113,287	-2.15%	₪4,025,051

משרד האוצר

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ISRAEL AI SPENDING FORECAST 2026-2029

The Enterprise Shift: Reallocating $1.7B in GenAI & Agentic AI Investments



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AI expenditure (added to IT budget)

industry	% of total IT market	% of budget for AI	AI expenditure 2026	% Total AI	industry	industry	% of budget for AI	AI expenditure 2026	% Total AI
government	15%	7.25%	$125.43	12.75%	government	public	7.00%	$283.15	28.84%
defence	11%	10.00%	$130.00	13.21%	defence				
education	4%	4.50%	$22.28	2.26%	education				
health	4%	6.00%	$31.20	3.17%	health				
utilities	2%	5.00%	$12.25	1.24%	utilities	utilities/ transport	5.00%	$38.50	3.92%
transport	4%	8.00%	$42.00	4.27%	transport				
banks	9%	8.30%	$87.15	8.86%	banks	financial	6.10%	$135.73	13.82%
insurance	5%	5.00%	$26.75	2.72%	insurance				
fin other	5%	5.00%	$32.00	3.25%	fin other				
manuf	8%	3.00%	$26.55	2.70%	manuf	manuf/ retail	5.25%	$64.58	6.58%
retail	3%	7.50%	$25.88	2.63%	retail				
high tech	15%	20.00%	$350.00	35.57%	high tech	high tech/ IT	20.00%	$380.00	38.70%
IT local vendors	1%	2.00%	$3.00	0.30%	IT local vendors				
telecomm	2%	5.00%	$13.00	1.32%	telecomm	telecomm/ media	7.00%	$36.40	3.71%
media	2%	5.00%	$13.00	1.32%	media				
SMB/SME	4%	10.00%	$43.50	4.42%	SMB/SME	SMB	10.00%	$43.50	4.43%
in M USD	95%		$983.98	100.00%	in M USD	in M USD		$981.85	100.00%

Values in Million USD



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AI market in ISRAEL from 2026 to 2029 includes projects (genAI & agentic AI) , licenses, tokens and special hardware

industry	% of budget for AI	AI expenditure 2026	% Total AI	change (1+%) from 2026	AI expenditure 2027	% Total AI	change (1+%) from 2027	AI expenditure 2028	% Total AI	change (1+%) from 2028	AI expenditure 2029	% Total AI	industry
public	7.00%	$283.15	28.84%	115.00%	$325.62	28.05%	125.00%	$407.03	29.00%	130.00%	$529.14	30.52%	public
utilities/ transport	5.00%	$38.50	3.92%	108.00%	$41.58	3.58%	110.00%	$45.74	3.26%	120.00%	$54.89	3.17%	utilities/ transport
financial	6.10%	$135.73	13.82%	125.00%	$169.66	14.61%	130.00%	$220.55	15.71%	150.00%	$330.83	19.08%	financial
manuf/ retail	5.25%	$64.58	6.58%	130.00%	$83.95	7.23%	125.00%	$104.93	7.48%	115.00%	$120.67	6.96%	manuf/ retail
high tech/ IT	20.00%	$380.00	38.70%	115.00%	$437.00	37.64%	115.00%	$502.55	35.80%	110.00%	$552.81	31.89%	high tech/ IT
telecomm/ media	7.00%	$36.40	3.71%	110.00%	$40.04	3.45%	110.00%	$44.04	3.14%	115.00%	$50.65	2.92%	telecomm/ media
SMB	10.00%	$43.50	4.43%	145.00%	$63.08	5.43%	125.00%	$78.84	5.62%	120.00%	$94.61	5.46%	SMB
in M USD		$982			$1,161			$1,404			$1,734		in M USD

Values in Million USD

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Israel's AI Growth: 2026–2029 Market Projections

A visual projection of financial growth and industry-specific expenditure in Israel's AI market.

2026
$984M

2027: **$1,161M**

2028: **$1,404M**

2029
76%
Market Growth by 2029
$1.73 Billion

Accelerating Year-over-Year Investment

Consistent double-digit growth peaks at $1.73B spend.

- Generative AI
- Agentic AI
- Licenses
- Tokens
- Specialized AI Hardware

Comprehensive Tech Inclusion



High Tech & IT Lead the Market

Nearly 32%
of all AI Spending by 2029



Budget Allocation in High Tech

High Tech firms dedicate 20% of their total IT budget specifically to AI.



Public Sector Surge

Exceeds
$529 Million
in AI Expenditure by 2029

Public services (Government & Defence) will see a significant increase in AI investment.

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PREMIUM INSTITUTIONAL RESEARCH BRIEF

The Macro Horizon: Nearing the $1.7 Billion Mark

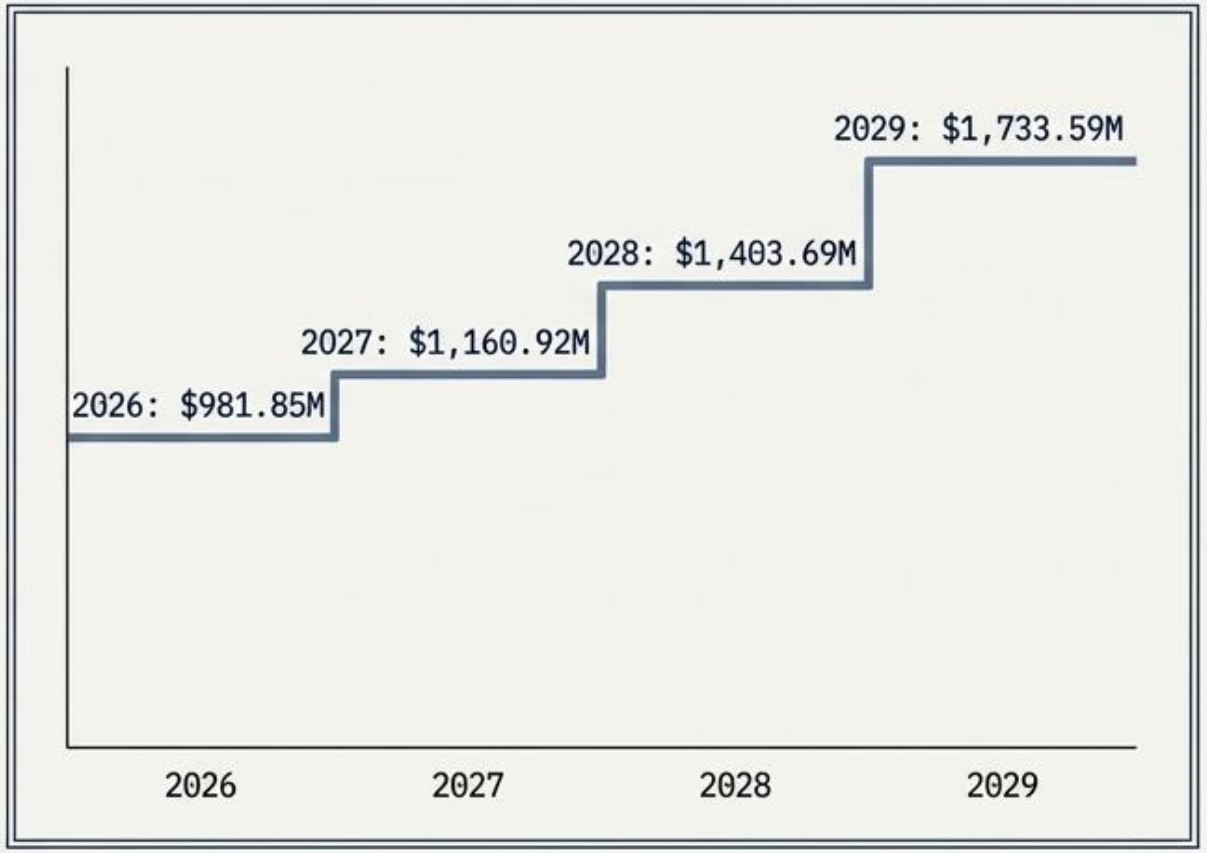
2029 Projection

$1,733.59M

2026 Baseline

$981.85M

+76.5% Total Market Growth over 36 months



The Israeli AI market (comprising GenAI/Agentic AI projects, licenses, tokens, and specialized hardware) is scaling exponentially. However, aggregate growth masks a volatile underlying shift in who is driving this spend.

NotebookLM

AI Market in ISRAEL: 2026 to 2029 Forecast



$ .984 Billion

$ 1.73 Billion

Aggregate analysis of 16 key verticals including Government, High Tech, and Financial sectors reveals a Compound Annual Growth Rate (CAGR) driven by an acceleration in the Financial and SMB sectors.

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Unpacking the Per-Worker AI Budget Architecture



The Visible Tip: Software & Seats
$360 / Year

The Human Enablement Layer
$150 – $1,000+
L&D and specialized certifications

The Systemic Integration Layer
$0 – $2,000+
IT infrastructure, custom development, and strategic overhead

The Macro Catalyst

$ .984 Billion

STKI projection for AI spending in Israel in 2026

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Unpacking the Per-Worker AI Budget Architecture



Token Inflation

Uncapped context windows and continuous autonomous agent runtimes have amplified operational overhead, **transforming compute cost into a core margin constraint.**

The Macro Catalyst

$ .984 Billion

STKI projection for AI spending in Israel in 2026

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Israel's AI Horizon: Market Projections 2026–2029



2029 PROJECTED HORIZON

2029: $1.73 BILLION

Total Market Value (Nearly Doubled)

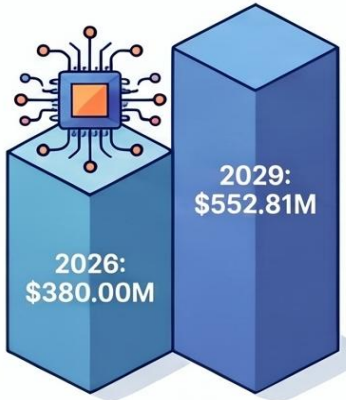
2026 BASELINE

2026: $983.98M

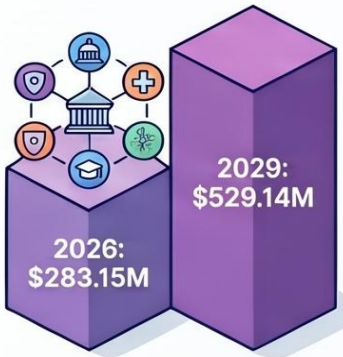
Total AI Expenditure

High Tech Remains the Primary Driver

Largest share, reaching $552.81M by 2029



HIGH TECH / IT



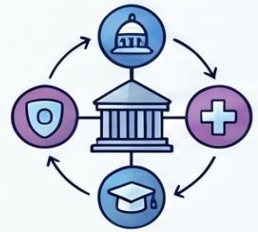
PUBLIC SECTOR



FINANCIAL SECTOR

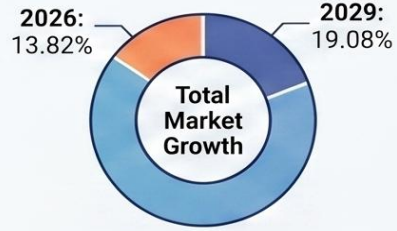
Financial Sector Market Share Growth (2026-2029)

HIGH TECH / IT



$529M Public Sector AI Investment

Combined spending from gov, defense, health, and education



Financial Sector Doubling its Market Share

Grow from 13.82% to 19.08% of the total market

EMERGING MOMENTUM & KEY TRENDS



150% Yearly Growth in Finance

Highest year-over-year expenditure increase (2026-2029)



