Israel IT Market Study 2025 Part 1

Dr. Jimmy Schwarzkopf

Galit Fein

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GenAI Analyst

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Jimmy is a founder of STKI (META Israel) and holds degrees in Engineering (BSE & MSE) and in Business & Entrepreneurship (DBA & MSIA)

- Areas of coverage:
- Israel IT market
- CIO & IT Management
- Verticals
- Finance
- Health
- Innovation management

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

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

Einat has been working in STKI since 1996, holds a BA in social studies from Bar-Ilan University and an MBA from Tel-Aviv University .

Areas of coverage:
Customer engagement strategies:

- Customer Experience
- CRM
- Marketing Automation
- Omni channel
- Service Design

Data driven transformation:

- Data strategy
- Data operations
- Data science, Machine Learning and AI
- Democratization
- literacy and monetization

Reut joined STKI during 2021 , holds MBA in Finance from University of Haifa and MBA in Data Science Analytics from Tel-Aviv University

- Areas of coverage:
- Enterprise Applications – ERP, SCM…
- eCommerce
- WCM – Web Contant Management
- ECM - Enterprise Content Management, KM
- HCM, HR and work environment
- EX - Employee Experience
- QA and Testing technologies and software
- Call Center
- Productivity Tools

STKI Research Team

Pini has ben working in STKI since 2000, Pini holds a BSc in Computer Science from Technion and MBA from Tel Aviv University Cum Laude

- Areas of coverage:
- Cloud strategies and operations
- Cloud native development and architecture
- Traditional Hardware and Data Center
- Devops and cyber operation environment
- Finops and data platforms
- Middleware and modern integration
- Technology procurement management

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Methodology and how to “understand” the results

Dr. Jimmy Schwarzkopf

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

Over **33 years of experience** in the IT analyst sector and thousands of annual face-to-face interviews with key industry participants have enabled STKI analysts to establish solid, long-standing relationships with customers.

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

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

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

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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
- In-house Workshops
- CIO Annual Meeting (during the summit)
- COO Community meetings & workshops
- OCIO Community meetings & workshops
- CTO Community meetings & workshops
- Brainstorming (based on Design Thinking) Workshops
- **STKI Annual Summit (Trends)**

Unlike some research and advisory firms

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 2024

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

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

XOOs of Presentations (Frontal and video)

45 Round Tables
64 Webinars
2 Summits per year

Israeli Annual IT Market Study

250 CIOs
16 Industries

456 Vendors
150 Categories
Over 1000 Products/Services

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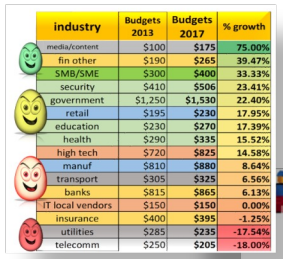
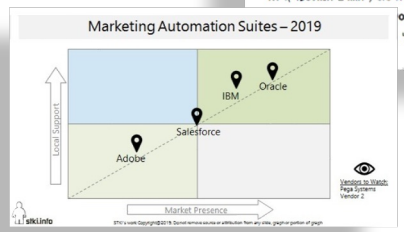
1. IT Trends
2. Surveys about organizational issues
3. Round Table Summaries
4. Industry IT Budgets
5. IT Market Forecasts by category
6. Vendor Tiers by category
7. Product Positioning
8. Staffing Ratios
9. Other

STKI Research Results:

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



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%



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

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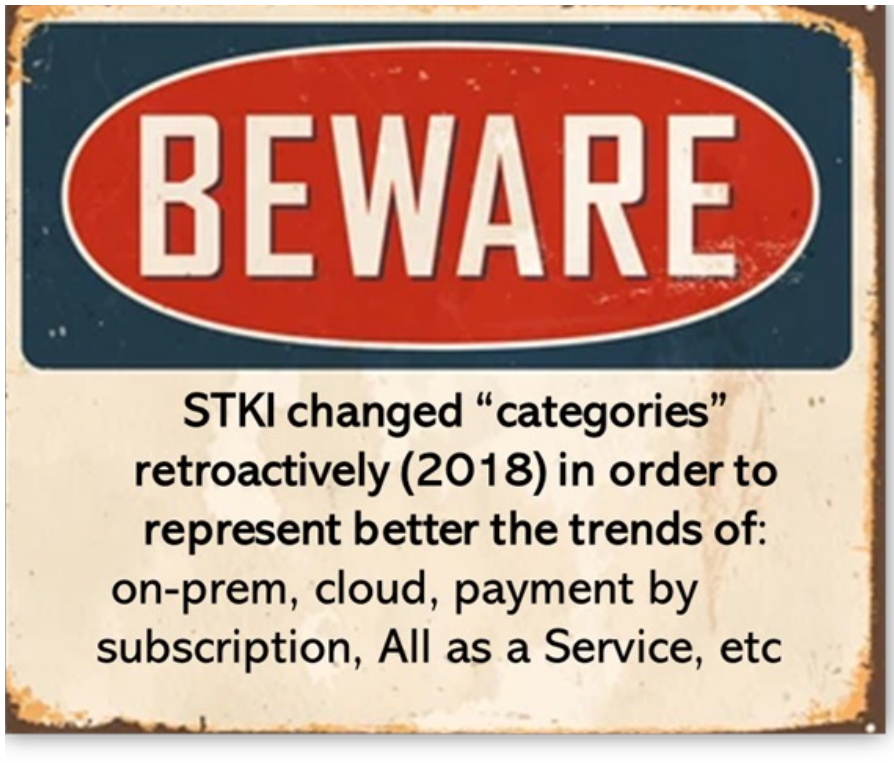

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STKI Methodology: Equilibrium model

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

Most research firms are either

"DEMAND-BASED"

(market information based on data from users of IT)

"SUPPLY-BASED"

(market information based on data from IT vendors).

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

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

Technology Users

What users bought?
From whom?
Why?

Technology Vendors

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

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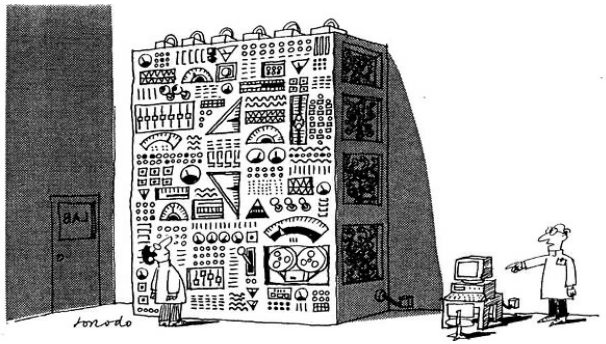

That's just to impress STKI'S analysts. This is our real results

We rank VENDORS by REVENUE and CLIENT MINSHARE

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

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710 VENDORS Were ranked in this study

Some IT vendors in the study are:

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

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

Vendors page #1

10Secure
Stream11
2bcloud
3Bears
5IVE
10A
A2Z
ABP Consultancy Israel
abra
Accelario
Accenture
Accesslayers Portnox
Acoustic
Acronis
ACS
Actifio
Adobe
Advantech
Afek Systems
Agile Experience
Agile Spirit
agilepoint
AgileSparks
AGINIX
AI Smart Stream
Ajimeh
Akamai Technologies
akt
Alation
ALEXANDER SCHNEIDER

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

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

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

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

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

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

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

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

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

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Vendors page #2

IRONSCALES
irox
IT solutions
it Assist
ITCC (IT Care Center)
ITNAVPRO
ivanti
Jenkins
JFrog
Juniper (HPE)
k2view
KAKADOTECH
Kaleidoo by Bynet
KALITVI API Solutions
Kamedia
Kapow Solutions
KEYSIGHT
Kiteworks
KMC
KMS-Aman
KMT
KnowBe4
KnowEdge
KONFIDAS
KPMG
KPMG R&D Edge
kubecost
kyndryl
Lenovo

Liacom
Lightbits
Linnovate
LIOR LURYE
logiCloud
Log-On
LogRhythm
Lotem
MADSEC
Magalcom
MAGENOFEK
magic
Make (formerly Integromat)
MalamTeam
ManageEngine
Manyone
marmanet
MAROON
matan consulting
Matrix
matrix 2Bsecure
matrixDnA
matrix Bi
Mavkyim Software Solutions
mce
McKinsey
MedOne
MedSec
MENAHEL 4 YOU
mendix
Methoda
MIA Analytics (SAS)
Microsoft
MicroStrategy

MIDLINK (Emet)
MilestoneZero
MILGAM
mindU
MINICOM
MIRACLE
mobideo
mobisec
moblin
model9
modelZ
monday.com
MongoDB
moveo
MSP
MySP
Nagich by click
NAYA Tech
NEBIUS
neo4j
Netalizer
NetApp
Netcraft
netskope
NEWAGE
new relic
nextcom
NGG
MYND (NGSOFT)
NICE
NICE RPA
nintex
Nintex Kryon
nipendo
NOGAMY
Normative

NowSecure
NPTech
Nutanix
nVIDIA
Oasis-Tech telrad
OCTOPUS
ODI
odoo
okta
OMC
Omega Israel
ONE
ONE - Pivotal
onelogin
oNet Systems
OpenLegacy
Opentext (Micro Focus)
Opisoft (SQLink)
Opisoft-Genius (SQLink)
OPSWAT.
Oracle
Oracle Consulting
orca security
ORO CRM
OutSystems
Own {backup}
P.Z. Projects
PagerDuty
PaloAlto
PANDUIT
Panorays
PARTICLE
Partner
Pecan
Pega Elad
Pelican-Tech

PELOTON
PENGUIN SOLUTIONS
PENTERA
PERCONA
PERFORCE (testcraft)
pingdom
Pionet
PMG (Pravda Media Group)
PMZONE
PNMsoft
portnox
PractiProject
PRIMSEC
Priority
Proceed (HMS)
ProcessGene
Profisea
PROLINK
Prologic
proofpoint
Passler AG (PRTG)
ptc
Pulse Secure (Ivanti)
PUREPEAK
PURESTORAGE
Puzzlehead
PwC
Pyramid Analytics
Qesem Consulting
Qlik - Attunity
Qlik - Talend
QMASTERS
QUALITEST

Quest
quilliup
Radiflow
Radvision
radware
RANCHER BY SUSE
Rapid7
RAZ-LEE
RBS Solutions
Reblaze
Red Hat
RED BUTTON
redis
Rels
Renaissance
RESCANA
RESOLVE Systems (Ayehu)
Rewire (before was Micompany)
Rimini Street
Rittal
RiT Tech
riverbed
Rivery
Rockwell
RSA
rubrik
RUCKUS
SafeBreach
SailPoint
Salesforce
Salesforce- Tableau
SALT
Saninteractive

SAP - Emarsys
sas
Sasa Software
I Sciforma
SDS
Securenet
SecuriTeam
See-Security College
Sela
Semperis
SenseCOM
SentinelOne
SEPIO (cyber)
Serverfarm
Servicenow
SEVENTH DIMENSION
Sheket Technologies
SIGA
Signature-IT
Sikreta Group
SingleStore
Sinopia
sisense
SIT
SKYBOX (Security)
SMARTBEAR Software
Smart IT
snowflake
snyk
Softimize
SOFTPRO
Software AG
Solaredge
SOLARWINDS

Sonatype (Nexus)
SOPHOS
Spanning
Specterx
SPEEDVALUE
Spider (Emet)
SPIKEIT (Emet)
SPINNAKER SUPORT
splunk (cisco)
SQLink
SSP
STKI
StrategiClear Consulting
Strauss Strategy
Stulz
SUPERMICRO
SYGNIA
Synerion
synopsys
SysAid
sysdig
SYSEC
sysnet
Systematics
SysTrack
tadiran telecom
Taldor
Tamares Telecom
Tamar Communications
Tamayo
TASC (Consulting)
TASKTOP
TCS
TechMind
Telecom Experts

Tenable (Nessus)
Teradata NCR
TeraSky
Teraworks
TEST PRO
Test craft
Testim
that's it
Tibco
TICOMSOFT
TIKAL
one Digital
Tiuv System Consultants
Todan
Top Group
Top Group - Panorama
Train Mate
Trellix (Mcafee)
Trello
TREND MICRO
TRAID Security (by Yael Group)
TriggerPlus Software
Triolla UX (ex Pitango)
Triple C
TripleCyber
TripleT
TRIPP-LITE (by Eaton)
TRUNOVATE
Trust iT
Trustnet
TSG IT Advanced Systems
tufin
TutIT soft
Tvuna (SQLink)
Twingo by Commit

twodo
TZUR
USER ACCESSIBILITY
UBTECH
UCL
ui
UiPath
Unicloud (Emet)
Unitask Group (Emet)
UXVision
Valor Solutions
ValuePlus
VANTIQ
VARONIS
VAST Data
Veeam
Veidan
VeNotion
Veracity (Emet)
Cohsity (VERITAS)
VIRGONET
vision.bi
vmware
VOTIRO
walkmaze (application care)
WebFocus by Tibco
WEBISCOPE (by Aman)
WebTech
WEDO (Emet)
WECHANGE
WEKA
WEKU
WERTECH
WHITE-HAT
wideops
WINNER CODE (Emet)
WINIT
WIZ

workato
WSO2
Xioma (Top Group)
Yael Group
Yael Business Applications
Yael Infrastructure
Yael All Data
Yael IFN
Yael Smartsoft
Yael Triad
Yael Consienta
Yael CloudTech
Yael Opsguru
Yael Acceptic
Yael Realcommerce
Yael NetCloud
Yael Integration
Yael Korentec
Yael Korentext
Yandex Cloud
YAZAM TECH
YOUTCC
yoyo
Y-tech
zadara
Ze ZEBRIUM
Zemingo (Emet)
Zigit (SQLink)
ZIPCOM
ziv systems
ZOHO
Zscaler

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Rankings are based… : important please read

We rank VENDORS by REVENUE and CLIENT MINSHARE

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

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

- **Yearly revenues** of hardware sales and hardware maintenance
- **Yearly revenues** of software subscriptions & licenses, software maintenance
- **Differentiation** between new projects and continuing projects (**New projects count more)**
- **Distinguish** between work done by the **vendor's employees and work outsourced to other vendors**. The **revenue should be transferred** to the vendor **actually doing the work.**
- **Differentiate** revenues from **projects done in fixed price, cost plus (SLA defined)**, **managed services and those done by staff augmentation (non-SLA) projects.**
- **Differentiate value** of work done by **high level internal** professionals in a project versus that done by **staff augmentation** employees in the clients IT department.
- We **do not include** any work/ products for **OEMs and military non-IT projects**.

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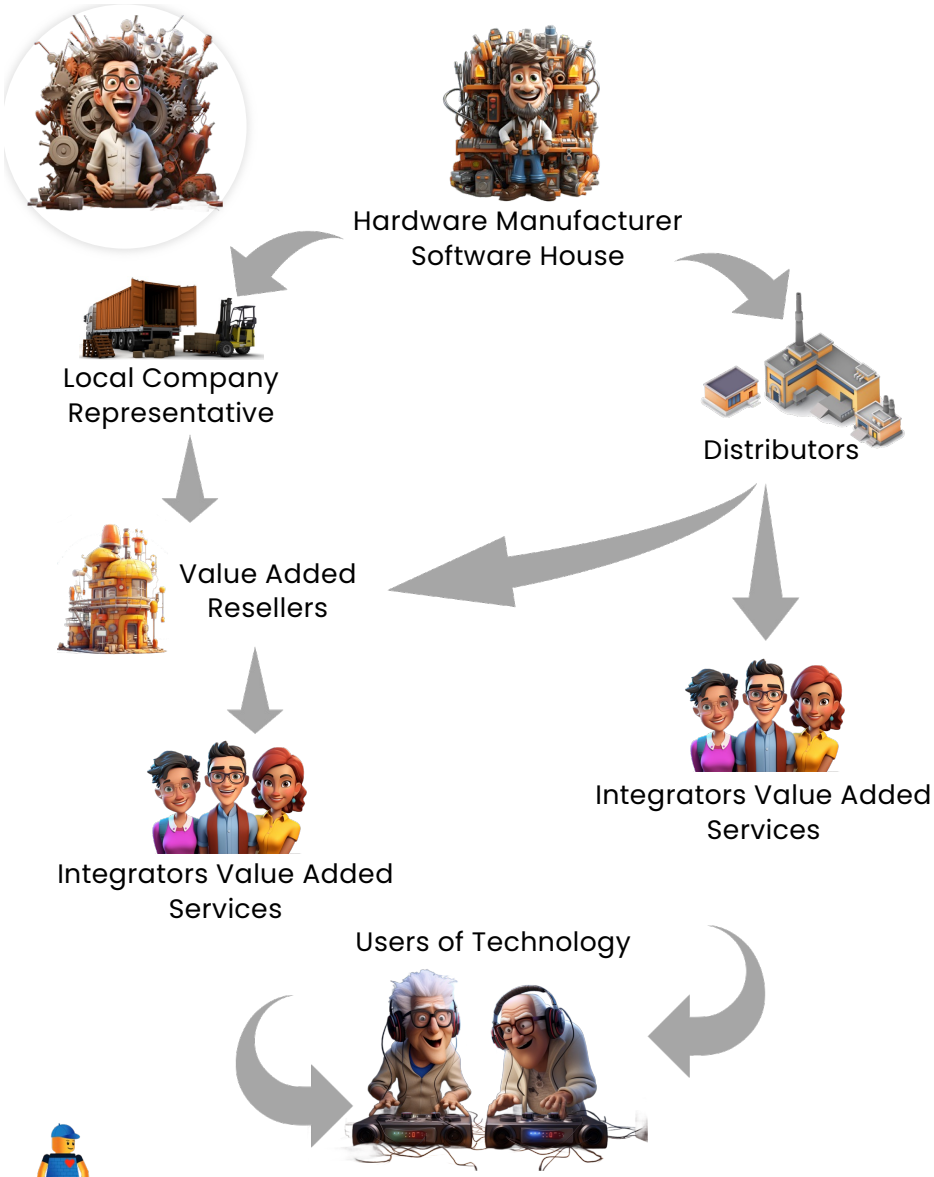
Manufacturers/Software Houses, Distributors, VARs NO double bookings for IT Market Size Forecasts

VALUE ADDED

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

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



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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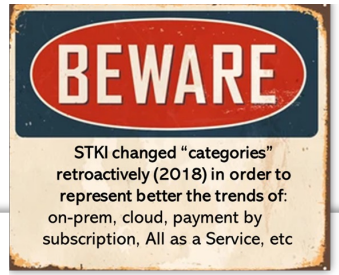
USER of IT

VENDOR of IT



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

CATEGORIES

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

IT Trends
2025-2027

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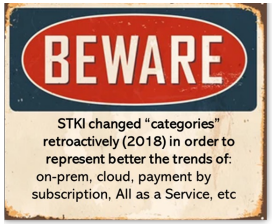

Over 160 Categories (Revised)

Infrastructure Products & Services

servers X86
Legacy (non-x86)
Data Appliances and AI computing
HCI appliances
Window PCs (Notebook & Desktops) Enterprise only
Non window's PC's Enterprise only
Enterprise Storage :Disks (HHD and SSD)
Other Storage HW - Tape Libraries & appliances, VTL Backup
Storage Networking
Enterprise Networking
Security / Cyber Appliances
VoIP/Call Center Equipment
Call Center as a Service
Data Center Physical Equipment
Off-site Data Center: Co-Location; Hosting (Client owns the HW)
POS +Self Service (ATM/Kiosks/other)
Generel Purpose Cloud consumption

Infrastructure Products & Services

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

Software Products (usage fees, licenses, subscriptions, SaaS and maintenance)	
Infrastructure & System Software (including storage software)	**Data Governance and Management Tools (including data catalogs, ETL, quality, cleansing)**
data platforms (SQL, NoSQL dbms)	**Data Science and Analytical AI (ML) Platforms**
Cloud data platforms (SQL, NoSQL dbms)	ERP
App\WEB Server, Emulation, , BRMS APaaS (container platforms) Integration Streaming IPaaS	CRM
IT (+cloud) Operations, Asset Management, APM, AIOPS Monitoring, Workload-Scheduling ITSM, Service Desk	HR/ Talent Mgmt./ LMS
FinOps tools	Marketing Automation Software
Endpoint related tools	Contact Center and Multi channel engagement tools (Chatbots, Virtual IVR, Video, Voice, etc....)
Network\Web cloud services (FW, WAF, ddos services , etc.)	E-Commerce Platforms
data content related tools (DB FW, DLP Halbana, etc.)	Web Content Management Platforms
cyber management tools (SIEM tool, Incident responds, automation)	PLM Systems
Zero Trust including identity, access, SDP software defined perimeter, SASE (secure access service edge) IDM, Access	Blockchain platforms
Cloud security protection tools (CNAPP CSPM CASB)	GIS Platforms
Other cyber tools (secure development, awareness etc.)	IOT tools and platforms
Project & Portfolio Management	**RPA Platforms**
Development tools, ALM, Devops for all environments (including Mobile)	**Generative AI tools and platforms**
Low Code tools	**Agentic AI tools and platforms**
Governance, Risk & Compliance	*Logistics Software (WMS, transportation, etc)*
Regulation Software	*Financial Software (loans, mortgages, 360 client view, payments and other financial market software)*
Office productivity (office calendar, mail etc.), KM (Enterprise Portals, ECM, Search, Knowledgebases tools)	*Military Software (digital apps , analytics, etc)*
Digital Output Management/Customer Communication Management	*Retail Management Software*
Employee Collaboration, Task Management & Engagement Tools	*Healthcare Related Software*
BI Tools	*Education Digital Software*

VAS
Value Added Services
(professional services)

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

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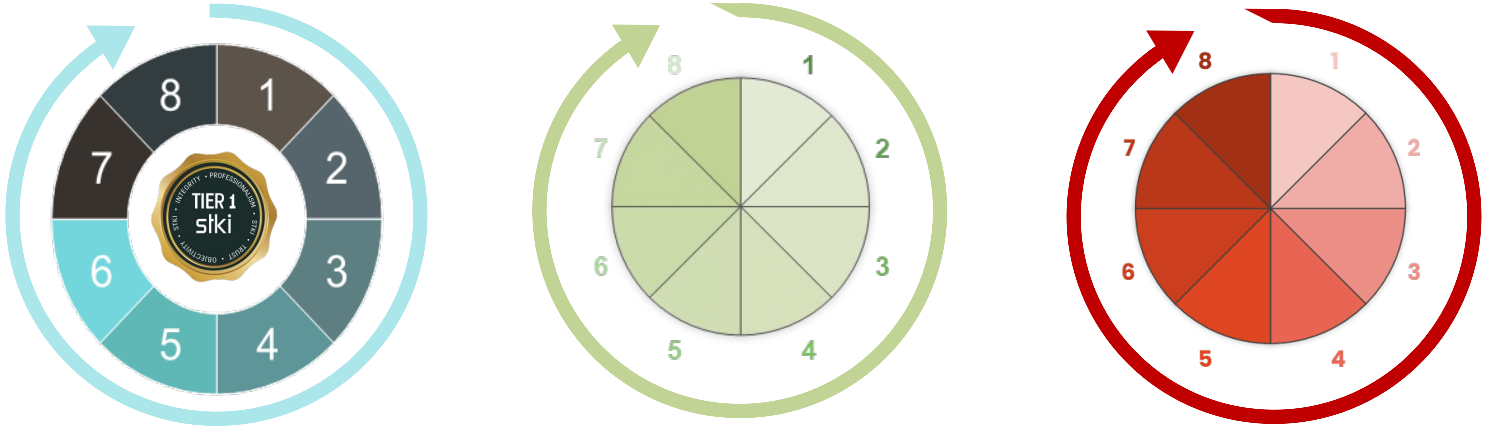
important please read

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

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

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

Tier One Companies → Smaller Companies → Small Boutique Companies or Departments



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

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

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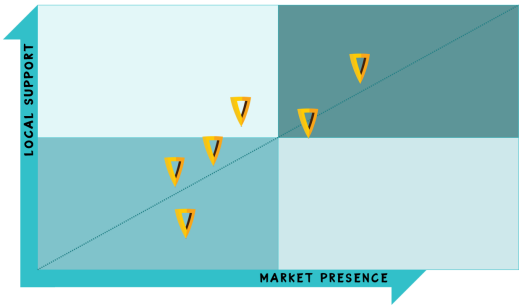
“Israeli Positioning” for products

NOT a **technological or functional positioning** and **SHOULD NOT** be used as such. This positioning is 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:** marked according to international analyst firms

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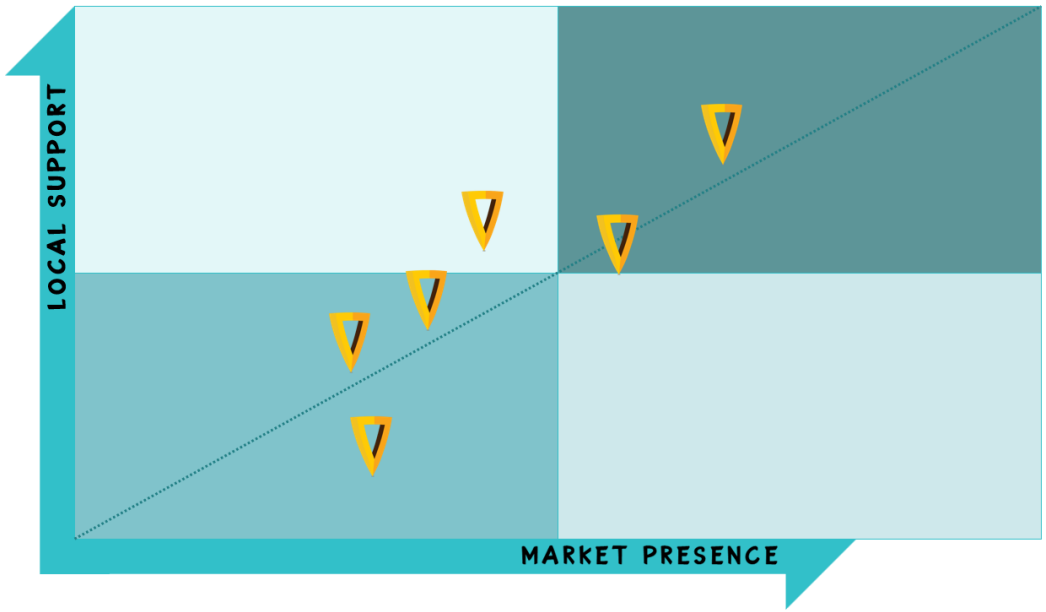
Y axis (Local Support)
Number and Quality of support experts, it's localization and language support and if there is local R&D



X axis (Market Presence)
Installed base; New sales ; Mindshare

Global Leaders
According to international analyst firms

Vendors to Watch
New players that only recently entered the market and therefore cannot be evaluated against longtime players

This is **NOT** a technological or functional positioning and **SHOULD NOT** be used as such. This positioning is intended to reflect **ONLY THE DEGREE** to which a product is **PRESENT AND SUPPORTED IN ISRAEL**

Israel

Economy, Business activity

Dr. Jimmy Schwarzkopf

Galit Fein

Einat Shimoni

Pini Cohen

Reut Shefer Bar

GenAI Analyst

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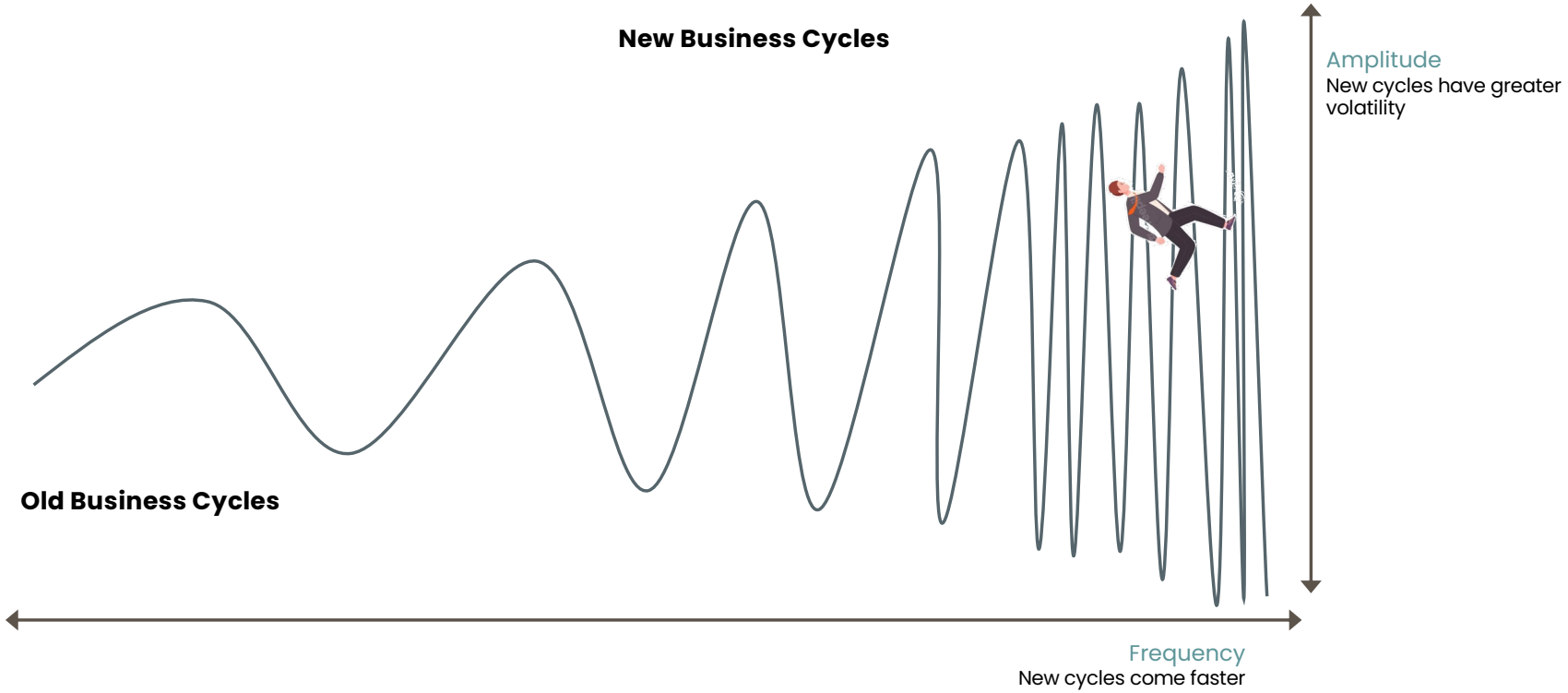
THE ISRAELI BUSINESS WORLD IS CHANGING
companies must do more with less (and fast)



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Israel's Economic Summary

Initially, economists expected **one to two interest rate cuts** and **inflation around 2.6%** by the end of the year.
However, new optimistic indicators have led to **diverging forecasts**, with some predicting **more aggressive rate cuts starting in the summer**.

Key trends:

- **Stock Market :** The **Tel Aviv 35 index** has risen **nearly 6%**
- **Risk Premium**: Israel's **credit default swap (CDS) risk premium** has dropped **30%** since October, signaling improved investor confidence. This decline suggests that financial markets view Israel's economic outlook more favorably, especially following geopolitical stabilization and stronger macroeconomic indicators.
- **Shekel Strength**: The **shekel has appreciated 7% against the dollar**, reaching a **two-year high** against major trading partners.
- **Inflation & Taxes**: While **December's inflation rate** was **3.2%** (lower than expected), upcoming **tax hikes** on **water, electricity, property, VAT, and vehicle purchases** may push inflation toward **4%**.

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Macroeconomic Environment Summary

- Israel entered the conflict with a low fiscal deficit and manageable Debt/GDP.
- The fiscal deficit will be reduced in 2025 by fiscal adjustments of nearly 2% of GDP.
- Israel's risk premium declined significantly since the ceasefire with Lebanon and general geopolitical improvements
- Israel's Net Export Account (+$25 billion) and Foreign Direct Investment ($17 billion) remained strong during the conflict helping support a stable shekel.
- The high-tech products and services sector continued to thrive during the conflict, despite army reserves mobilization. High-tech exports, nearly 20% of GDP and about 60% of total exports, are expected to expand rapidly by 4.5% in 2025 and 5.0% in 2026. This upward trend was already pronounced in 2024 and is expected continue in 2025.
- The Bank of Israel expects the average interest rate in 4Q'25 to be between 4.0% and 4.25%. The interest rate forecast assumes that the direct economic impact of the conflict will persist until 2Q'25.
- GDP is expected to gradually align with its pre-conflict trend, growing 4.0% in 2025 and 4.5% in 2026.
- The Bank of Israel expects private consumption to continue to grow by 7.5% and 5.5% in 2025 and 2026, respectively

https://www.jefferies.com/wp-content/uploads/sites/4/2025/03/Israel-in-the-New-Middle-East-March-2025.pdf

Microeconomic Environment Summary

- Economy activity is resilient even amidst growing regional instability, including preparations for an expansion of the conflict in Gaza, attacks in Syria, and a missile landing near the airport, reportedly launched from Yemen. Thousands of reservists have been mobilized to meet operational demands Additionally, wildfires in the Jerusalem area further clouded the atmosphere during Independence Day.

- Although a slowdown in economic activity is expected (driven by both tax hikes and price increases) credit card purchases grew by an average of 1.5% in the first quarter compared to the previous quarter. This is particularly impressive given that some spending was brought forward to December ahead of the VAT increase, and that an increasing number of Israelis are traveling abroad (whose spending is not included in this data). Israeli households are characterized by a high rate of private savings, meaning that consumption could potentially increase to compensate for income erosion.

bank hapoalim
financial division

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Another Economic Outlook

The Israeli economy in 2024 was significantly affected by the **Middle East conflict**, leading to disruptions across four key areas:

1. **Government Spending & Deficit**:
    1. **Defense expenditures surged**, pushing the **budget deficit to 6.9% of GDP**.
2. **Currency Depreciation & Inflation**:
    1. The **shekel weakened against the US dollar**, contributing to **inflation**, which stood at **3.2%** for the year.
3. **Investment & Credit Rating Decline**:
    1. **Domestic and foreign investments fell** due to increased risk.
    2. **Credit rating downgrades**:
        1. **S&P** lowered Israel's rating from **AA– to A** (negative watch).
        2. **Moody's** downgraded Israel from **A2 to Baa1** (negative watch).
4. **Trade Disruptions & Supply Constraints**:
    1. **Steel and cement imports from Türkiye declined**, affecting **construction and real estate**.
    2. **Red Sea shipping disruptions** raised import costs.

https://www2.deloitte.com/us/en/insights/economy/global-economic-outlook-2025.html

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Another Economic Outlook 2

Capital Markets & Interest Rates

- **Stock Market Performance**:
  - Israeli markets **underperformed globally** for most of 2024.
  - **Q4 2024 saw a sharp recovery**, with **TA 35 returning 15%**, compared to **S&P 500's 2%**.
- **Government Bonds & Interest Expenditures**:
  - **Bond yields increased**, raising **interest costs for the government**.

Economic Outlook for 2025

Israel's economy is expected to recover, driven by **reduced geopolitical threats** and **stronger market confidence**:

- **GDP growth forecast: 4%**
- **Interest rates: 4.5%** (expected to remain stable)
- **Inflation: 3%**, influenced by:
  - **Tax hikes** (VAT, property tax) pushing prices up.
  - **Potential end of the war** easing supply constraints in **airline and housing sectors**.

https://www2.deloitte.com/us/en/insights/economy/global-economic-outlook-2025.html

Key Factors for Recovery

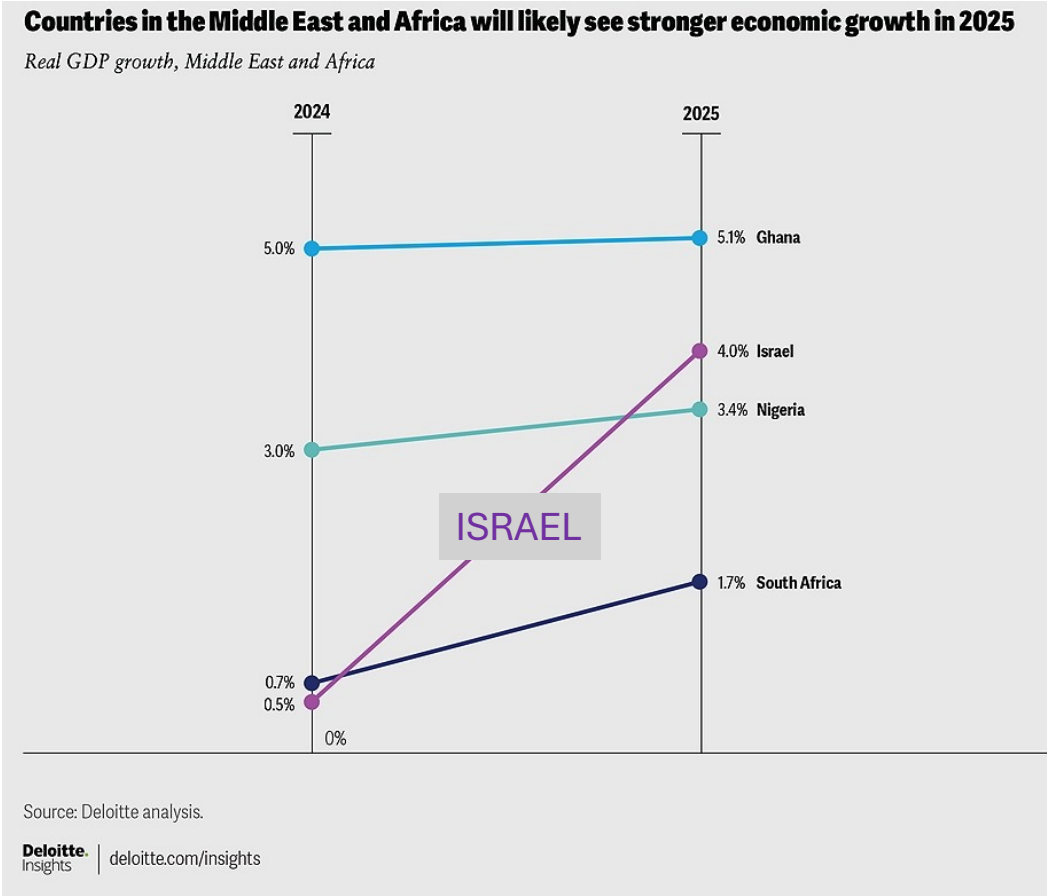
Israel's economic rebound depends on:

1. **Strategic alliances with Middle Eastern countries**.

2. **Government fiscal policy**— balancing **spending cuts** with **growth investments**.

3. **Political stability**, restoring **investor and public confidence**.

