Israel IT Market Study 2026 V2.A Part 3: value added services market





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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IT Market Forecasts (Statistics)

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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”

Page: **364**



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STKI

Methodology and how to “understand” the results



Dr. Jimmy Schwarzkopf



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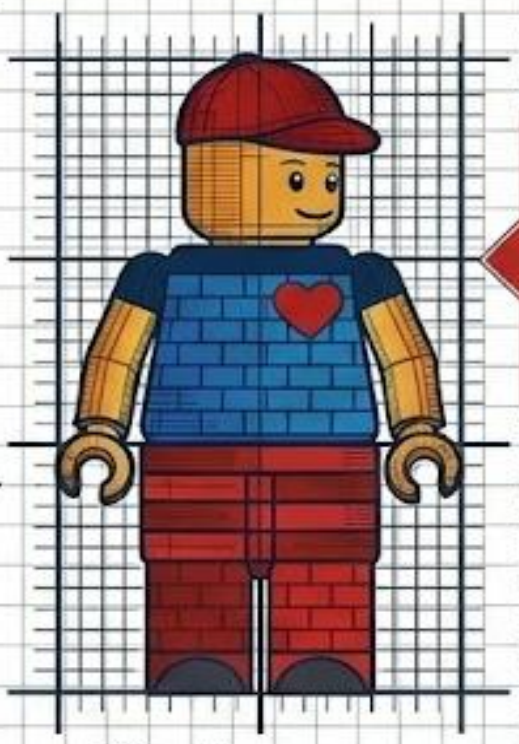
34 Years of Market Intelligence

1992
Founded

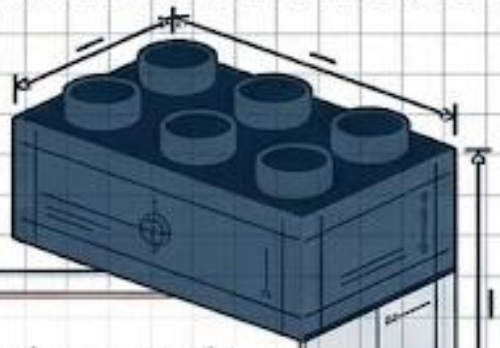
Thousands of annual face-to-face interviews with key industry participants.

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

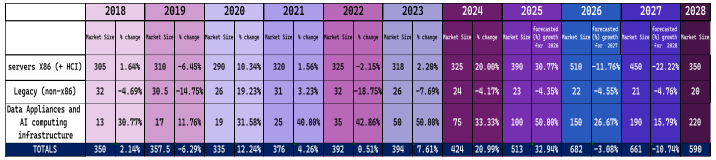


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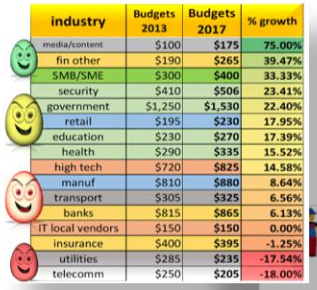




1. IT Trends
2. Surveys about organizational issues
3. Round Table Summaries
4. Industry IT Budgets
5. IT Market Forecasts by category
6. Vendor Tiers by category
7. Product Positioning
8. Staffing Ratios



	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



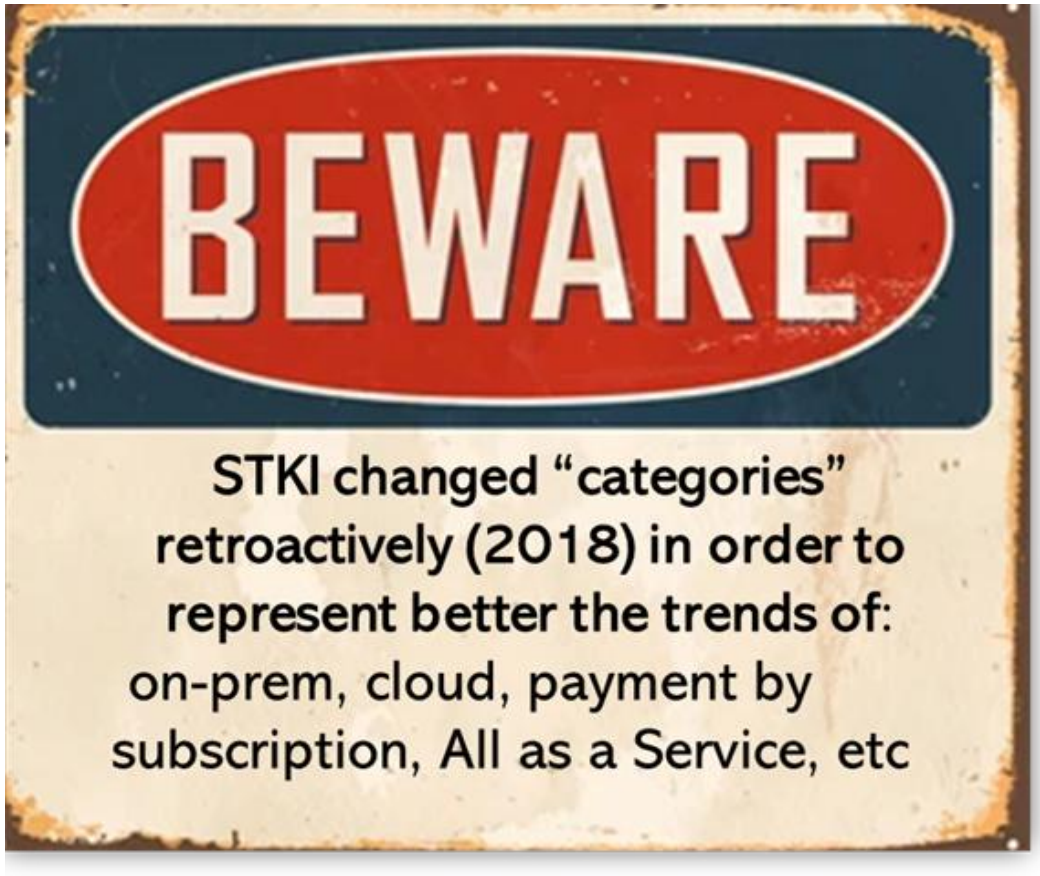
STKI Research Results:



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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?





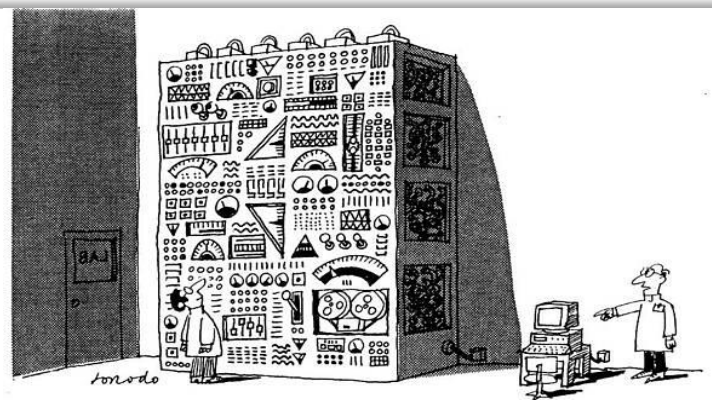
Technology Vendors

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

Integrators

VARs

Users of Technology

Manufacturers / Software Houses



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

BEWARE

STKI changed "categories" retroactively (2018) in order to represent better the trends of: on-prem, cloud, payment by subscription, All as a Service, etc

CATEGORIES

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

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.

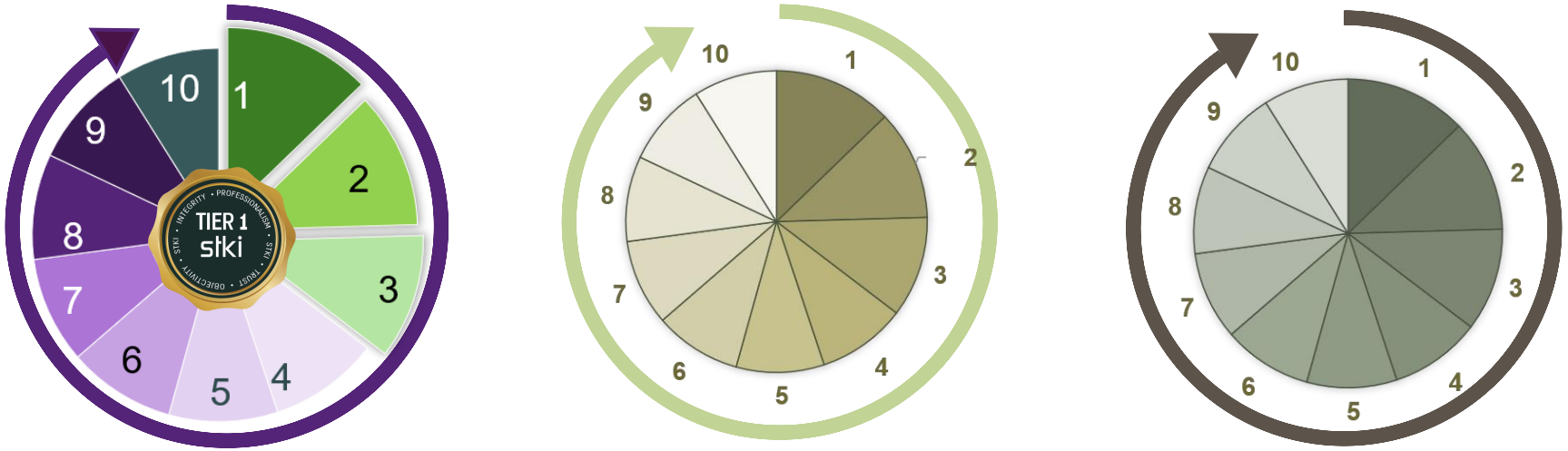


STKI has **signed NDAs** with the vendors (Revenues, Projects) and we tried to **minimize opportunities for reverse engineering of sales/ finance data**



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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Customer engagement and multi channel solutions

Package	Israeli Rep.	Integrators
Glassix	Consist	Consist, Elad, Matrix, I.E Mittwoch, Malam-Team
Commbox	Commbox	Commbox PS
7Twenty	7Twenty	
Consolto video chat		Matrix
Notch	Notch	
Insait	NessPro	Nesspro
Infobip (Marketing)		Be2see (peax group)
Microsoft Multi Channel	Microsoft Israel	Matrix, Elad, abra, Biz Aid, Malam-Team
SF Engagement Cloud	Salesforce Israel	one, Aman, Elad and other SF Integrators
Zoho	Zoho Israel	Tamayo, Holistic, MLY
Twillio	Aman	Aman
Multi channel as part of Contact Center Suite:		Genesys, ACE, Cisco, Avaya etc.

Part of CRM/ Marketing

CPaaS & CC



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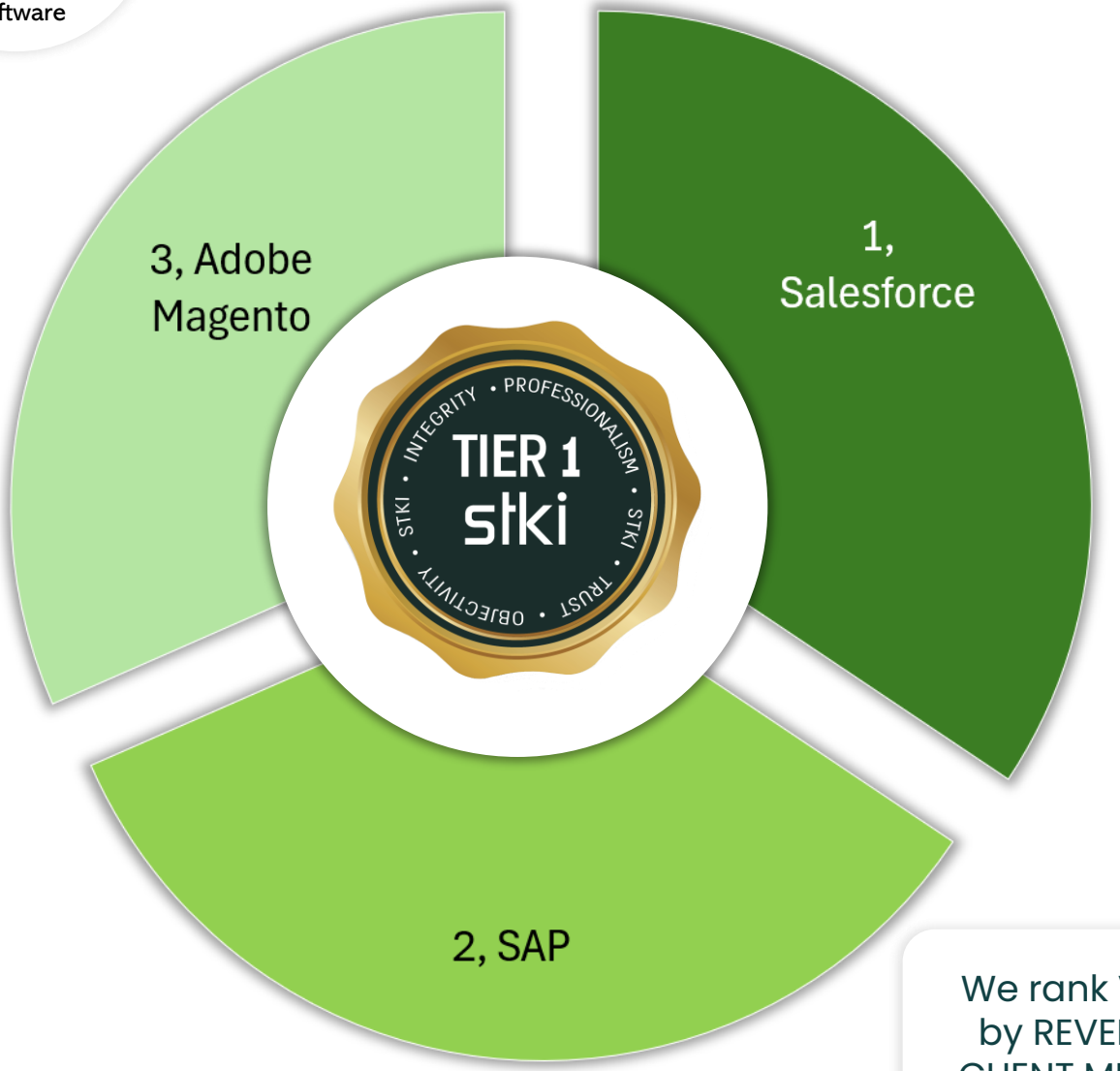
Customer Data Platforms (CDP) Players in Israel

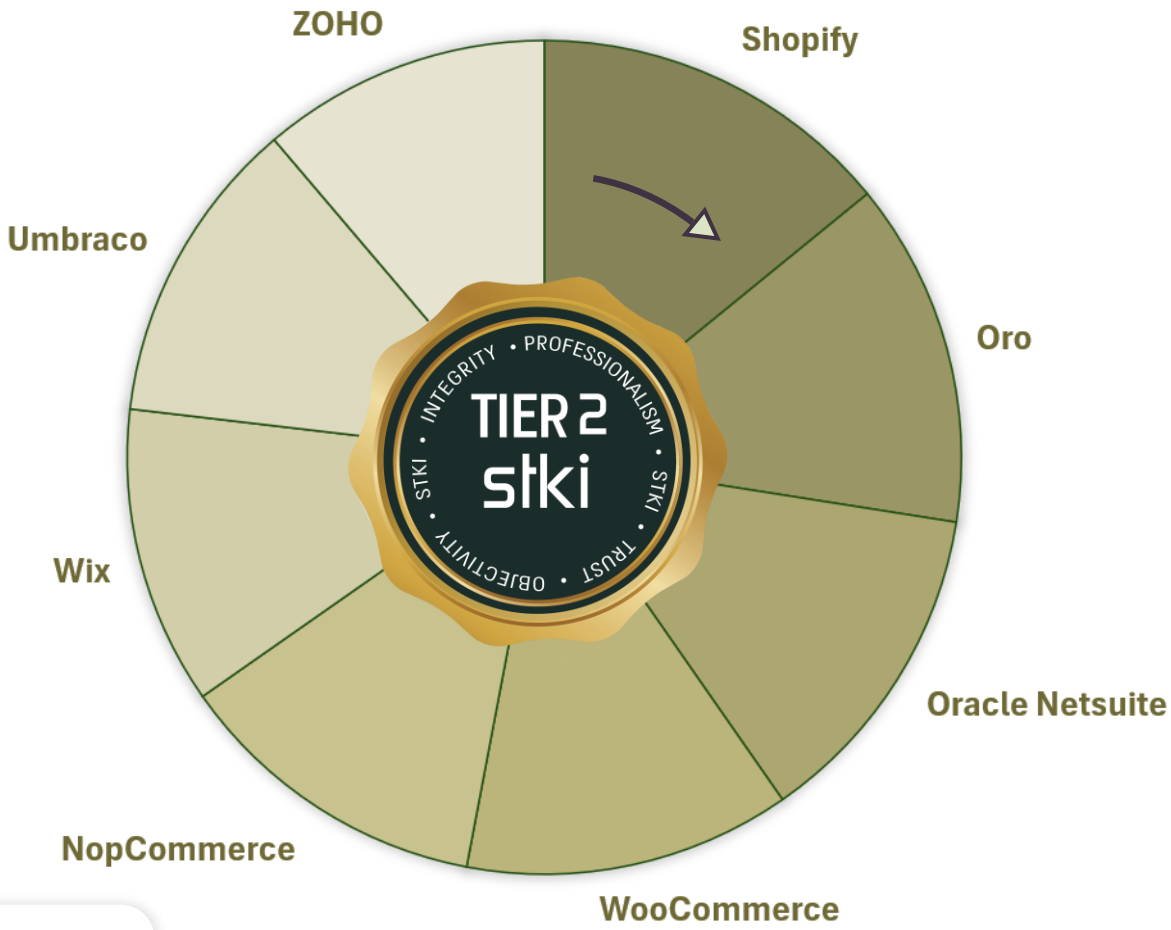
Company	Product	Partners
SAP	CDP & CDC	Be2see (peax group), One Digital, abra, Codeoasis
Adobe	CDP Real Time CDP	Deloitte Israel
Segment (acquired by Twillio)	CDP	aman
Oracle	CX	Oracle Consulting
Microsoft	Customer data Insights	Matrix and other MSFT partners
Salesforce	Data Cloud	Matrix, abra, elad, Yael All Data, BDO (Inferow) Deloiite, aman-Asperi and other SF partners
Optimove	Real-time CDP	Be2See (peax group)

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E-Commerce Platforms

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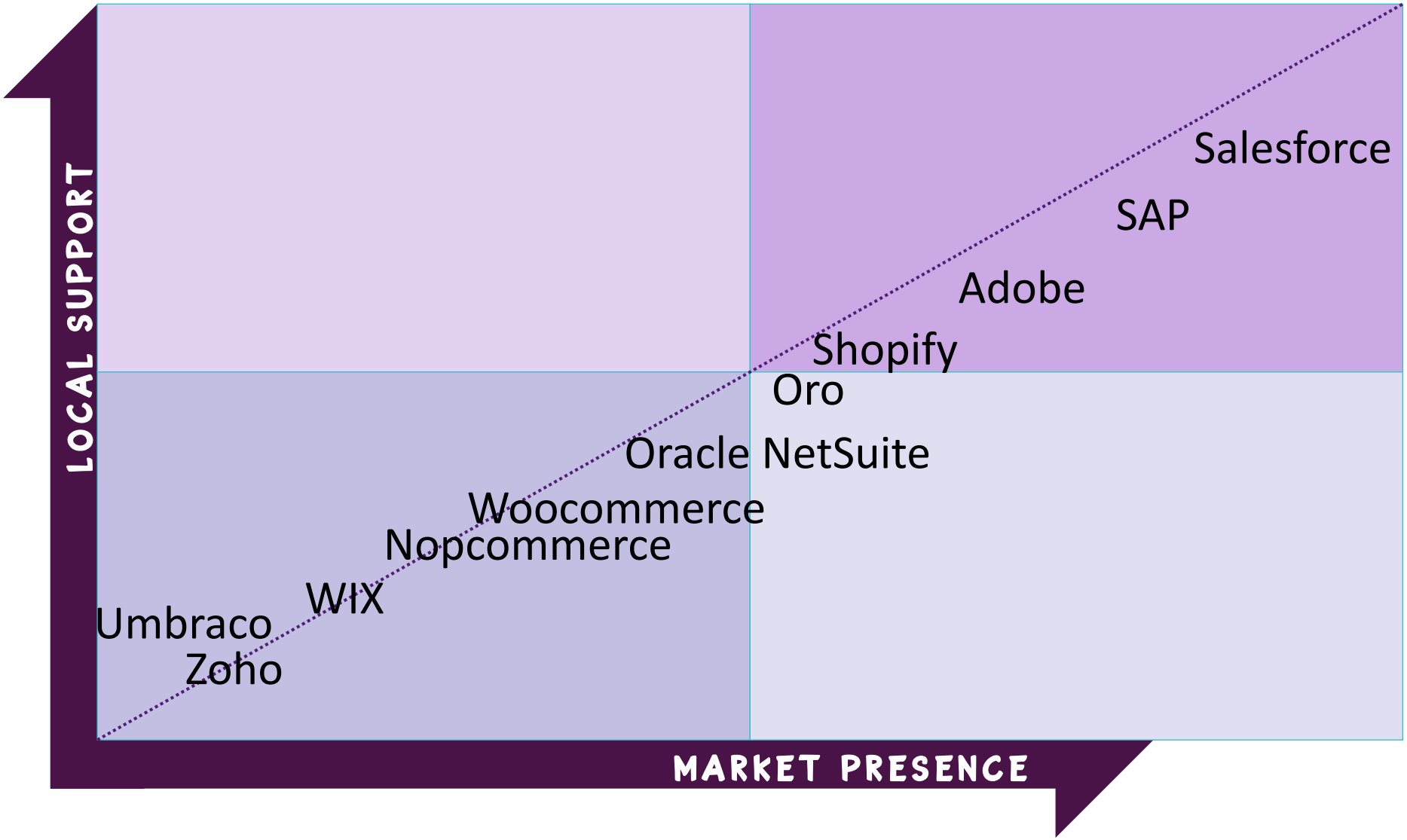
We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Infrastructure

eCommerce - 2026

Presence & Support in Israel



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E-Commerce packages in Israel – Part 1

Package	Rap/Integrators in Israel
SAP Commerce (Hybris), Marketplace	NGSoft, Seidor-Malam Team, SAP, Deloitte, EY, Ideo Digital, Hilan-Ness
Oracle Commerce + Commerce Cloud	Oracle Israel
Salesforce Commerce Cloud	Salesforce, Elad, One1, Deloitte, Bay Bridge, Yael
NetSuite SuiteCommerce	Netcloud, One1, iCloudius, AllCloud, Deloitte , Top Solutions, WinIT
Microsoft Dynamics 365 Commerce	Microsoft Israel
Priority (Retail module)	Priority, Edea
Adobe (Magento)	Elad, Yael, abra, CodeOasis, Matrix, Ideo Digital, Ewave, One1, Malam-Team, Betanet, Signature-IT



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E-Commerce packages in Israel – Part 2

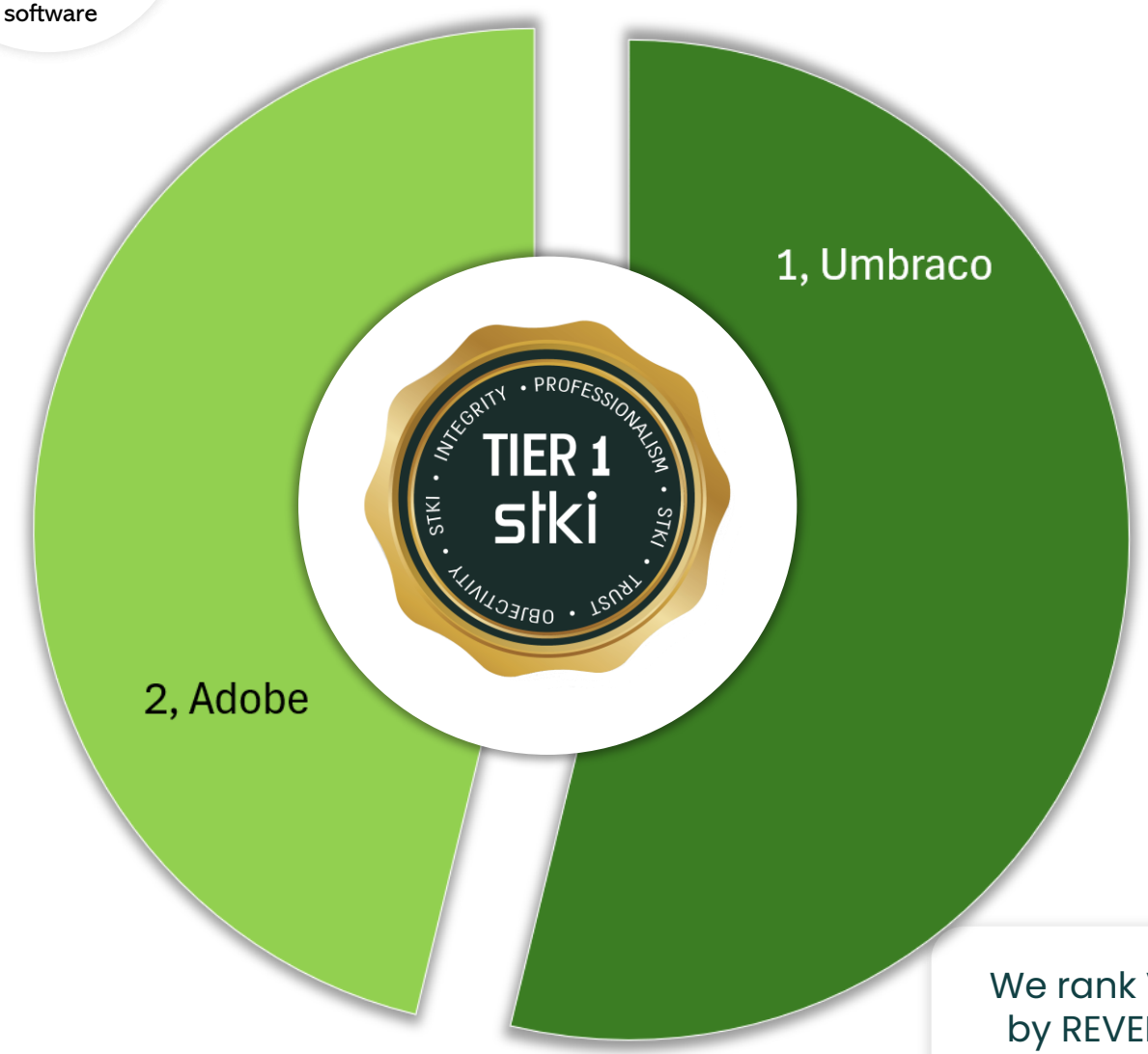
Package	Rap/Integrators in Israel
NopCommerce	Ideo Digital, Matrix, NGSoft, Malam-Team
Shopify	Elad, IdeoDigital, Girit Interactive, Ewave
WooCommerce (WordPress)	Girit Interactive, SignatureIT, Junami, Ewave, Coral, SITEL, Matrix, Zigit(SQLink), Yael
Umbraco Commerce	Elad, Hilan-Ness, Aman, Ewave, Matrix, Tvuna(SQLink), Yael
Site Vision	Malam-Team (Pionet)
Akeneo (PIM)	Elad
Oro	abra, Yael, Elad

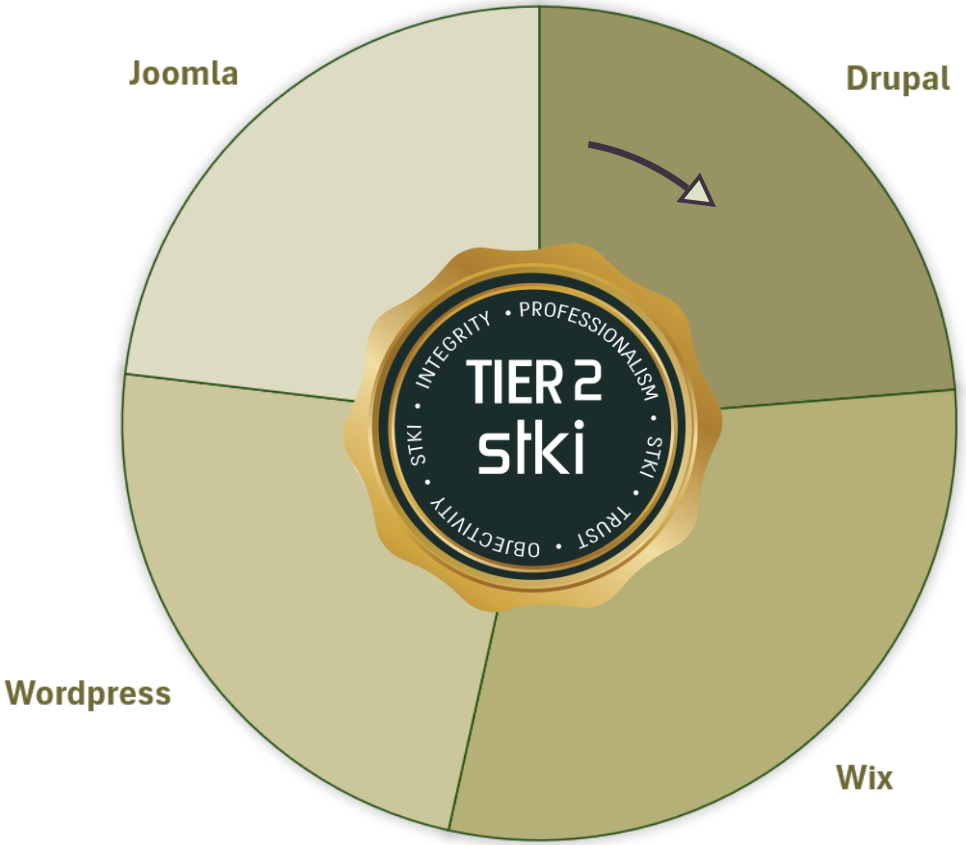


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Web Content Management Platforms





We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Business Application Systems 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
Blockchain platforms	5	6%	5.3	9%	5.8	-66%	2	50%	3	67%	5	40%	7	29%	9	33%	12
GIS Platforms	42.5	4%	44	2%	45	4%	47	4%	49	12%	55	15%	63	13%	71	6%	75
IOT tools and platforms	5	60%	8	25%	10	50%	15	27%	19	5%	20	10%	22	9%	24	17%	28
TOTALS	52.5	9.14%	57.3	6.11%	60.8	5.26%	64	10.94%	71	12.68%	80	15.00%	92	13.04%	104	10.58%	115

Values in Million USD

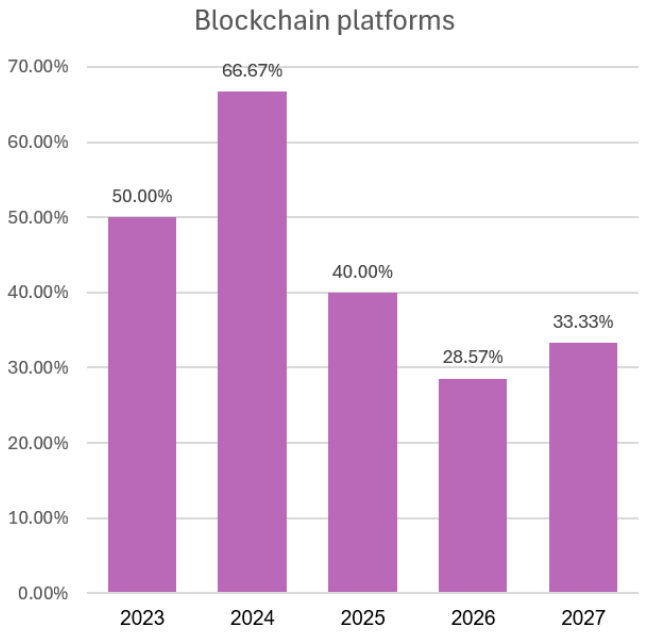


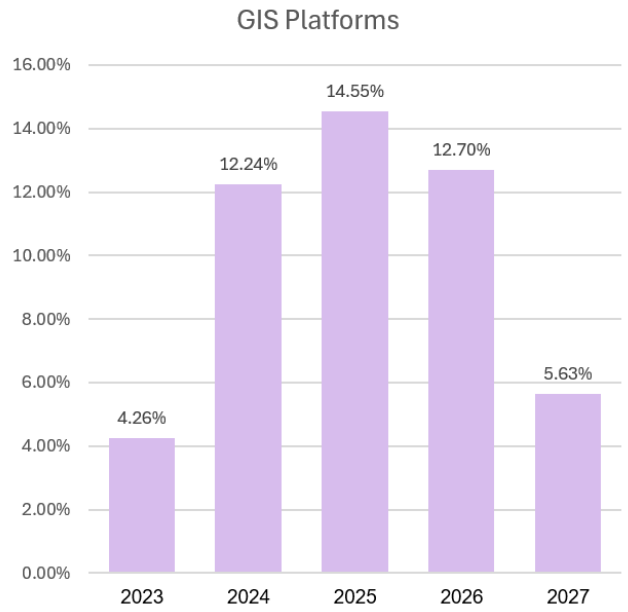
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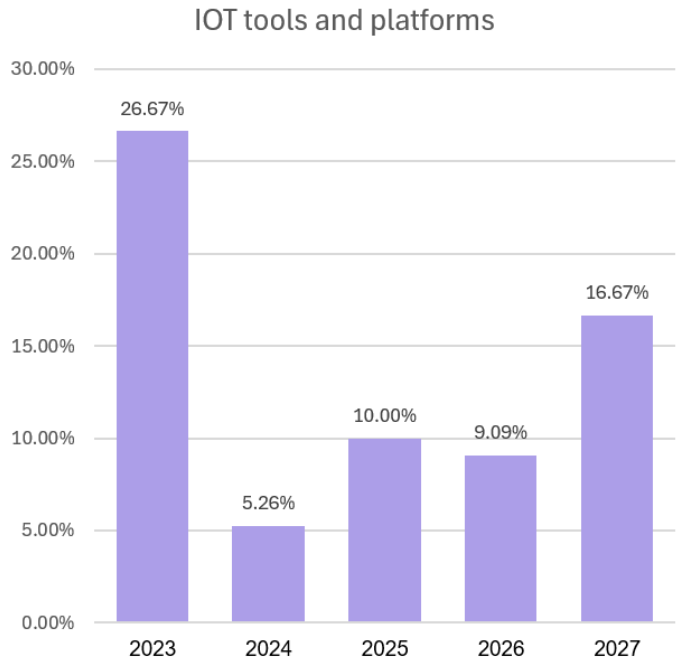
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Business Application Systems Market 2022-2026





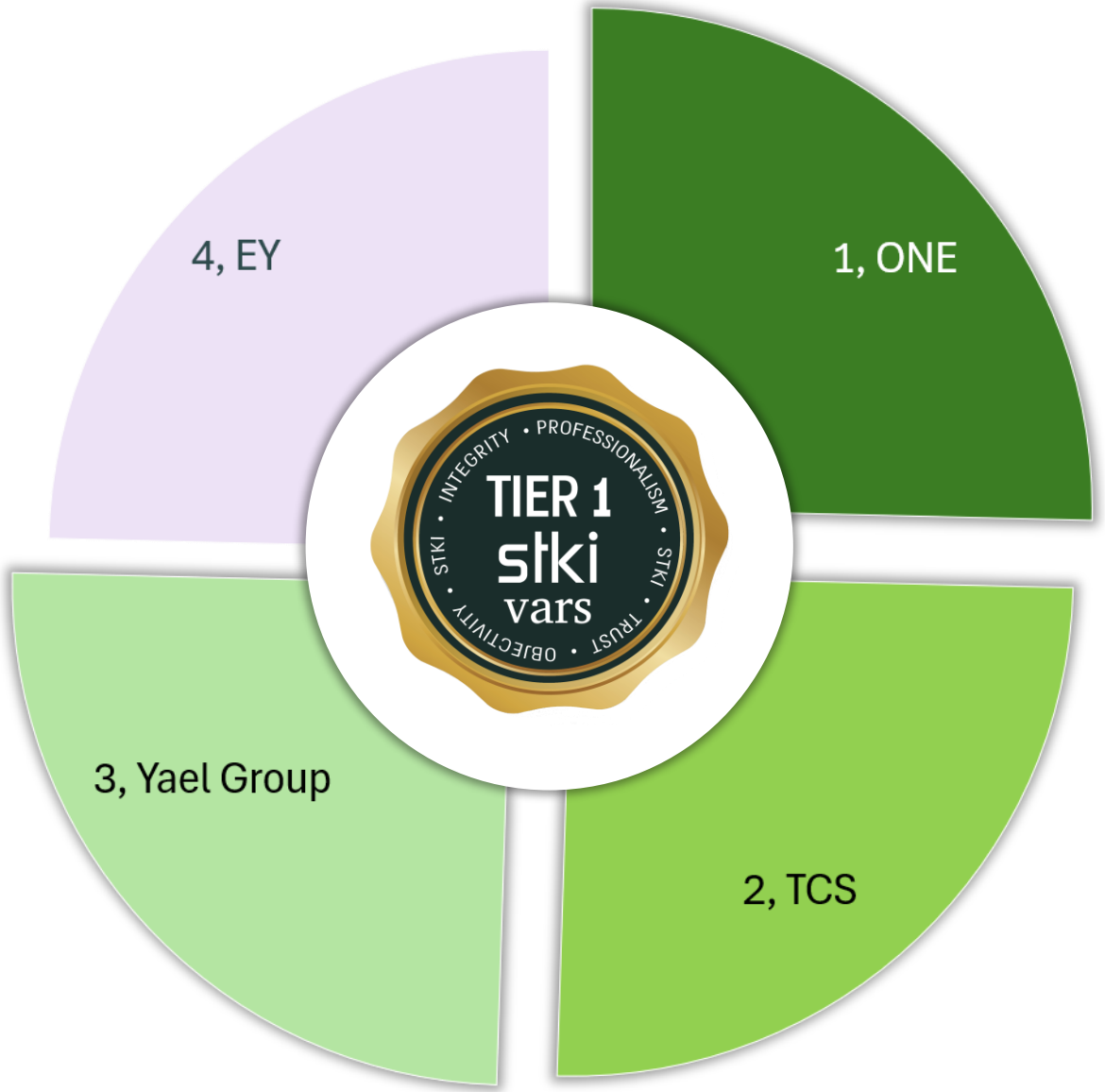


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Blockchain Platforms & VARs

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We rank VENDORS by REVENUE and CLIENT MINDSHARE

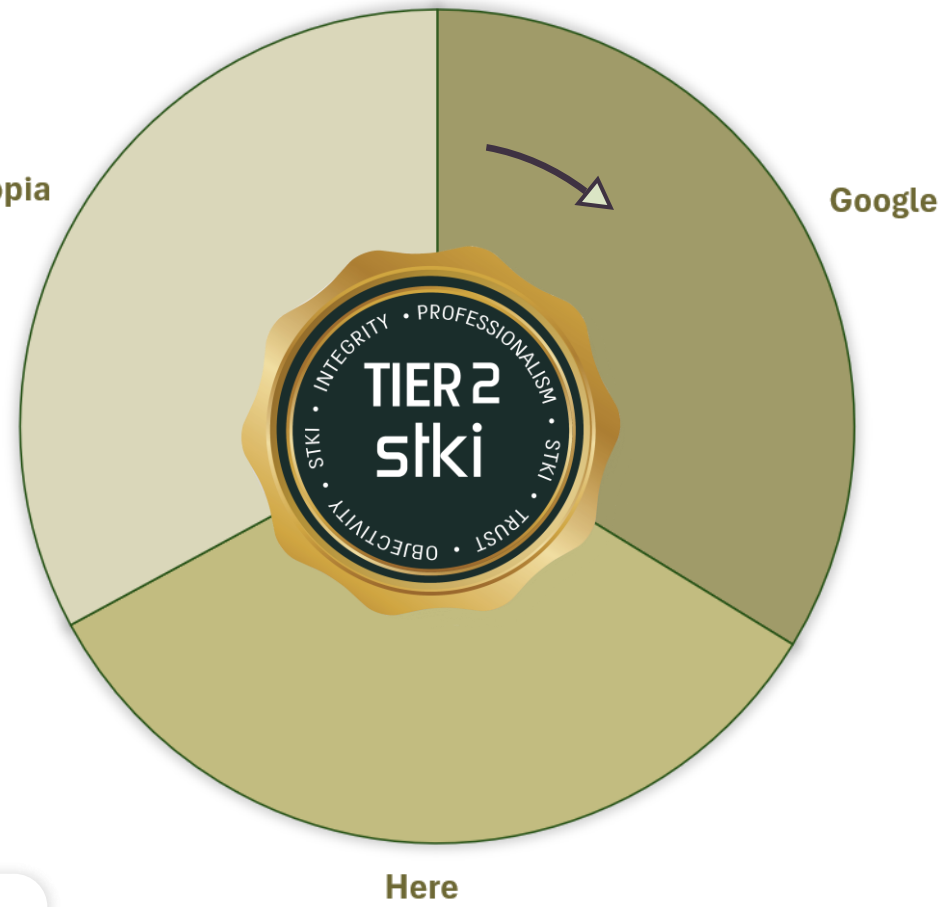


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GIS Platforms





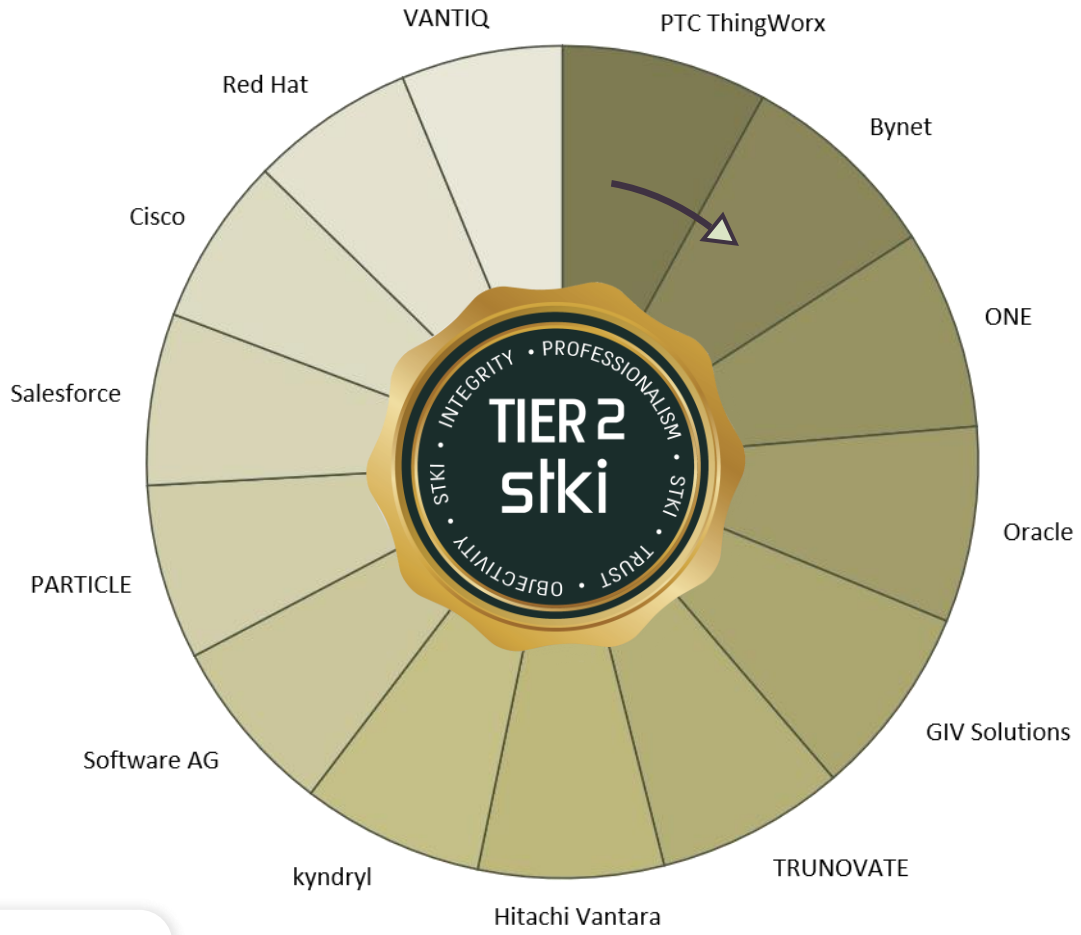
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IoT Tools and Platforms

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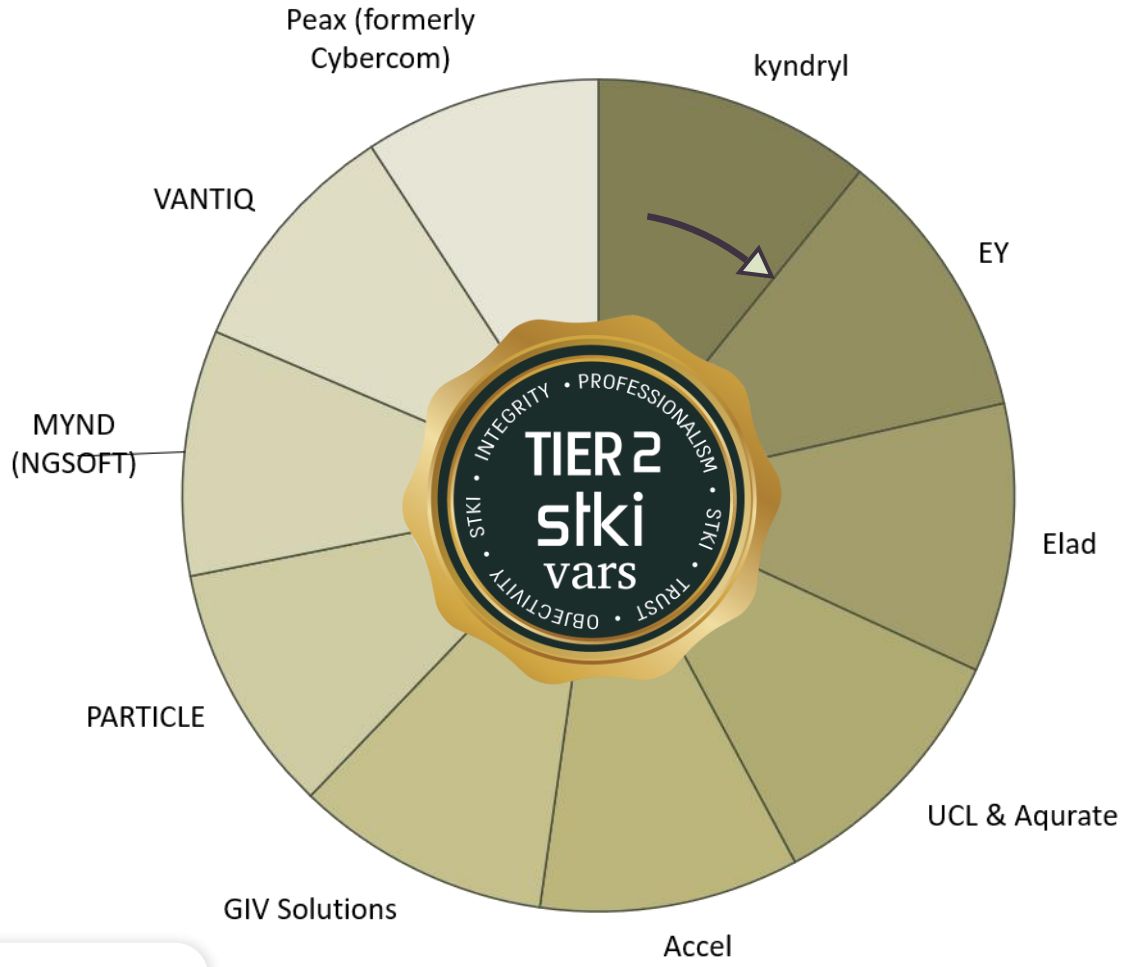
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IoT Tools and Platforms VARs





We rank VENDORS by REVENUE and CLIENT MINDSHARE

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Automation and AI 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
RPA Platforms	23	17%	27	26%	34	12%	38	18%	45	-11%	40	-13%	35	-14%	30	-17%	25
Generative AI tools and platforms									56	7%	60	17%	70	7%	75	7%	80
Agentic AI tools and platforms													30	40%	42	79%	75

Values in Million USD

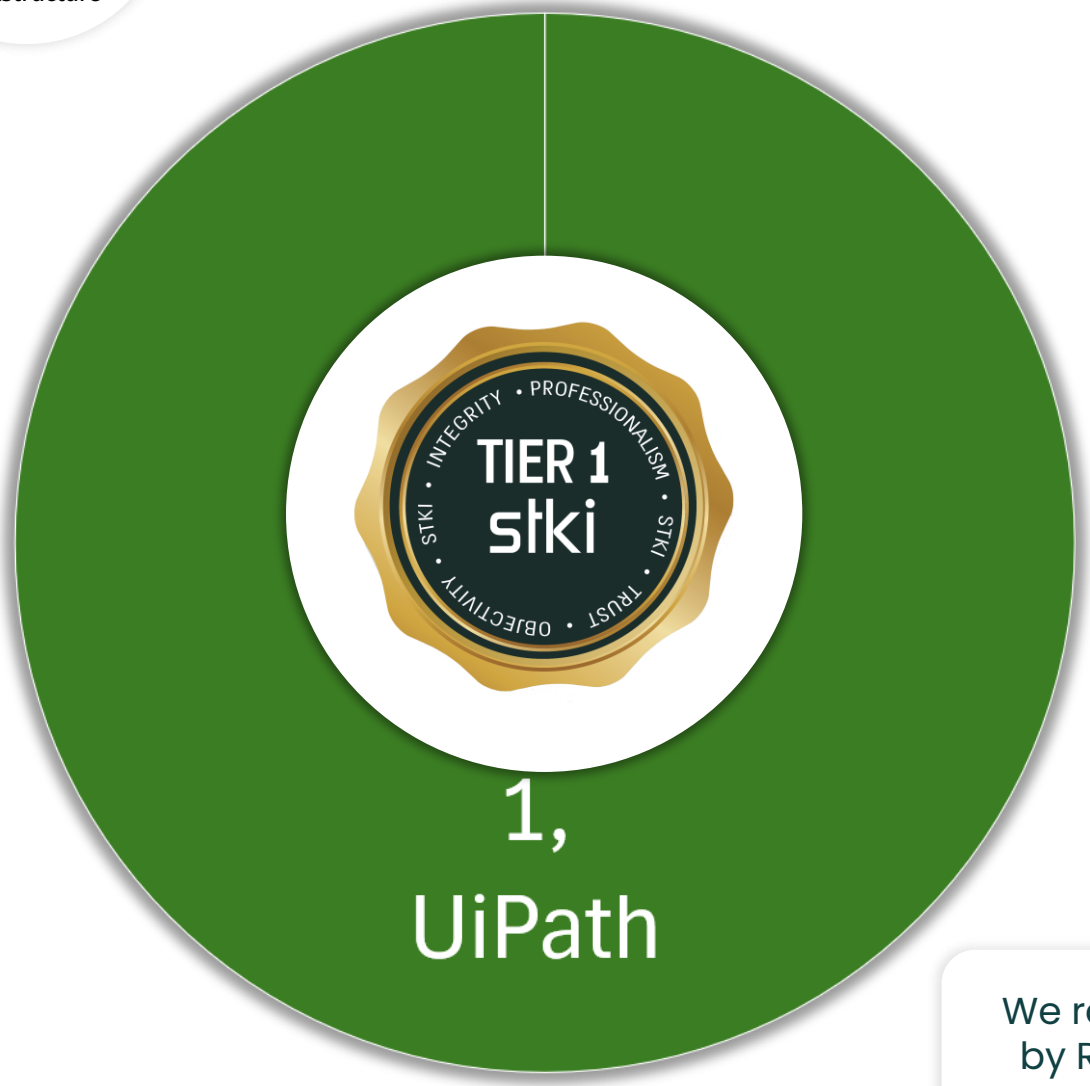


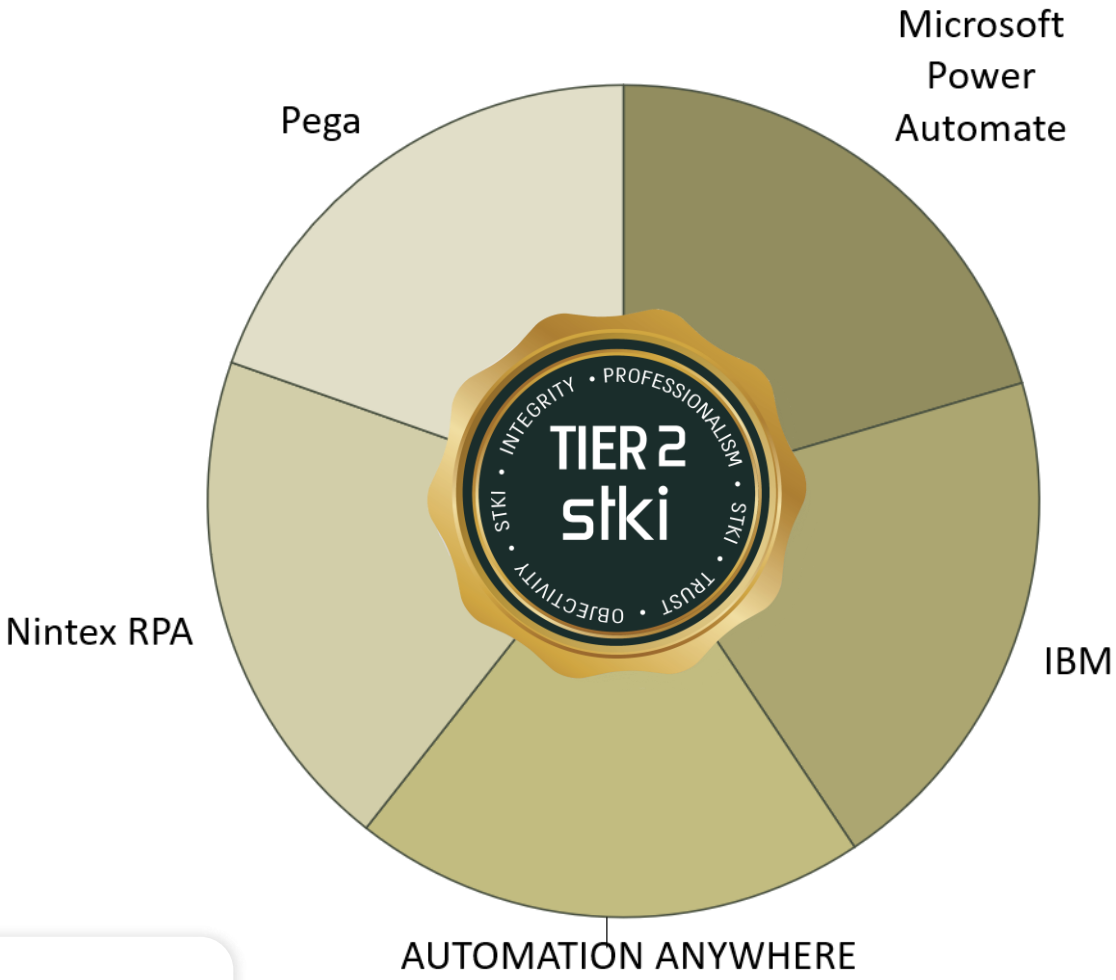
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Infrastructure

RPA Platforms





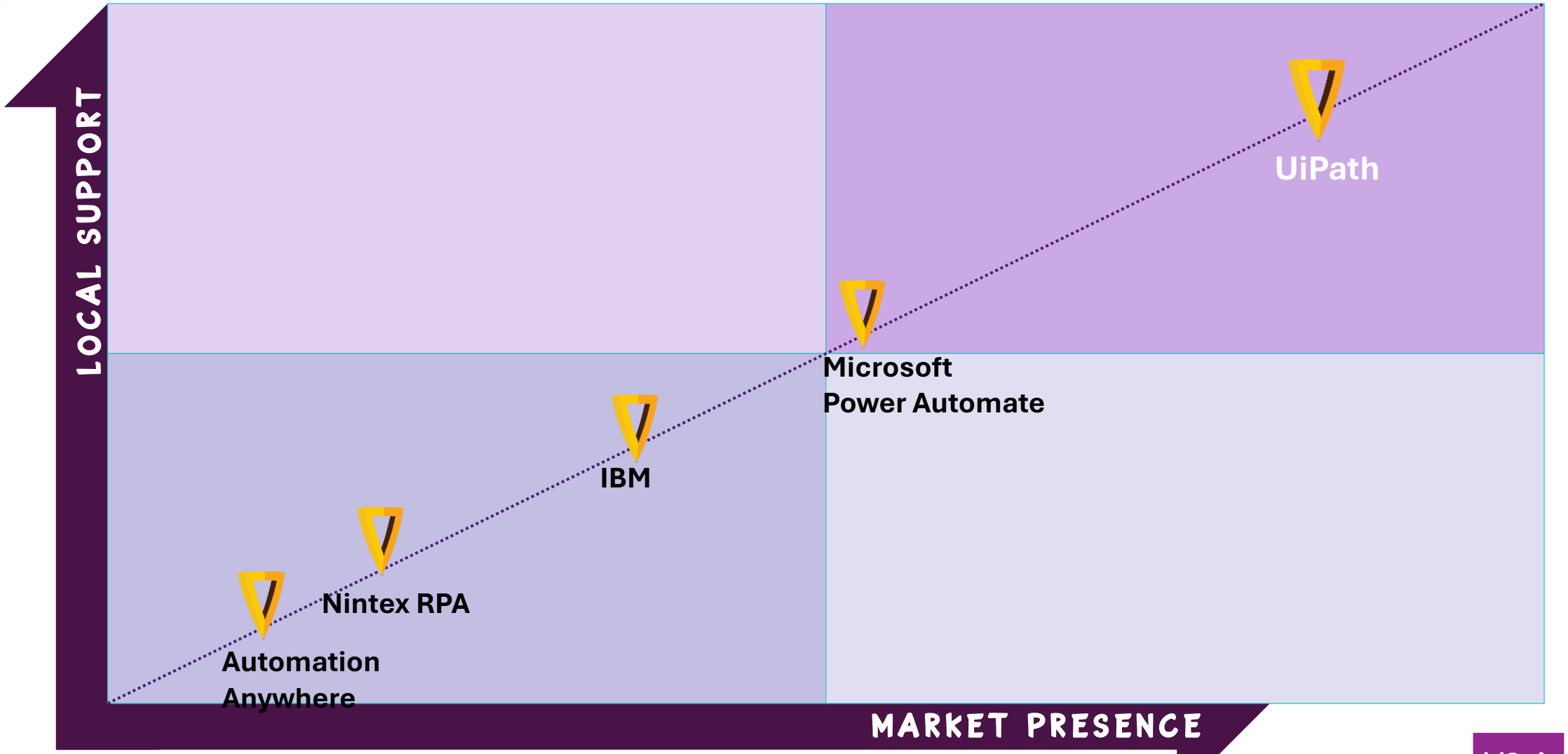
We rank VENDORS by REVENUE and CLIENT MINDSHARE

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RPA Israeli Market Positioning– 2026/7

Presence & Support in Israel



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RPA Tools & Integrators in Israel 2026-7