SMBs Achieve Steady 5% Market Share

Small & Medium Businesses grow AI spend to $94.61M by 2029

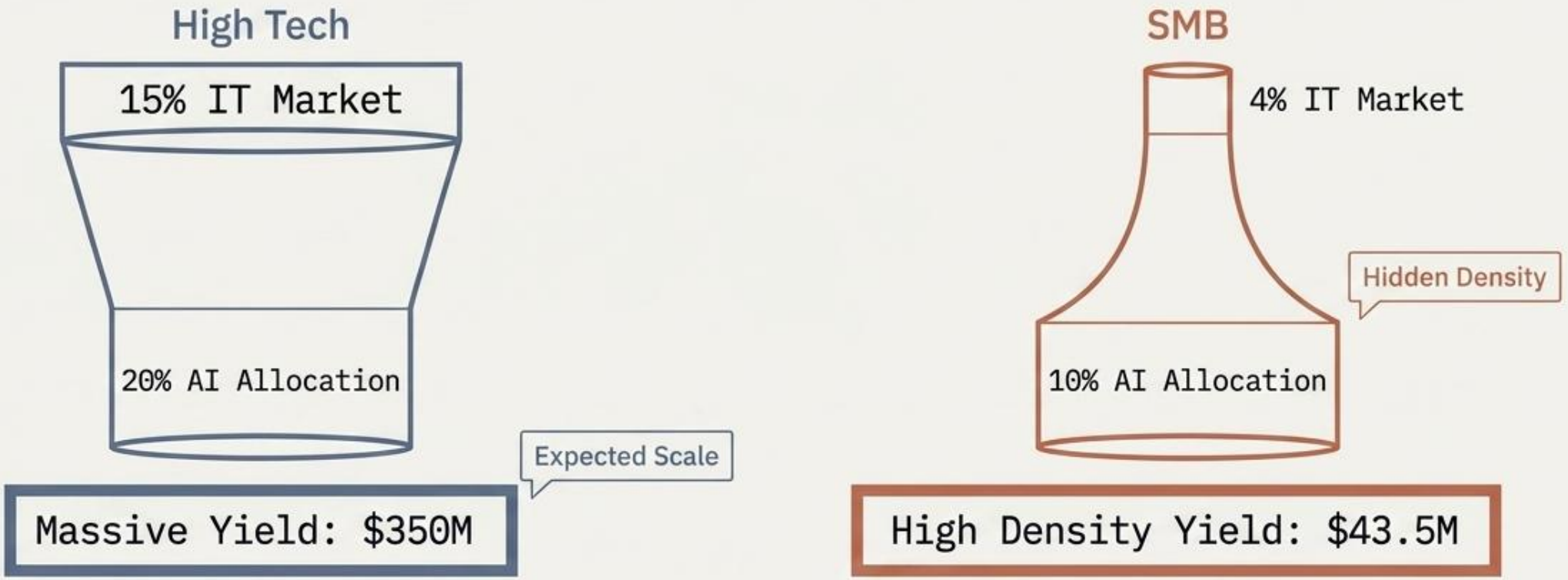
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The Two-Speed Market Thesis

Mature & Decelerating	Traditional & Surging
High Tech & IT	Financials, Public Sector, SMBs
Shrinking from 38.70% market share (2026) to 31.89% (2029).	Financial market share expanding from 13.82% to 19.08%.
The initial drivers of AI adoption. Massive absolute spend, but growth rates are plateauing as infrastructural investments settle into operational rhythms.	Traditional enterprise verticals undergoing rapid GenAI transformation. Driven by high, concentrated AI budget allocations despite smaller overall IT footprints.

NotebookLM

The Budget Funnel: How Niche Sectors Generate Outsized AI Revenue



Do not target accounts based on legacy IT spend. High AI intensity acts as a multiplier. A highly intensive, small-IT sector (SMB) is vastly more lucrative per operational dollar than a low-intensity, large-IT sector (Manufacturing/Retail at 5.25% intensity).

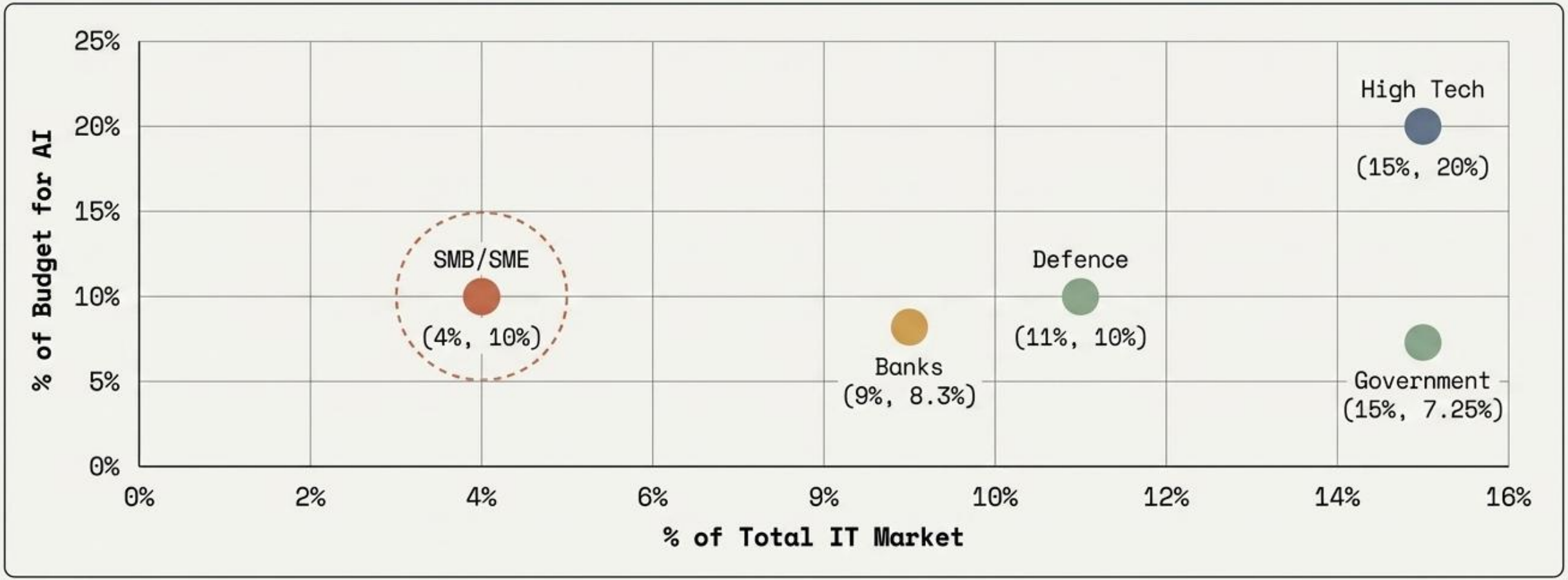
NotebookLM

Sector Velocity Matrix

Sector	Scale (2026-29)	Trajectory (Peak YoY)	Intensity (AI Budget %)	Growth Class
High Tech/IT	$380M -> $552M 	115% -> 110% (Decelerating)	20.00%	Steady / Maturing
Financial	$135M -> $330M 	125% -> 150% (Accelerating)	6.10%	Hyper-Growth
Public	$283M -> $529M 	115% -> 130% (Accelerating)	7.00%	Heavyweight Accelerator
SMB/SME	$43.5M -> $94.6M 	145% -> 120% (Early Spike)	10.00%	Fast / Intensive

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The AI Intensity Index: Appetite vs. Footprint



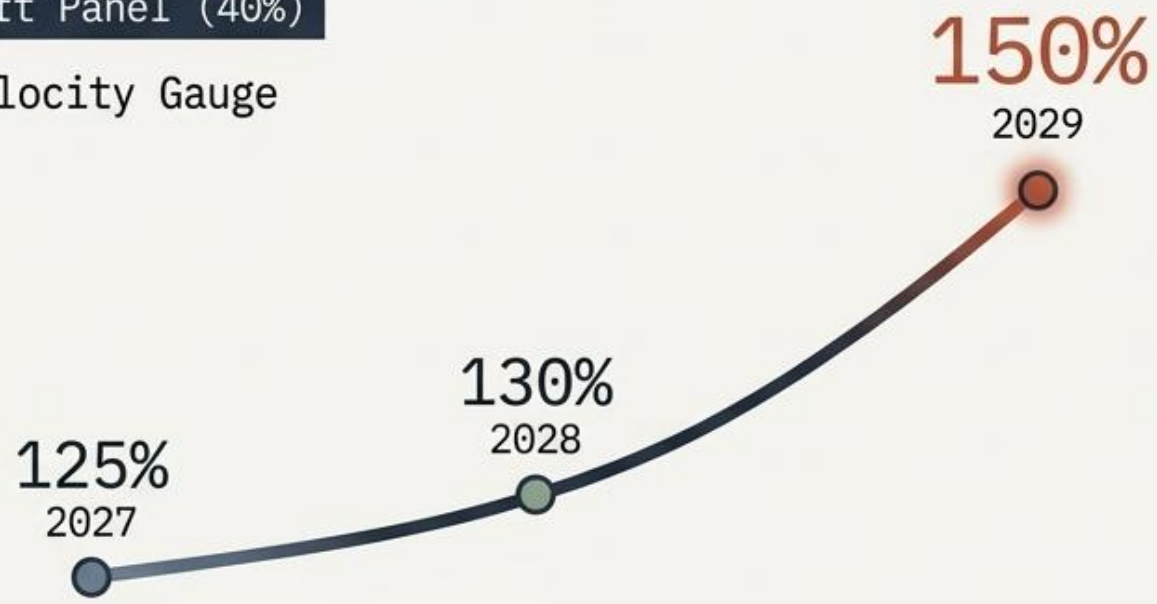
Disproportionate Allocation: SMBs represent only 4% of the total IT market, yet dedicate a massive 10% of their budgets specifically to AI—matching the Defence sector in intensity.

NotebookLM

The Ultimate Accelerator: Financial Sector Hyper-Growth

Left Panel (40%)

Velocity Gauge



The only macro-sector demonstrating **accelerating compound velocity** through the end of the decade.

Year-over-year percentage jumps from financial row:

2027: 125% 2028: 130% 2029: 150%

Right Panel (60%)

$330.83M

Total scale eclipsed by 2029

Sub-Sector Highlight

Banks are the engine, holding 9% of the total IT market and allocating a highly aggressive **8.30%** to AI.

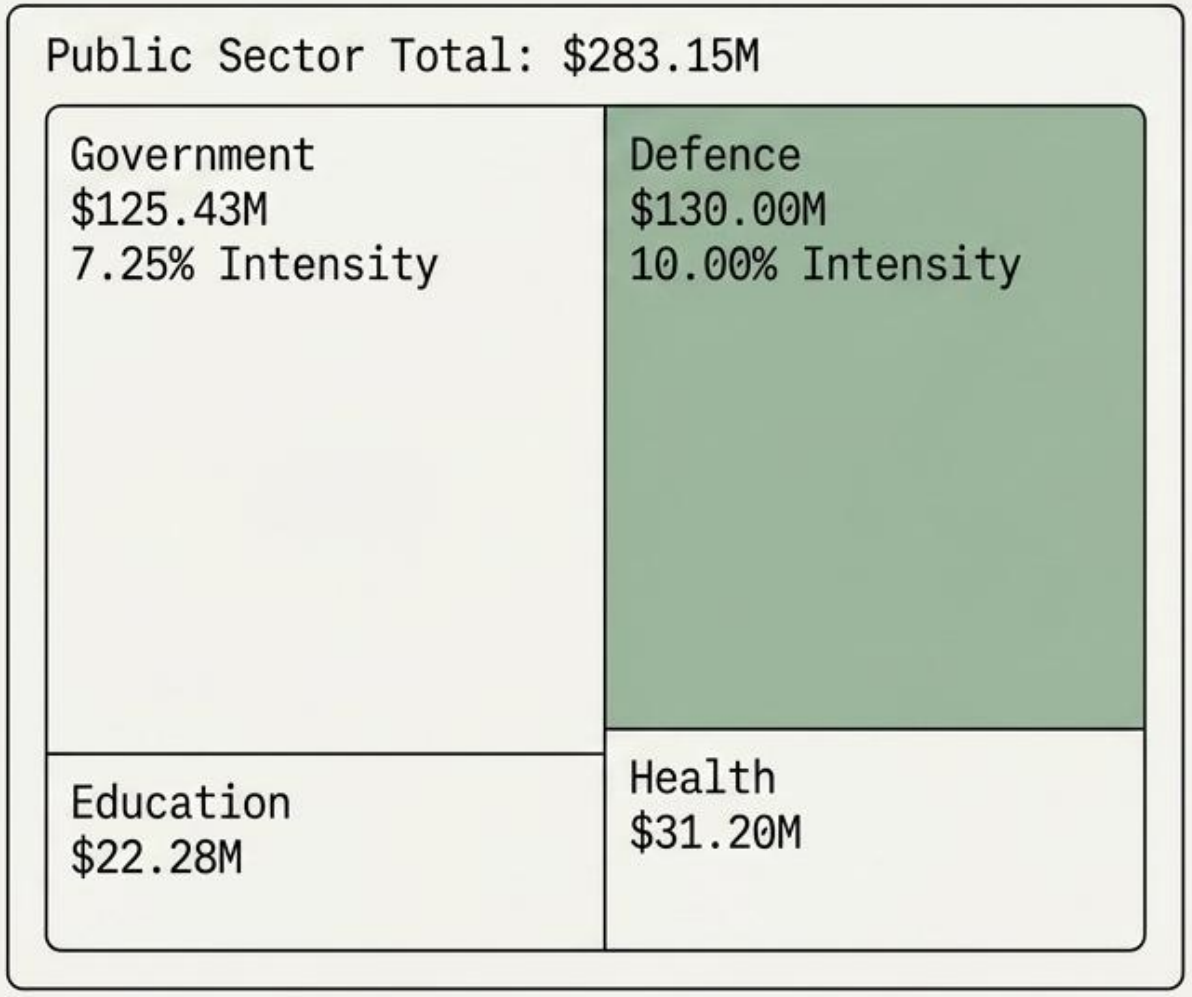
Strategic Takeaway

Financials are moving past experimentation into systemic GenAI deployment (fraud detection, agentic customer service, algorithmic trading).