4. **Global economic conditions**, especially in **the U.S., China, and Europe**.



https://www2.deloitte.com/us/en/insights/economy/global-economic-outlook-2025.html

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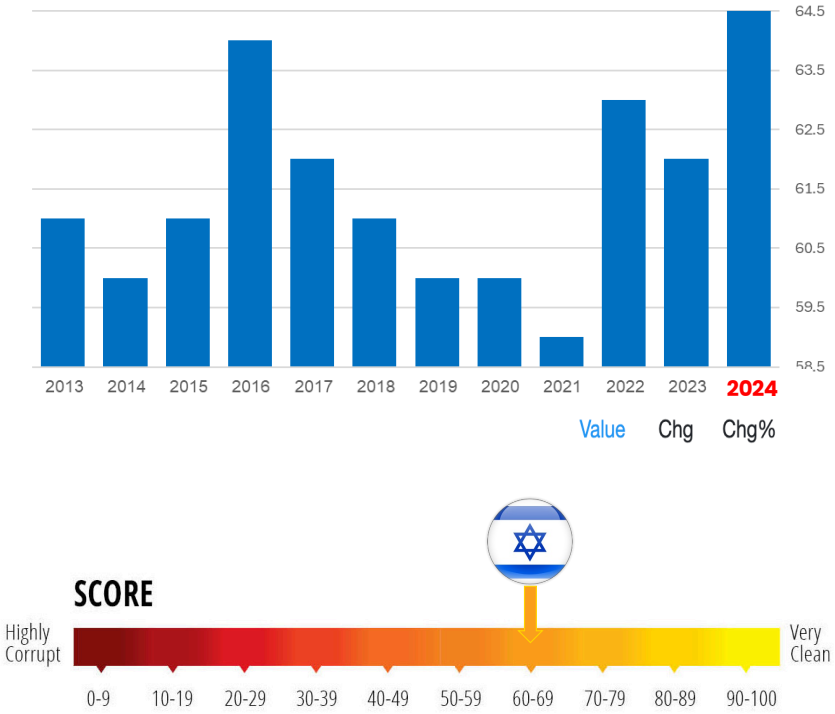
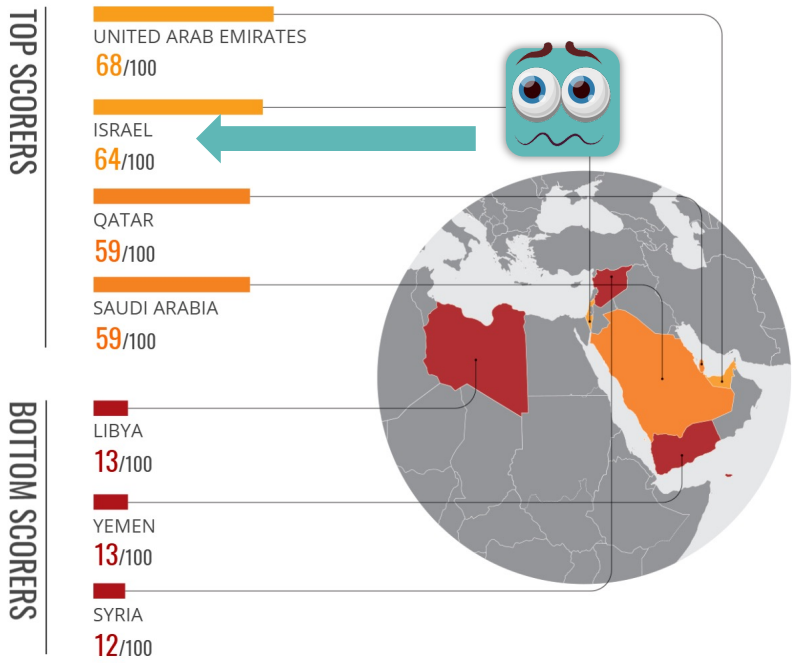
CPI 2024 for the Middle East

Israel scored 64 points out of 100 on the 2024 Corruption Perceptions Index





TRANSPARENCY INTERNATIONAL
the global coalition against corruption

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Economic Surveys: Israel 2025

The Israeli economy has been remarkably resilient to the shock of the 7 October terror attacks and subsequent war.

This strength under exceptionally difficult circumstances stems from:

- Sound fiscal position before the war, deft monetary management,
- Stable financial system
- Strong growth potential owing to high employment rates and a vibrant high-tech sector.

Keeping the economy steady and securing solid growth requires:

- Curbing inflation and containing fiscal deficits while funding future spending needs
- Reforms that address infrastructure gaps and
- Improve educational outcomes and
- Labor-market participation among ultra-orthodox and arab israelis.

Capitalizing on an **already strong artificial intelligence (AI) industry is essential**, by maintaining a flexible regulatory approach and further nurturing links between higher-education institutions and AI firms.

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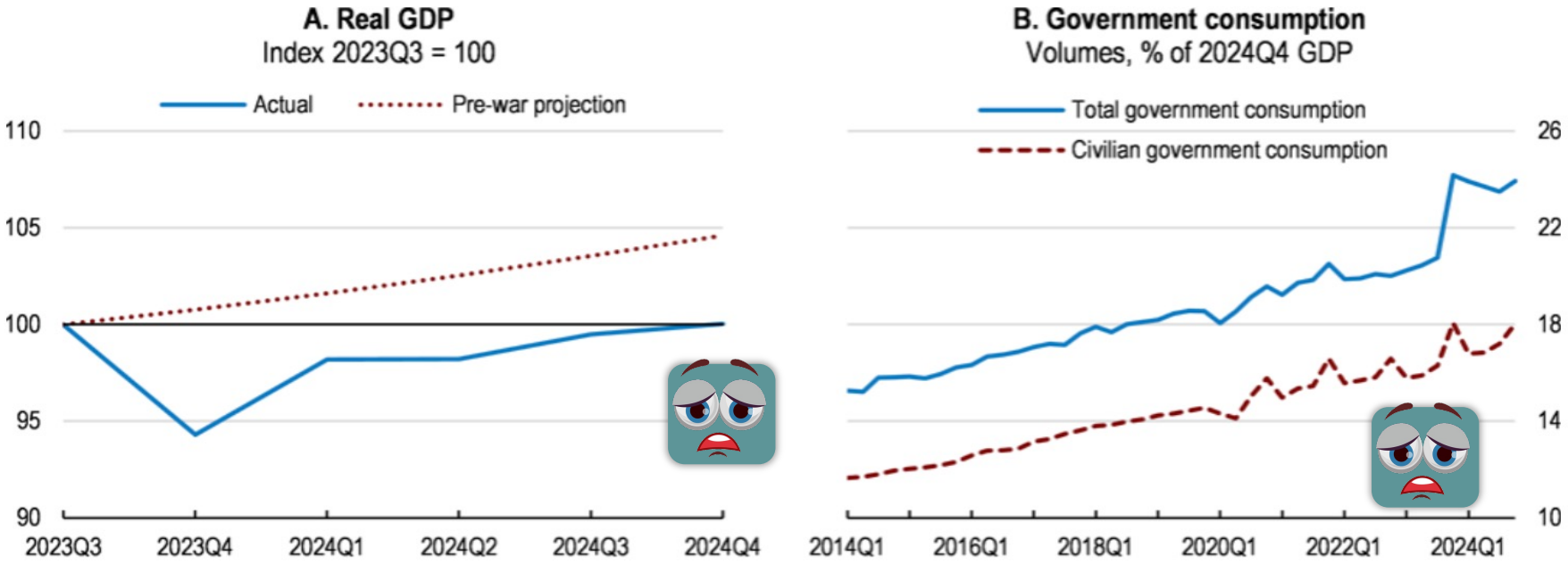
OECD

The war hit the economy hard and prompted a sharp increase in government spending



Source: OECD Economic Outlook: Statistics and Projections No. 116 database; OECD Economic Outlook 113 database; and Israel Central Bureau of Statistics (CBS).

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Israel: Basic economic data – 2019-2024

	2019	2020	2021	2022	2023	2024
Mean population ('000)	9,173	9,325	9,479	9,655	9,845	9,972
Israelis employed ('000)	3,967	3,913	3,957	4,187	4,324	4,371
Real GDP growth rate (percent)	3.7	-2.0	9.4	6.3	1.8	0.9
Per capita GDP (NIS '000, current prices)	155.7	151.6	166.9	182.8	190.8	200.5
Employment rate, ages 25-64 (percent)	77.7	76.2	75.7	78.6	78.9	78.5
Unemployment rate (percent)	3.8	4.4	5.0	3.8	3.4	3.0
Inflation rate (percent)	0.6	-0.7	2.8	5.3	3.0	3.2
Public expenditure (percent of GDP)	39.7	46.0	42.2	39.3	41.5	45.1
Tax revenues (percent of GDP)	30.0	29.6	32.2	32.6	29.6	30.5
Total deficit (-) of the general government (percent of GDP)	-4.5	-11.4	-5.3	-1.9	-6.9	-9.4
Gross public debt (percent of GDP, end of year)	59.1	71.1	67.8	60.5	61.5	67.8
Goods and services exports ($ billion, current prices)	111.3	108.5	135.9	159.7	152.0	151.2
Goods and services imports ($ billion, current prices)	105.7	95.9	122.6	148.6	137.3	138.3

SOURCE: Based on Central Bureau of Statistics data and Bank of Israel calculations.

הלשכה המרכזית לסטטיסטיקה
Central Bureau of Statistics
دائرة الإحصاء المركزية

בנק ישראל
BANK OF ISRAEL

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GDP growth will pick up

Annual growth rates, %

	2023	2024[1]	2025[1]	2026[1]
Real GDP	1.7	1.0	3.4	5.5
Private consumption	-1.2	3.7	5.6	6.0
Government consumption	8.0	13.0	0.9	0.8
Gross fixed capital formation	-1.6	-6.7	8.7	4.6
Exports of goods and services	-1.1	-5.6	4.1	8.9
Imports of goods and services	-7.5	-0.4	4.9	5.2
Unemployment rate (% labour force)	3.4	3.0	2.2	1.6
Index of consumer prices	4.2	3.1	3.7	2.9
General government fiscal balance (% of GDP)	-5.1	-8.2	-4.7	-3.8
General government debt (% of GDP)	61.6	66.2	66.6	65.4

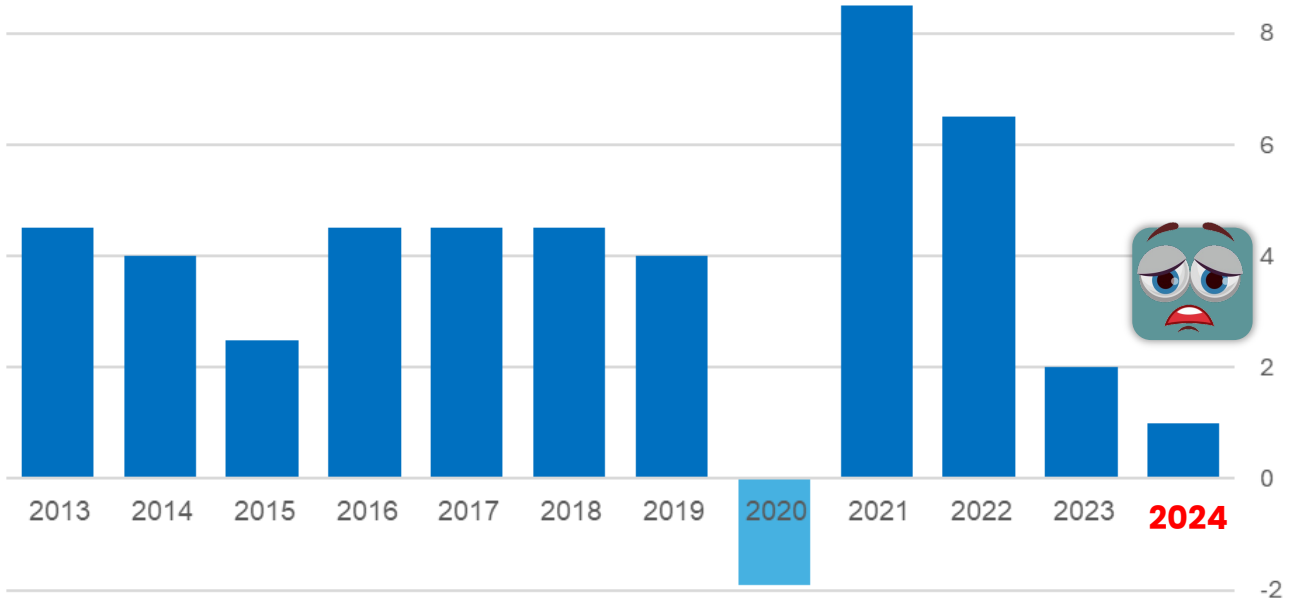
Notes:

1. OECD Economic Outlook No.116 estimates and projections, with updates, and OECD Annual National Accounts database for 2024 GDP growth.

Source: OECD Economic Outlook: Statistics and Projections database.

Full Year GDP Growth

Israel's economic growth slowed to 0.9% in 2024, down from an initial estimate of 1% and 1.8% in the previous year, according to the second estimate. This marks the weakest growth since 2020, when the pandemic severely impacted the economy, as the ongoing conflict with Hamas has also taken a significant toll on economic activity.



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Central Bureau of Statistics
دائرة الإحصاء المركزية

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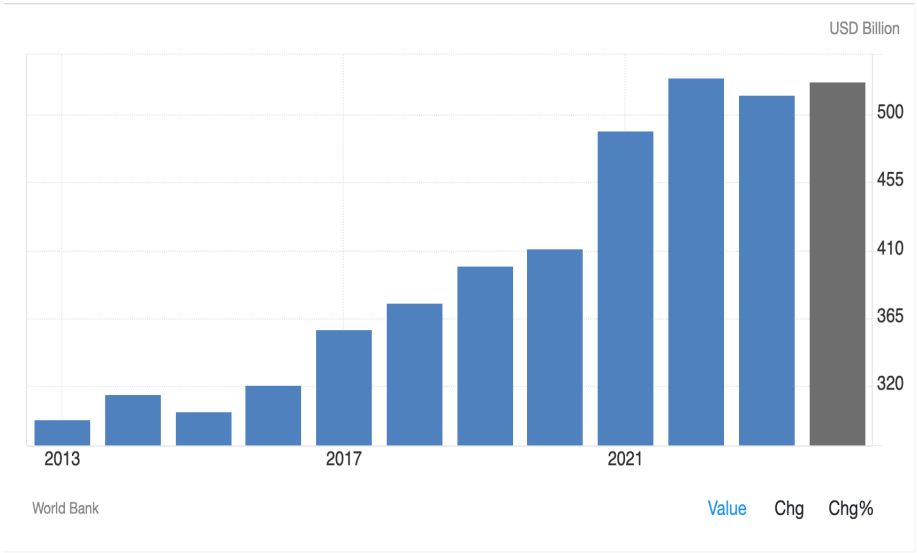
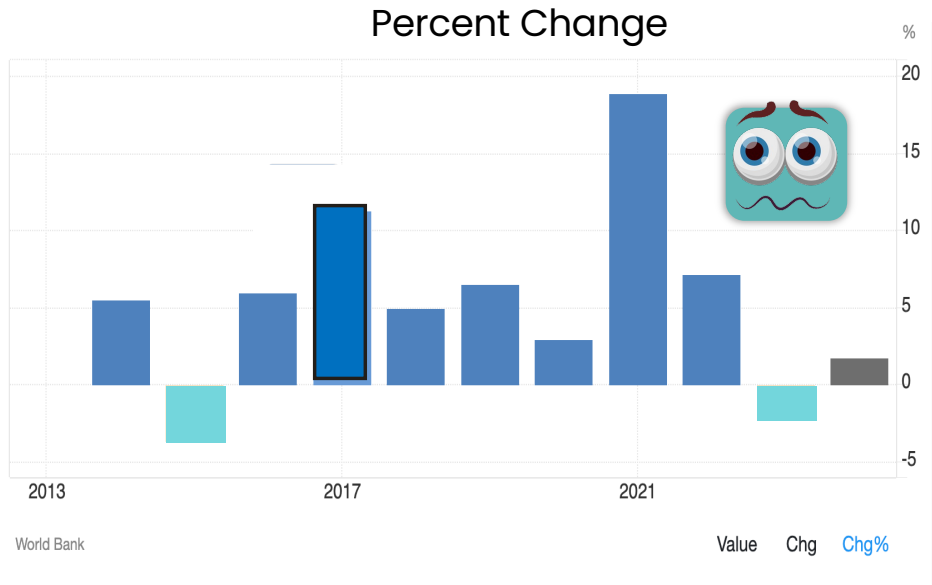
Gross Domestic Product (GDP)

The Gross Domestic Product (GDP) was worth 513.61 billion US dollars in 2023, according to official data from the World Bank. The GDP value of Israel represents 0.49 percent of the world economy.





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THE WORLD BANK

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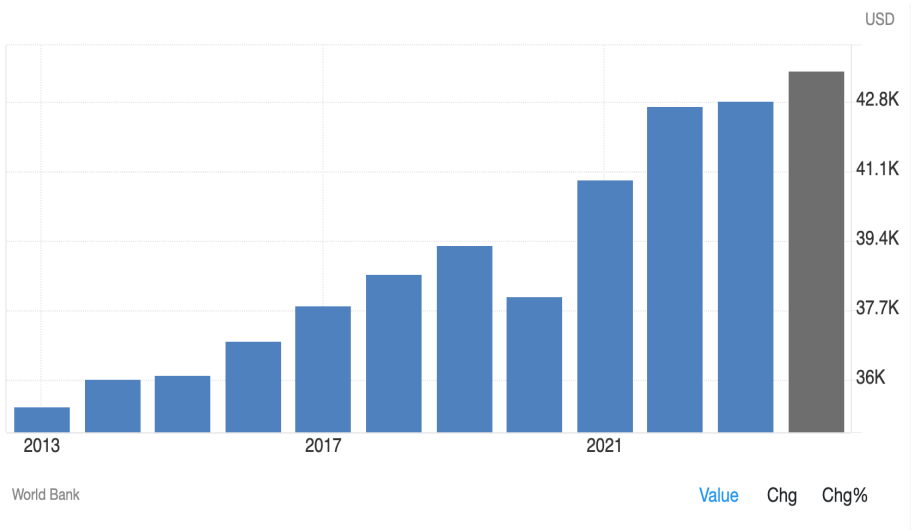
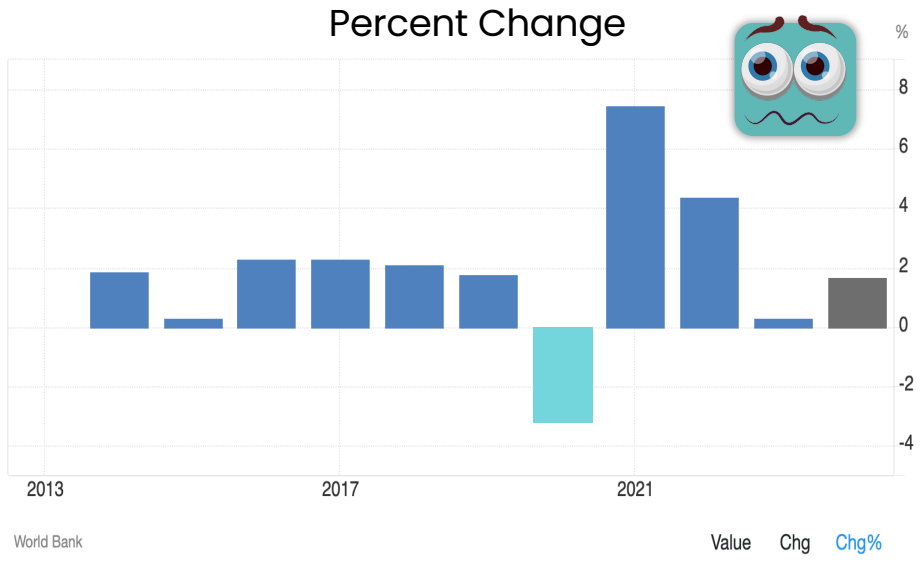
The Gross Domestic Product per Capita

The Gross Domestic Product per capita was last recorded at 42,852.58 US dollars in 2023. The GDP per Capita in Israel is equivalent to 339 percent of the world's average. GDP per Capita in averaged 32,000.95 USD from 1991 until 2023, reaching an all time high of 42,852.58 USD in 2023





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Inflation Rate

annual inflation rate rose to 3.6% in April 2025 from 3.3% in the previous month, exceeding market expectations of 3.2%.

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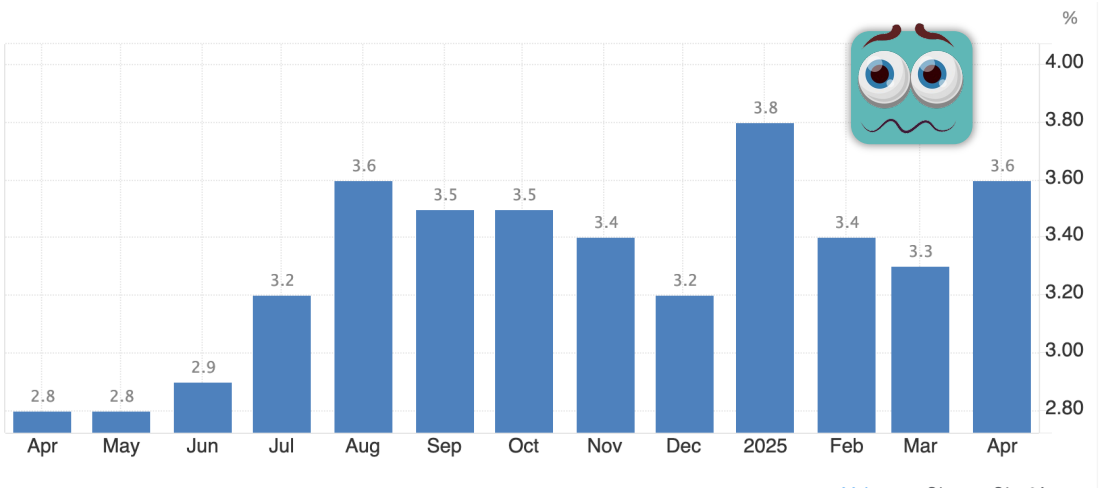

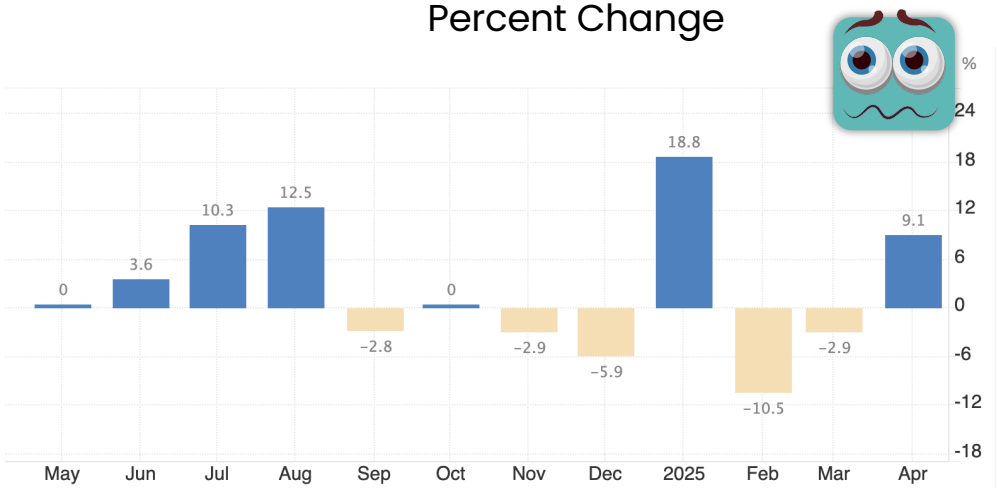

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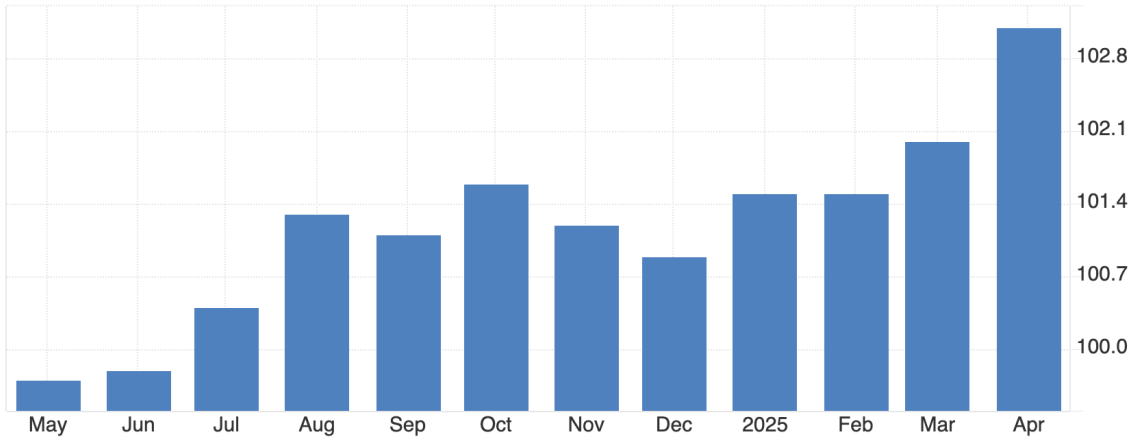
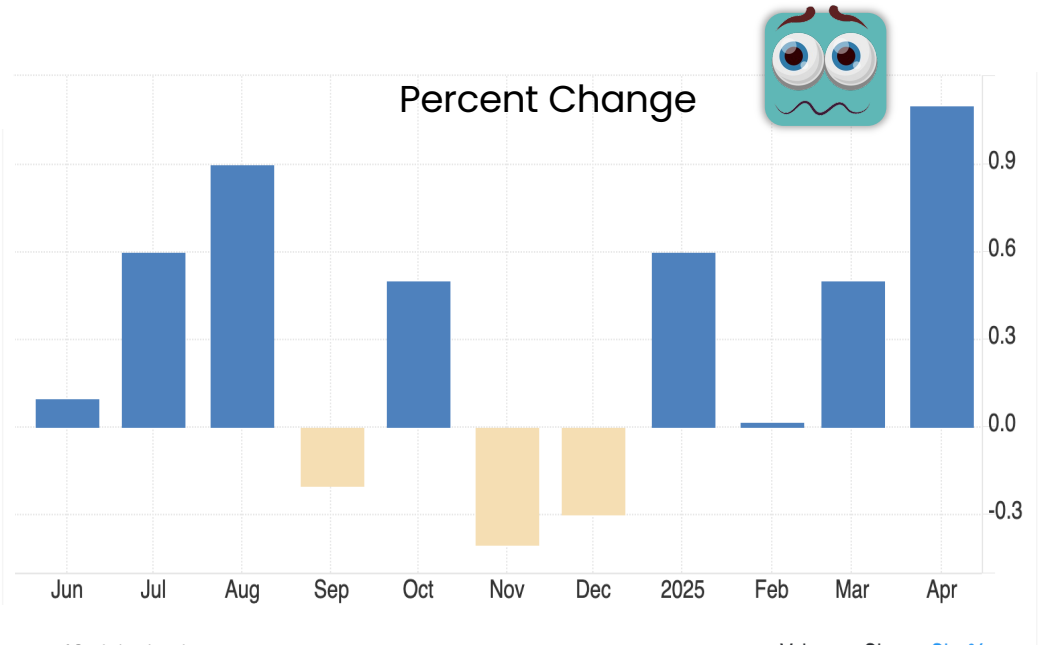
Consumer Price Index (CPI)

CPI increased to 103.20 points in April from 102 points in March of 2025. CPI averaged 35.80 points from 1951 until 2025, reaching an all time high of 103.10 points in April of 2025





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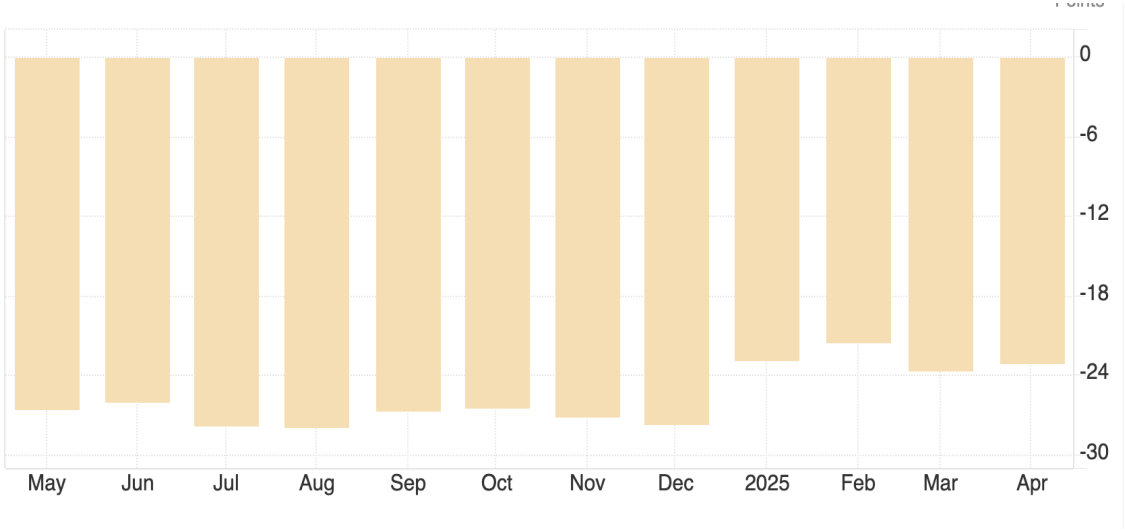
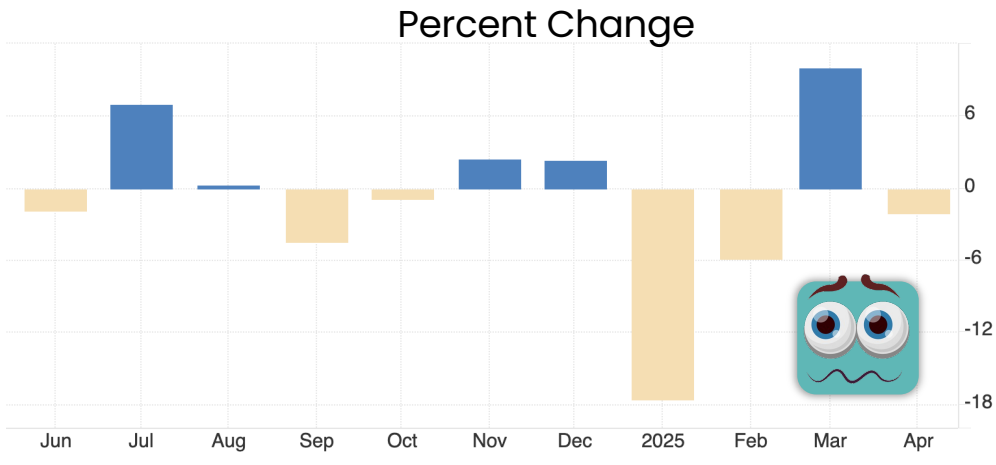
Consumer Confidence

Consumer Confidence increased to -23.10 points in April from -23.60 points in March of 2025.





How we check “our” economic forecasts

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

(Both monthly data sets)

bank hapoalim
Monthly Data

Hot Weather

CAUSATION

CAUSATION

Ice Cream Sales

IT Market

CORRELATION

Sunburn

IT Company Budgets

Business Tendency Survey

(Monthly data set)

Reichman University

The Melnick Index
(Monthly data set)

The Melnick State of the Israeli Economy Index

February index components:

Industrial production index:

- Increased by 1.9% in February, after a decrease of 4.0% in January.

Revenue in the economic branches:

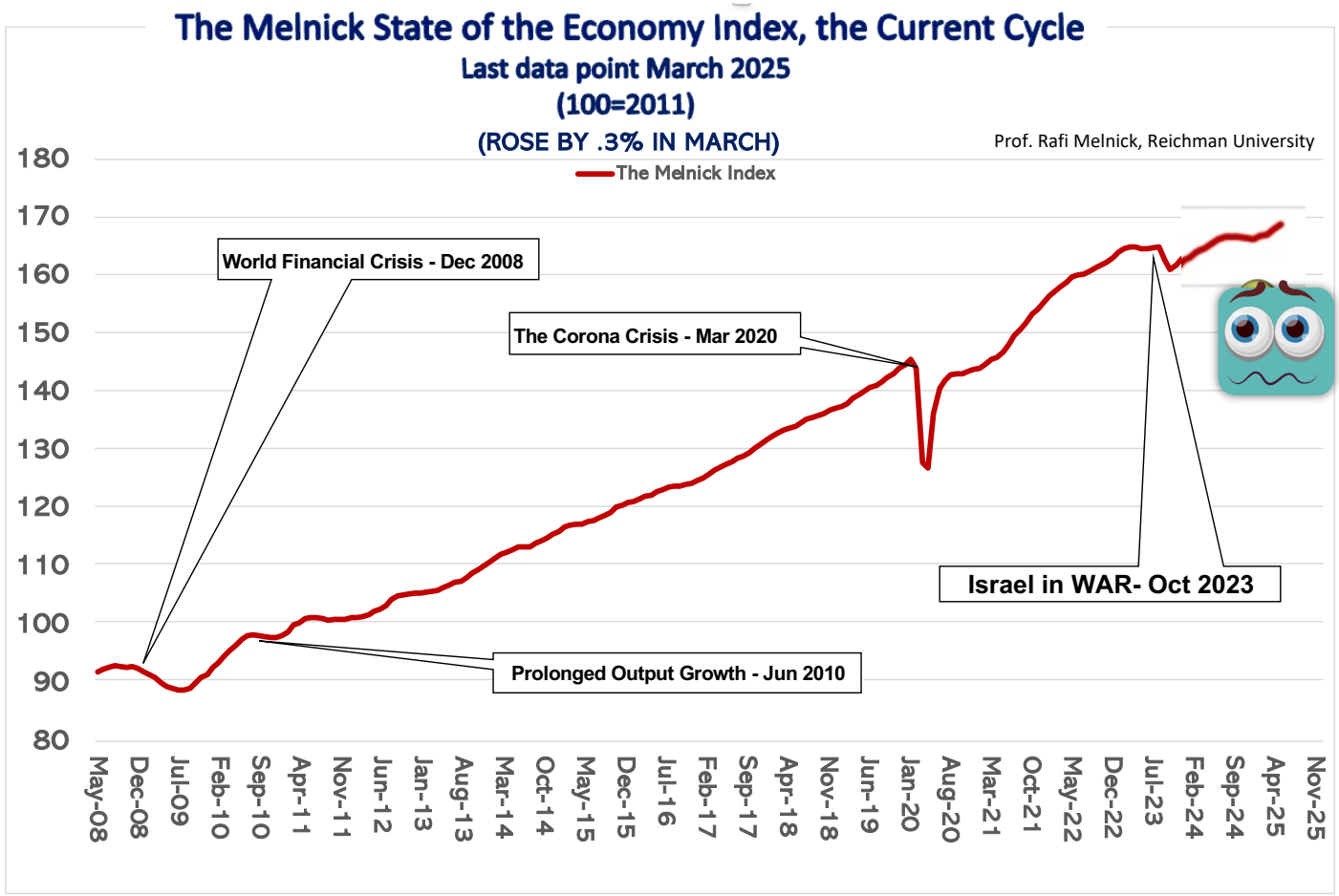
- increased by 3.1% in February, after a decrease of 7.8% in January.

Import index:

- increased by 5.3% in March, after a decrease of 3.2% in February.

Number of employee posts in the business sector:

- decreased by 0.2% in January, after a 0.8% increase in December.



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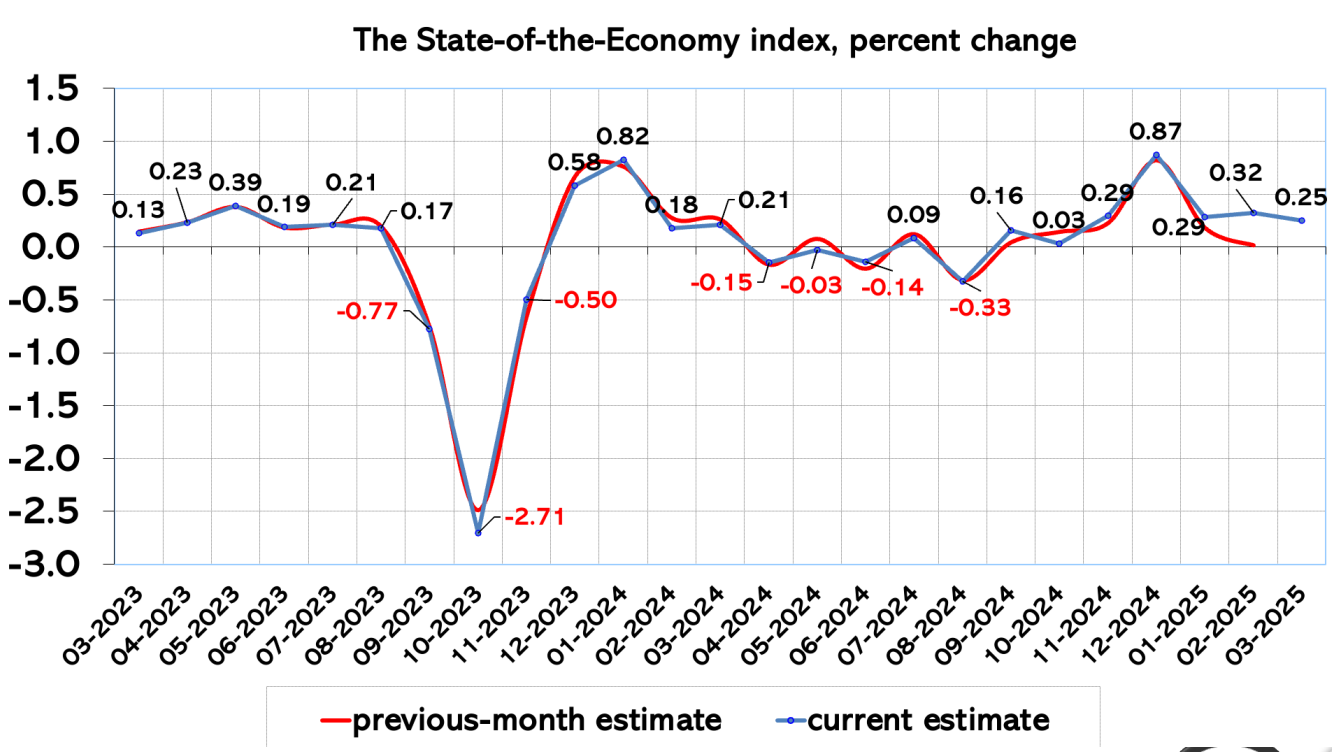
State of the Economy Index

State of the Economy Index increased 0.25 percent in March of 2025 over the same month in the previous year. Leading Economic Index in Israel averaged 0.33 percent from 1975 until 2025, reaching an all time record low of -2.66 percent in October of 2023. Probability of a slowdown is close to 95%.