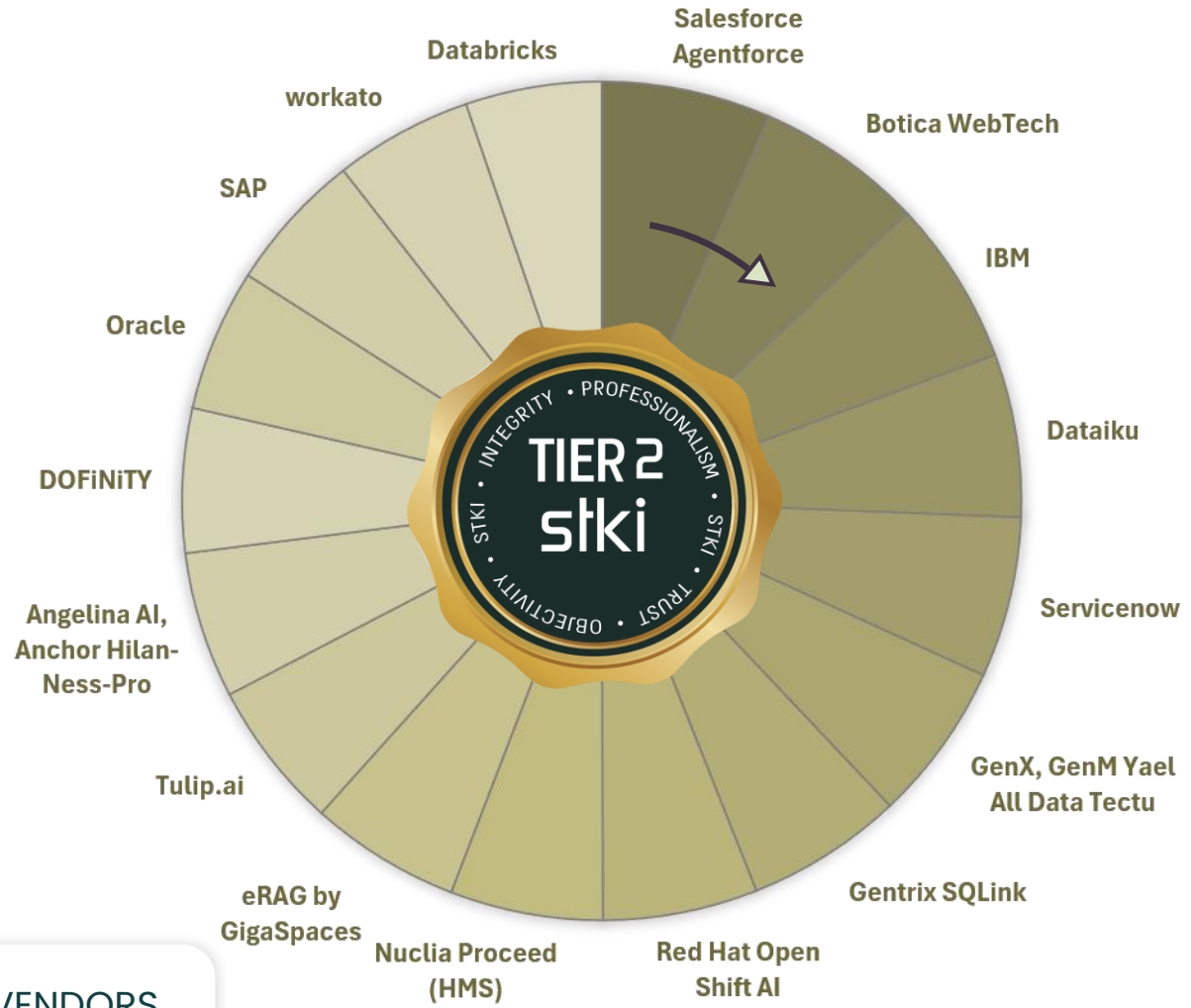
	Integrators
UiPath	HMS, Bynet, EzROI, Valor, ABP, KPMG, Ness, Aman, Matrix
Microsoft RPA (Power Automate)	Malam, Matrix, Ness, Elad, KPMG, Valor, BizAid
Nintex RPA (Formerly Kryon)	Galil Software, EY, KPMG, EZ ROI, Matrix
IBM RPA (Cloud Pak for Business Automation)	IBM Expert Labs, ABP, Malam, Matrix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

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GenAI and Agentic AI Tools and Platforms





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Multi-Agent System Frameworks and Orchestrators in Israel 2026/7
Part 1: Developer Frameworks & Open Source

Product / Vendor	Description	Platform	Solutions	Rep / Partners in Israel
LangChain / LangGraph	Stateful framework, build complex WFs with graph nodes & conditional logic	X		Open Source
CrewAI	Enterprise-ready, role-based agent teams orchestration framework (researcher, writer, etc.)	X		Open Source
Claude Agent SDK	Anthropic's official SDK powering Claude Code; features robust primitives for tool use, subagents, and MCP integration	X		Anthropic / Open Source
AutoGen / AG2	Microsoft Research's multi-agent conversation framework	X		Open Source
Semantic Kernel (SK)	Microsoft's other open-source offering: enterprise AI orchestration SDK with C#, Python, and Java parity. The best fit when your enterprise lives on .NET / Azure and needs Microsoft-grade support	X		Open Source / Microsoft



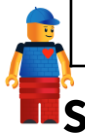
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Multi-Agent System Frameworks and Orchestrators in Israel 2026/7
Part 2: Cloud Players and Enterprise AI Platforms

Product / Vendor	Description	Rep / Partners in Israel
Microsoft AI Foundry & Copilot Studio	Leading governance and multi-agent management platform deeply embedded within the Microsoft ecosystem	Microsoft Israel, KPMG, Kyndryl, Malam-Team, EY
Google Gemini Enterprise Agent Platform	Lifecycle management for multimodal agents, A2A communication protocol	Yael all Data, Kyndryl, KPMG, Malam-Team, Commit
Amazon Bedrock (AgentCore)	Supervisor-driven agent orchestration featuring natural language policy definition and secure enterprise execution	Amazon Israel, Kyndryl, Malam-Team, Commit
IBM Watson Orchestrate & Governance	Orchestration of hundreds of ready-made "Skills", robust auditing & On-Premise option	IBM, Matrix, ONE, Malam-Team, Yael, Commit, Elad, ABP, others
Red Hat Open Shift AI	Open-source foundation for scaling, serving, and monitoring models and multi-agent workflows across hybrid and multi-cloud environment	IBM, Matrix, Malam Team, ONE, Commit, Bynet, others
Oracle OCI Generative AI	Managed service fine-tuning and hosting for agent enterprise backend	Oracle Israel, Matrix, SangIT



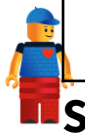
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Multi-Agent System Frameworks and Orchestrators in Israel 2026/7
Part 3: Enterprise Automation & Pure-Play Solutions

Product / Vendor	Description	Platform	Solutions	Rep / Partners in Israel
Jeen.ai	Agnostic Enterprise AI, Multi-agent No-code Orchestration & FinOps budget control	X	X	Jeen.ai, EY, ONE (OneCity)
Wonderful	Enterprise AI Platform with custom applications, productizing developer frameworks into secure, tailored enterprise solutions	X	X	Wonderful (Direct) Deloitte, KPMG
UiPath (Maestro)	Multi-agent Orchestrator, that bridges, logs, and optimizes workflows connecting RPA bots, agents, and human workers	X	X	UiPath Israel, HMS, Valor, Bynet, Matrix and others
Workato	iPaaS Enterprise integration platform orchestrating autonomous agents across thousands of pre-built app APIs	X	X	Workato, Matrix
AiQ (Kal-Sense)	Turning unstructured media/audio into agent teams, specialized in On-Prem/Hybrid	X	X	Kaleidoo by Bynet
Gentrix.ai	Conversational agent layer that transforms static online forms and complex backend APIs into fluid, end-to-end user services	X	X	SQLink
GenX	Agentic platform tailored for automated digital engagement, conversational workflows, and customer interaction orchestration	X	X	Yael All Data (Tectu)
GenM	Secure enterprise AI platform tailored for managed LLM access, multi-source org knowledge integration (RAG), and governed AI agent orchestration	X	X	Yael All Data (Tectu)



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Multi-Agent System Frameworks and Orchestrators in Israel 2026/7
Part 3- Continuation: Enterprise Automation & Pure-Play Solutions

Product / Vendor	Description	Platform	Solutions	Rep / Partners in Israel
Botica (WebTech)	Enterprise Agentic platform for autonomous workflow automation, virtual assistants, and data integration	X	X	WebTech, Matrix, BDO, Tefen
Nuclia	AI-powered search, indexing, and unstructured data extraction tailored for automating enterprise knowledge retrieval and RAG integration	X	X	Proceed (HMS), others
Dataiku	Enterprise platform to design, deploy, and govern data pipelines and multi-agent workflows, featuring a secure LLM gateway to control costs, routing, and safety guardrails at scale	X	X	Matrix, Bynet, One, Big 4, others
Angelina AI	Governed enterprise system for deploying role-based vertical "Virtual Employees" (HealthTech, Academy, HR) with built-in compliance, and human-in-the-loop	X		Hilan-Ness-Pro
Anchor	Computer-use agents (digital browsing)		X	Hilan-Ness-Pro

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Multi Agent System Frameworks and Orchestrators in Israel 2026/7
Part 4: Embedded Enterprise Applications (SaaS, ERP & CRM Built-in Agents)

Product / Vendor	Description	Platform	Solutions	Rep / Partners in Israel
Salesforce (Agentforce)	Native business application agents directly tied into the Salesforce CRM and customer Data Cloud ecosystem	X	X	Deloitte, Abra, Allcloud, ELAD, Aman, PWC and all SF integrators are getting into this
ServiceNow (Agent Fabric)	Low-Code Multi-Agent framework for enterprise service workflows and IT operations	X	X	ServiceNow Israel, ONE (Dicomano), Bynet, Deloitte
SAP (Joule & AI Foundation)	Built-in copilot utilizing SAP Datasphere semantic layer for business logic agents	X	X	SAP, Malam-Team, Matrix
Monday.com	Monday offers an orchestrator that lives within Monday's agent environment and relies on the data stored within this environment	X	X	monday.com, KPMG, One twodo, and local monday.com integrators
Oracle OCI Generative AI	Managed service fine-tuning and hosting for agent enterprise backend	X		Oracle Israel, Matrix, SangIT
Additional Enterprise Applications (CRM, ERP, etc. – e.g., Microsoft, Zoho, and others)				



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Industry Specific and Special Purpose Applications 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
Manufacturing & distribution software (WMS, transportation, etc)	40	13%	45	7%	48	4%	50	8%	54	7%	58	10%	64	9%	70	14%	80
Financial software (banking, insurance and other financial market software)	51	2%	52	6%	55	18%	65	8%	70	21%	85	18%	100	6%	106	6%	112
Military Software (digital apps , analytics, etc)		#DIV/0!		#DIV/0!		#DIV/0!	20	150%	50	50%	75	33%	100	20%	120	25%	150
Retail Management Software	26	15%	30	17%	35	14%	40	50%	60	17%	70	11%	78	5%	82	4%	85
Healthcare Related Software	37	8%	40	13%	45	22%	55	18%	65	15%	75	19%	89	12%	100	10%	110
Education Digital Software	20	25%	25	20%	30	17%	35	29%	45	20%	54	20%	65	20%	78	9%	85
TOTALS	174	10.34%	192	10.94%	213	24.41%	265	29.81%	344	21.22%	417	18.94%	496	12.10%	556	11.87%	622

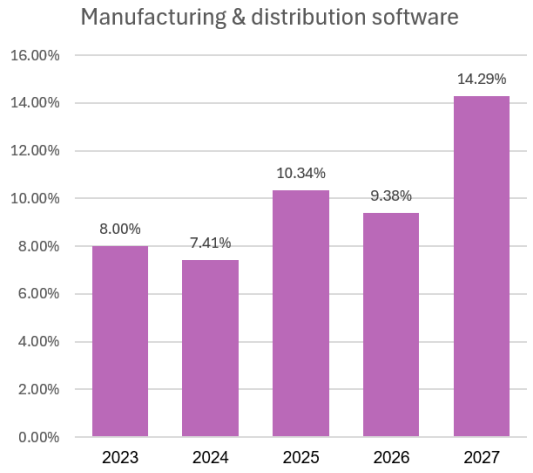
Values in Million USD

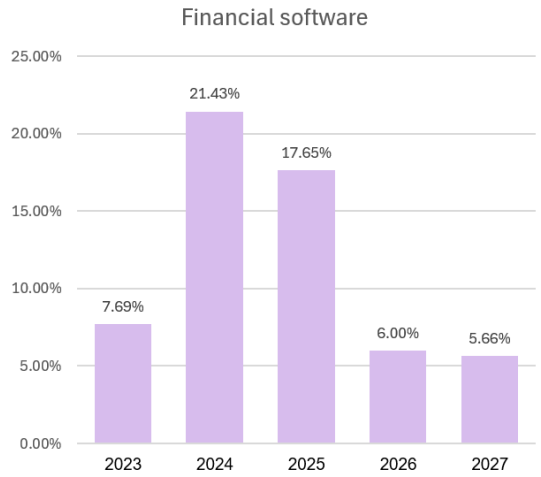


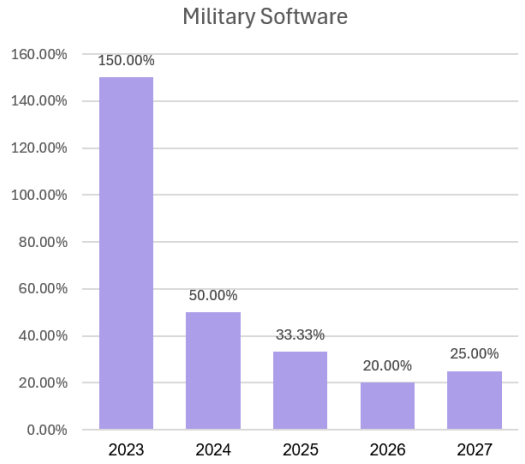
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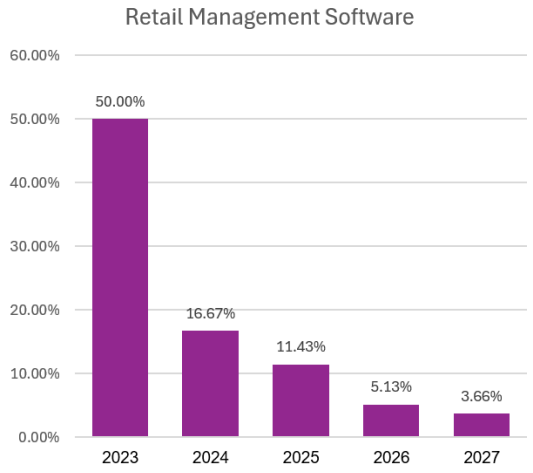
software

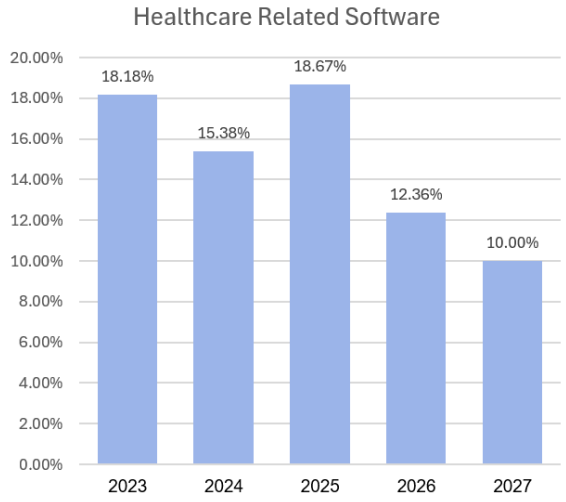
Industry Specific and Special Purpose Applications Market 2022-2026

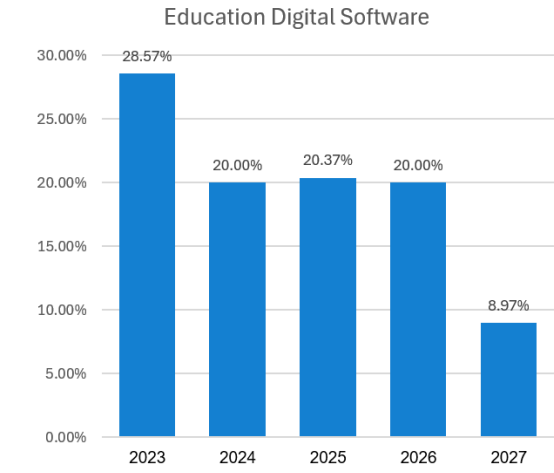












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Israel

Value Added Services Markets 2025 ”vendor rankings”





Dr. Jimmy Schwarzkopf



Galit Fein



Einat Shimoni



Pini Cohen



Reut Shefer Bar

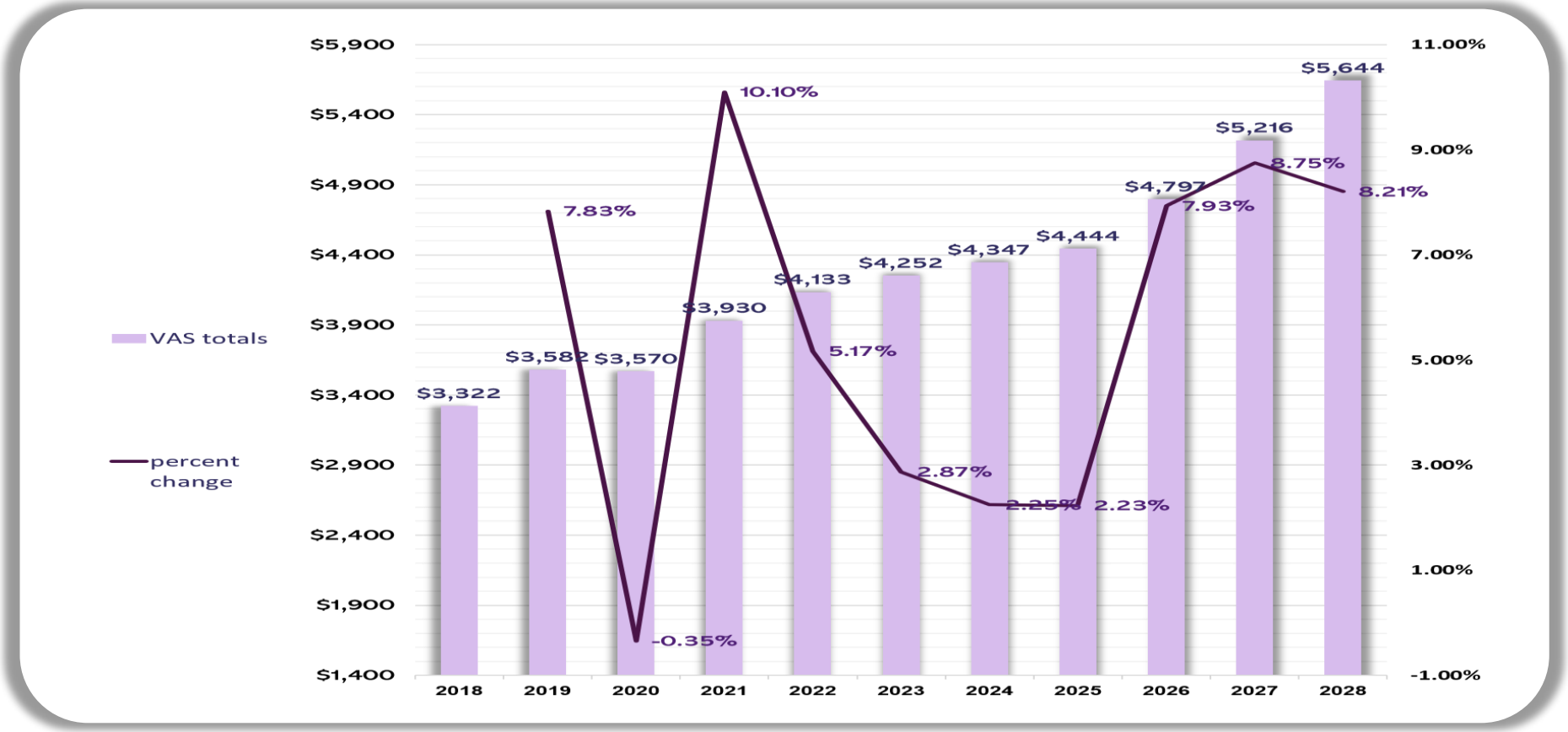


GenAI Analyst

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value added services

Value Added Services Market 2020-2028



	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
VAS totals	$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
percent change		7.83%	-0.35%	10.10%	5.17%	2.87%	2.25%	2.23%	7.93%	8.75%	8.21%

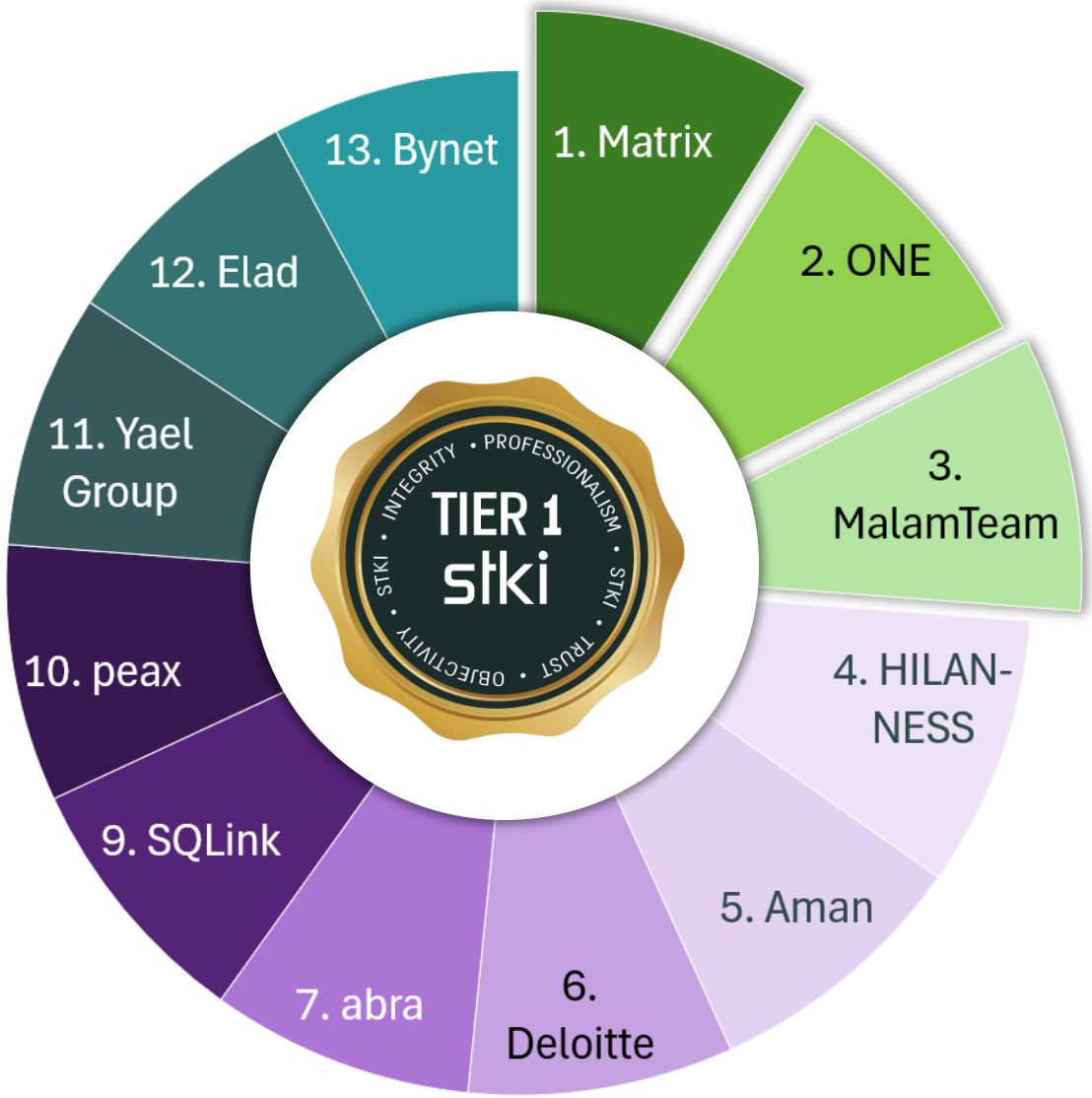
Values in Million USD

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value added services

TOP VENDORS: Value-Added Services Markets

We rank VENDORS by REVENUE and CLIENT MINDSHARE



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value added services

VAS CATEGORIES (pages)

Consulting	
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3rd party maintenance	
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Infra Projects on-prem	
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Cloud Infra Projects	
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Project mgmt. & development tools	
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Enterprise swre implementation	
Page:	411

Data, analytics & BI	
Page:	421

Business applications (dev & implementation)	
Page:	429

Industry specific & Special purpose	
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Engagement & Knowledge management	
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Innovation Projects	
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Testing, Training, Fruition & Hatmaa	
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Automation & AI projects	
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EGRC & Regulation	
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Outsourcing & Managed Services	
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value added services

"Enterprise" Consulting 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
IT Strategy Consulting	33	12%	37	11%	41	-5%	39	-36%	25	-12%	22	14%	25	12%	28	7%	30
Organizational Transformation Consulting	18	28%	23	9%	25	-4%	24	-17%	20	-5%	19	21%	23	17%	27	11%	30
Data & AI Strategy Consulting	16	13%	18	17%	21	19%	25	-20%	20	15%	23	22%	28	21%	34	12%	38
IT Infrastructure & Cloud Consulting	18	28%	23	22%	28	-11%	25	8%	27	15%	31	13%	35	11%	39	8%	42
Application Projects Consulting	28	11%	31	6%	33	-9%	30	-17%	25	-8%	23	-9%	21	10%	23	9%	25
Customer Experience & Digital Consulting - doesn't include UX	30	13%	34	12%	38	-8%	35	-6%	33	-9%	30	-7%	28	14%	32	3%	33
AI Automation & Agentic Consulting		#DIV/0!		#DIV/0!	4	50%	6	67%	10	30%	13	15%	15	27%	19	21%	23
PMO/ OCIO Consulting	18	39%	25	-4%	24	-17%	20	-10%	18	-6%	17	12%	19	11%	21	10%	23
Cyber Security Consulting	80	6%	85	6%	90	11%	100	10%	110	14%	125	4%	130	3%	134	4%	140
TOTALS	241	14.52%	276	10.14%	304	0.00%	304	-5.26%	288	5.21%	303	6.93%	324	10.19%	357	7.56%	384

Values in Million USD



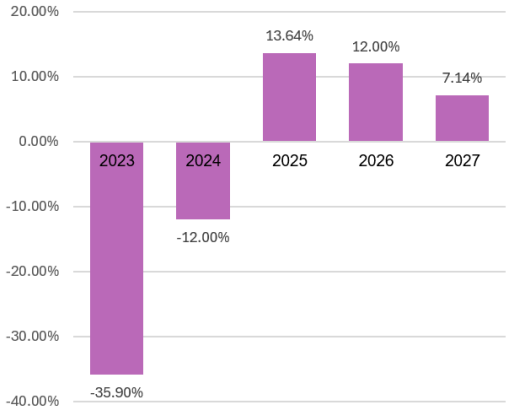
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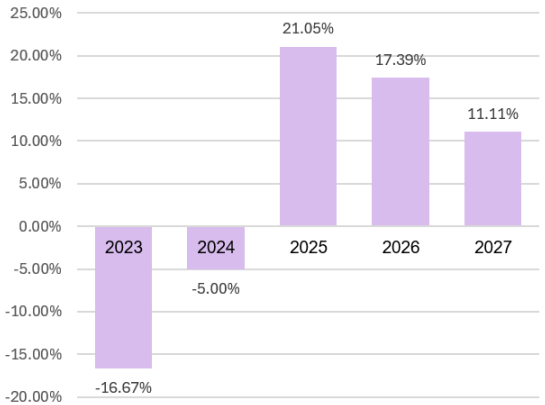
value added services

"Enterprise" Consulting Market 2022-2026

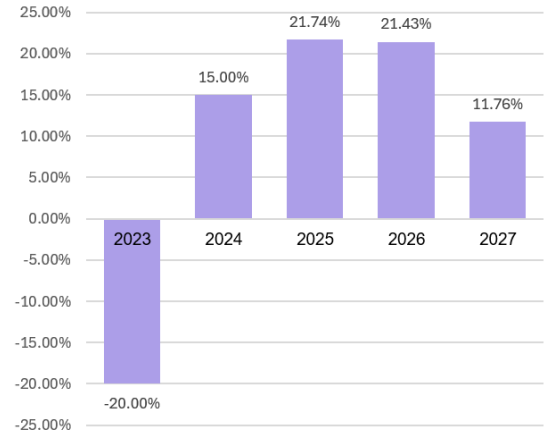
IT Strategy Consulting



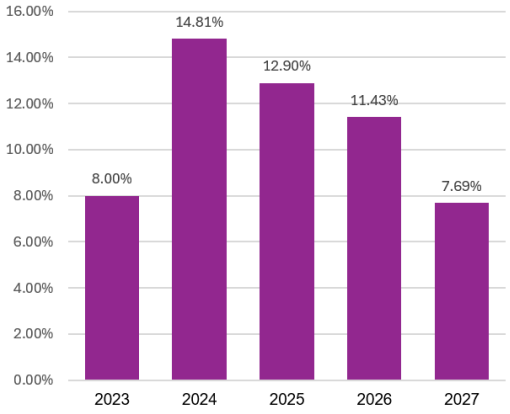
Organizational Transformation Consulting



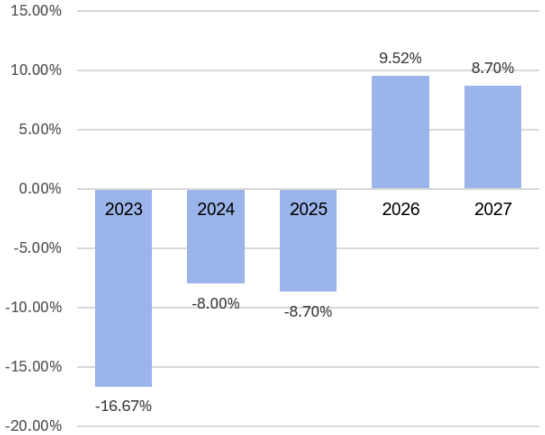
Data & AI Strategy Consulting



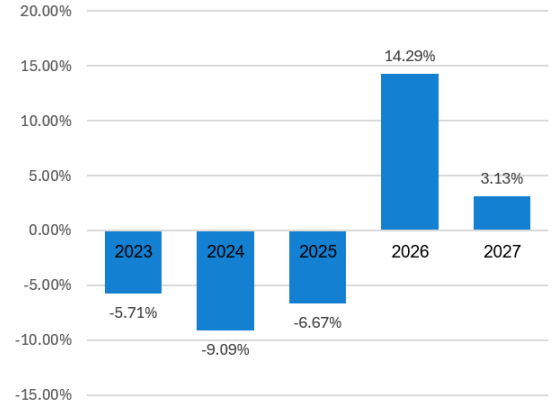
IT Infrastructure & Cloud Consulting



Application Projects Consulting



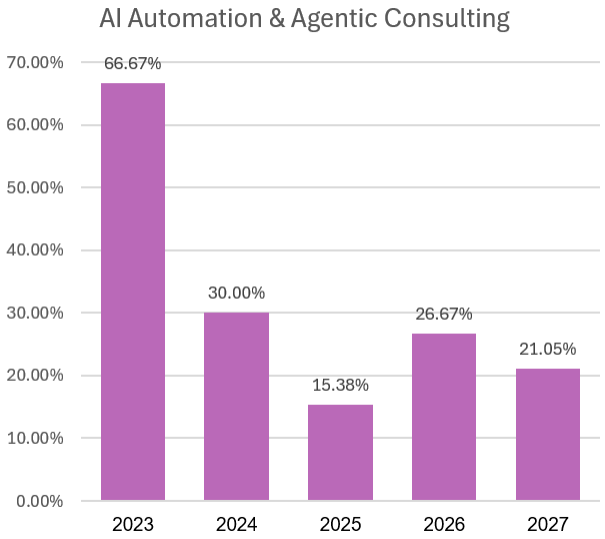
Customer Experience & Digital Consulting
- doesn't include UX

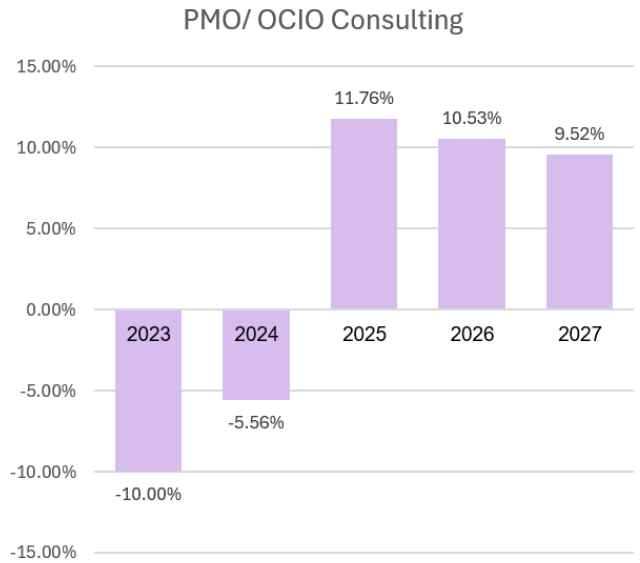


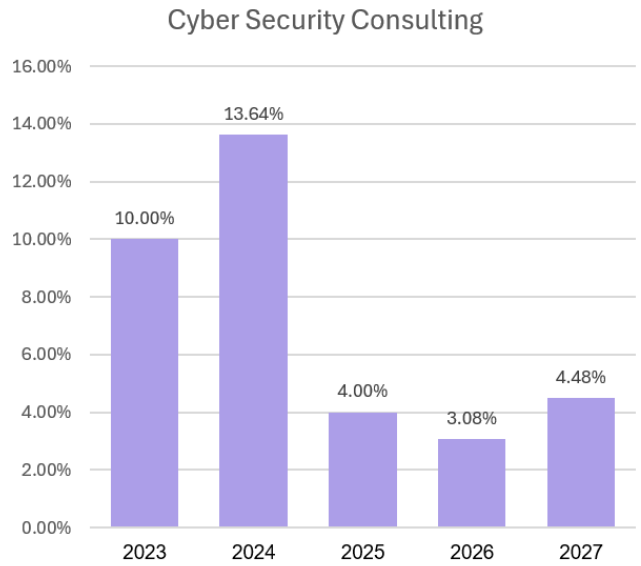
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value added services

"Enterprise" Consulting Market 2022-2026



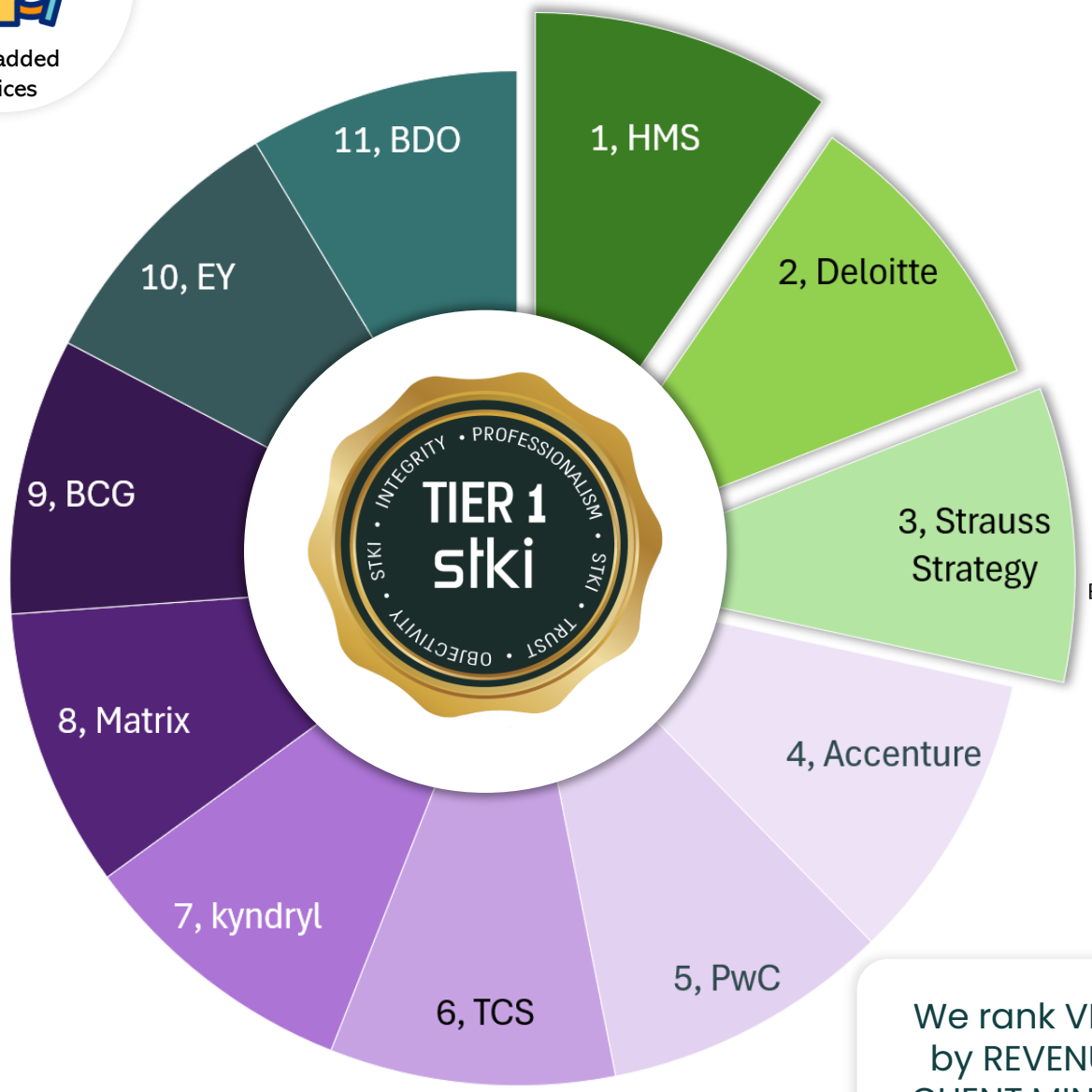


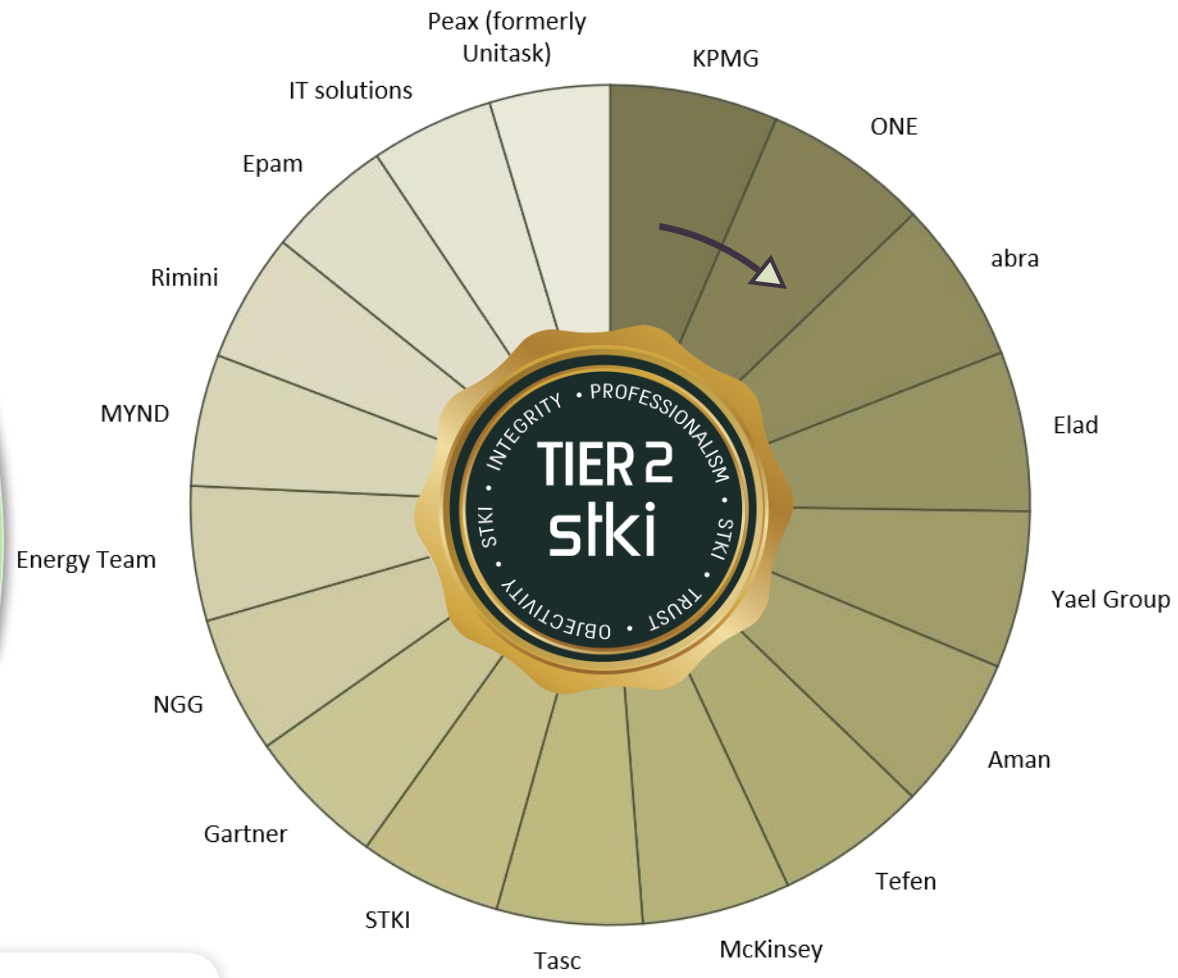


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value added services

IT Strategy Consulting





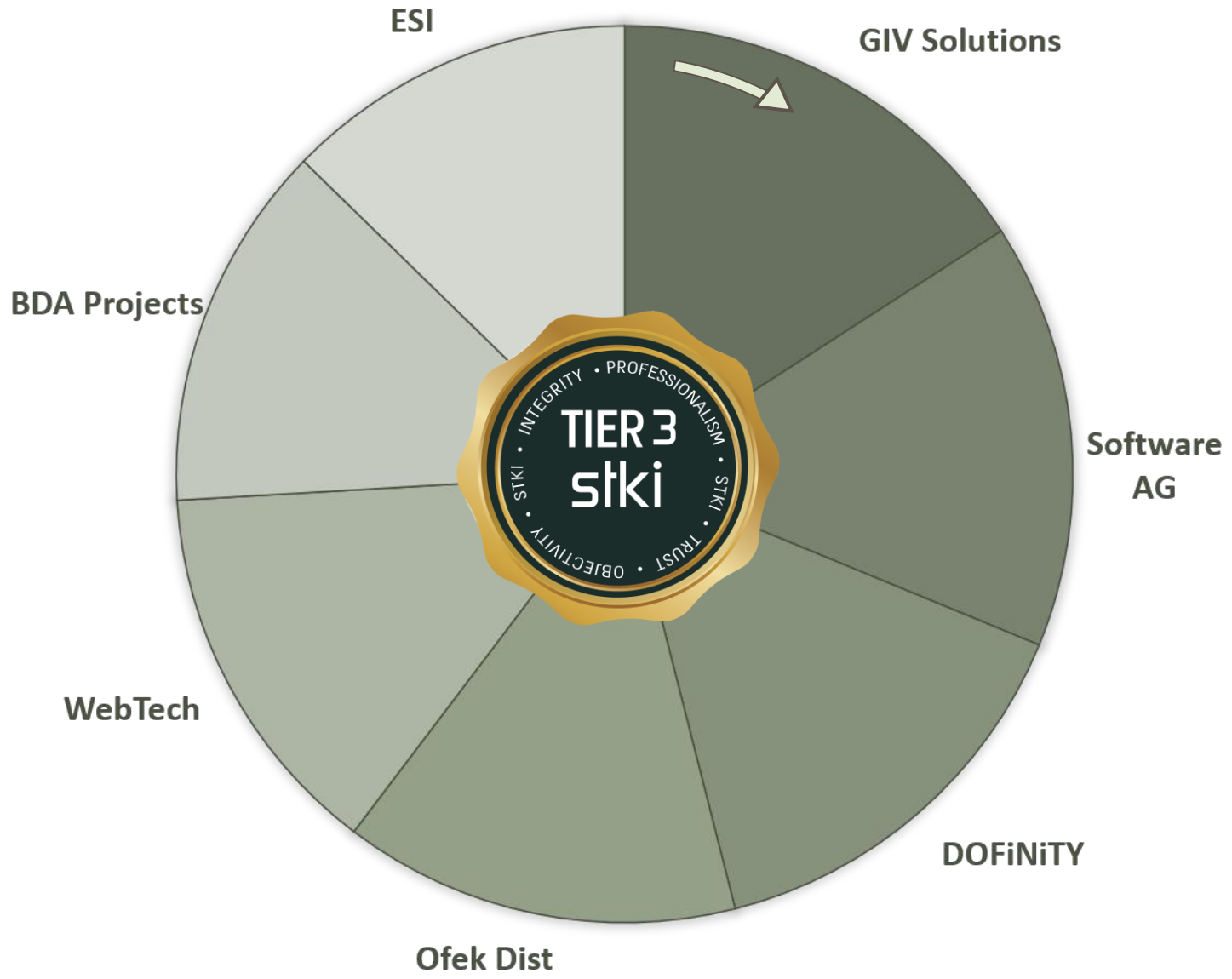
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value added services

IT Strategy Consulting

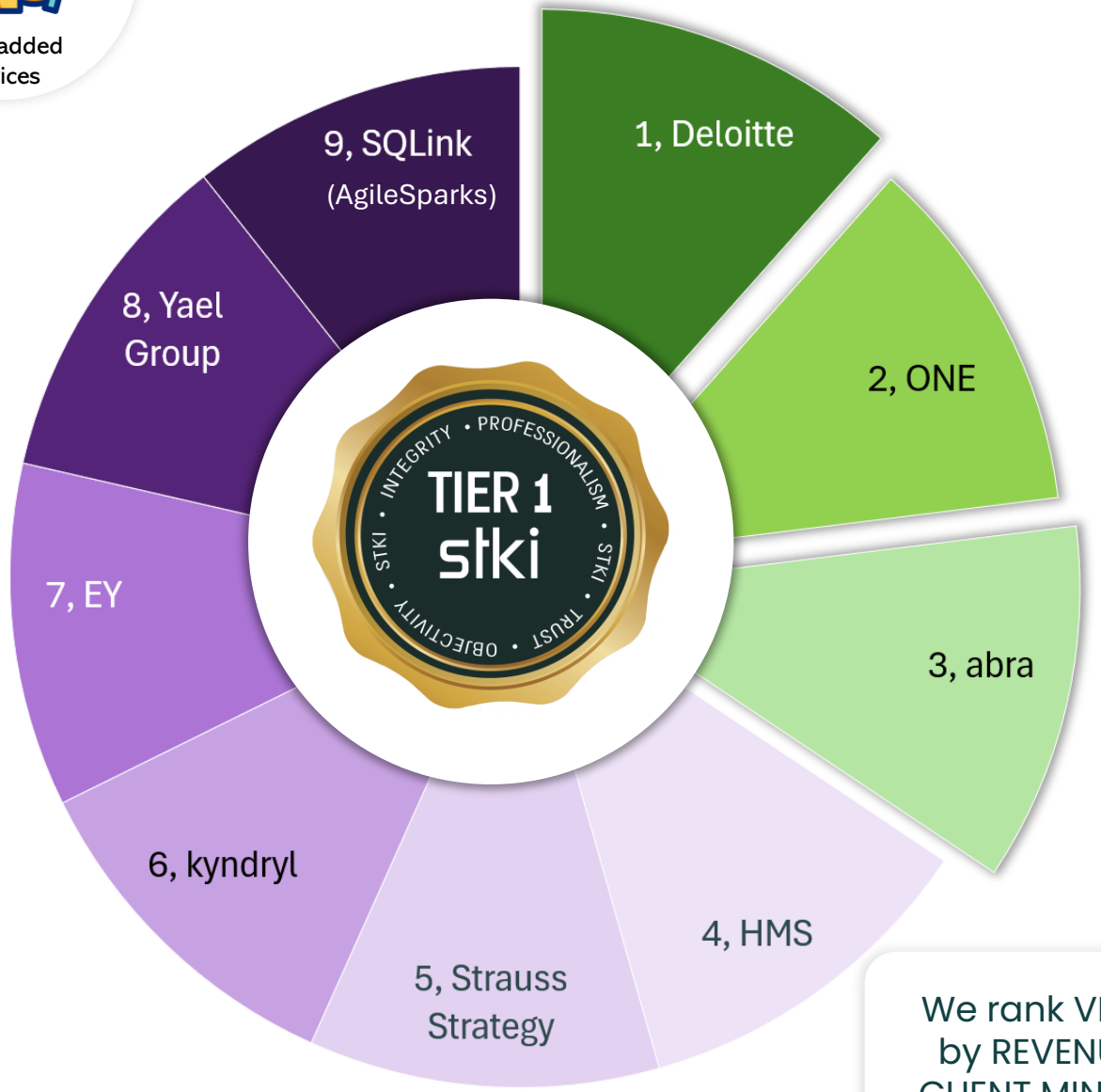
We rank VENDORS by REVENUE and CLIENT MINDSHARE

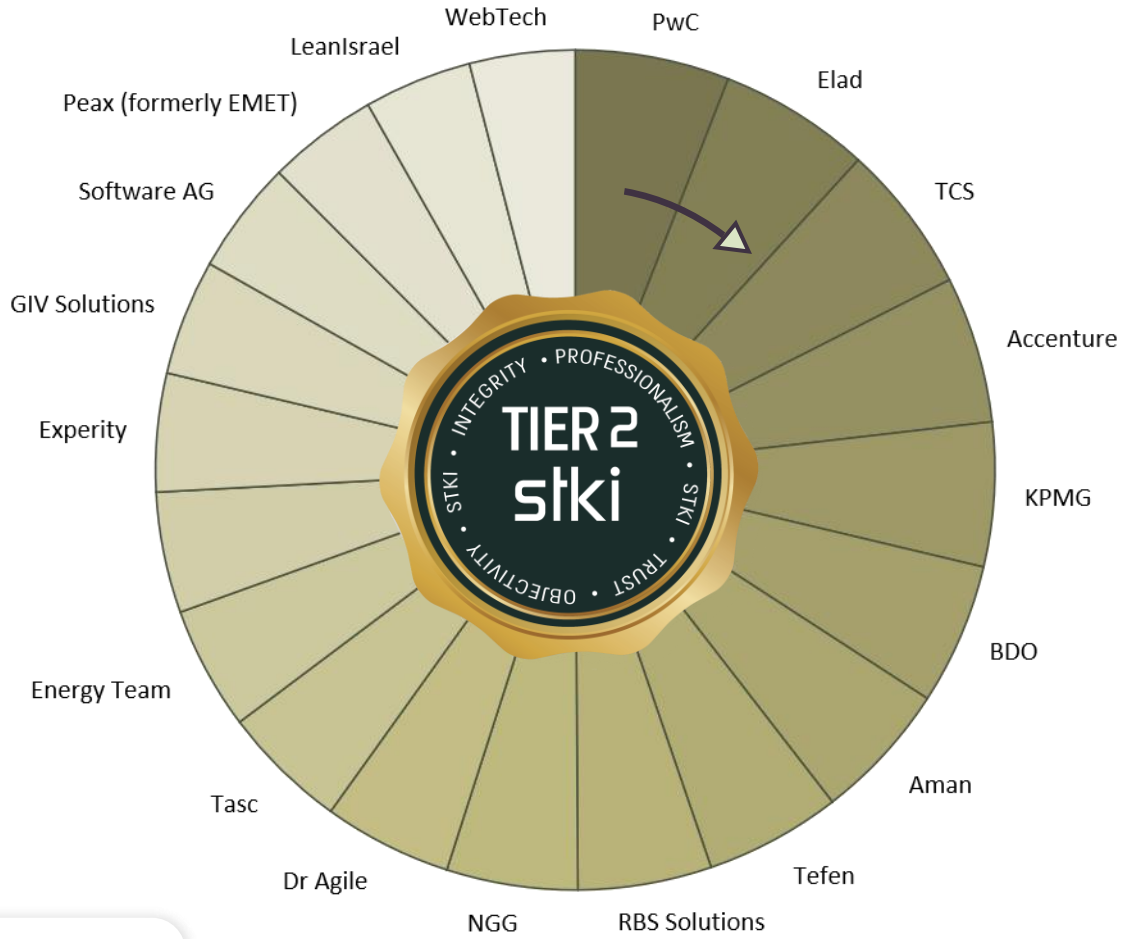


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value added services

Organizational Transformation Consulting





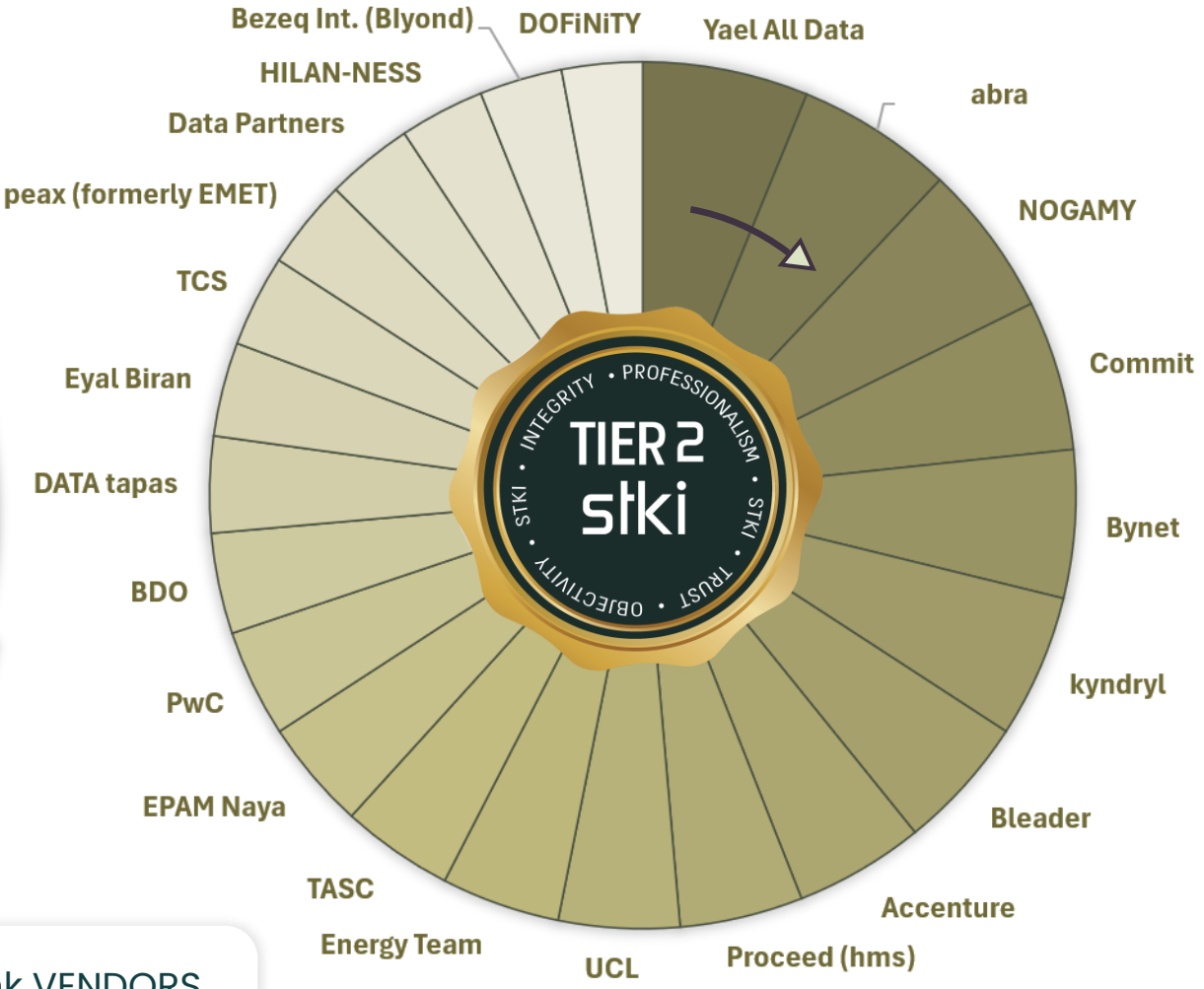
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value added services

Data & AI Strategy Consulting





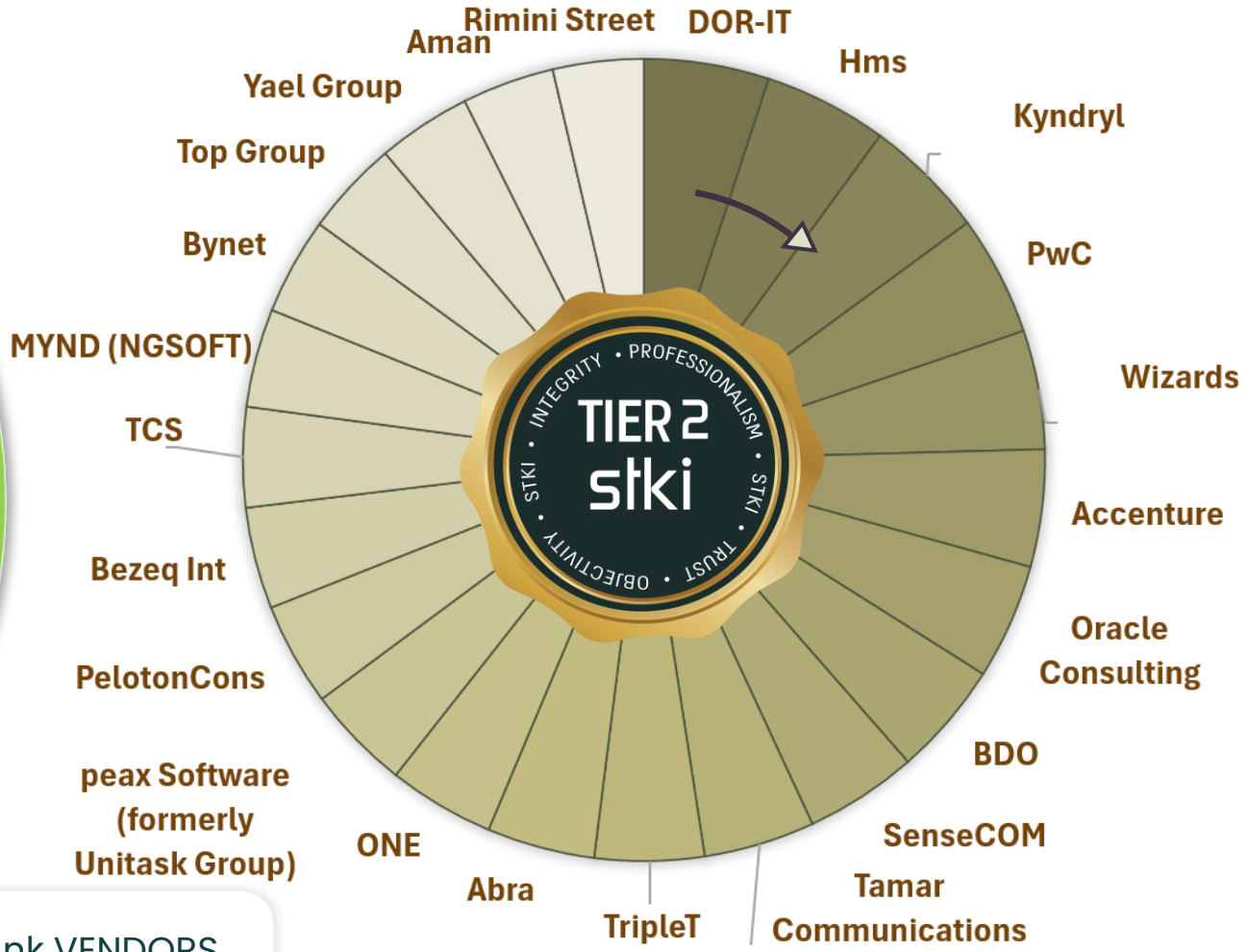
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value added services