NotebookLM

The Sleeping Giant: Public & Defense Infrastructure

Left Panel (Breakdown)



Metrics

The Horizon

The Public Sector will cross half a billion dollars ($529.14M) by 2029, capturing nearly 31% of the total Israeli AI market.

Strategic Takeaway

Defense is uniquely positioned as a primary target. With a 10% AI budget allocation, it matches the agility and intensity of SMBs, but operates with the financial scale of a sovereign entity.

NotebookLM

The Strategic Imperative

The era **of default reliance on High Tech as the primary driver of AI revenue is ending.** By 2029, the most lucrative GenAI and Agentic AI markets **will be legacy institutions.**

1. Pivot GTM to Finance

Align sales engineering to handle the 150% compound acceleration in Banking and Insurance by 2029.

2. Target Defense Intensity

Capitalize on the Defence sector's aggressive 10% budget allocation to secure massive, stable public contracts.

3. Productize for SMBs

Build out-of-the-box agentic solutions for SMBs—a sector with a small footprint (4% IT) but a massive appetite (10% budget).

NotebookLM



Israel

IT Market Forecasts (statistics)



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



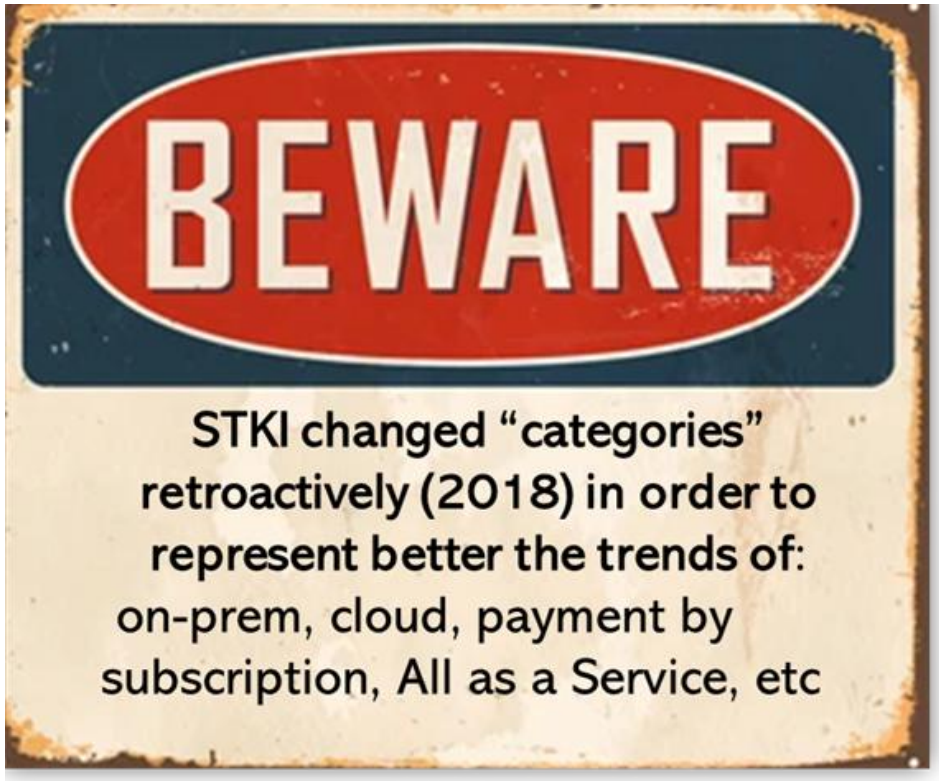
Reut Shefer Bar



GenAI Analyst

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Values in Million USD

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How we check “our” economic forecasts

State of the Economy Index (% change)
Probability of a slowdown

(Both monthly data sets)

PMI
bank hapoalim
Monthly Data





Hot Weather

CAUSATION

CAUSATION

Ice Cream Sales



IT Market

CORRELATION



Sunburn

IT Company Budgets

Business Tendency Survey

(Monthly data set)

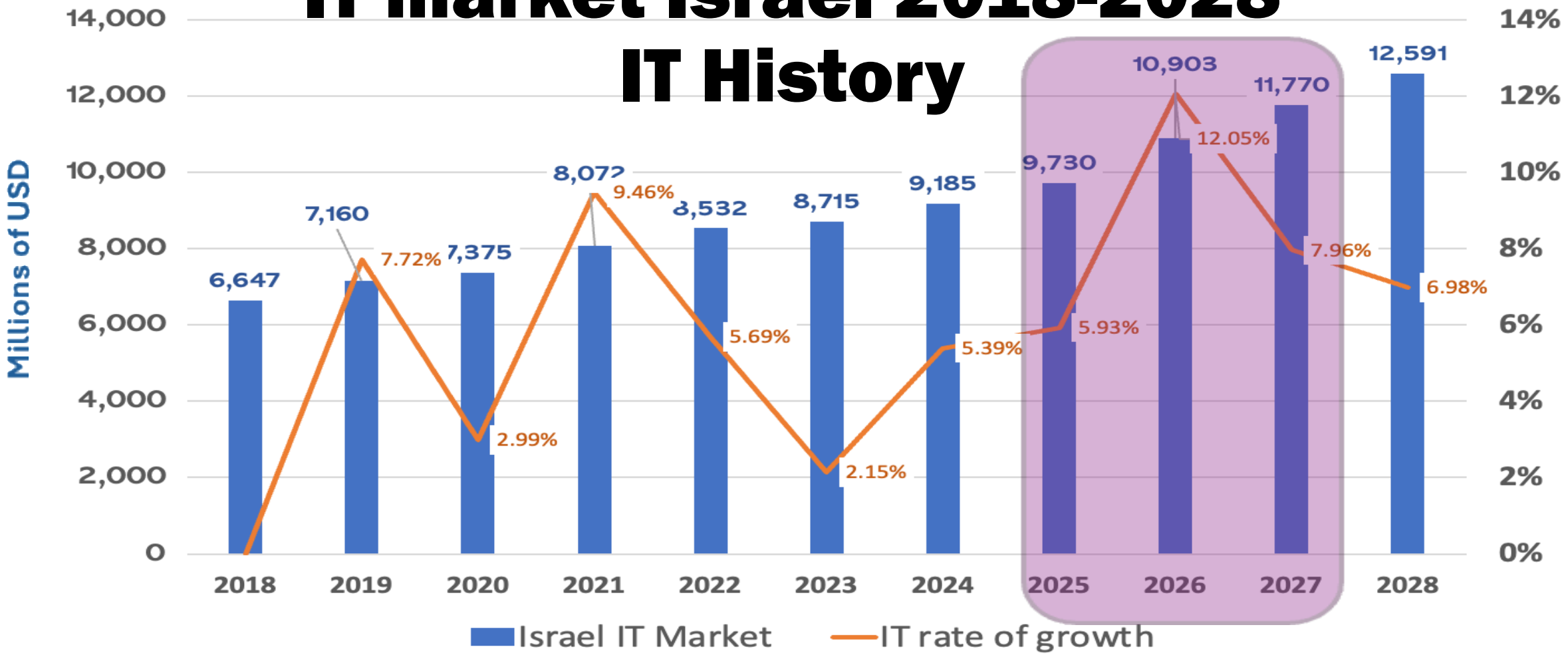
הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

Reichman University

The Melnick Index
(Monthly data set)

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IT market Israel 2018-2028
IT History

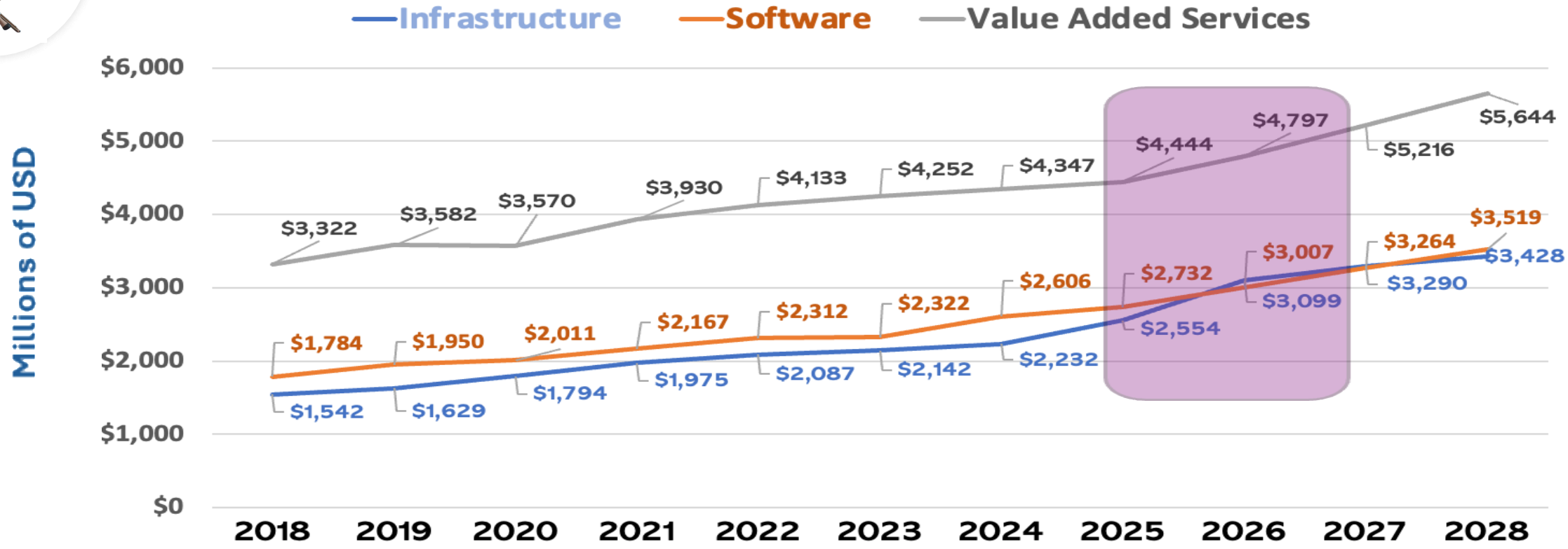


	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Israel IT Market	6,647	7,160	7,375	8,072	8,532	8,715	9,185	9,730	10,903	11,770	12,591
IT rate of growth	0.00%	7.72%	2.99%	9.46%	5.69%	2.15%	5.39%	5.93%	12.05%	7.96%	6.98%

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Changes in IT market Economics 2018-2028



	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Infrastructure	$1,542.15	$1,628.50	$1,794.00	$1,975.00	$2,087.00	$2,142.00	$2,232.00	$2,554.00	$3,099.00	$3,290.00	$3,428.00
Software	$1,783.50	$1,949.90	$2,011.00	$2,167.30	$2,311.80	$2,321.50	$2,606.00	$2,732.00	$3,007.00	$3,264.00	$3,519.00
Value Added Services	$3,321.80	$3,582.00	$3,569.50	$3,930.00	$4,133.00	$4,251.50	$4,347.00	$4,444.00	$4,796.50	$5,216.00	$5,644.00
TOTAL MARKET	6,647	7,160	7,375	8,072	8,532	8,715	9,185	9,730	10,903	11,770	12,591

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Israel

Infrastructure Product Markets 2025 ”vendor rankings”



Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar



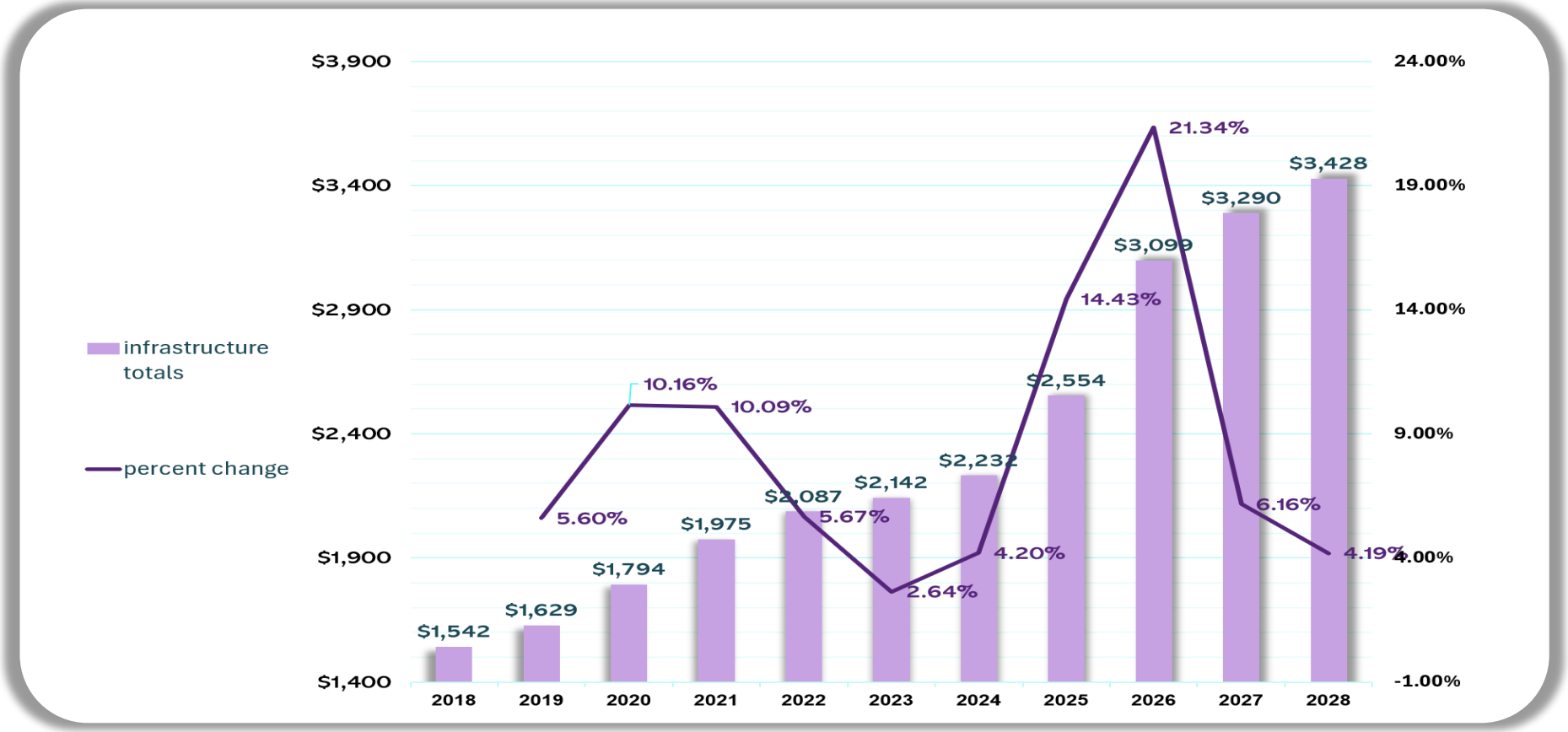
GenAI Analyst

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Infrastructure

Infrastructure Market 2018-2028





2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
$1,542.15	$1,628.50	$1,794.00	$1,975.00	$2,087.00	$2,142.00	$2,232.00	$2,554.00	$3,099.00	$3,290.00	3428.00
	5.60%	10.16%	10.09%	5.67%	2.64%	4.20%	14.43%	21.34%	6.16%	4.19%

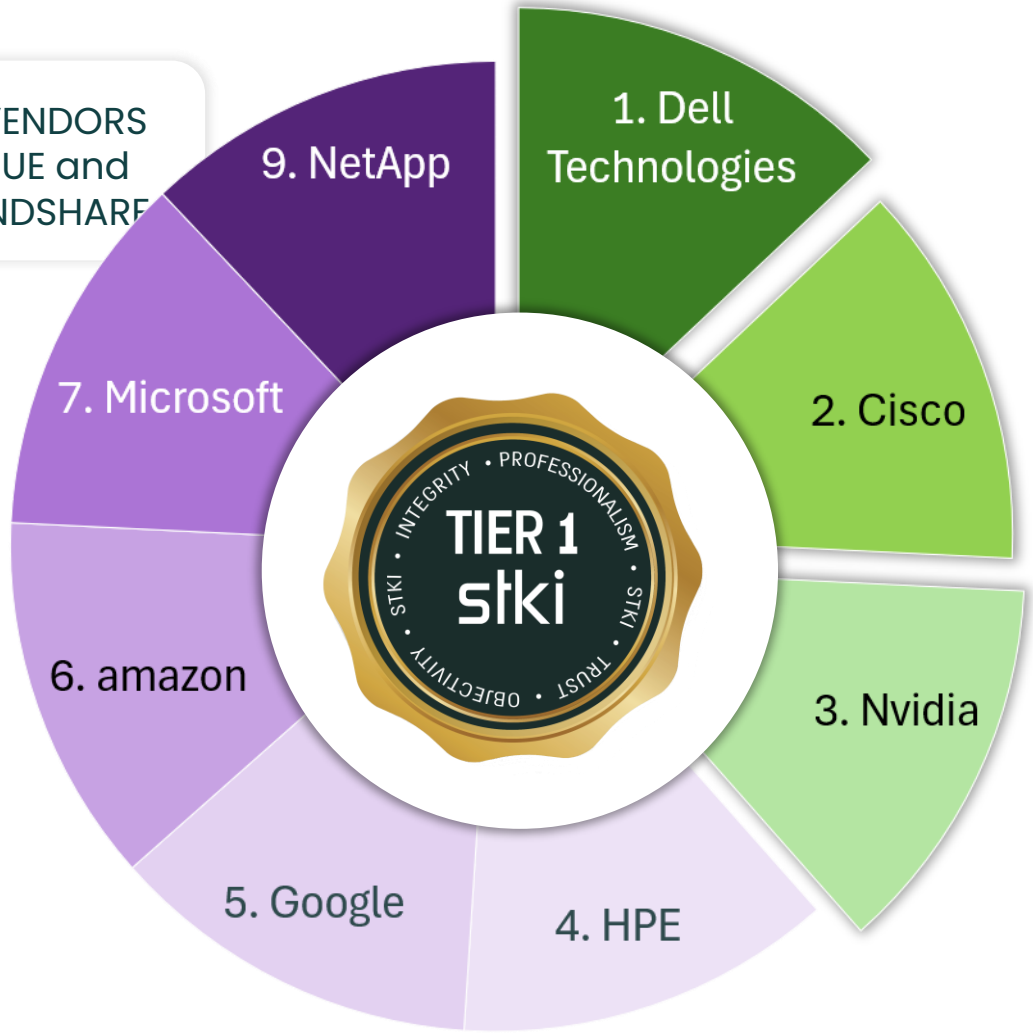
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Infrastructure

TOP VENDORS: Infrastructure

We rank VENDORS by REVENUE and CLIENT MINDSHARE

Infrastructure suppliers



Infrastructure VARs



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Infrastructure

Infrastructure Categories (pages)

Servers & Appliances	
Page:	183

Client PCs	
Page:	195

Enterprise Storage	
Page:	199

Networking, Call Centers Security Appliances	
Page:	207

Data Center Equipment Colocation & Self Service	
Page:	215

General Cloud Consumption	
Page:	220



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Infrastructure

Servers & Appliances Market 2020-2028

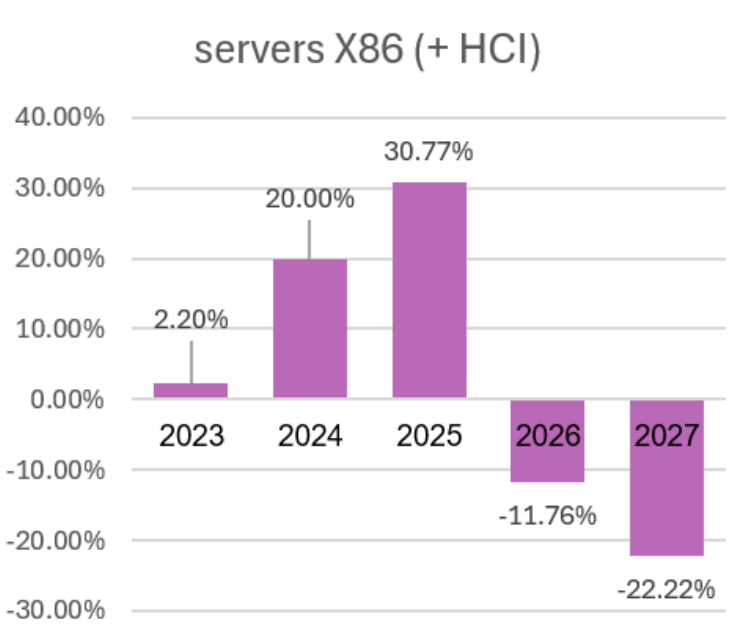
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
servers X86 (+ HCI)	290	10%	320	2%	325	-2%	318	2%	325	20%	390	31%	510	-12%	450	-22%	350
Legacy (non-x86)	26	19%	31	3%	32	-19%	26	-8%	24	-4%	23	-4%	22	-5%	21	-5%	20
Data Appliances and AI computing infrastructure	19	32%	25	40%	35	43%	50	50%	75	33%	100	50%	150	27%	190	16%	220
TOTALS	335	12.24%	376	4.26%	392	0.51%	394	7.61%	424	20.99%	513	32.94%	682	-3.08%	661	-10.74%	590

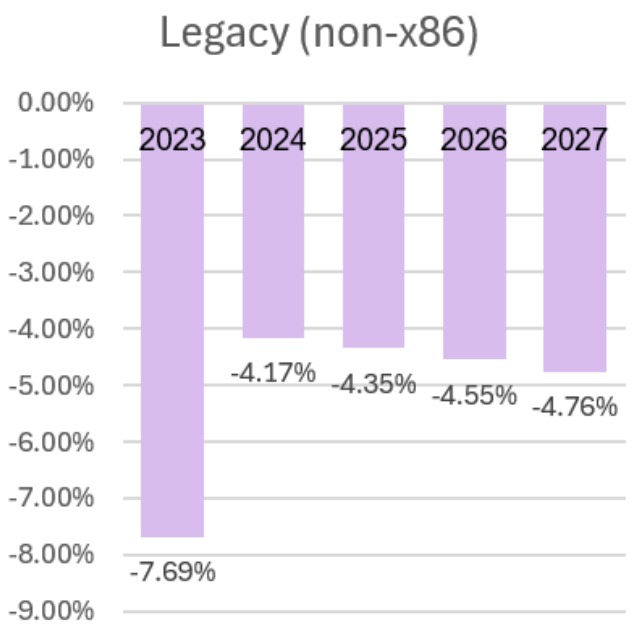
Values in Million USD

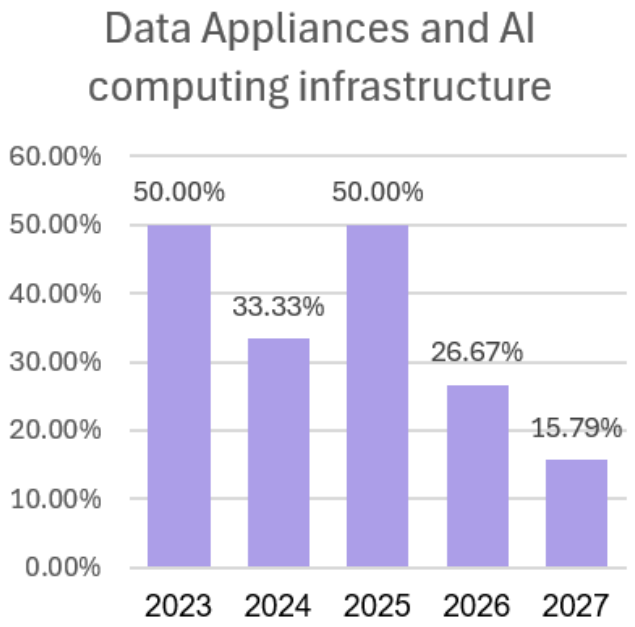
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Infrastructure