The Composite State of the Economy Index

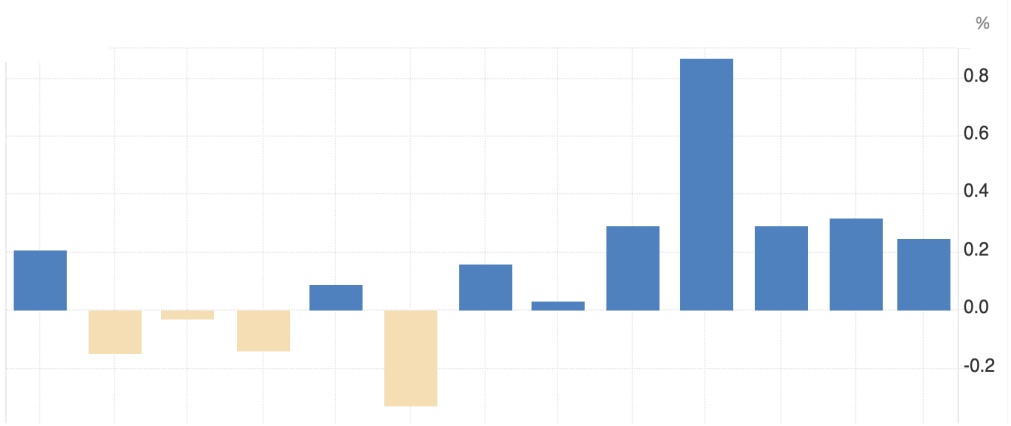
is a synthetic indicator for examining the *direction of the development of real economic activity, in real time*



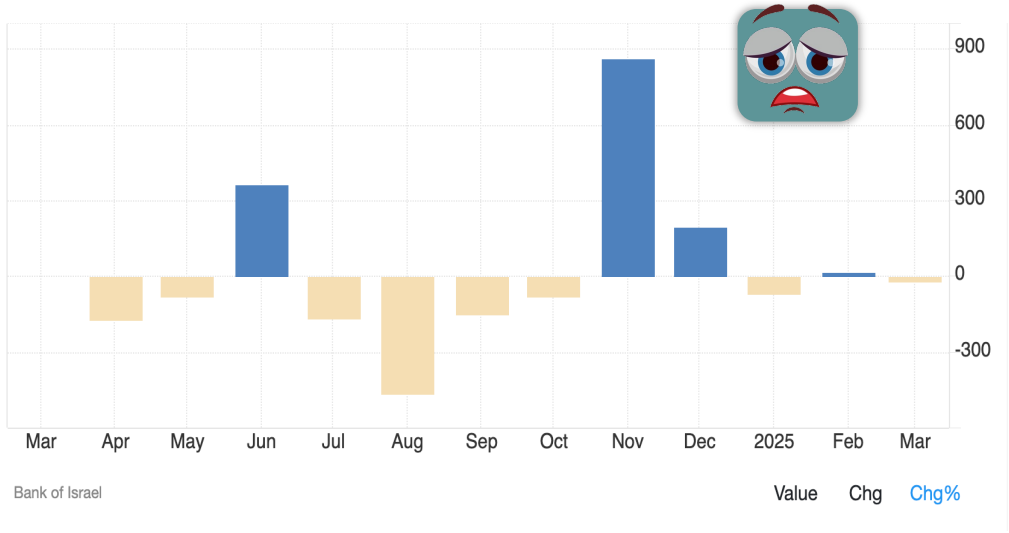
V2

State of the Economy Index

Compo site Index increased 0.25 percent in March of 2025 over the same month in the previous year. It averaged 0.33 percent from 1975 until 2025, reaching a record low of -2.71 percent in October of 2023.



Percent Change



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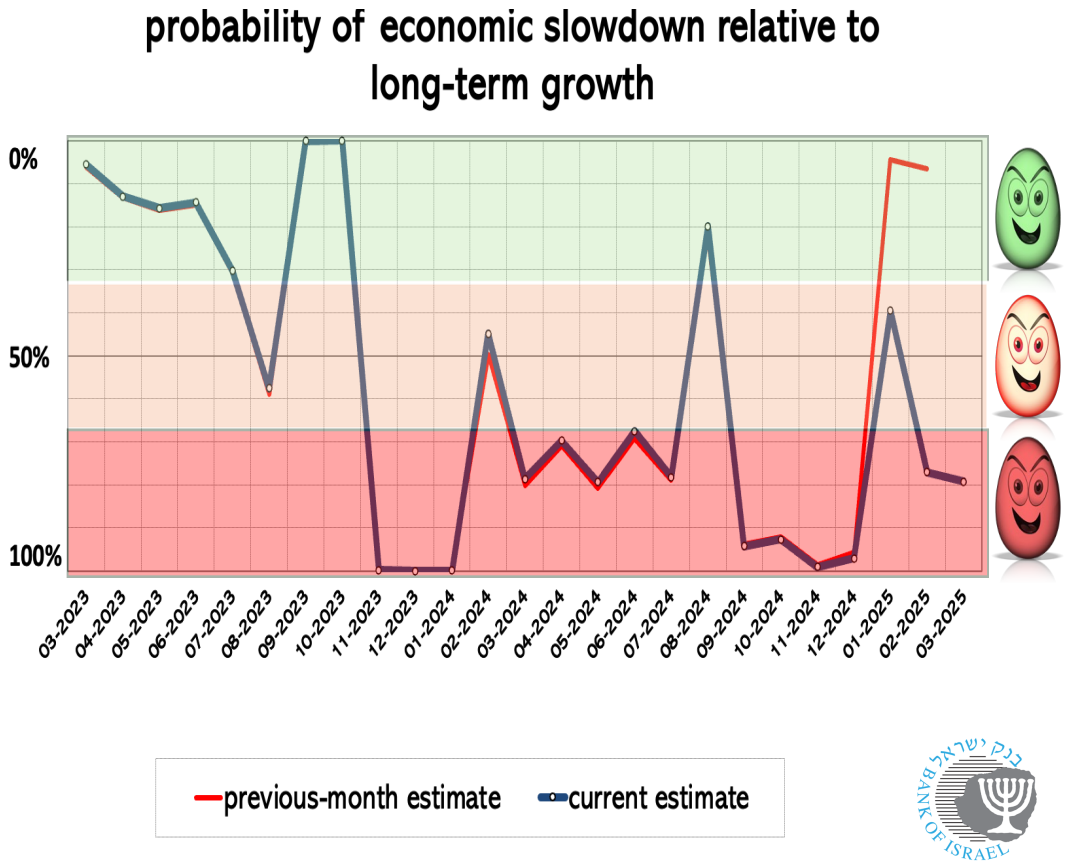
State of the Economic Index

The **Bank of Israel** in its latest forecast, projected **GDP growth of 3.5% in 2025 and 4.0% in 2026**,,but here it shows a warning that there is a **high likelihood that actual growth will fall below** these projections.

Several factors contribute to this assessment:

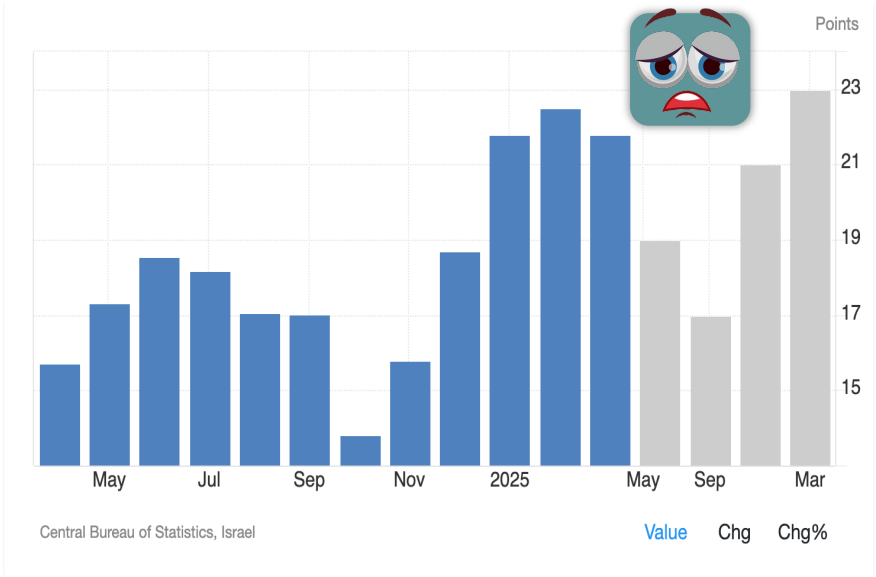
- **Global Trade Disruptions**: The recent **U.S. import tariffs** are expected to reduce Israeli exports and moderate economic expansion.
- **Geopolitical Uncertainty**: The **resumption of fighting in Gaza** could negatively impact economic activity.
- **Inflation & Interest Rates**: Inflation is forecasted at **2.6% in 2025**, and the **interest rate is expected to reach 4.0% by early 2026**, which could slow investment and consumption.

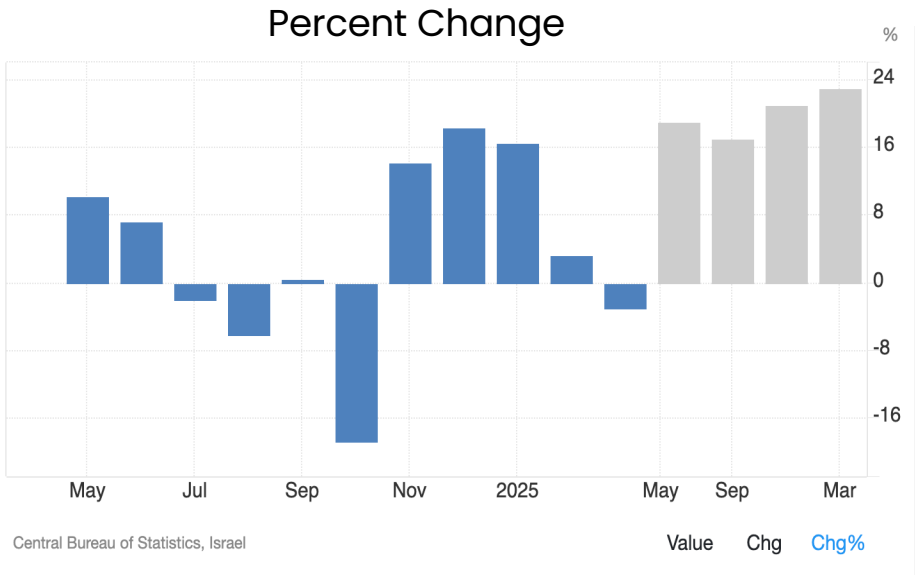
Essentially, the Bank of Israel is signaling that while growth is expected, there are **downside risks** that could lead to a slowdown compared to historical trends.



Business Confidence

Business Confidence decreased to 21.80 points in March from 22.50 points in February of 2025. Business Confidence in Israel averaged 11.43 points from 1983 until 2025, reaching an all time high of 44.60 points in August of 1991 and a record low of -39.48 points in February of 2009. It is expected to be 19.00 points by the end of this quarter





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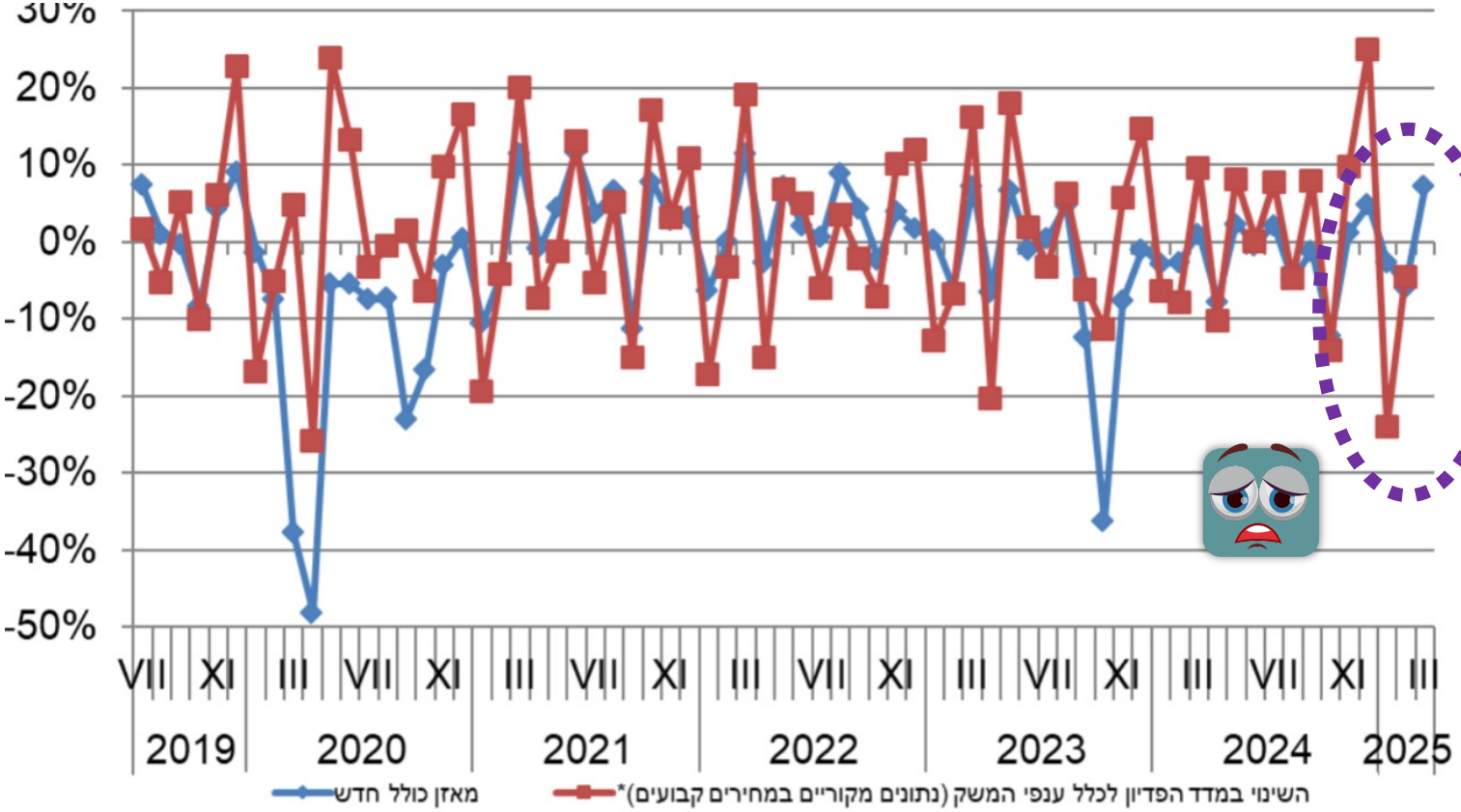
Business Tendency Survey – April 2025

סקר הערכת המגמות בעסקים – אפריל 2025

- ציפיות המנהלים בתעשייה חיוביות, אך הן ברמה נמוכה לעומת החודשים הקודמים.
- ציפיות המנהלים לפעילות כלכלית בחודש מאי הן חיוביות בכלל הענפים למעט ענף המלונאות.



BTS measures the level of optimism that executives have about current and expected developments regarding production, sales, demand, employment and changes in the USDILS exchange rate.

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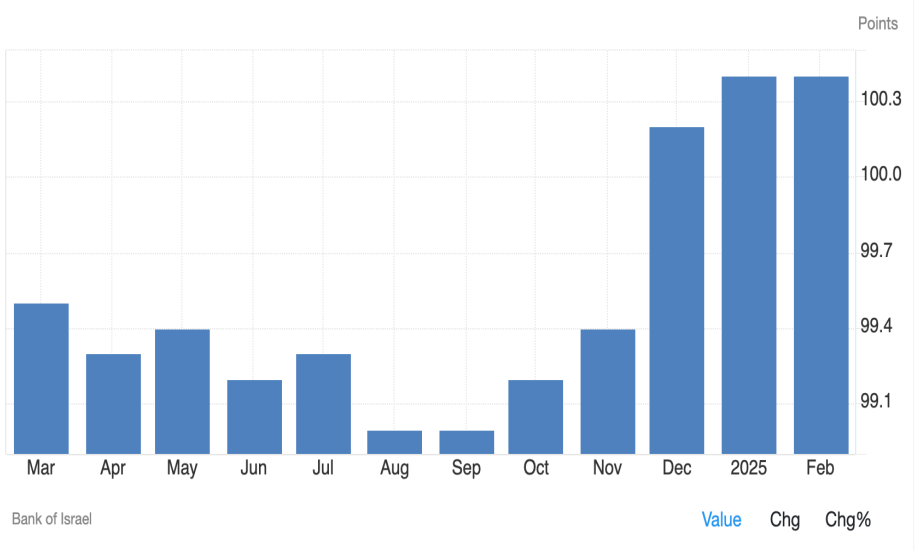
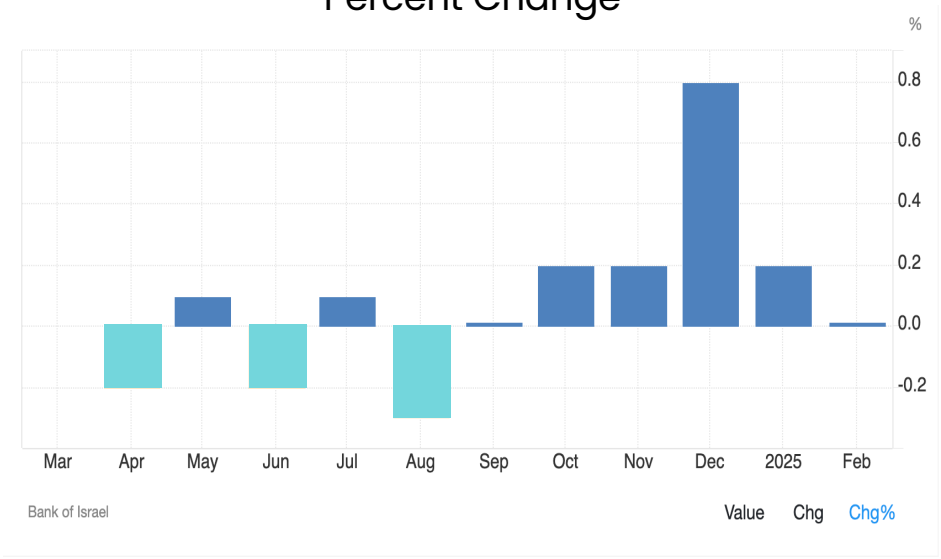
Economic Optimism Index

Economic Optimism Index remained unchanged at 100.40 points in February. Economic Optimism Index reached an all time high of 101.50 points in August of 2023.



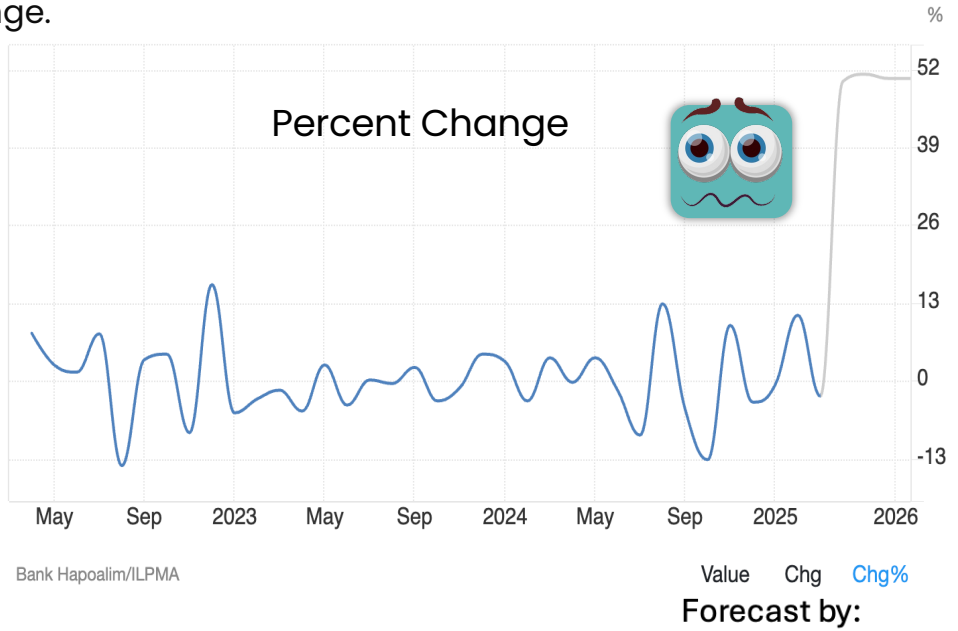
Percent Change



Israel Purchasing Managers Index

Manufacturing PMI in Israel decreased to 50.20 points in March from 51.50 points in February of 2025.

PMI measures the performance of the manufacturing sector and is based on six individual indexes: New Orders, Production, Employment, Suppliers' Delivery Time, Inventories and Prices of Raw-Materials.
A reading above 50 indicates an expansion of the manufacturing sector compared to the previous month; below 50 represents a contraction; while 50 indicates no change.



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bank hapoalim

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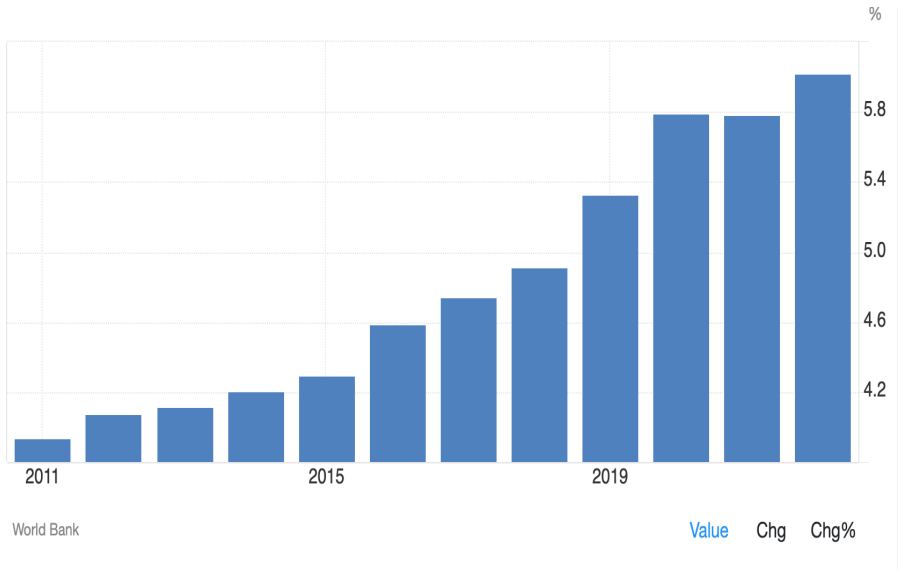
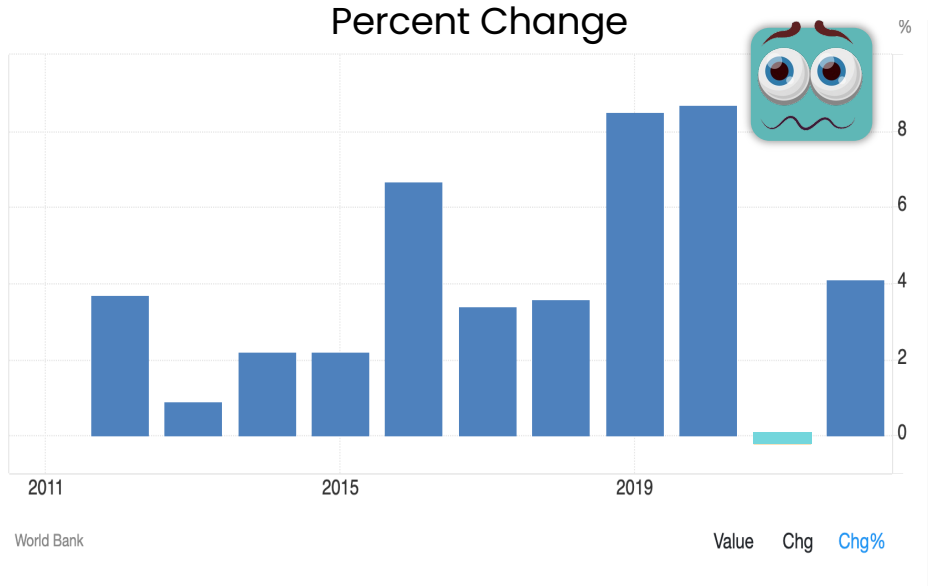
Research And Development Expenditure (% Of GDP)

Includes both capital and current expenditures in the four main sectors: Business enterprise, Government, Higher education and Private non-profit. R&D covers basic research, applied research, and experimental development. Israel record 6.3% of its GDP spent on R&D, ($28.3 billion) is over twice the OECD average of 2.7%. The private sector, which represents around 92% of investment.





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

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

Digital 2025: Israel

- A total of **10.4 million** cellular mobile connections were active in Israel in early 2025, with this figure equivalent to **110 percent** of the total population.
  - Note that some of these connections may only include services such as voice and SMS, and some may *not* include access to the internet.

- There were **8.61 million** individuals using the internet in Israel at the start of 2025, when online penetration stood at **91.1 percent**.
  - Internet users in Israel reported speeds of:
    - Median **mobile** internet download speed via cellular data networks*: **44.40 Mbps**.
    - Median **fixed** internet download speed: **217.35 Mbps**.

- Israel was home to **6.82 million** social media user identities in January 2025, equating to **72.2 percent** of the total population.
  - Advertising resources indicate the following (users in Israel in early 2025):
    - **YouTube** had **6.82 million** users
    - **Facebook** had **4.90 million** users
    - **Instagram** had **4.65 million** users
    - **TikTok** had **4.16 million** users aged **18 and above**
    - **LinkedIn** had **2.90 million** "members"

https://datareportal.com

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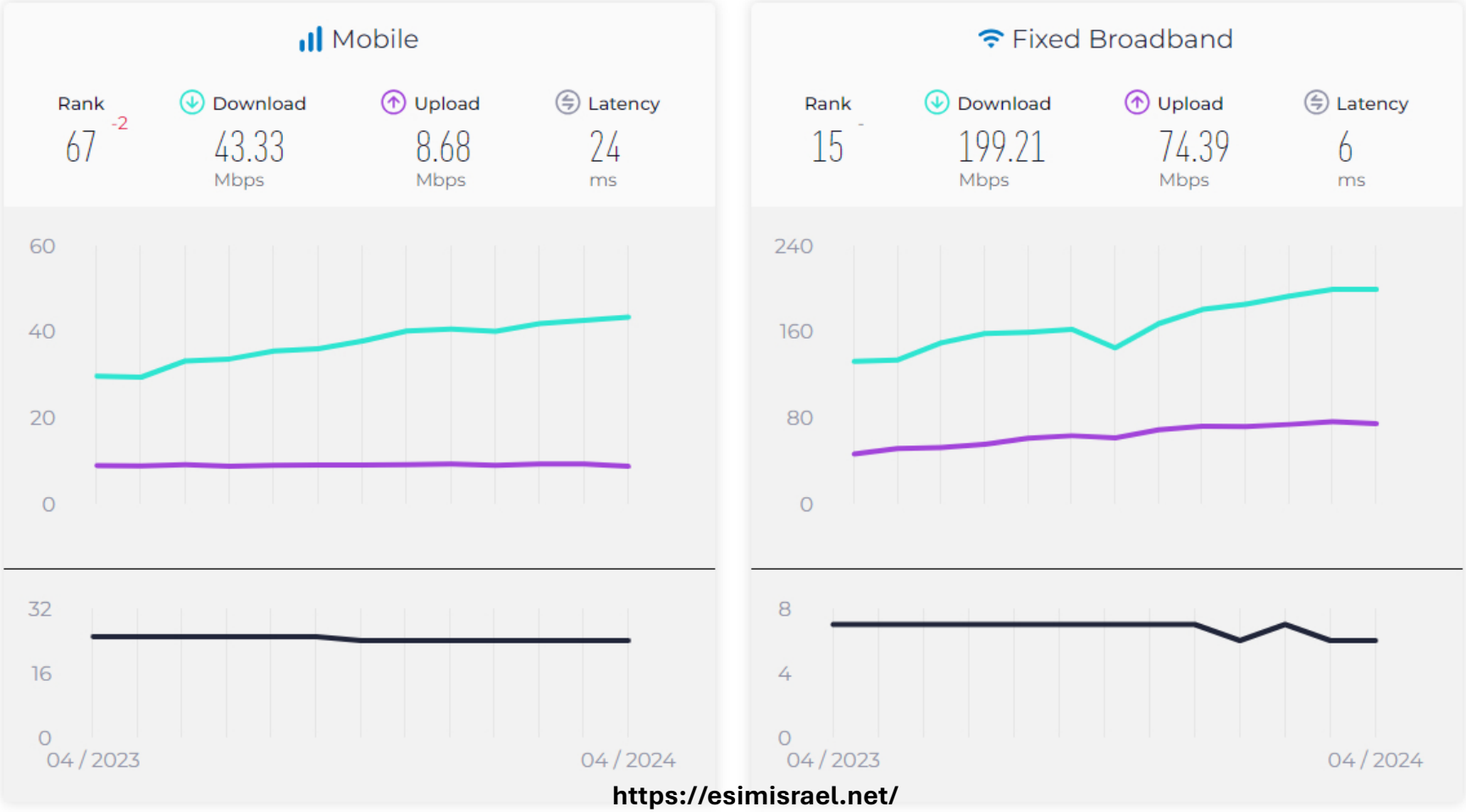
Israel Median Country Speeds 4/2024



https://esimisrael.net/

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

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

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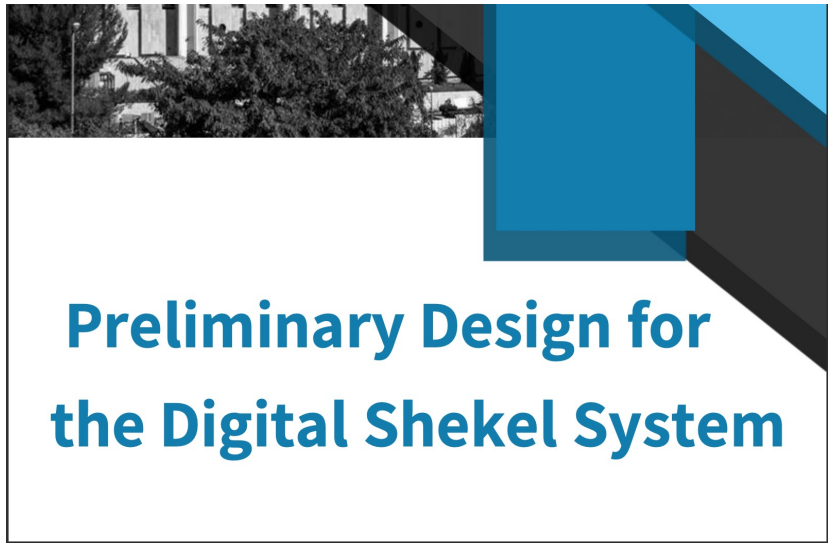
Bank of Israel Launches a Technological Assessment of the Digital Shekel Design



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

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

Economic Indicators of the High-tech Industry

The high-tech sector remained a key engine of Israel's economy in 2024, contributing NIS 285B to GDP, a 2.7% increase year over year. This growth came despite a 1.2% drop in high-tech employment. GDP per high-tech employee rose by 4% to NIS 730K, reflecting continued productivity gains.

Growth Components 2024	2024 vs. 2023 Growth Rate	
High-tech exports per employee (NIS)	726.3K	4 %
High-tech GDP per employee (NIS)*	729.9K	4 %
High-tech employment	390.8K	-1.2%
High-tech GDP per employee (Million NIS, 2015 prices)*	285.3K	2.7%
Total GDP per employee (Million NIS, 2015 prices)*.	1,622.3K.	0.9%
R&D Employees	197.9K	3.6%
Product, QA, Data	80.2K.	-5.9%
Business, Administrative	112.8K	-5.6%
High-tech employment	**390.8K.**	**-1.2%**

https://finder.startupnationcentral.org/reports/q1-2025-report

High-Tech Contribution to State Revenues

1) **In 2020, approximately 24% of all tax payments in Israel stemming from companies and salaries came from the high-tech sector.**
2) **In 2021 (the last year for which the figures were published), the salaried employees in the high-tech sector were responsible for approximately 36% of salary income tax payments.**
3) **In 2020, the total state revenues stemming directly from high-tech activity in Israel constituted about 9.2% of the state budget.**
4) **85% of state revenues stemming from the high-tech sector are related to the sector's employees. Only 15% of state revenues stemming from the high-tech sector are directly related to companies.**
5) High-tech employees are responsible for higher tax payments than the employees in the economy's other sectors. In contrast, the high-tech companies are responsible for lower tax payments than companies in other sectors of the economy. This divergence stems from several prominent reasons: a high average salary in high-tech that leads to high income tax payments by employees. With regard to the companies, startups generally lack profits on which to pay corporate tax, whereas most of the profitable companies in the sector benefit from reduced levels of taxation as part of the Encouragement of Capital Investments Law.
6) High-tech employees' tax payments increased by 66% between 2016-2021.
7) 57% of the tax payments in 2021 stemmed from the sector's dominant group of employees – (non-Haredi) Jewish men who work in central Israel and in Tel Aviv. This figure stems from the low participation in high-tech of the rest of the population.

https://innovationisrael.org.il/en/digital-reports/

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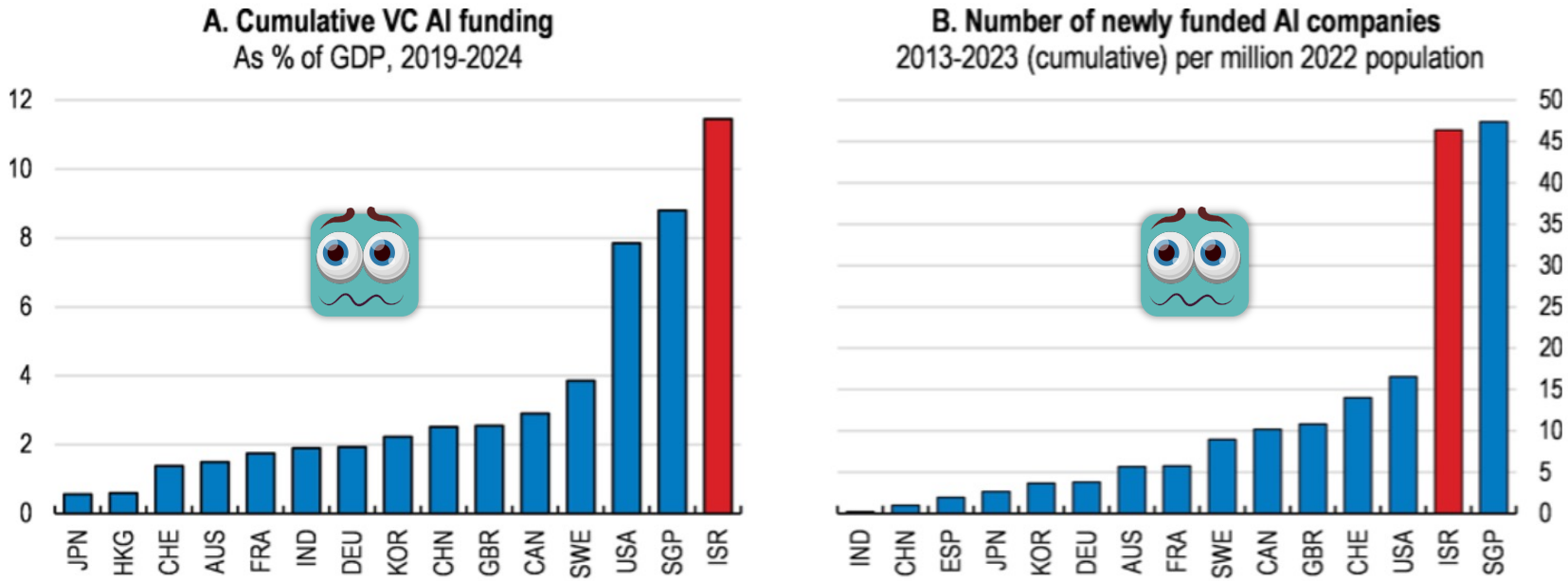
AI creation activity is buoyant



Note: The investment data refers to companies, both listed and unlisted.

Sources: OECD AI Observatory; and Stanford AI Index Report 2024.

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Israel

Trends 2025-2029

Dr. Jimmy Schwarzkopf

Galit Fein

Einat Shimoni

Pini Cohen

Reut Shefer Bar

GenAI Analyst

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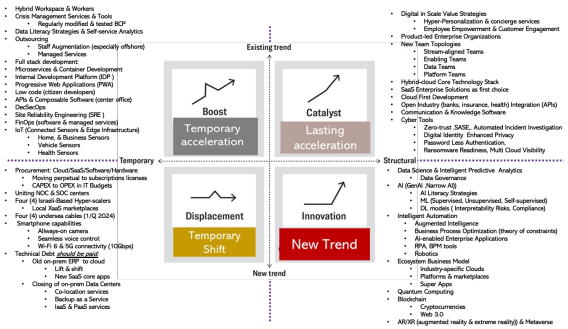
new developments (supermarket list) 2025 - 2027



Data Centers:

- AI-Driven Demand
- Increased Power Density
- Liquid Cooling
- Edge Data Center Growth
- Modular Data Centers
- Increased Automation

Enterprise Applications:

- Deeper integration of AI and agentic AI
- Continued rise of low-code/no-code development
- More sophisticated approaches to incorporated data and analytics
- Enhanced connectivity with IoT and AI agents
- Evolving cloud strategies
- Increasingly robust cybersecurity measures.

Cloud Computing:

- AI and ML Integration
- Serverless Computing Evolution
- Hybrid and Multi-Cloud Dominance
- Edge-Cloud Convergence
- Real-Time Cloud Infrastructure
- Enhanced Cloud Security
- Industry-Specific Cloud Solutions

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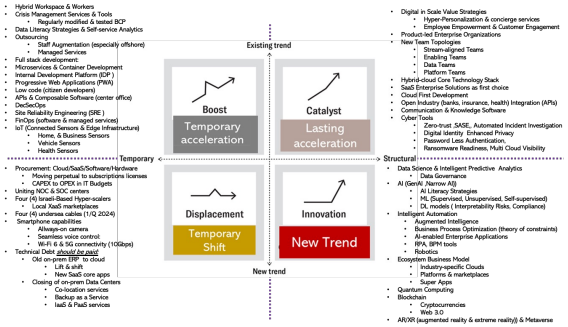
new developments(2)(supermarket list) 2025 - 2027



Data Governance:

- AI-Driven Governance
- Federated Governance Models
- Autonomous Governance
- Data Sovereignty by Design
- Real-Time Governance
- Data Literacy Programs
- Integration with Security

Data Management:

- Decentralized Data Ownership and Federated Governance
- Enterprise Data Marketplaces
- AI-Powered Data Management
- "Zero-Copy" Architectures
- Composable Data Stacks: lock-in
- Real-Time Data Processing
- Data Monetization

Data Privacy:

- Evolving Global Regulations
- Universal Opt-Out Mechanisms
- Data Minimization
- Cross-Border Data Transfers
- Children's Privacy

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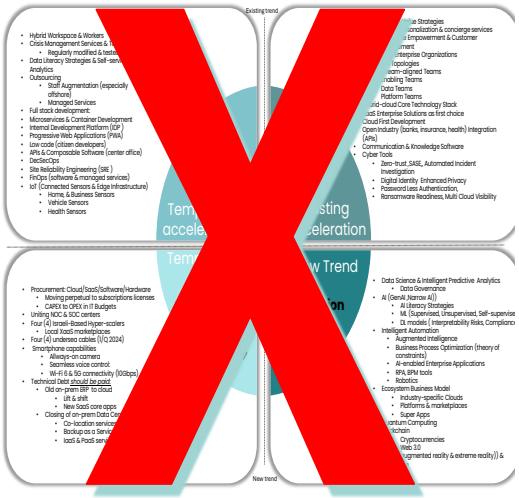
why a supermarket list of new technologies is not relevant when a CREATIVE DESTRUCTION TECHNOLOGY (AI) arrives



Meta-Technology Role:

- AI acts as a meta-technology that integrates, optimizes, and even replaces various individual IT components—ranging from databases and middleware to networking—making a discrete list of legacy technologies less relevant.