IT Infrastructure & Cloud Consulting





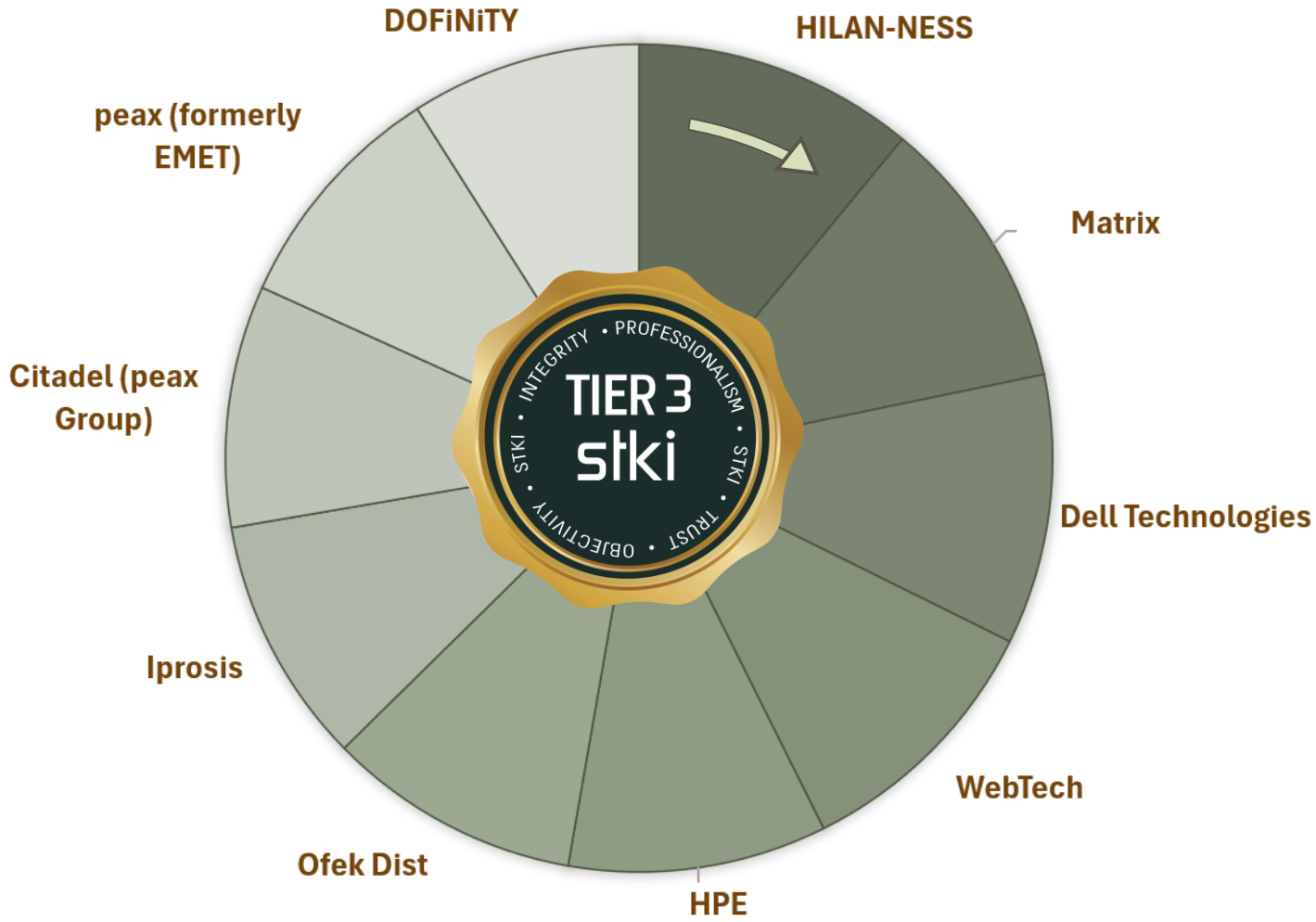
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IT Infrastructure & Cloud Consulting

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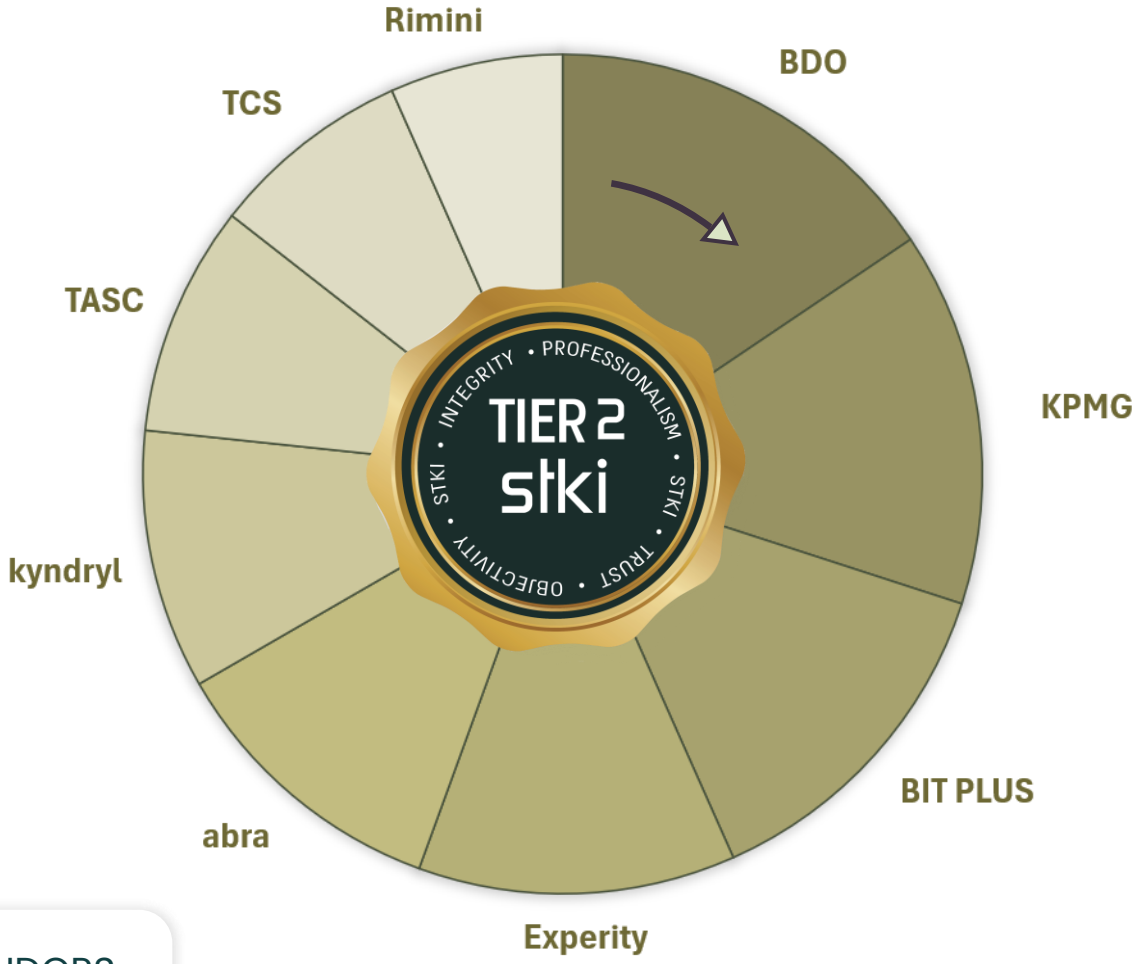


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value added services

Application Projects Consulting





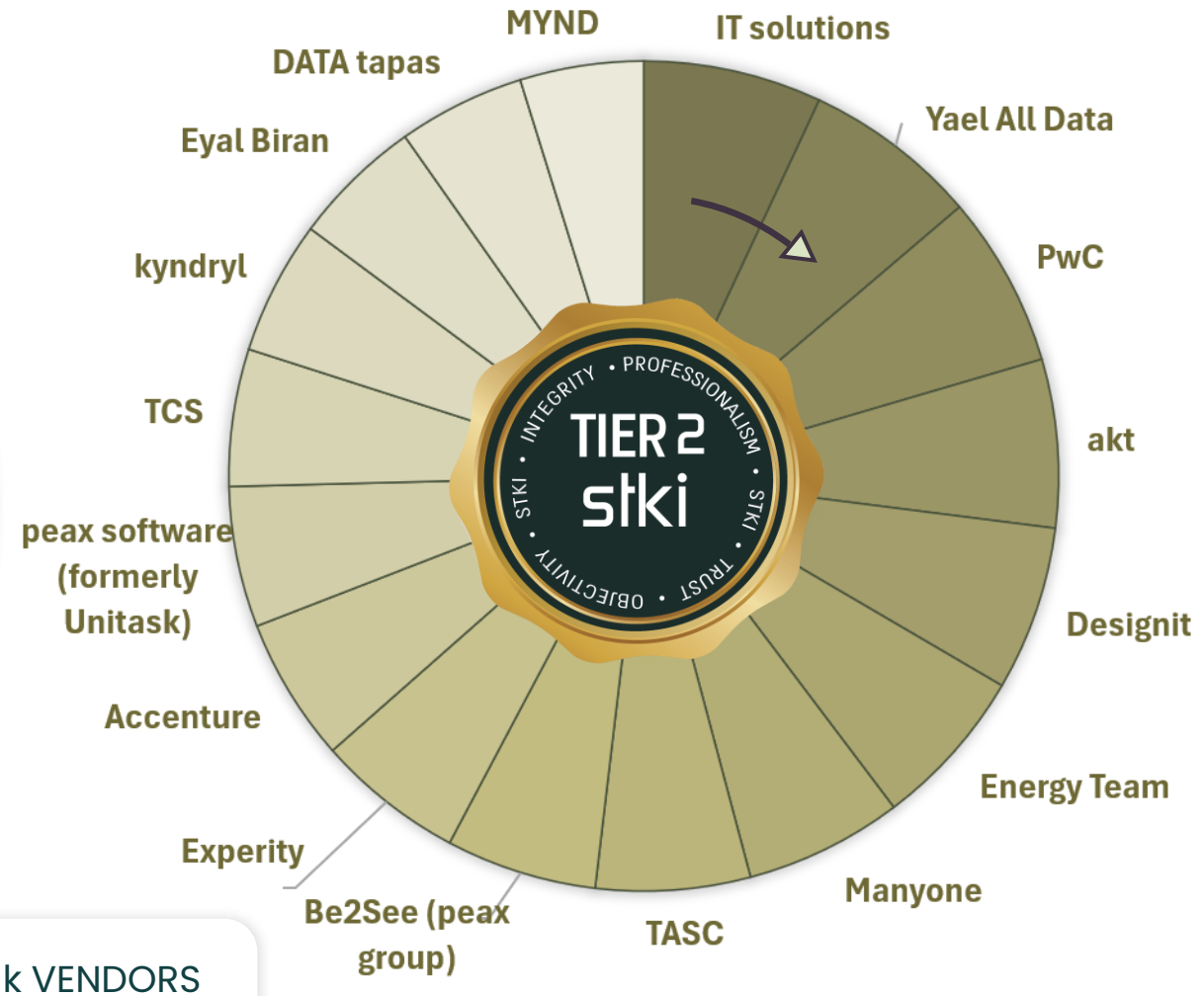
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value added services

Customer Experience & Digital Consulting



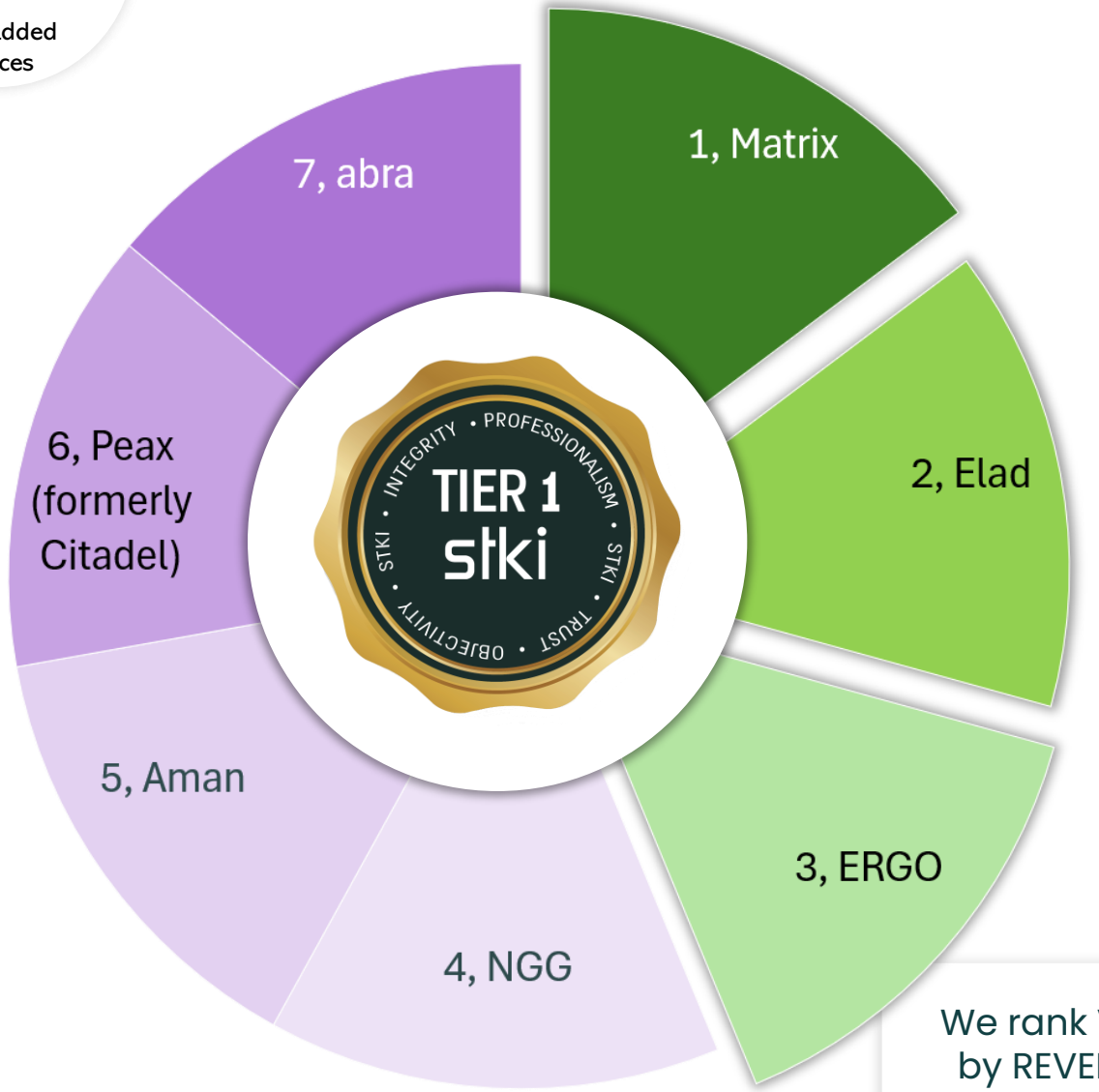


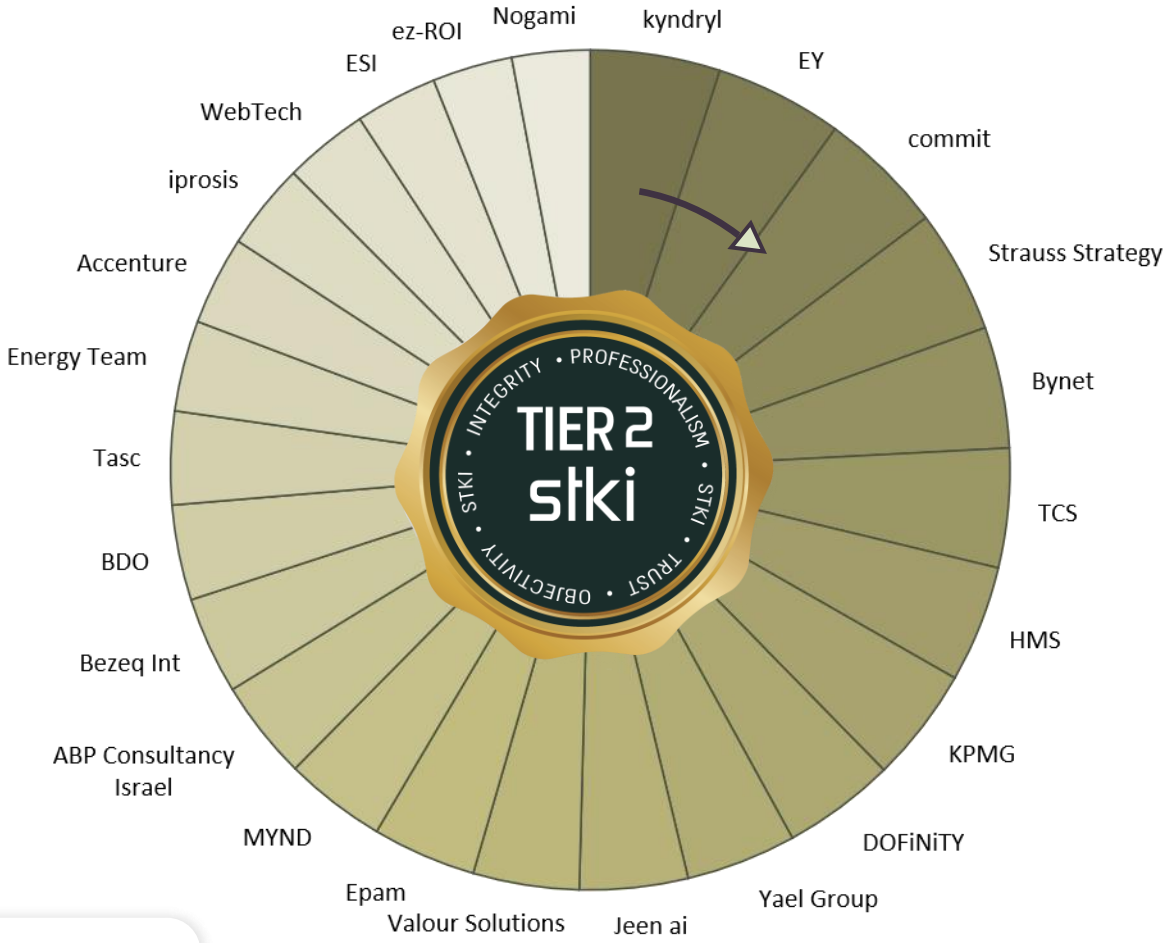
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value added services

Intelligent Automation & Process Optimization





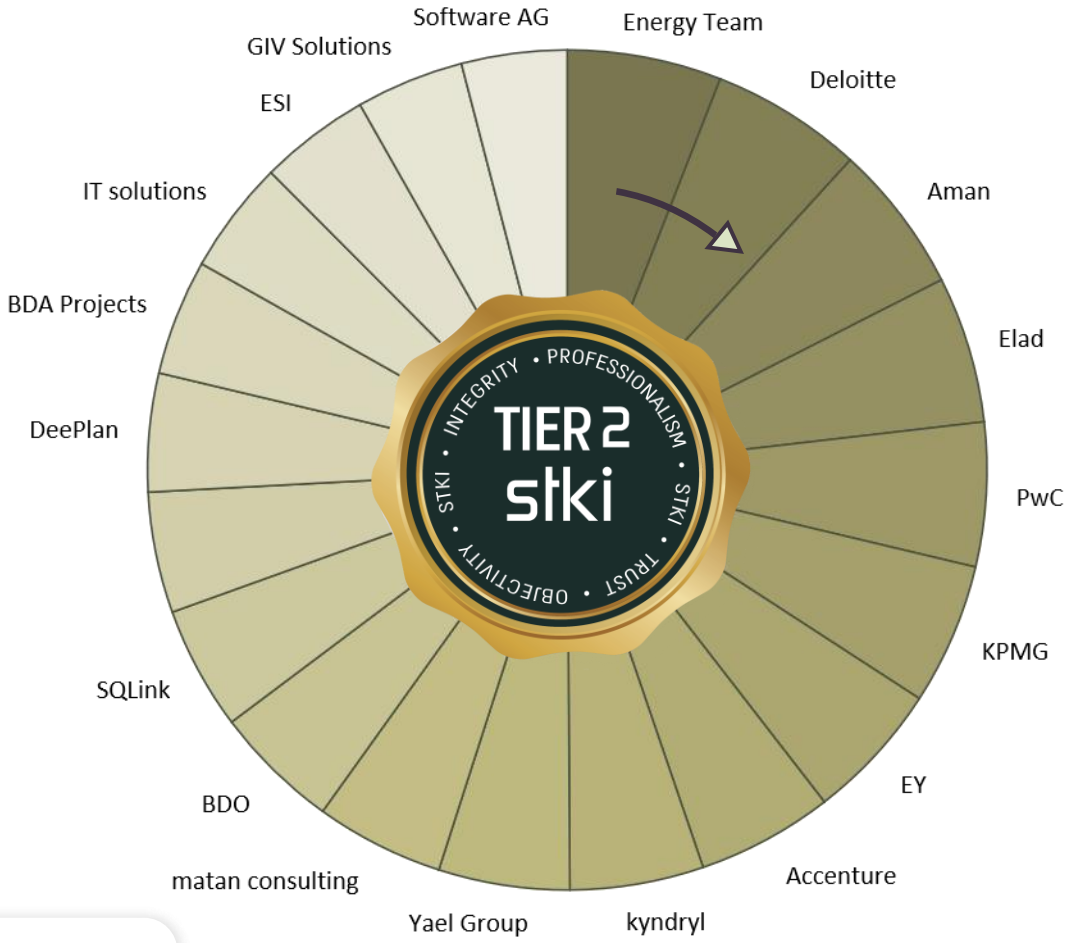
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PMO/ OCIO Consulting





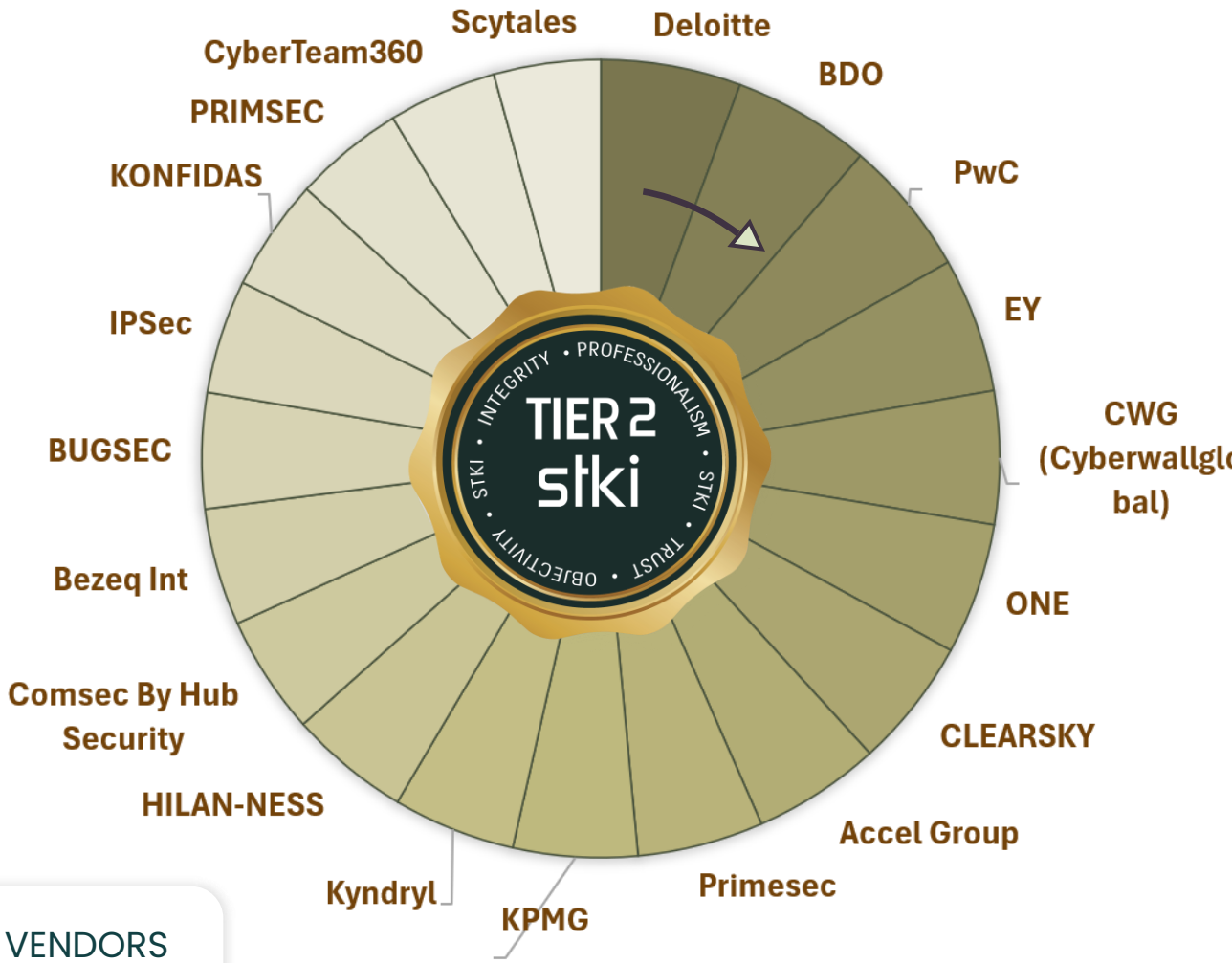
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value added services

Cyber Security Consulting





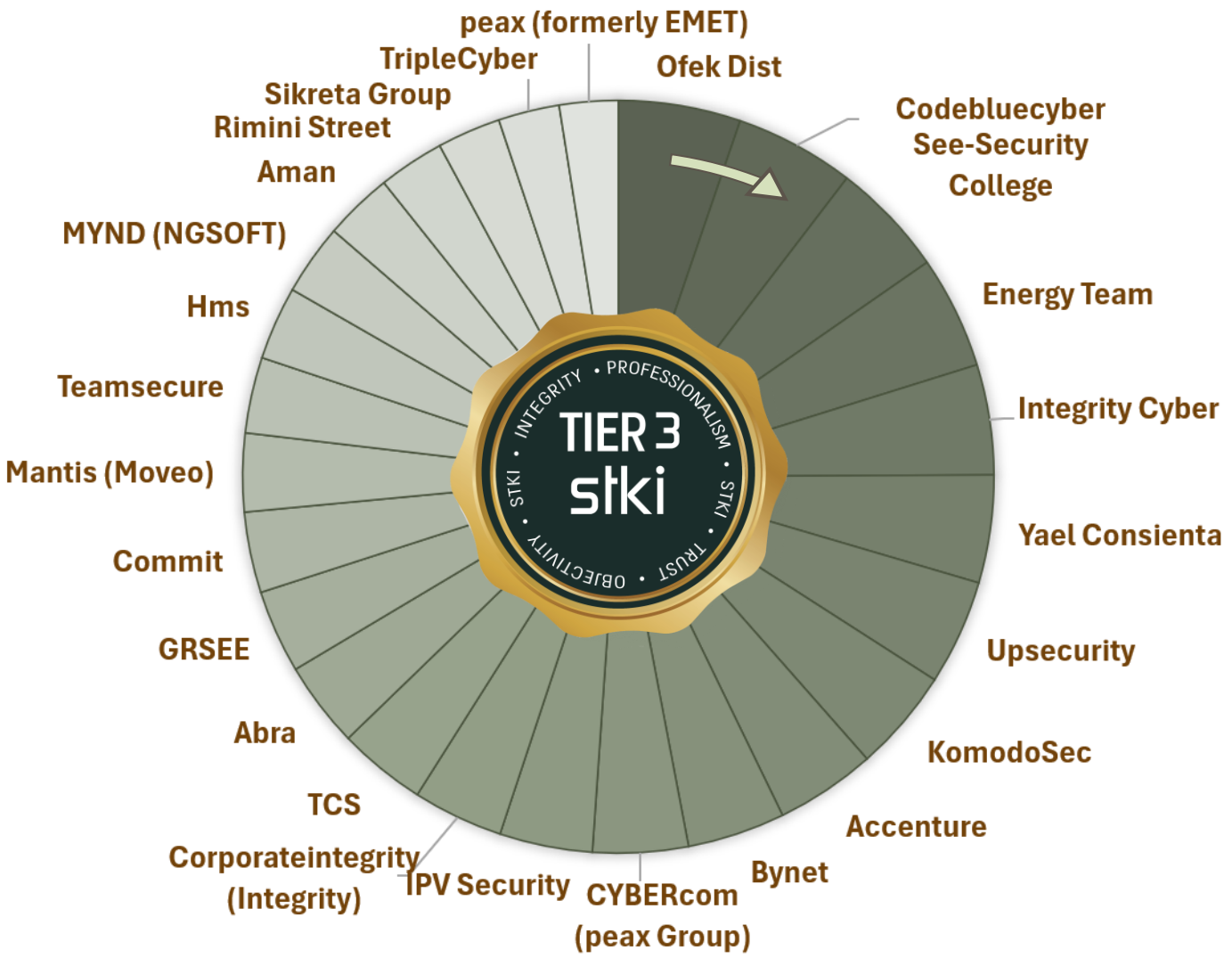
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value added services

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Cyber Security Consulting



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software

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Regulation Policy & Risk Consulting



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value added services

3rd Party Maintenance 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
Hardware Maintenance (3rd party)	70	-3%	68	-4%	65	-5%	62	-5%	59	14%	67	12%	75	20%	90	-18%	74
TOTALS	70	-2.86%	68	-4.41%	65	-4.62%	62	-4.84%	59	13.56%	67	11.94%	75	20.00%	90	-17.78%	74

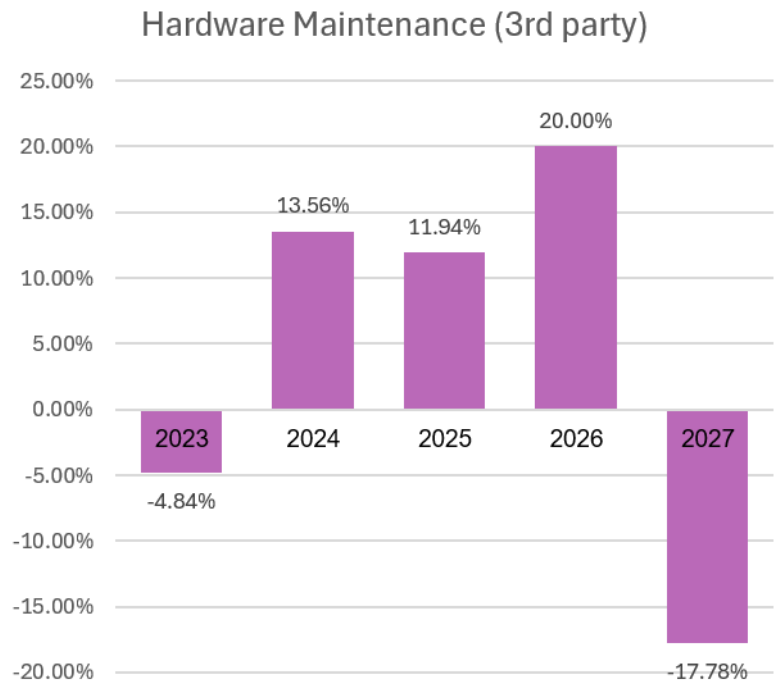
Values in Million USD



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software

3rd Party Maintenance Market 2022-2026

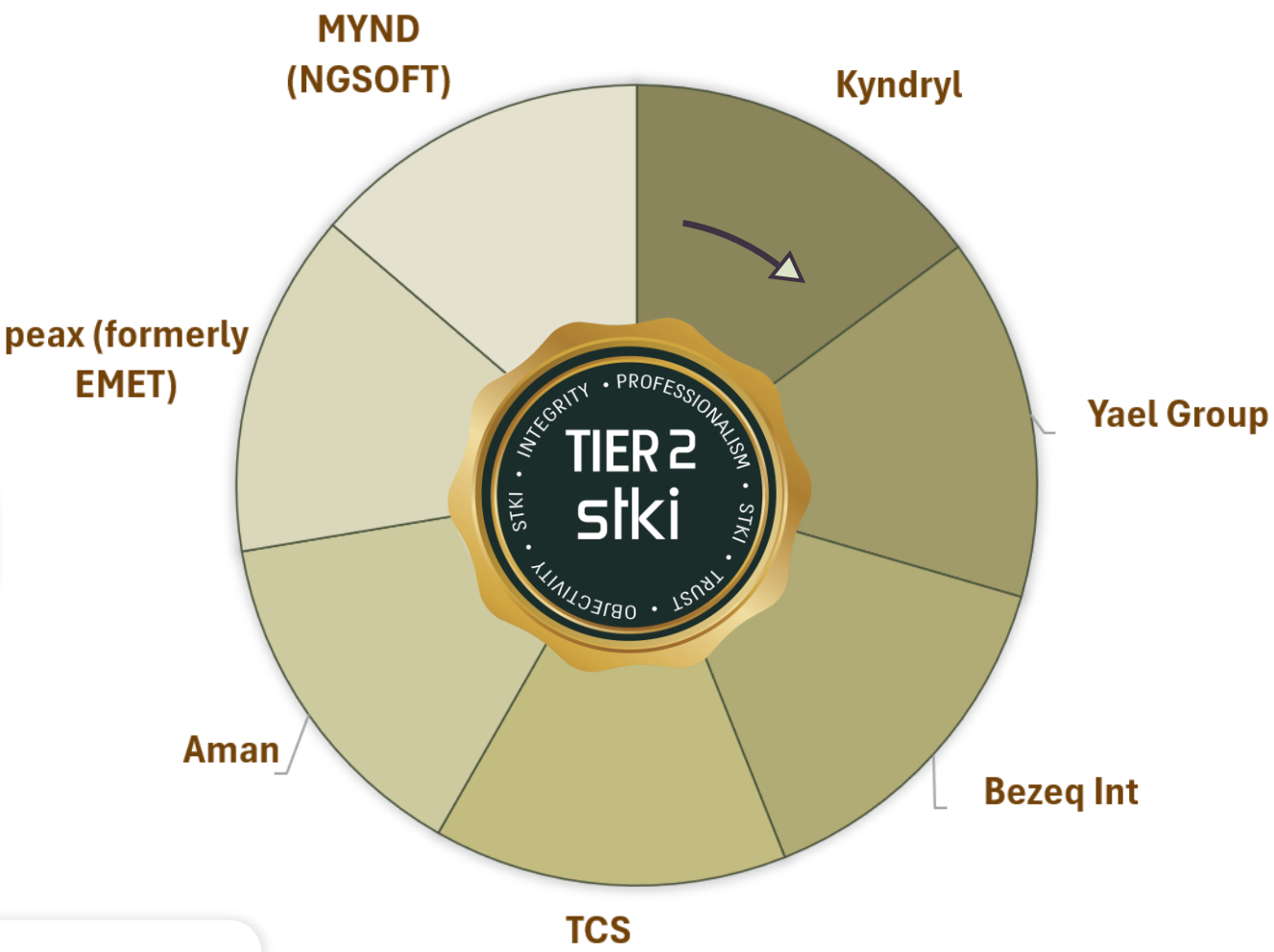


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value added services

Hardware Products Maintenance (3rd party)





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value added services

Infrastructure Projects (On Premise) 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
Consolidation/ Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects	195	5%	204	12%	228	-1%	225	-1%	222	4%	230	-2%	226	-7%	210	11%	234
Software Integration (Middleware, SOA, APIMNG)	60	25%	75	7%	80	-9%	73	-7%	68	-4%	65	5%	68	3%	70	3%	72
Cyber Security Product Implementations	224	3%	230	3%	238	5%	250	8%	270	4%	280	3%	288	2%	295	3%	305
Unified Communication Projects (IM, Video, Voice)	22	36%	30	13%	34	-12%	30	-7%	28	-4%	27	30%	35	20%	42	19%	50
TOTALS	501	7.58%	539	7.61%	580	-0.34%	578	1.73%	588	2.38%	602	2.49%	617	0.00%	617	7.13%	661

Values in Million USD

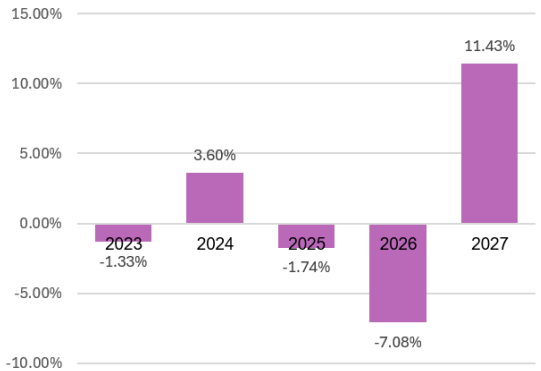


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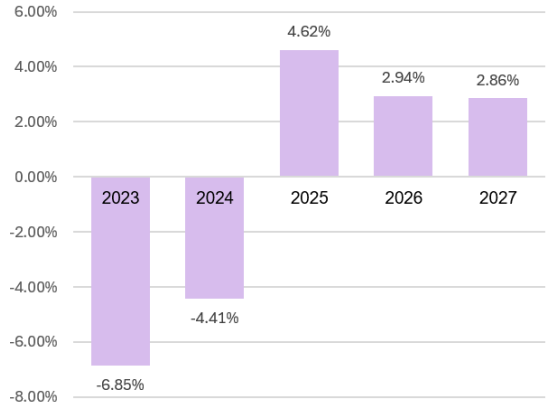
value added services

Infrastructure Projects (On Premise) Market 2022-2026

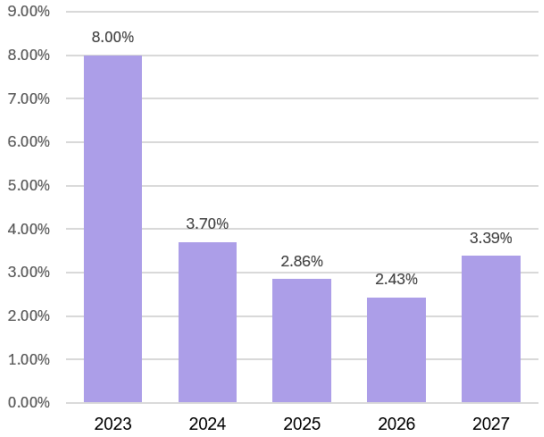
Consolidation/ Virtualization/ Containers /Monitoring/ Storage/ Hardware/ Networking Projects



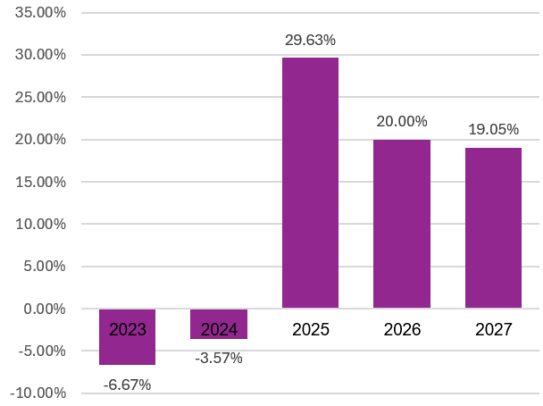
Software Integration (Middleware, SOA, APIMNG)



Cyber Security Product Implementations



Unified Communication Projects (IM, Video, Voice)

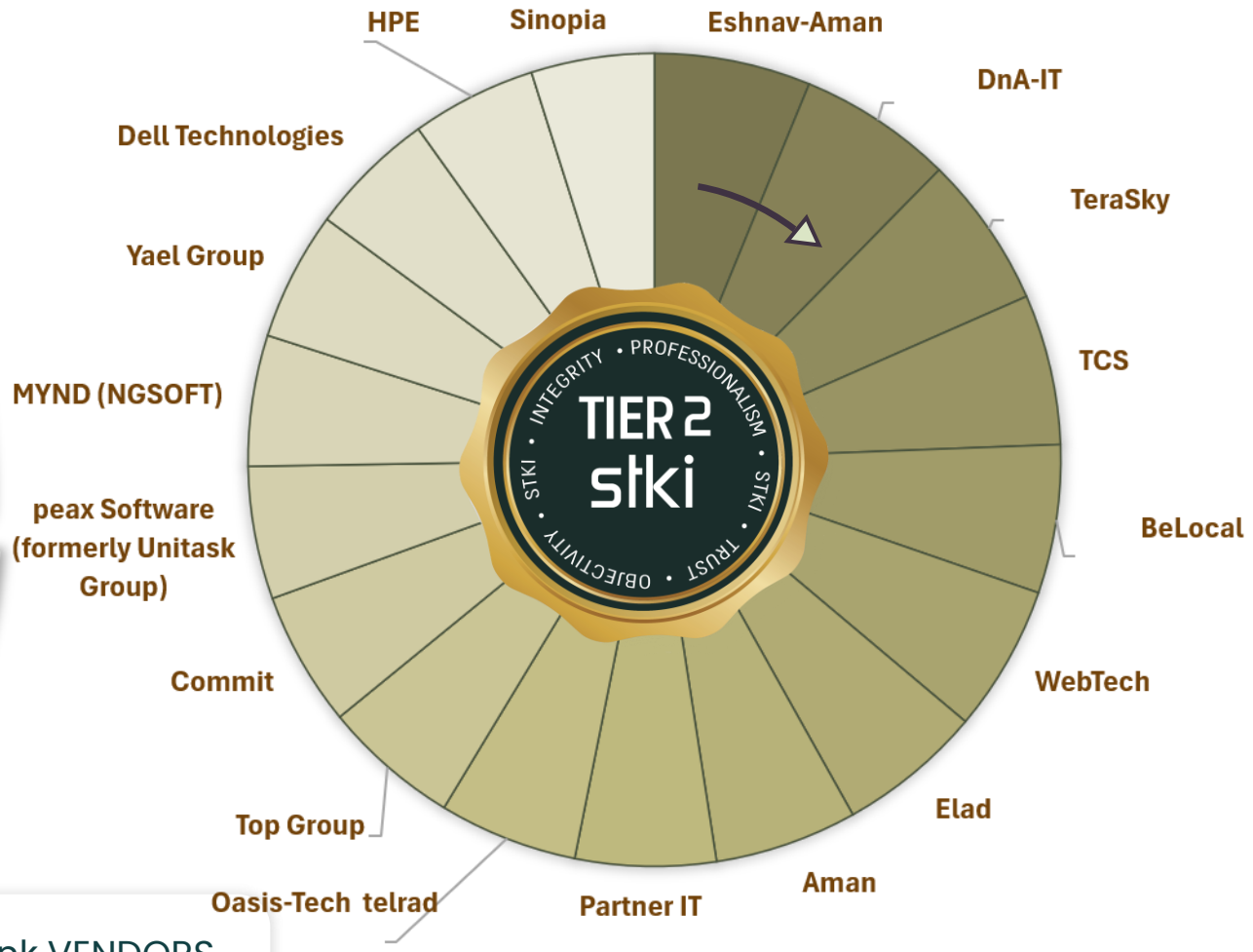


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value added services

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





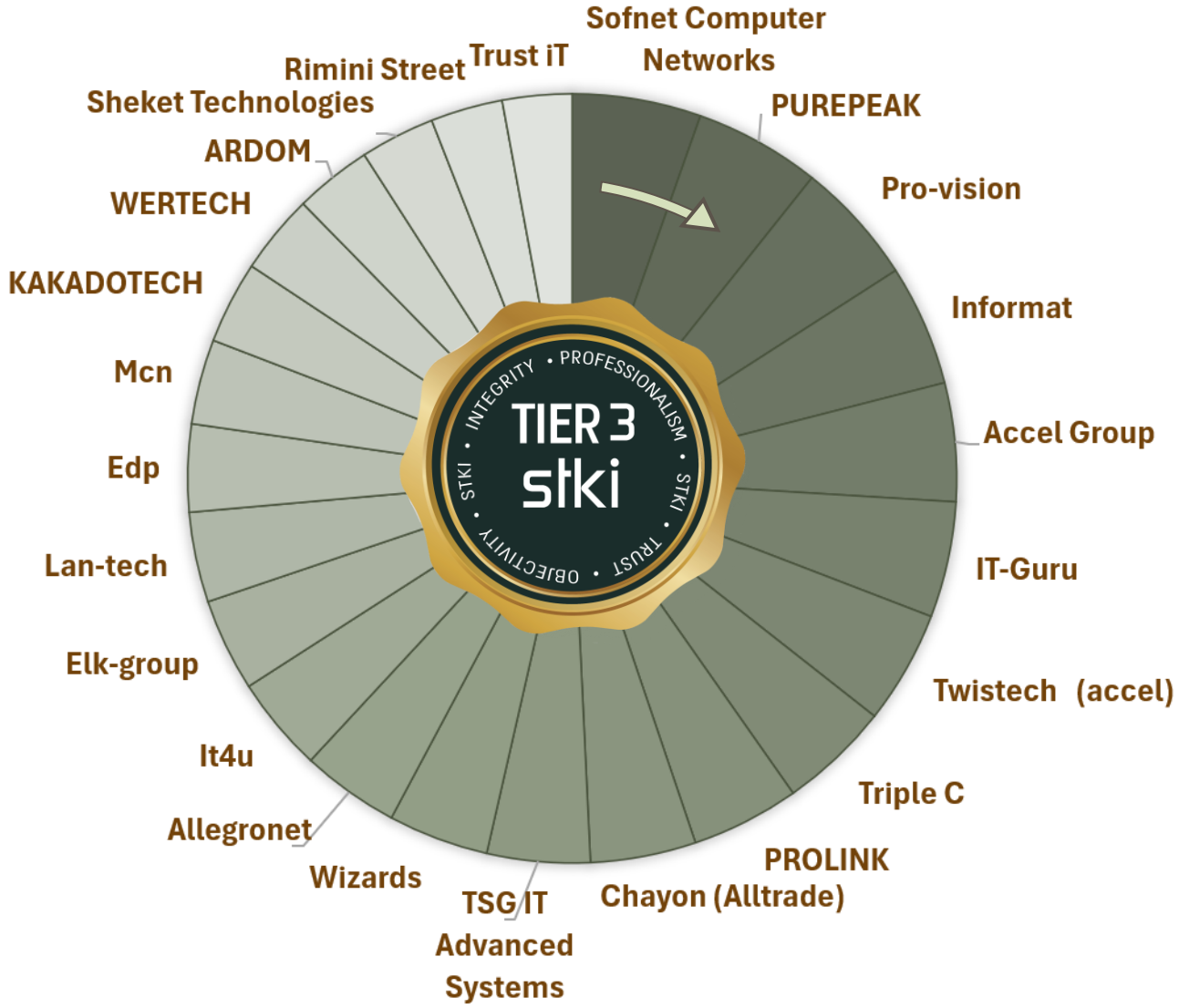
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value added services

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

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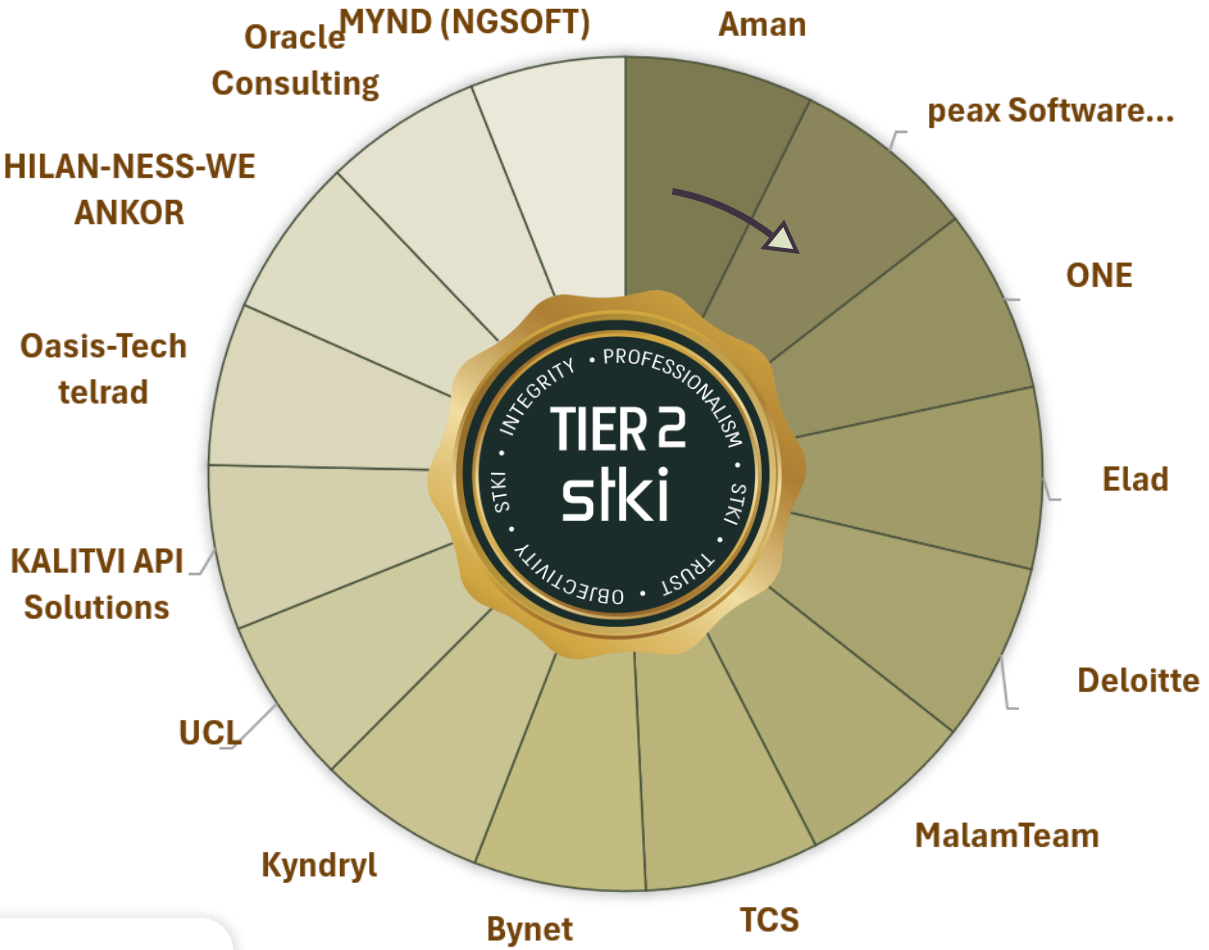


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Software Integration of Middleware, SOA & BPM (On Premise)





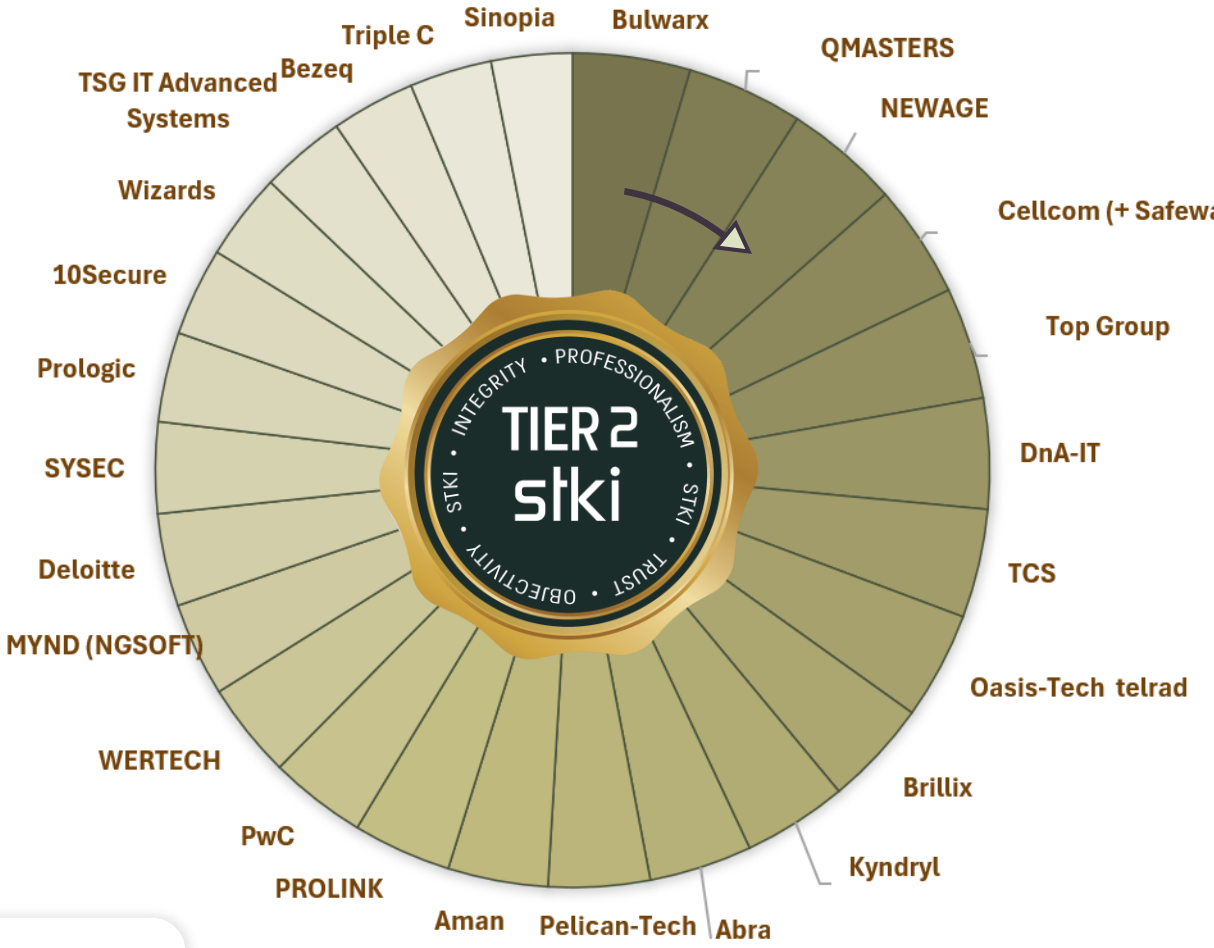
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value added services

Cyber Security Product Implementations (On Premise)





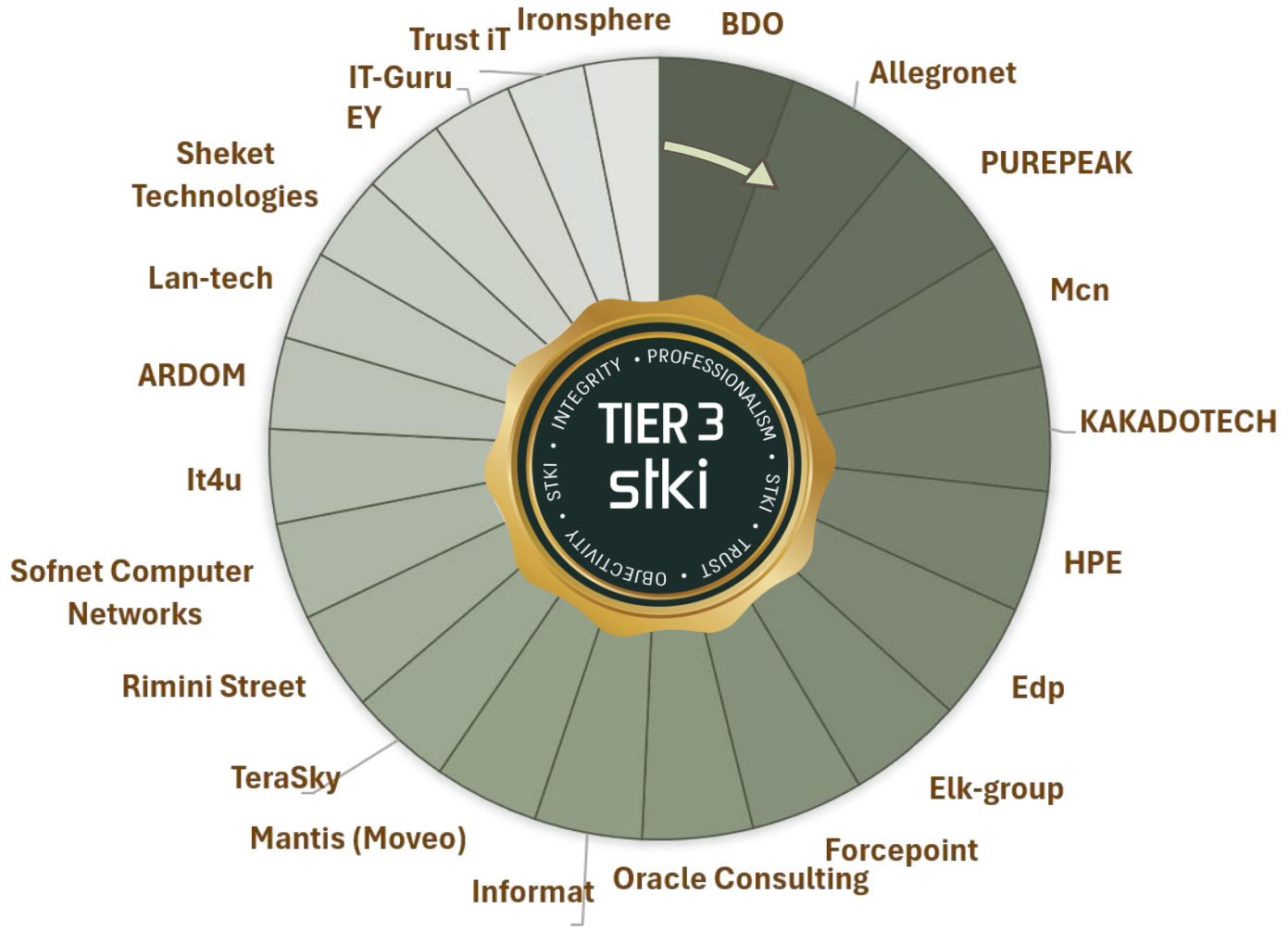
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Cyber Security Product Implementations (On Premise)