Servers & Appliances Market 2023-2027





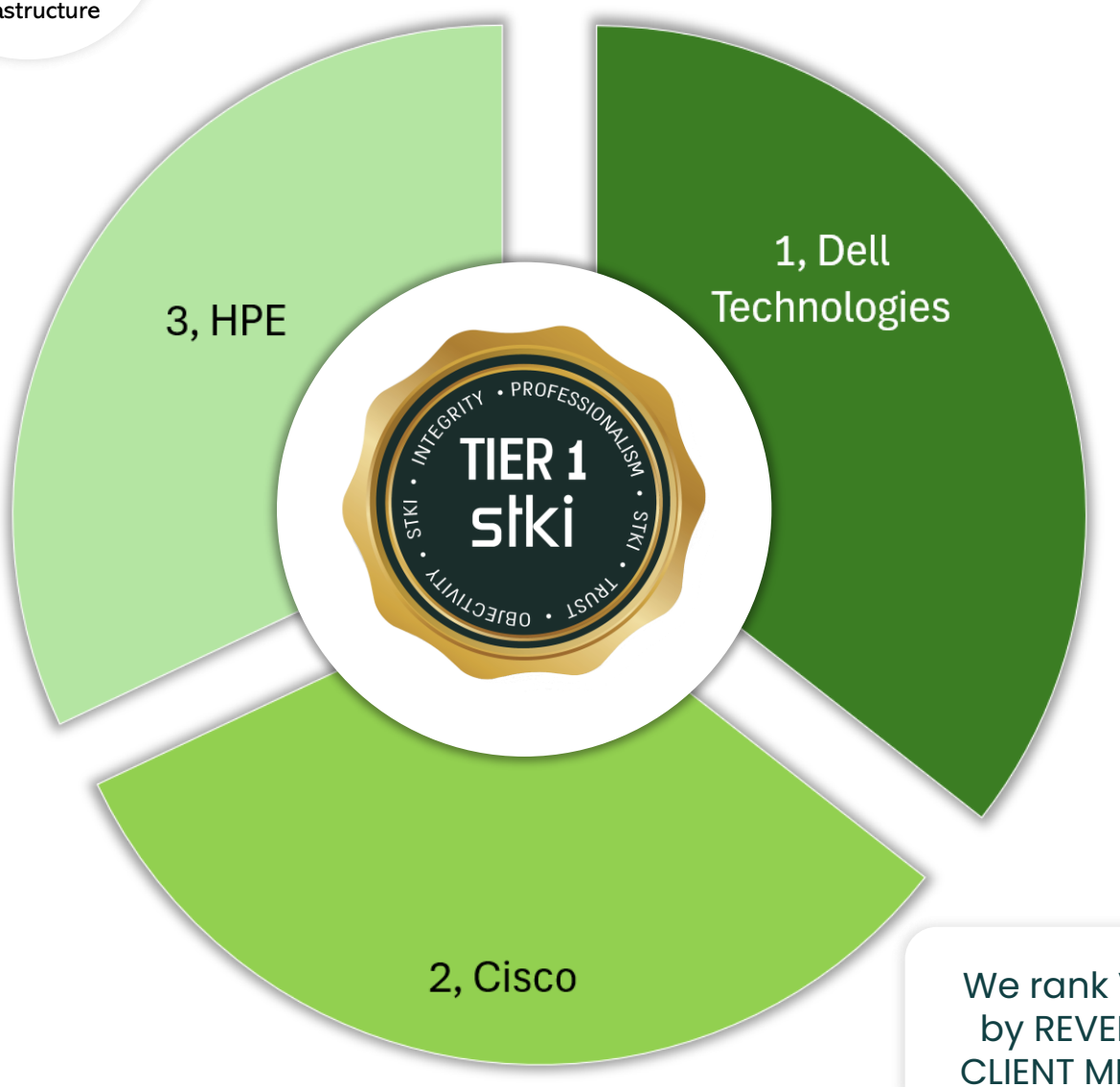


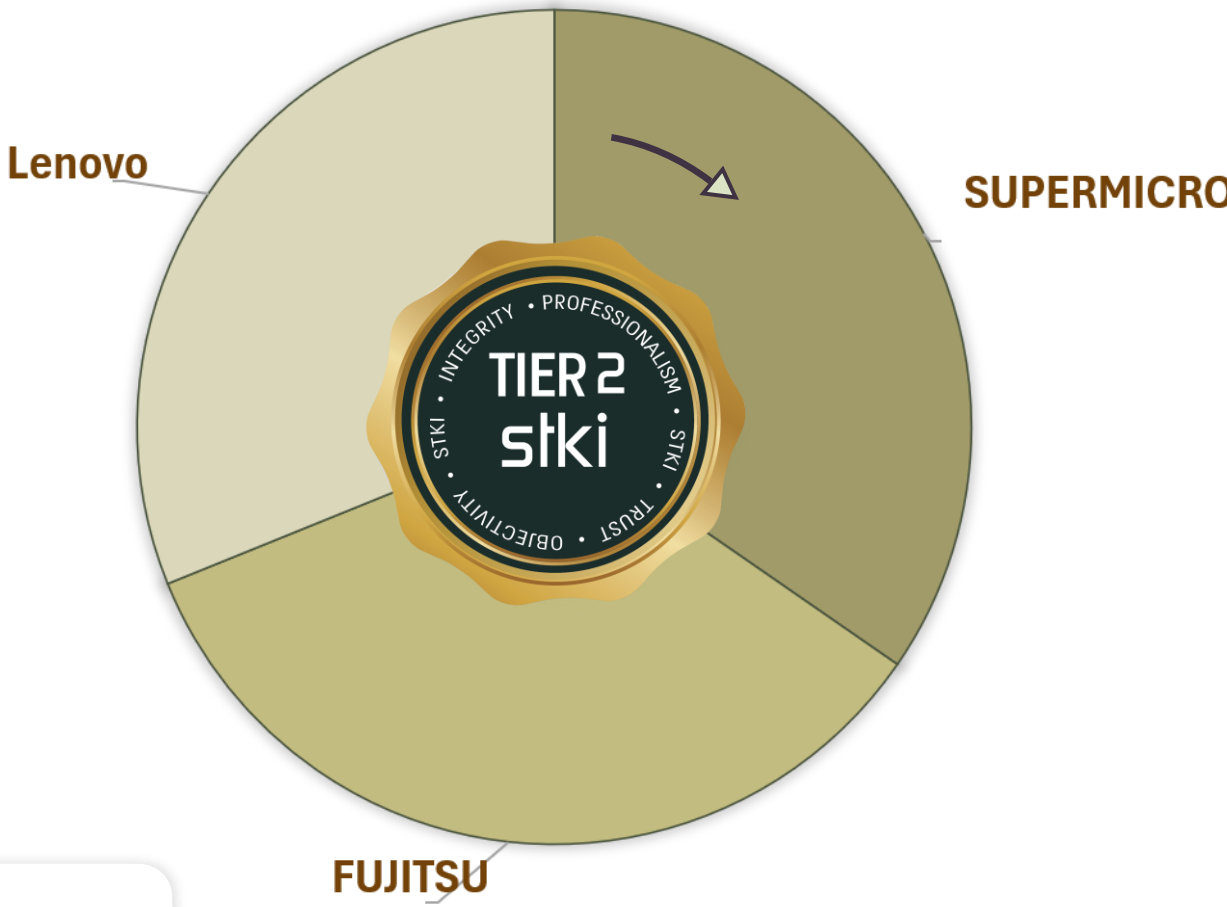
Values in Million USD

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Infrastructure

Servers X86 (+HCI)





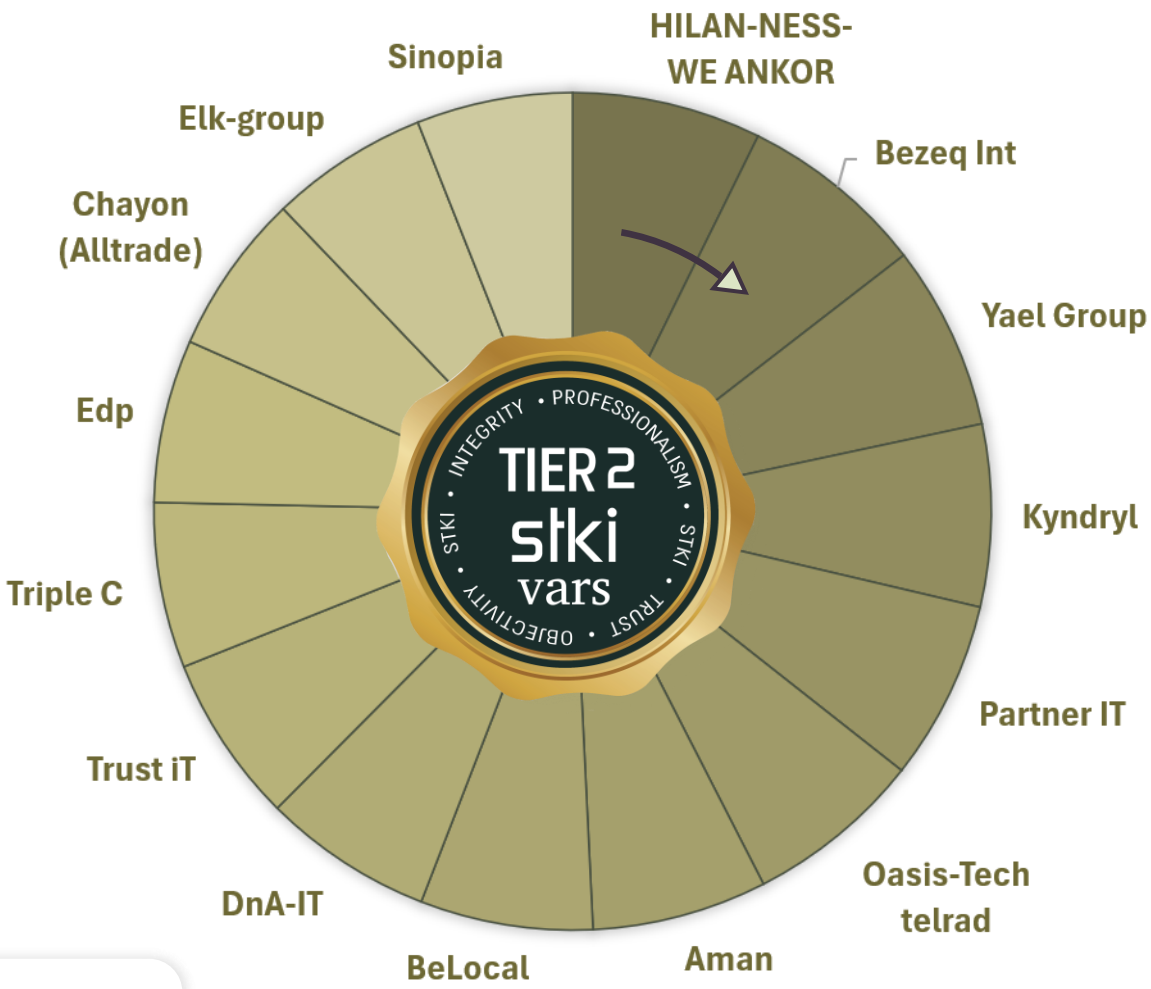
We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Infrastructure