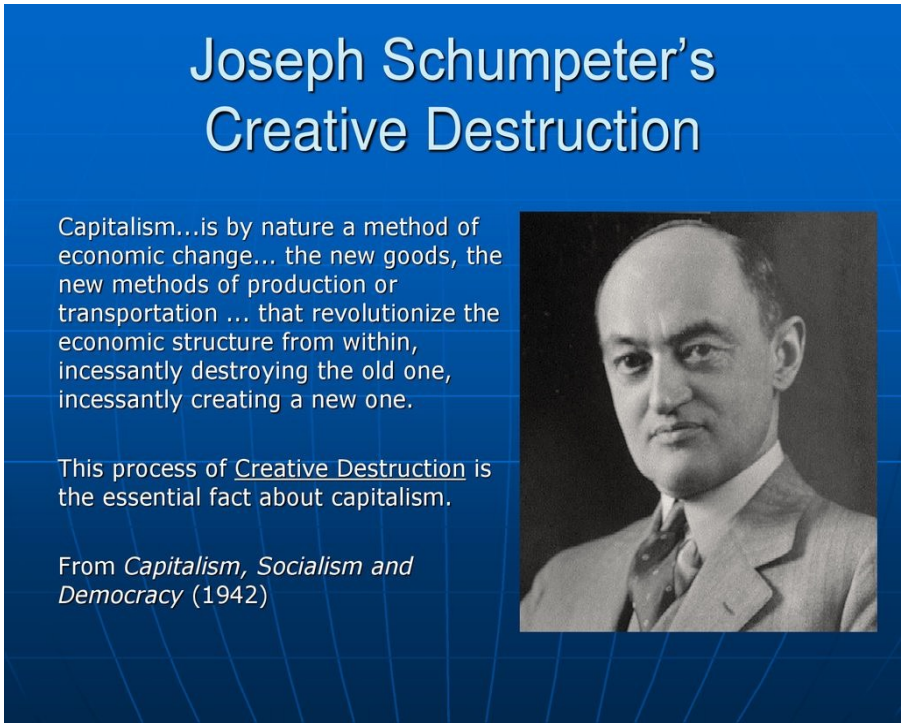
Unified and Adaptive Functionality:

- Rather than relying on separate, isolated systems maintained on static technology lists, AI offers a unified approach that adapts to changing demands through automation, pattern recognition, and intelligent decision-making.

Shifting Strategies and Priorities:

- The exponential growth and evolving nature of AI quickly outpaces traditional IT systems. **A new breed of organizations is *fundamentally reimagining what's possible with AI. They're not just automating task,they're creating self-operating businesses* that scale effortlessly, adapt continuously, and never sleep**. Which further diminishes the relevance of traditional IT technology lists

What is Creative Destruction



Creative destruction refers to the **significant changes** brought about by certain new technologies:

- It **involves industrial shifts** that eliminate outdated business models, simultaneously introducing improved options.
- By **altering the foundation of established technologies**, it disrupts existing economic frameworks, impacting industries, companies, and employment.
- This relentless phenomenon **transforms sectors**, facilitating innovation and advancement.

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Creative Destruction &Technological Transformations

Computers – The Foundation of Digital Processing

Definition: Computers revolutionized data processing, enabling automation, complex calculations, and digital storage.

Transformation:

- Shift from mechanical calculators to electronic computing (mid-20th century).
- Development of personal computers (PCs) in the 1980s, making computing accessible to individuals.
- Increasing computational power, leading to advanced software and digital applications.

Internet – The Global Information Network

Definition: The internet connects computers worldwide, enabling instant communication, information sharing, and digital commerce.

Transformation:

- Emerged from ARPANET (1960s) and became publicly accessible in the 1990s.
- Enabled email, websites, e-commerce, and cloud computing.
- Shifted industries toward digital services, remote work, and global connectivity.

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Creative Destruction &Technological Transformations 2

Smartphones – The Mobile Computing Revolution

Definition: Smartphones integrate computing, communication, and multimedia into a portable device, transforming daily life.

Transformation:

- Evolution from basic mobile phones to internet-enabled smartphones (2000s).
- Introduction of app ecosystems, superAPPs, social media, and mobile commerce.
- Enabled ubiquitous connectivity, real-time data access, and AI-powered applications.

Artificial Intelligence (AI) – The Cognitive Automation Era

Definition: AI enables machines to simulate human intelligence, automate, have problem-solving abilities,, comprehend complex instructions, autonomous decision-making and executing actions.

Transformation:

- Early AI focused on rule-based systems; modern AI scales from more compute to more thinking : LRMs (large Reasoning Models), LLMs, agentic AI and LAMs (large action models)
- Death of search engines: generative AI reshapes how people find information,
- Ongoing advancements in machine learning, deep learning, generative AI, intelligent automation, robotics, and autonomous systems based on multi-agent systems

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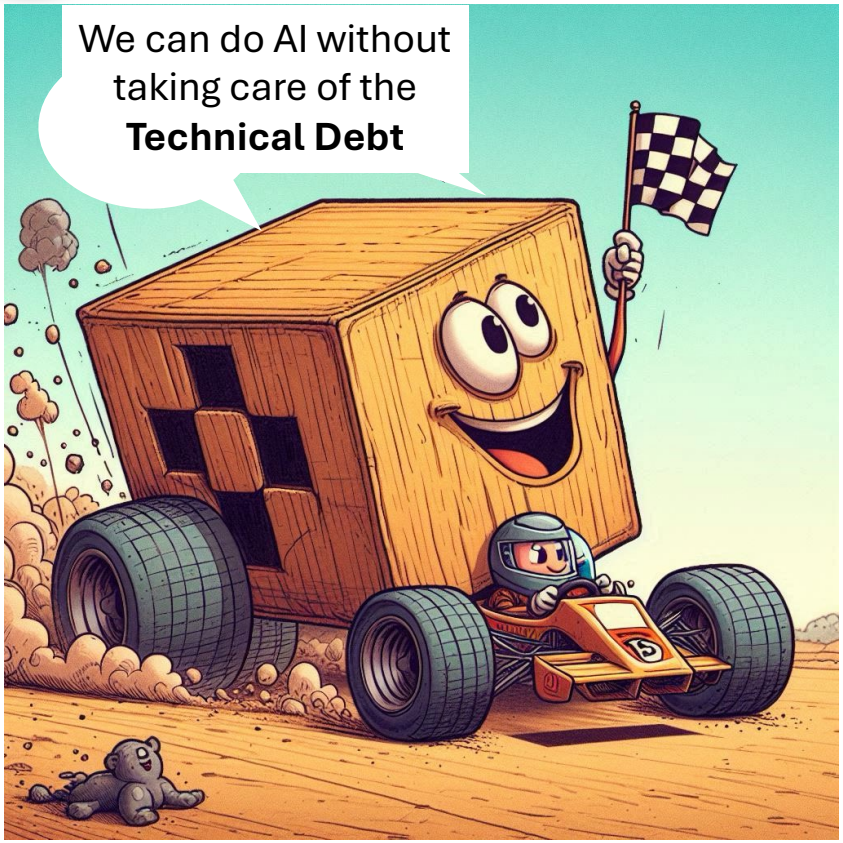
Should I deal with Technical Debt now??



- In the process of **creative destruction**, **old technologies and outdated processes inevitably lose relevance** as innovation reshapes industries.
- As new, more efficient solutions emerge, **legacy systems become obsolete**, unable to compete with the speed, adaptability, and cost-effectiveness of modern advancements.
- **Businesses that cling to outdated methods risk falling behind**, while those that embrace change drive progress and redefine the market landscape.

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Is AI going to reduce or increase technical debt?

- Companies should set aside around 15% of their IT budgets for tech debt remediation.
- Zero tech debt is not the goal: technical debt solutions are not about eliminating it but managing it
- Know good tech debt from bad: The key lies in knowing what the debt is, what to fix and what to keep,
- Tech debt is no longer an IT-only issue; it's a strategic challenge
- AI creates new forms of tech debt, especially when companies rush to deploy AI solutions without fully integrating them into existing infrastructure
- Managing tech debt effectively with continuous management reframes tech debt remediation with AI solutions as an investment in innovation capacity.
- AI can help manage technical debt by automating code analysis, improving test coverage, and optimizing workflows.

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Projects we should prioritize in 2025-26

Upskill in AI/ML:

- Understand AI frameworks and keep up with new developments in generative AI and Agentic AI.

Integrate AI into Workflows:

- Identify repetitive or data-intensive tasks that can be automated or optimized through AI and Agentic AI

Revamp Data Management:

- Ensure data is clean, well-organized, and accessible, as AI systems rely on high-quality data
- Develop robust data pipelines that can feed real-time insights for AI models.

Adopt Cloud-Based AI Solutions:

- Partner with cloud platforms that offer integrated AI services, making deployment and scalability easier.

Focus on Cybersecurity and Ethics:

- Understand the ethical implications and security challenges unique to AI applications.
- Establish best practices for responsible AI implementation to safeguard data and maintain compliance.

Increase AI adoption

- Nothing about measuring employee AI adoption is easy, because sometimes people don't realize how much AI they've been passively using.
- The more AI becomes pervasive in the workplace (from agents automatically setting up workflows to subtle reminders from your email provider to reply to someone) the less obvious it is to employees and customers that they're already interacting with the technology.

V2

Agentic AI is here.
Maybe not right now but…

While talking to vendors

(vendor briefings that were an important part of this study)

every VENDOR told us they have agentic AI solutions.

We've found no industry consensus on what truly defines an "agent."

Main differences between GenAI and Agentic AI systems

Characteristics	GenAI	Agentic AI
Core Capability	Generating text, images, code, or music based on learned patterns	Planning, decision-making, multi-step execution without human intervention
Memory & Context	Limited memory (short-term context retention, no persistent memory)	Persistent memory (remembers past interactions, adjusts plans accordingly)
Autonomy Level	Requires human prompts to generate responses	Operates with minimal human input, executing complex workflows
Integration with External Systems	Minimal integration (relies on APIs or tools for external functions)	Deep integration (connects with APIs, databases, physical systems)
Learning Ability	learns only through retraining by developers.	Evolves - learns from interactions and refines behavior.
Typical Use Cases	Content creation, summarization, coding assistance, brainstorming	Workflow automation, personal assistants, business operations

Agentic Artificial Intelligence: Harnessing AI Agents to Reinvent Business, Work and Life ; Bornet,, Wirtz,etal.

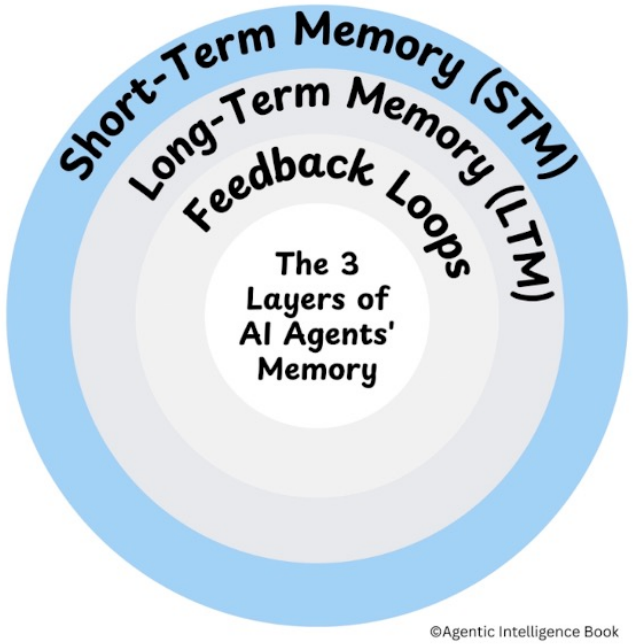
2025: Agentic AI and memory

Many people are scared to interact with Large LLMs because they believe these AI systems are constantly learning and remembering everything from their interactions, building an ever-growing knowledge base.
The reality is far more surprising: LLMs are extremely sophisticated echo chambers with limited temporary memory.

Future AI Agents are getting memory

This memory can be structured into three interconnected layers, that function in preserving context, facilitating learning, and enabling adaptation over time.
Agentic AI memory functions dynamically across these three layers: STM holds immediate context, LTM ensures continuity beyond a session, and feedback loops refine both to drive continuous learning. This layered approach allows AI agents to engage in context-aware, evolving, and personalized interactions, making them more intelligent and reliable over time.

The Three Layers of Agentic AI Memory

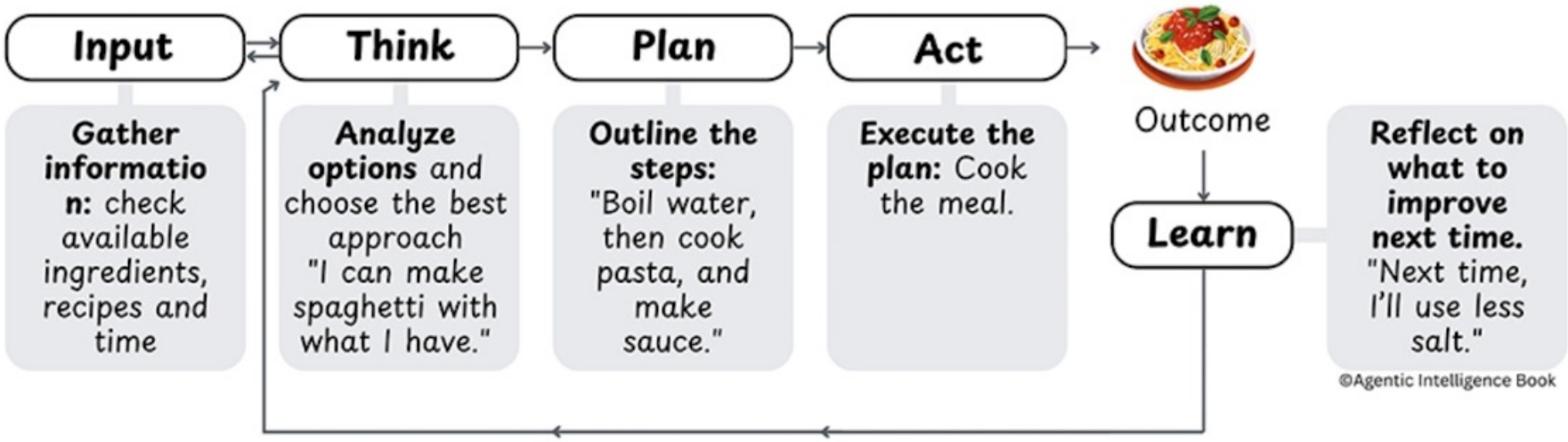


(Source: © Bornet et al.)

V2

SPAR Framework and how humans achieve goals

1. We start by deciding what needs to be done. 2. Next, we gather input.
3. Then, we think through our options, choosing the best approach.
4. Once decided, we plan the steps 5. With a clear plan, we take action.
6. Afterward, we evaluate the result, learn from the experience, 7.Finally, adjust for the future creating a continuous feedback loop for improvement.

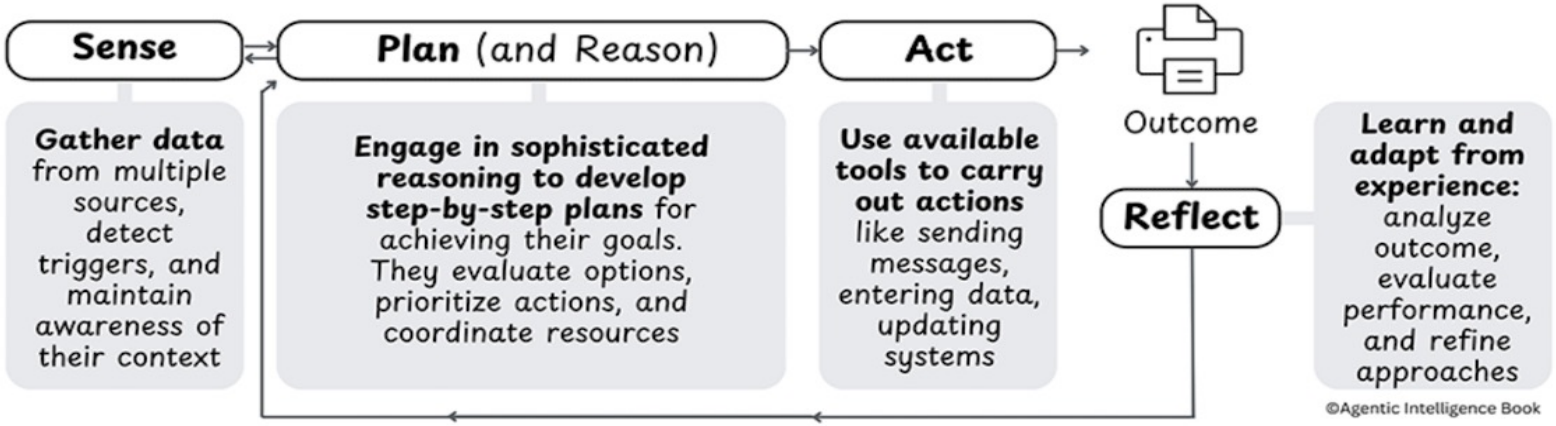


Agentic Artificial Intelligence: Harnessing AI Agents to Reinvent Business, Work and Life ; Bornet,, Wirtz,etal.

How an AI Agent takes action: SPAR Framework

What makes AI agents so powerful is how these four capabilities (sense,plan,act,reflect) work together in a continuous cycle.

Each capability feeds into and enhances the others, creating a unified system that can pursue complex goals with increasing sophistication. This integrated approach represents a fundamental shift from traditional automation. Rather than following rigid, predetermined instructions, **AI agents actively engage with their environments, make decisions, take actions, and learn from outcomes**.



Agentic Artificial Intelligence: Harnessing AI Agents to Reinvent Business, Work and Life ; Bornet,, Wirtz,etal.

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The Agentic AI Progression Framework

The market for AI agents is growing rapidly, with vendors offering solutions across a spectrum of capabilities. This proliferation creates a challenge: How do we make sense of these different systems?

While we often talk about them as fully autonomous systems, in reality, we're dealing with varying levels of capability and independence that progress along a clear developmental path.

The Agentic AI Progression Framework:

- At the early stages of this progression, we have AI agents that can execute specific, predefined tasks but require significant human oversight
- As we move further along the Progression Framework, we find agents that can handle more complex sequences of actions and make some independent decisions but still need human validation at critical points
- At the far end of this progression lie the highest levels, where agents can fully understand, plan, and execute complex missions with minimal human input across any domain. These remain largely theoretical

V2

AI Agents: Capability Mapping Matters

The Agentic AI Progression Framework

Level	Car Analogy	Agentic AI Analogy	Main Technology Involved	SPAR Capabilities (Sensing, Planning, Acting, Reflecting)
Level 0 - Manual Operations (Human-Only)	Manual driving with no assistance.	Humans perform all tasks without automation.	Basic digital tools (spreadsheets, email), manual processing.	NA
Level 1 - Rule-Based Automation	Basic cruise control maintains speed but needs human operation.	Simple automation follows fixed rules (e.g., data entry, RPA systems).	Basic automation tools (RPA, simple scripts, rule engines).	***Sensing:*** Predefined triggers and structured data. ***Planning:*** Simple if-then rules and decision trees. ***Acting:*** Deterministic actions based on fixed inputs. ***Reflecting:*** No true learning, only logging and error reporting.
Level 2 - Intelligent Process Automation	Advanced driver assistance systems handle speed and steering with supervision.	AI combines automation with cognitive abilities like NLP and machine learning.	AI tools (machine learning, NLP, computer vision, RPA, process orchestration).	***Sensing:*** Semi-structured data from multiple sources. ***Planning:*** Basic AI models for pattern recognition and decision-making. ***Acting:*** Sophisticated actions with error handling. ***Reflecting:*** Basic analytics and performance monitoring, no adaptive capabilities.

Agentic Artificial Intelligence: Harnessing AI Agents to Reinvent Business, Work and Life ; Bornet,, Wirtz,etal.

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AI Agents: Capability Mapping Matters 2

Level	Car Analogy	Agentic AI Analogy	Main Technology Involved	SPAR Capabilities (Sensing, Planning, Acting, Reflecting)
Level 3 - Agentic Workflows	Vehicles navigate highways but need human intervention in complex situations.	Agents generate content, plan, reason, and adapt in defined domains.	Large language models, memory systems, content generation tools, basic reinforcement learning.	***Sensing:*** Advanced natural language understanding and context awareness. ***Planning:*** Reasoning using foundation models, orchestrating complex workflows. ***Acting:*** Chaining tools and handling multi-step tasks. ***Reflecting:*** Limited short-term feedback adjustments and long term memory.
Level 4 - Semi-Autonomous Agents	Self-driving cars operate autonomously in specific conditions.	Agents work autonomously within defined expertise, adapt strategies, and learn.	Advanced reasoning and planning, real-time adaptation, causal reasoning.	***Sensing:*** Multi-modal perception and interpretation of diverse inputs. ***Planning:*** Dynamic strategies for complex tasks and goal breakdown. Acting: Autonomous tool usage and error recovery. ***Reflecting:*** Retains context across sessions, learns from past experiences.
Level 5 - Fully Autonomous Agents	Fully autonomous cars drive anywhere in all conditions.	AI systems handle any task, cross-domain learning, and self-adaptation with no human intervention.	Sophisticated memory systems, advanced learning mechanisms, safety protocols for autonomy.	***Sensing:*** Complete environmental awareness and goal formulation. ***Planning:*** Advanced reasoning and original problem-solving. ***Acting:*** Full autonomy in tool selection and execution. ***Reflecting:*** Continuous self-improvement, robust long-term memory.

Agentic Artificial Intelligence: Harnessing AI Agents to Reinvent Business, Work and Life ; Bornet,, Wirtz,etal.

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Insights & Predictions for agentic AI (2025 and 2030)

Prediction/Trend	Timeline (2025-2030)	Impact/Example
Autonomous Problem Resolution	Up to 80% of customer service issues by 2029	Increased efficiency in customer interactions
Enterprise Integration	33% of enterprise applications by 2028	Streamlining business processes with integrated AI tools
Decision-Making Automation	15% of day-to-day work decisions by 2028	Enhancing productivity through autonomous decision-making
Specialized Vertical AI Agents	Accelerating adoption in healthcare, IT, etc.	Transforming industries like diagnostics and automated IT
AI Agent Frameworks and Collaborative Roles	Ongoing development and integration	Shifting from tools to autonomous co-workers and partners

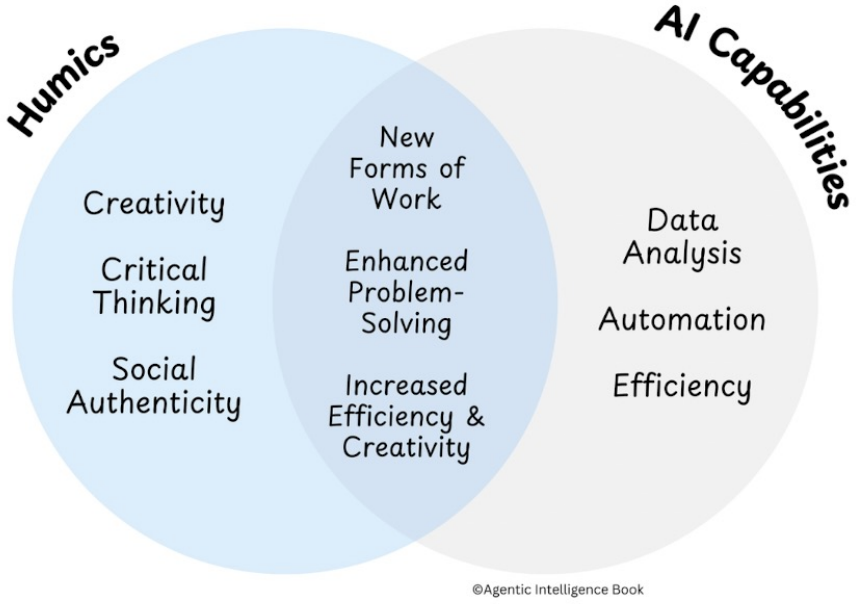
Example of next wave of innovation powered by agentic AI:

Walmart Is Preparing to Welcome Its Next Customer: The AI Shopping Agent

As consumers begin to use AI agents to do their shopping, retailers are trying to figure out how to market to bots in addition to humans

THE NEW WORLD OF WORK

The future belongs not to AI alone but to the powerful symphony of human and machine capabilities



The progression in human-agent collaboration has unfolded across distinct levels of sophistication:

- Level 1: basic rule-based automation (the kind that could handle repetitive tasks but required explicit programming)
- Level 2: brought intelligent automation, where AI could handle more complex scenarios using machine learning but still within confined parameters.
- Levels 3 (4&5): The real transformation begins with agentic workflows. These AI systems can understand context, reason with sophistication, and orchestrate complex processes. This is where the first genuine examples of human-agent collaboration exist , where AI wasn't just a tool but a partner in problem-solving.

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LLM AI (some) Future Trends

- **Dealing with Uncertainty:**
  - Patterns that handle the “fuzziness” of output, making sure that when the LLM is unsure, it asks for clarification or uses fallback strategies.
- **Memory and Context Management:**
  - Patterns that smartly maintain context so the model doesn’t lose track of important details over long conversations.
- **Multimodal Integrations:**
  - The future will likely see LLMs working hand-in-hand with images, audio, video, and sensor data; requiring patterns to adapt beyond text-centric assumptions.
  - Content filters, compliance rules, and bias metrics must all handle richer data types, while memory and orchestration strategies evolve to handle more dimensional data streams.
- **Emerging LLM Capabilities:**
  - Models are poised to scale beyond current boundaries, handle increasingly complex reasoning tasks, and tap into dynamic knowledge sources.
  - This brings forth fresh opportunities to streamline cognitive patterns, manage memory more intelligently, and integrate advanced validation or semantic checks
- **Autonomous and Self-Improving Systems:**
  - As LLMs become more agent-like (taking actions independently, updating their policies, and refining prompts without direct human intervention) patterns related to governance, oversight, adaptability, and explainability take on new urgency.

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Agentic AI (some) Future Trends

From Reactive to Proactive Behavior:

Autonomous agents, will initiate actions: checking data sources periodically, improving their own reasoning chains, or updating prompt templates without human intervention.

Self-Improvement Loops:

Future agents may incorporate continuous improvement cycles.(ie: Refine Prompts Dynamically)
The agent can identify when certain prompt styles yield better results and adjust them on the fly with no human developer required. It learns what types of instructions lead to higher accuracy or user satisfaction,

Enhance Memory and Retrieval Strategies:

Agents might experiment with different memory indexing techniques, vector search configurations, or even selection of knowledge sources, guided by observed performance metrics. This self-tuning of memory patterns ensures the system remains comprehensive as knowledge bases grow or domain topics shift.

Multi-Agent Ecosystems:

Multiple autonomous agents will collaborate. They might coordinate using orchestration patterns adapted for agents with partial autonomy. Memory and knowledge integration patterns may need to handle agent-to-agent communication. This inter-agent interplay heightens the complexity of bias mitigation and compliance checks, as policies must handle the collective behavior of multiple autonomous actors.

Surveys

Dr. Jimmy Schwarzkopf

Galit Fein

Einat Shimoni

Pini Cohen

Reut Shefer Bar

GenAI Analyst

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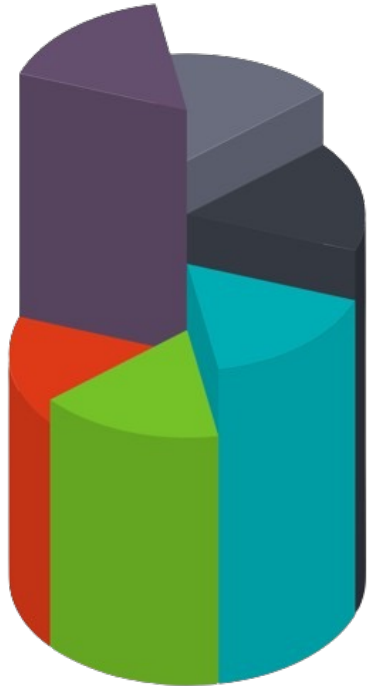
State of AI
market study in Israel 2025

State of AI in Israel
STKI 2025



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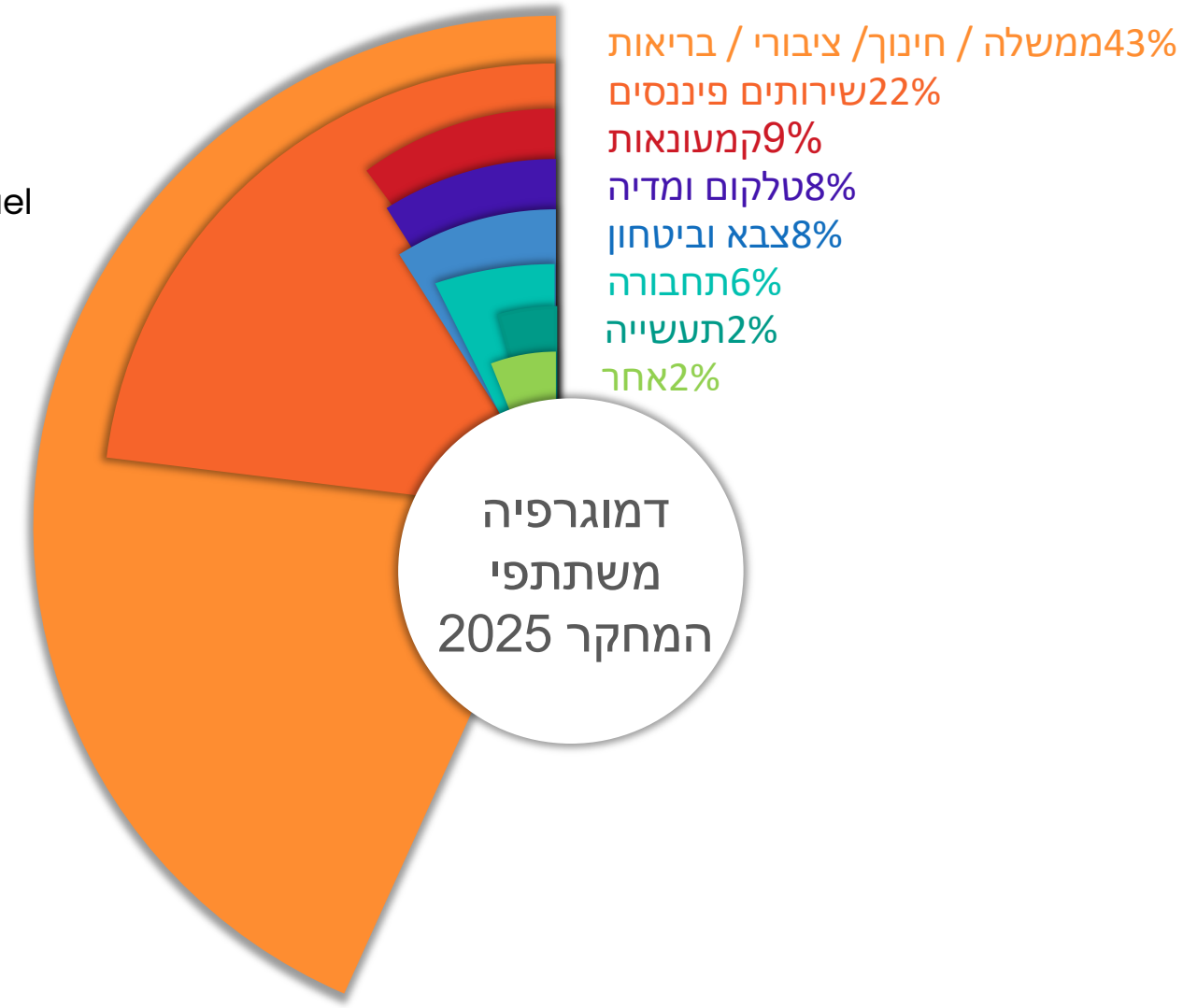
State of AI in Israel
STKI 2025



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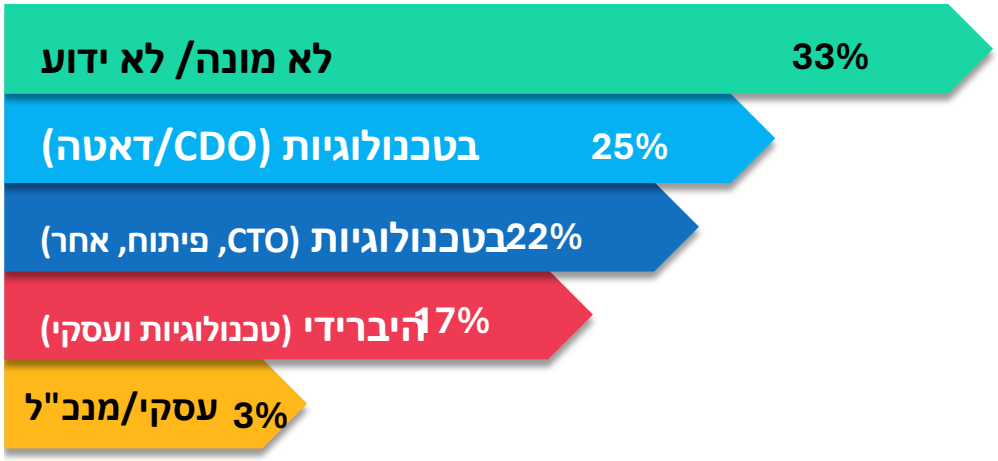
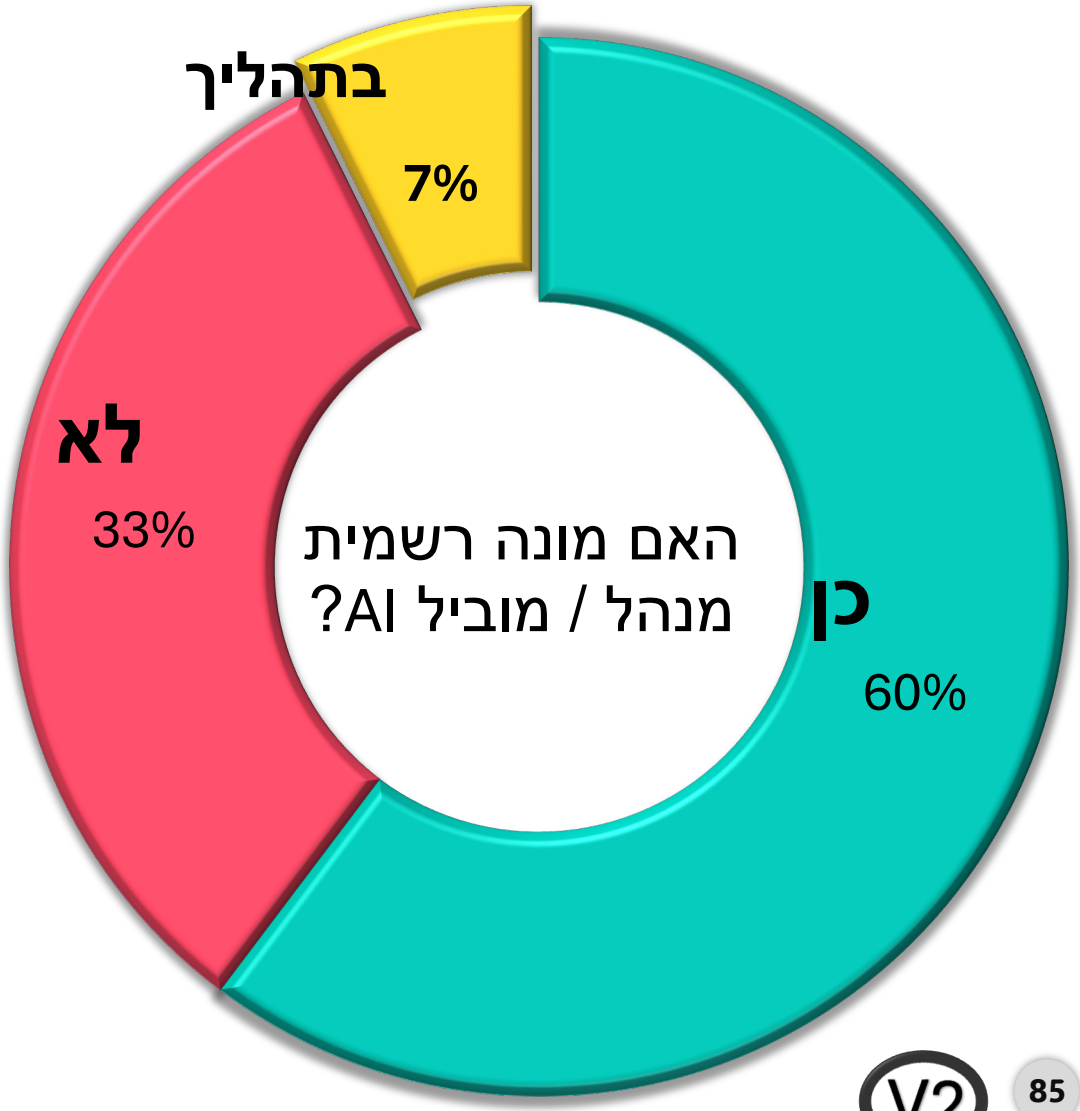
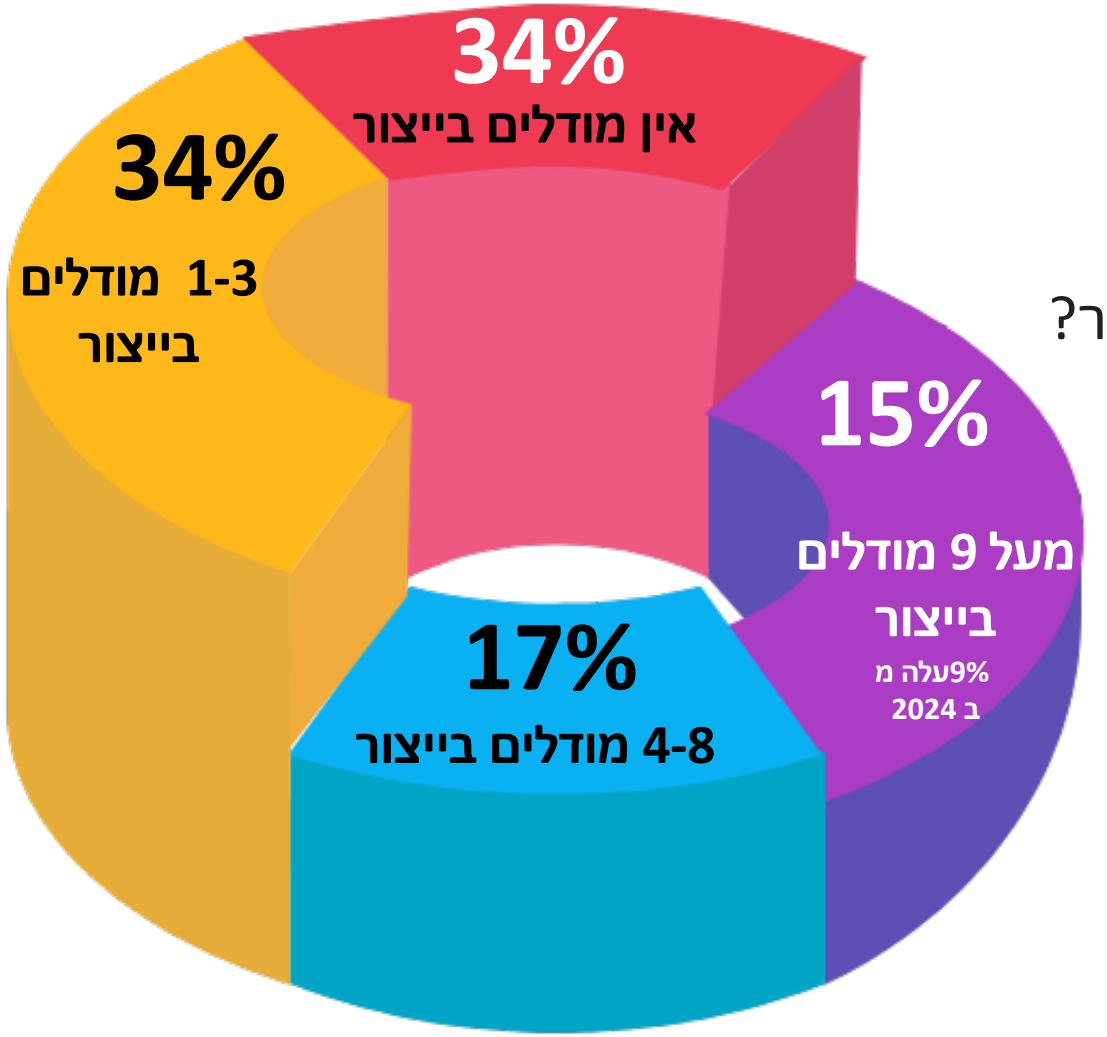
למי מדווח מנהל/ת AI?