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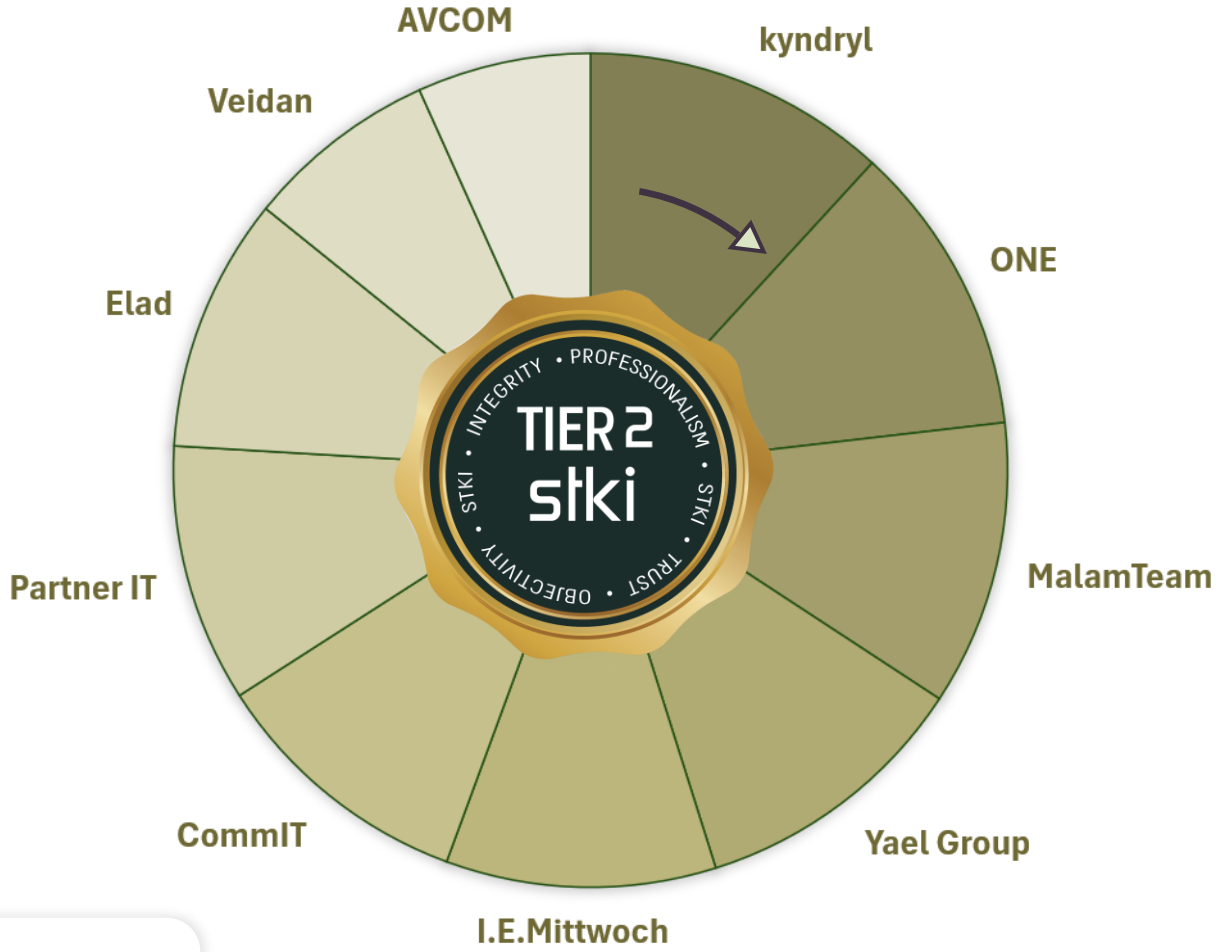


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Unified Communication Projects (IM, Video, Voice) (On Premise)





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Cloud Projects (public cloud only) Market 2020-2028

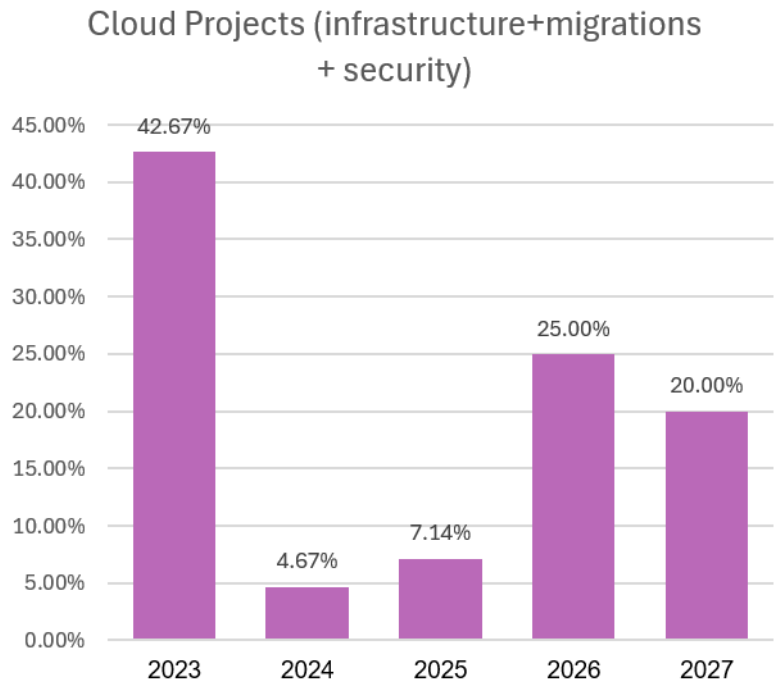
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
Cloud Projects (infrastructure+migrations + security)		#DIV/0!	32	84%	59	27%	75	43%	107	5%	112	7%	120	25%	150	20%	180
TOTALS	0	#DIV/0!	32	84.38%	59	27.12%	75	42.67%	107	4.67%	112	7.14%	120	25.00%	150	20.00%	180

Values in Million USD

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value added services

Cloud Projects (public cloud only) Market 2022-2026

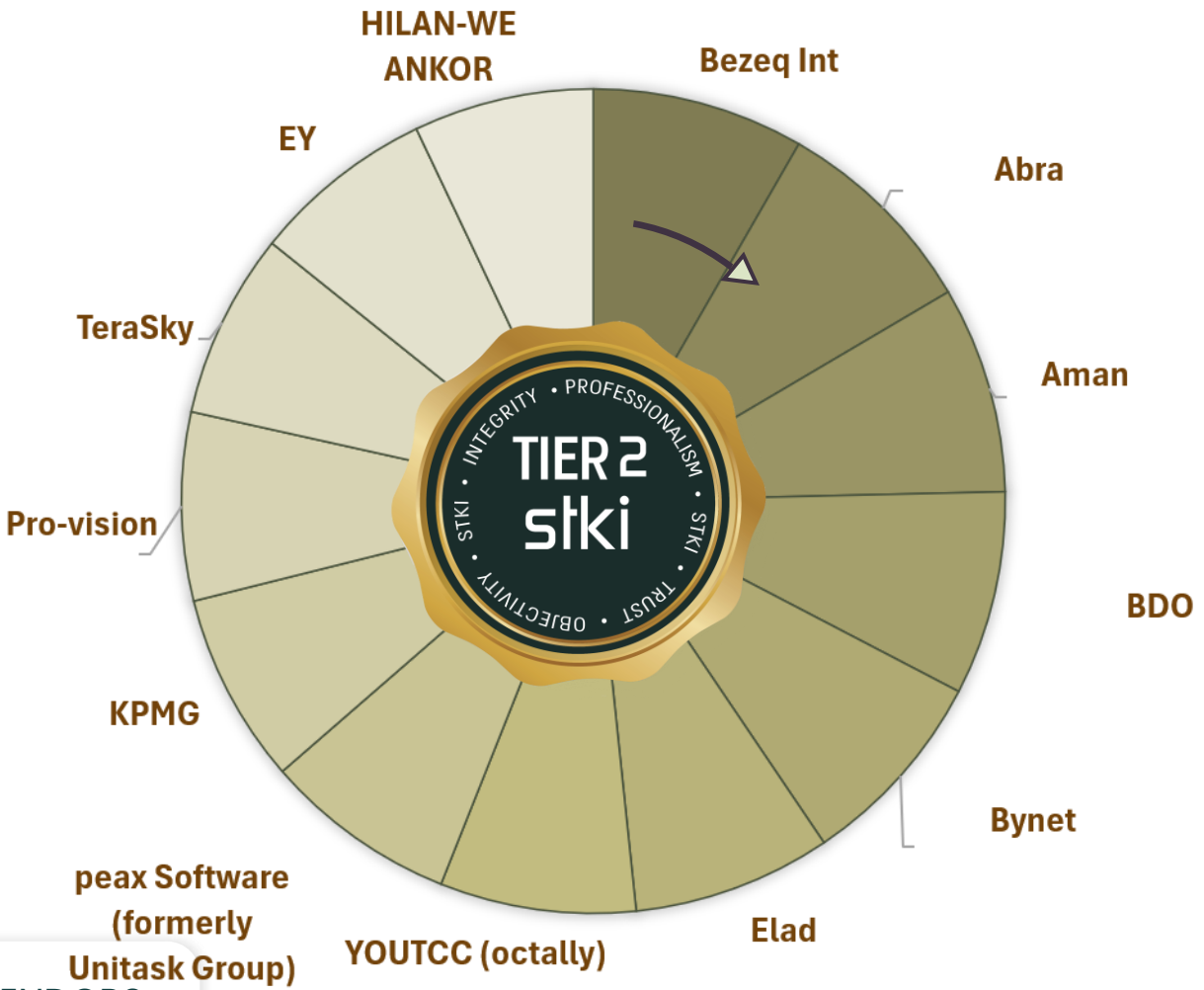


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Cloud Projects (public cloud only)





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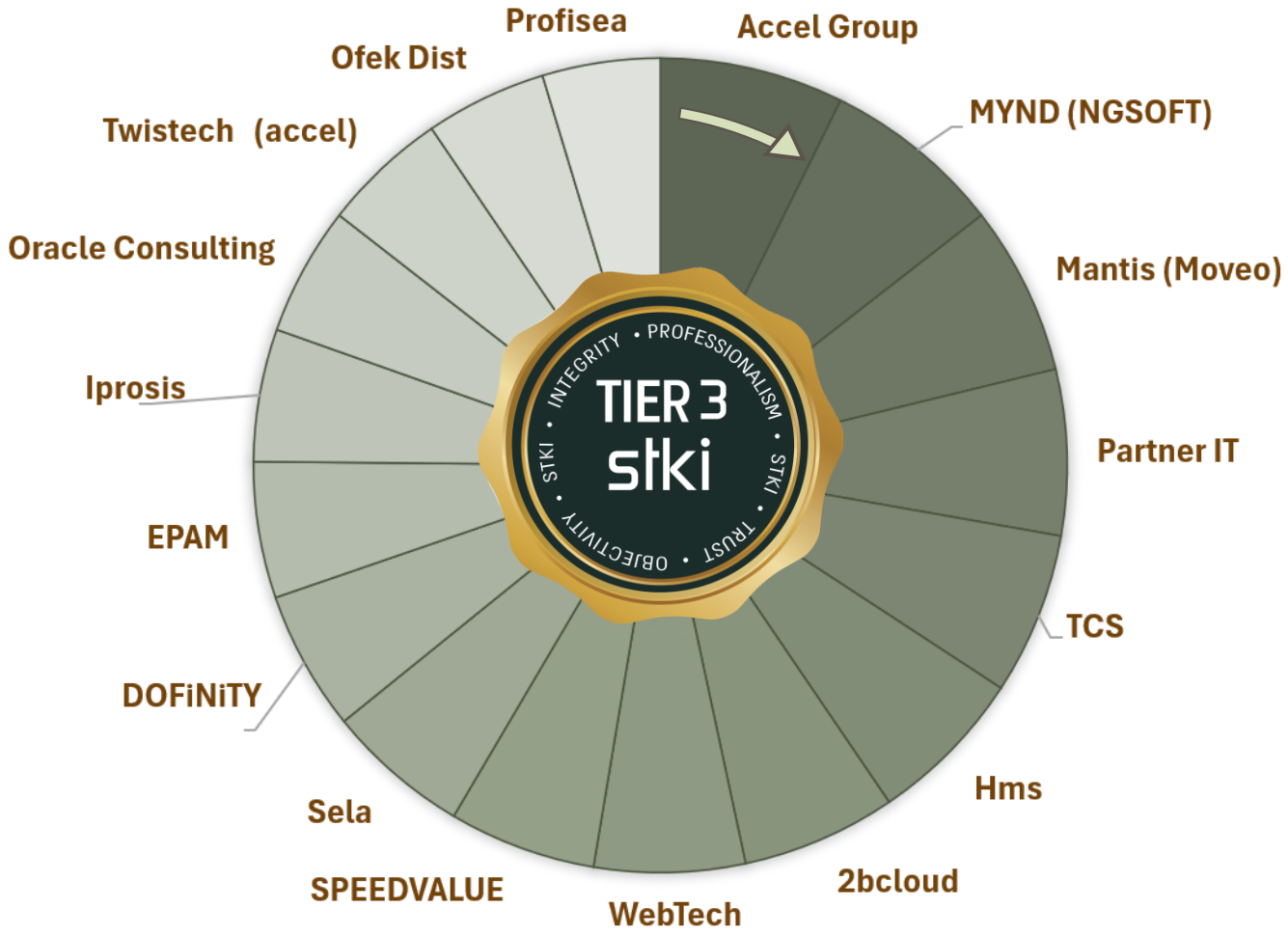
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Cloud Projects (public cloud only)

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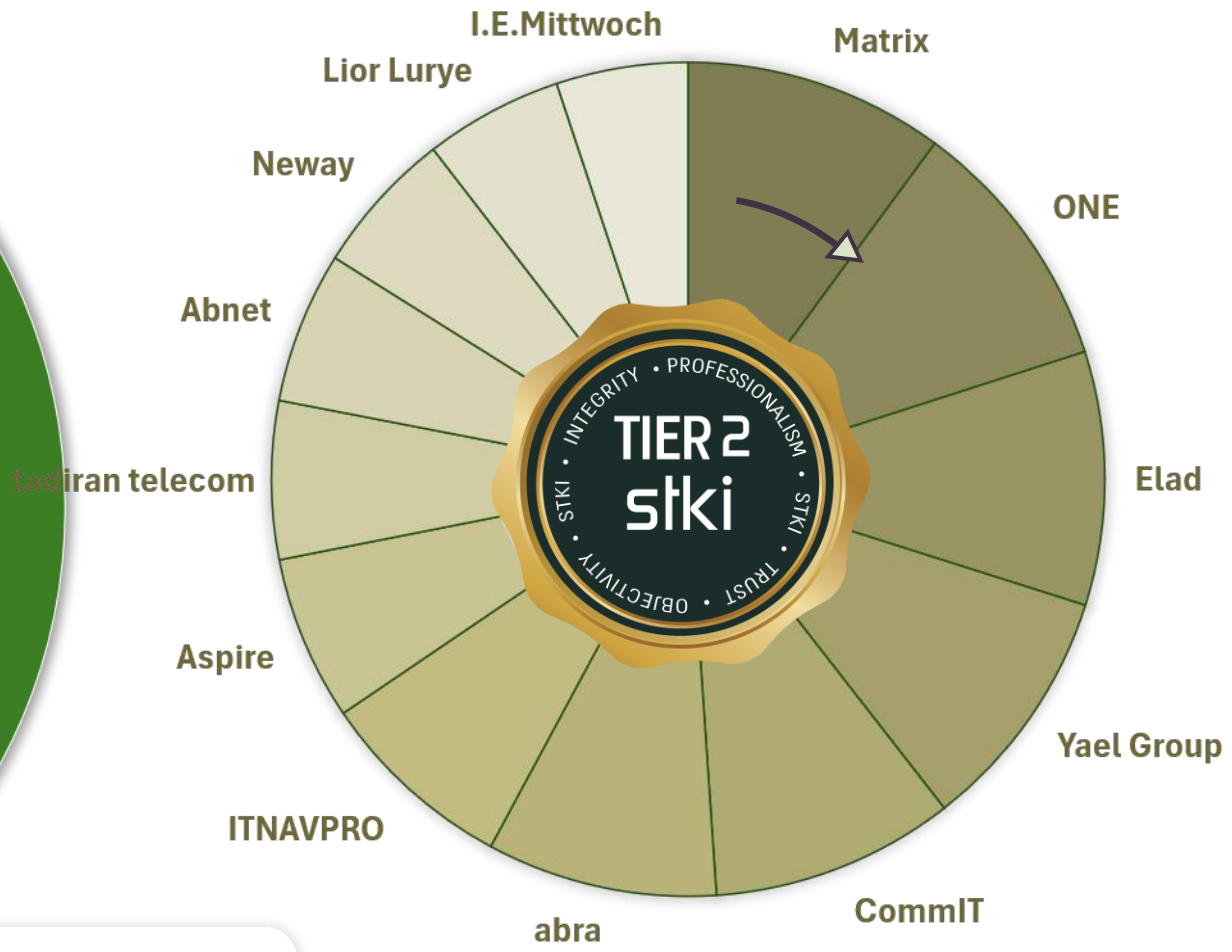


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Unified Communication Projects (IM, Video, Voice) (Cloud)





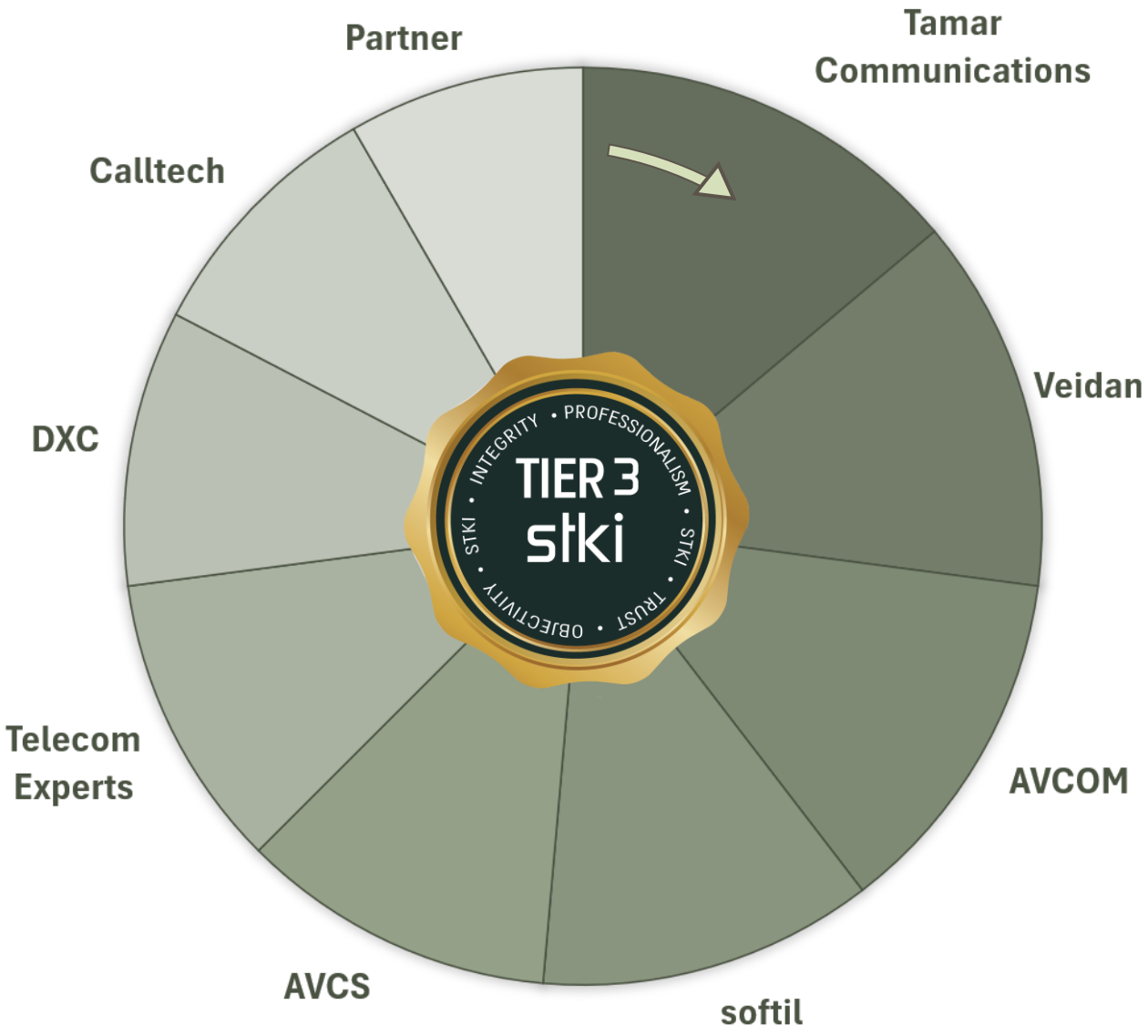
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Unified Communication Projects (IM, Video, Voice) (Cloud)

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value added services

Implementation of Project Management & Development tools Market 2020-2028

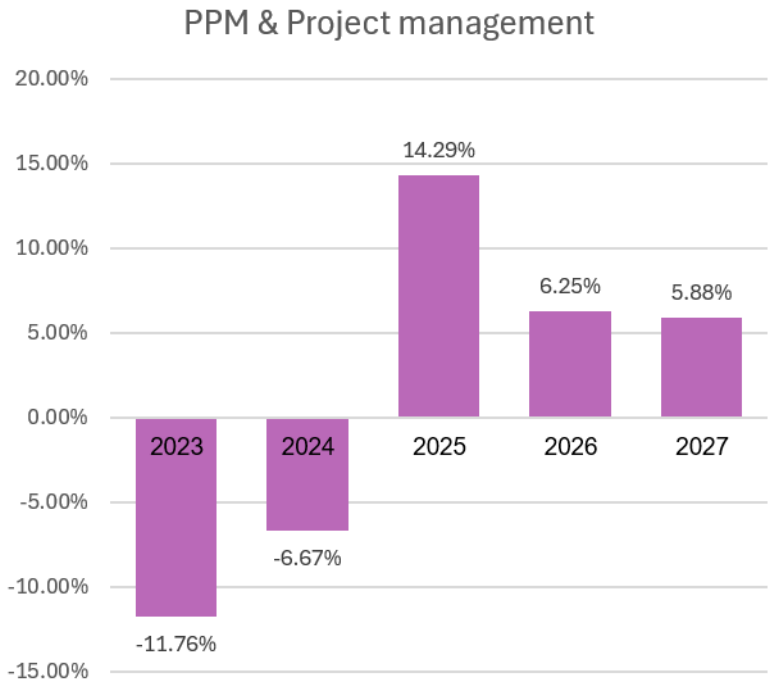
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
PPM & Project management	34	-12%	30	7%	32	6%	34	-12%	30	-7%	28	14%	32	6%	34	6%	36
ALM & Development & Testing tools implementation	45	-4%	43	-12%	38	5%	40	-3%	39	-10%	35	9%	38	8%	41	10%	45
TOTALS	79	-7.59%	73	-4.11%	70	5.71%	74	-6.76%	69	-8.70%	63	11.11%	70	7.14%	75	8.00%	81

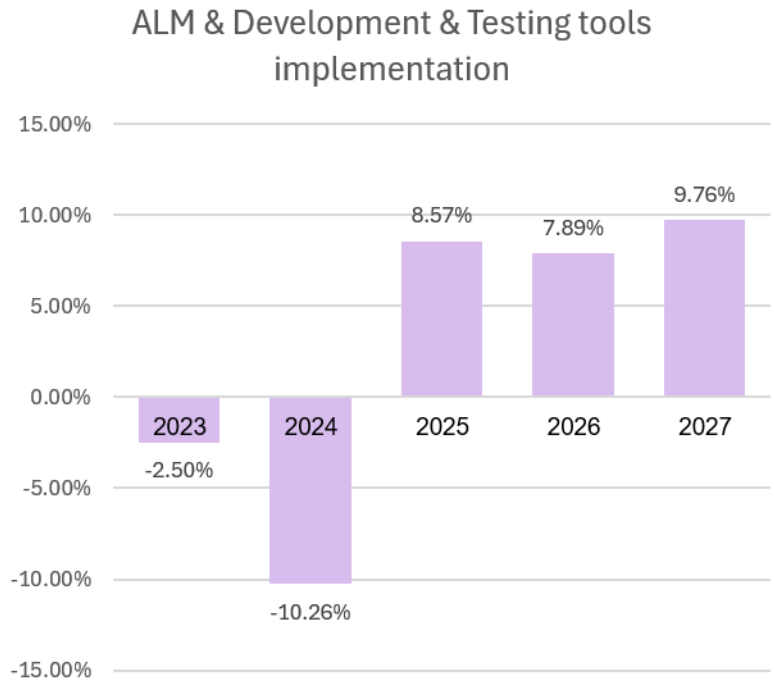
Values in Million USD

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Implementation of Project Management & Development tools Market 2022-2026



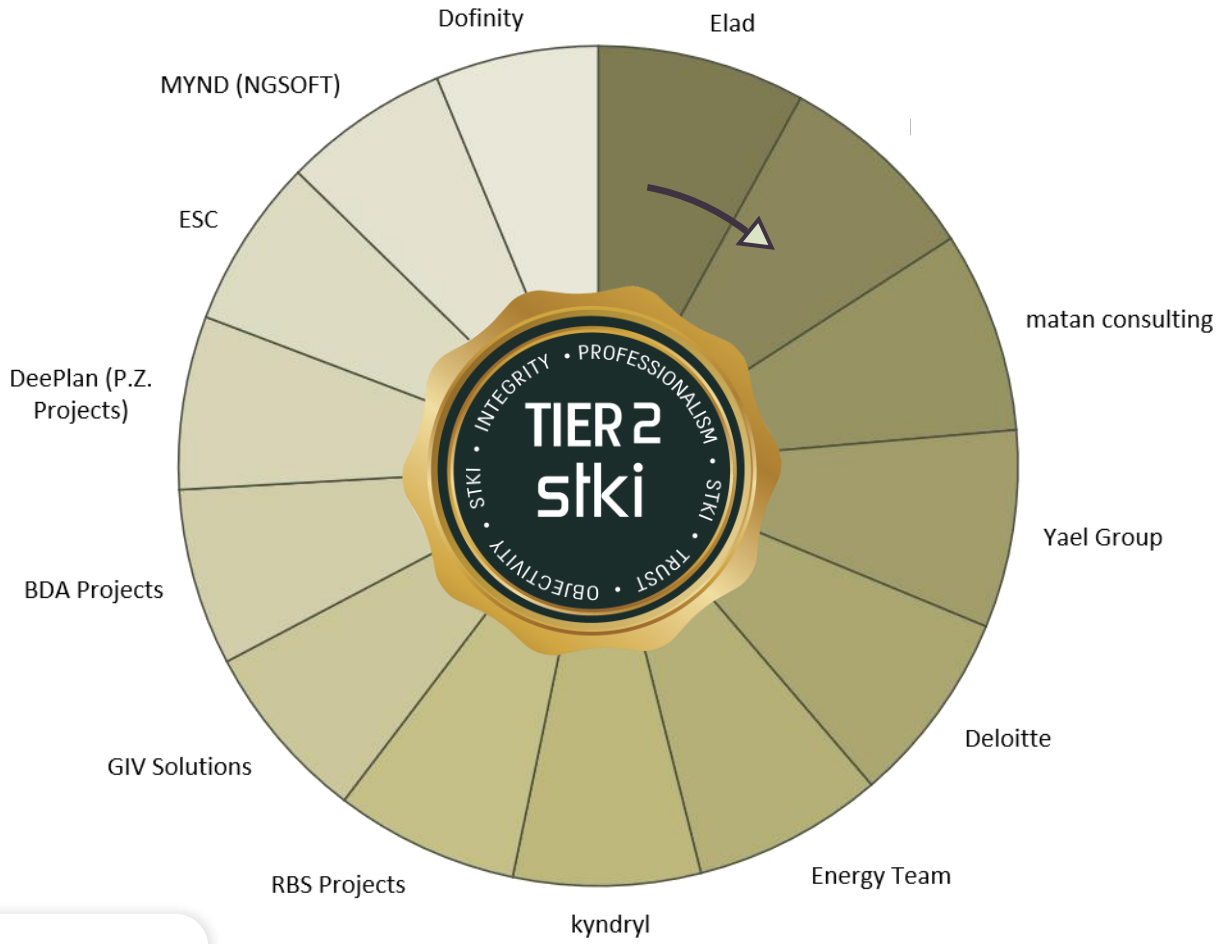


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PPM & Project Management Implementation





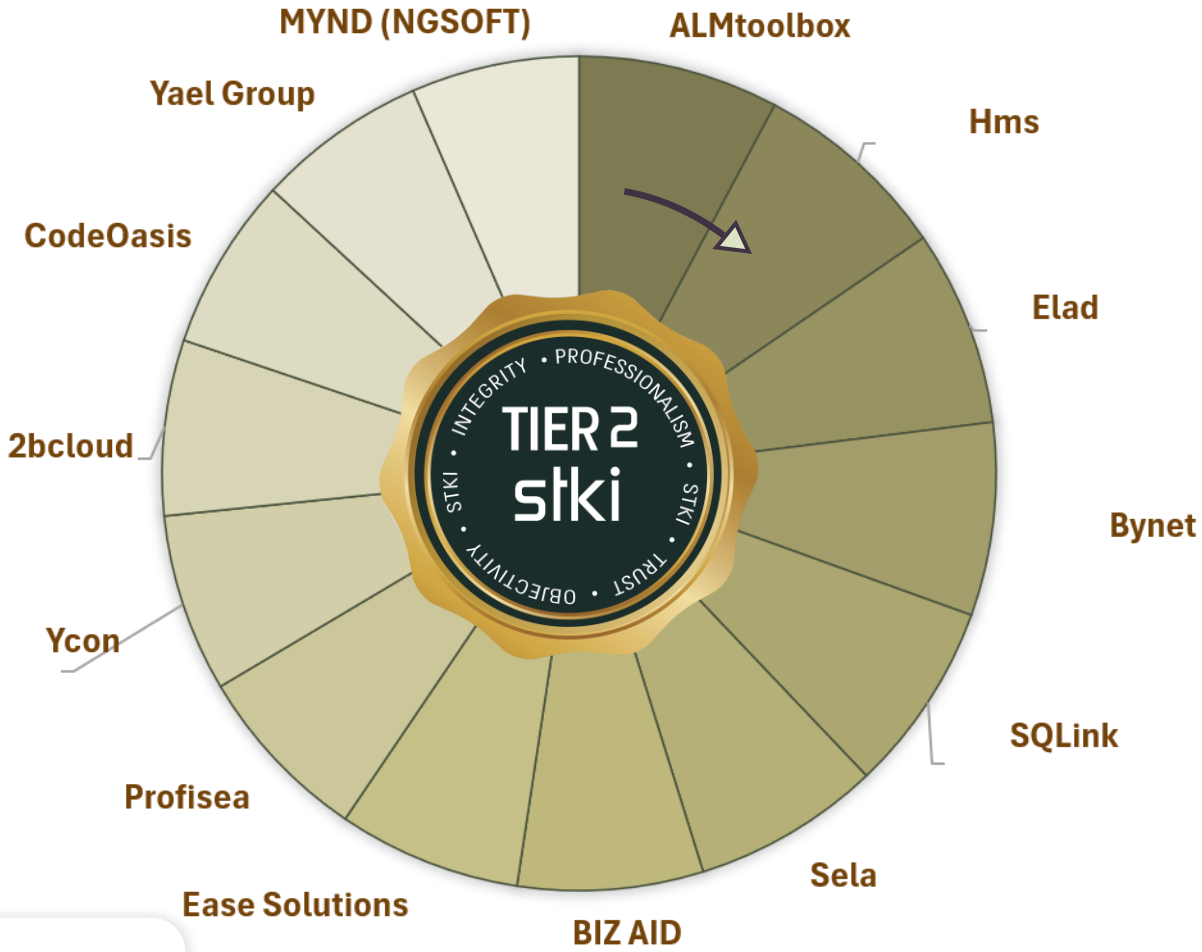
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ALM , Development & Testing tools implementation





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Enterprise Software Implementations Market 2020-2028

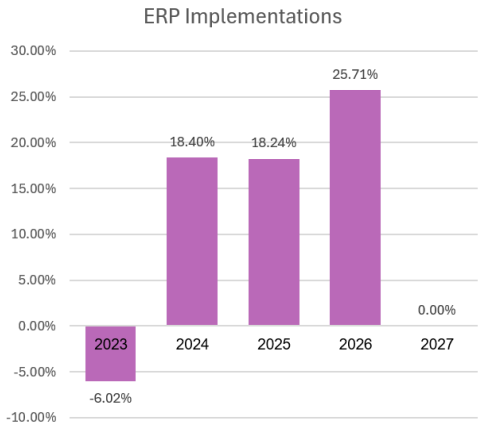
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
ERP Implementations	165	4%	172	2%	176	-24%	133	-6%	125	18%	148	18%	175	26%	220	0%	220
HR & Talent Mngt & Payroll Implementations	30	-7%	28	7%	30	3%	31	6%	33	6%	35	10%	38.5	17%	45	7%	48
CRM Implementations	145	-10%	130	-8%	120	-8%	110	-5%	105	-10%	95	5%	100	10%	110	5%	115
ITSM Help Desk Implementation	20	15%	23	9%	25	-12%	22	-5%	21	5%	22	-9%	20	-5%	19	-16%	16
WCM and E-Commerce Implementations	54	7%	58	7%	62	-3%	60	-33%	40	-13%	35	14%	40	20%	48	8%	52
Marketing Automation Implementations	34	18%	40	5%	42	-5%	40	-10%	36	-31%	25	8%	27	4%	28	7%	30
TOTALS	448	0.67%	451	0.89%	455	-12.97%	396	-9.09%	360	0.00%	360	11.25%	400.5	17.35%	470	2.34%	481

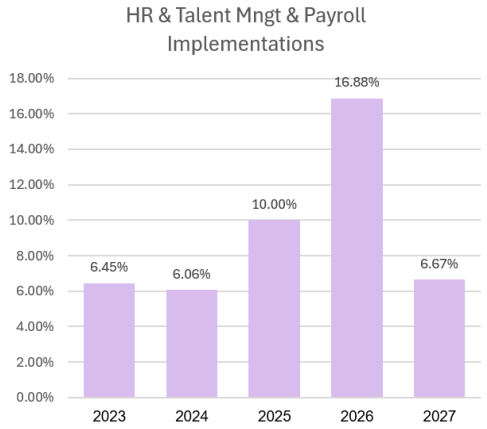
Values in Million USD

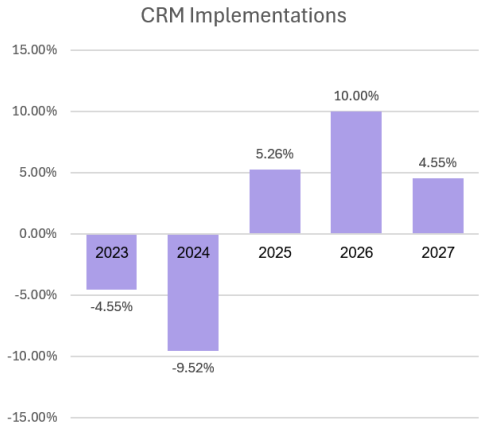
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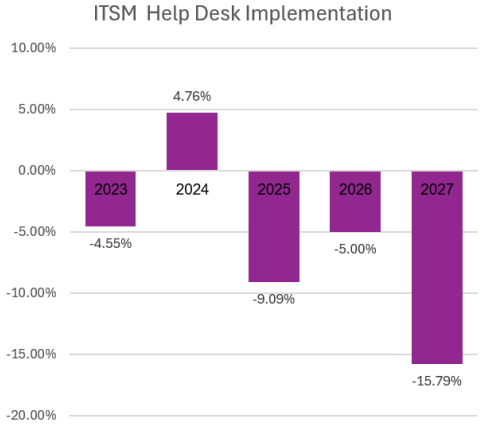
value added services

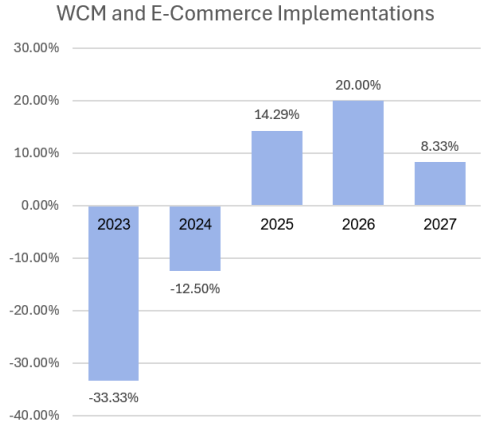
Enterprise Software Implementations Market 2022-2026

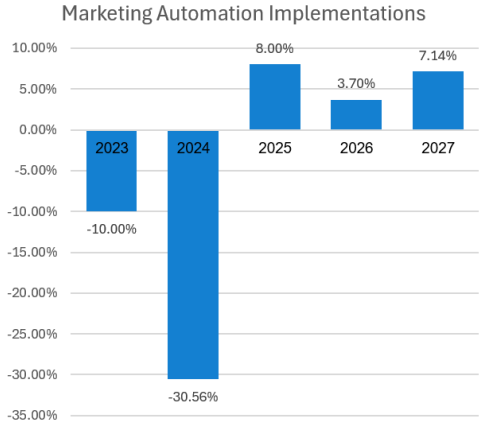








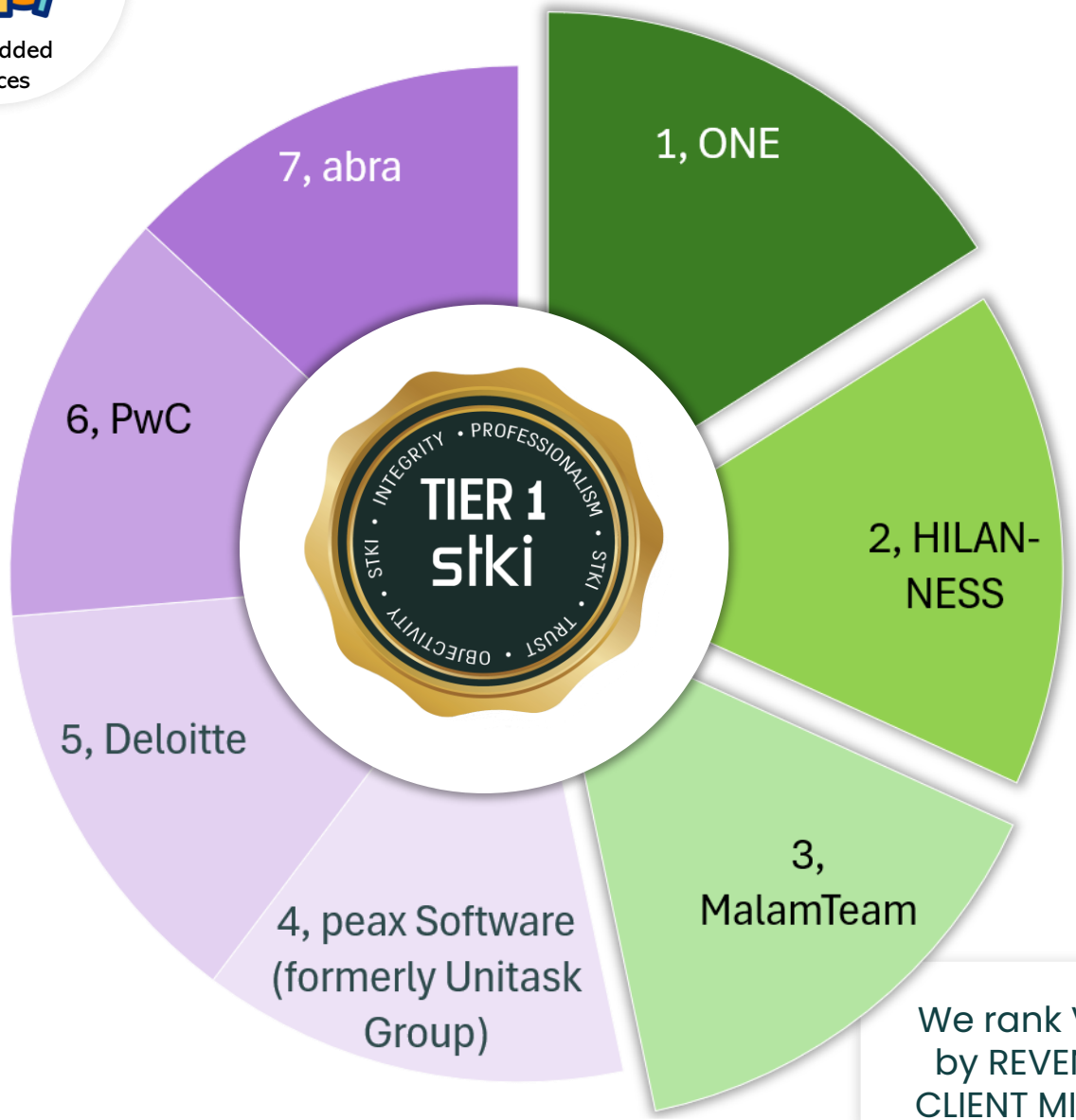


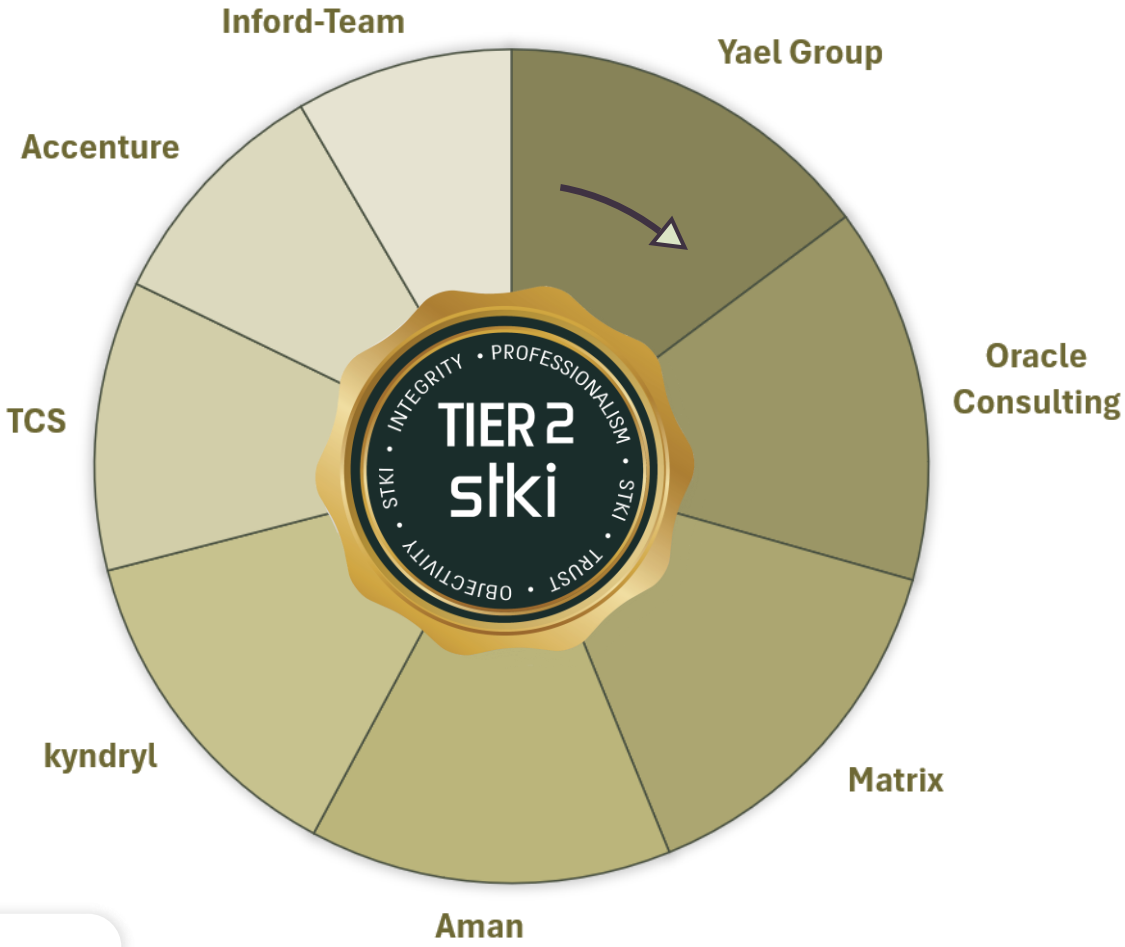


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value added services

ERP Implementations



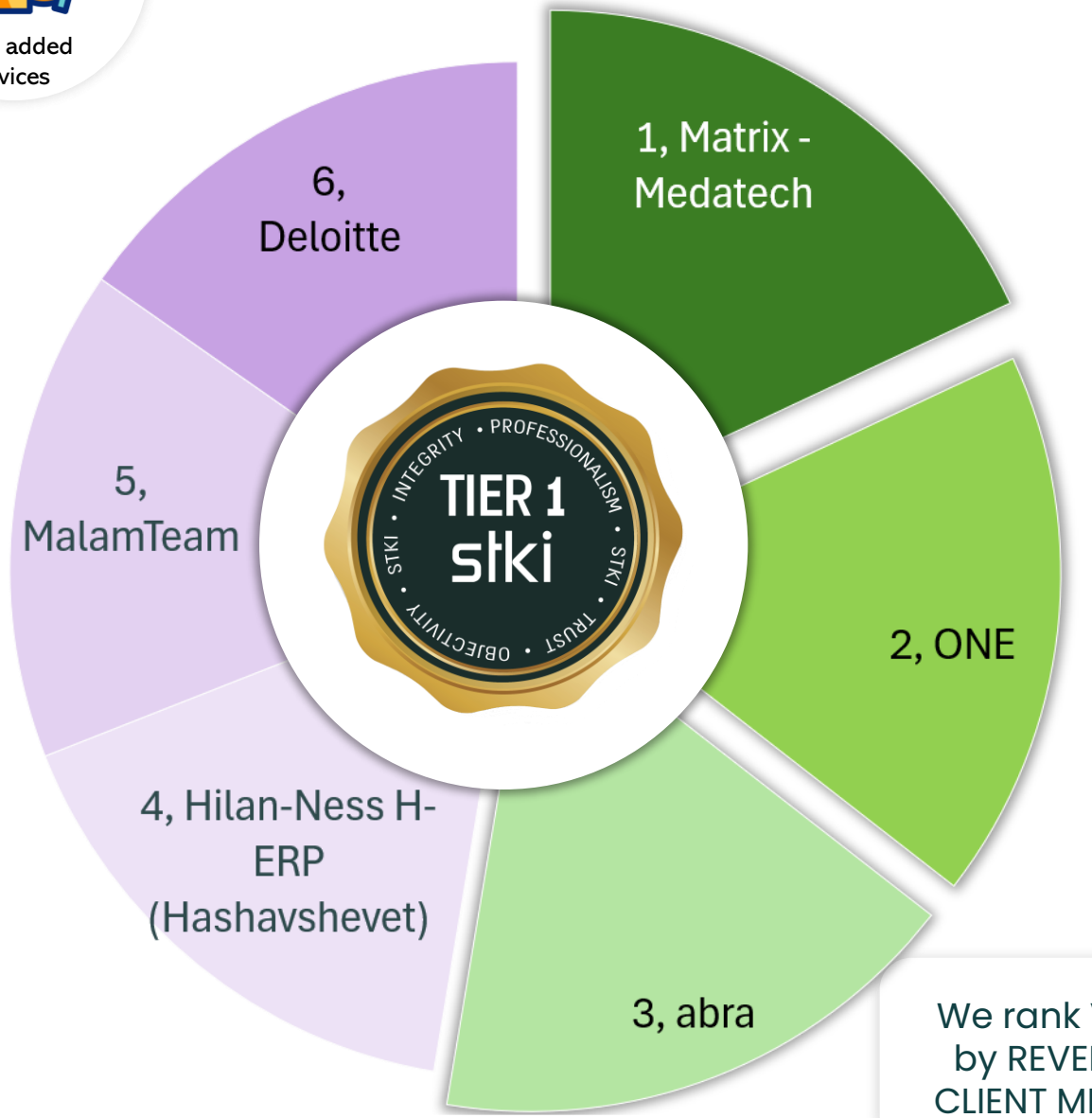


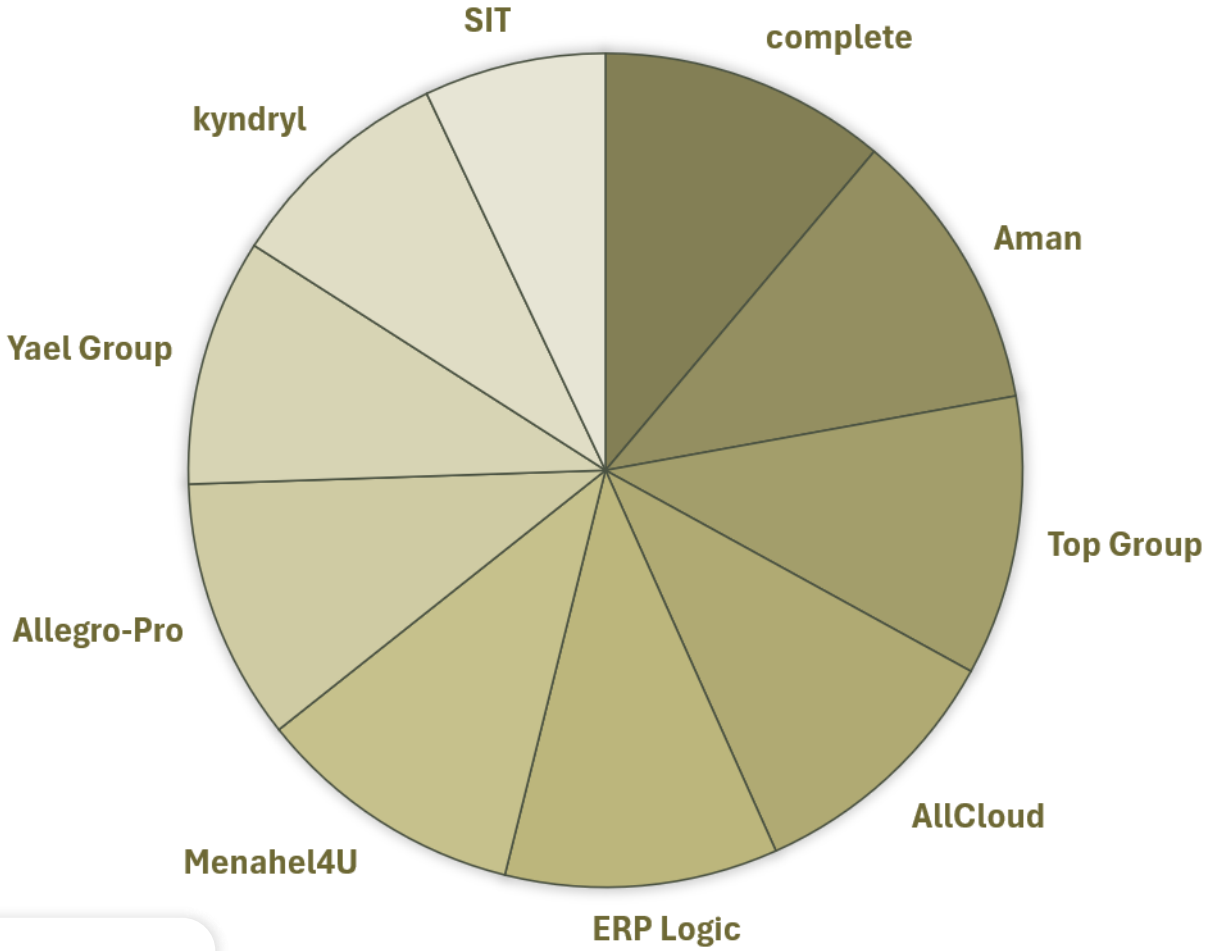
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value added services

ERP Implementations - Mid Market





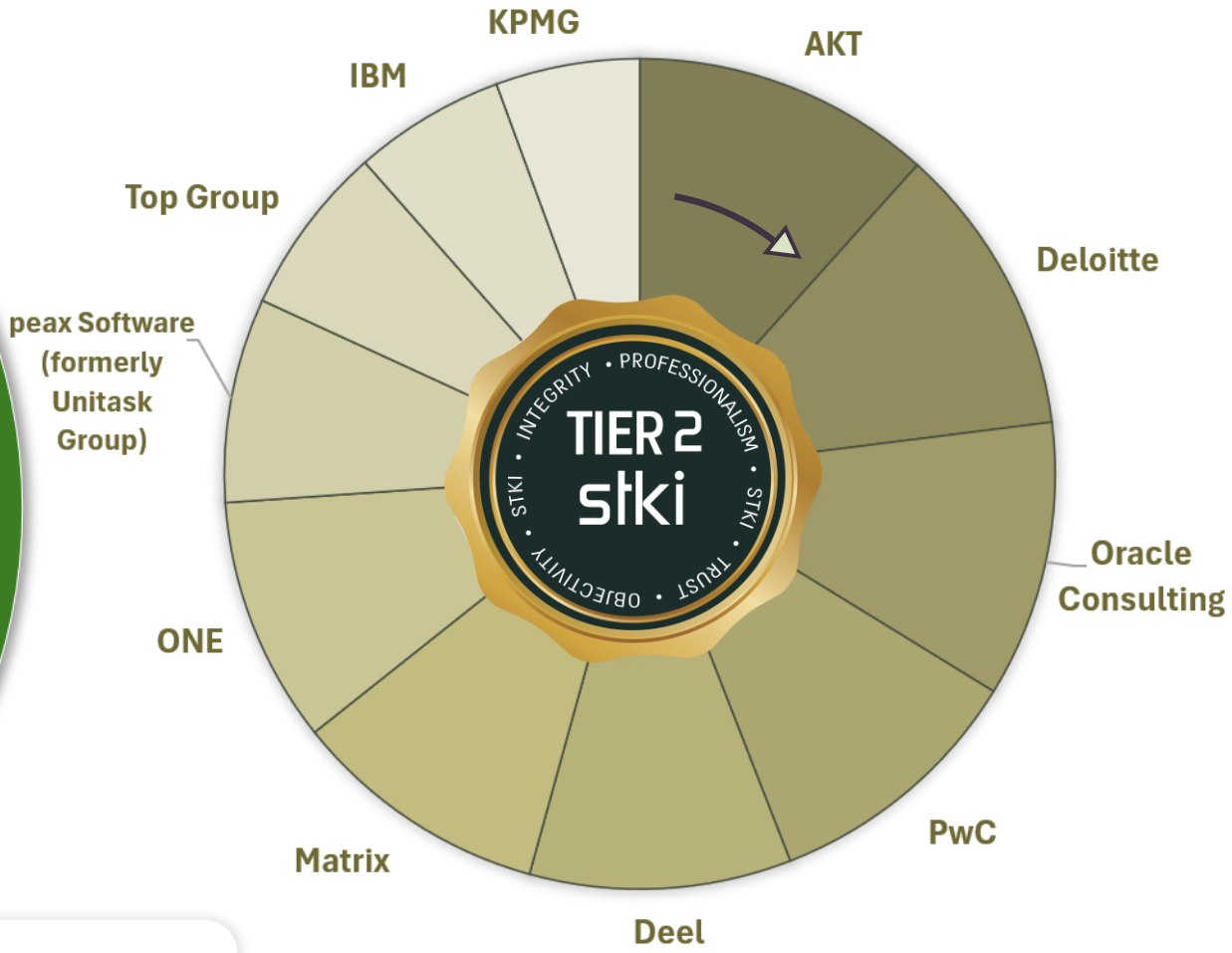
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HR ,Talent Management & Payroll Implementations



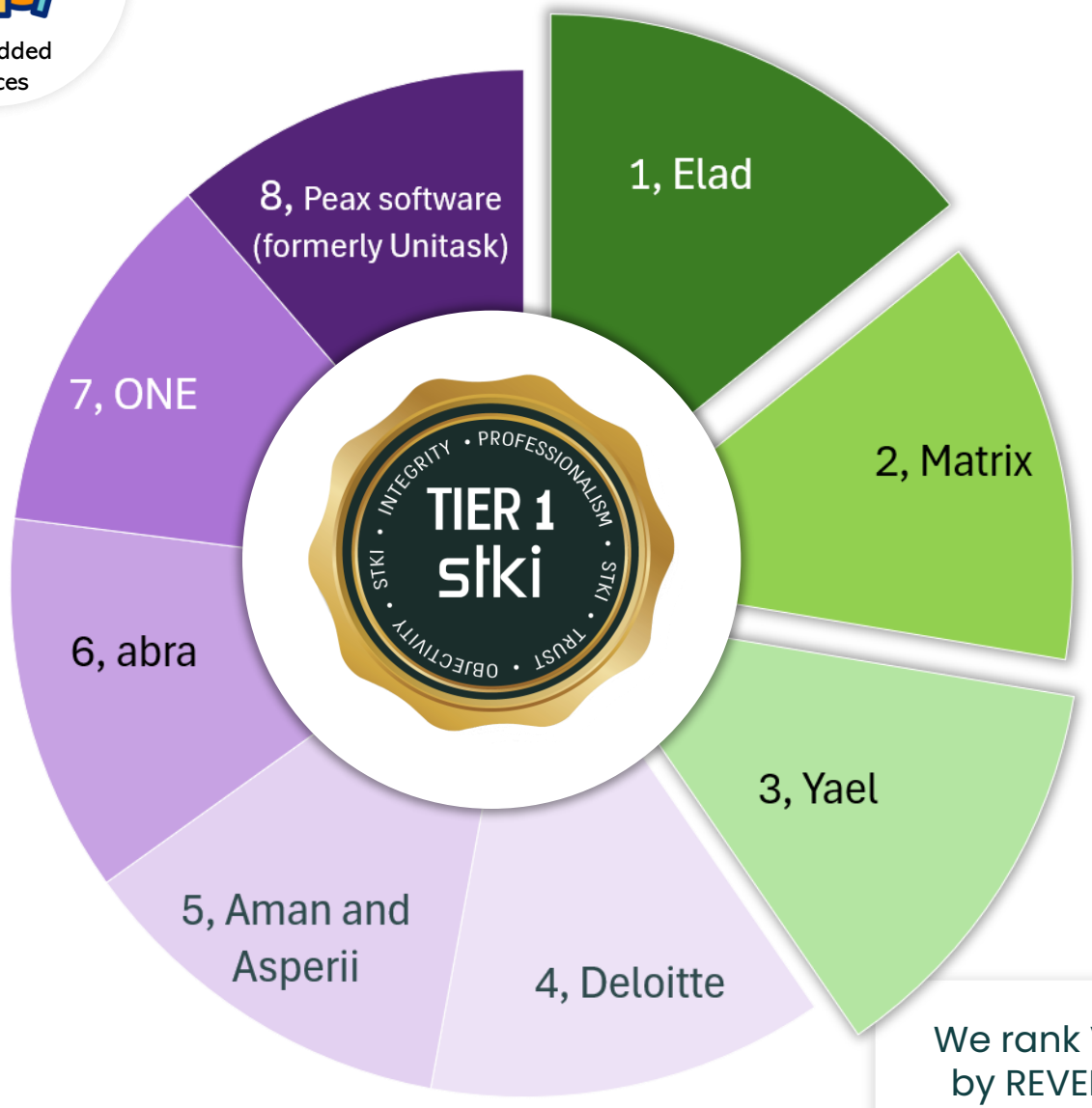


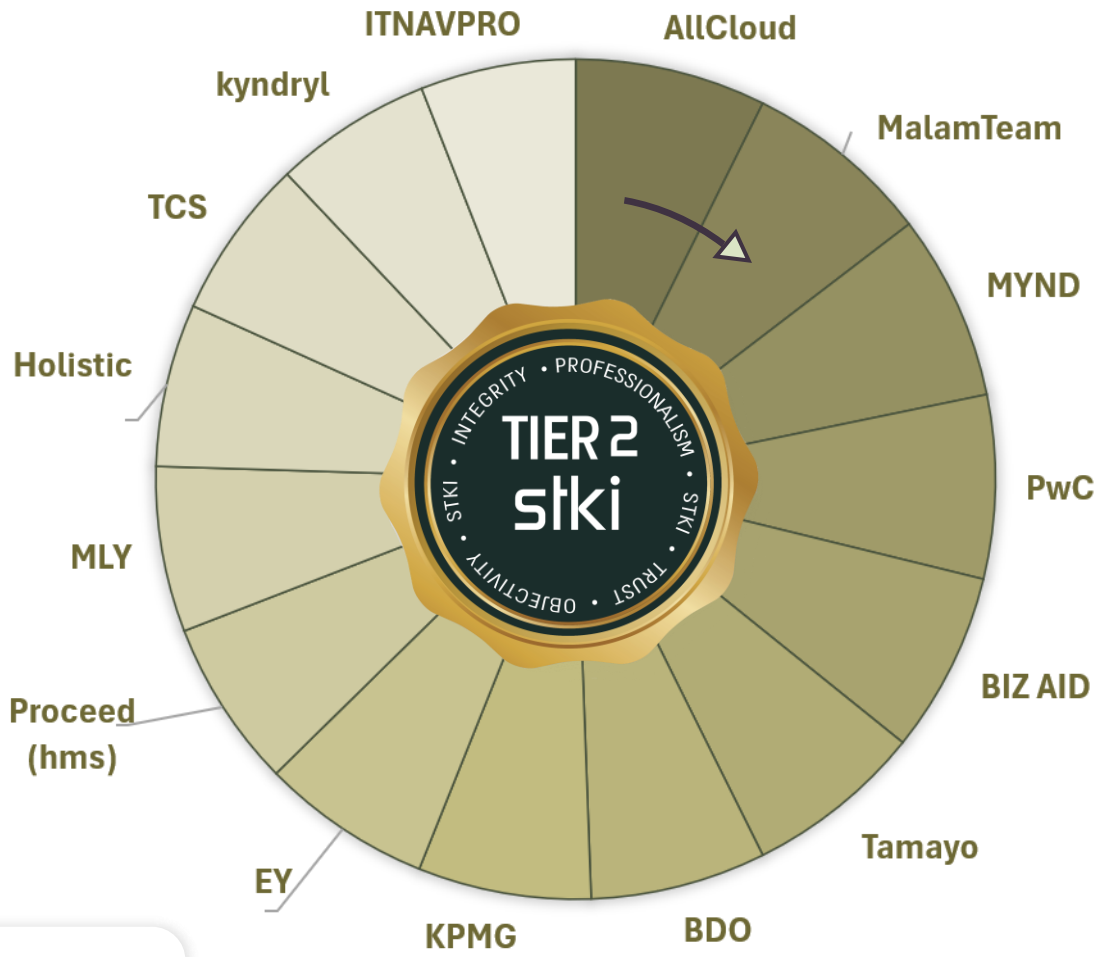
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value added services