Servers X86 (+HCI) VARs





We rank VENDORS
by REVENUE and
CLIENT MINDSHARE

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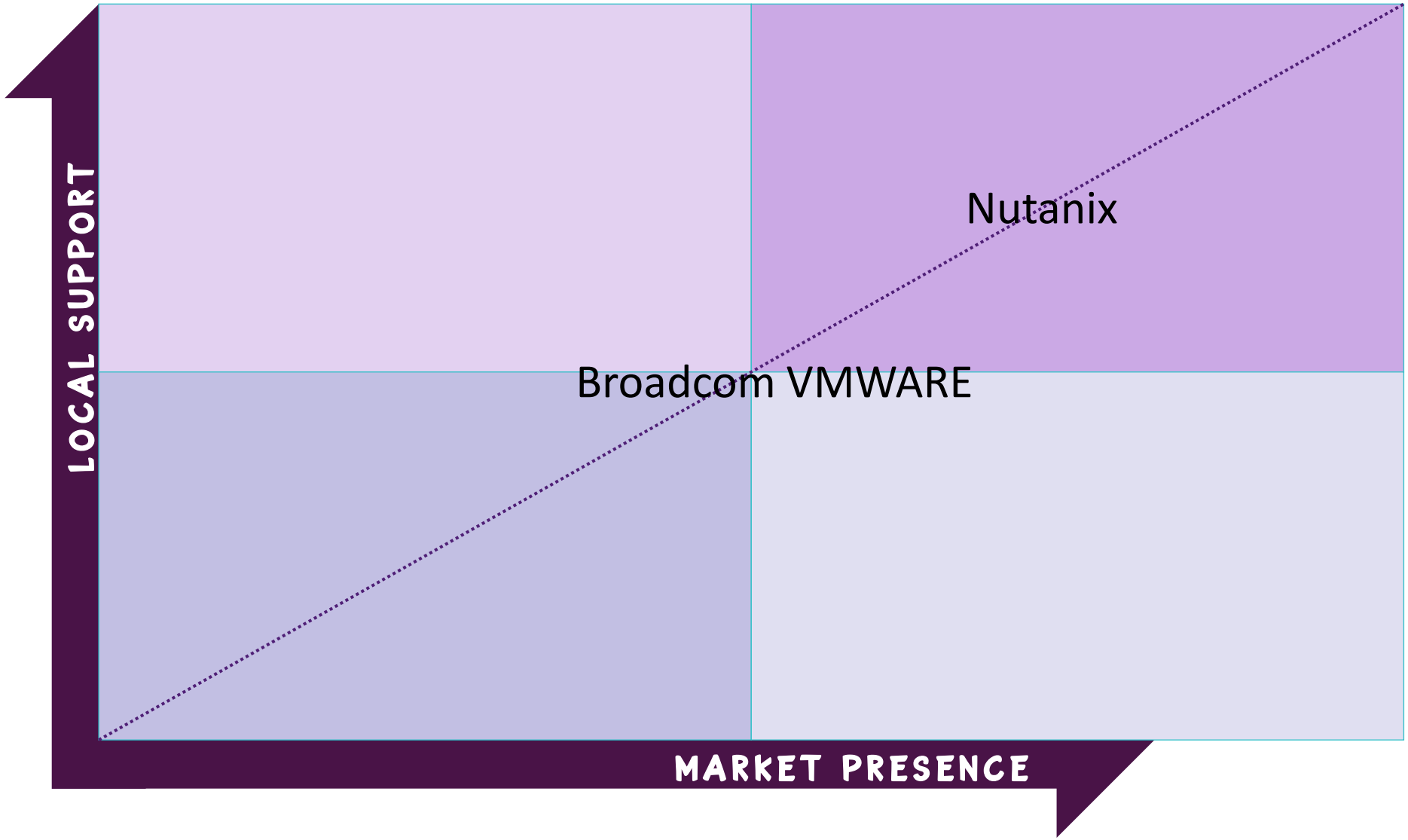
Servers X86 (+HCI) VARs

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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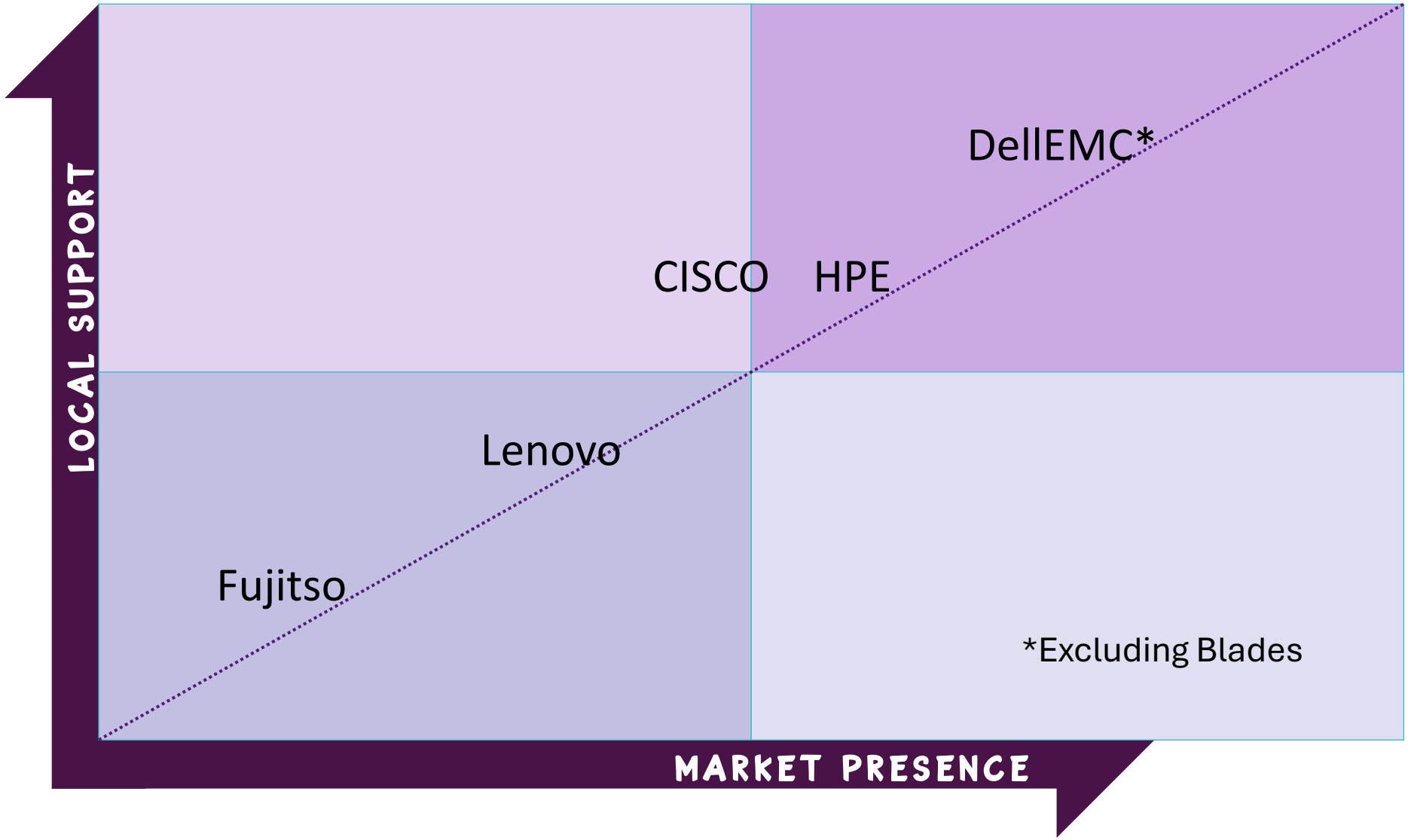
HCI platforms



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Infrastructure

General Purpose Intel Server - market presence 2025

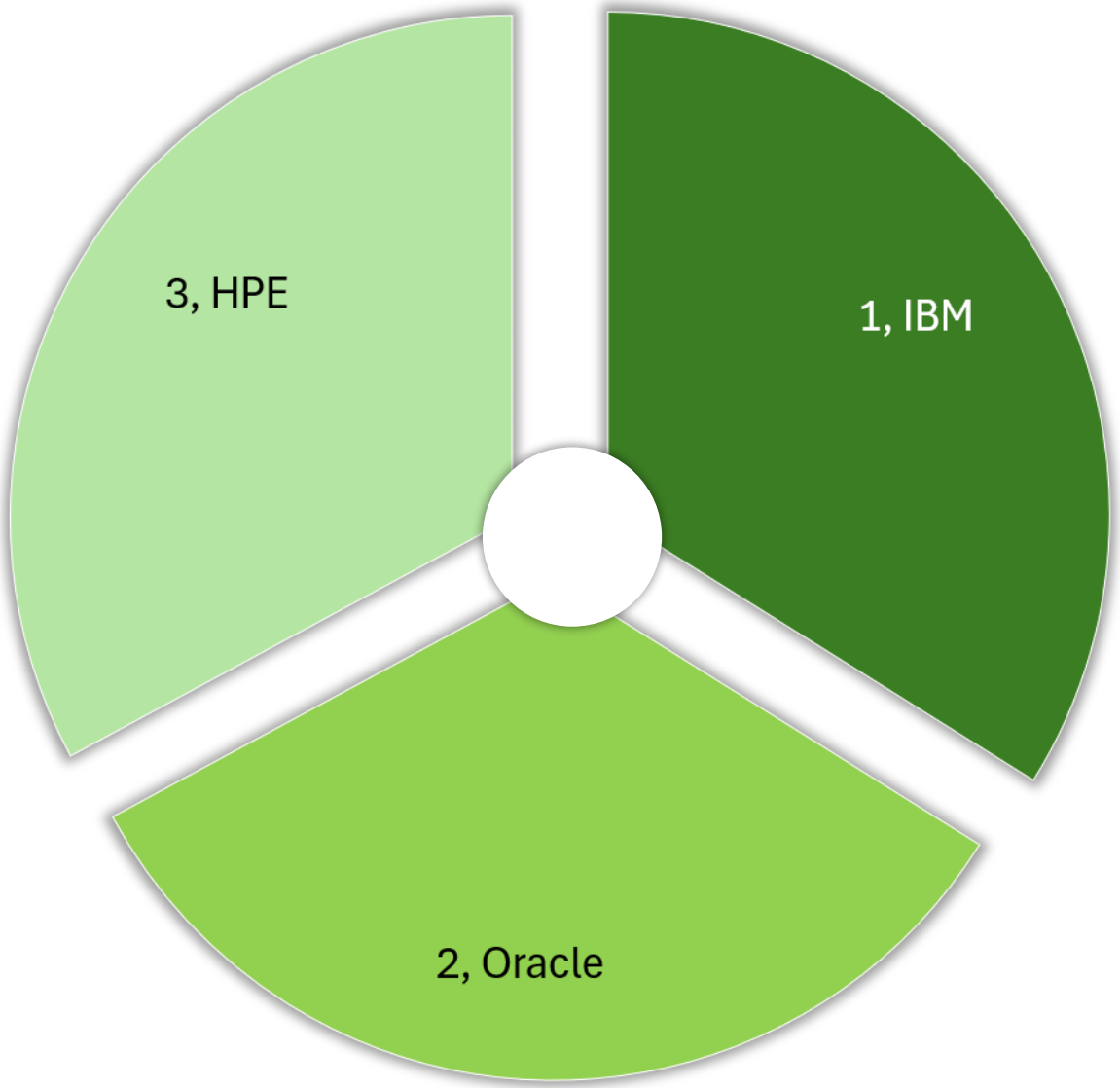


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Infrastructure

Legacy (non-x86)