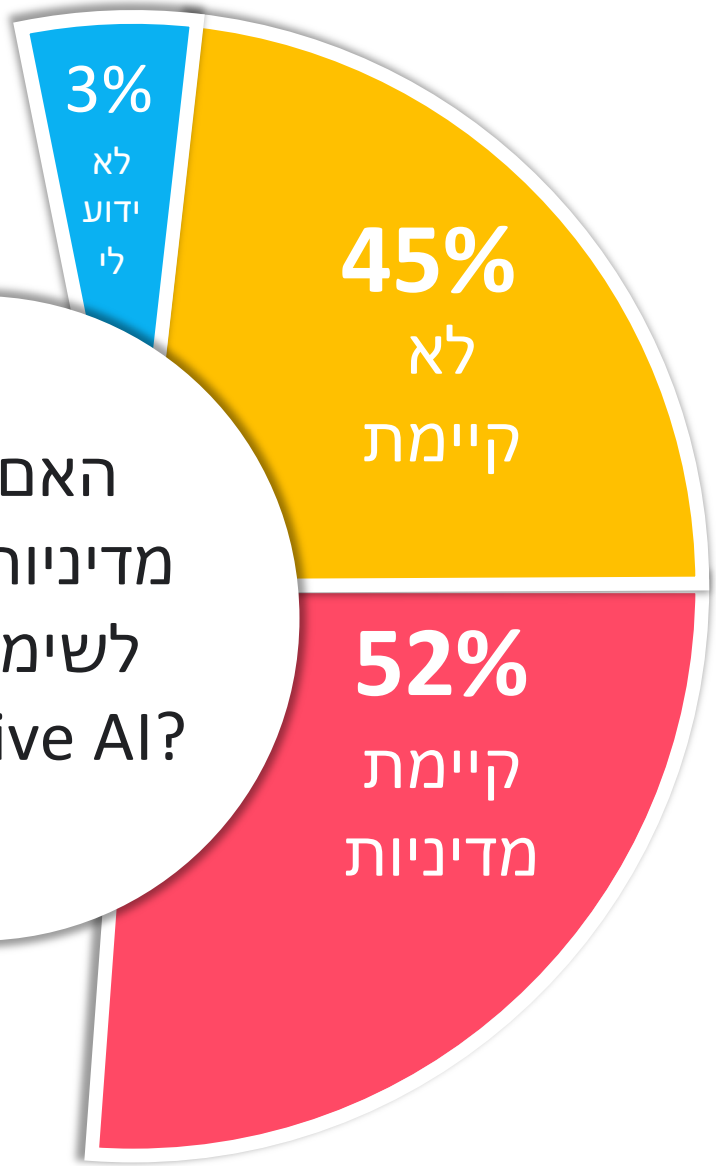




Analytical AI
במה מודלים של ML בייצור?

66% of orgs. Have Analytical AI models in production (up from 60% in 2024)

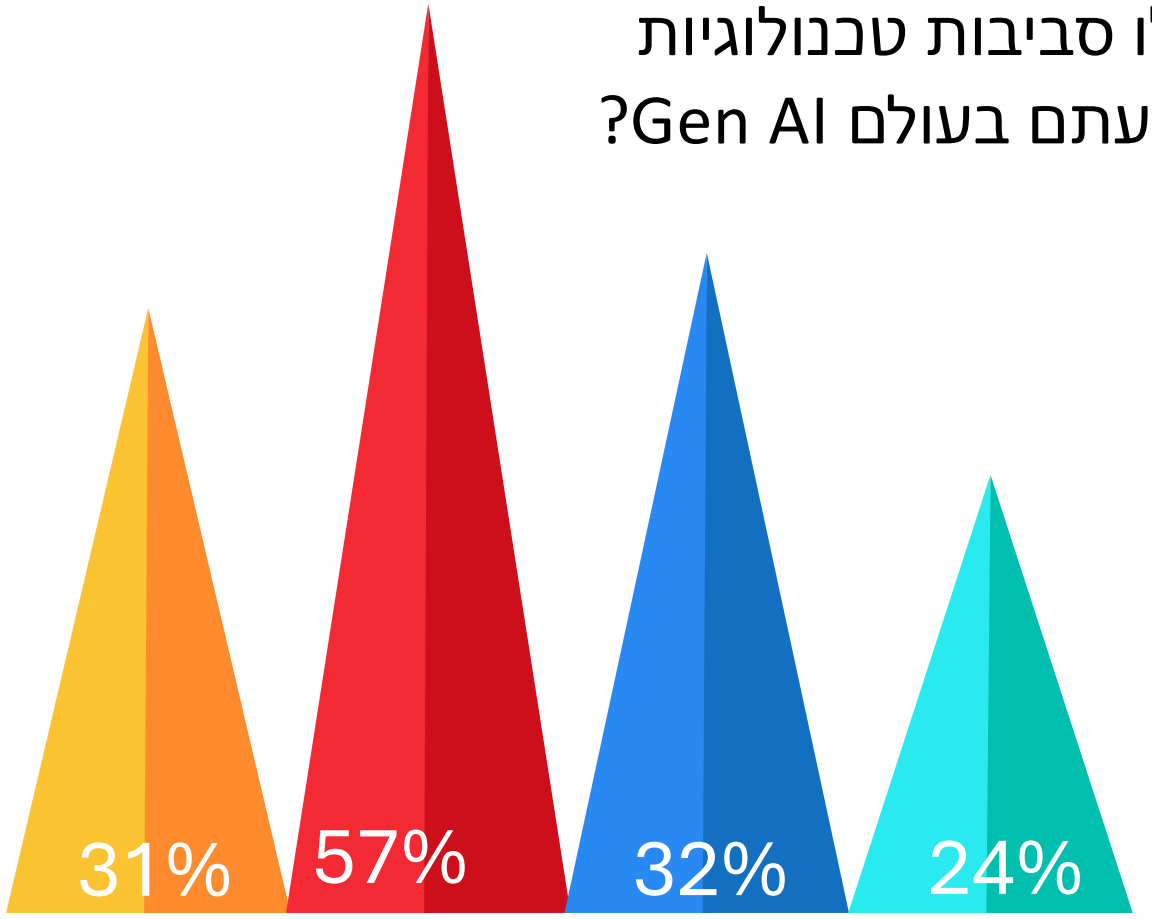
V2



האם קיימת מדיניות ארגונית לשימוש בכלי Generative AI?

V2 87

אילו סביבות טכנולוגיות הטמעתם בעולם Gen AI?



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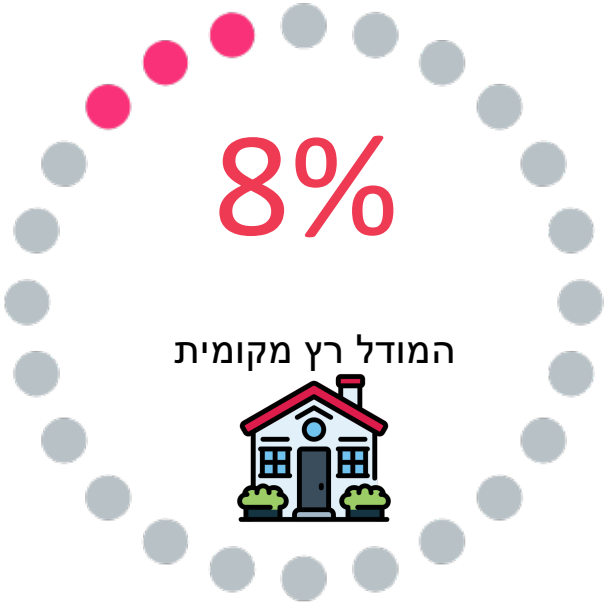
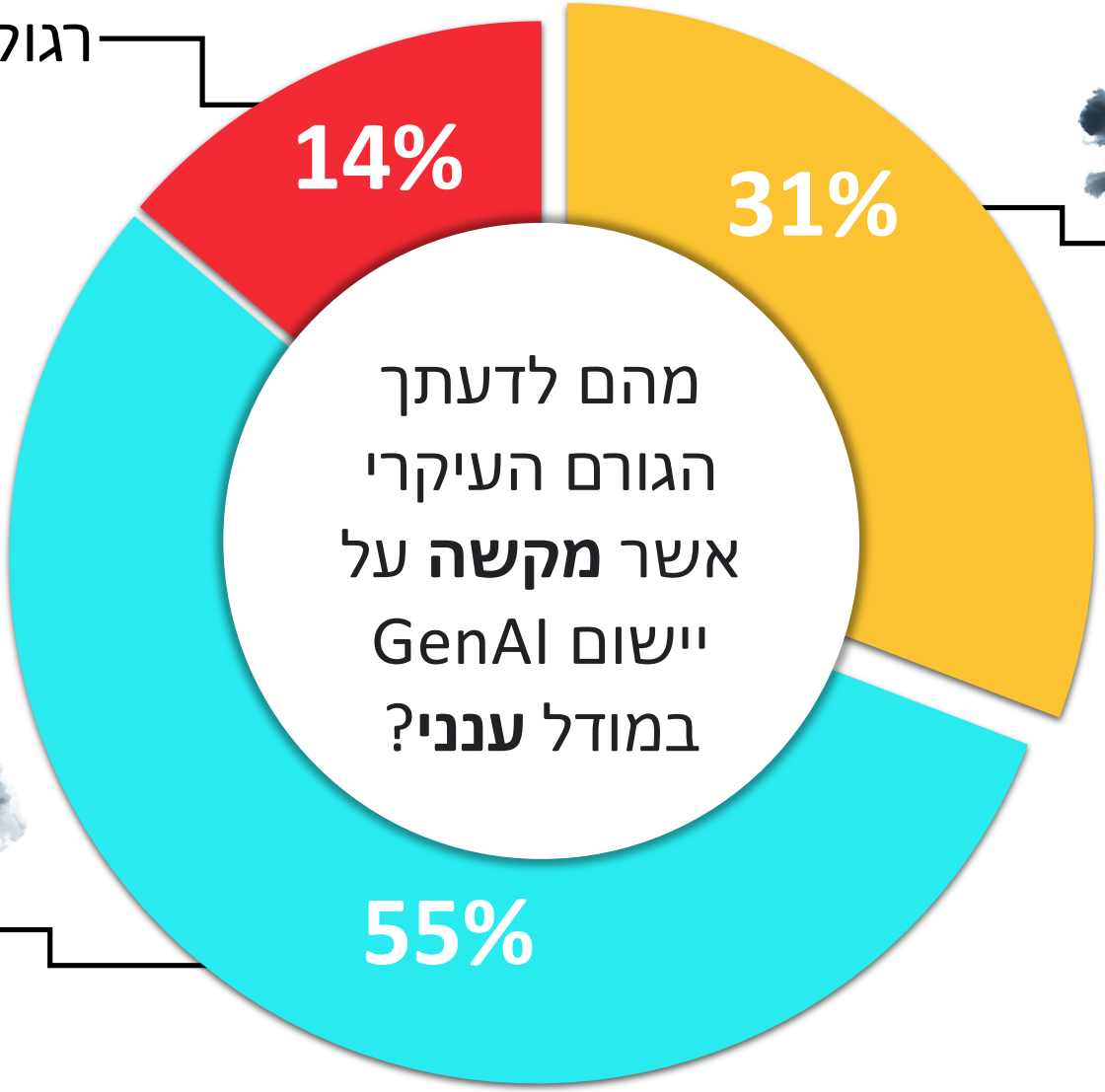
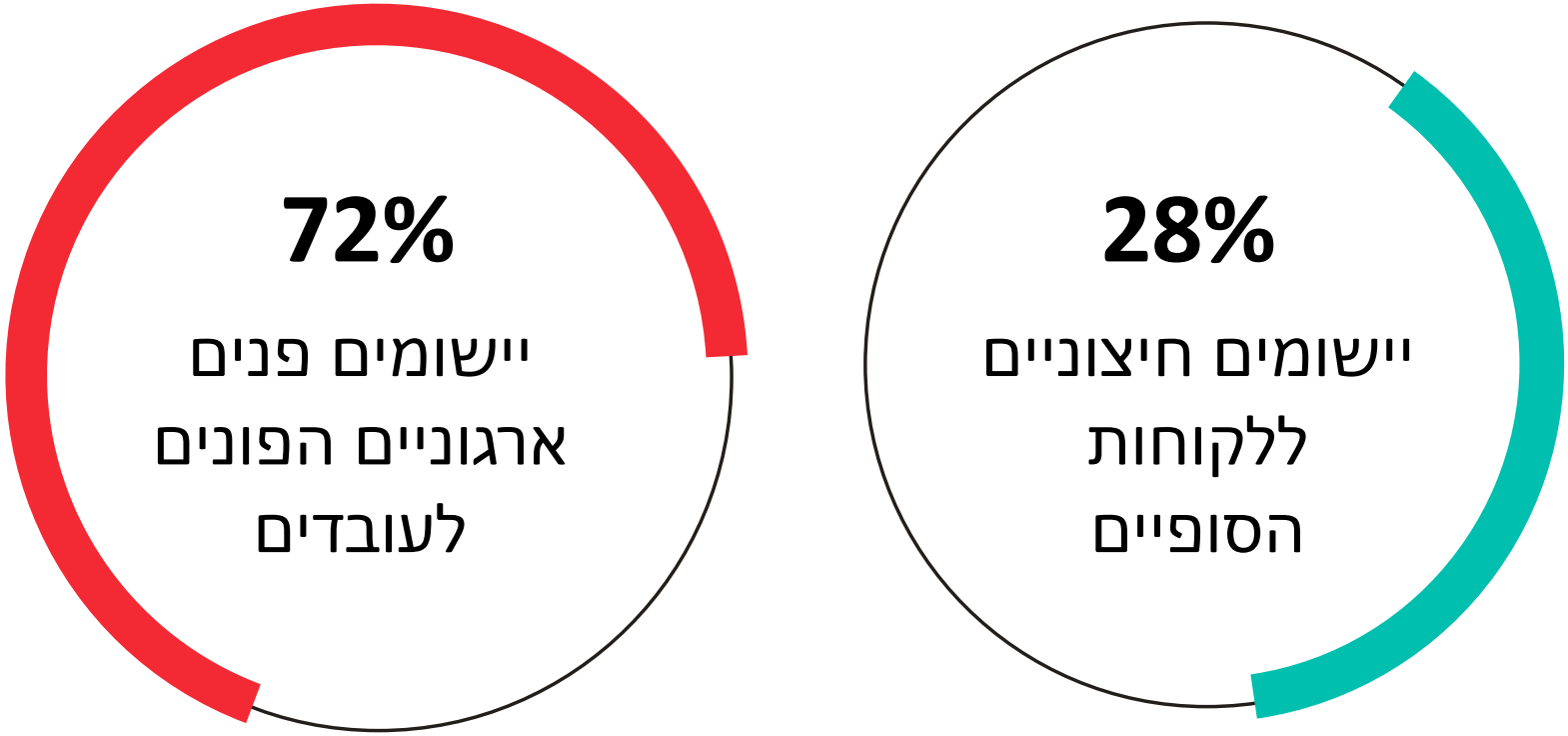
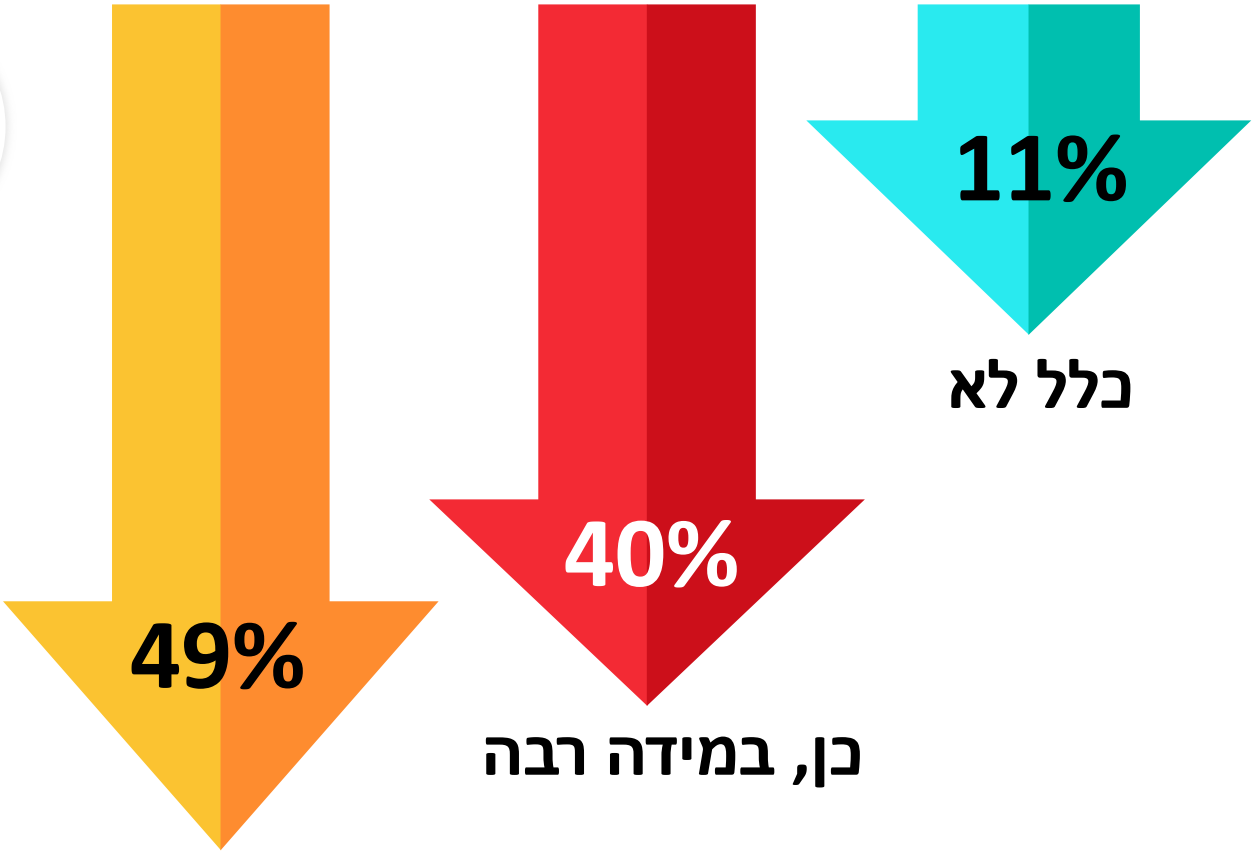
מהו המודל המועדף ליישום GenAI?



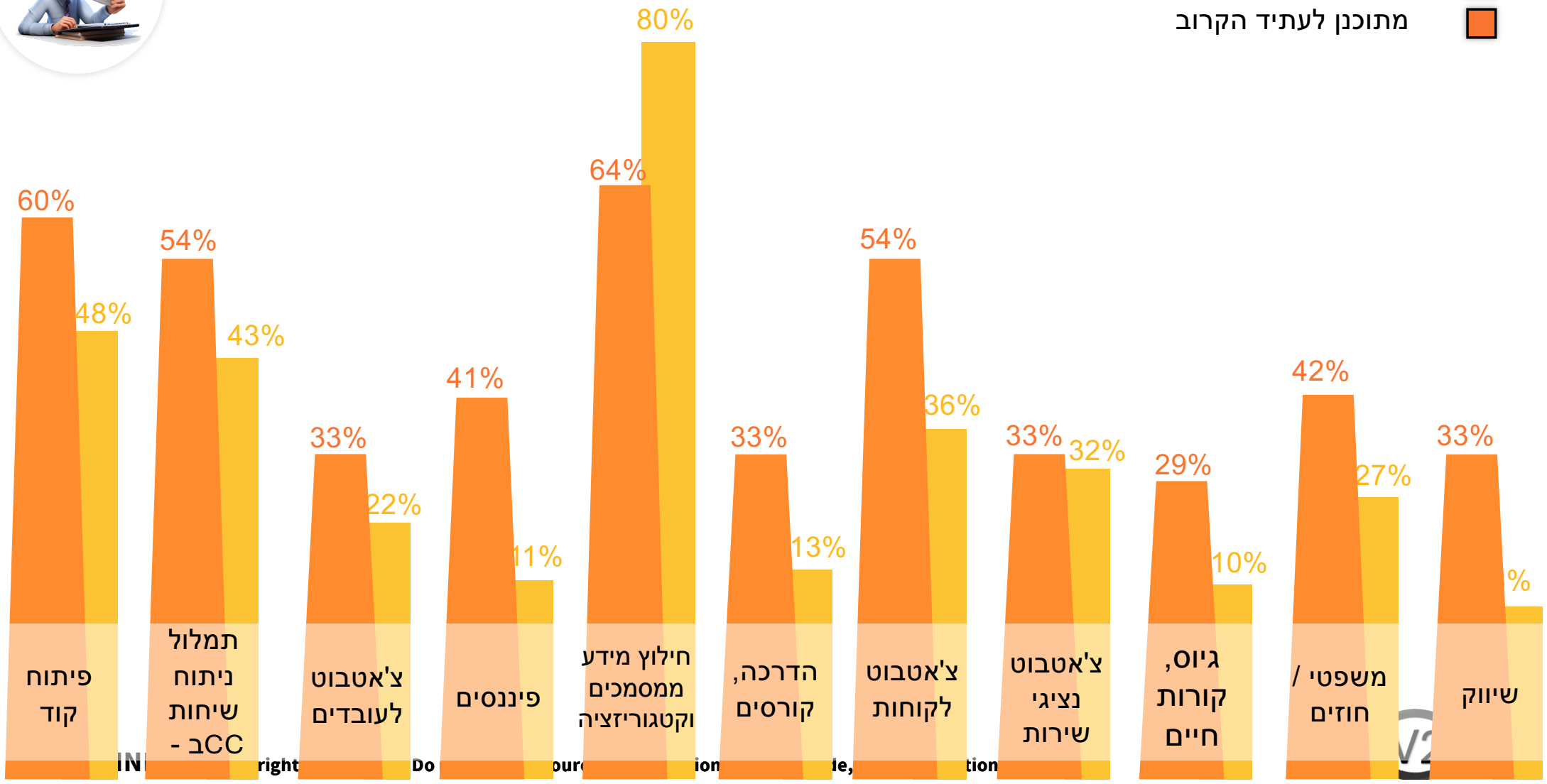


באופן כללי, במה לדעתך GenAI מפיק יותר ערך לארגון?





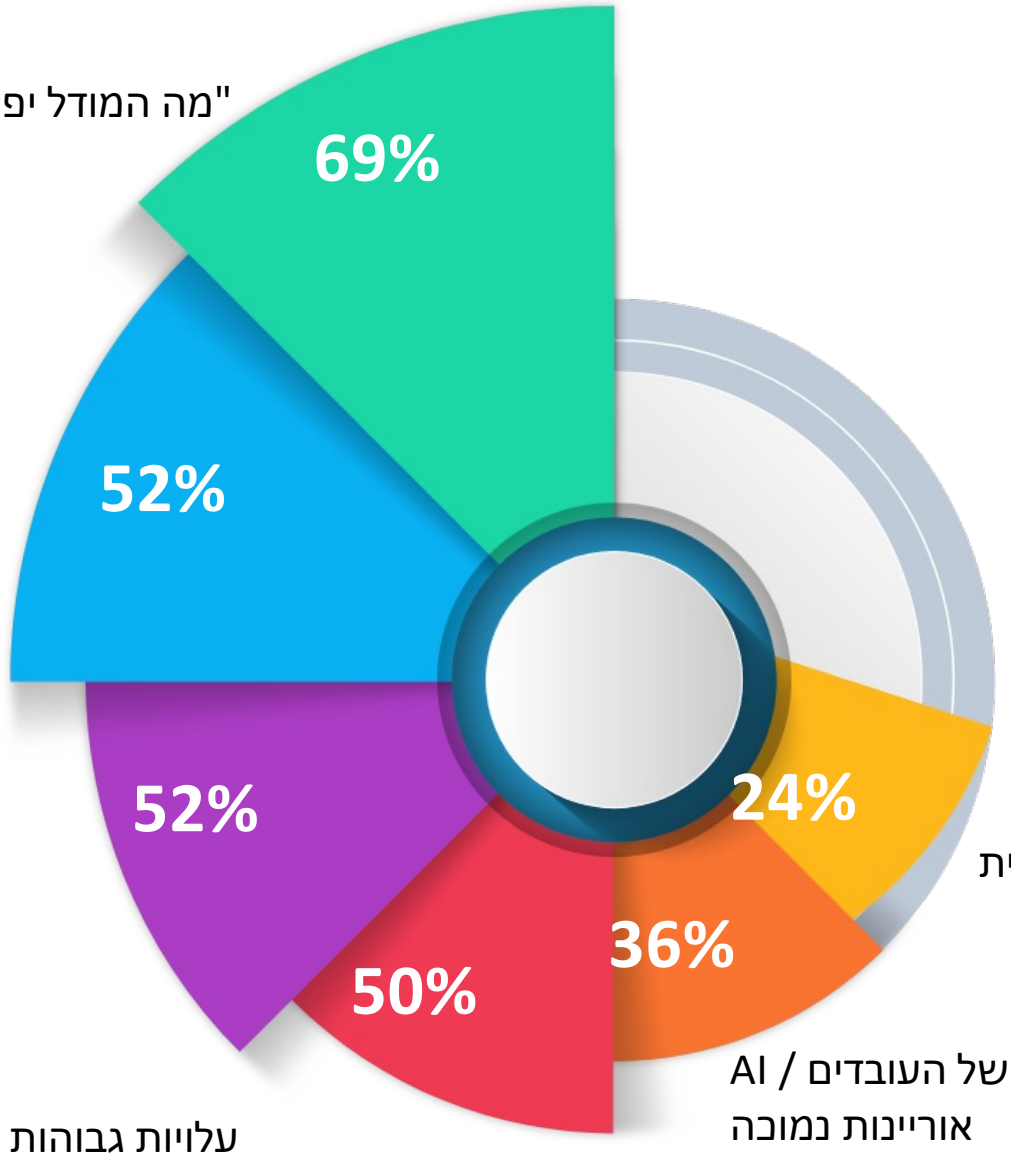
האם כבר ראיתם
תועלות מוחשיות
בתוצאה מיישום
?GenAI


עובד כיום / בפיילוט מתקדם
מתוכנן לעתיד הקרוב
60%
48%
54%
43%
33%
22%
41%
11%
64%
80%
33%
13%
54%
36%
33%
32%
29%
10%
42%
27%
33%
%
פיתוח קוד
תמלול ניתוח שיחות - בCC
צ'אטבוט לעובדים
פיננסים
חילוץ מידע ממסמכים וקטגוריזציה
הדרכה, קורסים
צ'אטבוט לקוחות
צ'אטבוט נציגי שירות
ג'יוס, קורות חיים
משפטי / חוזים
שיווק

חוסר דיוק
"מה המודל יפלוט ברגע האמת?"

מהם האתגרים העיקריים סביב יישום Generative AI?

בחירה מרובה



סייבר ואבטחת מידע

פרטיות ורגולציה

חוסר מוכנות טכנולוגית

חוסר מוכנות של העובדים / AI
אוריינות נמוכה

עלויות גבוהות / לא צפויות

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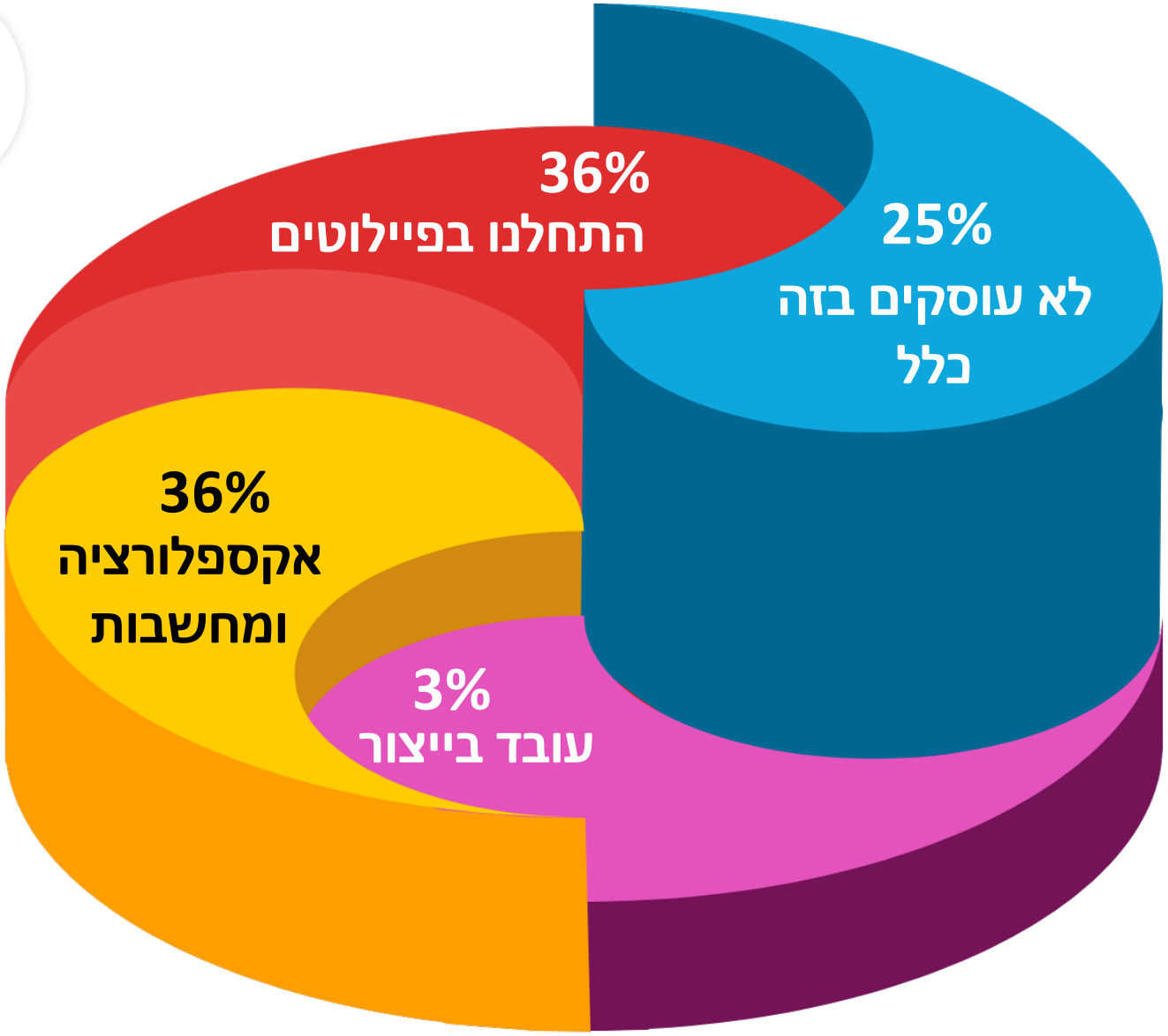
על איזה תחום תהיה ל- **Agentic AI** ההשפעה המשמעותית ביותר בארגונך?

- משימות אדמיניסטרטיביות יומיומיות — 49%
- תחום של שירות לקוחות ו Call Center — 52%
- אוטומציית תהליכים והתייעלות פנים ארגונית — 79%
- פיתוח יכולות ארגוניות חדשות — 45%
- Predictive Analytics , מחקר ופיתוח — 3%

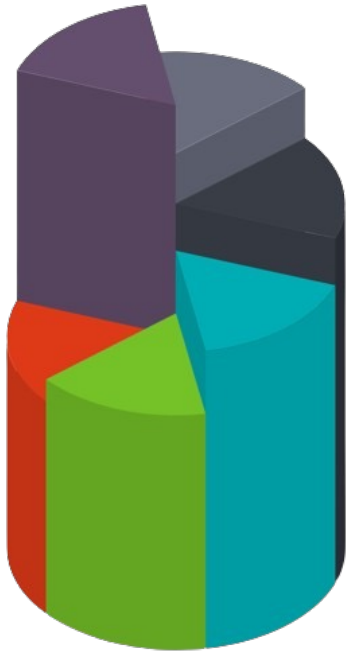
V2 95



באיזה שלב אתם נמצאים באימוץ **Agentic AI**?

V2 96

CDO Benchmark in Israel
STKI study 2025



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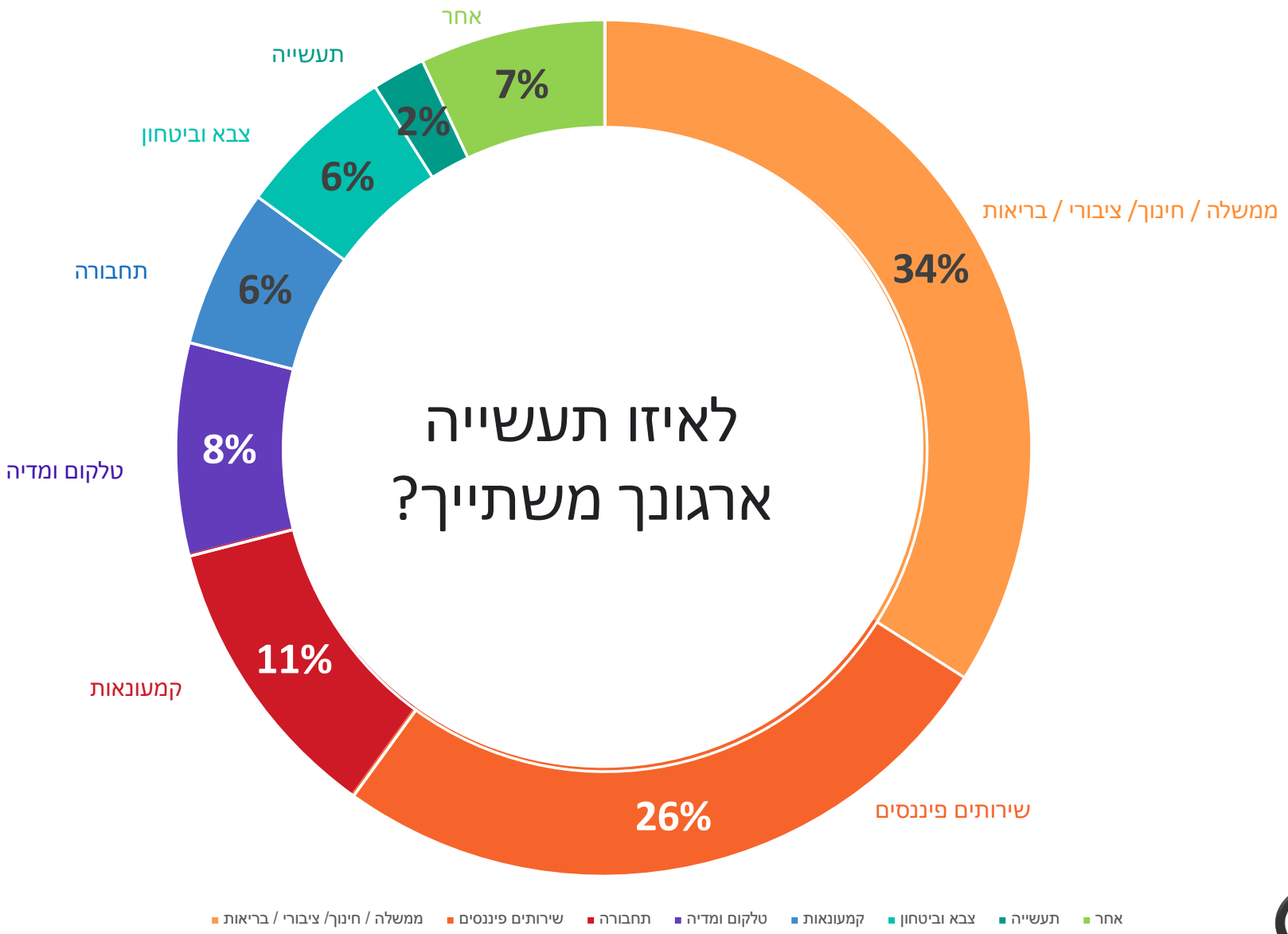
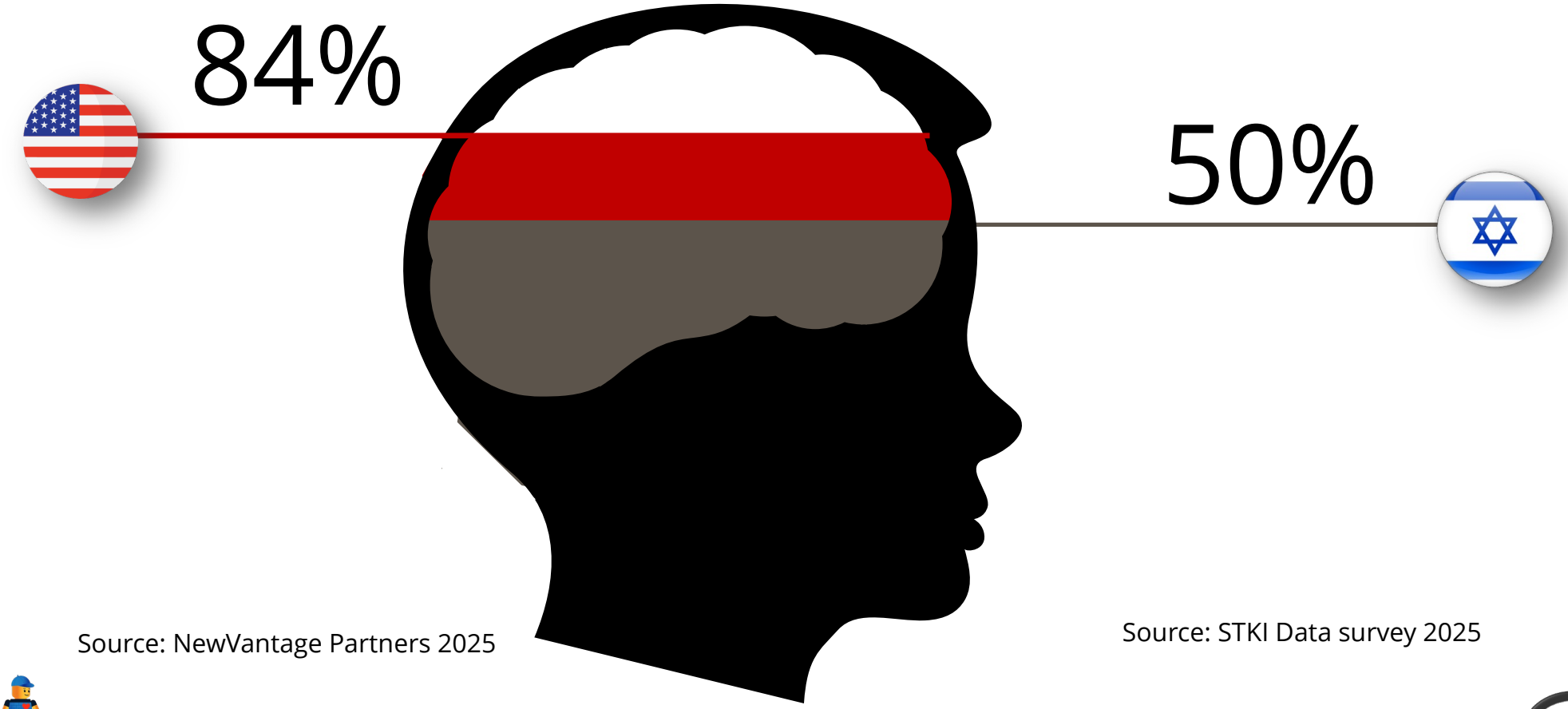


How many **organizations** have a CDAO?