CRM Implementations





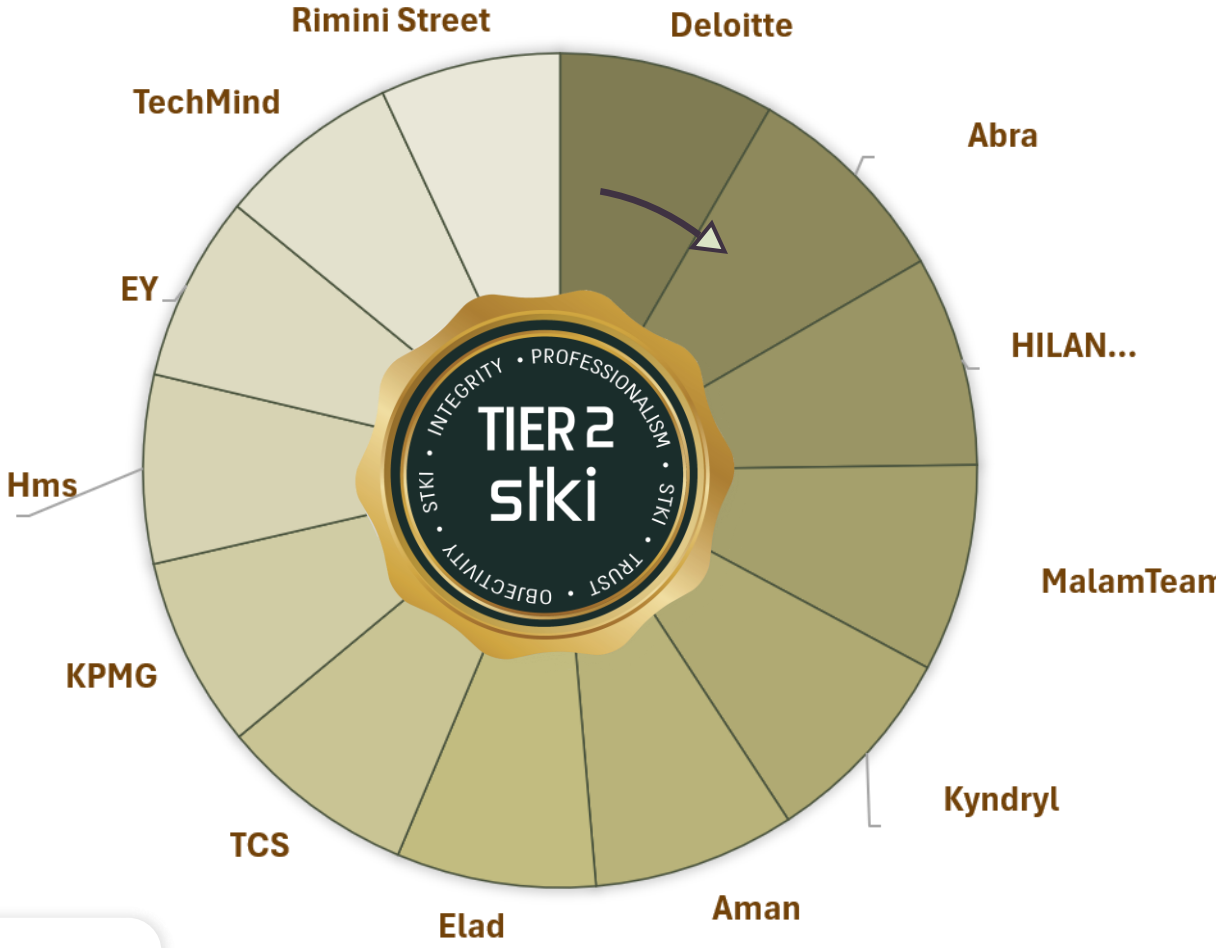
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ITSM Help Desk Implementation



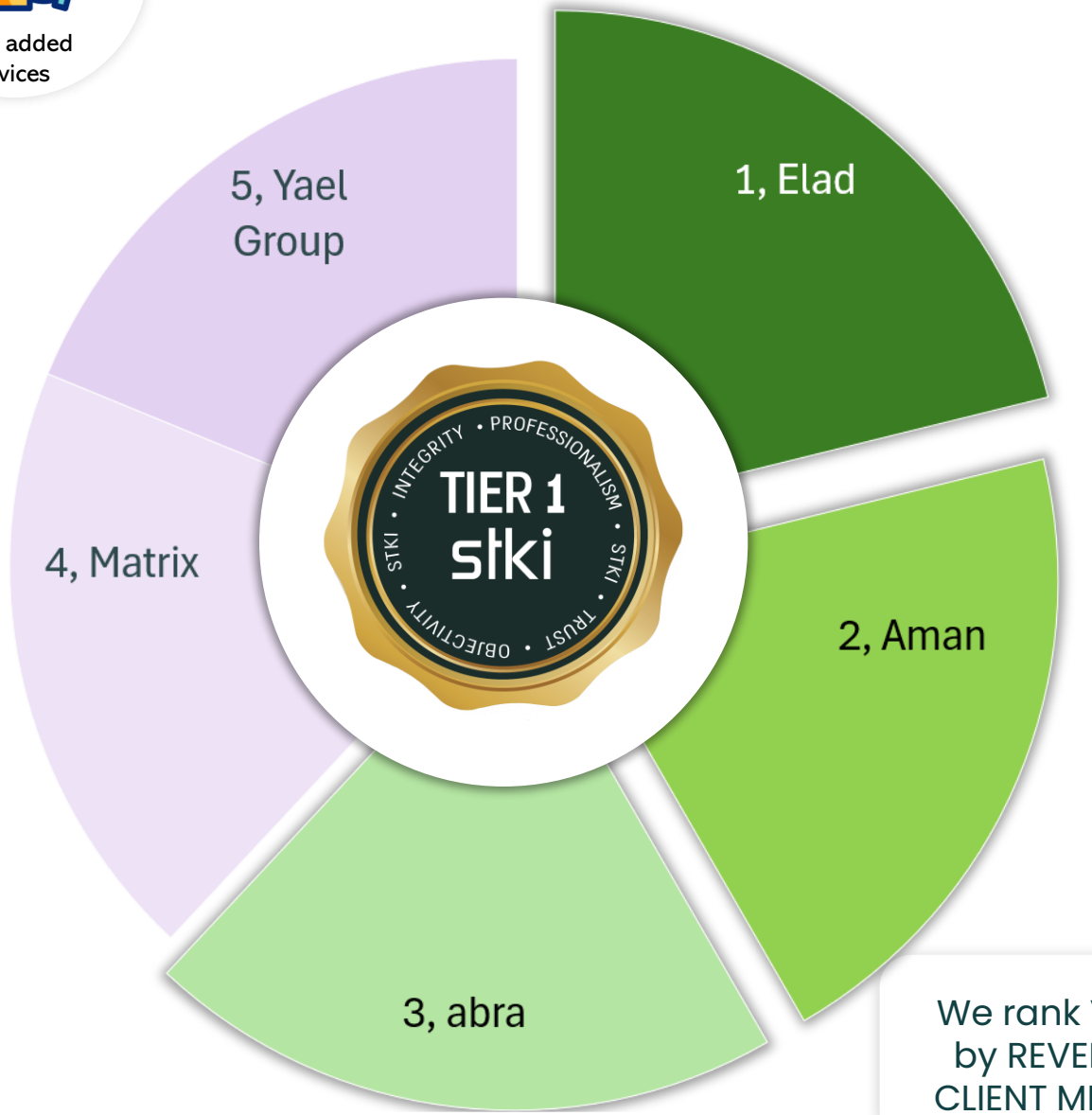


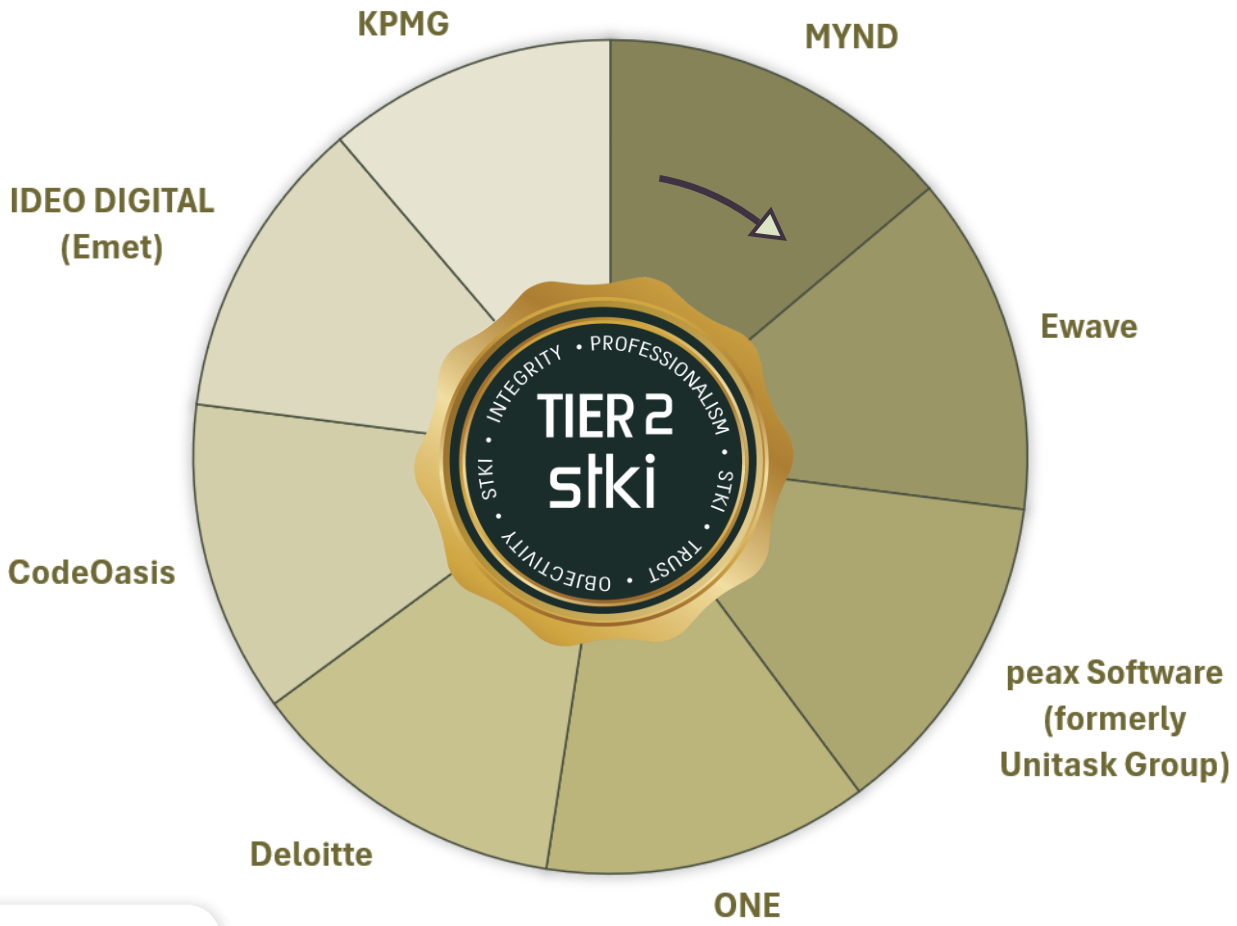
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value added services

WCM & E-Commerce Implementations





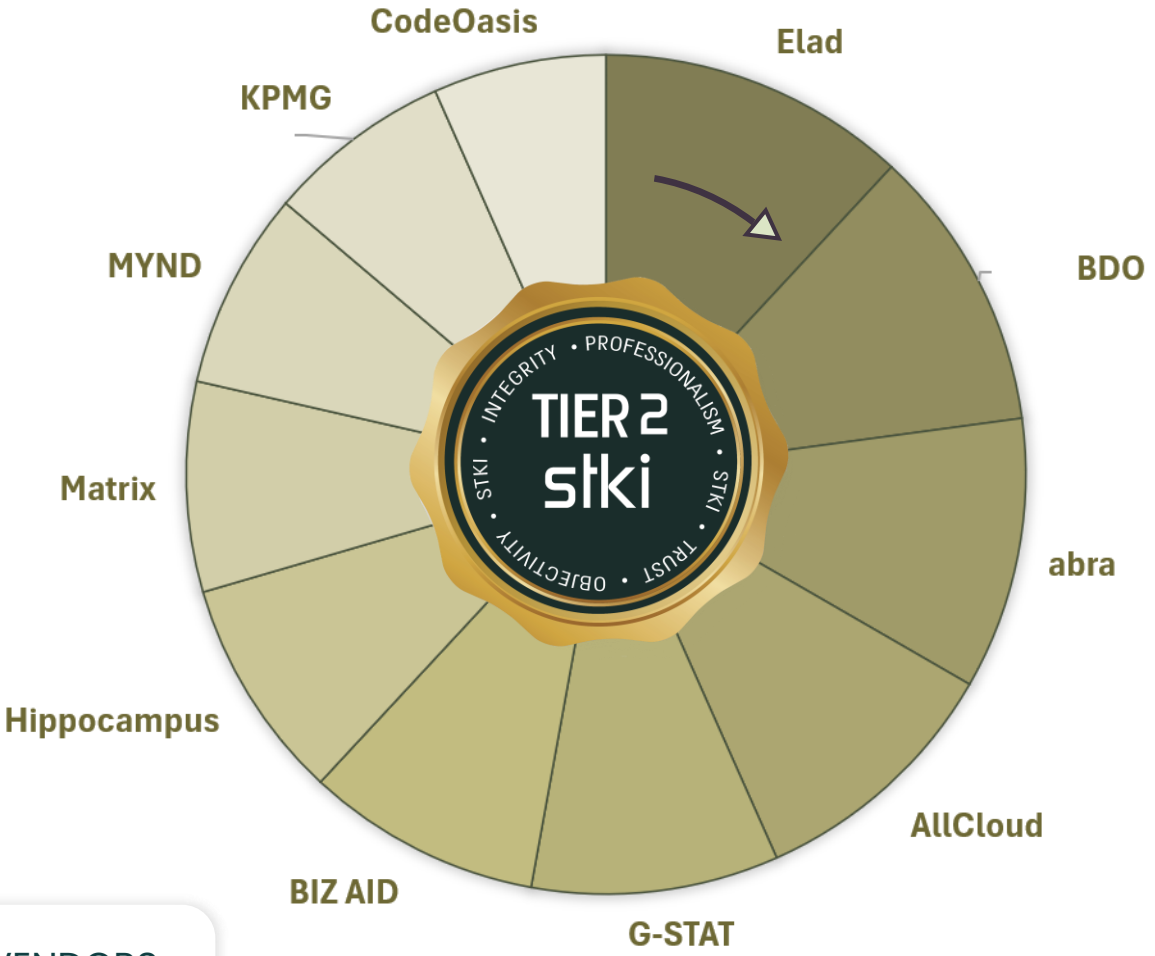
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value added services

Marketing Automation Implementations





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value added services

Data, Analytics, AI & BI Projects 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
Analytical AI (ML) & Data Science projects	66	21%	80	13%	90	-2%	88	2%	90	-11%	80	11%	89	11%	99	0%	99
Data management projects (quality, ETL, catalogs)	67	7%	72	-4%	69	-6%	65	-3%	63	3%	65	2%	66	2%	67	0%	67
Data Platforms implementation Projects (DWs, Data Lakes and Lakehouses)		#DIV/0!	18	22%	22	18%	26	15%	30	143%	73	10%	80	6%	85	6%	90
TOTALS	133	27.82%	170	6.47%	181	-1.10%	179	2.23%	183	19.13%	218	7.80%	235	6.81%	251	1.99%	256

Values in Million USD

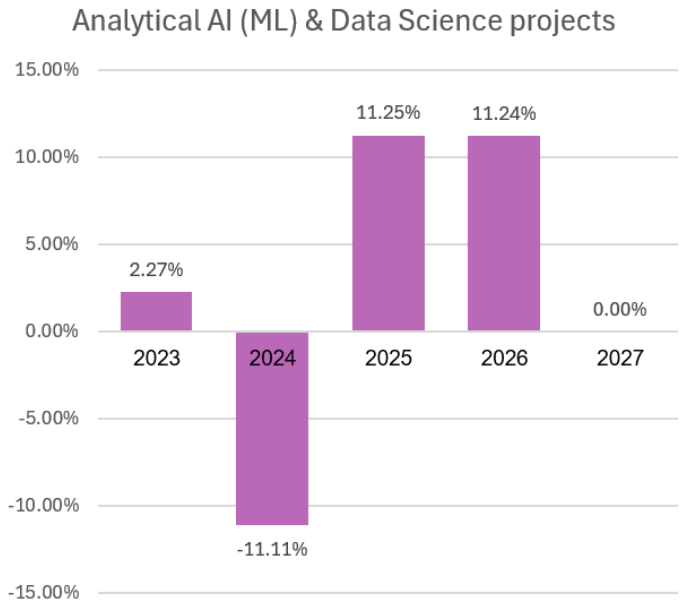


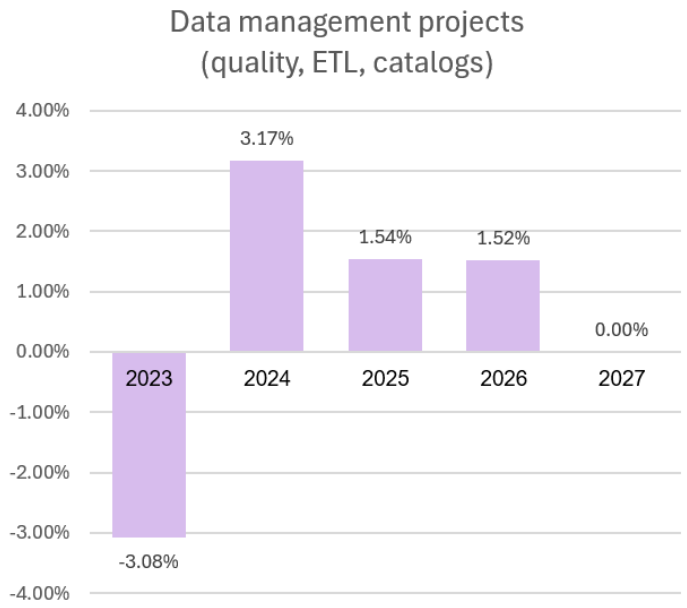
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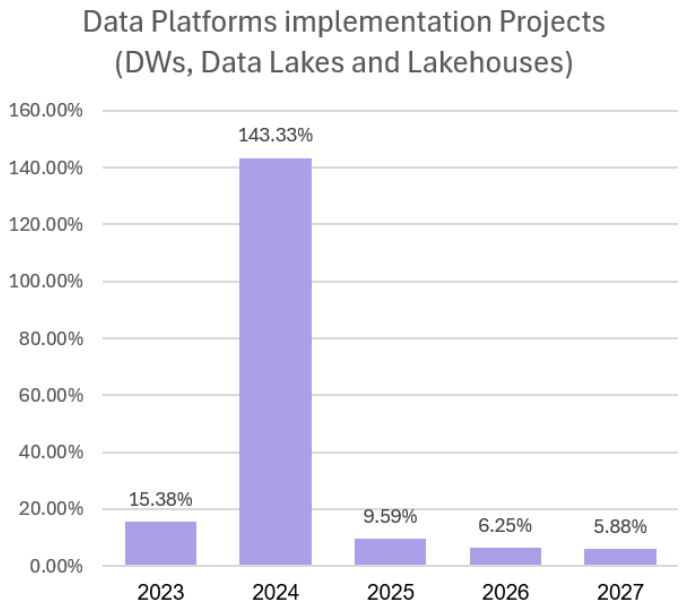
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value added services

Data, Analytics, AI & BI Projects Market 2022-2026



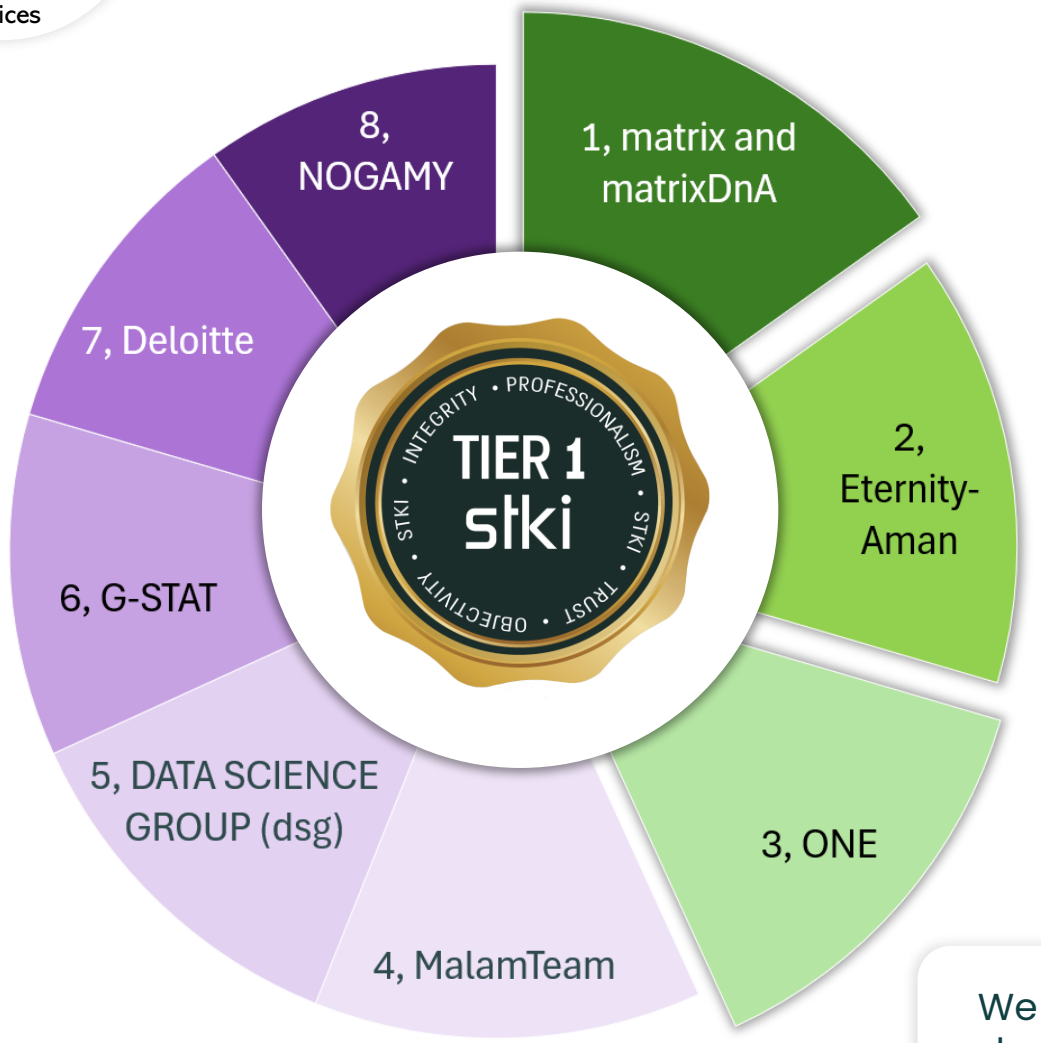


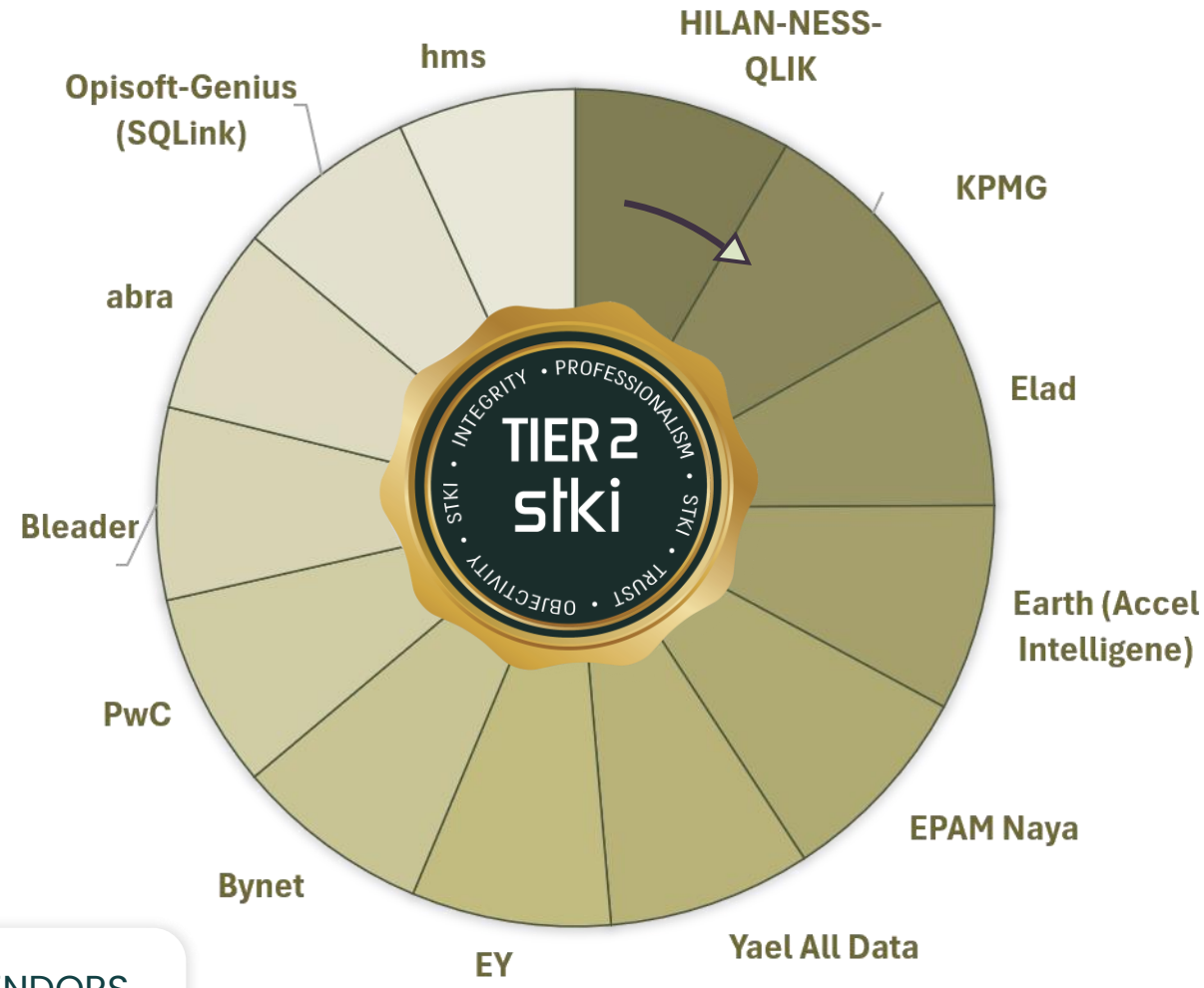


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value added services

Analytical AI (ML) & Data Science projects





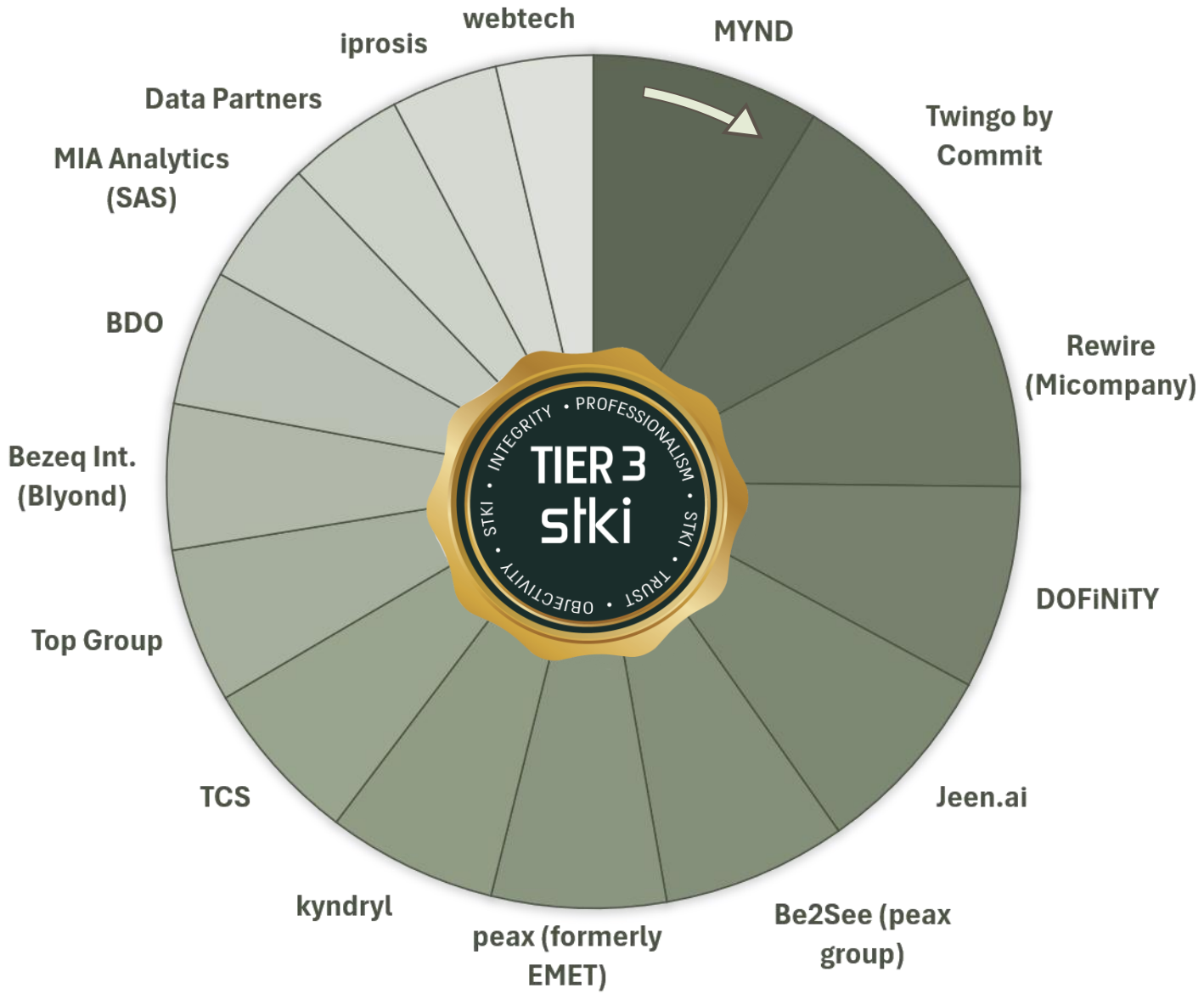
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Analytical AI (ML) & Data Science projects

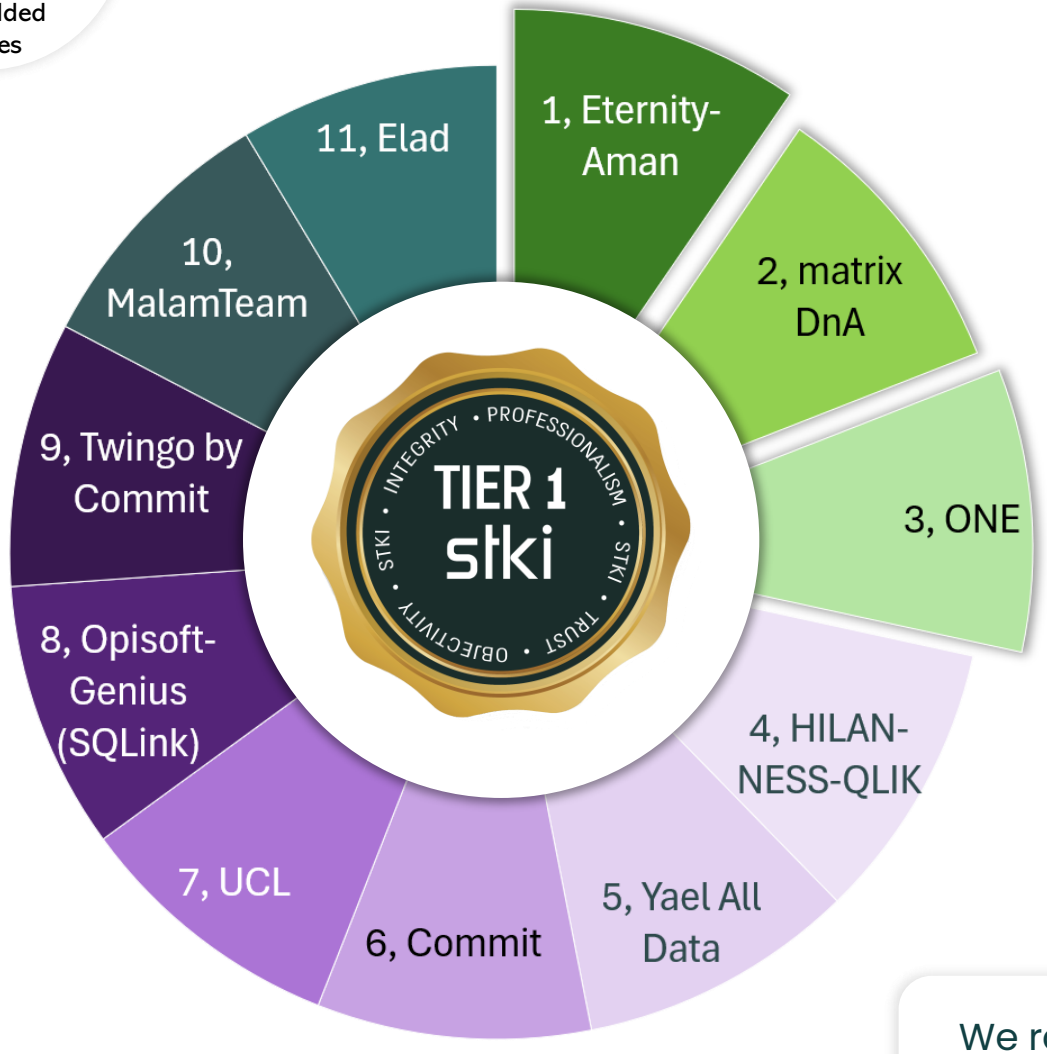
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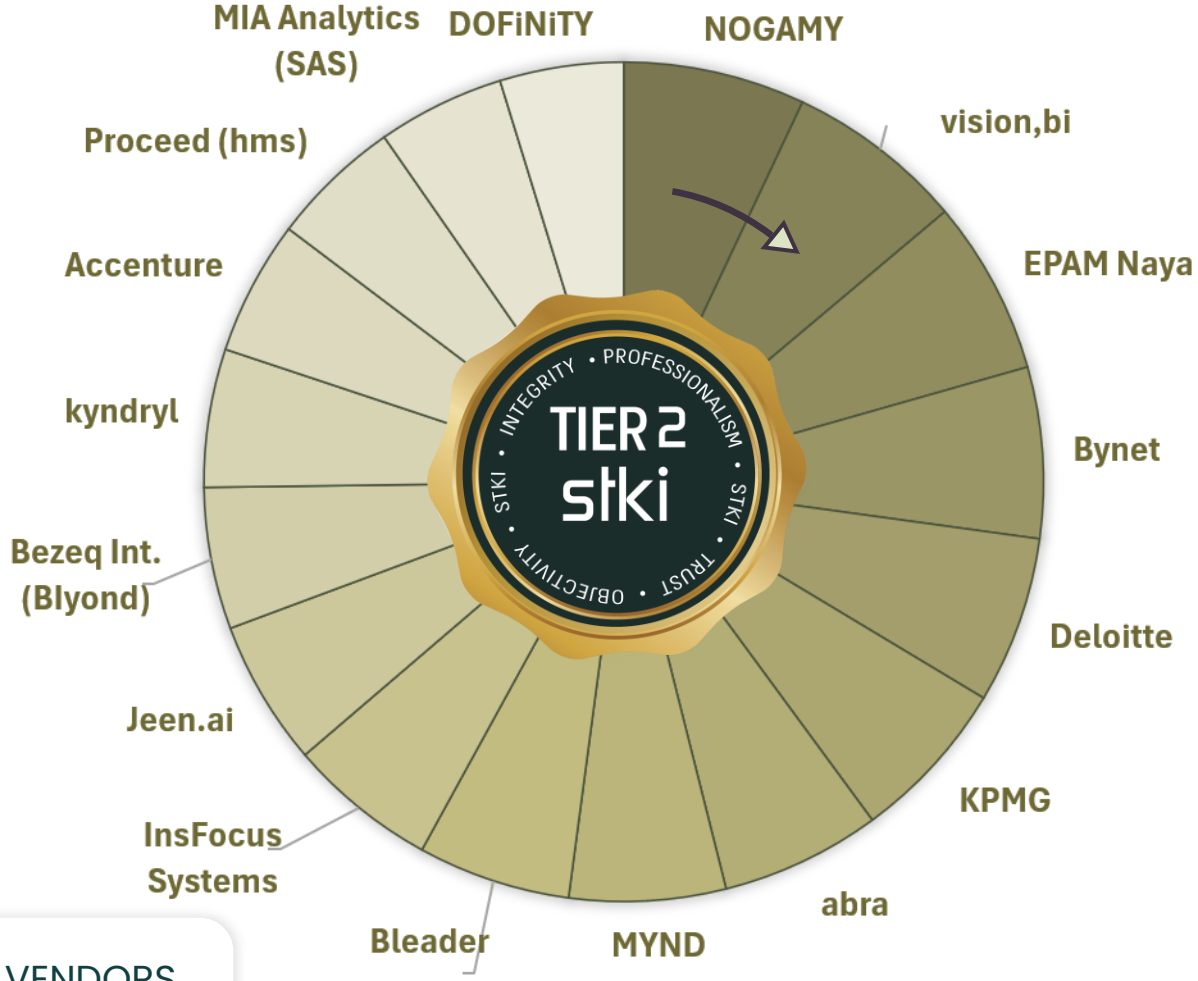


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Data Management implementation (quality, ETL, catalogs)





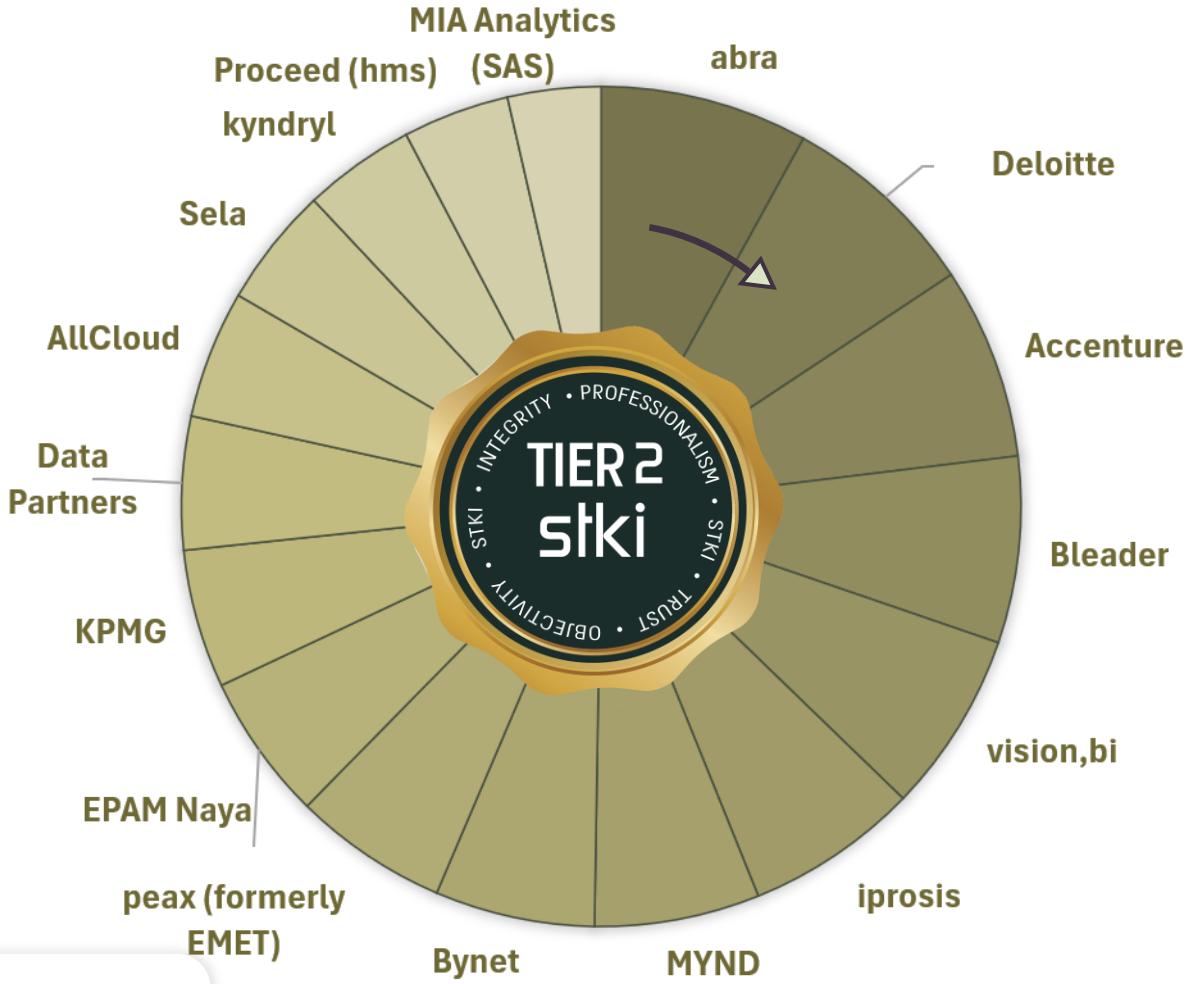
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Data Platforms Projects





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value added services

Business Applications Development & Implementations 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
General Software Development	95	37%	130	-4%	125	-4%	120	25%	150	-13%	130	12%	145	10%	160	13%	180
GIS Implementations	29	10%	32	13%	36	14%	41	12%	46	9%	50	8%	54	7%	58	3%	60
Product Design (CX, UX)	103	12%	115	4%	120	4%	125	-16%	105	-19%	85	-12%	75	-7%	70	-7%	65
TOTALS	227	22.03%	277	1.44%	281	1.78%	286	5.24%	301	-11.96%	265	3.40%	274	5.11%	288	5.90%	305

Values in Million USD

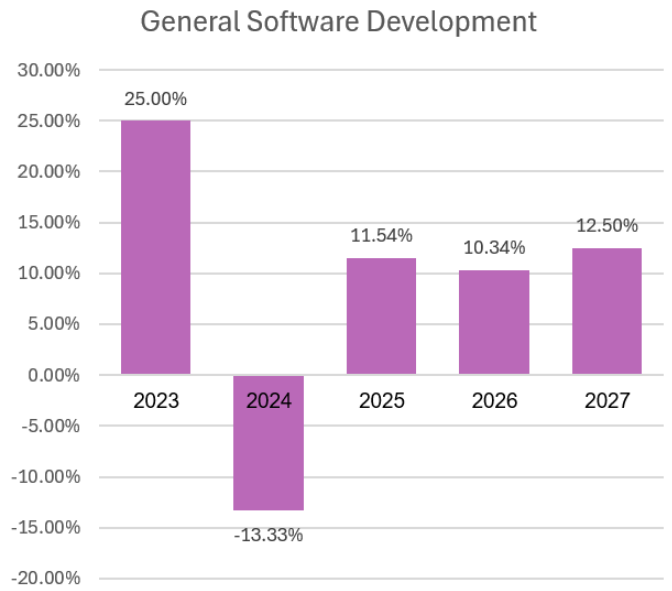


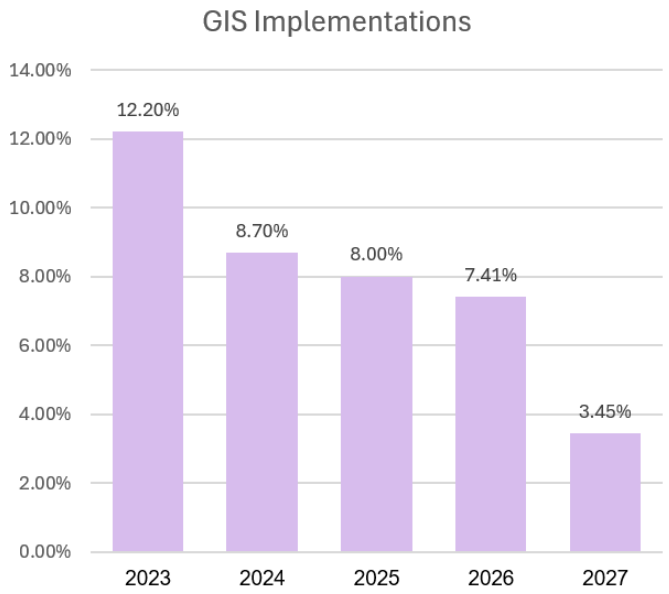
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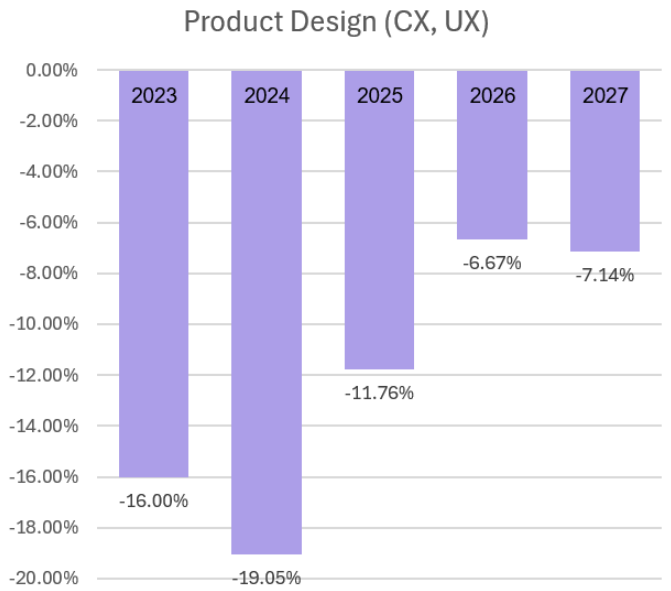
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value added services

Business Applications Development & Implementations Market 2022-2026



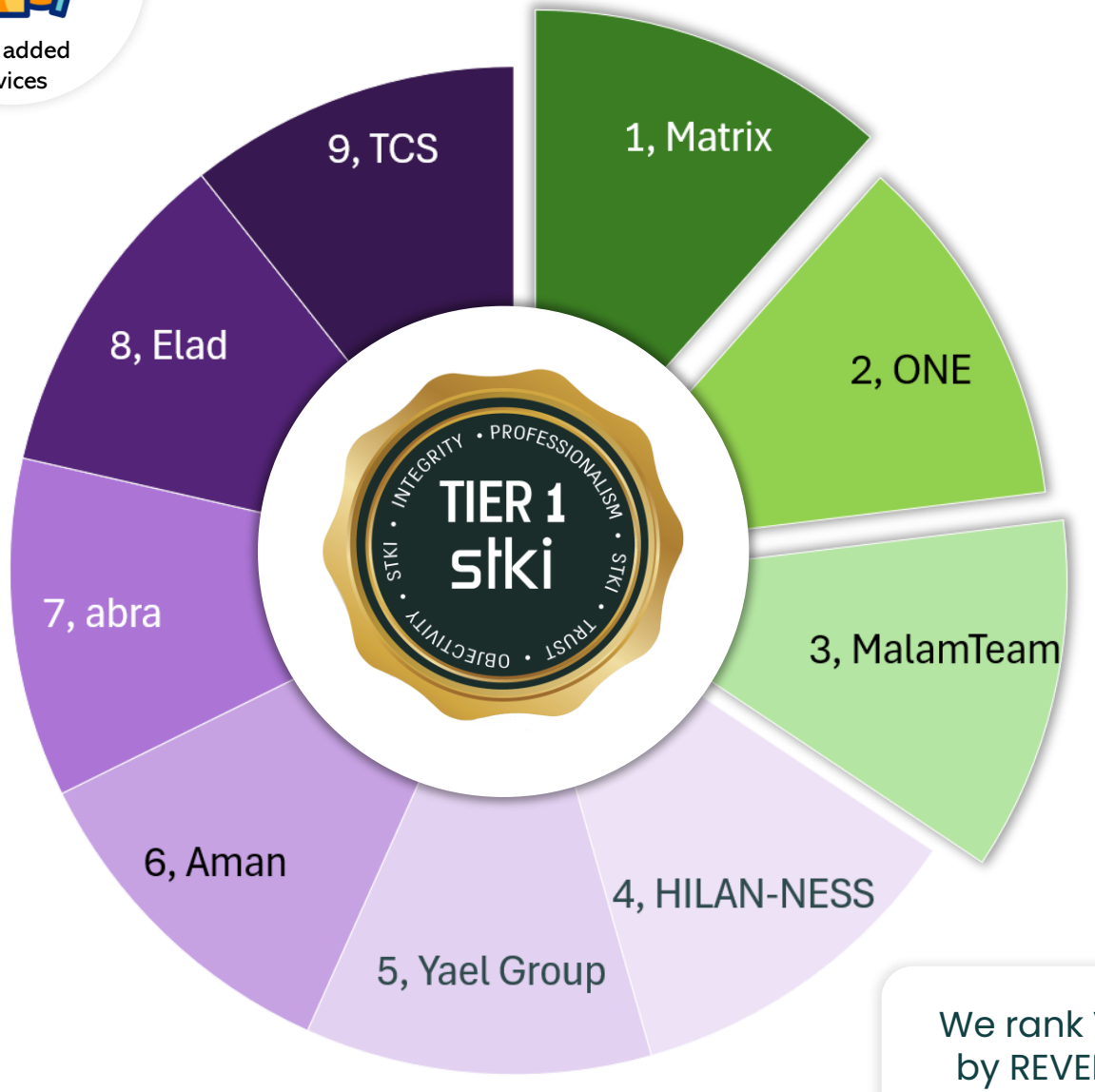


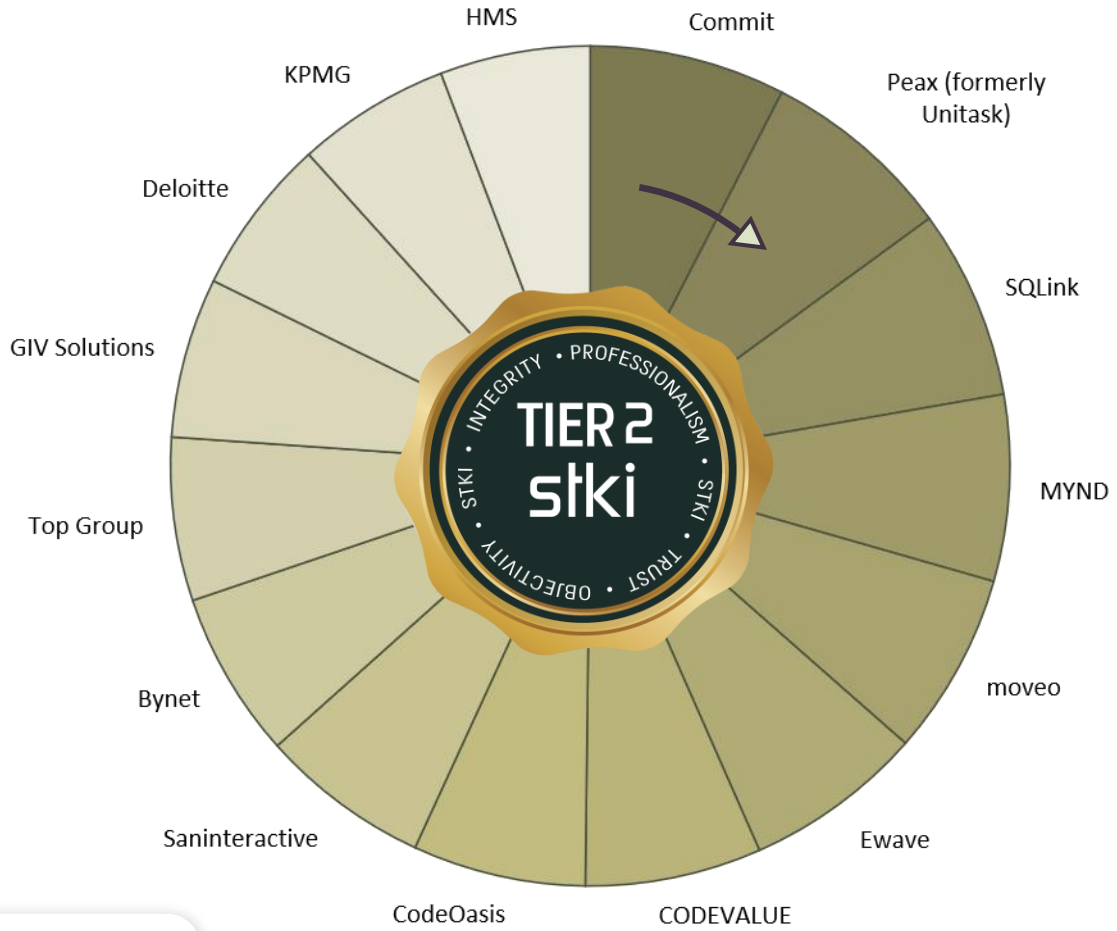


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value added services

General Software Development Projects





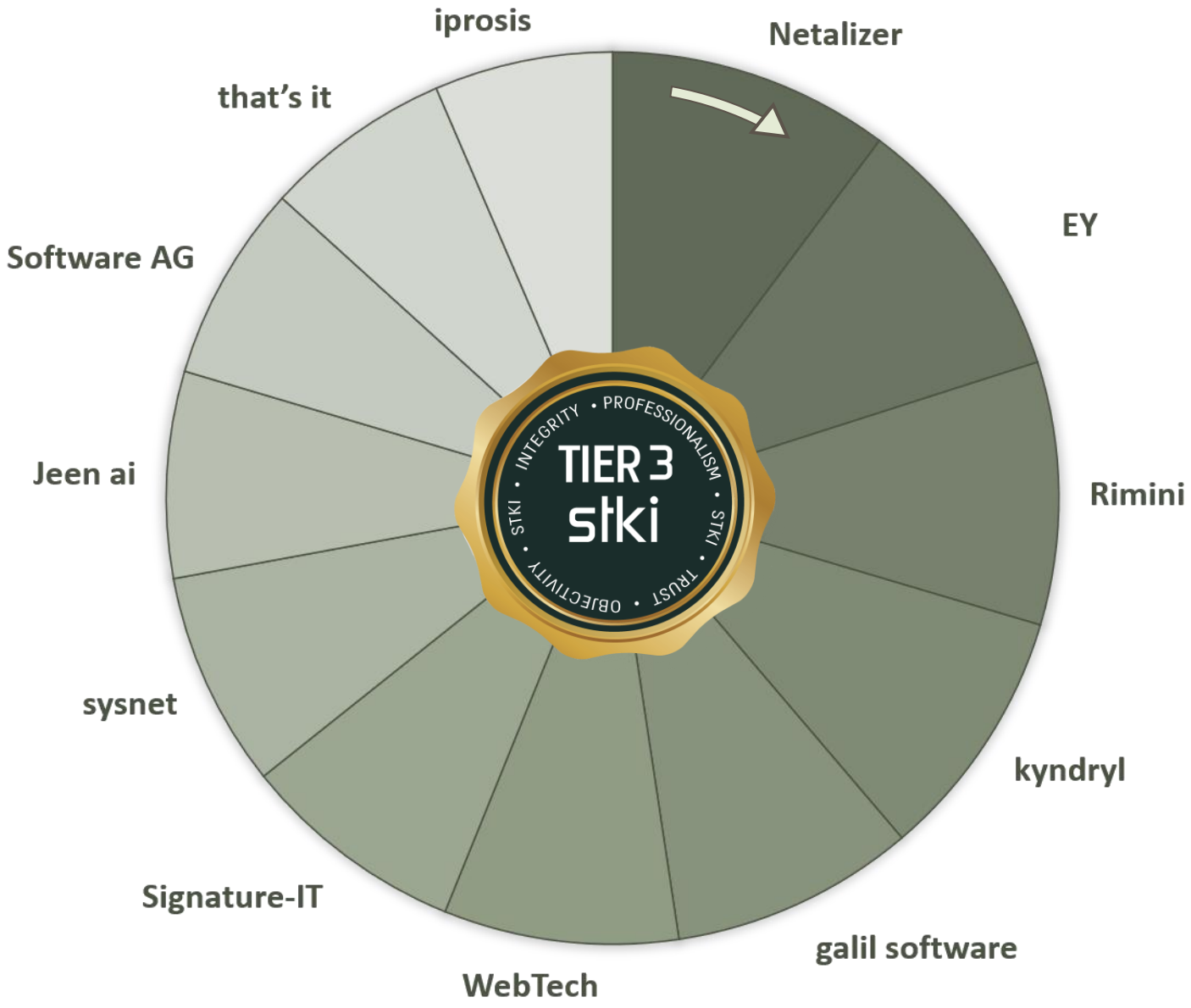
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General Software Development Projects