We rank VENDORS by REVENUE and CLIENT MINDSHARE

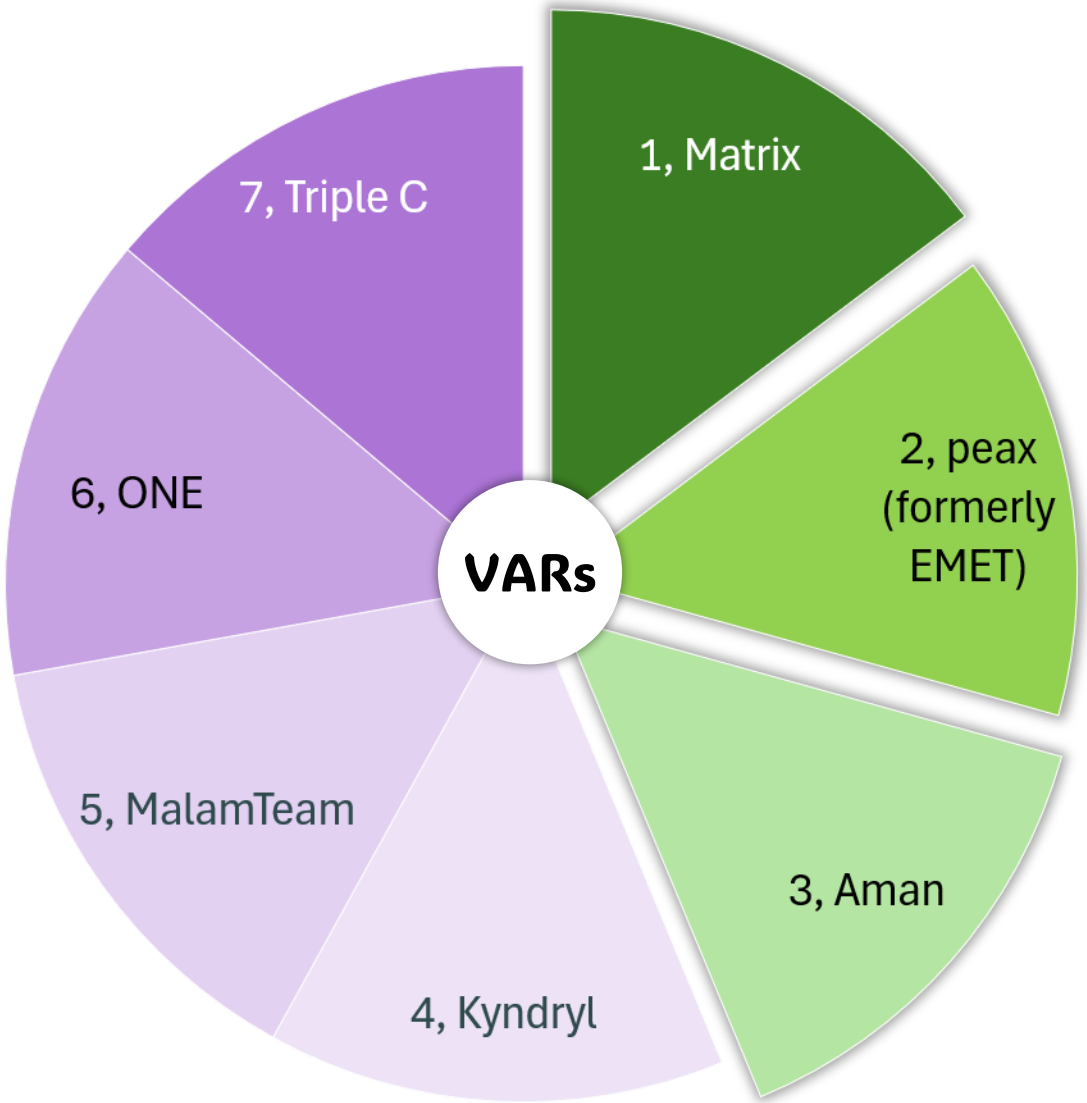


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Infrastructure

Legacy (non-x86) VARs

We rank VENDORS by REVENUE and CLIENT MINDSHARE

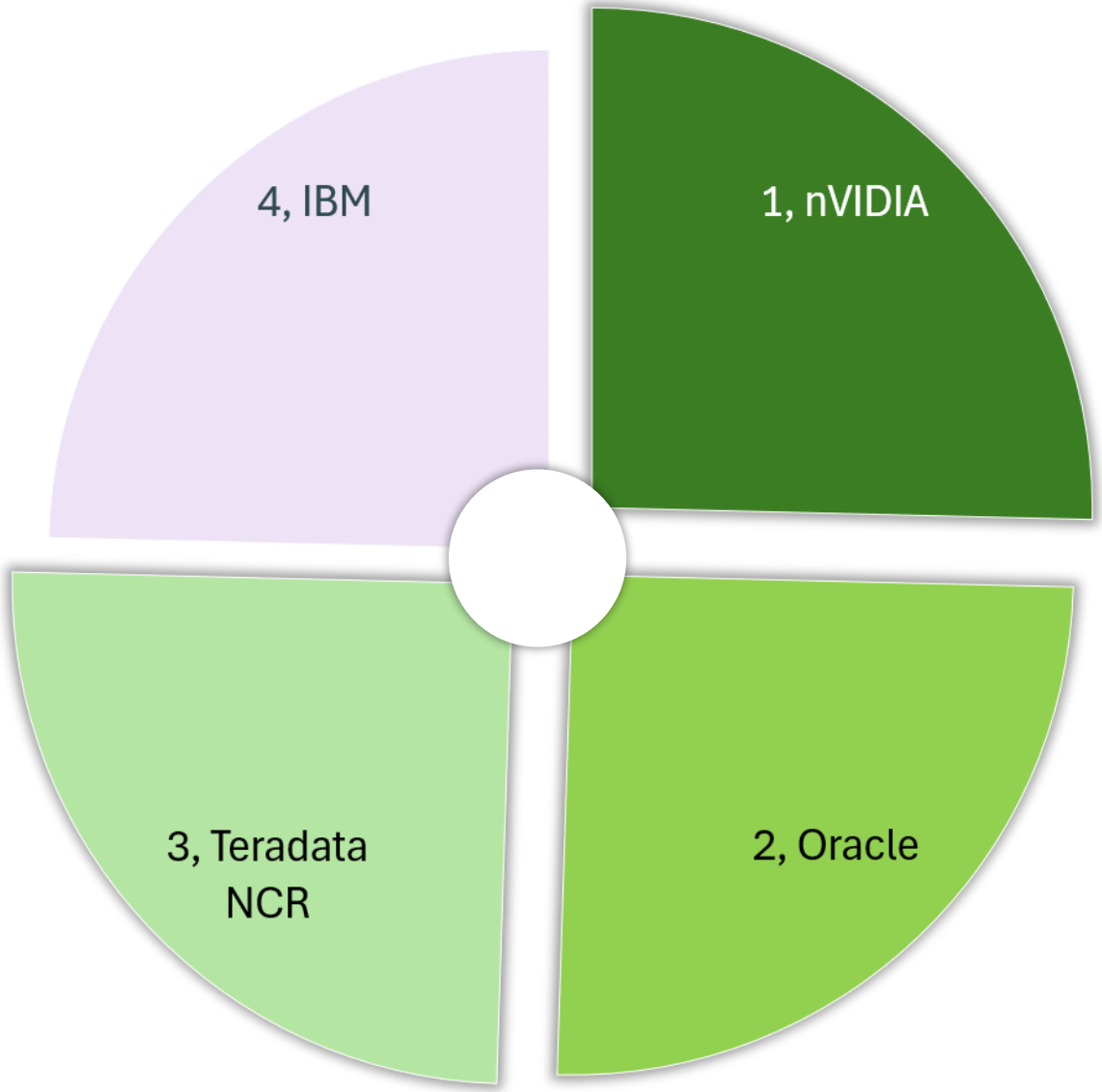


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Infrastructure

Data Appliances

We rank VENDORS by REVENUE and CLIENT MINDSHARE

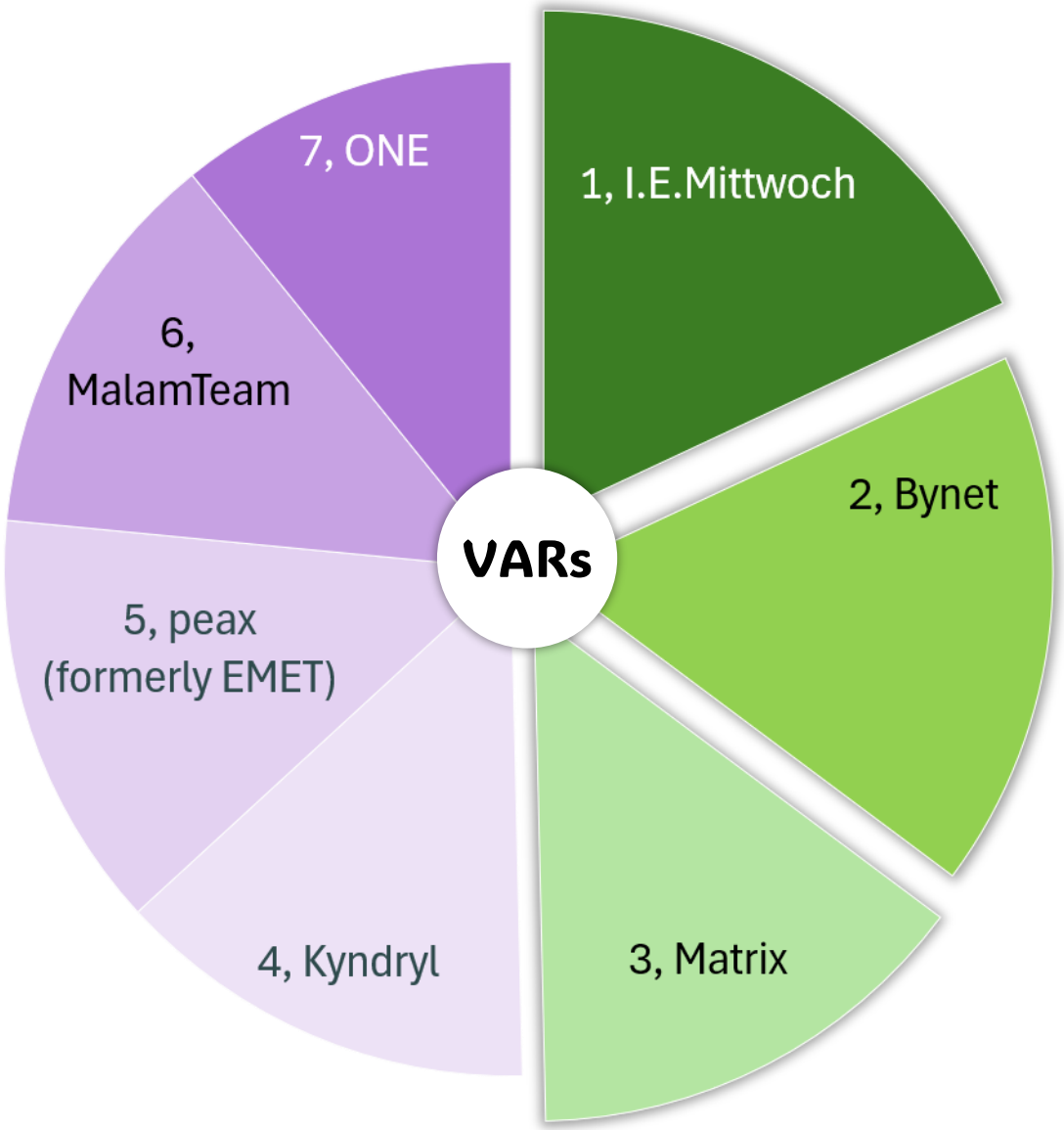


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Data Appliances VARs

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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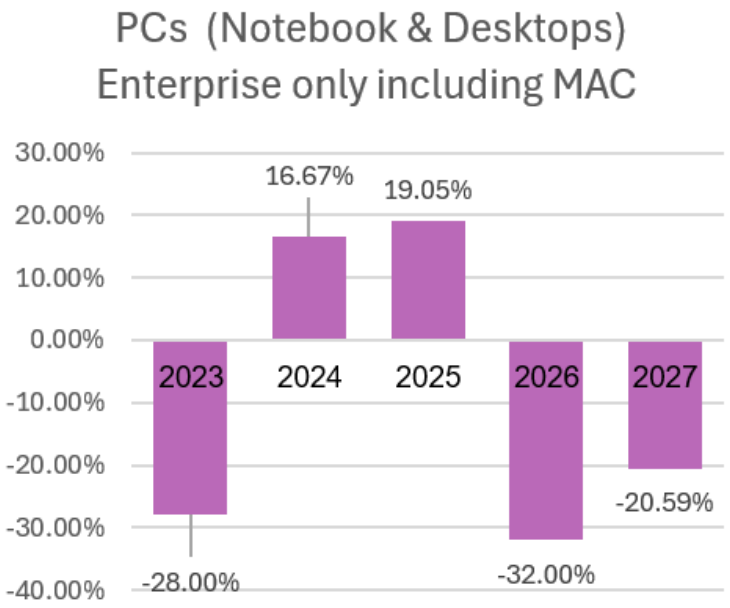
Clients (enterprises only) Market 2020-2028

	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
PCs (Notebook & Desktops) Enterprise only including MAC	362	-3%	350	-19%	285	-12%	250	-28%	180	17%	210	19%	250	-32%	170	-21%	135
TOTALS	362	-3.31%	350	-18.57%	285	-12.28%	250	-28.00%	180	16.67%	210	19.05%	250	-32.00%	170	-20.59%	135

Values in Million USD

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Clients (enterprises only) Market 2023-2027