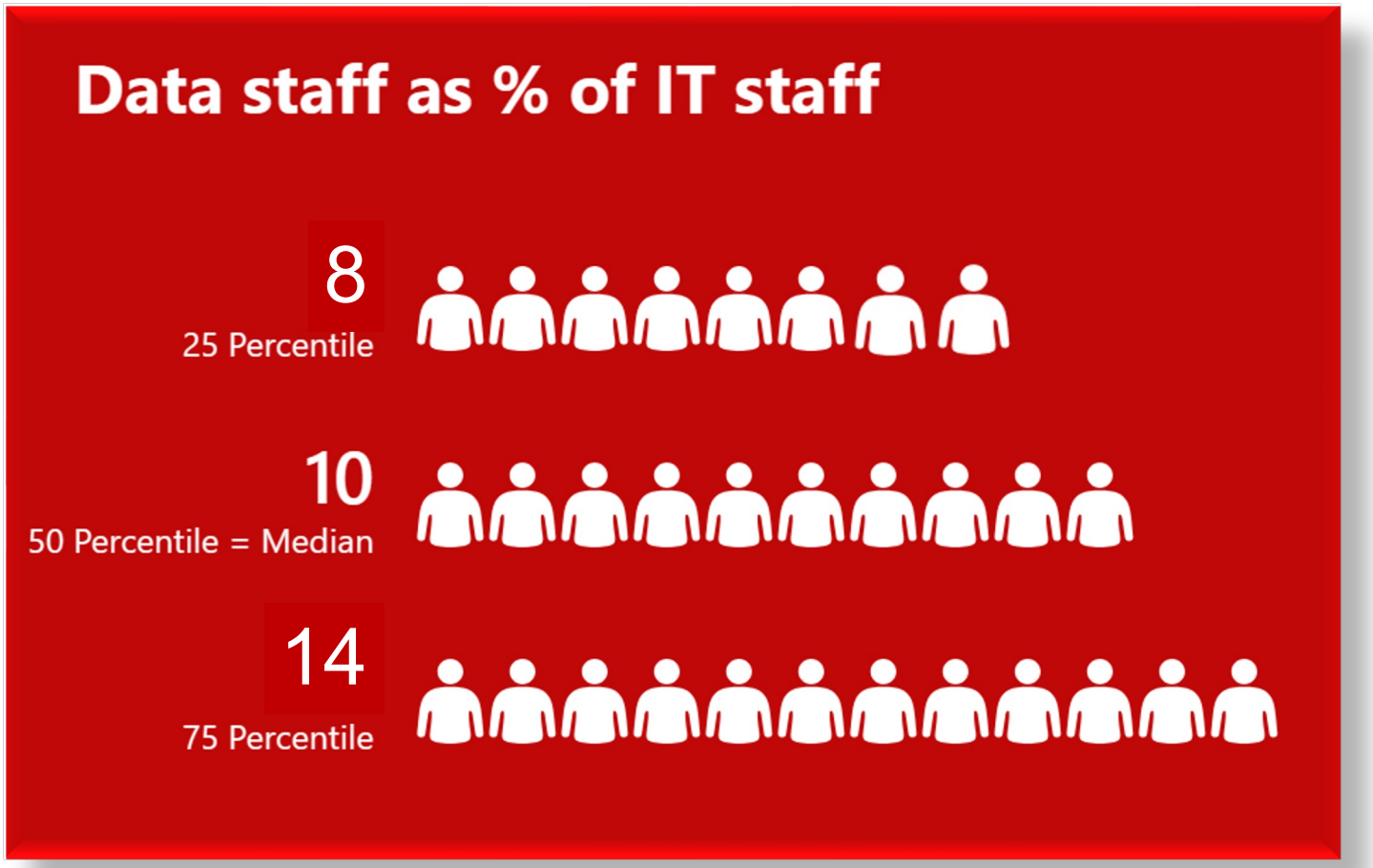
(CDAO: Chief Data Analytics Officer)



Source: NewVantage Partners 2025

Source: STKI Data survey 2025

V2



*** Analytical data staff, not transactional DBAs**

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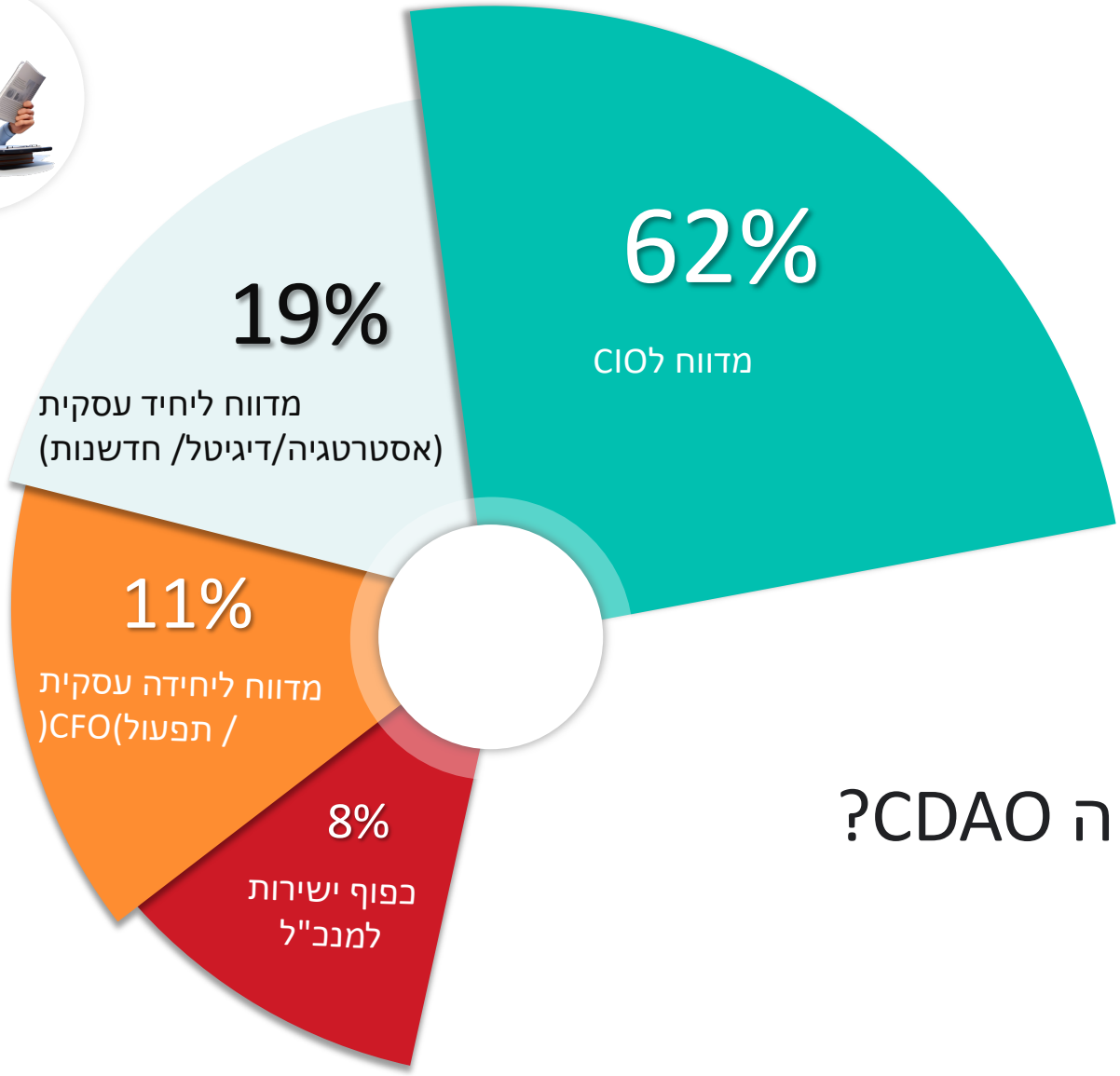
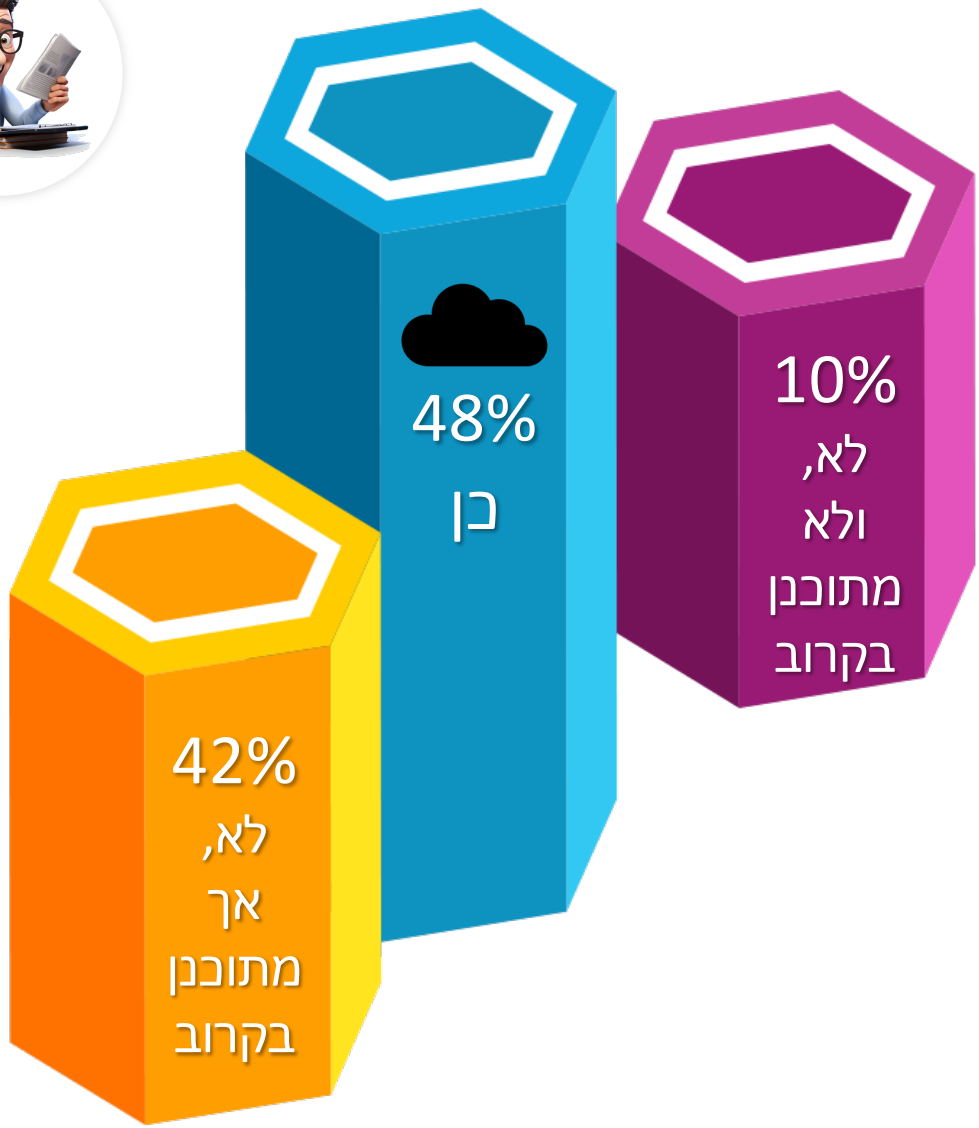


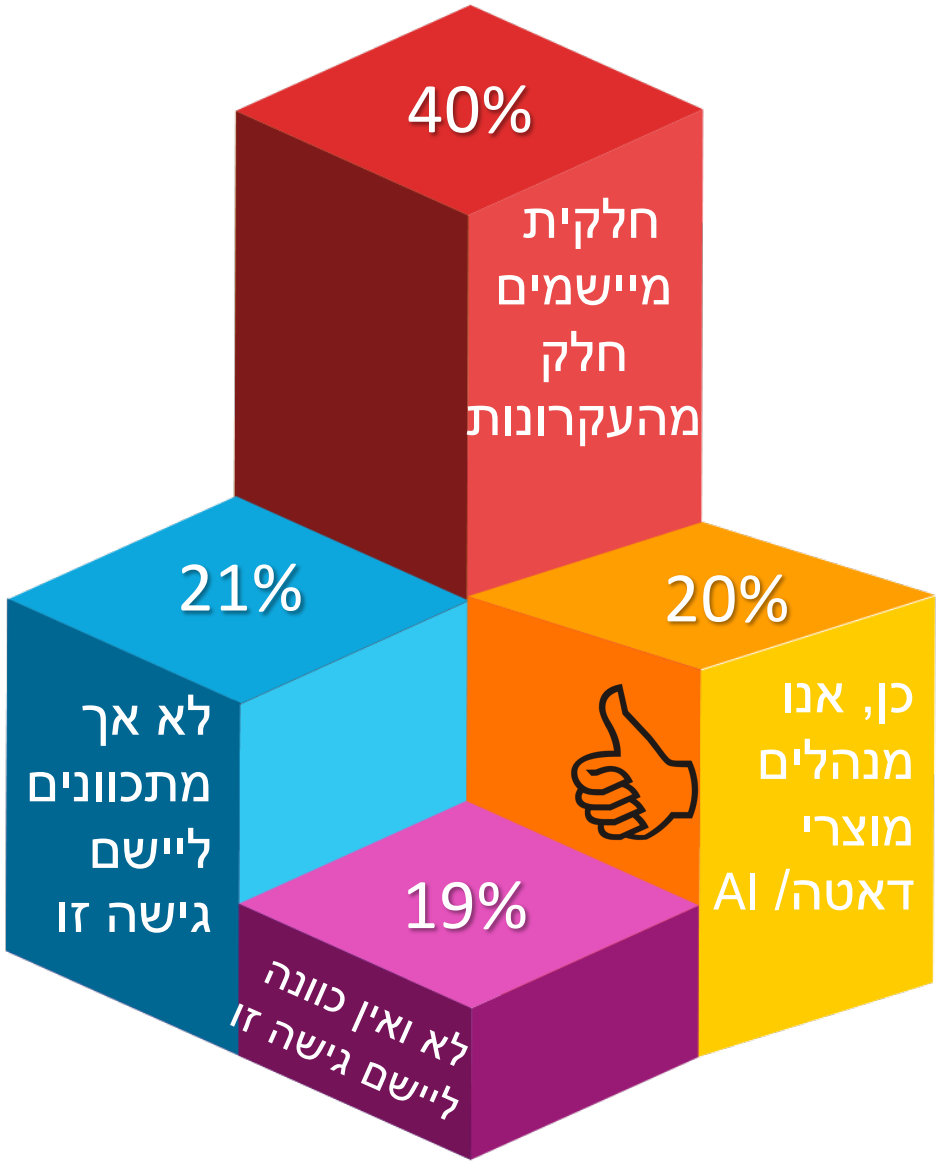
Israeli CDOs are analytical and execution-oriented

למי מדווח/ת ה CDAO?

V2 101



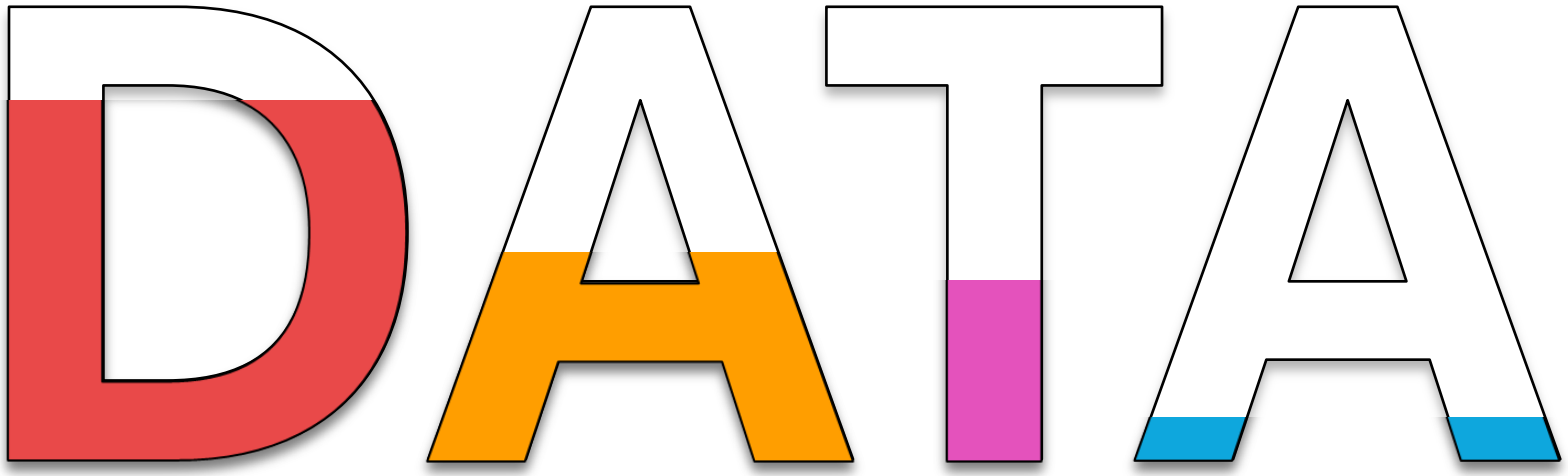
האם אתם עובדים כיום בענן לטובת דאטה ואנליטיקה?



האם אתם
מיישמים גישת
ניהול מוצר
בעולם הדאטה?

V2 103

מהי ארכיטקטורת הנתונים הנבחרת/ מתוכננת בארגונך? בחירה מרובה



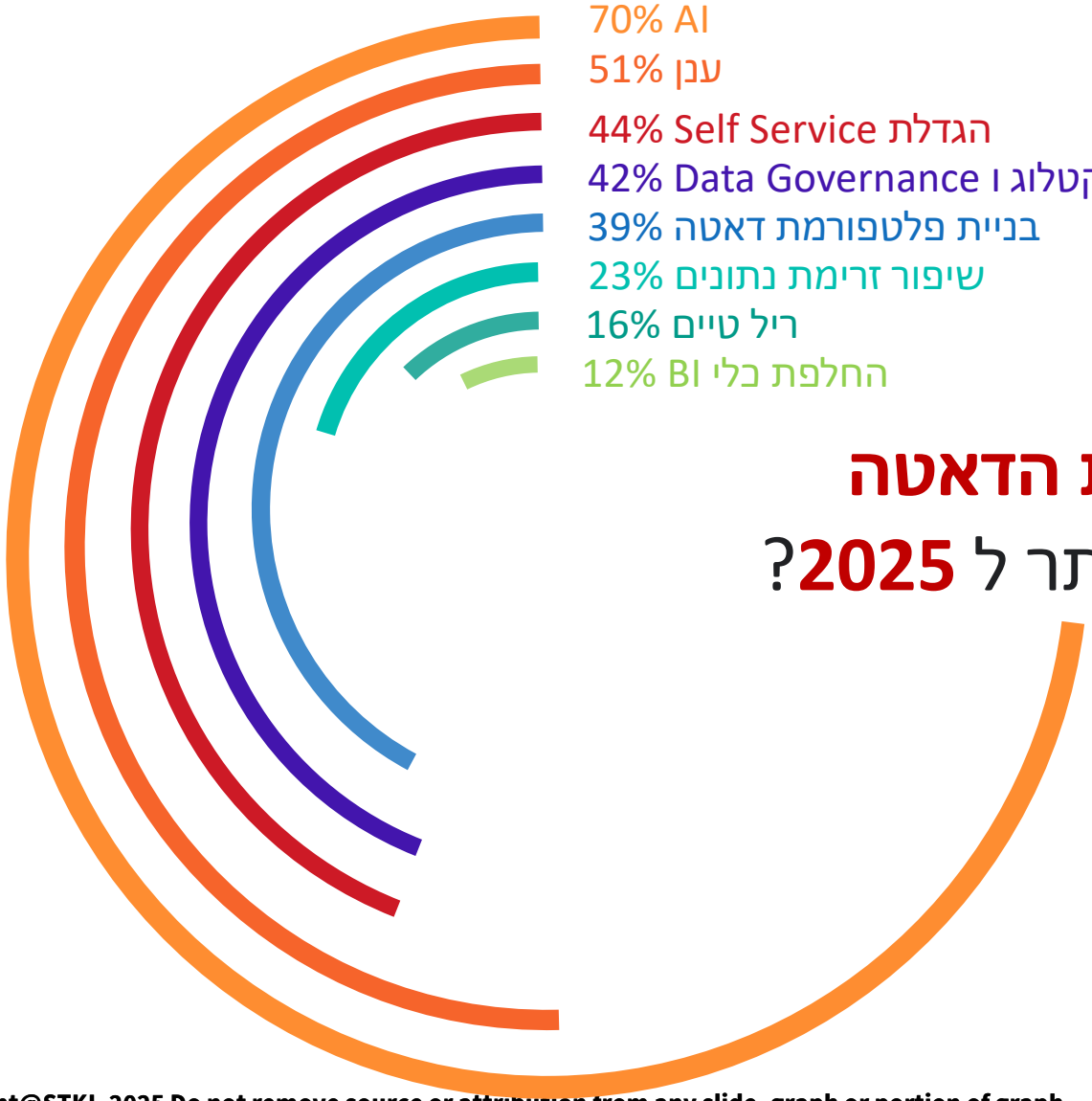
77%
Data Warehouse

39%
Data Lakehouse

36%
Data Lake

7%
Data Fabric/Mesh

V2 104



מהן **יוזמות הדאטה** החשובות ביותר ל **2025**?

V2

MARKET PULSE

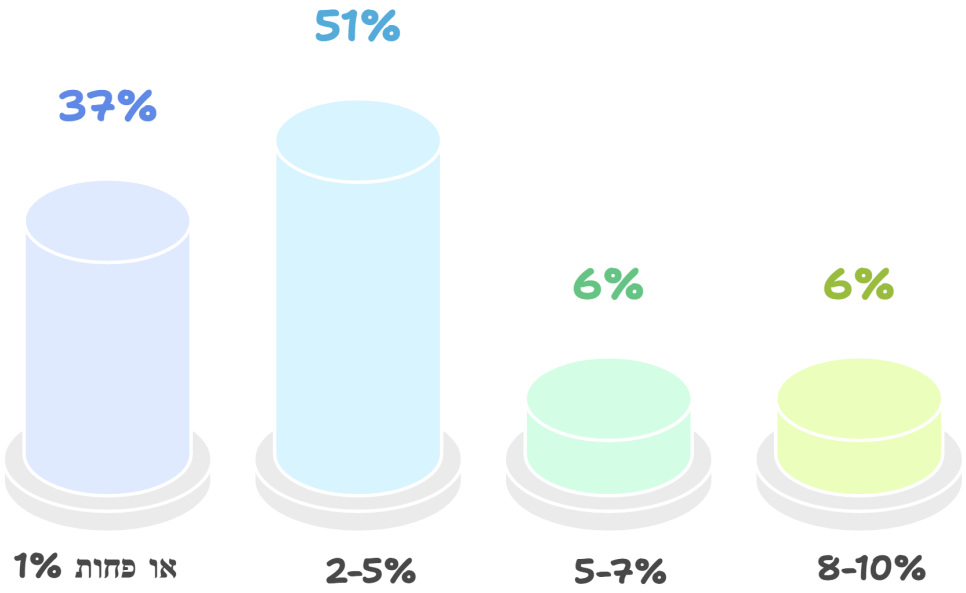
The Israeli Market Pulse on

IT Organization and **OCIO**

V2

מהו גודל של OCIO ביחס לגודל זו?

לעומת OCIO של פחות מ 1% ברוב הארגונים לפני 12 שנה



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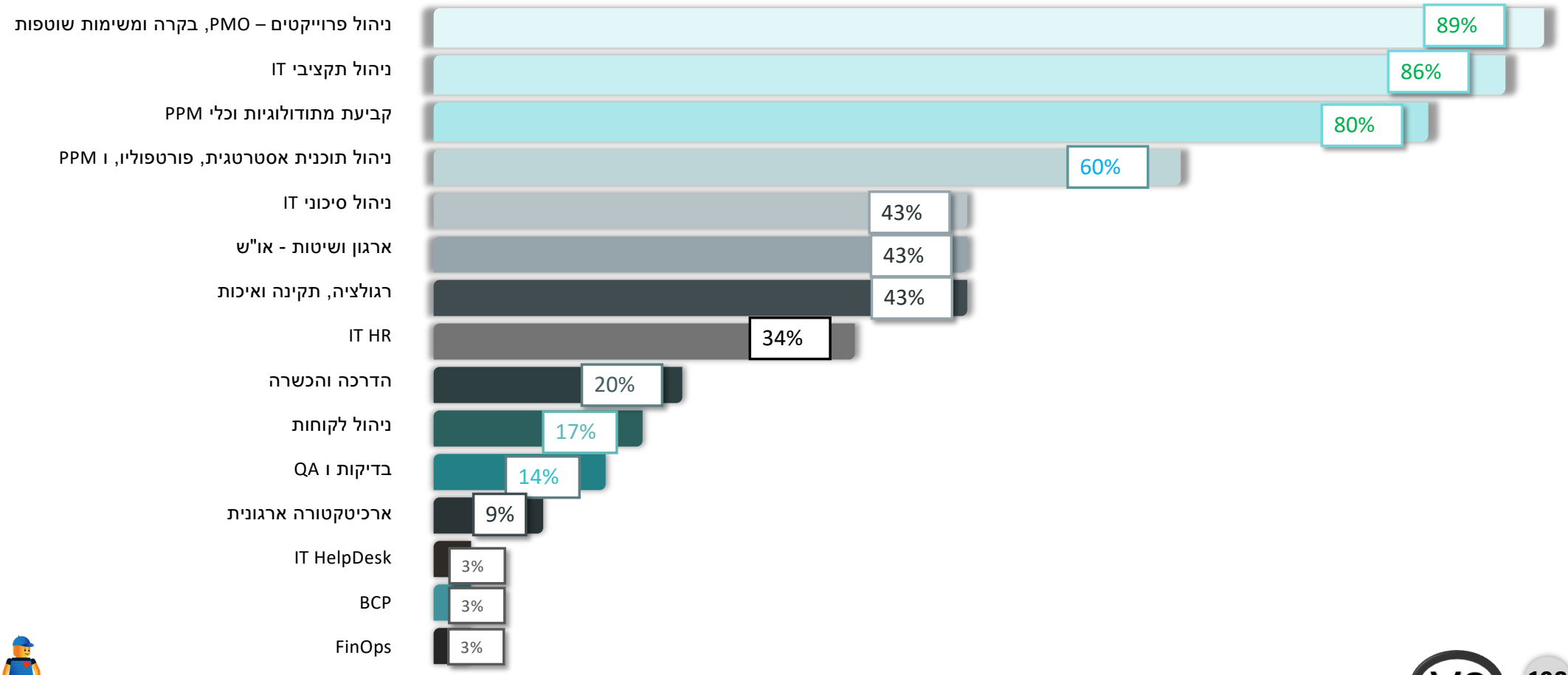
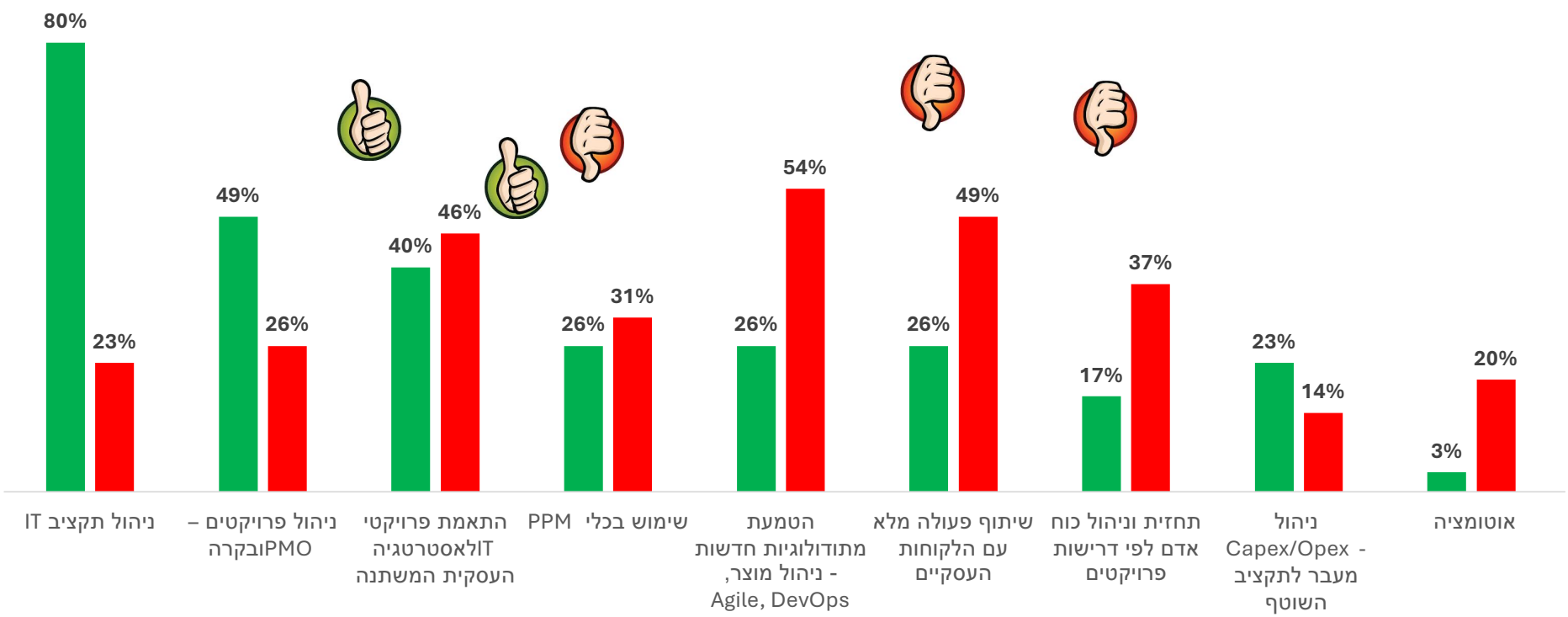
מהן תחומי האחריות של ה- OCIO בארגונכם ?



V2

מה לדעתכם עובד בצורה טובה כיום במטה ה- IT בארגונכם?

מהם האתגרים המרכזיים של מטה ה IT-בארגונכם כיום ?



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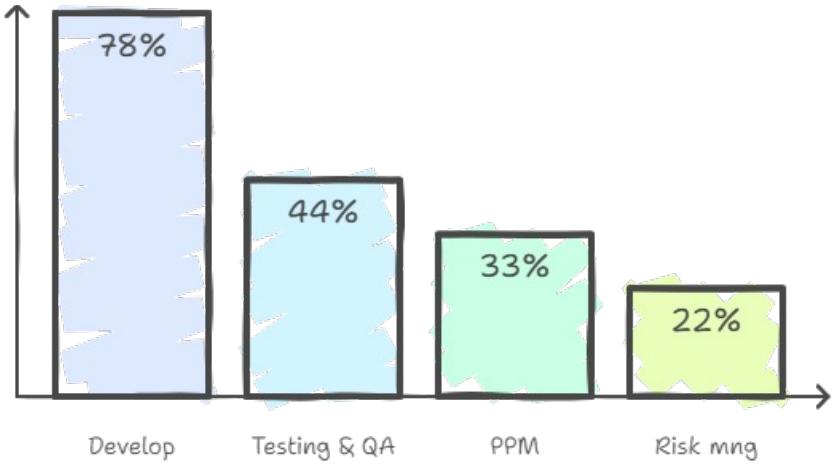
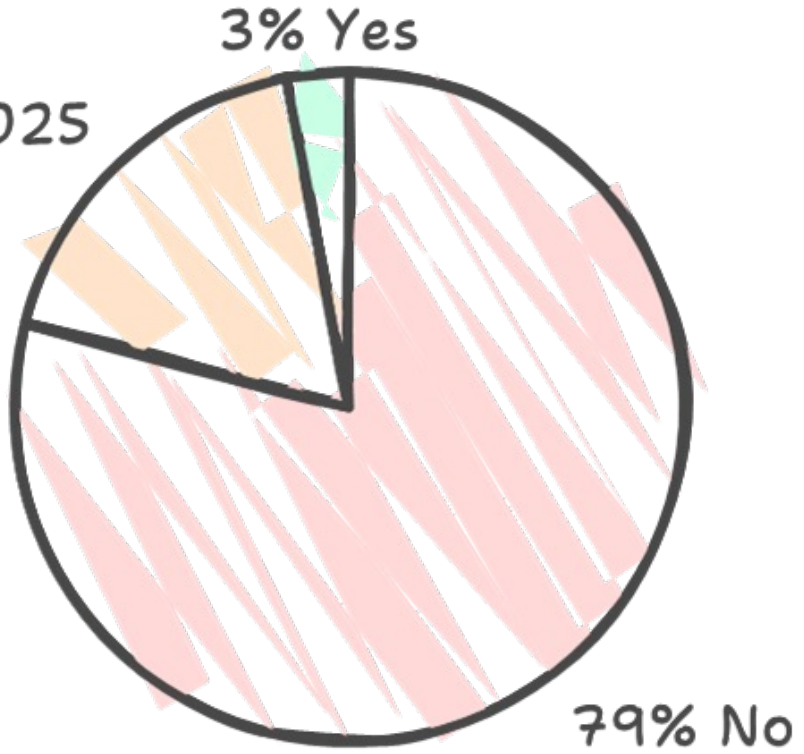
האם יש שימוש בכלי AI לניהול פרויקטים ?

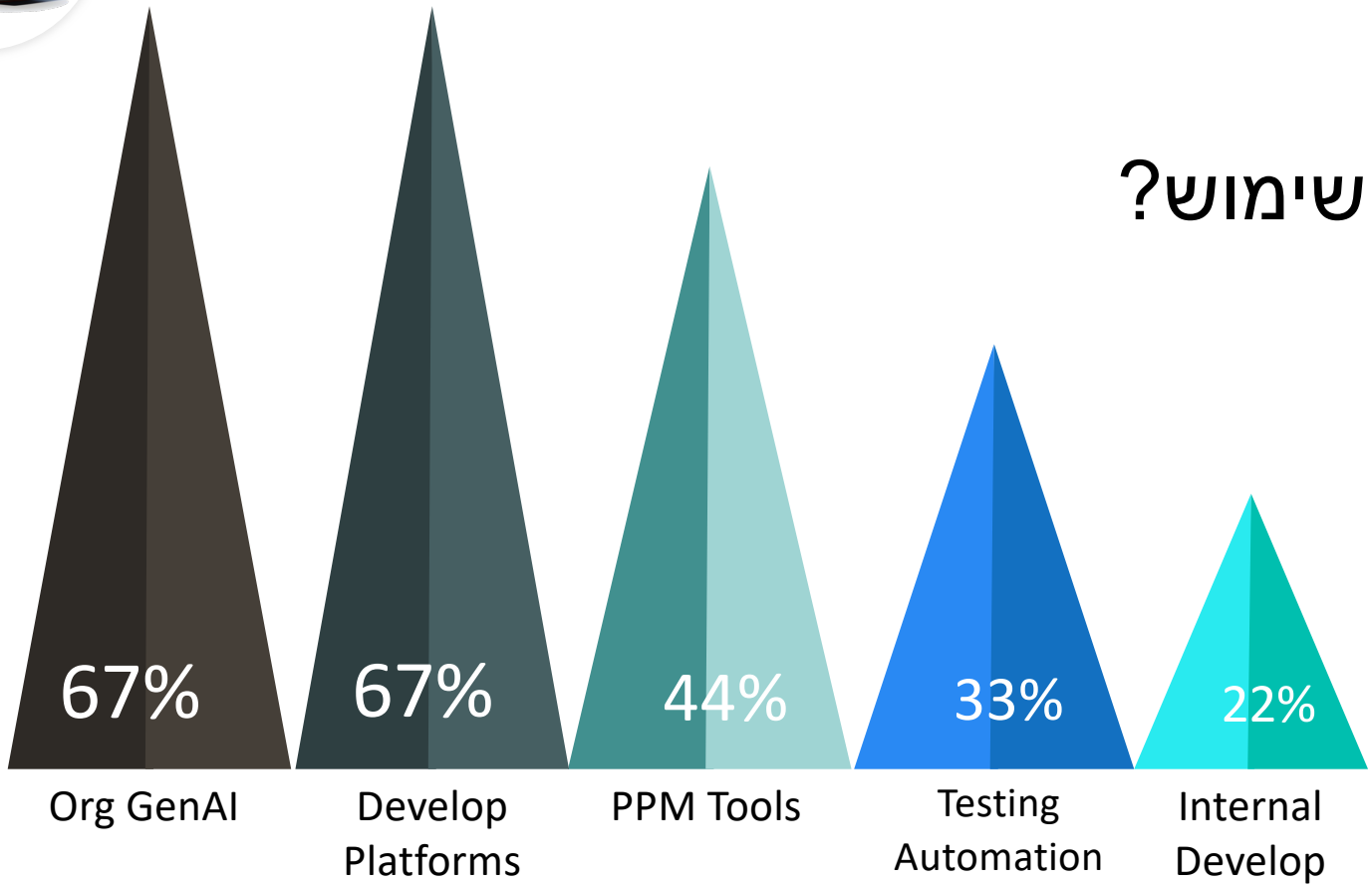




האם כן, באילו תהליכים ישולב?

V2

אם כן,
באילו כלים נעשה שימוש?