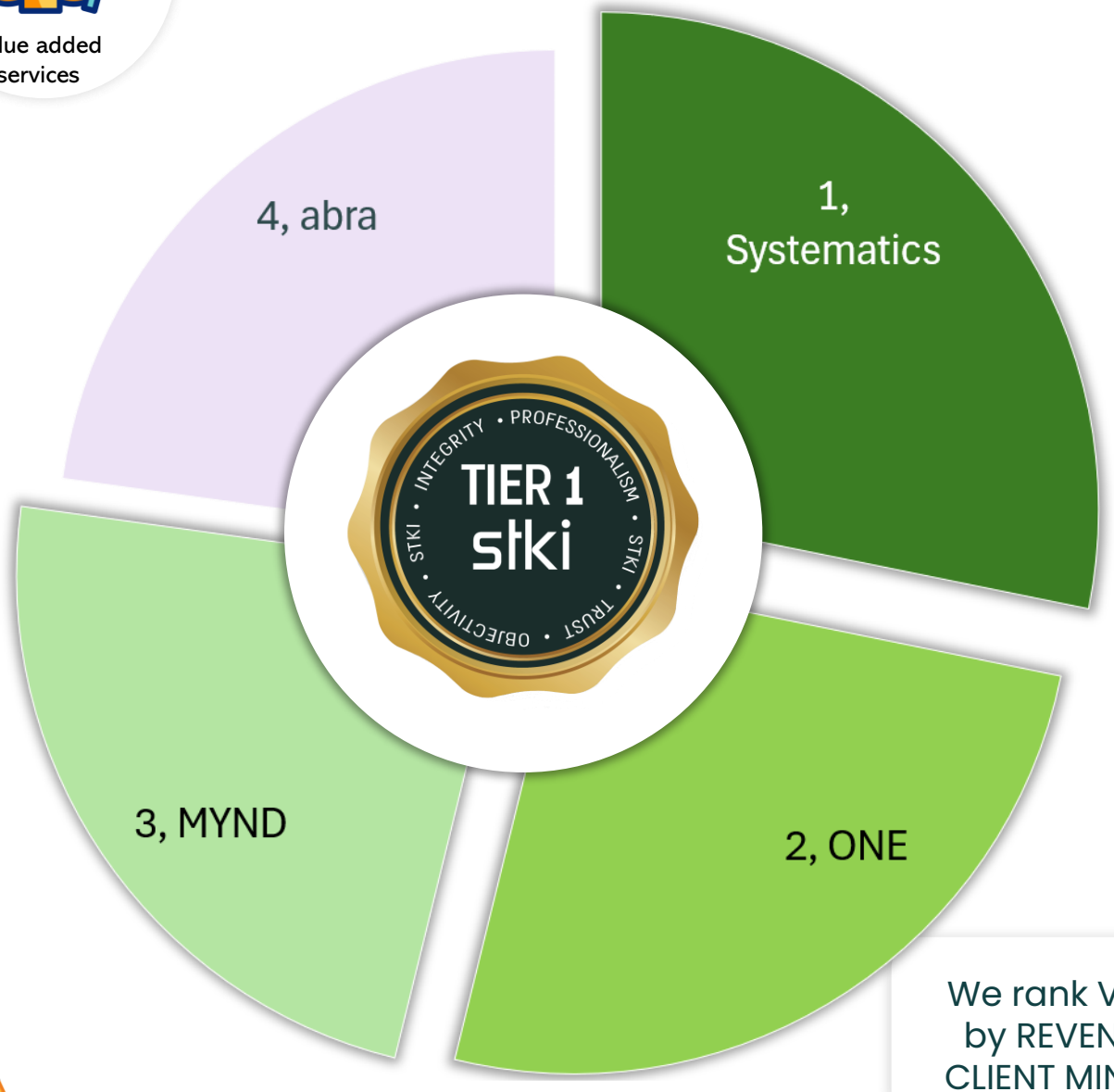
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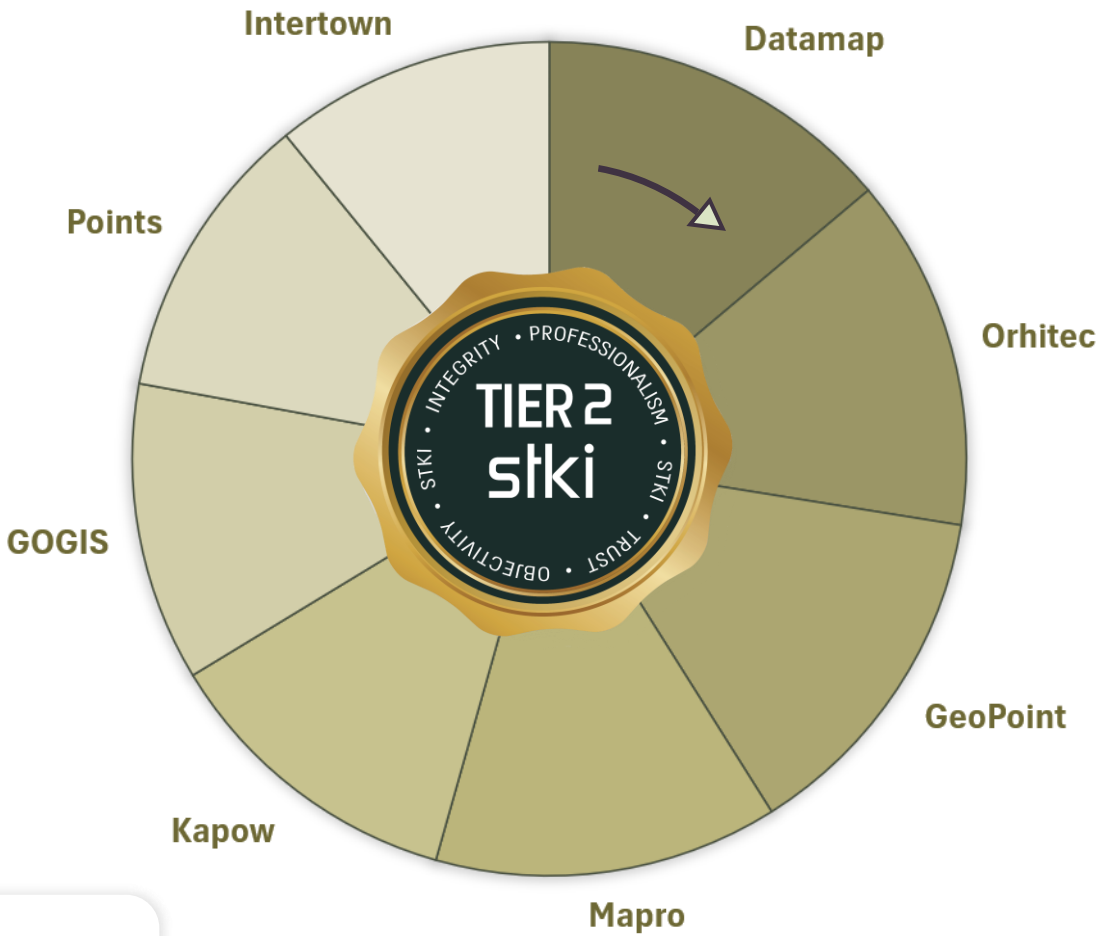


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GIS Implementations





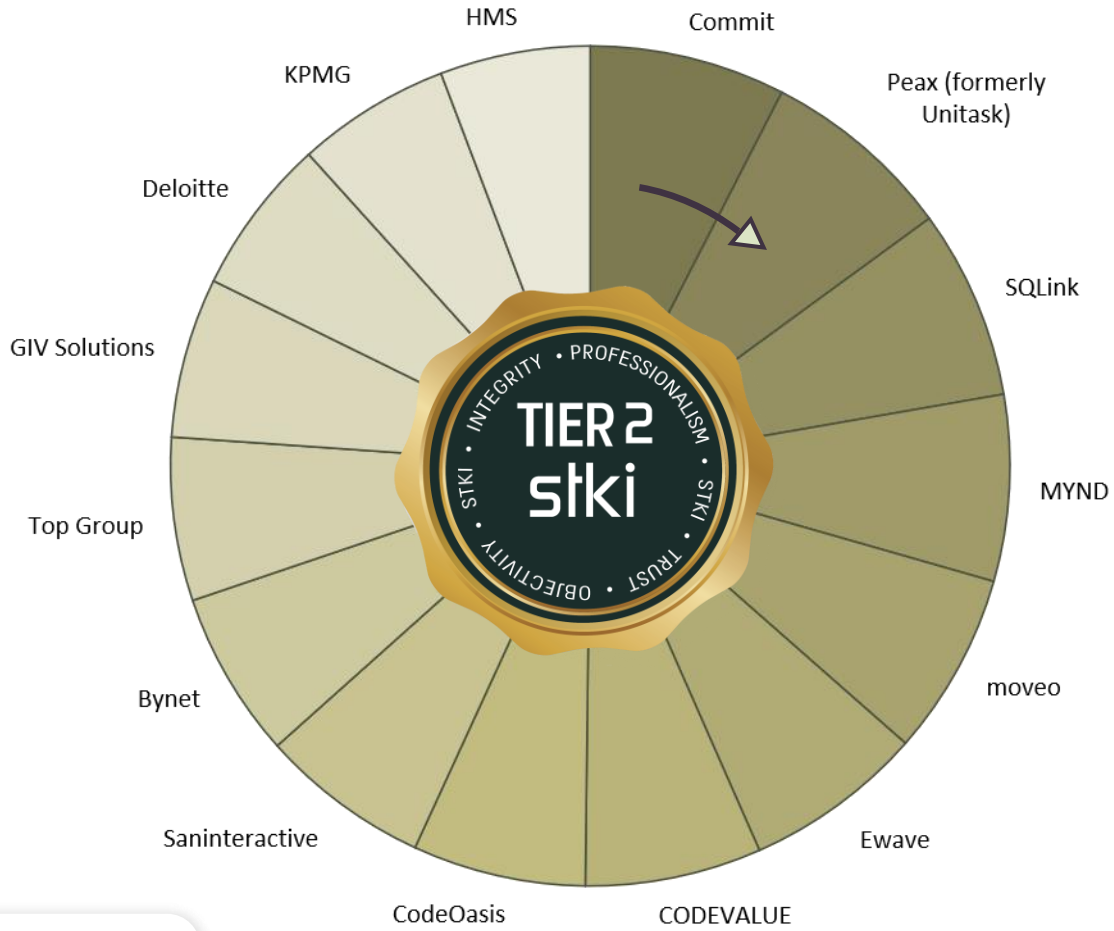
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value added services

Product Design (CX, UX)





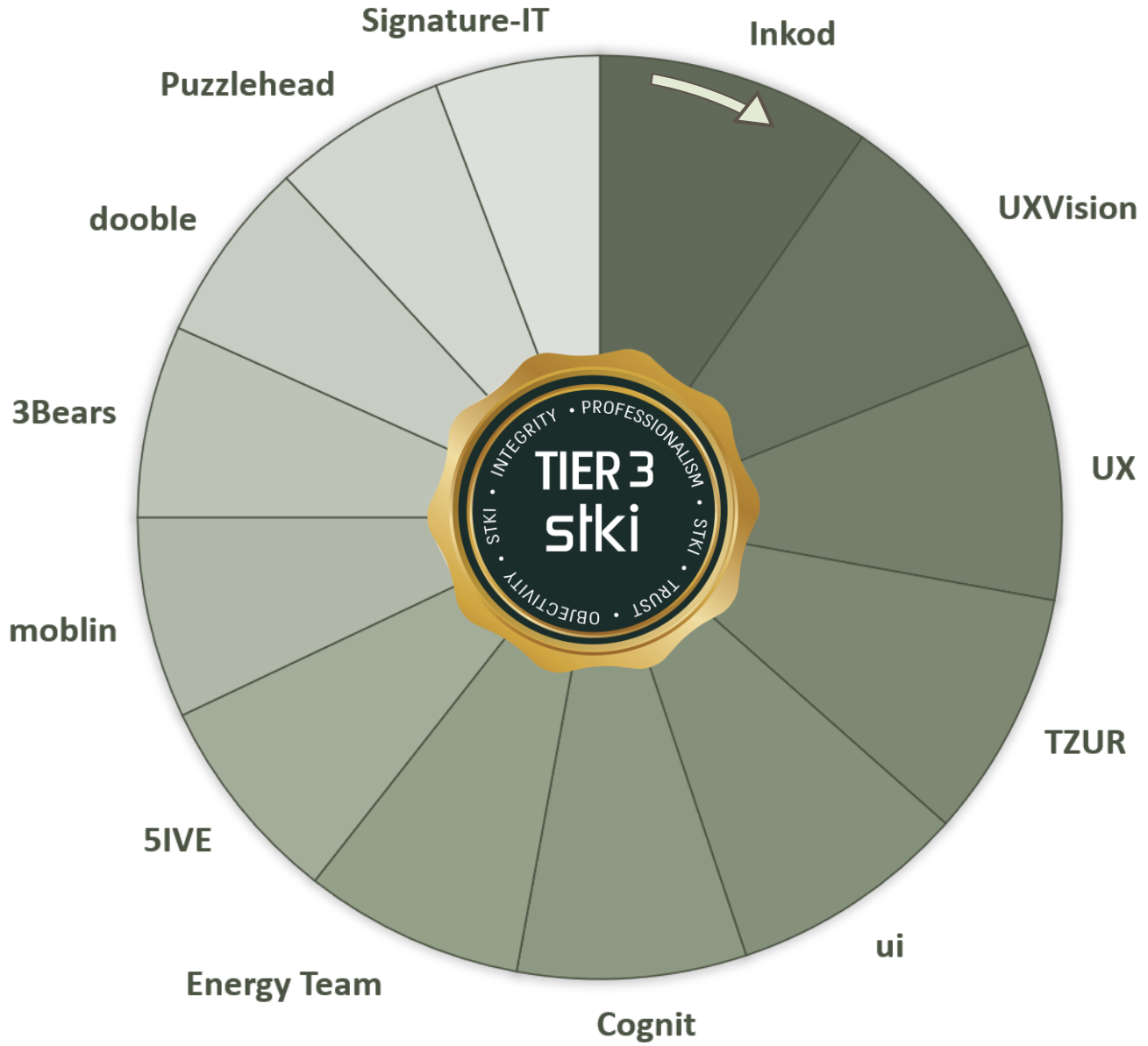
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Product Design (CX, UX)



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value added services

Industry Specific & Special Purpose Development & Implementations 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
Finance Industry Core Projects	120	4%	125	-20%	100	5%	105	-10%	95	-5%	90	11%	100	10%	110	9%	120
Transportation	65	8%	70	9%	76	-3%	74	-5%	70	-7%	65	8%	70	4%	73	4%	76
e-payments Projects		#DIV/0!		#DIV/0!	10	40%	14	7%	15	13%	17	29%	22	23%	27	11%	30
Defence Projects	36	6%	38	5%	40	75%	70	21%	85	6%	90	11%	100	10%	110	9%	120
Retail Projects	32	13%	36	17%	42	17%	49	4%	51	4%	53	4%	55	4%	57	5%	60
Healthcare Projects (core, telemedicine, etc)	69	9%	75	8%	81	9%	88	8%	95	3%	98	5%	103	7%	110	9%	120
Public (government) modernizations	47	9%	51	4%	53	4%	55	5%	58	3%	60	8%	65	15%	75	20%	90
TOTALS	369	7.05%	395	1.77%	402	13.18%	455	3.08%	469	0.85%	473	8.88%	515	9.13%	562	9.61%	616

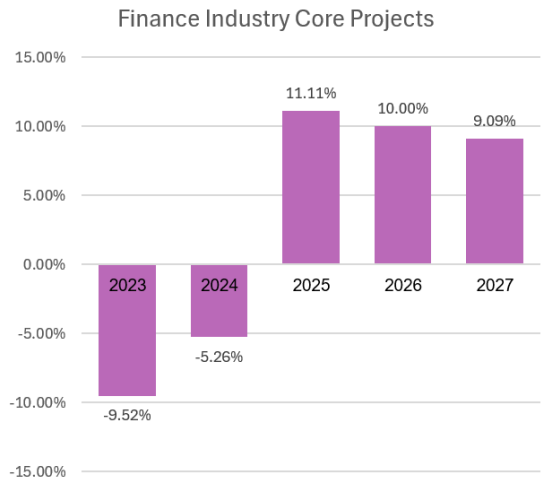
Values in Million USD

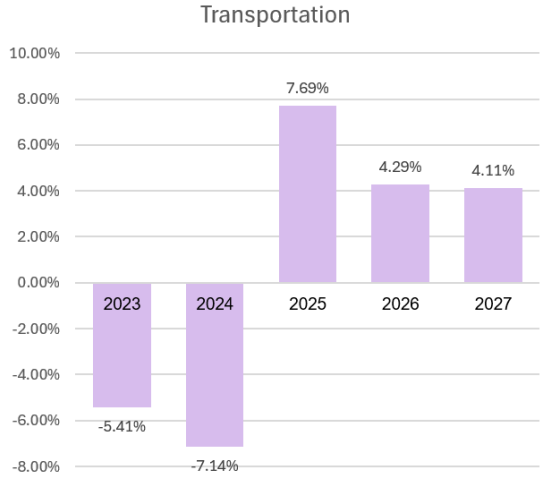


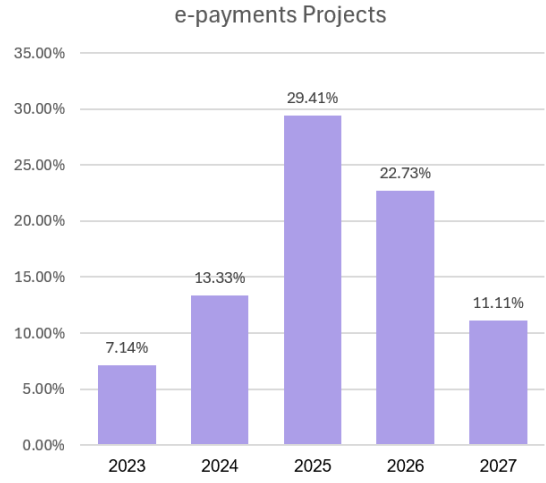
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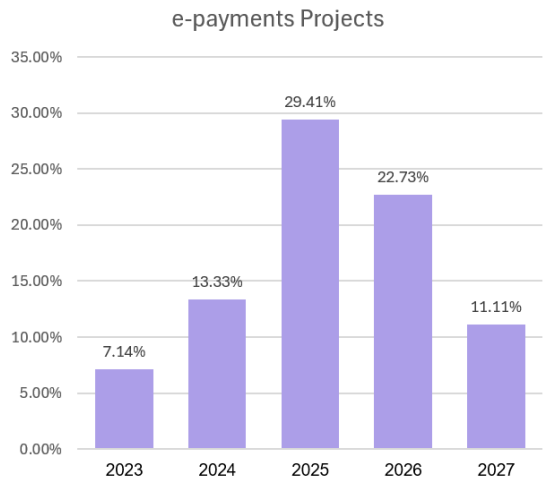
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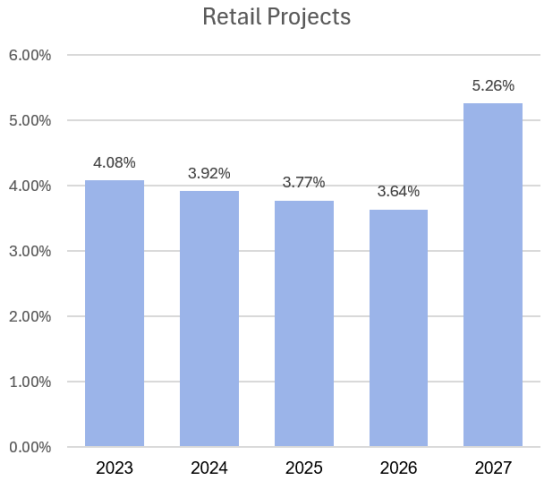
Industry Specific & Special Purpose Development & Implementations Market 2022-2026

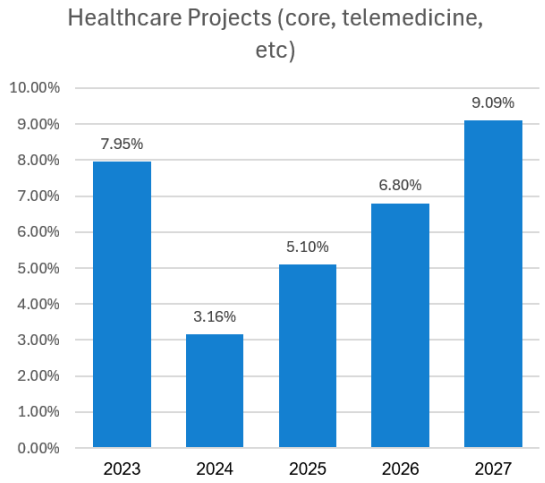


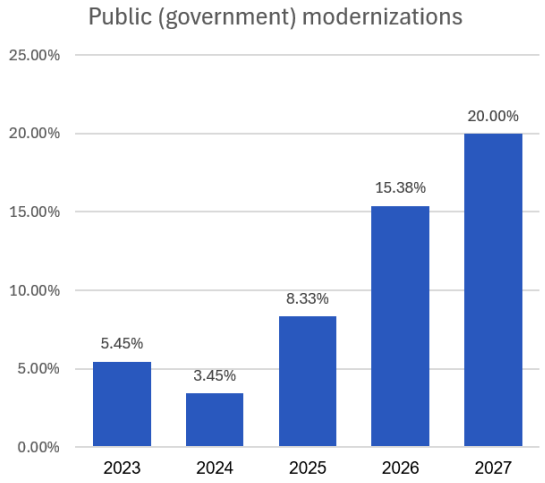












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value added services

Engagement & Knowledge Management Projects 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
Contact Centers Projects	65	15%	75	-7%	70	10%	77	10%	85	6%	90	11%	100	25%	125	16%	145
Employee Collaboration, Task Management & Engagement Tools Implementations	30	17%	35	6%	37	5%	39	-5%	37	3%	38	5%	40	8%	43	5%	45
Knowledge Management (ECM, Portals, Search, Knowledgebases) Implementations	75	7%	80	-6%	75	-7%	70	-7%	65	-15%	55	5%	58	3%	60	8%	65
TOTALS	170	11.76%	190	-4.21%	182	2.20%	186	0.54%	187	-2.14%	183	8.20%	198	15.15%	228	11.84%	255

Values in Million USD

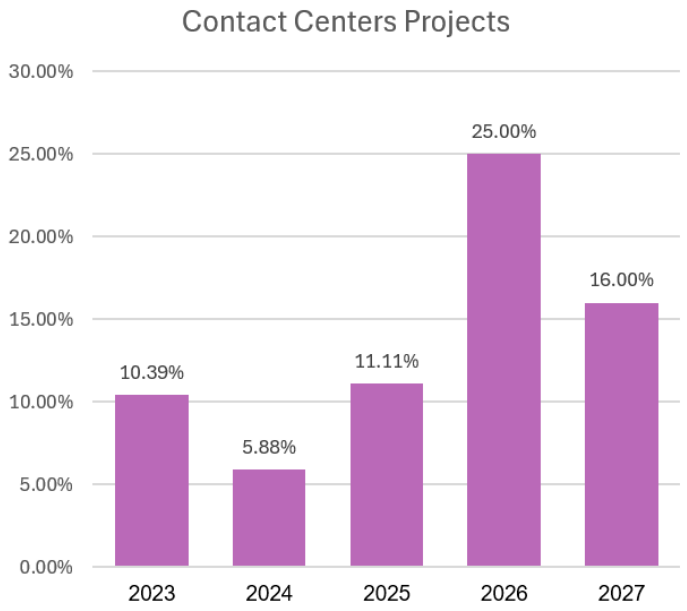


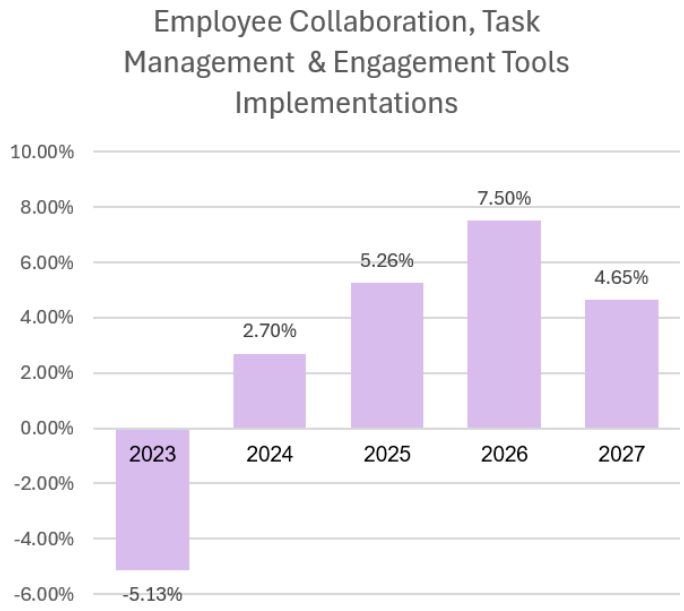
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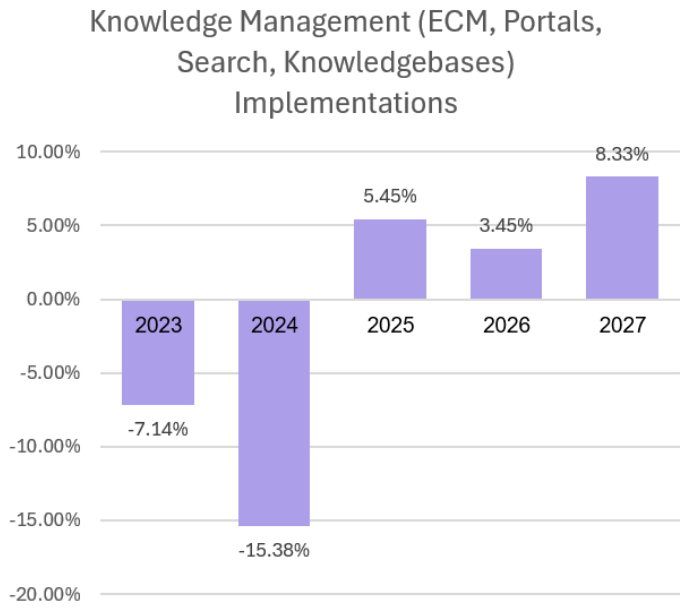
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value added services

Engagement & Knowledge Management Projects Market 2022-2026





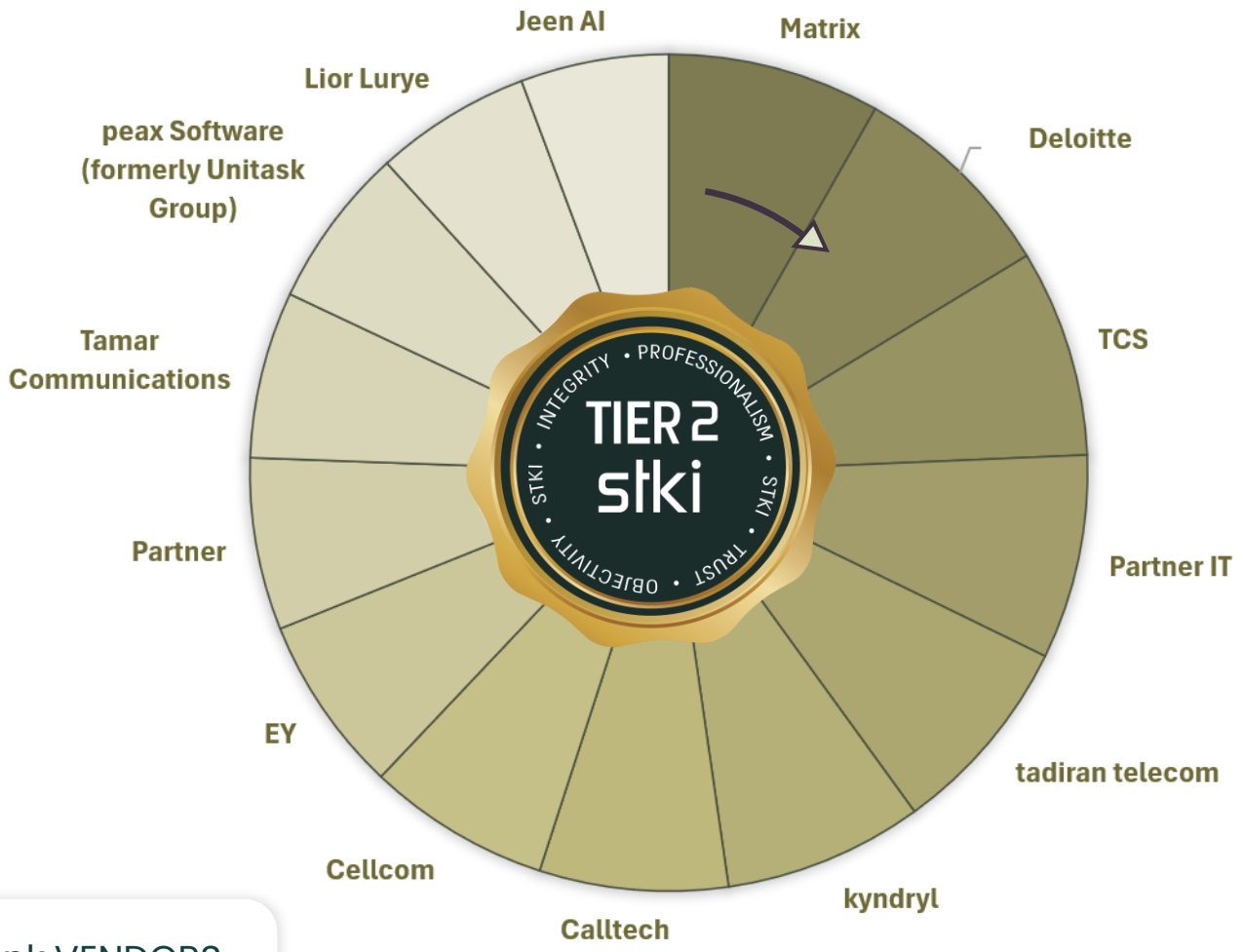


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Contact Centers Projects

value added services





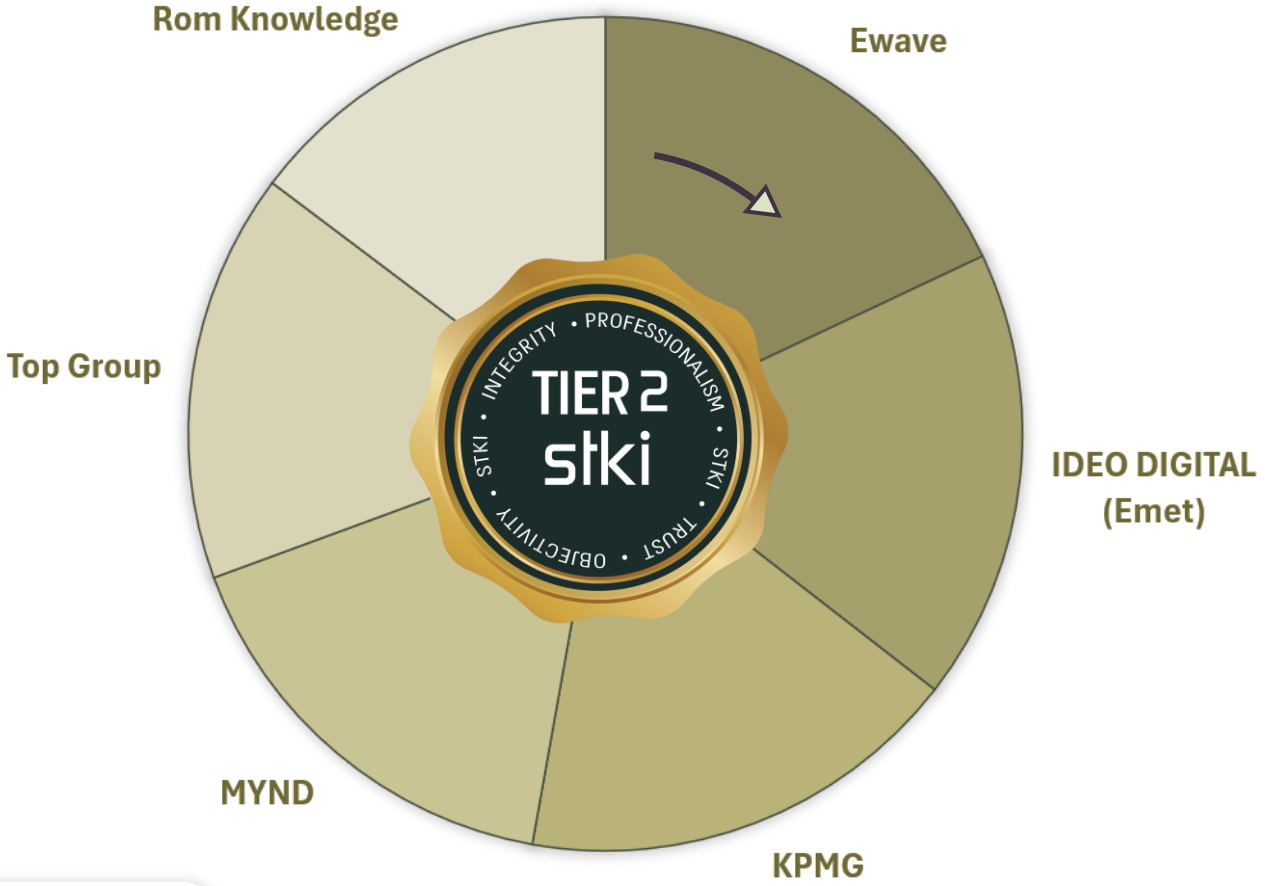
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Employee Collaboration, Task Management & Engagement Tools Implementations





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value added services

Knowledge Management Projects





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value added services

Special projects - 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
3.5	-100%		#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	7	157%	18	39%	25
15	33%	20	20%	24	17%	28	14%	32	9%	35	9%	38	11%	42	19%	50
18.5	8.11%	20	20.00%	24	16.67%	28	14.29%	32	9.38%	35	28.57%	45	33.33%	60	25.00%	75

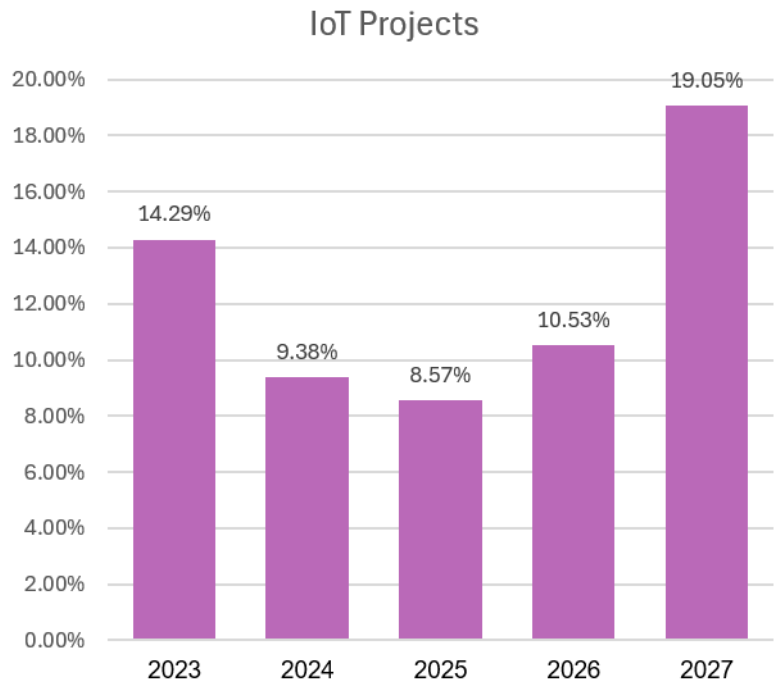
Values in Million USD



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value added services

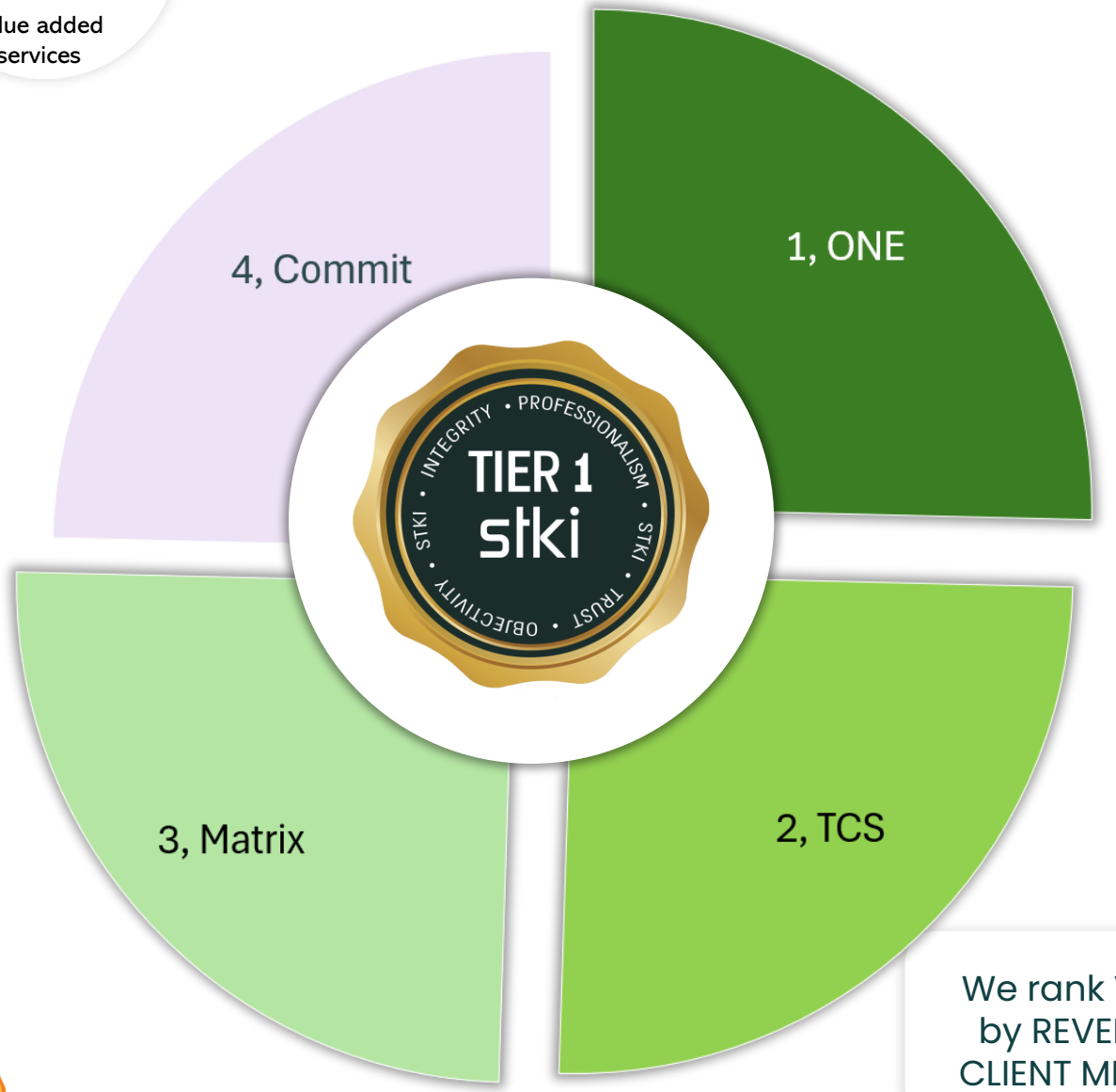
Special projects - Market 2020-2028

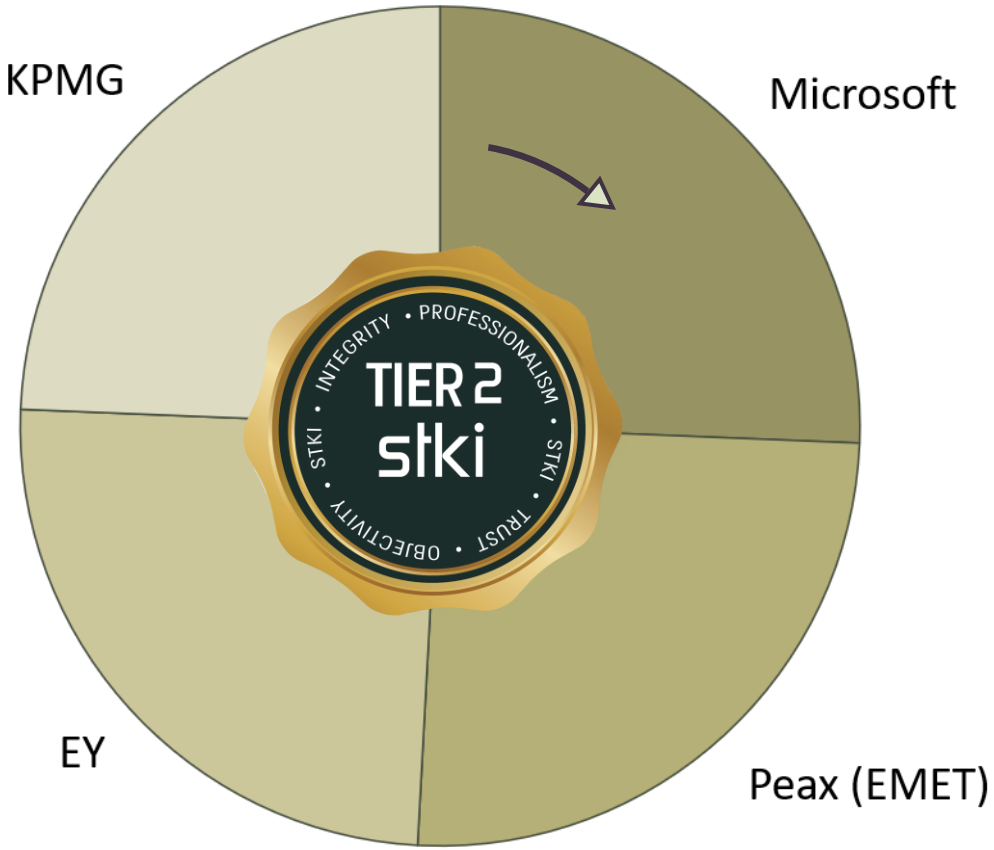


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value added services

Blockchain Projects





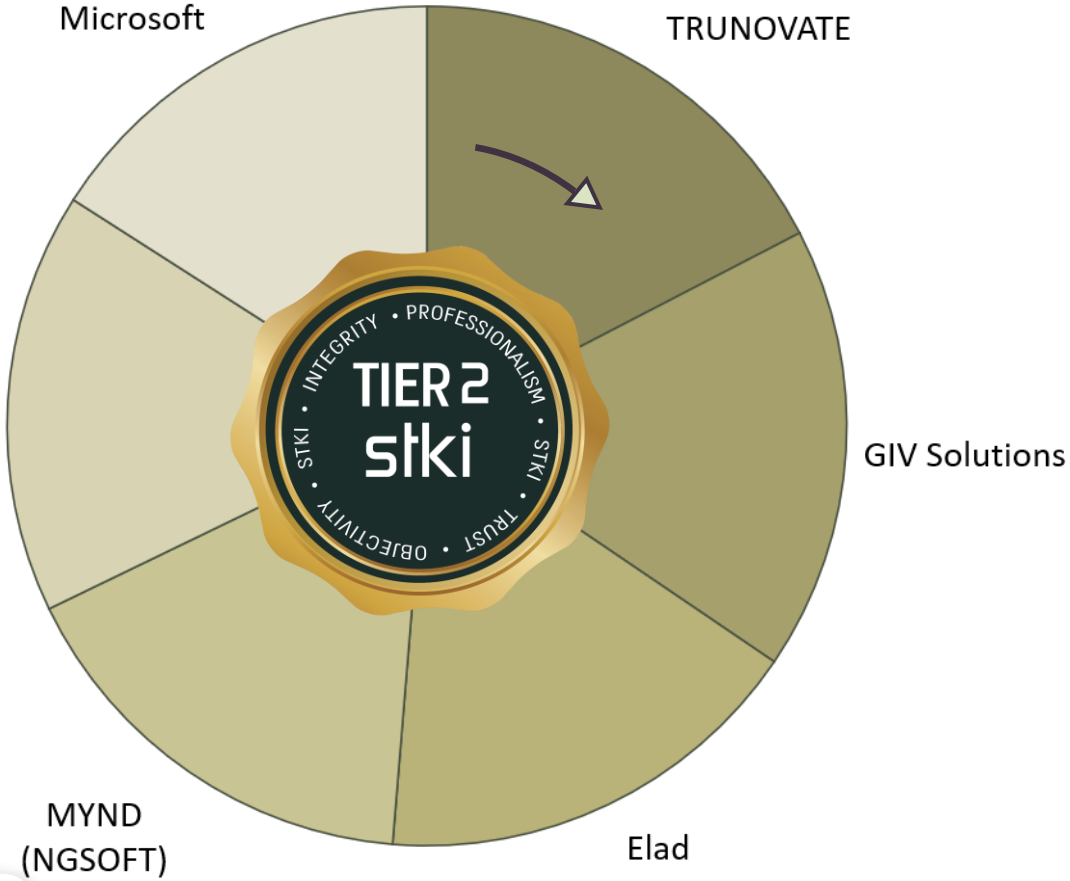
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IoT Projects





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value added services

Automation & AI Projects Market 2020-2028

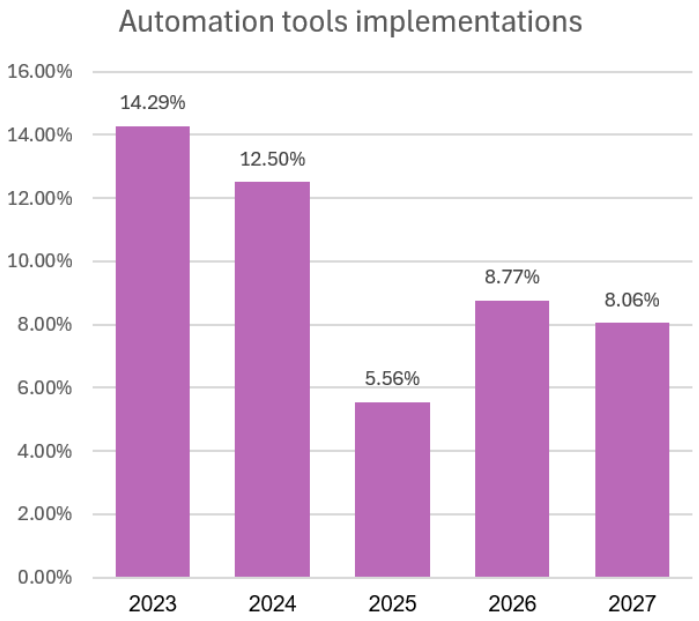
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
Automation tools implementations	25	28%	32	16%	37	14%	42	14%	48	13%	54	6%	57	9%	62	8%	67
Agentic AI Projects											2	400%	10	120%	22	64%	36
Generative AI Projects							16	25%	20	15%	23	39%	32	41%	45	78%	80
TOTALS	25	28.00%	32	15.63%	37	56.76%	58	17.24%	68	16.18%	79	25.32%	99	30.30%	129	41.86%	183

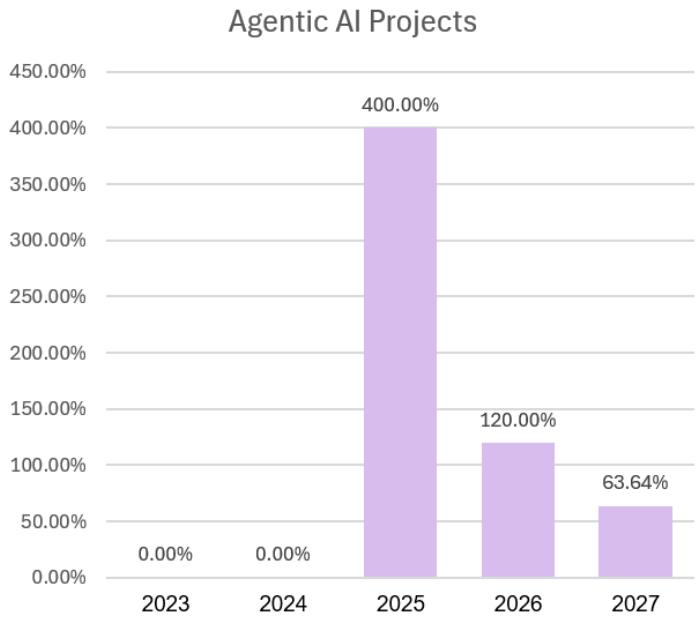
Values in Million USD

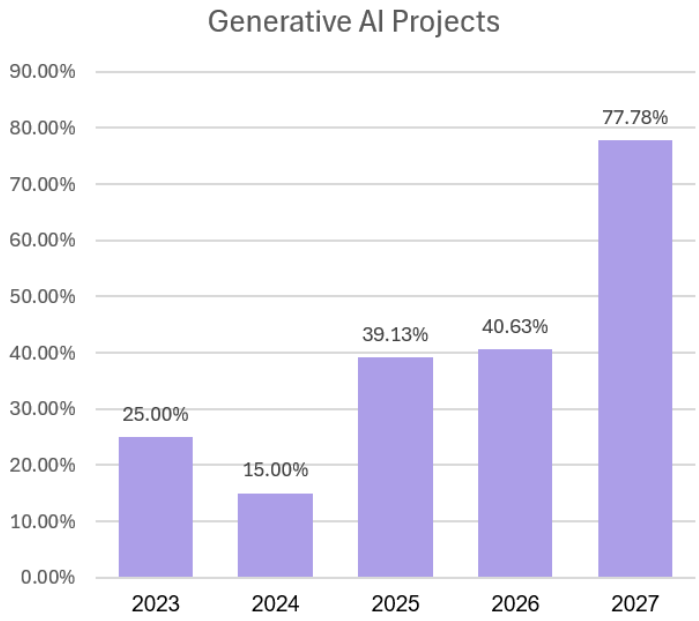
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value added services

Automation & AI Projects Market 2022-202



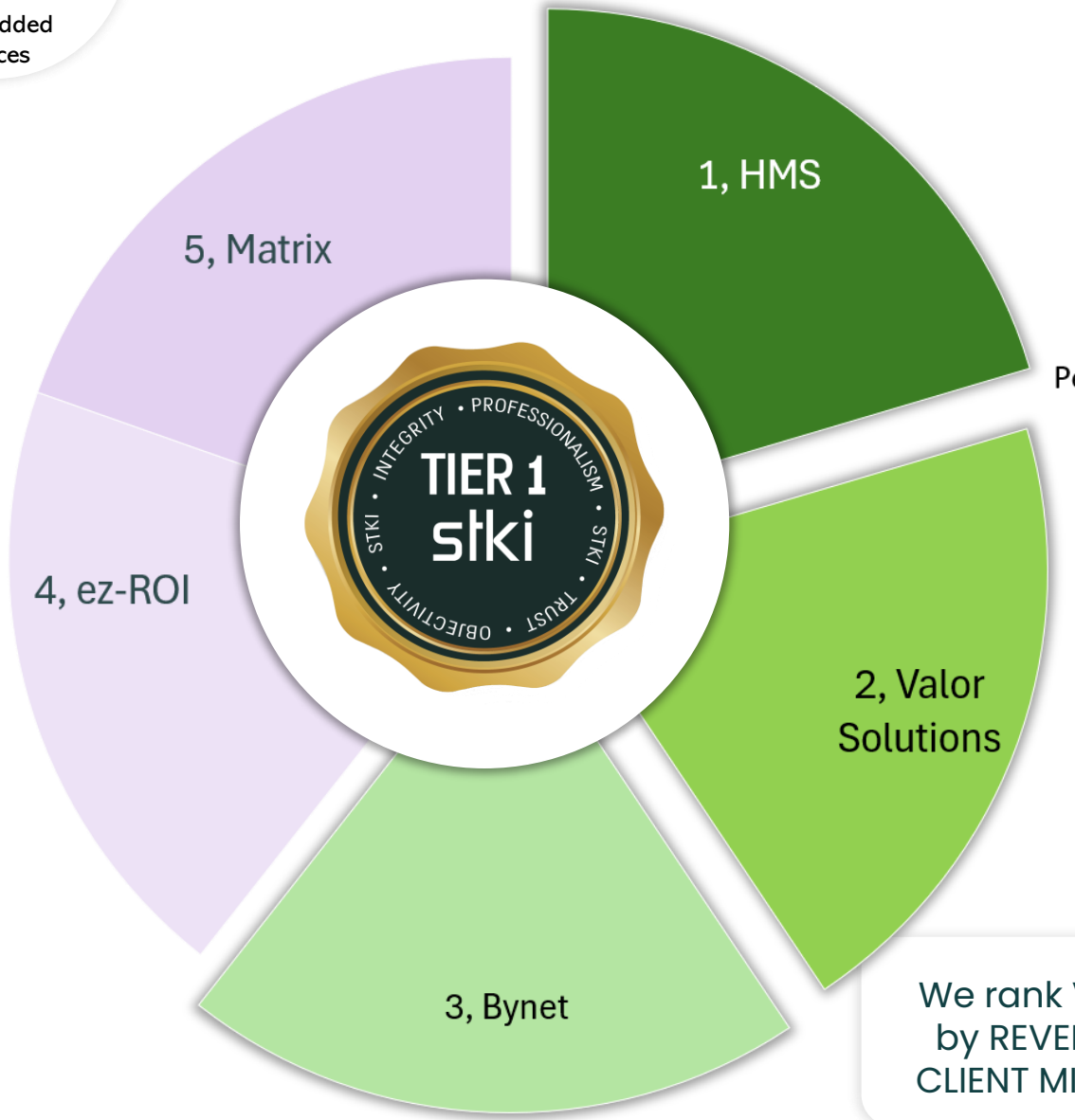


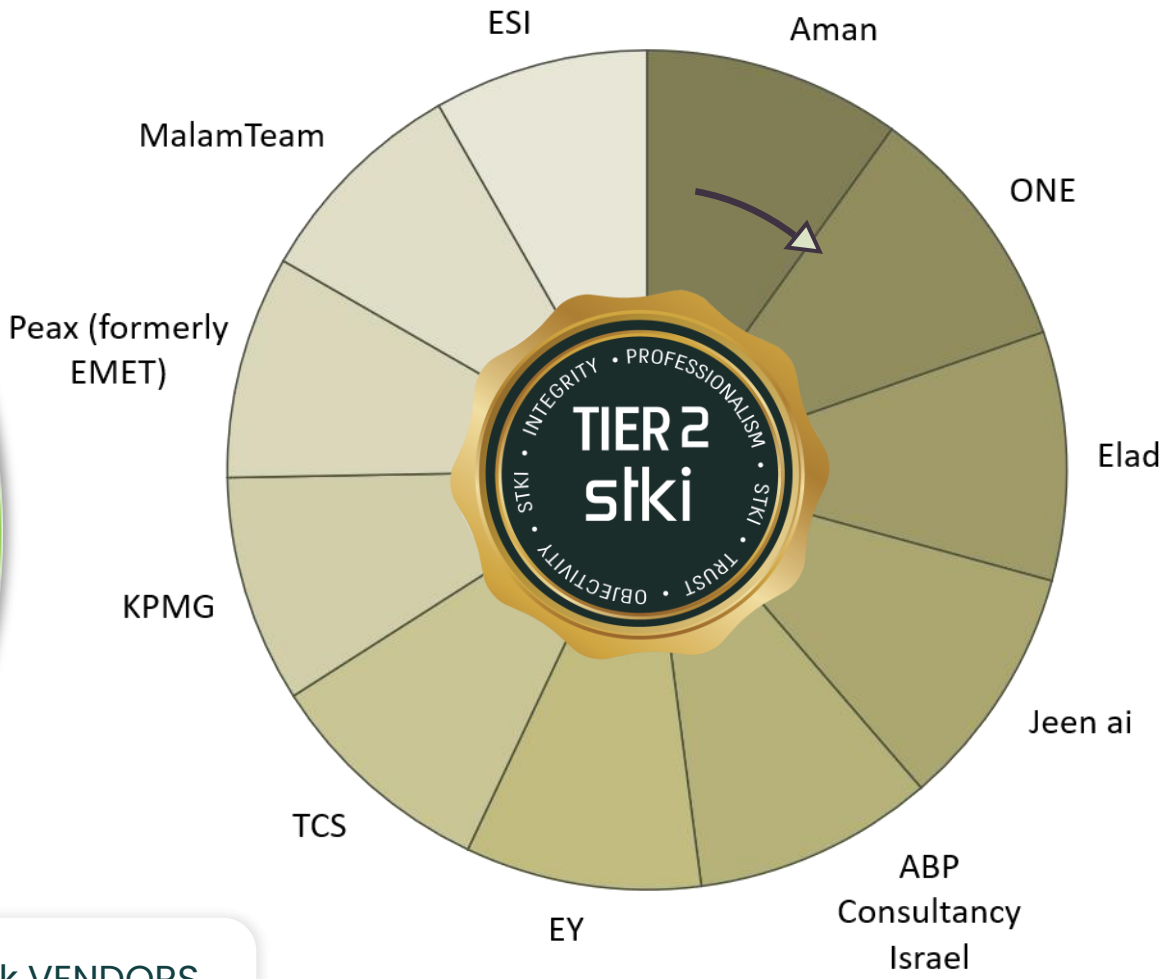


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Automation tools implementations



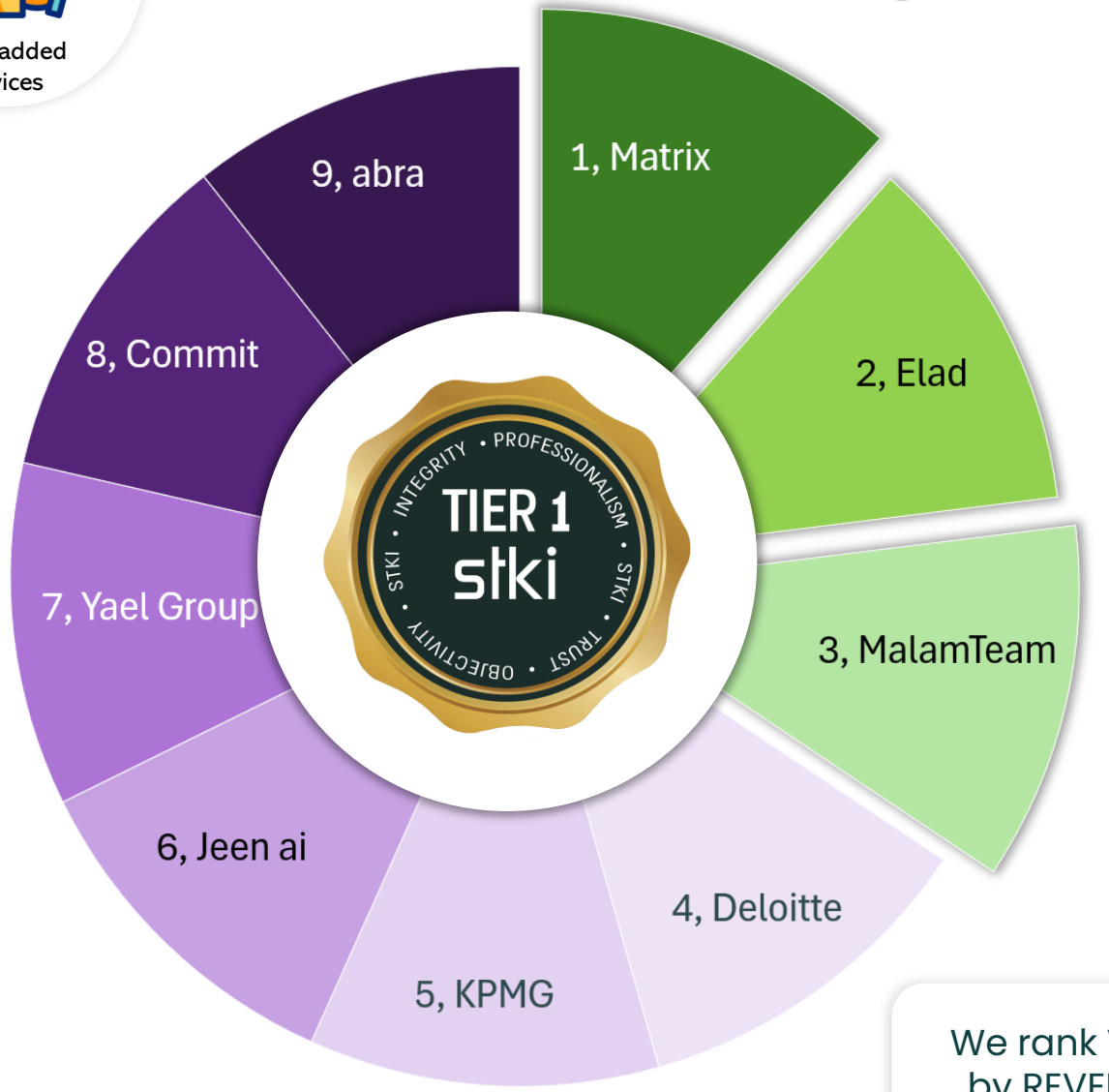


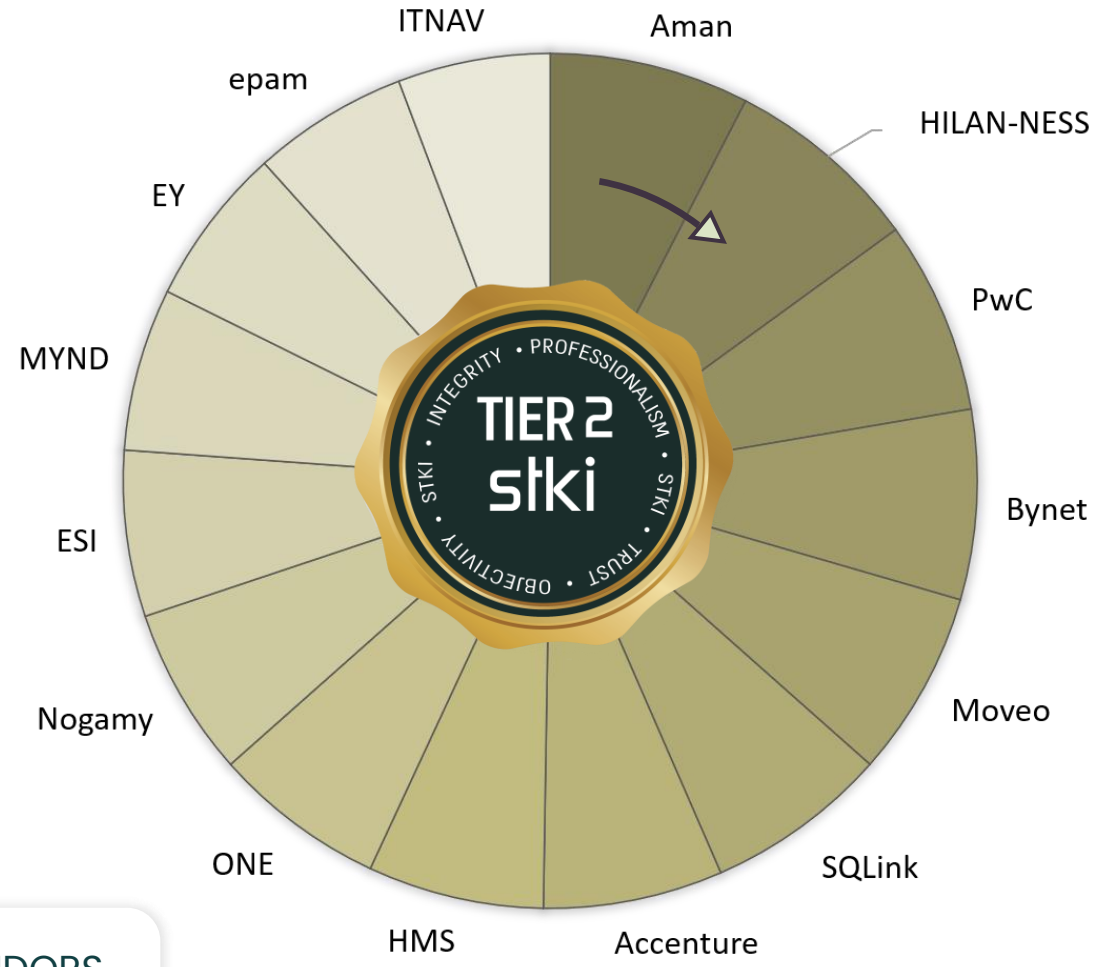
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Agentic AI Projects