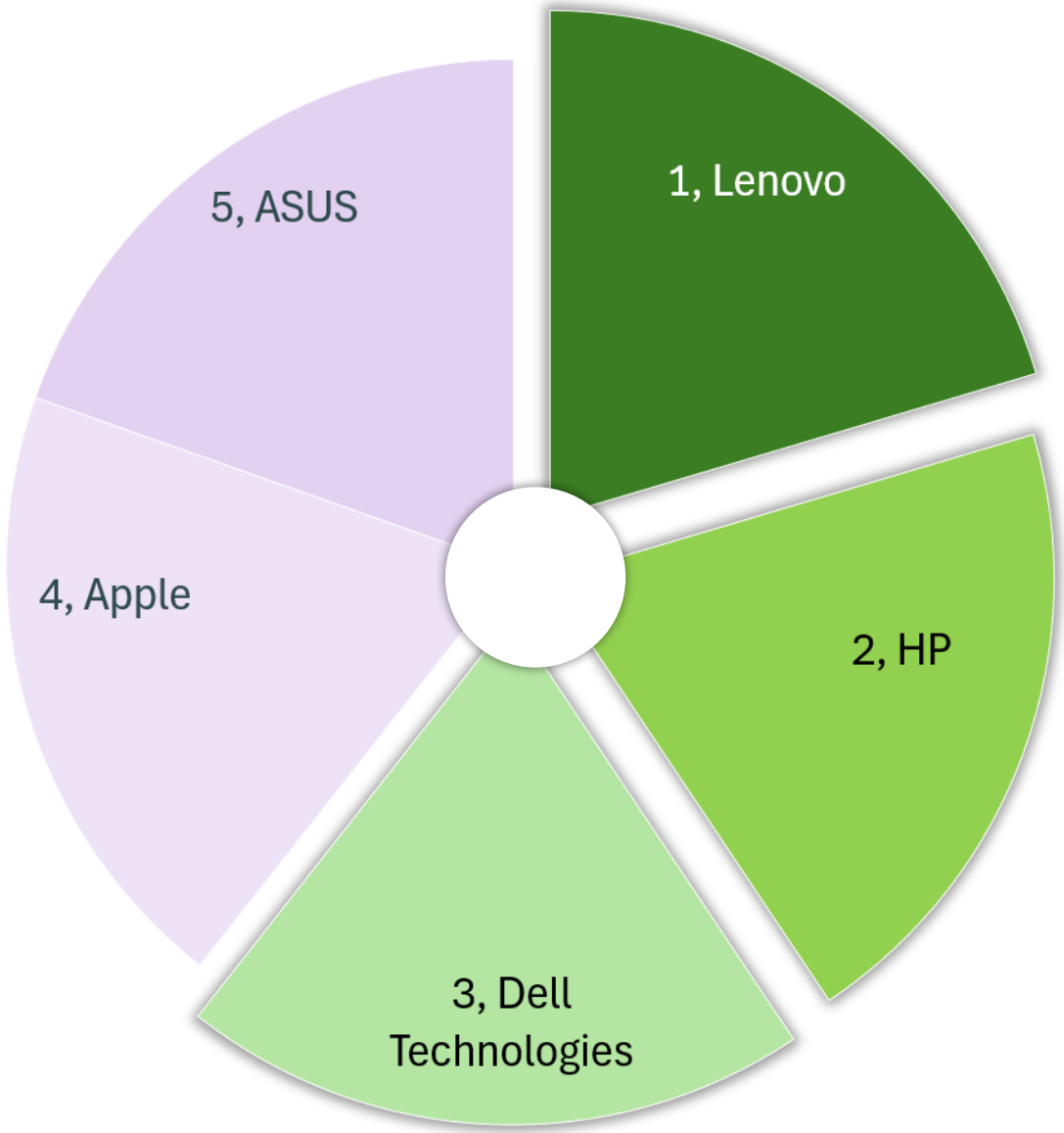


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Infrastructure

Window PCs (Notebook & Desktops) Enterprise only

We rank VENDORS by REVENUE and CLIENT MINDSHARE

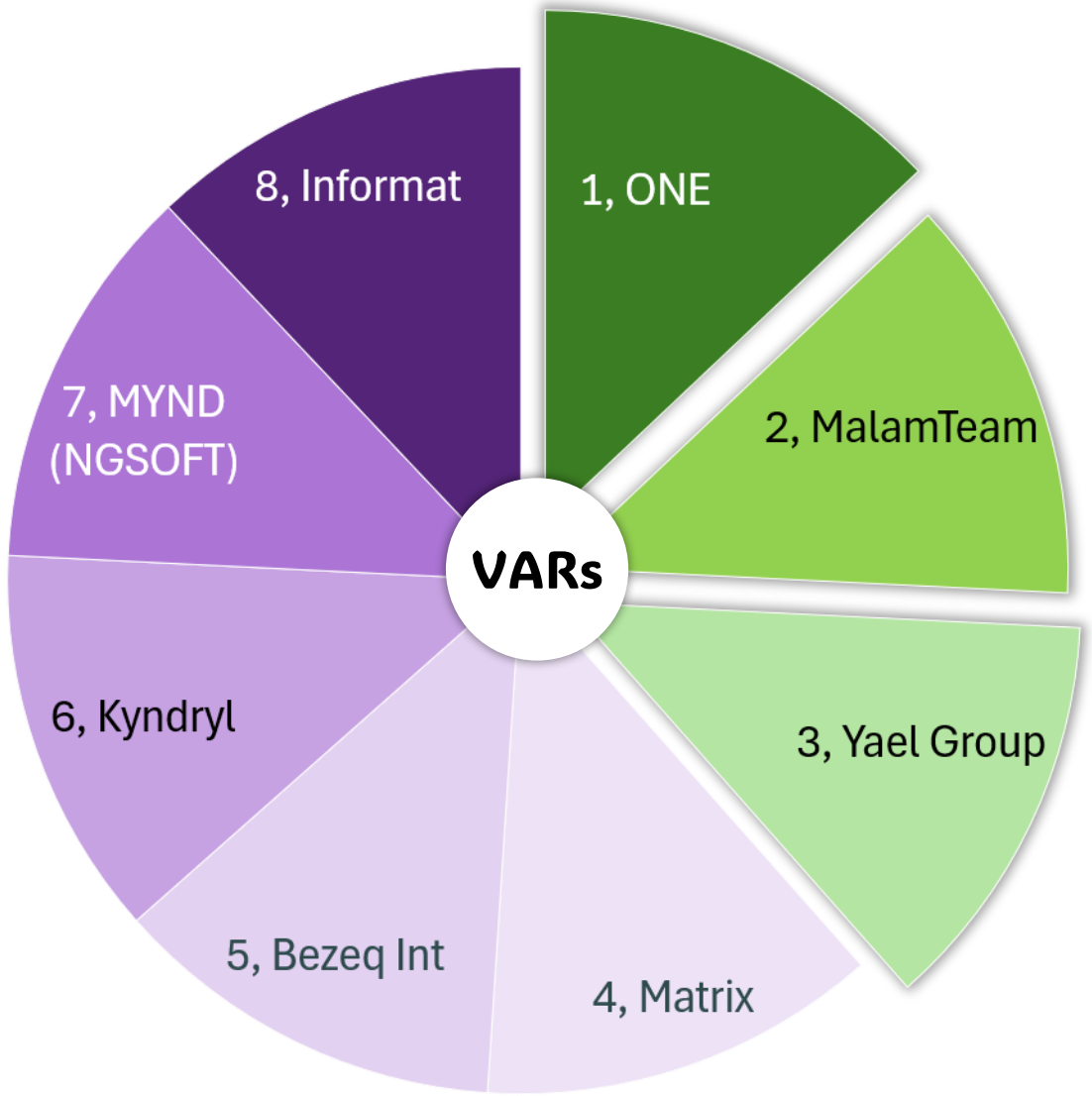


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Window PCs (Notebook & Desktops) Enterprise only

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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Infrastructure

Storage Appliances Market 2020-2028

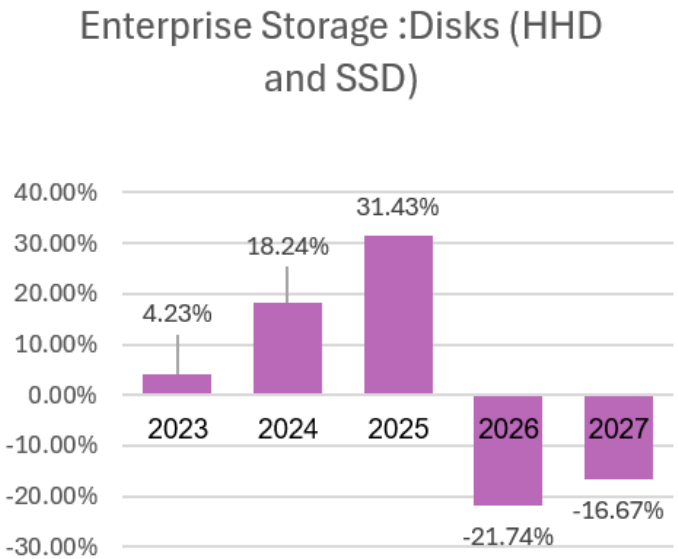
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
Enterprise Storage :Disks (HHD and SSD)	132	2%	135	2%	138	3%	142	4%	148	18%	175	31%	230	-22%	180	-17%	150
Other Storage HW - Tape Libraries & appliances, VTL Backup	42	14%	48	4%	50	-4%	48	-4%	46	-4%	44	5%	46	9%	50	10%	55
Storage Networking		#DIV/0!		#DIV/0!		#DIV/0!	15	27%	19	11%	21	5%	22	18%	26	8%	28
TOTALS	174	5.17%	183	2.73%	188	9.04%	205	3.90%	213	12.68%	240	24.17%	298	-14.09%	256	-8.98%	233

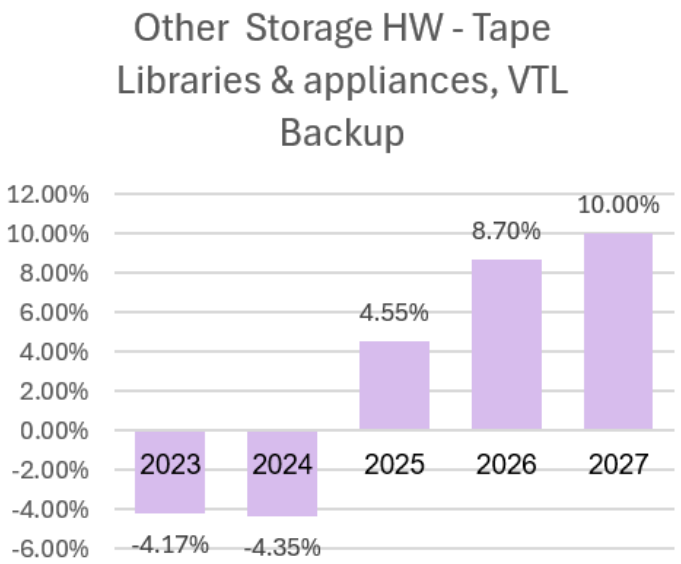
Values in Million USD

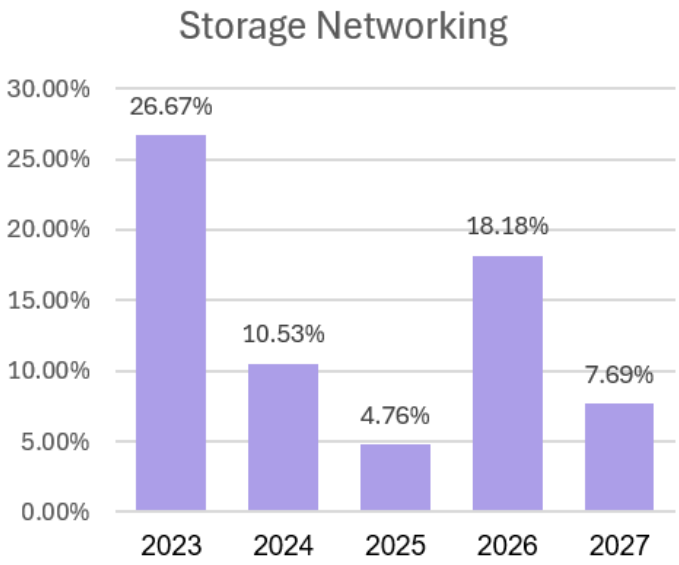
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Infrastructure

Storage Appliances Market 2023-2027







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