MARKET PULSE

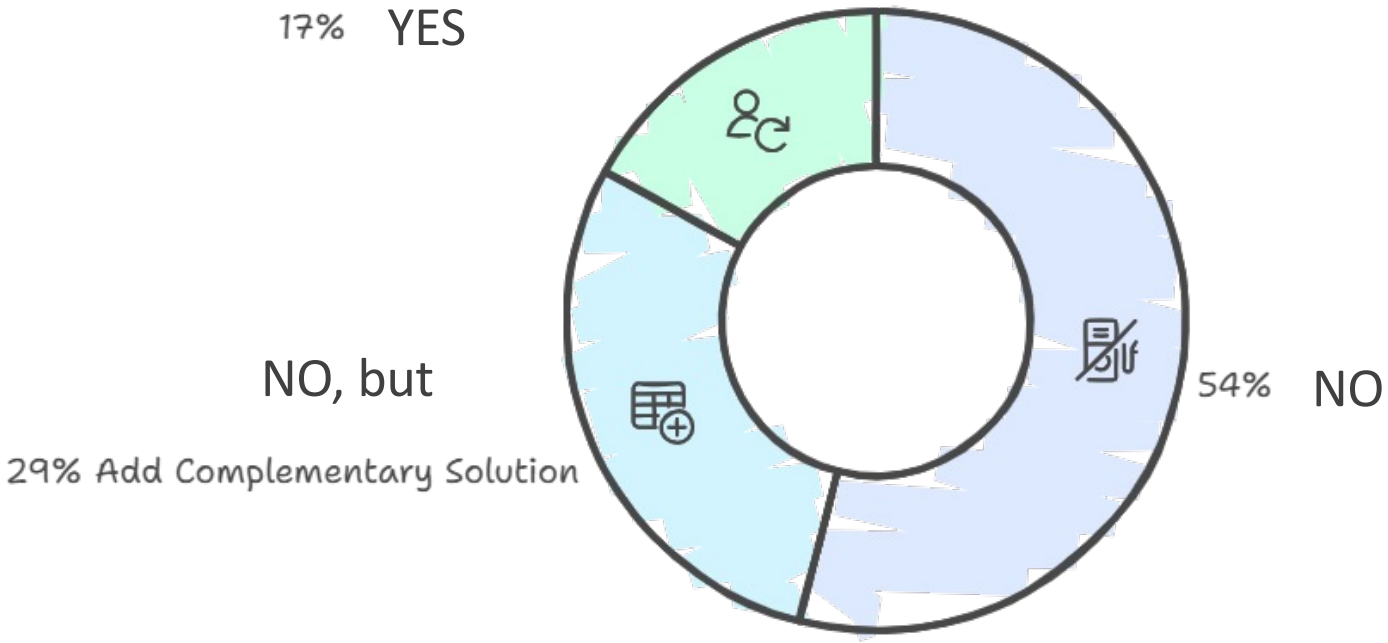
The Israeli Market Pulse on

PPM Tools

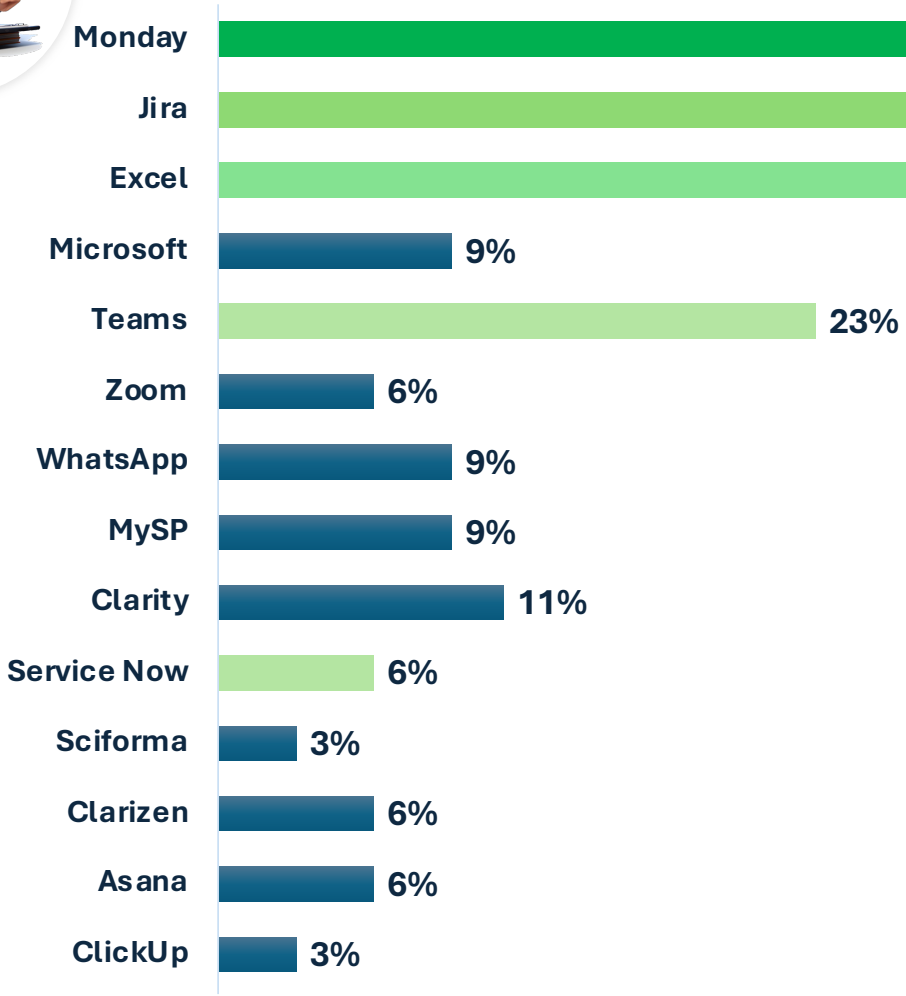
STKI.INFO

V2

האם אתם מתכננים להחליף את כלי ה- PPM הקיים בארגון?



V2 113

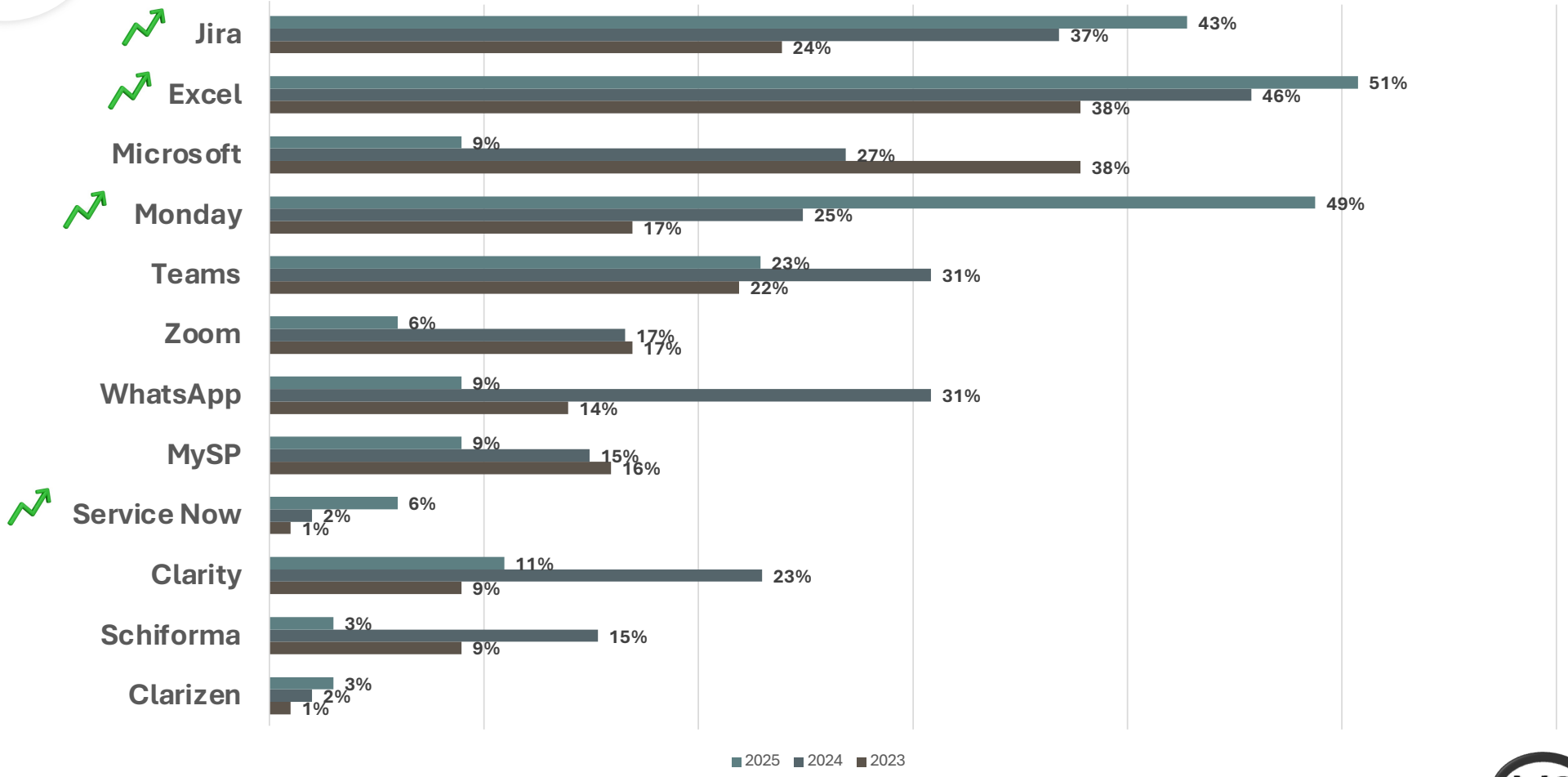


מהפך

באילו מוצרים עובד ארגונך כיום לטובת ה PPM?

V2

PPM Tools Trend by Years



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V2

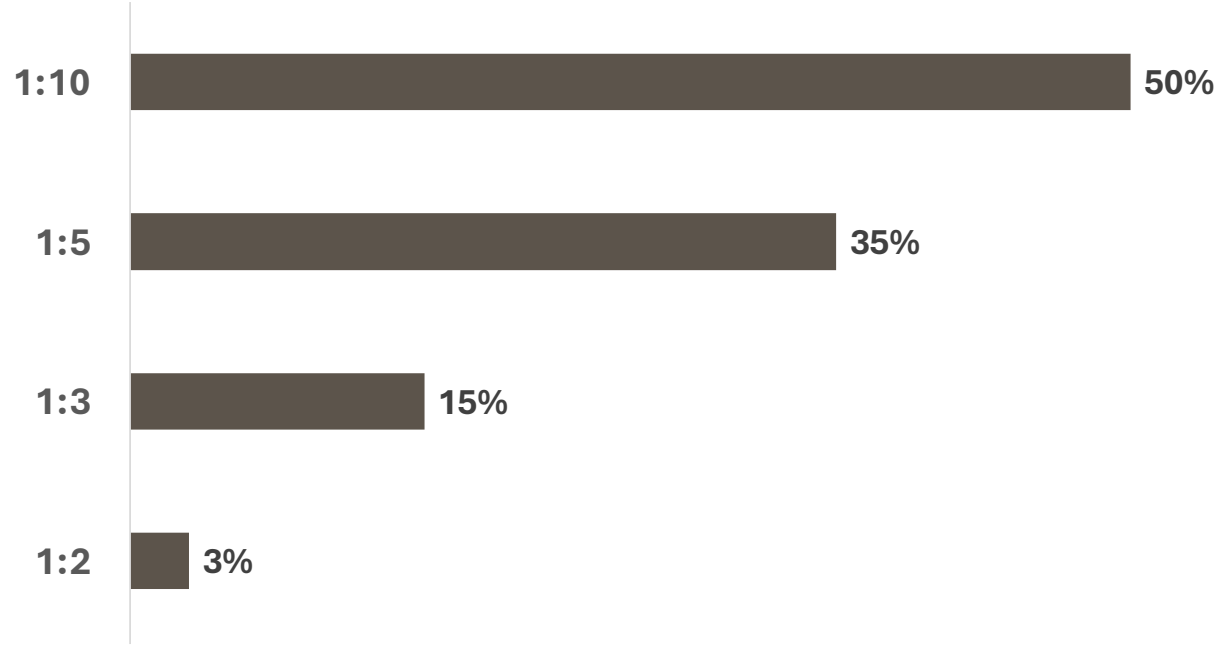
115

MARKET PULSE

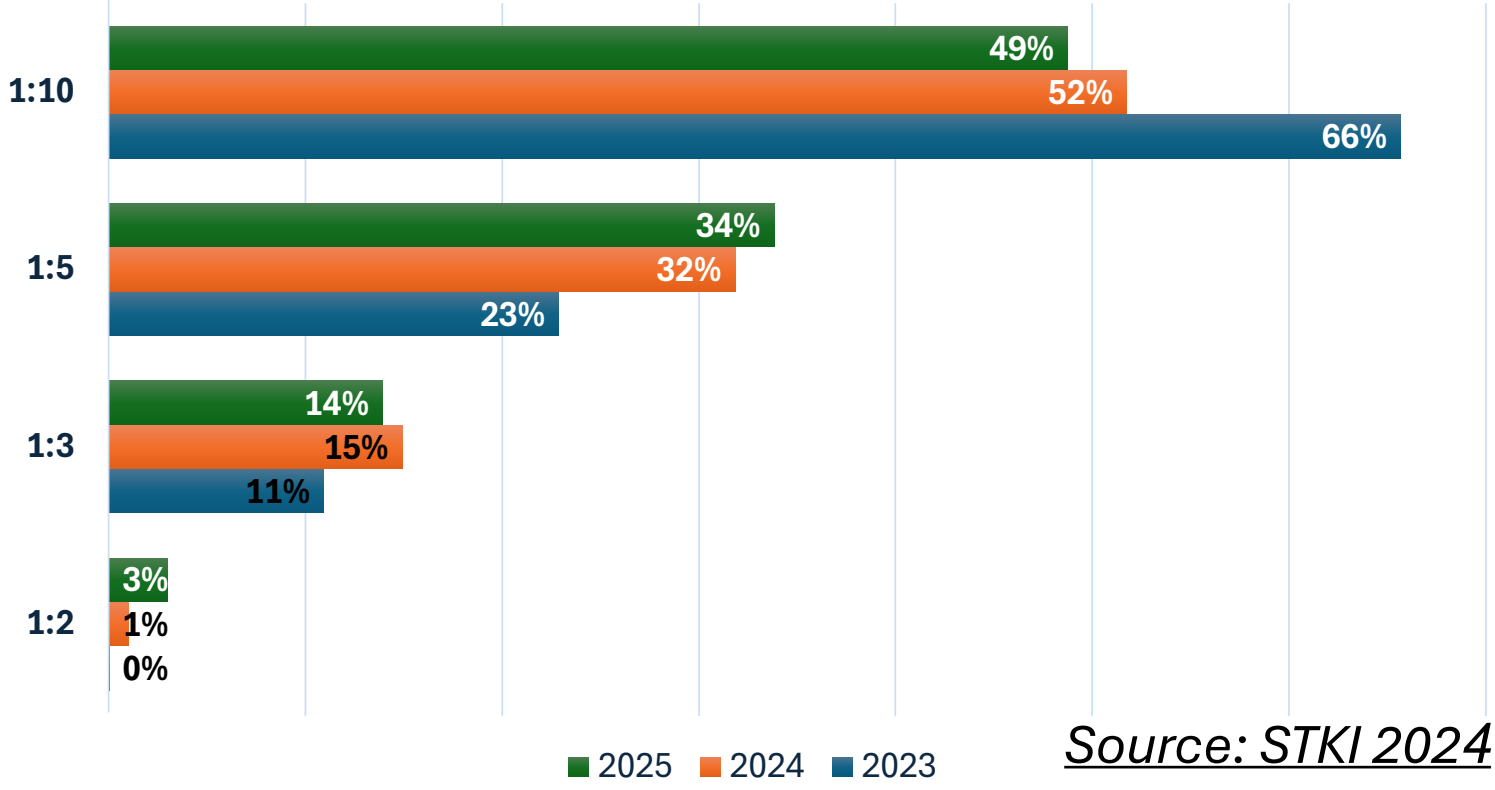
The Israeli Market Pulse on

QA & Testing (Automation)

מהו היחס בין מפתחים לבודקים בארגונכם?



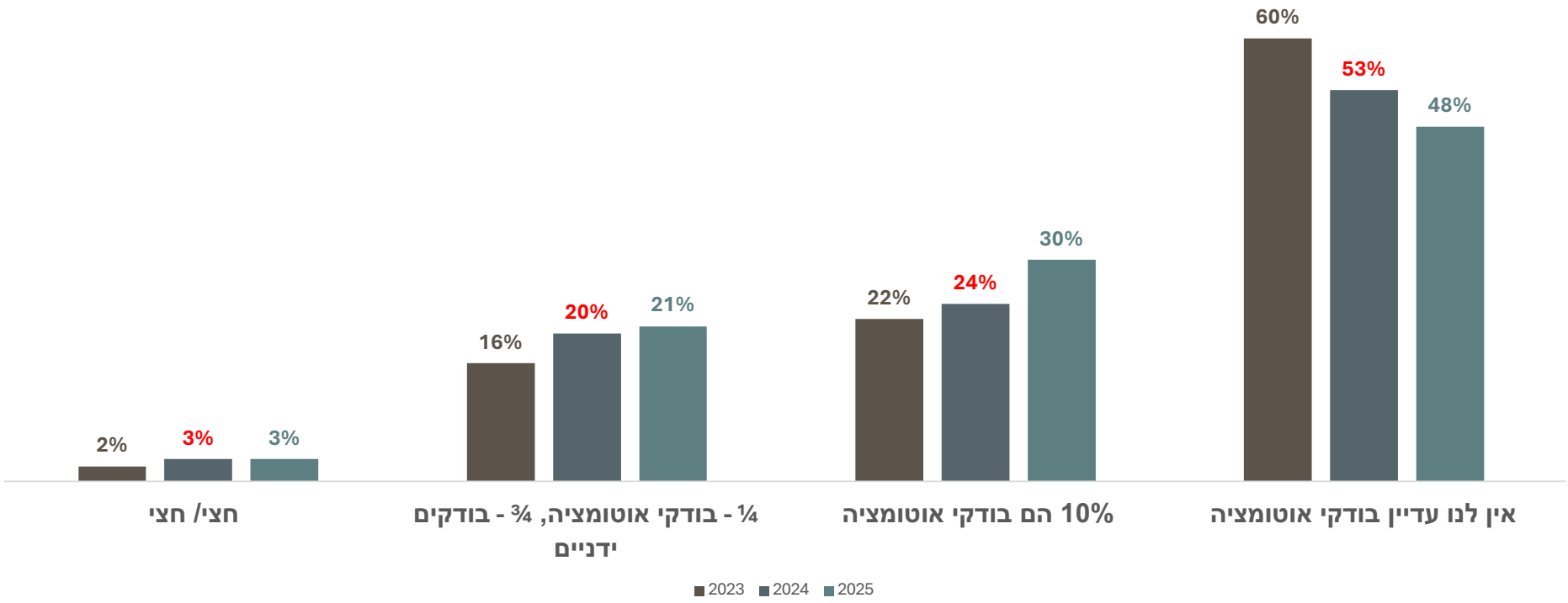
מהו היחס של מפתח : בודק בארגונך?



Source: STKI 2024

2023- מחצית 1:10
2024 - מחצית 1:5
פיתוח דיגטאל:
הרוב 1:3/ 1:4

מהו אחוז הבודקים הידניים לעומת בודקי האוטומציה בארגונכם?



V2

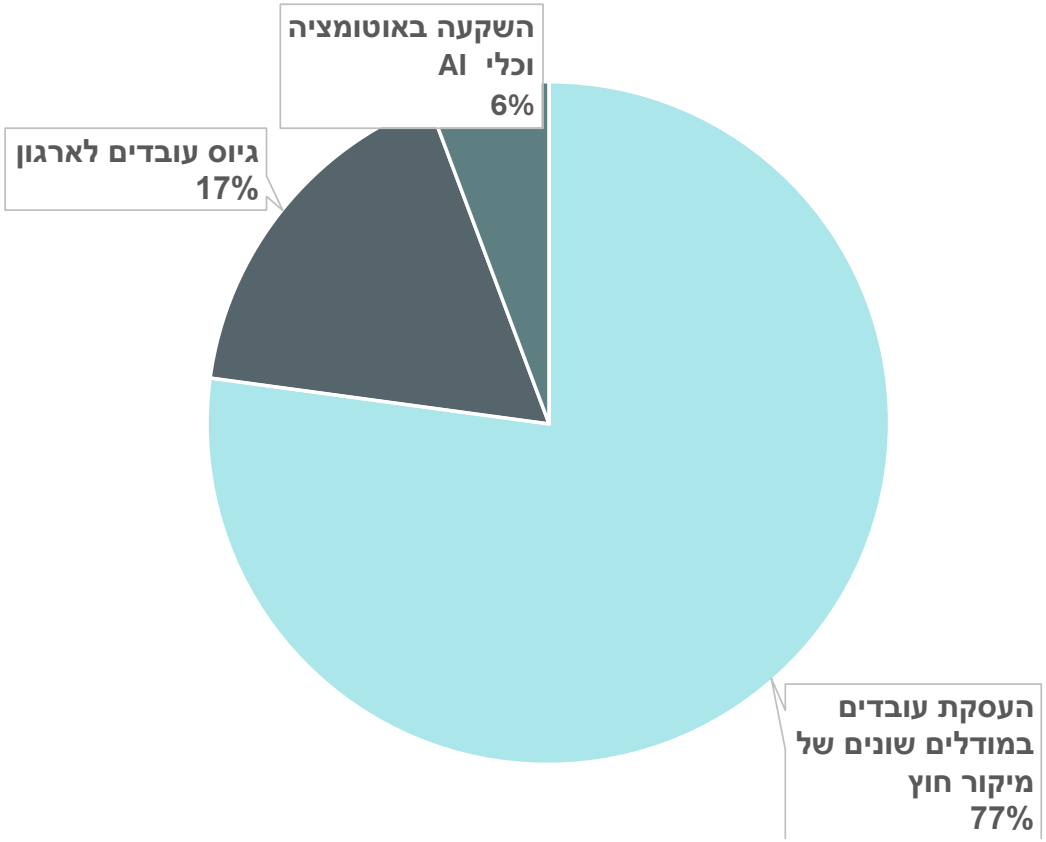
MARKET PULSE

The Israeli Market Pulse on

Sourcing

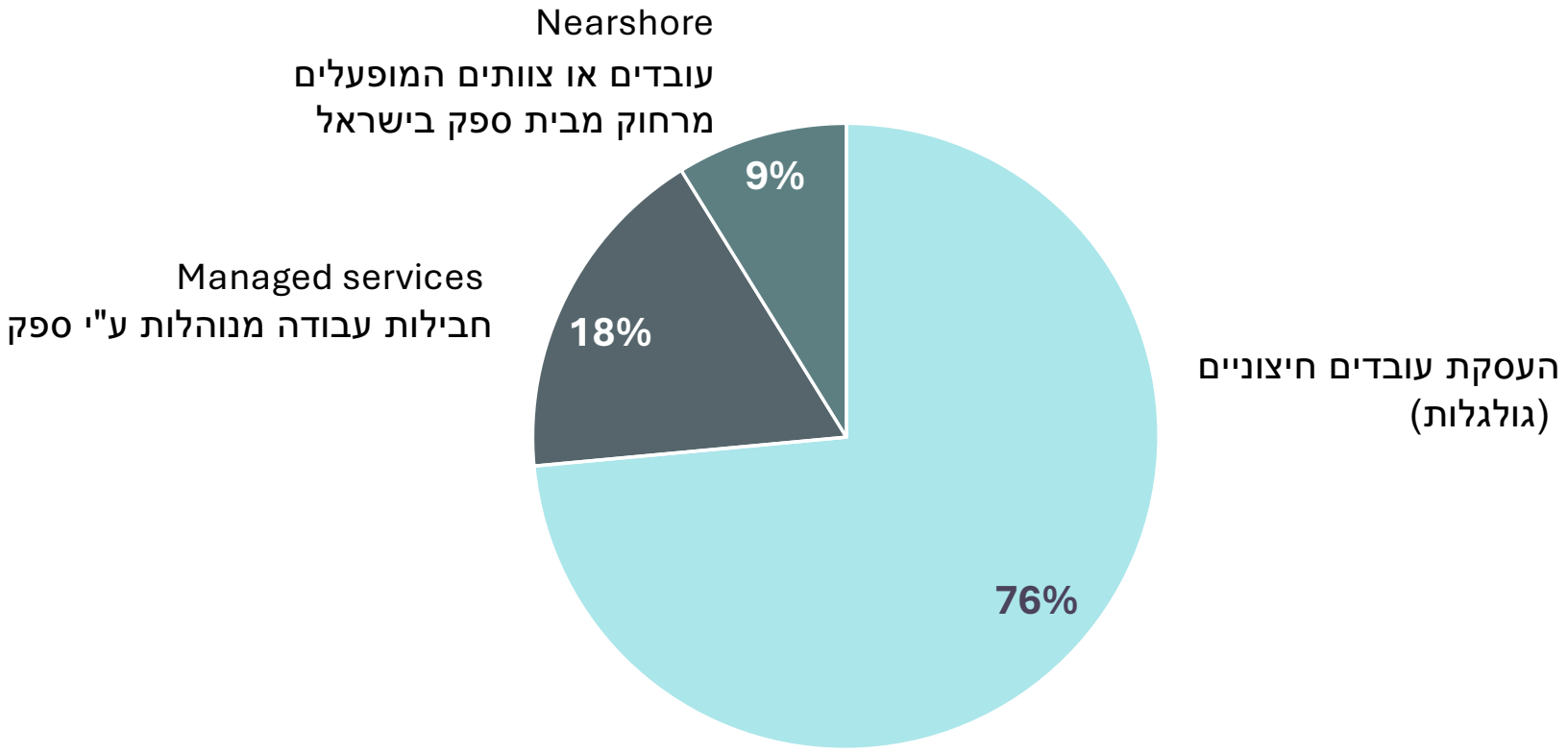
V2

במקרה של מחסור בכוח אדם, מהי ההעדפה בארגונכם?



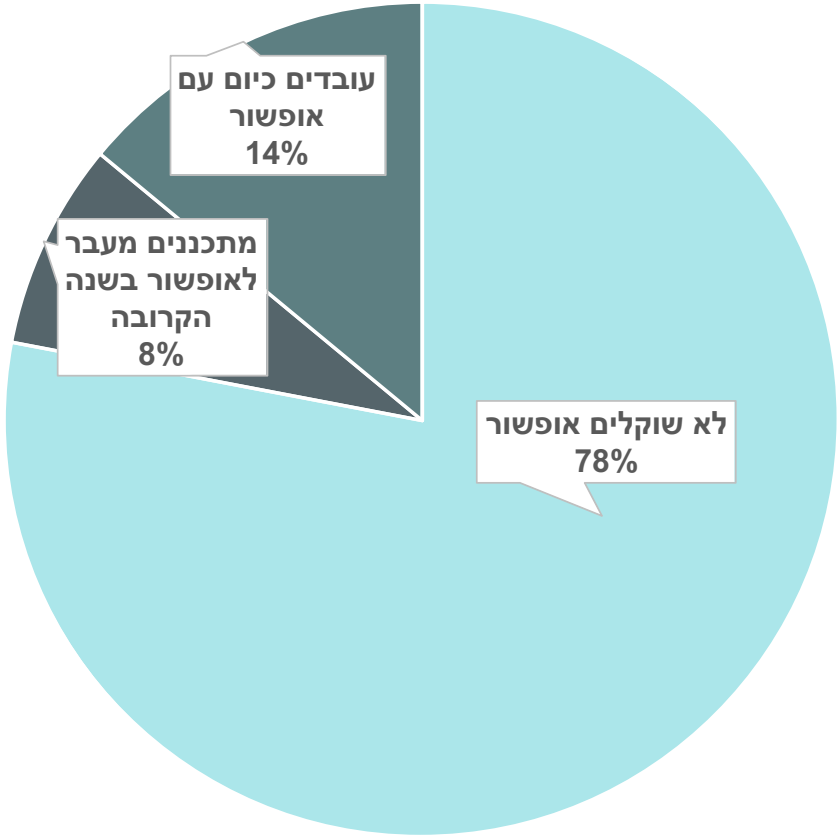
V2 121

מהו מודל מיקור החוץ המועדף בארגונכם כיום?



V2 122

מה מצב השימוש ב- Offshore בארגונכם?



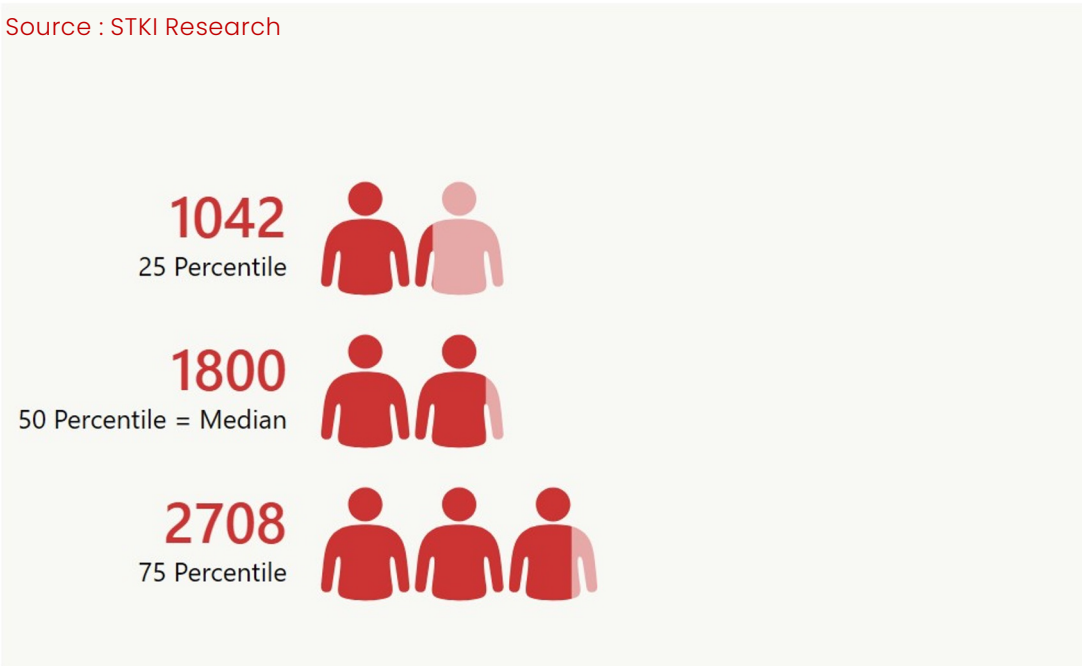
This is an extract from:
STKI Staffing Ratio Research

- **In Enterprises IT**
- **Infrastructure – Cyber - Operations**

The complete report is located at :
https://www.stki.info/_files/ugd/0b88a6_537d843d77ec423c9c46fdfde7d0436f.pdf

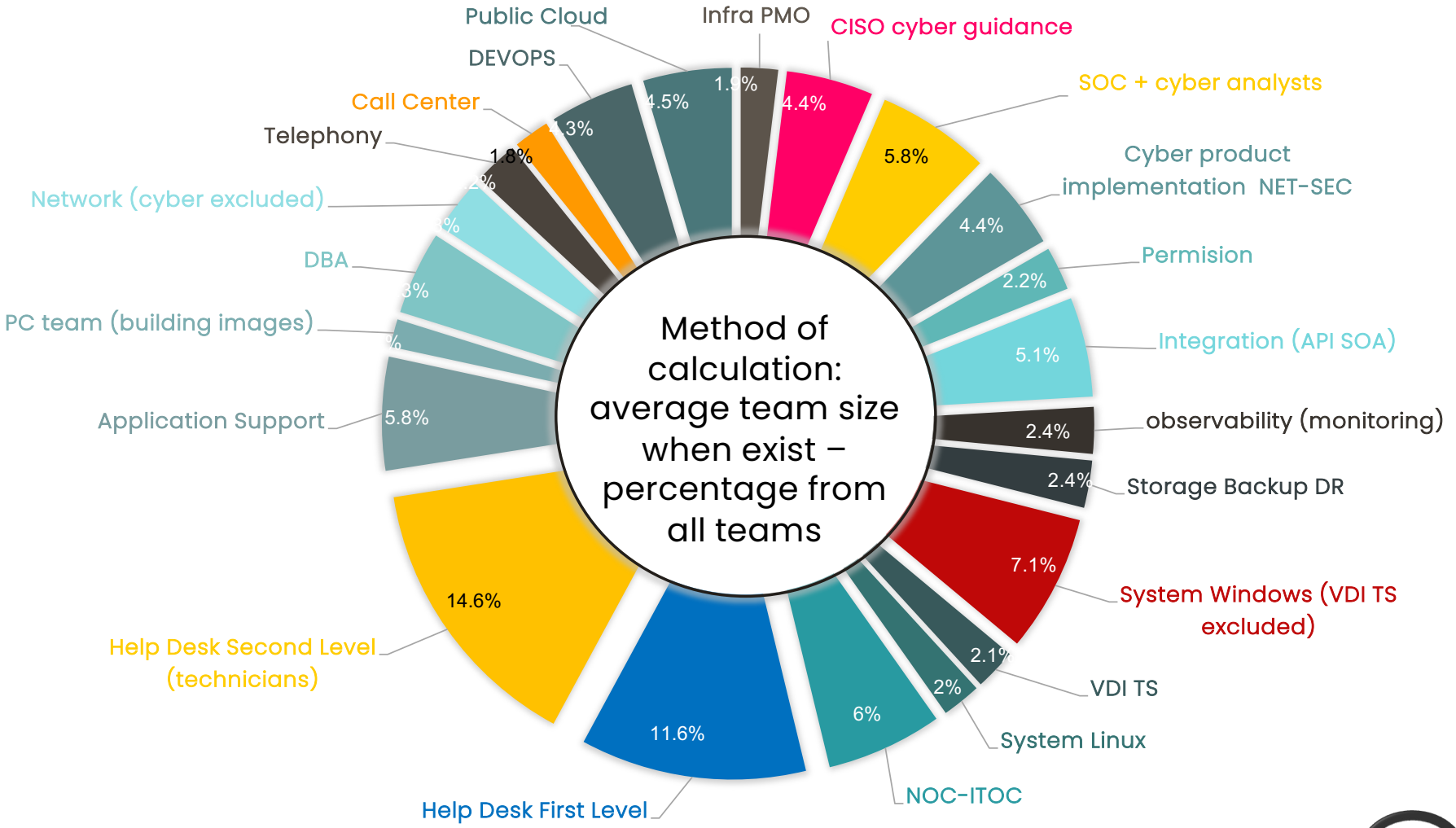
Number of company **employees** (using computers) per **IT staff member**

Source : STKI Research



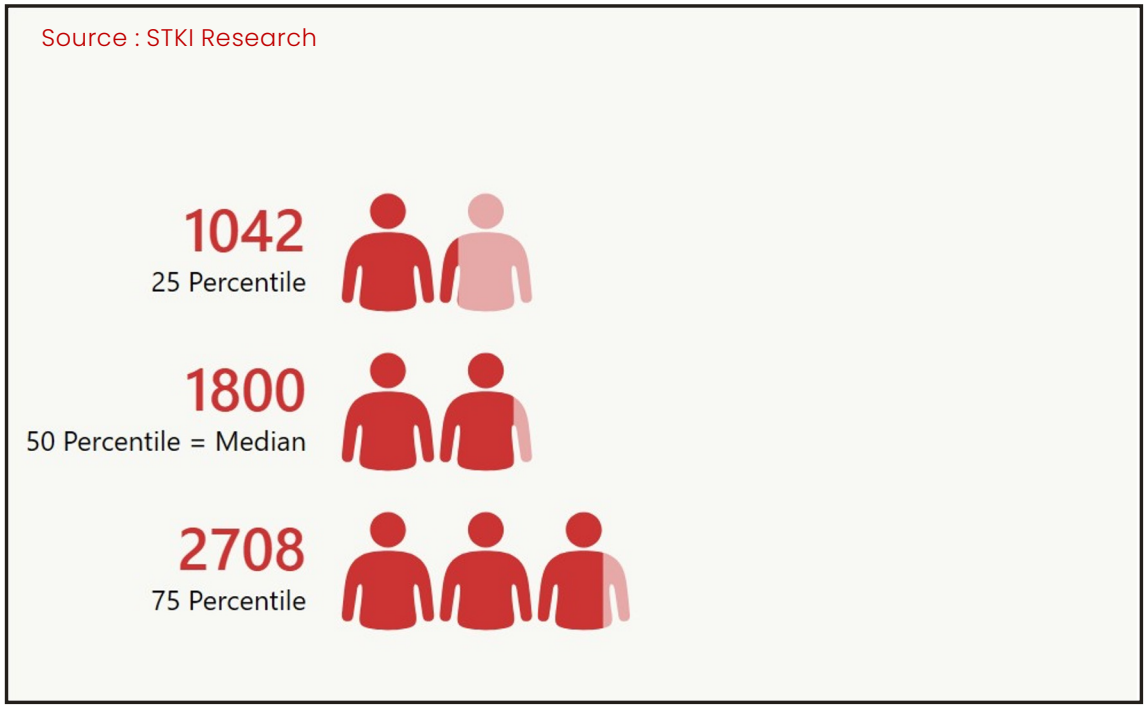
This does not include “partners” like external doctors in Health, insurance agents in Insurance, etc.