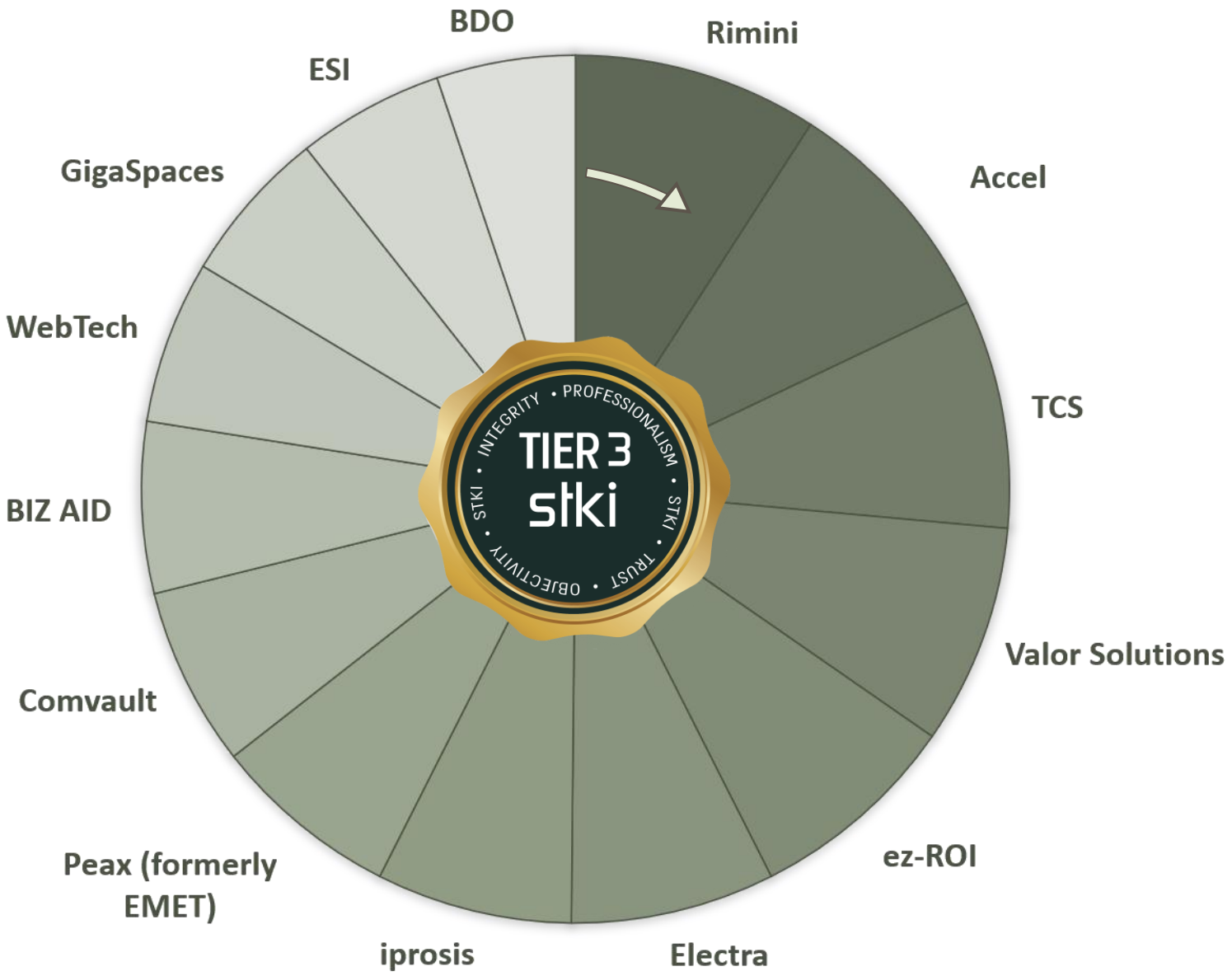
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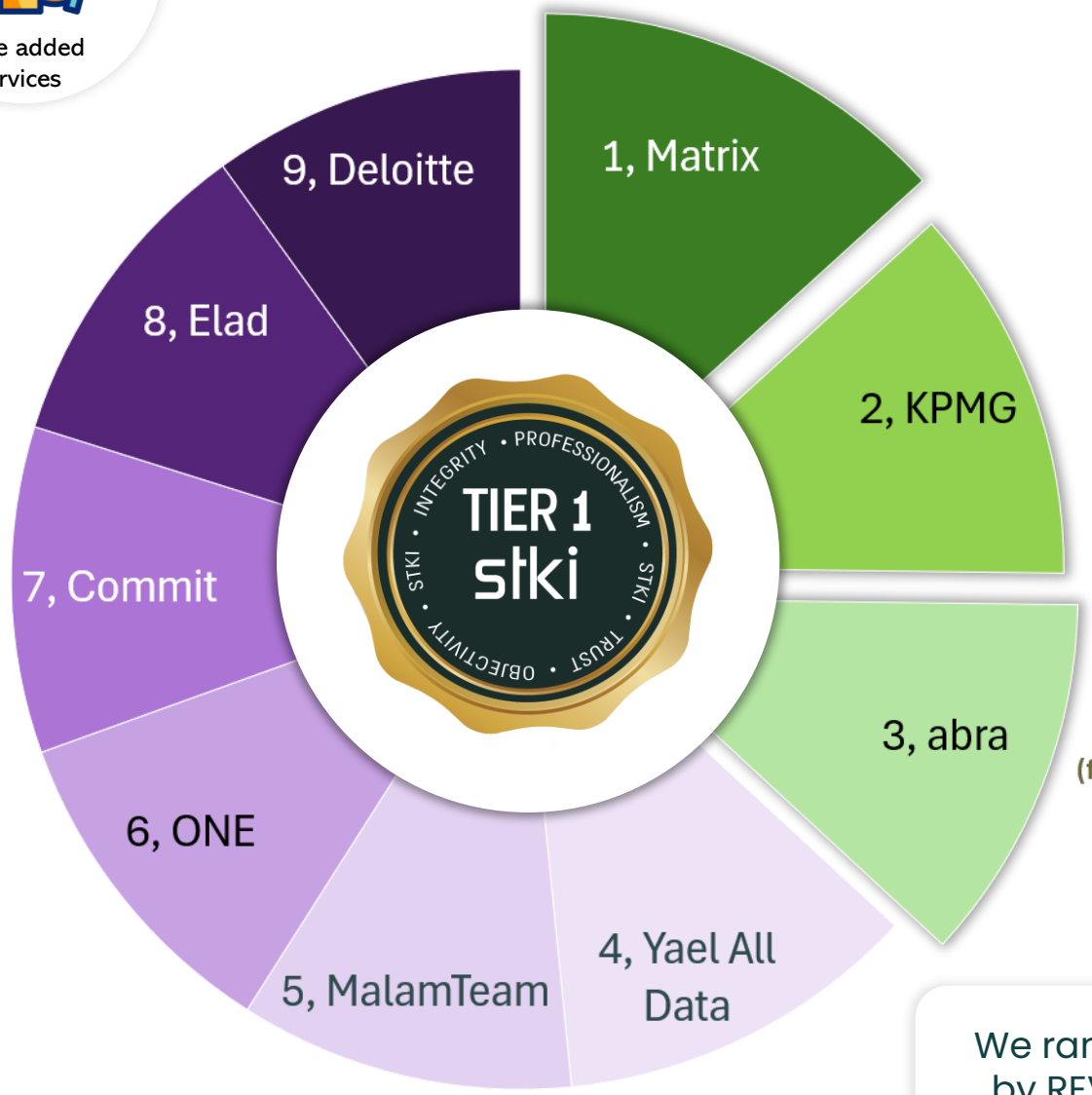
Agentic AI Projects

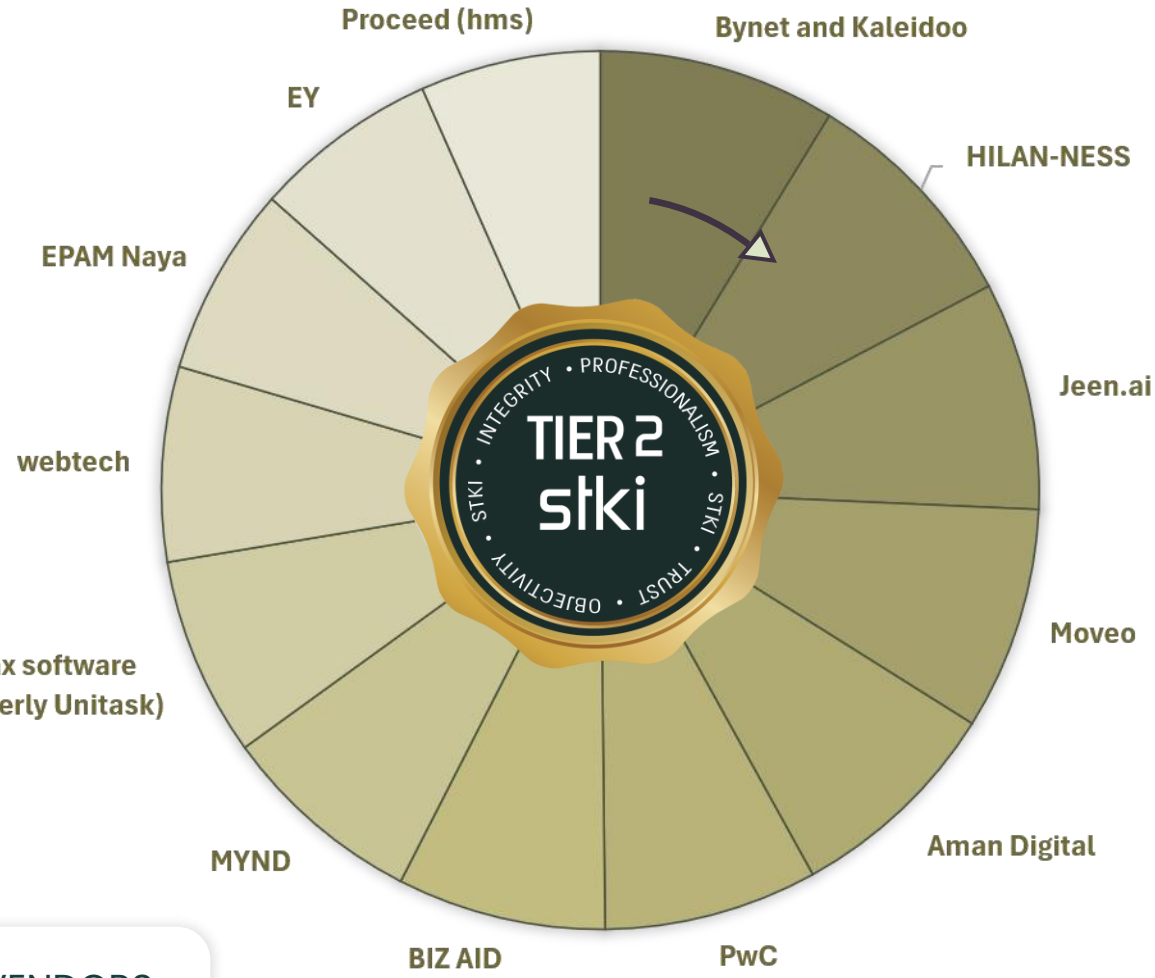


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Generative AI Projects





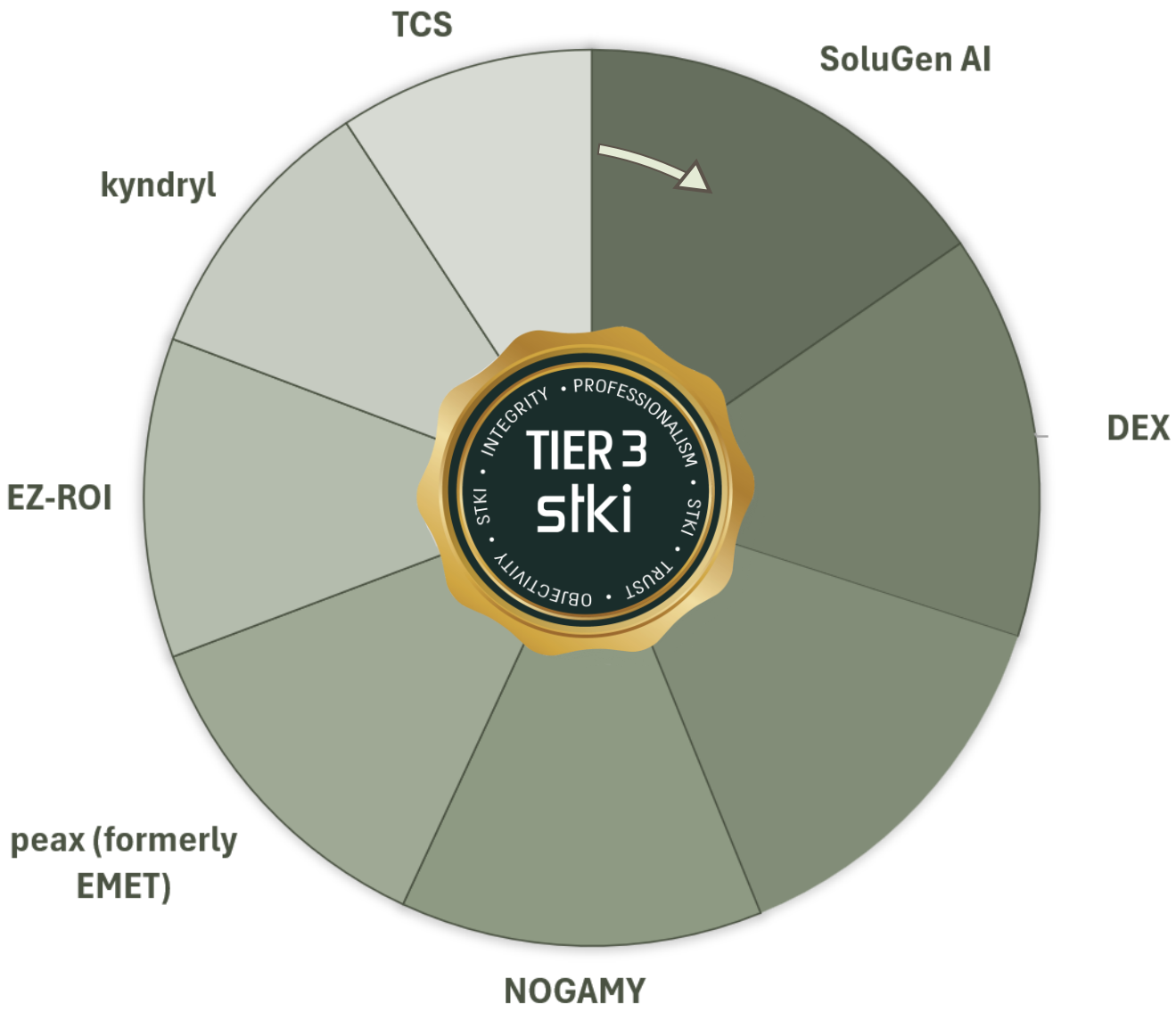
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Generative AI Projects



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value added services

Testing, Training, Fruition & Hatmaa Projects 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
Professional Education, Coaching & Mentoring	56	-11%	50	-4%	48	-17%	40	40%	56	34%	75	33%	100	20%	120	25%	150
SW Testing & QA	110	5%	115	3%	118	2%	120	2%	122	2%	125	3%	129	5%	135	2%	138
Fruition & Implementation (הטמעה)	75	7%	80	5%	84	-7%	78	5%	82	2%	84	7%	90	2%	92	4%	96
TOTALS	241	1.66%	245	2.04%	250	-4.80%	238	9.24%	260	9.23%	284	12.32%	319	8.78%	347	10.66%	384

Values in Million USD

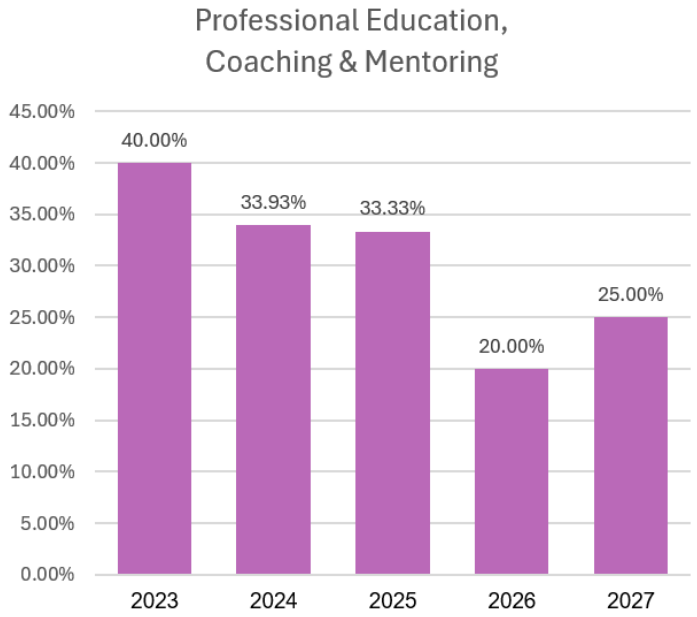


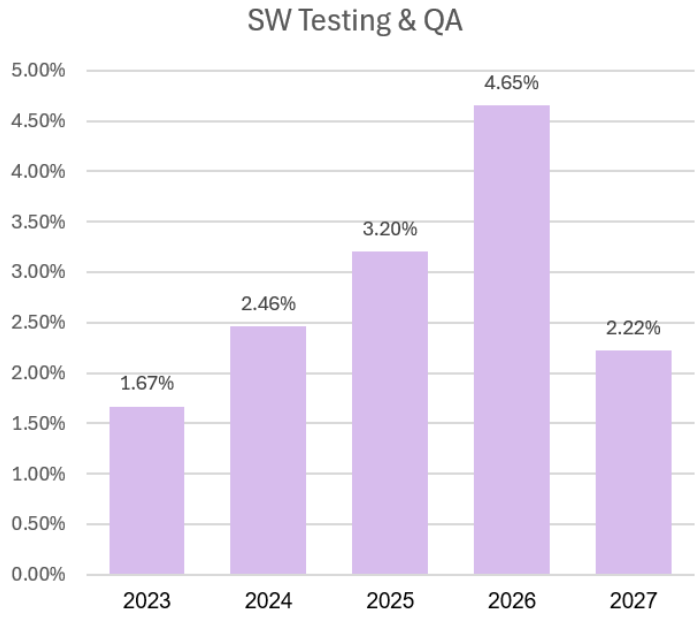
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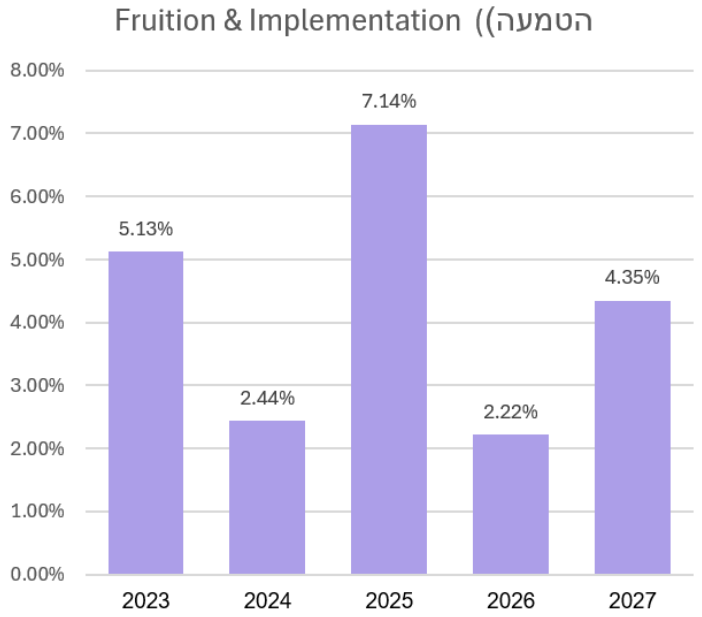
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Testing, Training, Fruition & Hatmaa Projects Market 2022-2026





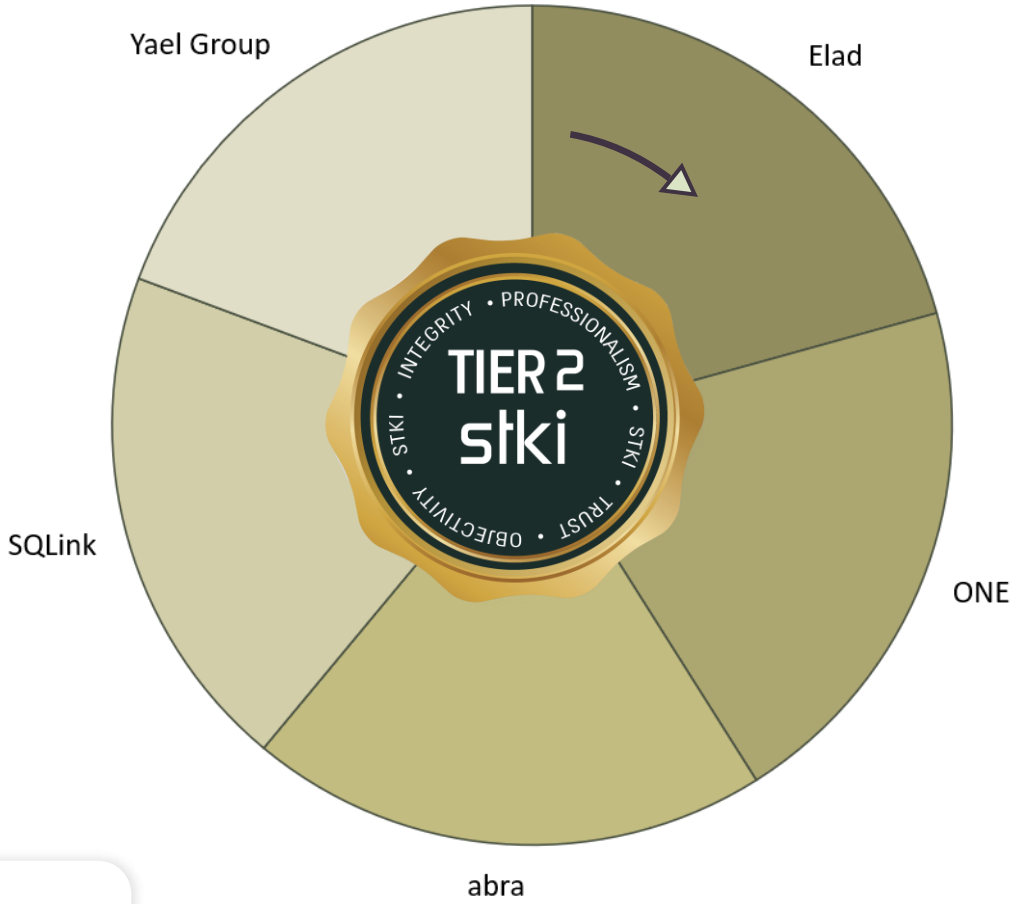


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value added services

Professional Education, Coaching & Mentoring





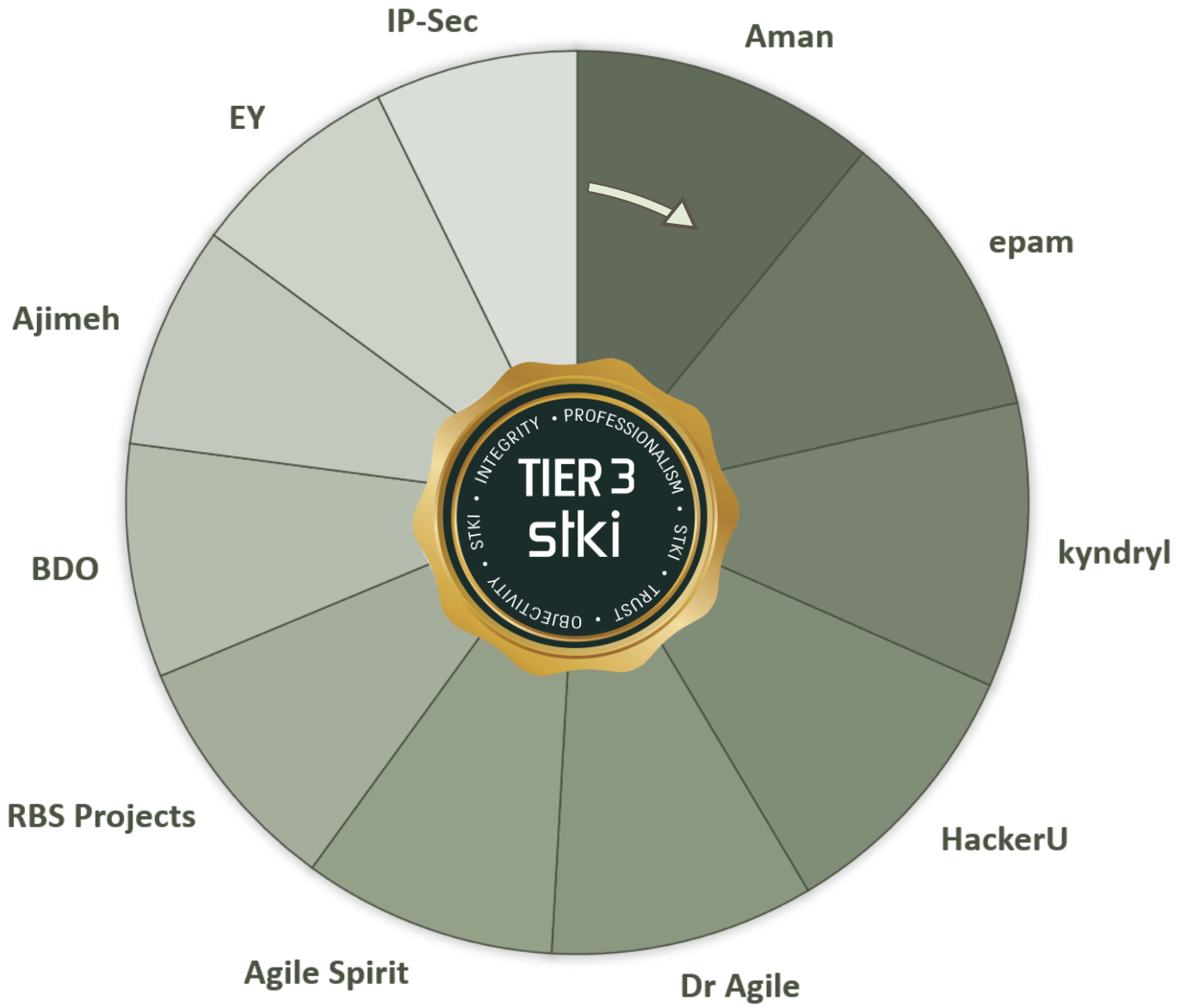
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Professional Education, Coaching & Mentoring

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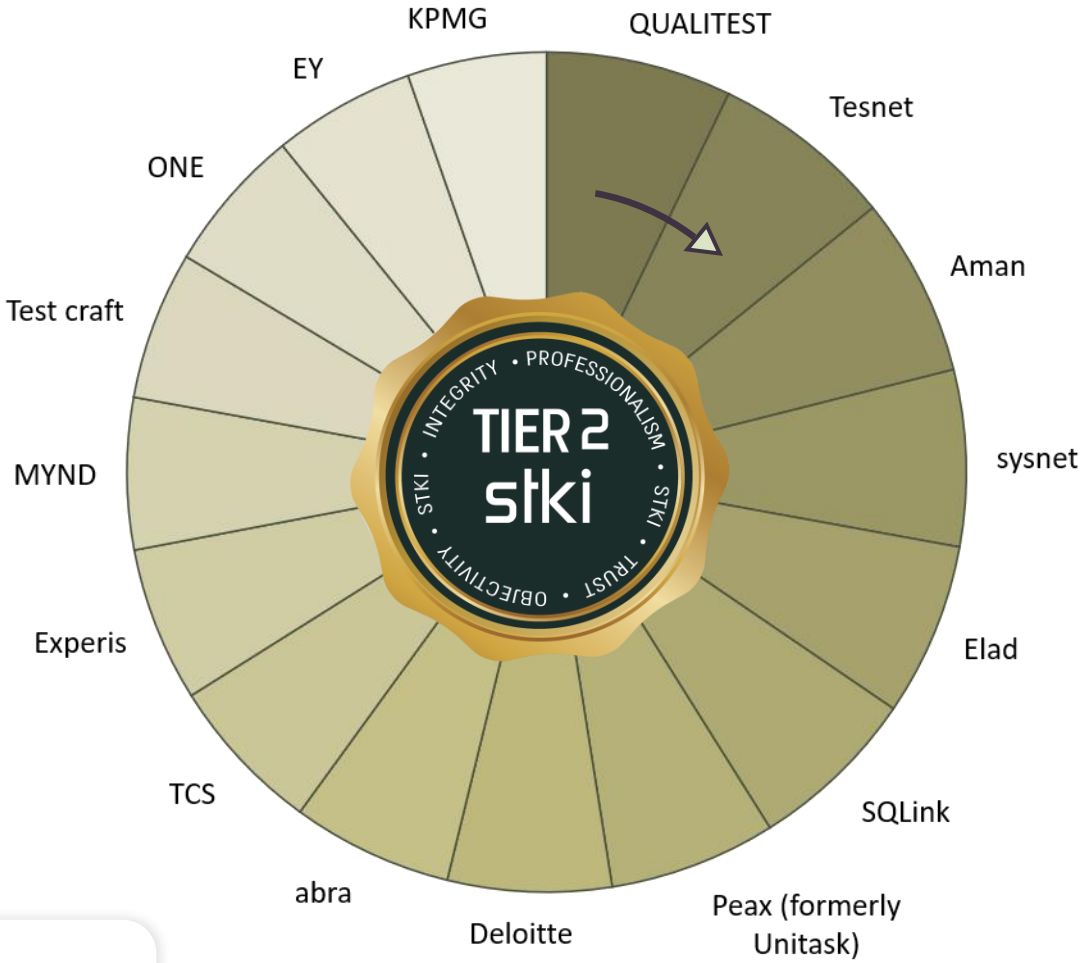


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SW Testing & QA





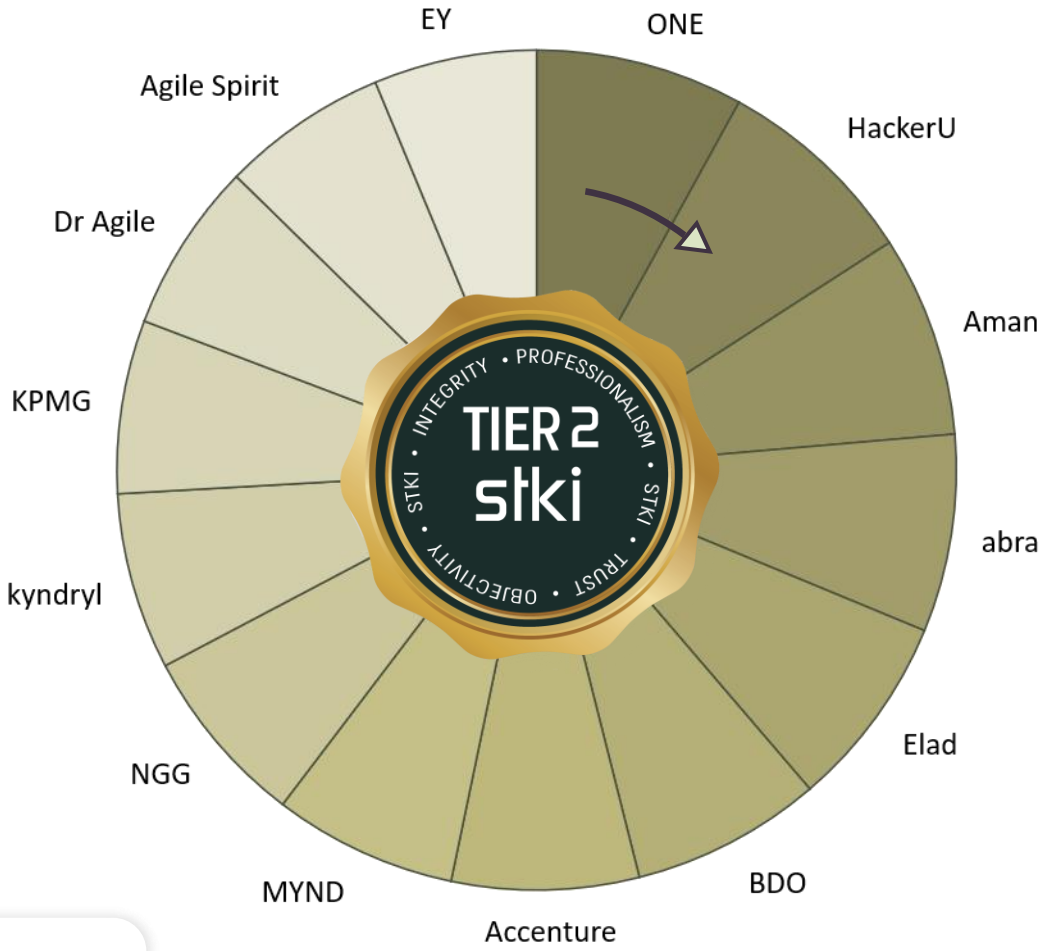
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Fruition & Implementation (הטמעה)





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EGRC & Regulation Projects & Implementations 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
Regulation Projects	34	-12%	30	30%	39	-13%	34	-12%	30	-3%	29	17%	34	12%	38	11%	42
Governance, Risk and Compliance Management	58	-3%	56	-4%	54	-7%	50	4%	52	-8%	48	6%	51	6%	54	4%	56
TOTALS	92	-6.52%	86	8.14%	93	-9.68%	84	-2.38%	82	-6.10%	77	10.39%	85	8.24%	92	6.52%	98

Values in Million USD

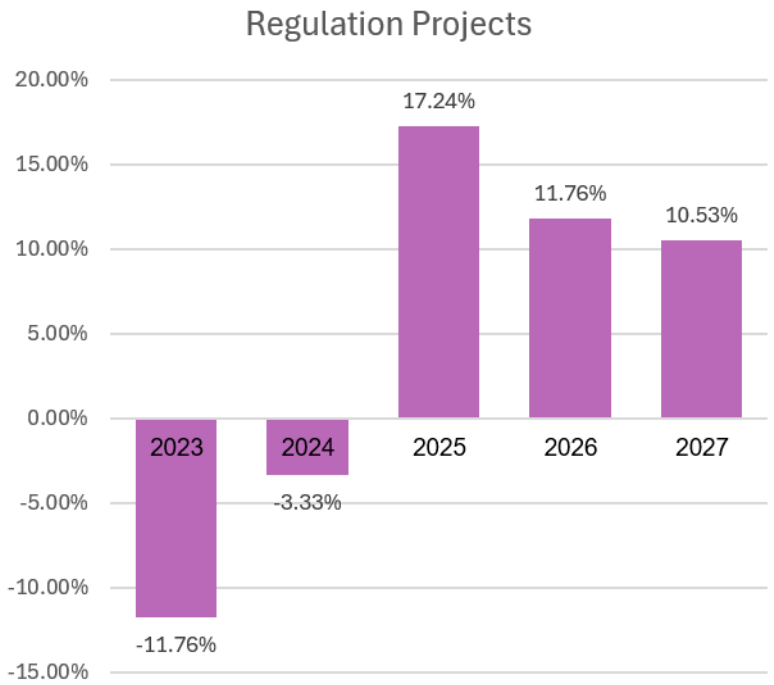


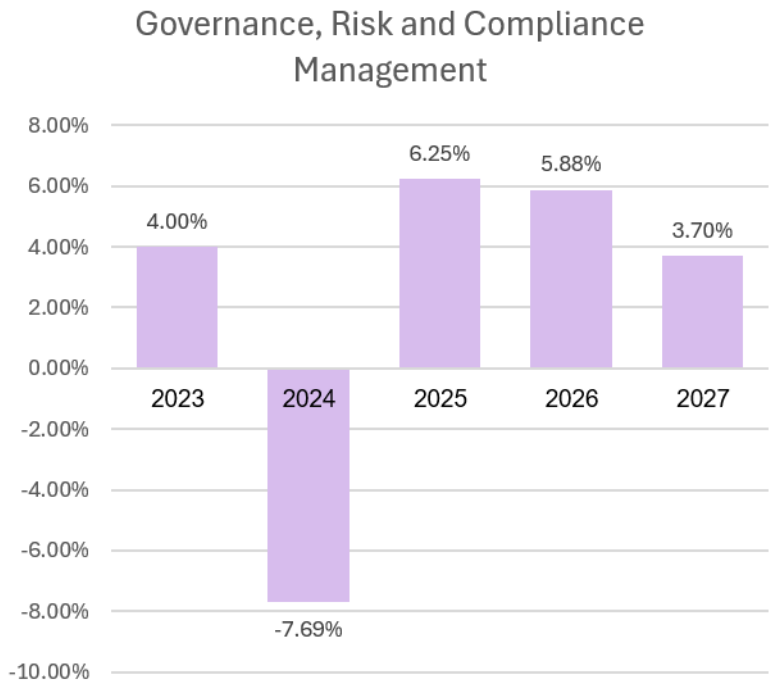
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EGRC & Regulation Projects & Implementations Market 2022-2026

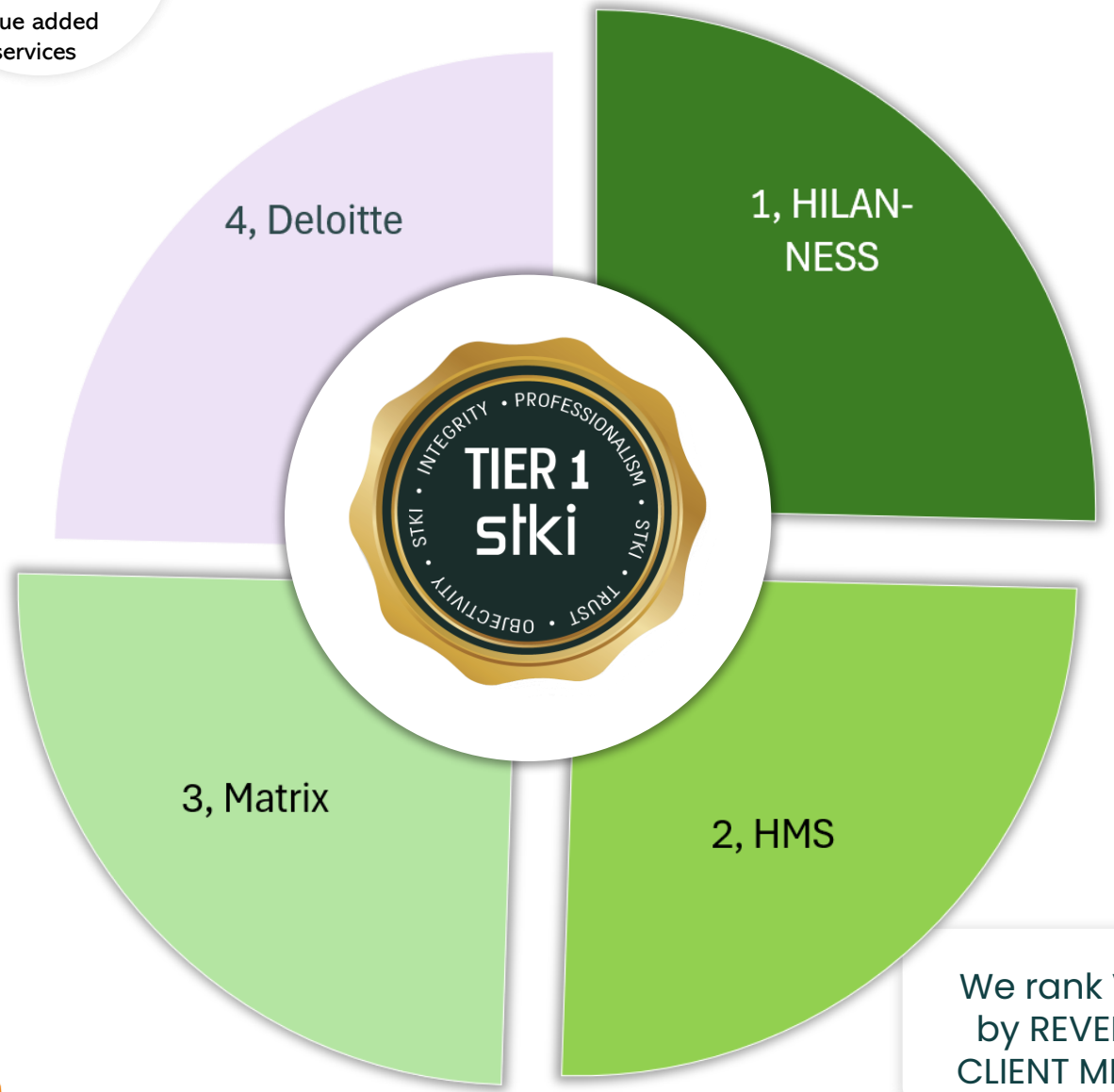


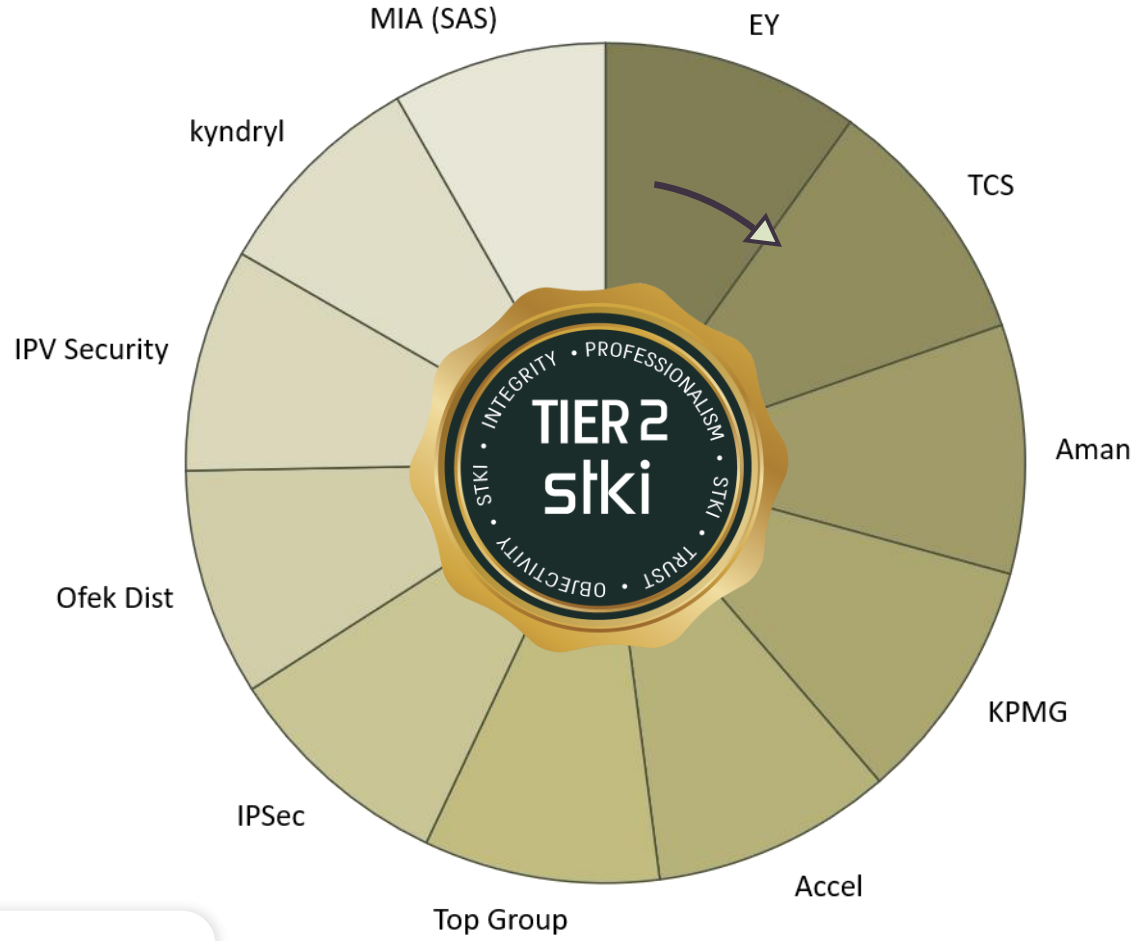


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Regulation Projects





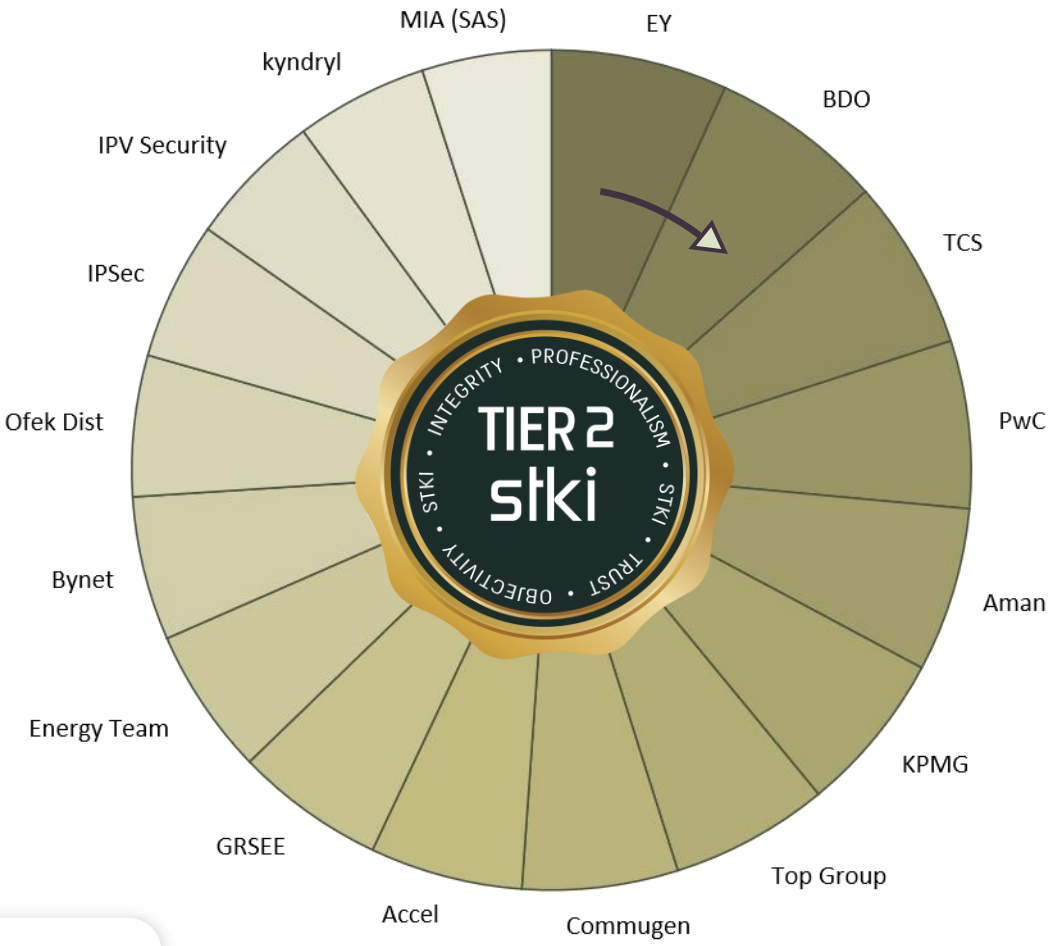
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Governance, Risk and Compliance Management





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Outsourcing & Managed Services 2020-2028

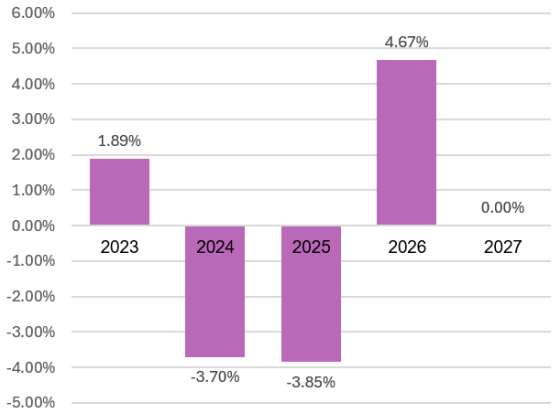
	2020		2021		2022		2023		2024		2025		2026		2027		2028
	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	% change	Market Size	forecasted (%) growth for 2026	Market Size	forecasted (%) growth for 2027	Market Size	forecasted (%) growth for 2028	Market Size
Complete and/or application outsourcing (Client owns the HW)	145	5%	152	2%	155	3%	159	2%	162	-4%	156	-4%	150	5%	157	0%	157
Infrastructure Outsourcing (infrastructure, storage mngt, DBA services)	120	7%	128	2%	130	-2%	128	-2%	125	2%	127	3%	131	1%	132	10%	145
Call Centers/Help Desk Outsourcing Services	90	6%	95	5%	100	5%	105	3%	108	5%	113	3%	116	2%	118	6%	125
FINOPS Services		#DIV/0!		#DIV/0!	4	25%	5	40%	7	29%	9	22%	11	18%	13	0%	13
Managed Security Services (SOC, XDR, other managed services for technial products)	35	11%	39	8%	42	17%	49	4%	51	16%	59	14%	67	19%	80	25%	100
CISO as a SERVICE		#DIV/0!		#DIV/0!	3	50%	4.5	33%	6	17%	7	14%	8	13%	9	44%	13
DRaaS + Backup As A Service	75	23%	92	7%	98	12%	110	9%	120	8%	130	23%	160	10%	176	8%	190
Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)	185	12%	208	6%	220	14%	250	8%	270	2%	275	4%	285	2%	290	3%	300
Near shore	100	18%	118	18%	139	18%	164	7%	175	15%	202	15%	232	3%	240	8%	258
Off shore	55	55%	85	6%	90	6%	95	5%	100	-5%	95	11%	105	10%	115	9%	125
Staff Augmentation (gulgalot)	150	6%	159	6%	169	6%	179	-5%	170	-12%	150	3%	155	10%	170	9%	185
TOTALS	955	12.67%	1076	6.88%	1150	8.57%	1248.5	3.64%	1294	2.24%	1323	7.33%	1420	5.63%	1500	7.40%	1611

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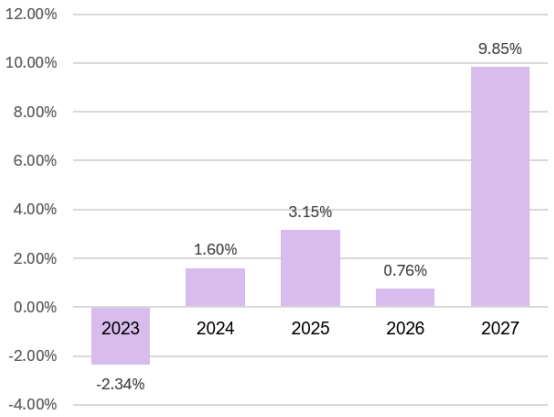
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Outsourcing & Managed Services 2022-2026

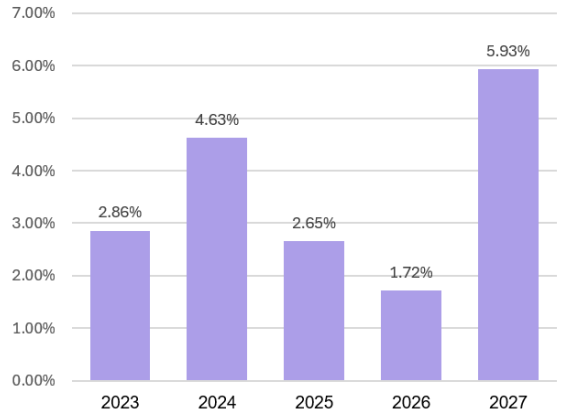
Complete and/or application outsourcing (Client owns the HW)



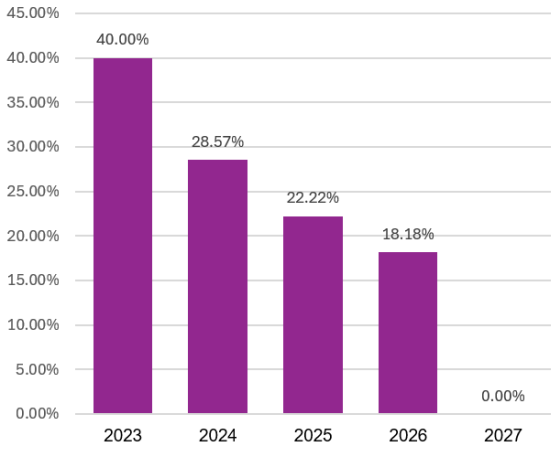
Infrastructure Outsourcing (infrastructure, storage mngt, DBA services)



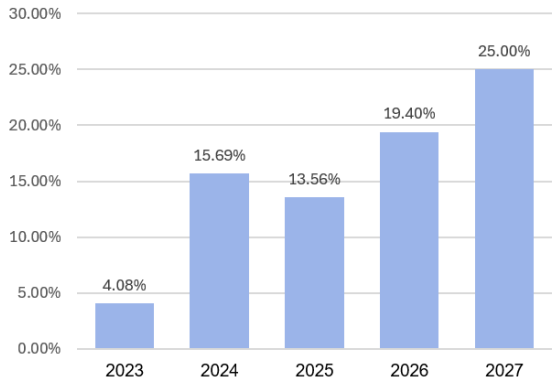
Call Centers/Help Desk Outsourcing Services



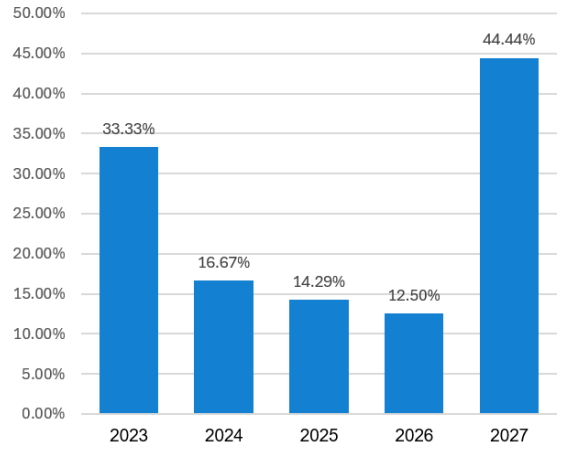
FINOPS Services



Managed Security Services (SOC, XDR, other managed services for technial products)



CISO as a SERVICE

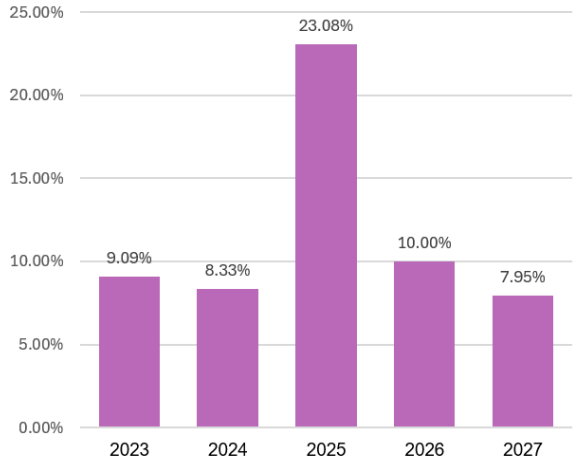


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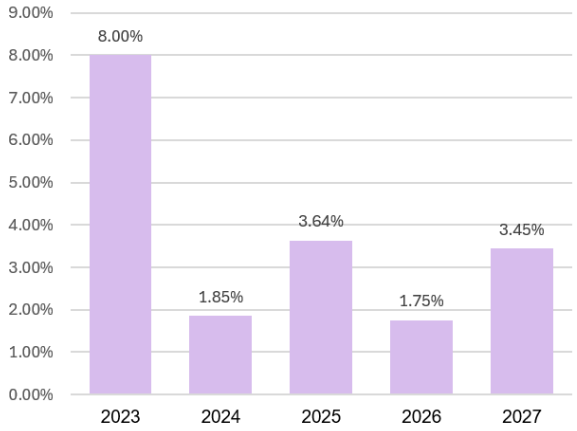
value added services

Outsourcing & Managed Services 2022-2026

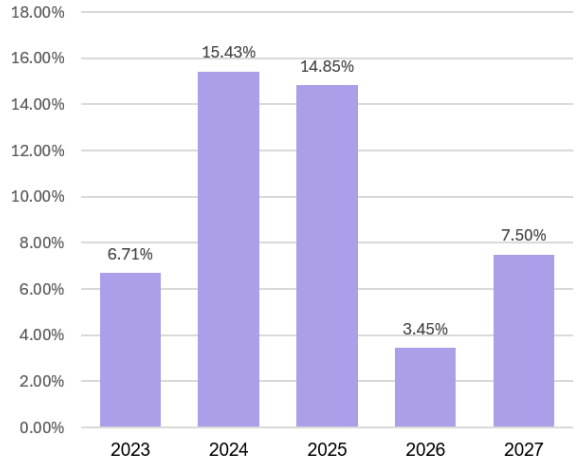
DRaaS + Backup As A Service



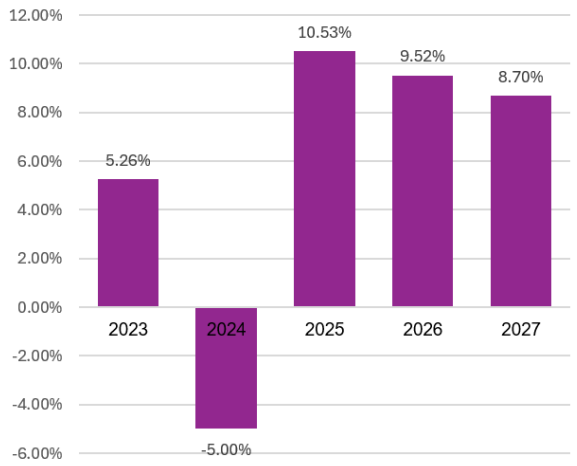
Business Services as a Service- BSaaS (Salaries, Payments, BPO, etc.)



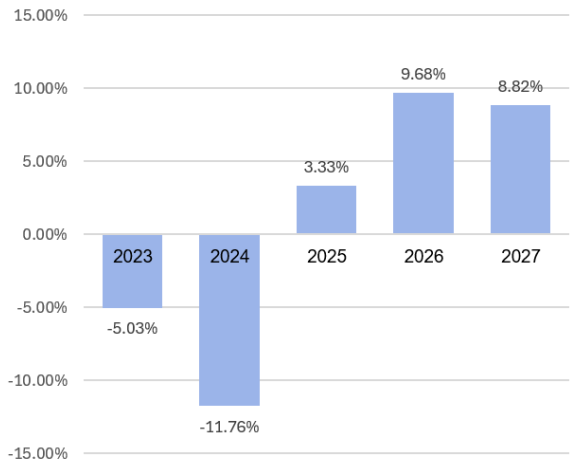
Near shore



Off shore



Staff Augmentation (gulgalot)

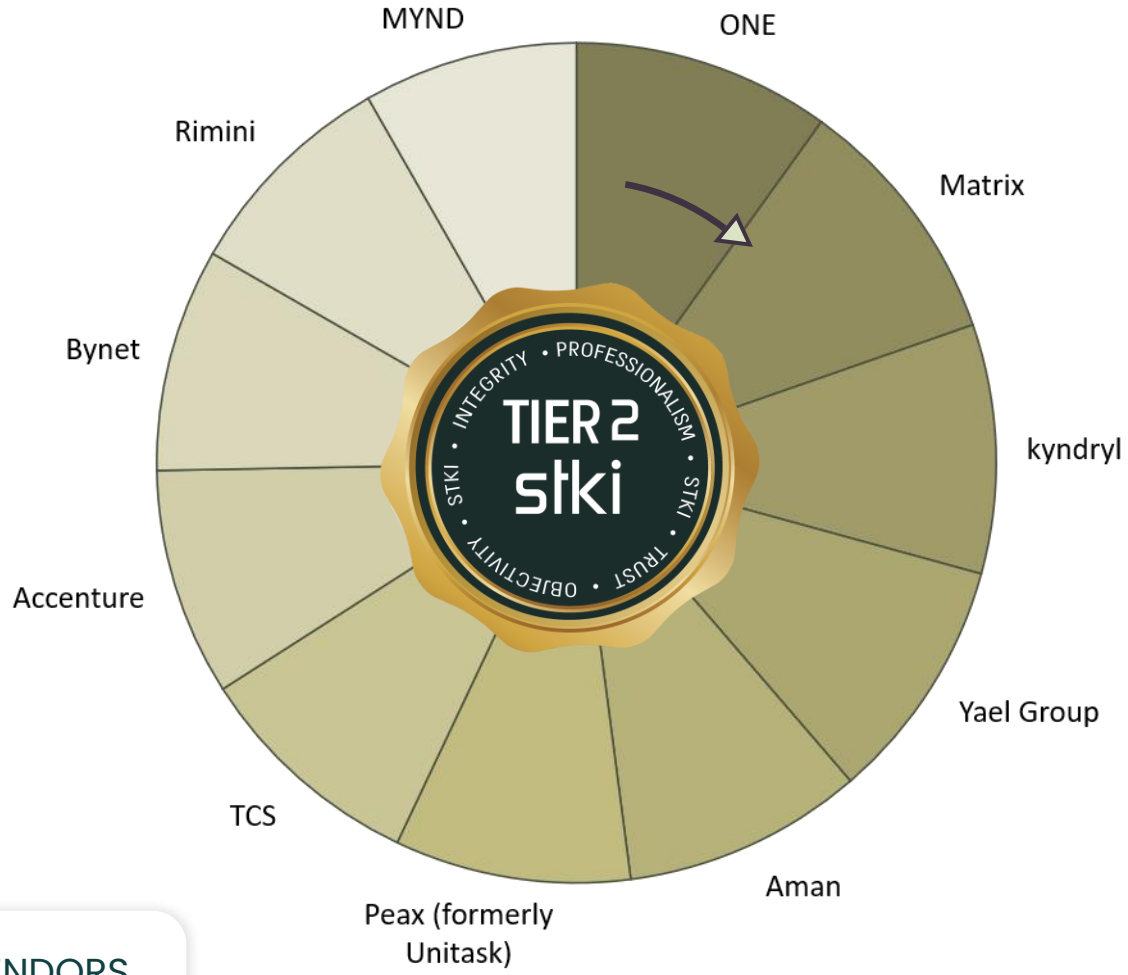


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value added services

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





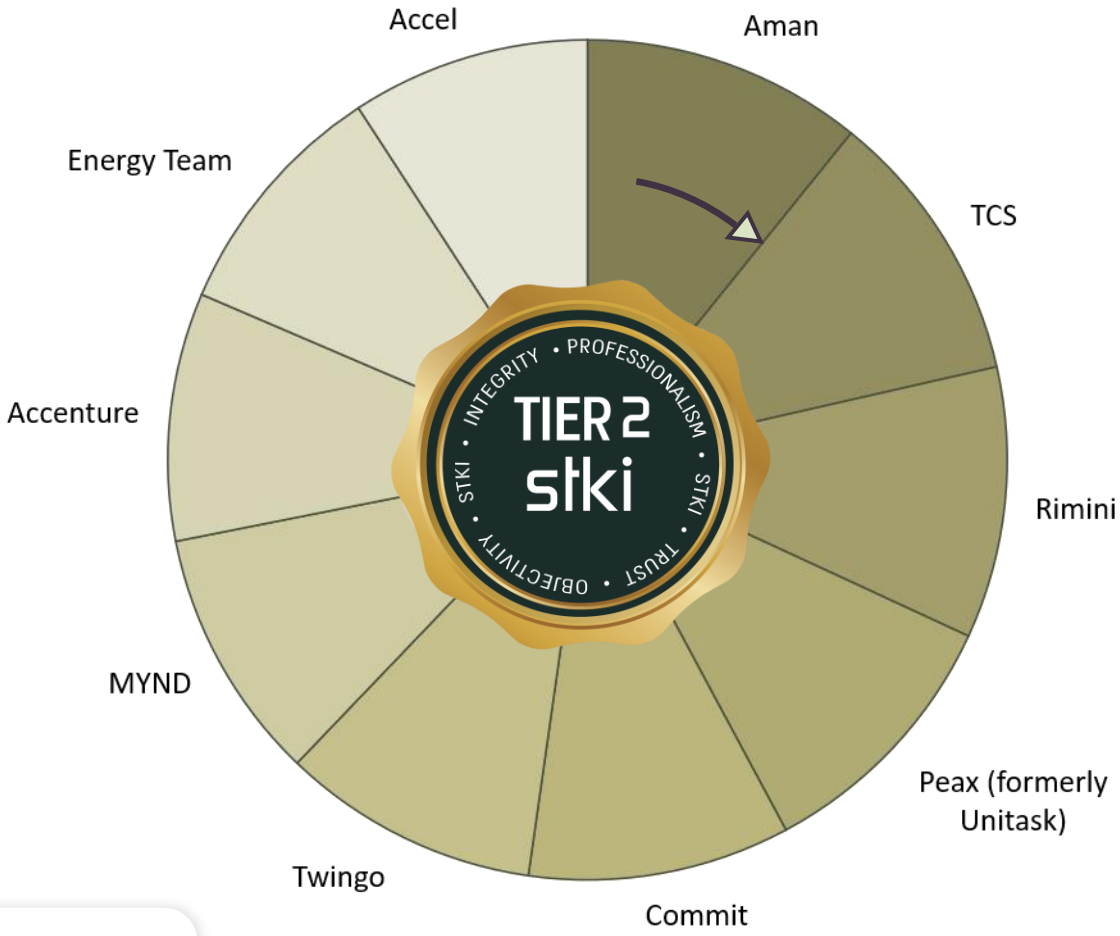
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value added services

Infrastructure Outsourcing (infrastructure, Storage mngt, DBA services)





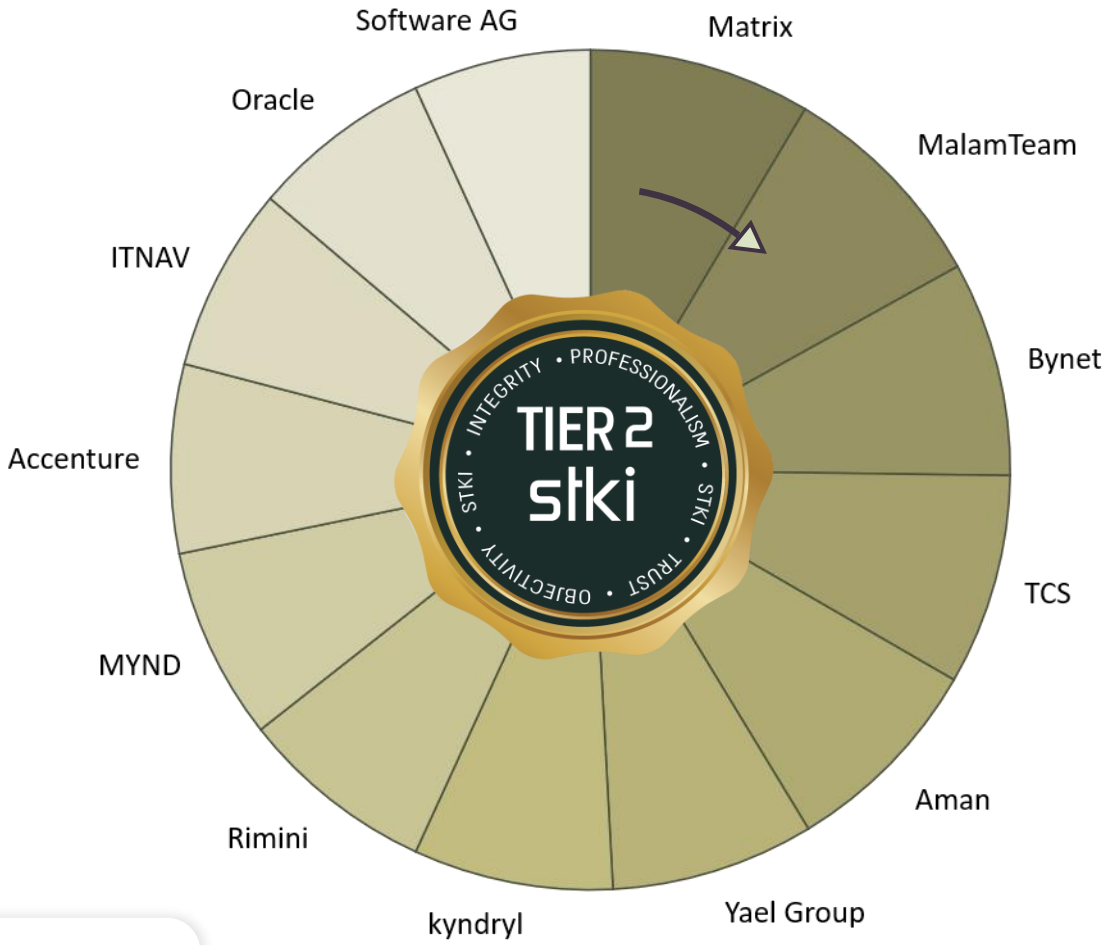
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value added services

Call Centers/Help Desk Outsourcing Services



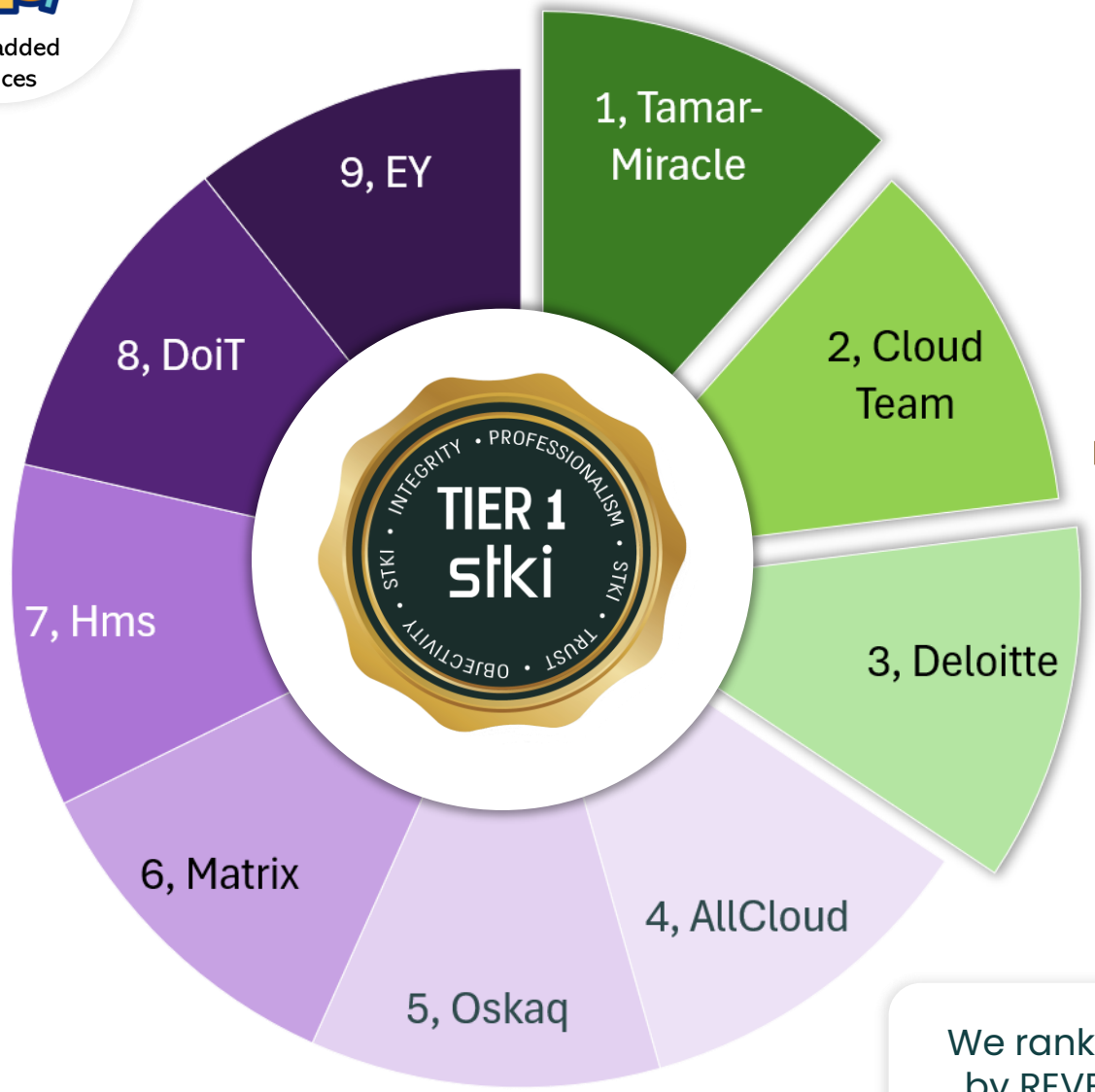


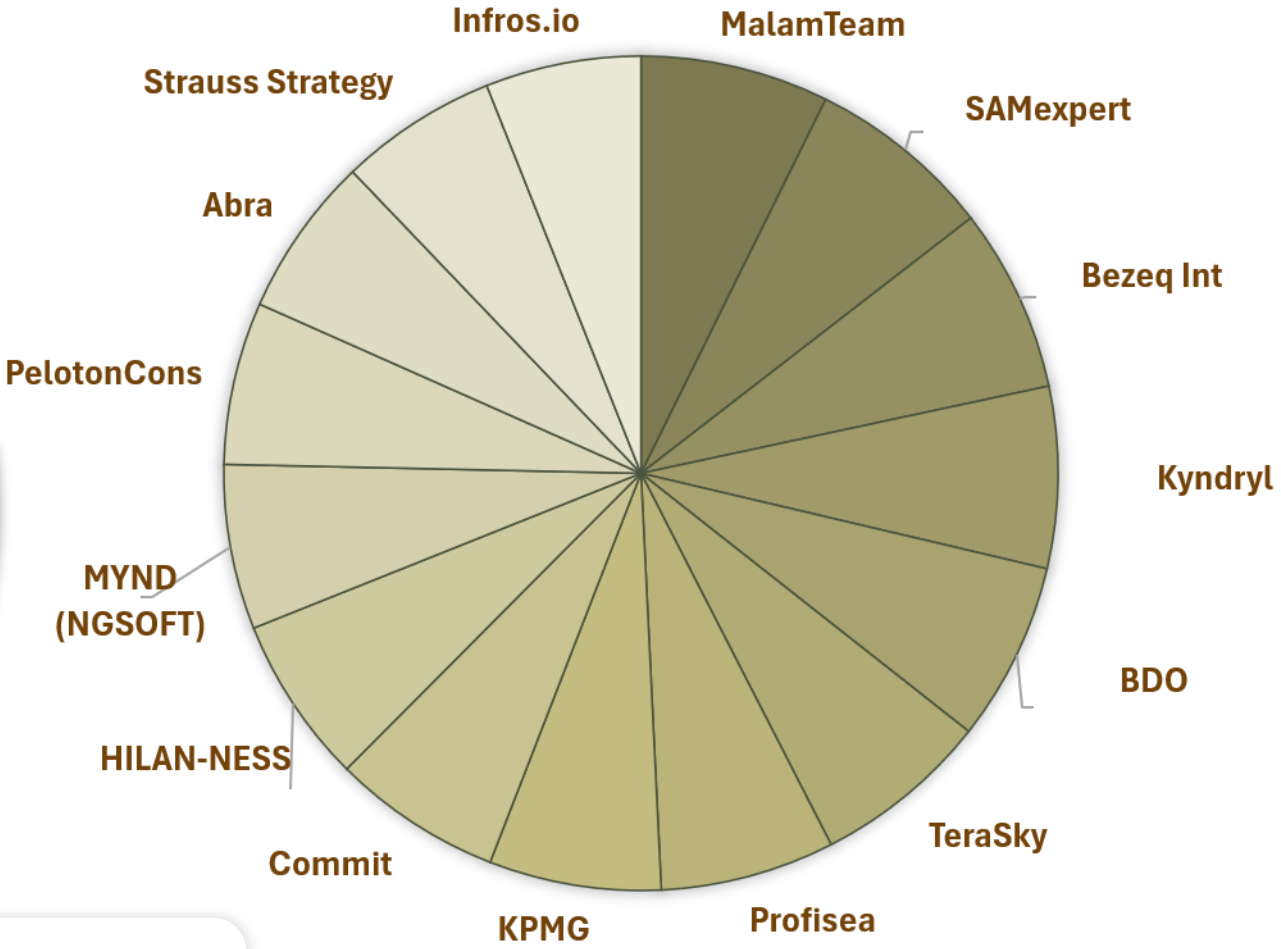
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value added services

FINOPS dedicated Services



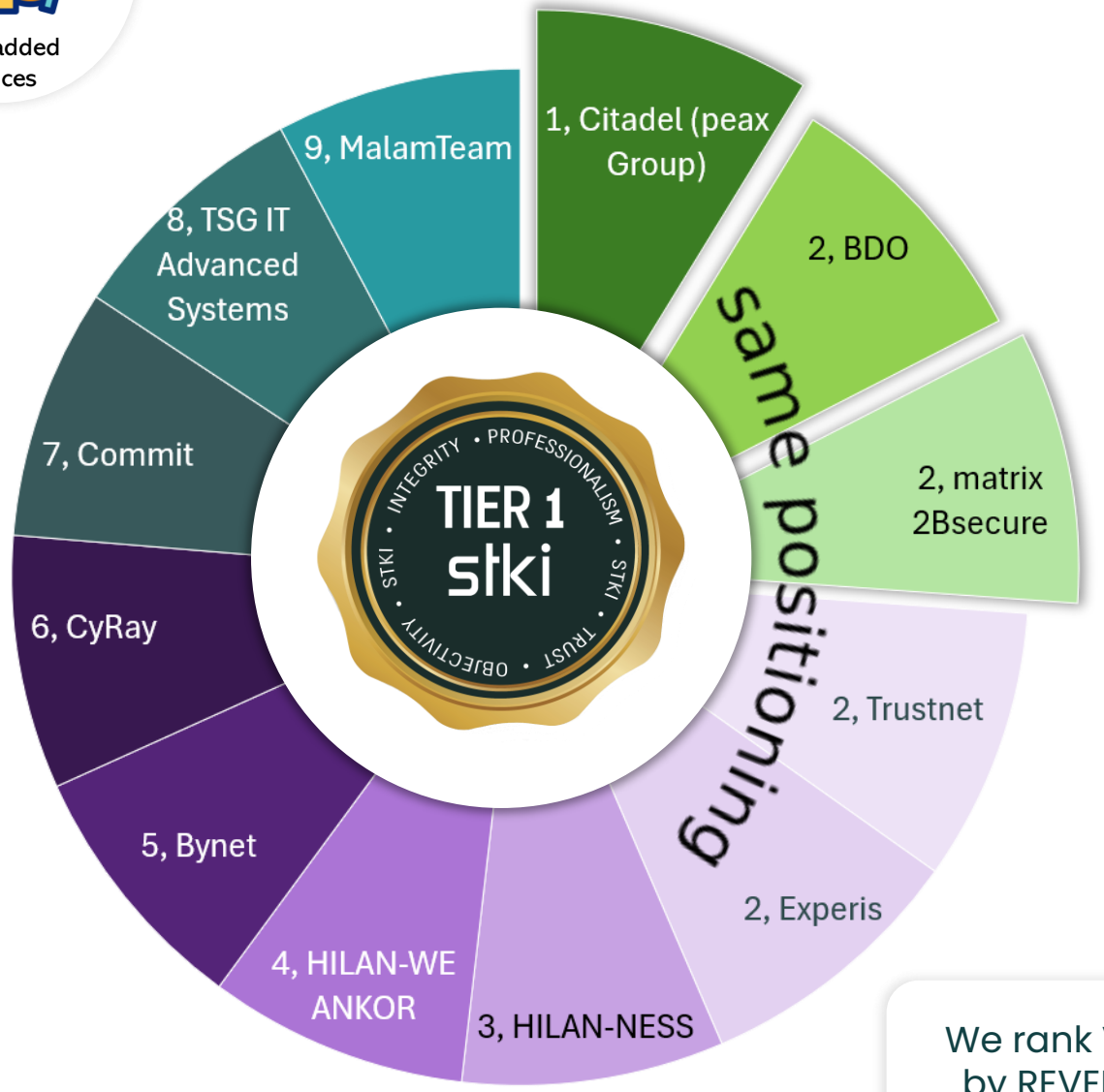


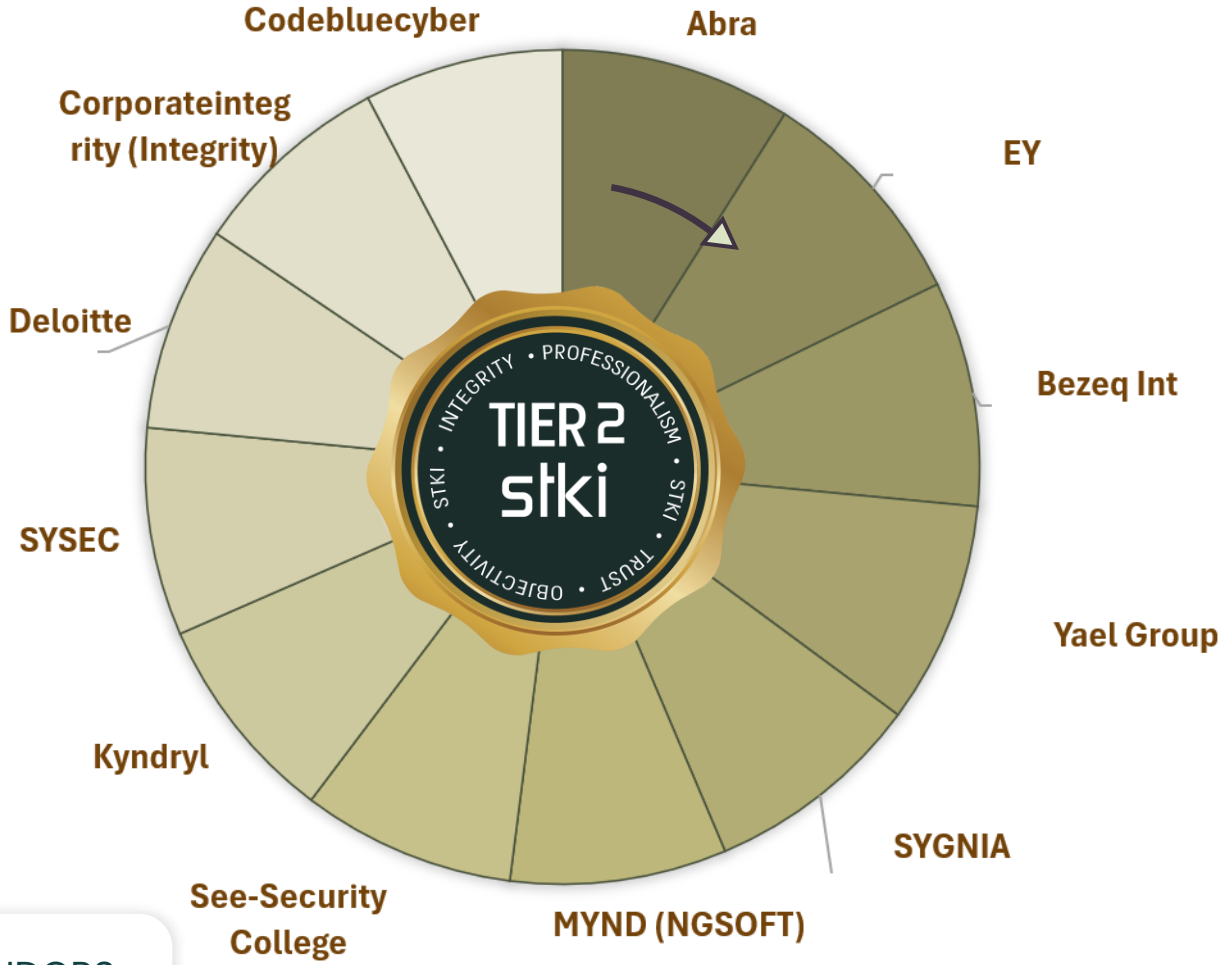
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value added services

Managed Security Services (SOC, MDR, etc.)





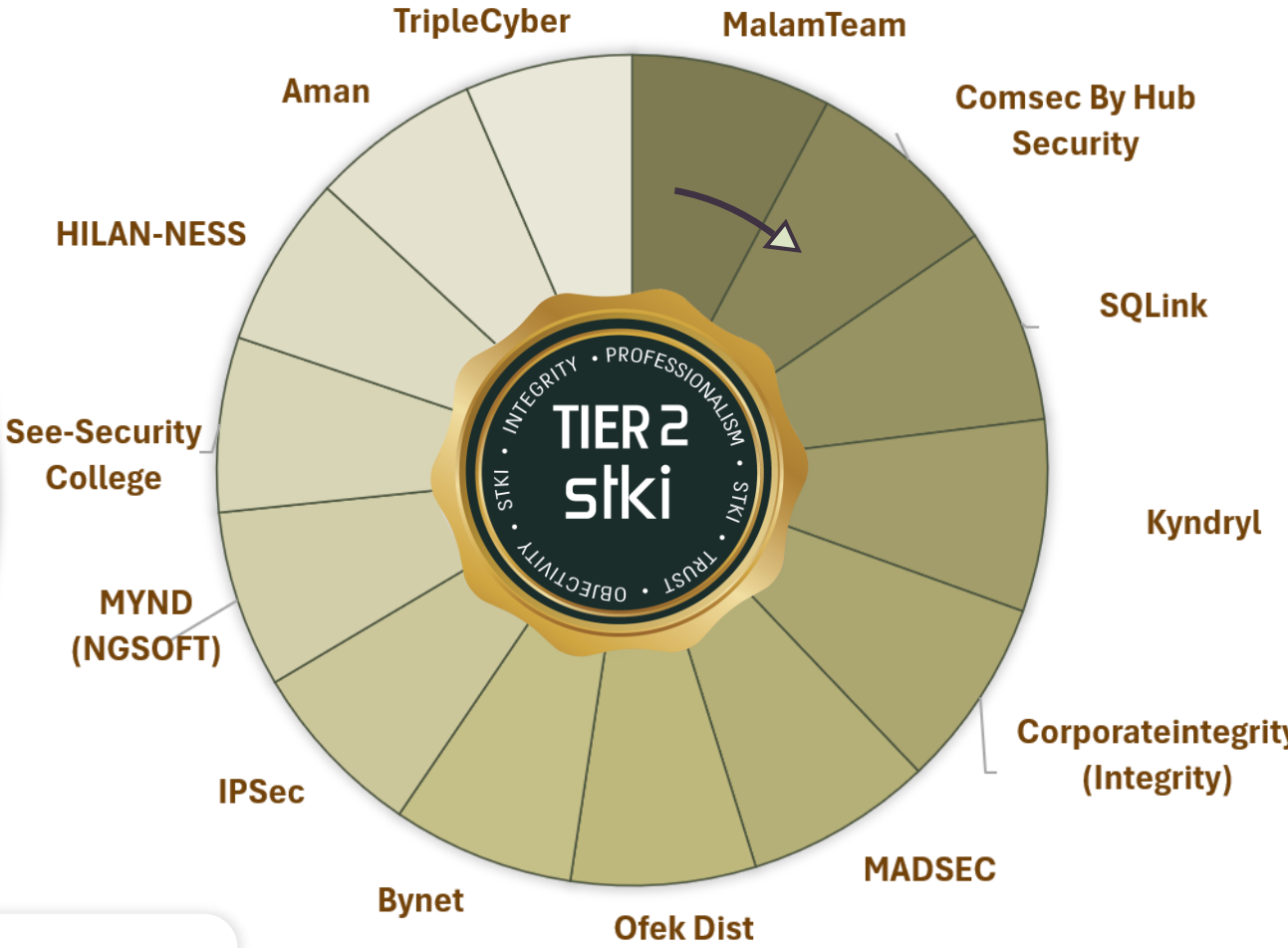
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value added services

CISO as a SERVICE





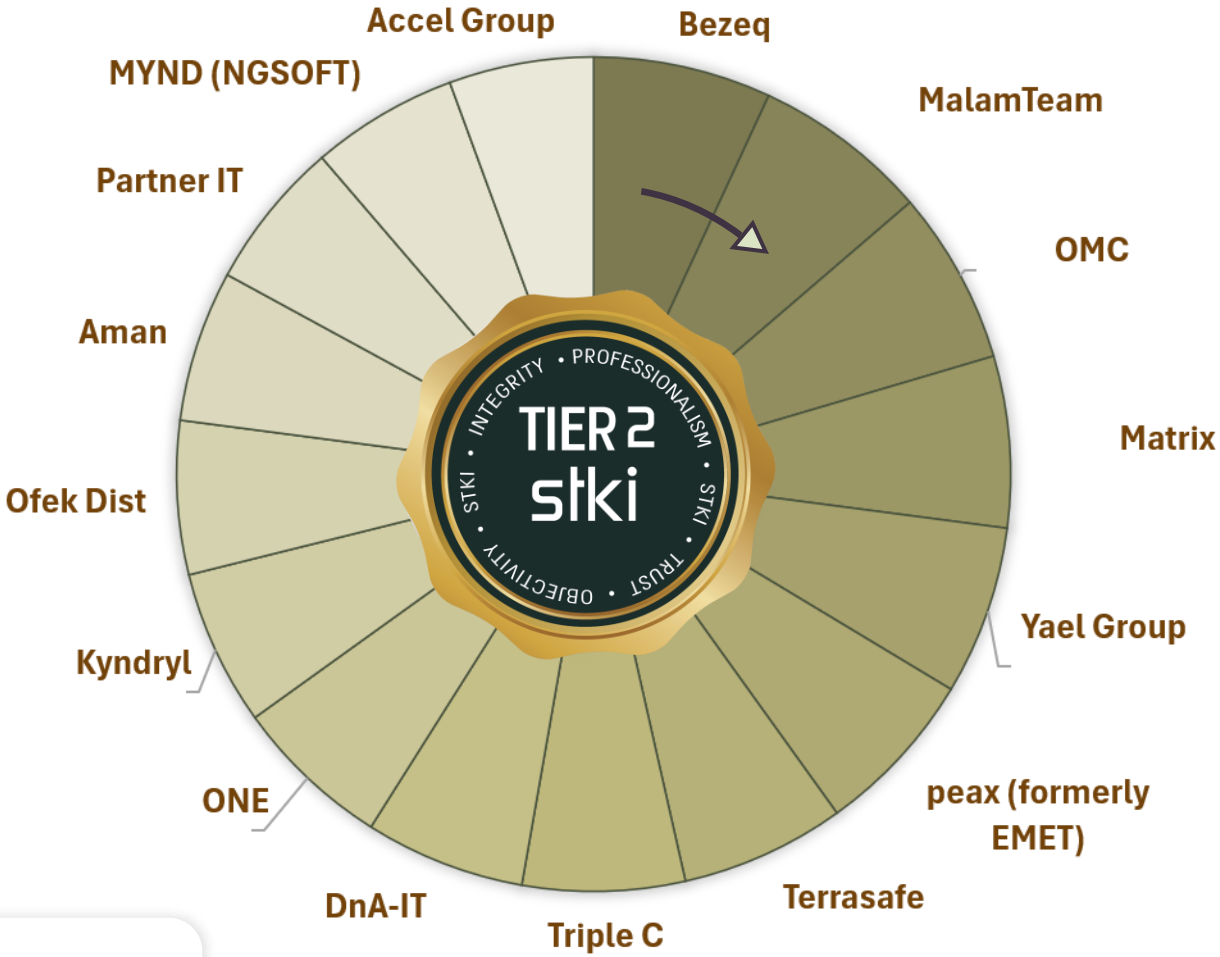
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Backup & DR as a Service

value added services





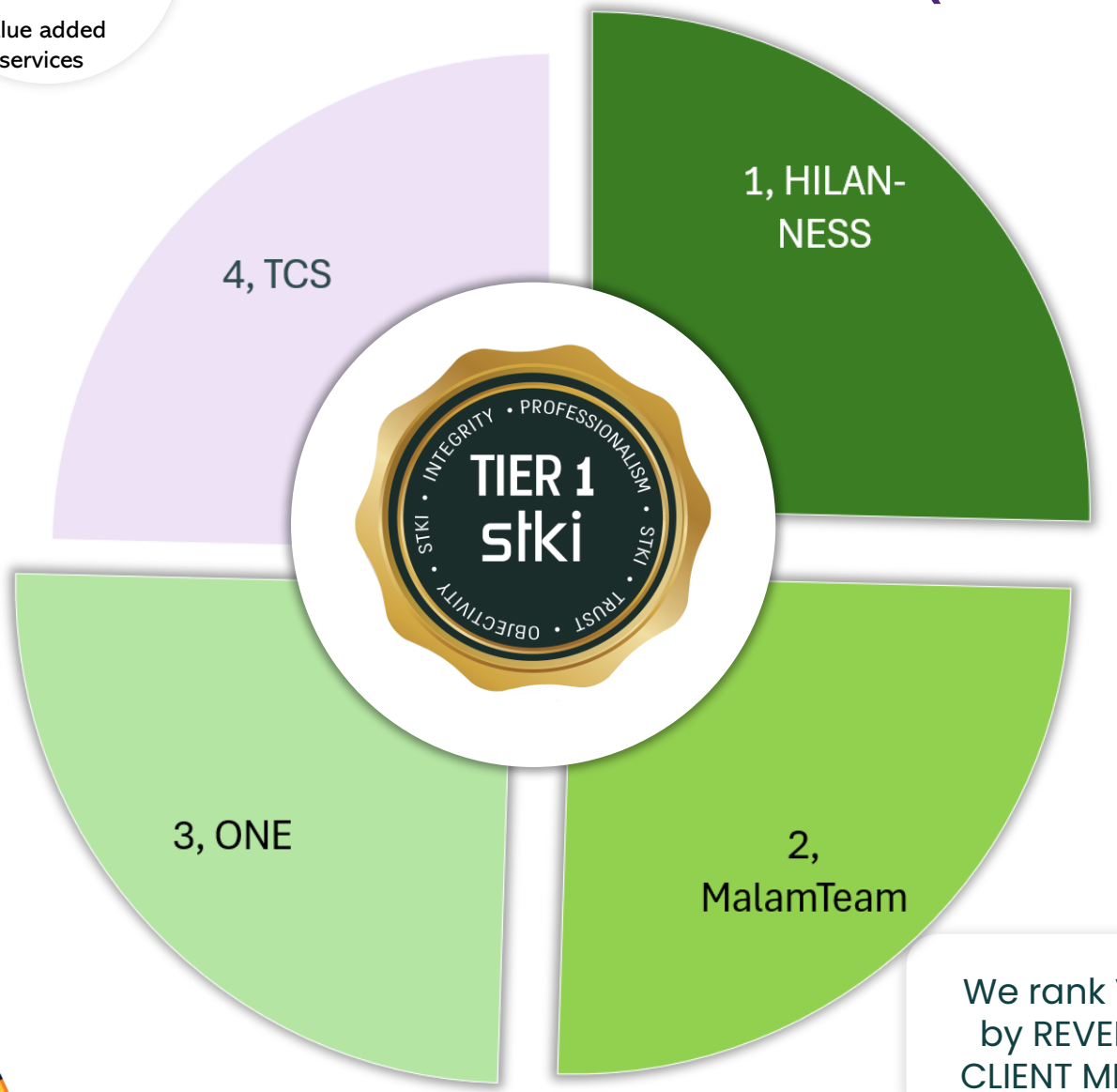
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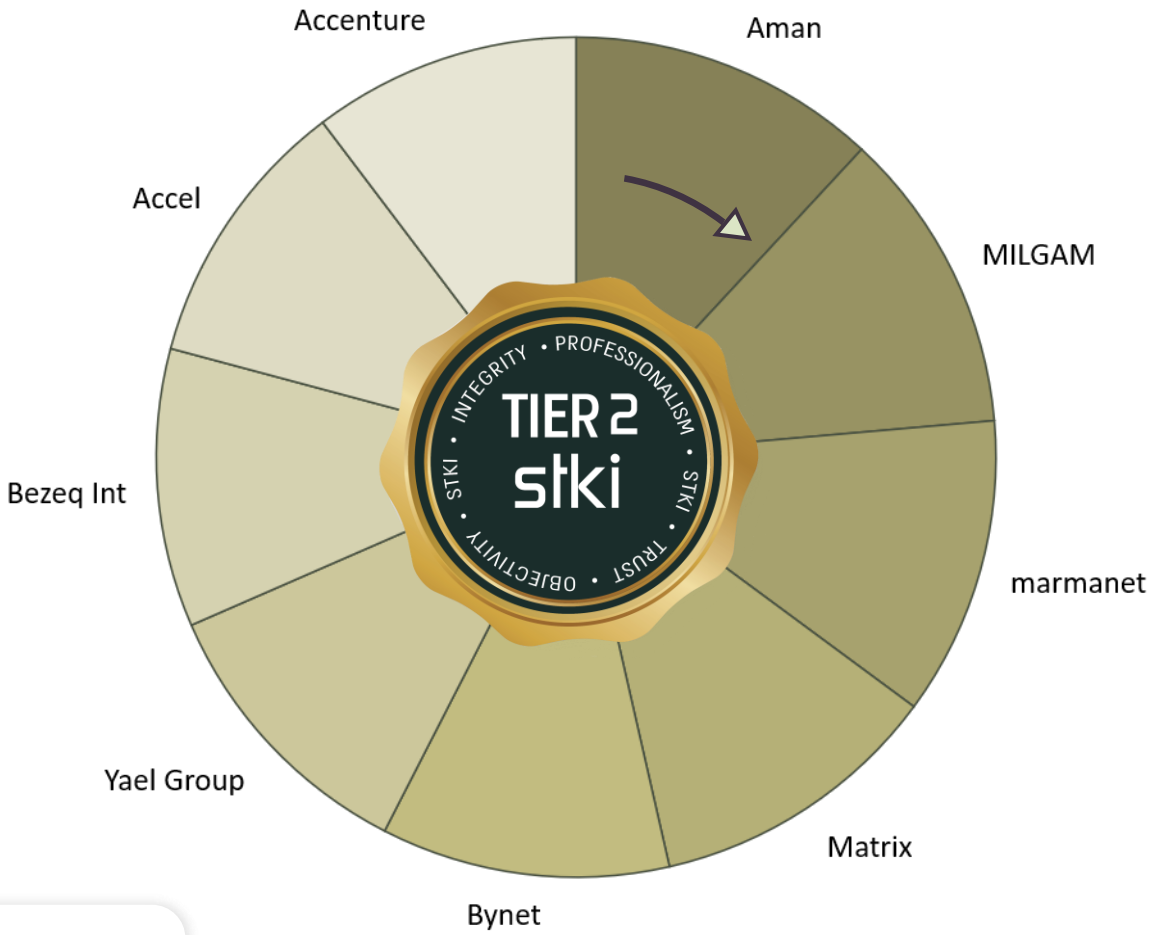
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value added services

Business Services as a Service BSaaS

(Salaries, Payments, BPO, etc.)



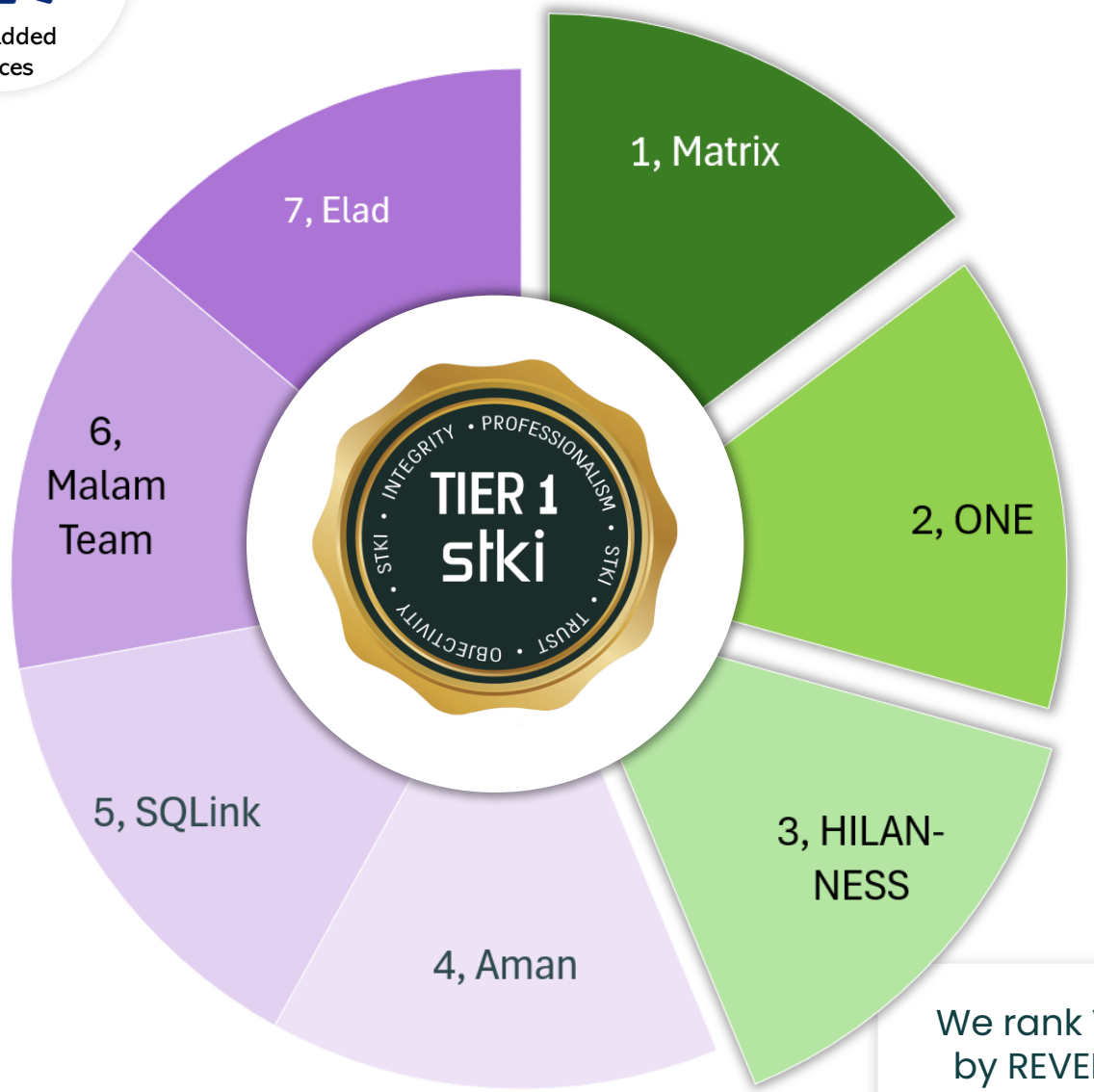


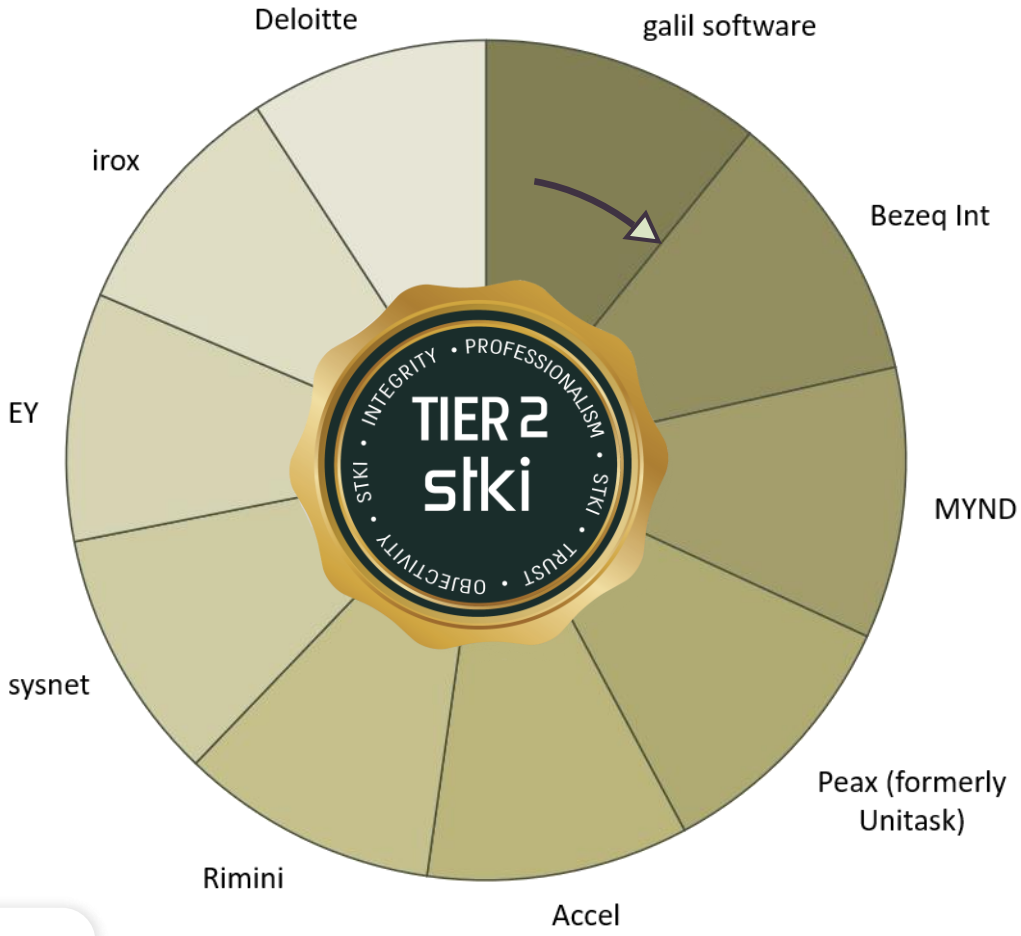
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value added services

Near shore





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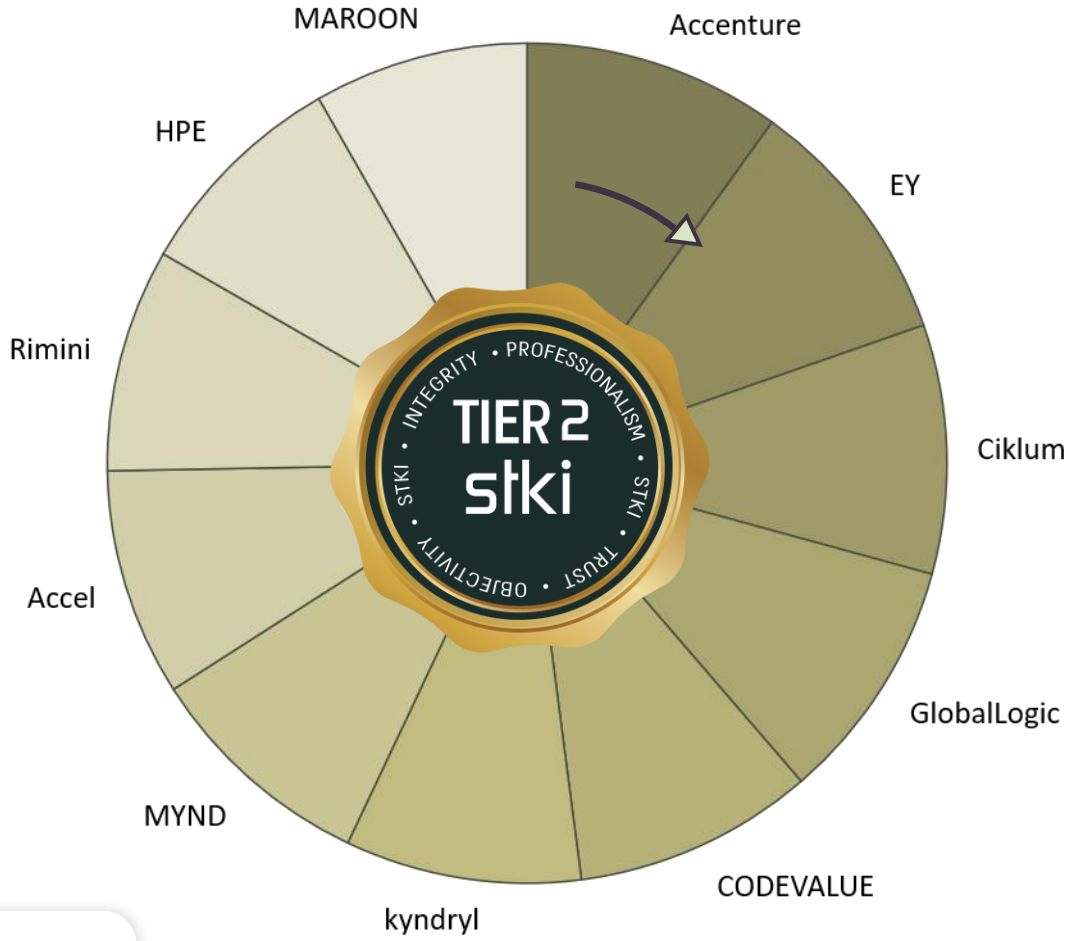
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value added services

Off shore



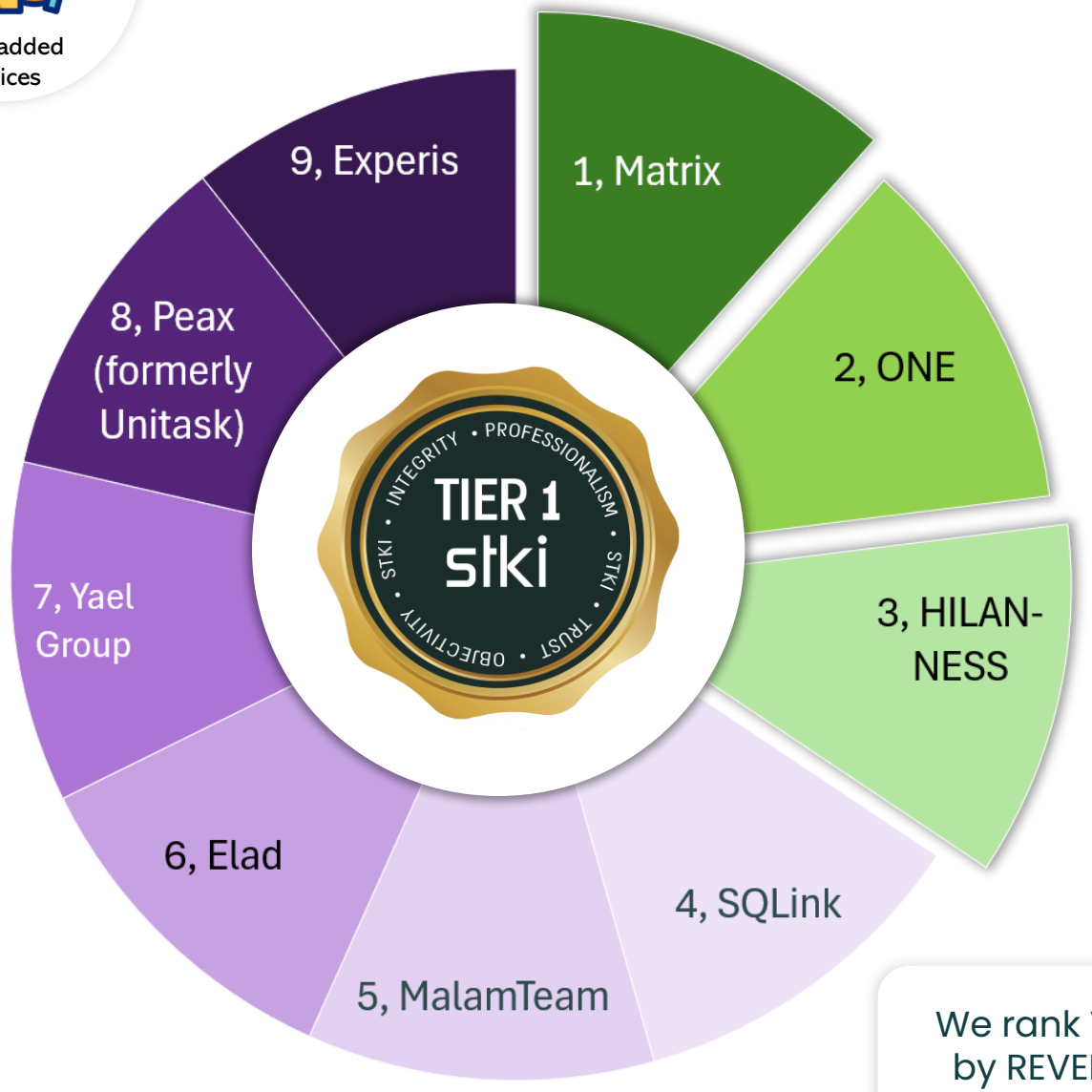


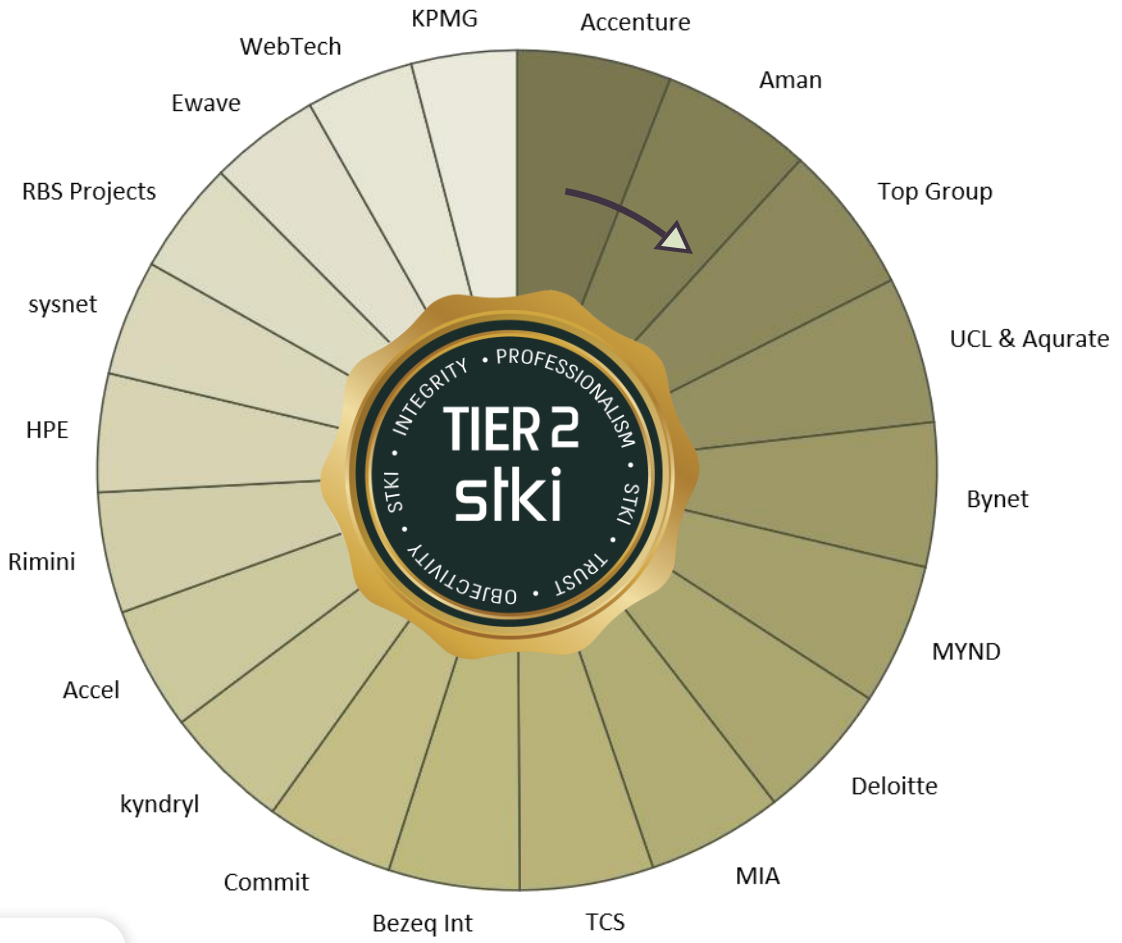
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value added services

Staff Augmentation (gulgalot)





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Einat Shimoni



Pini Cohen



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