Infra-Ops-Cyber staff distribution



V2

Percent of **Infra-Cyber-Ops** from total **IT employees**



- Totals not including telephony call center , application support , software infrastructure (document management, forms, etc.), HATMAA, HPC, infra procurement,
- SIEM soc might be outsourced (fully or partly)

STKI.INFO

V2

Cyber budget from total IT budget in Israeli Enterprises

Source : STKI Research

6%
25 Percentile

10%
50 Percentile = Median

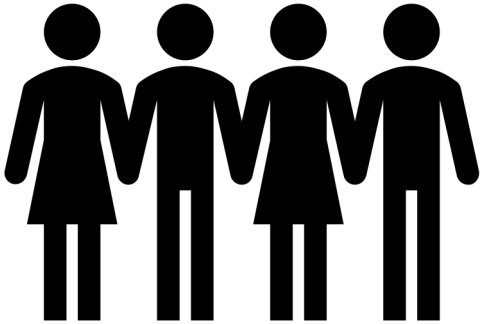
17%
75 Percentile

"Cyber" is defined differently - example - some CIOs consider patches to be part of cyber security, while others may not consider it to be part of cyber security

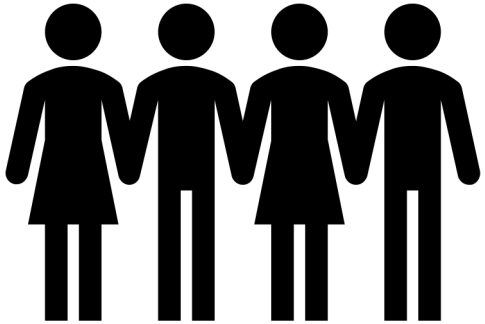
Sometimes cyber activities are funded by "regulations"

Organizations Increase their cyber budget over the years

The big divide

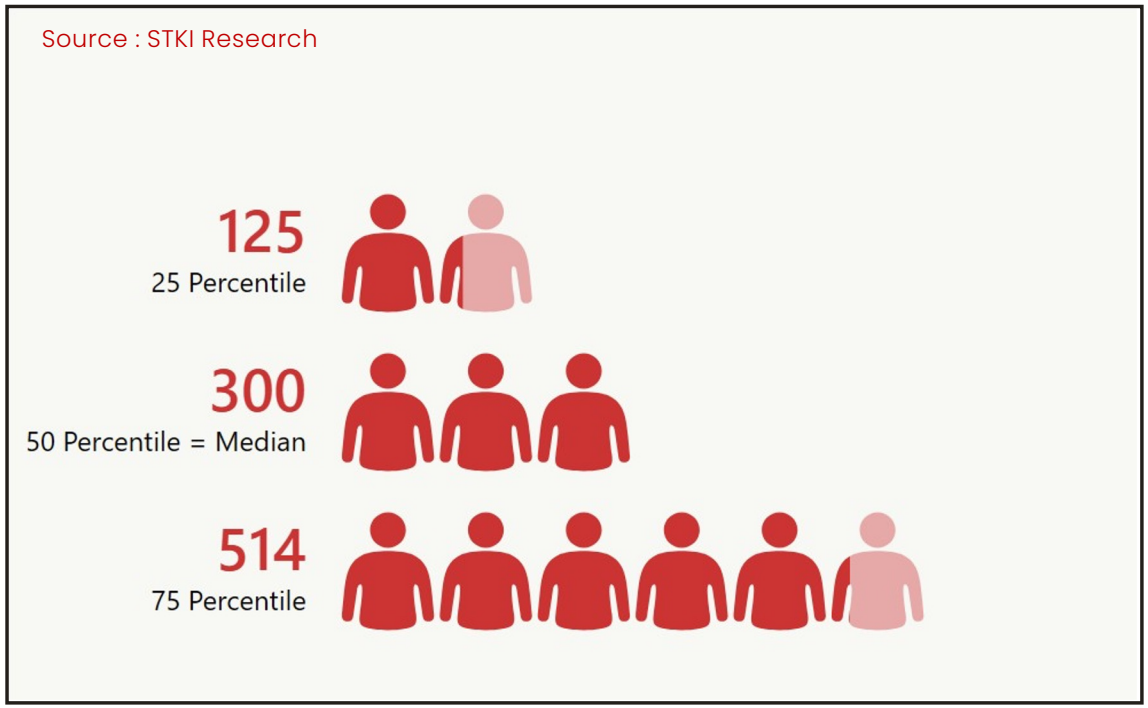


regulated / finance organizations

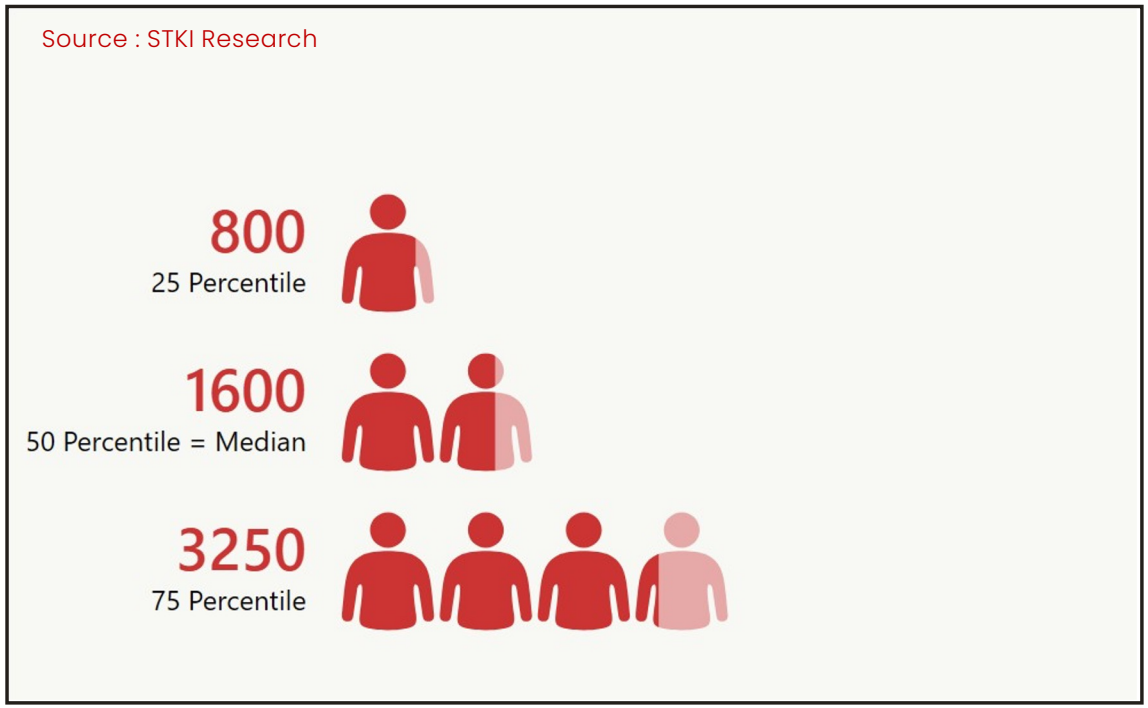


not regulated organizations

Number of Employees (using computers) per guidance department (CISO) staff member in regulated / finance organizations

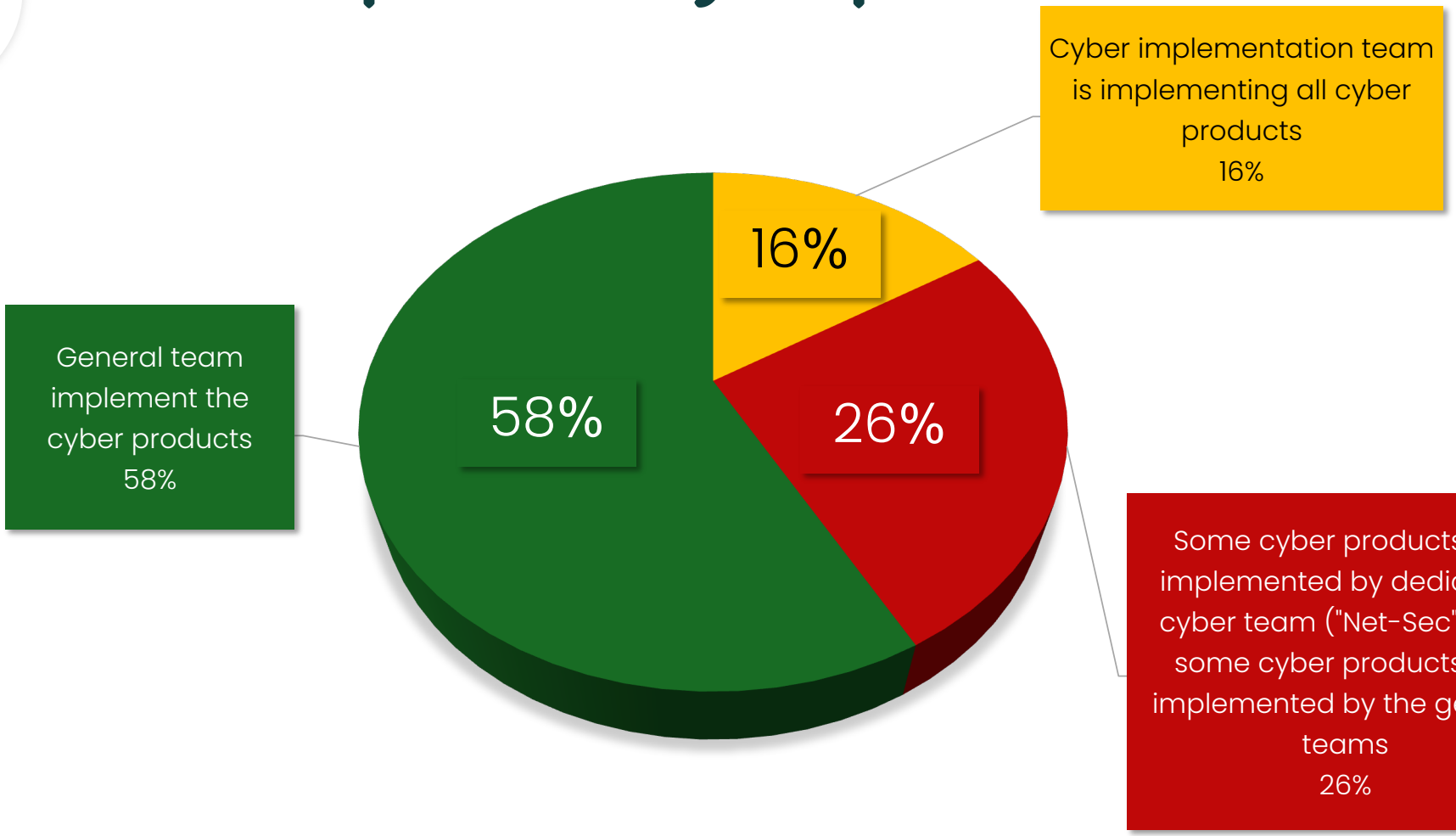


Number of Employees (using computers) per guidance department (CISO) staff member organizations not regulated



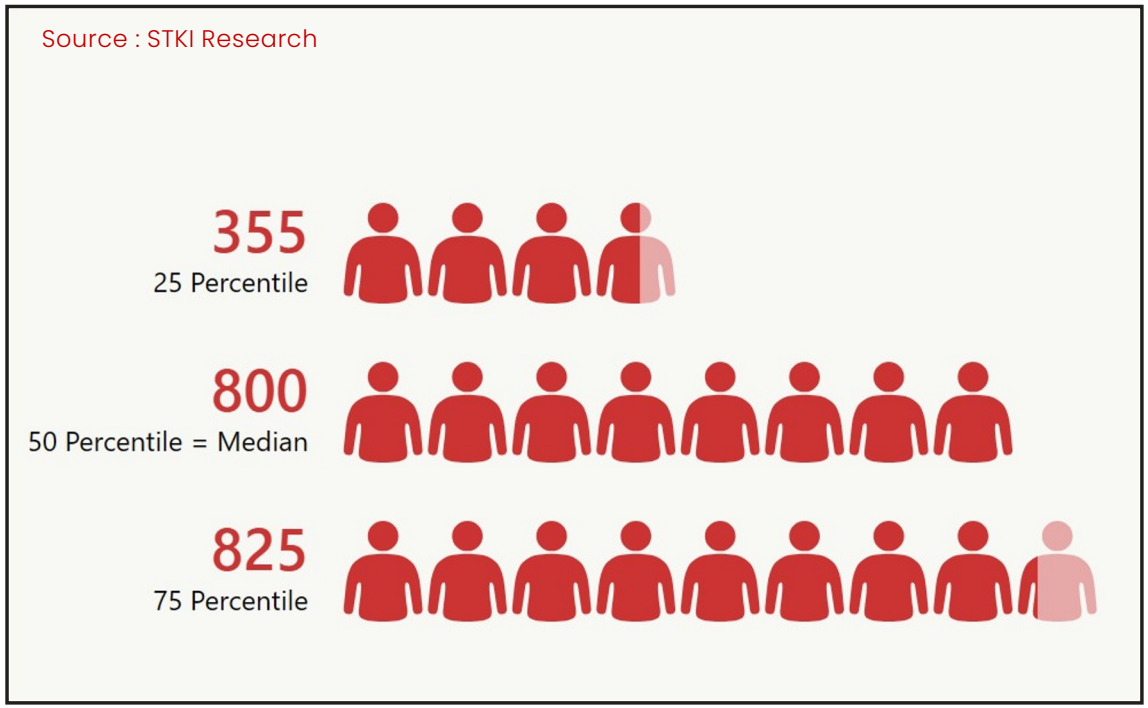
V2

Who implements cyber products?



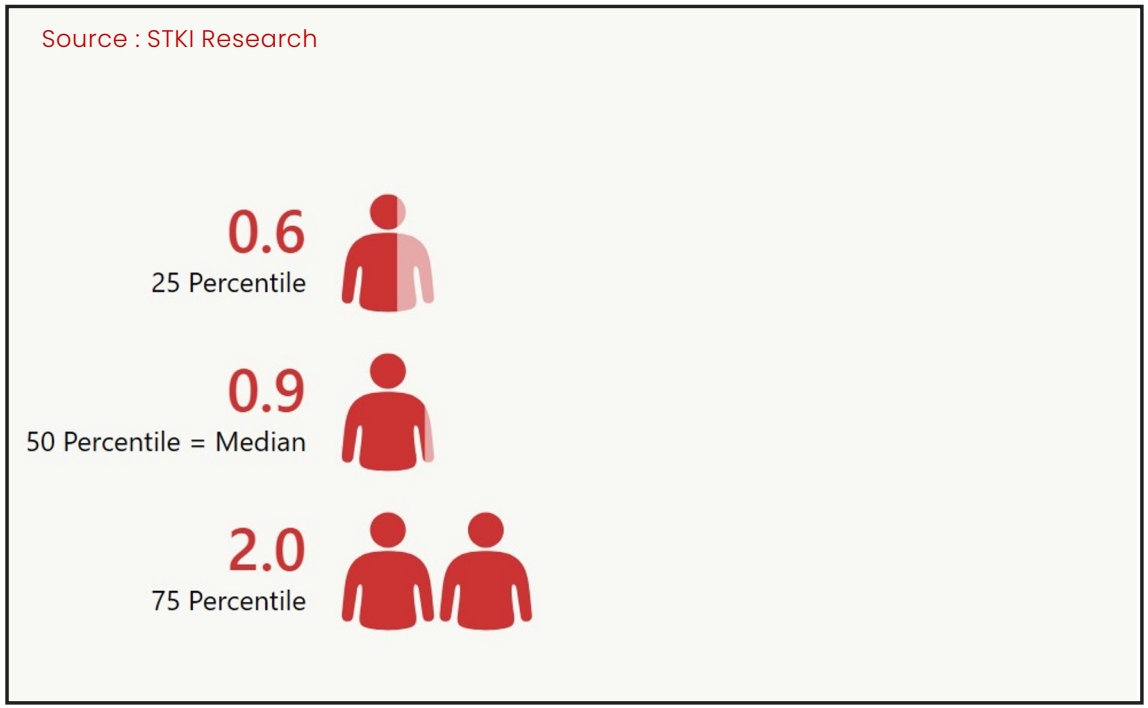
V2

Number of **production servers** (Windows+Linux) per **observability** (monitoring) staff member.



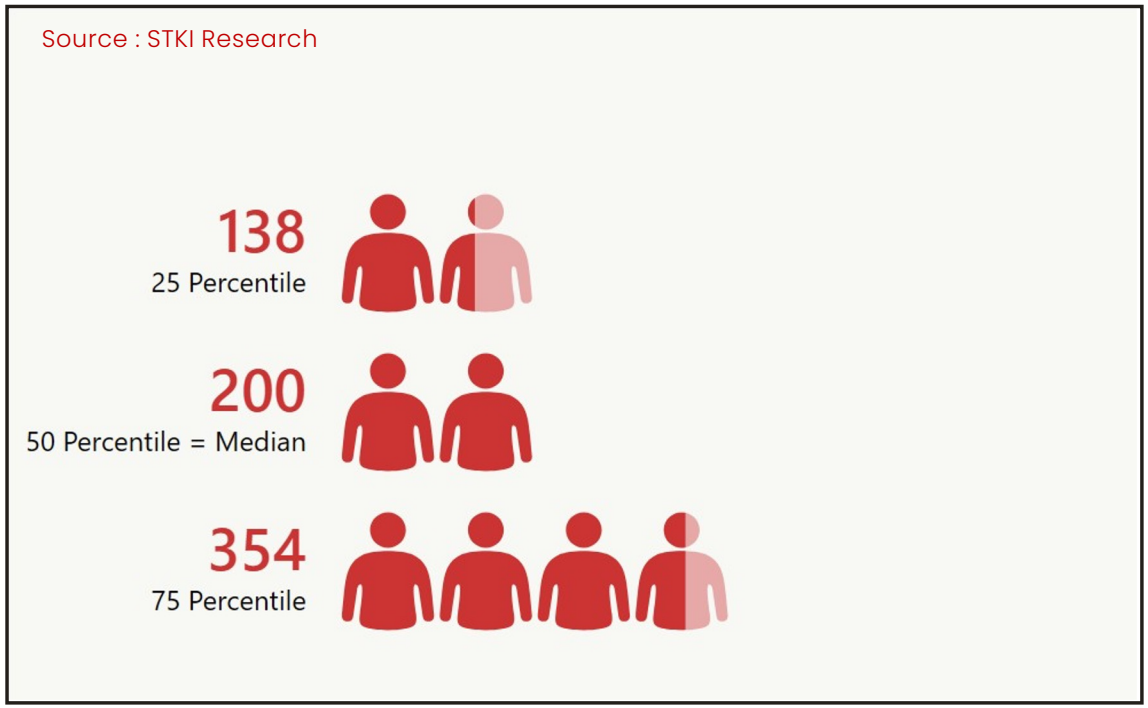
This is for building the observability maps not for looking at the maps (NOC ITOC)
Legacy servers are not counted (AS400 MF)

Petabyte volume usable storage per **storage** (+backup+DR) staff member



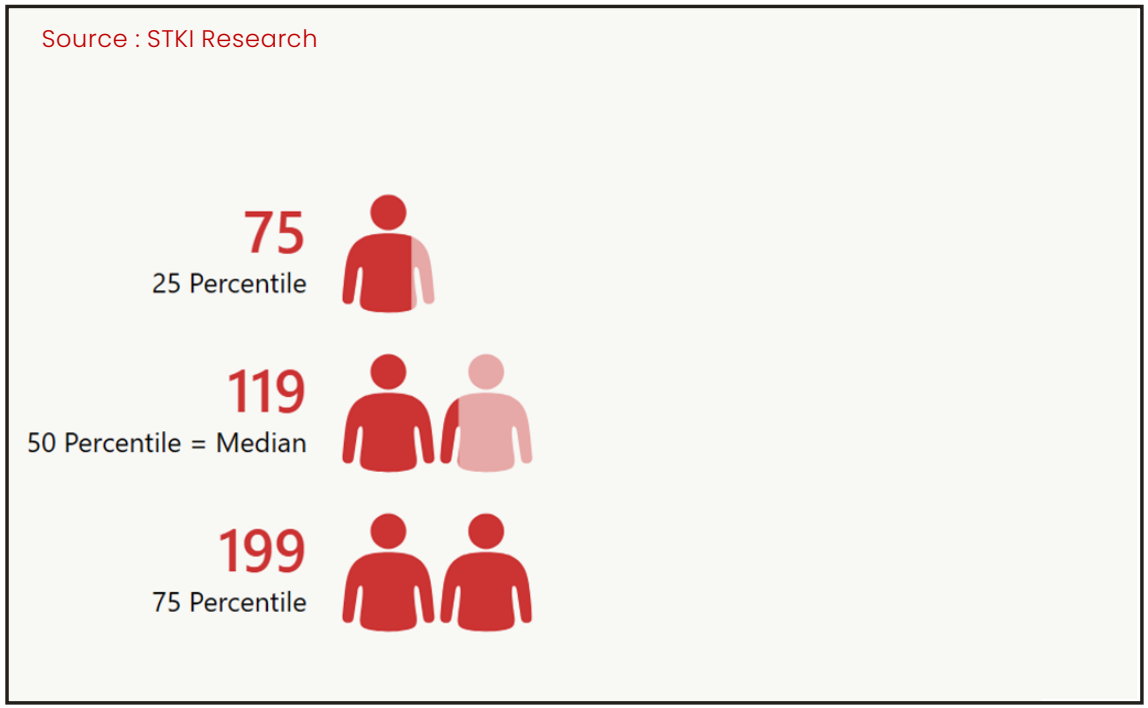
Q: “What is the usable storage volume – storage that OS can mount/access including HCI, DR storage, etc.?”

of **Windows servers** (all:prod+dev+test) per Windows system staff member



Windows team includes Windows servers, AD, exchange/365, VMWARE ESX VDI-TS

of **Windows servers** (production) per Windows system staff member



Windows team includes Windows servers, AD, exchange/365, VMWARE ESX VDI-TS

What percent from **Windows** team effort is dedicated to **cyber**?

Source : STKI Research

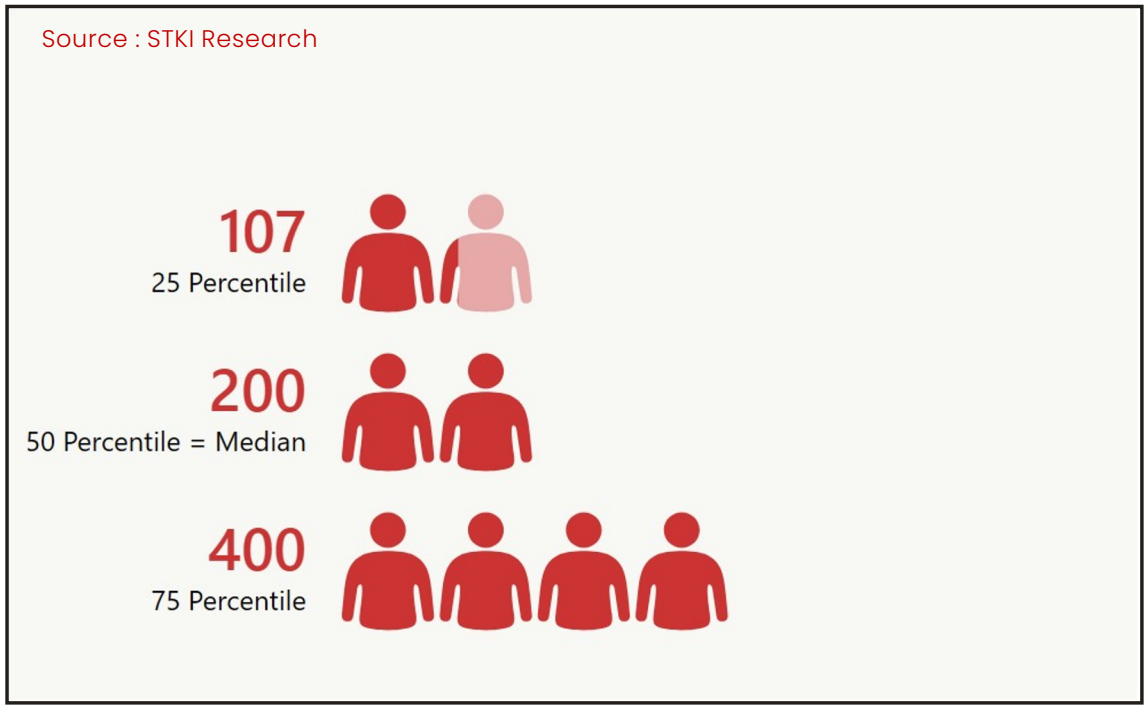
20%
25 Percentile

21%
50 Percentile = Median

34%
75 Percentile

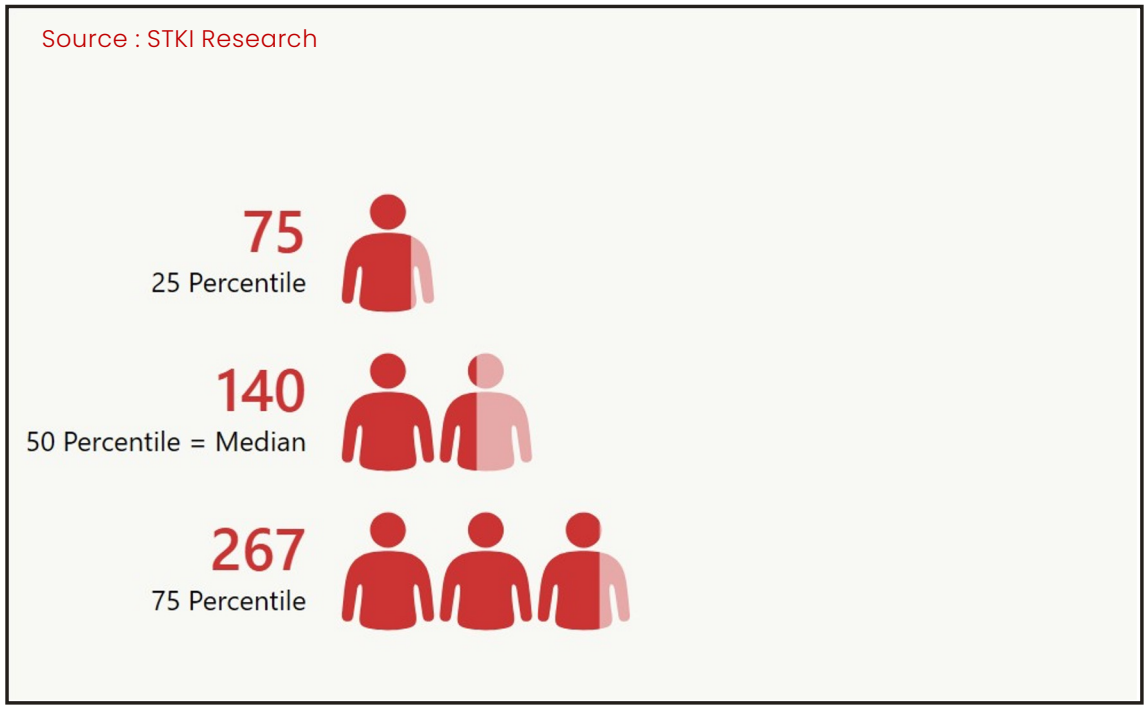
"Cyber" is defined differently - example - some CIOs consider patches to be part of cyber security, while others may not consider it to be part of cyber security

of **Linux** servers (all:prod+dev+test) per Linux system staff member



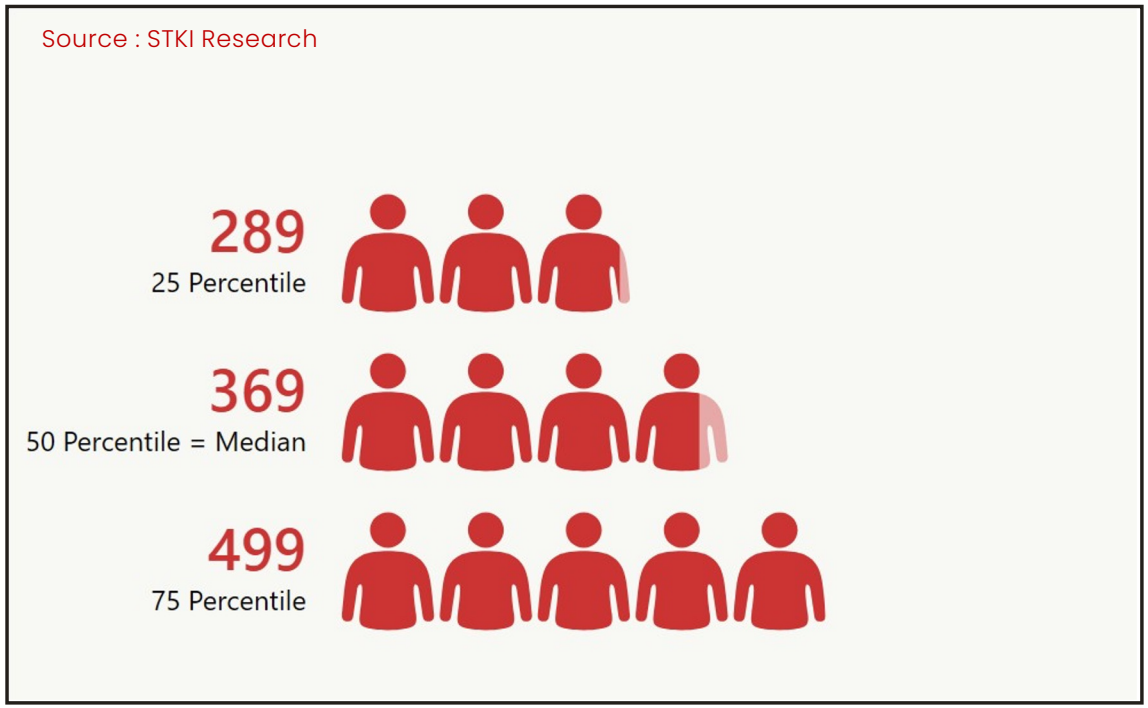
Linux server team is mainly only responsible for Linux servers

of production **Linux** servers per Linux system staff member



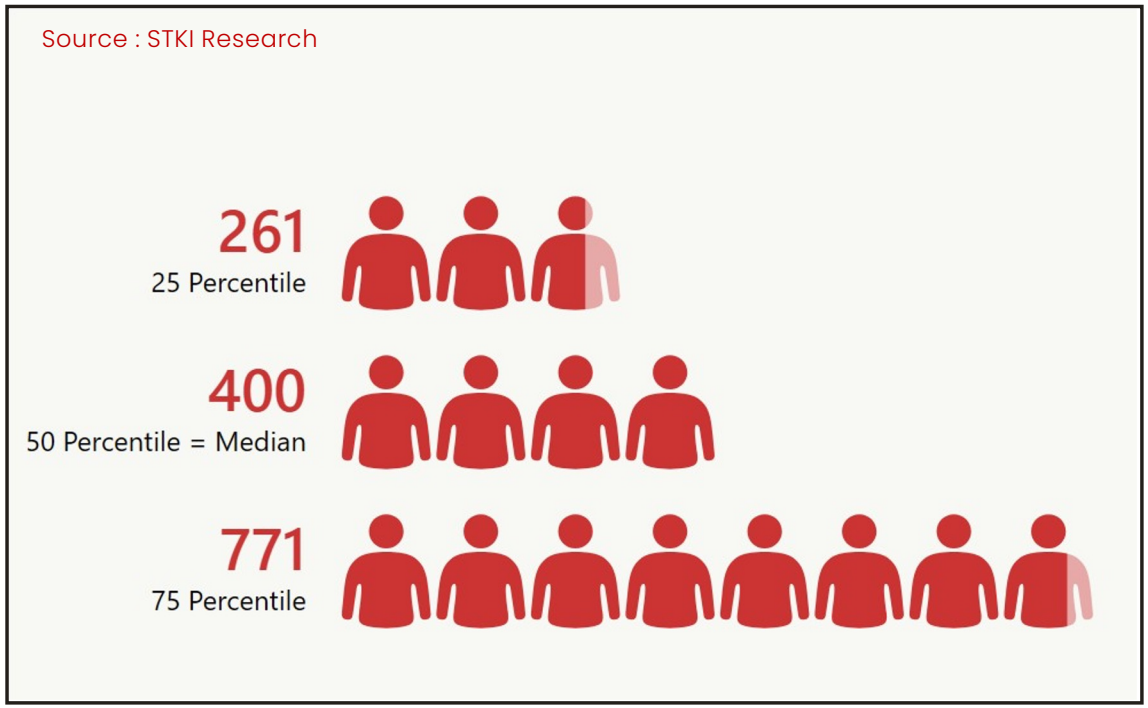
Linux server team is mainly only responsible for Linux servers

Devices (desktop, laptop, handhelds) per **first level support** member

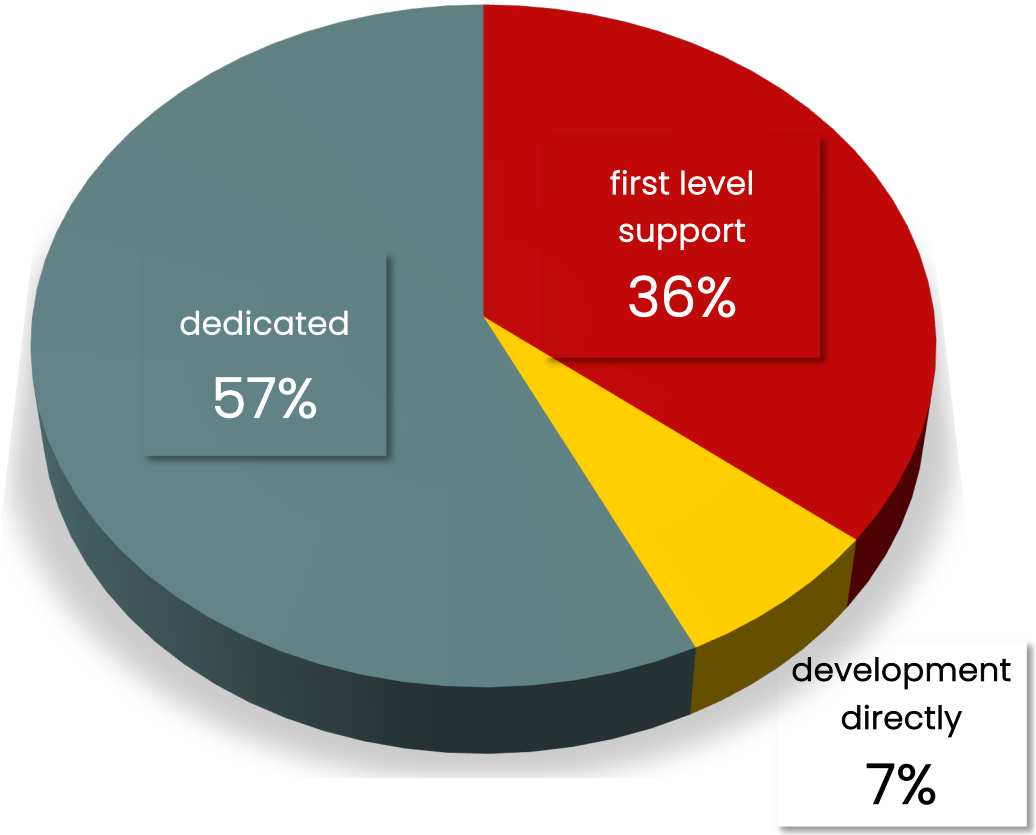


- Common metric – tickets per users is 1.2 per month (100 users will have 120 tickets per month)
- SOME times there are more employees than devices (working in shifts) and sometimes more devices than employees (several devices per employee up to 3 devices per employee)

Devices per second level support (**PC technicians**) staff member



Who gets the application related tickets?

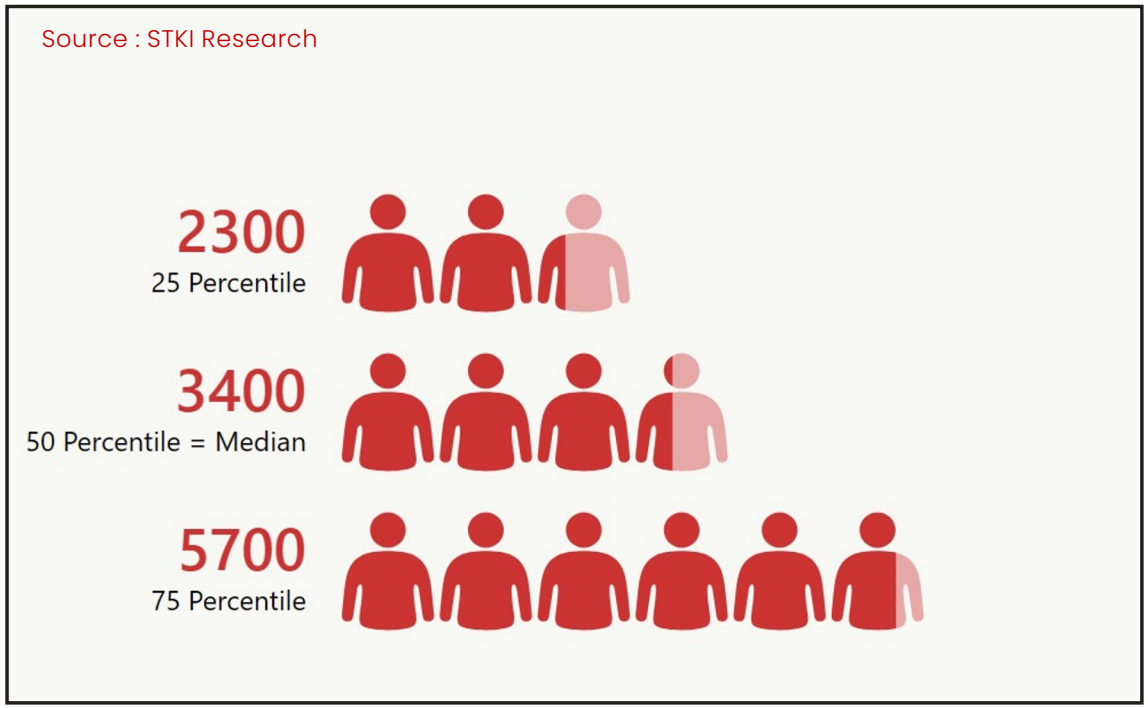


In most cases the first level support will answer all calls

In case the ticket is not solved by the first level support or dedicated team (if exists) it will always go to the development

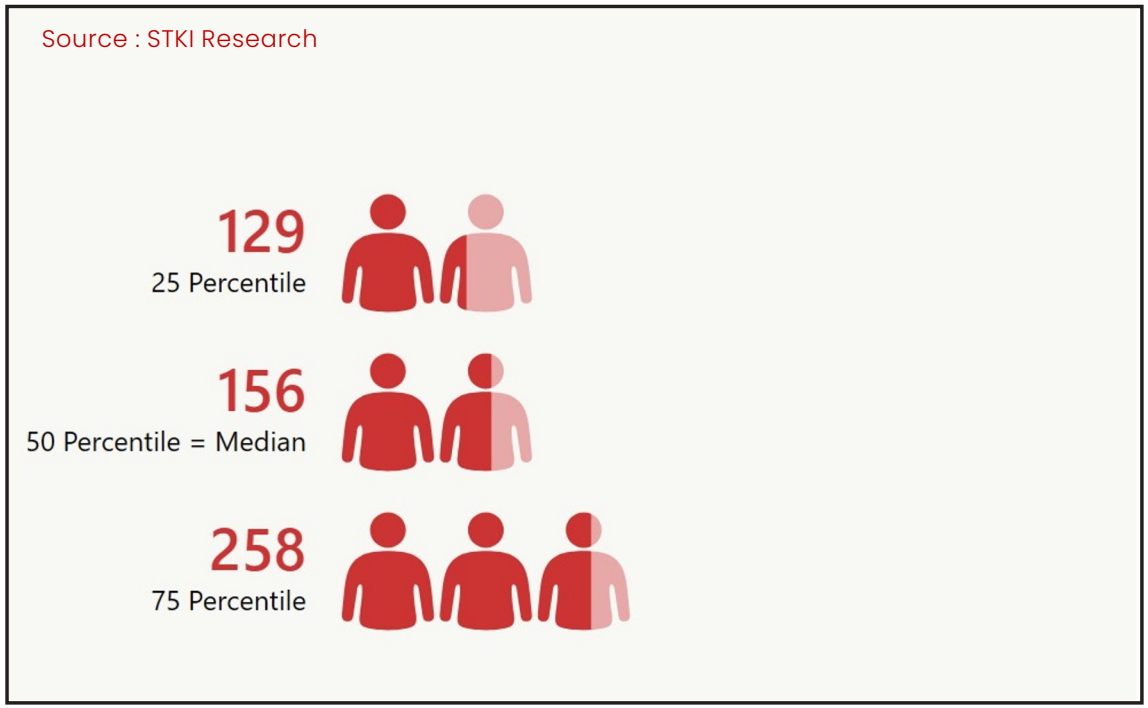
Sometimes the “dedicated application support team” is part of “applications” and of even the business unit and not part of infra-ops

Number of **devices** per 3rd level support staff member (**creating the PC image**)

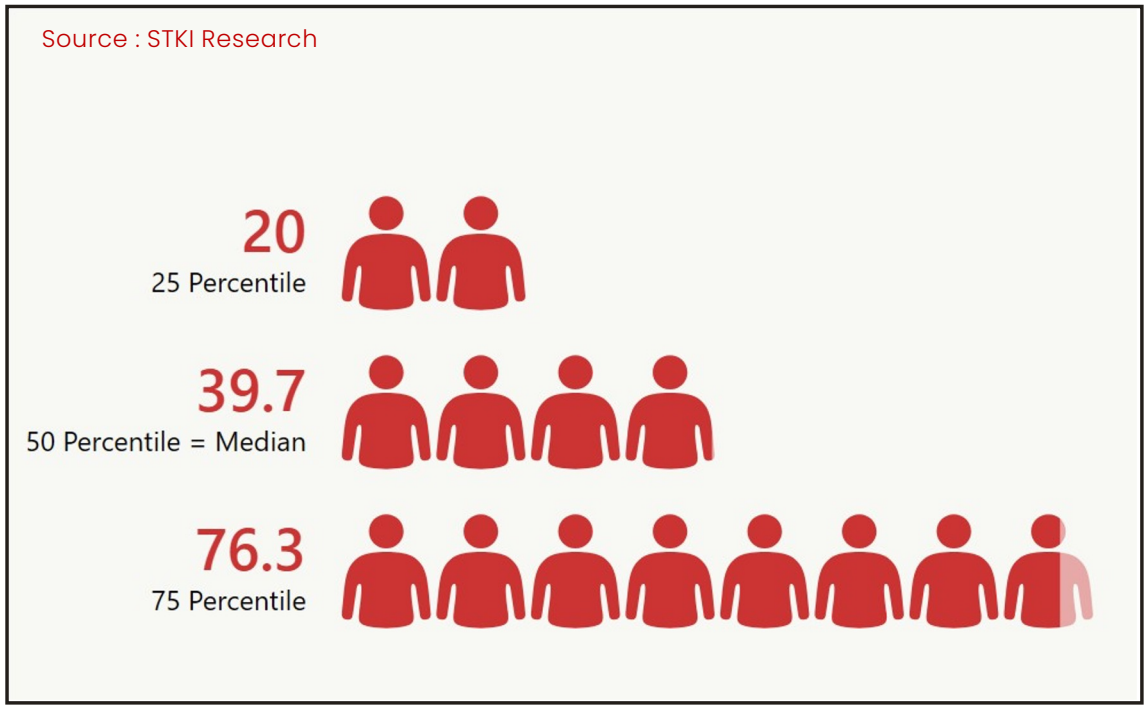


of devices (PC laptops handhelds) per total support staff member

(1st +2nd +3rd) not including application support



of **applications** per **DBA** staff member

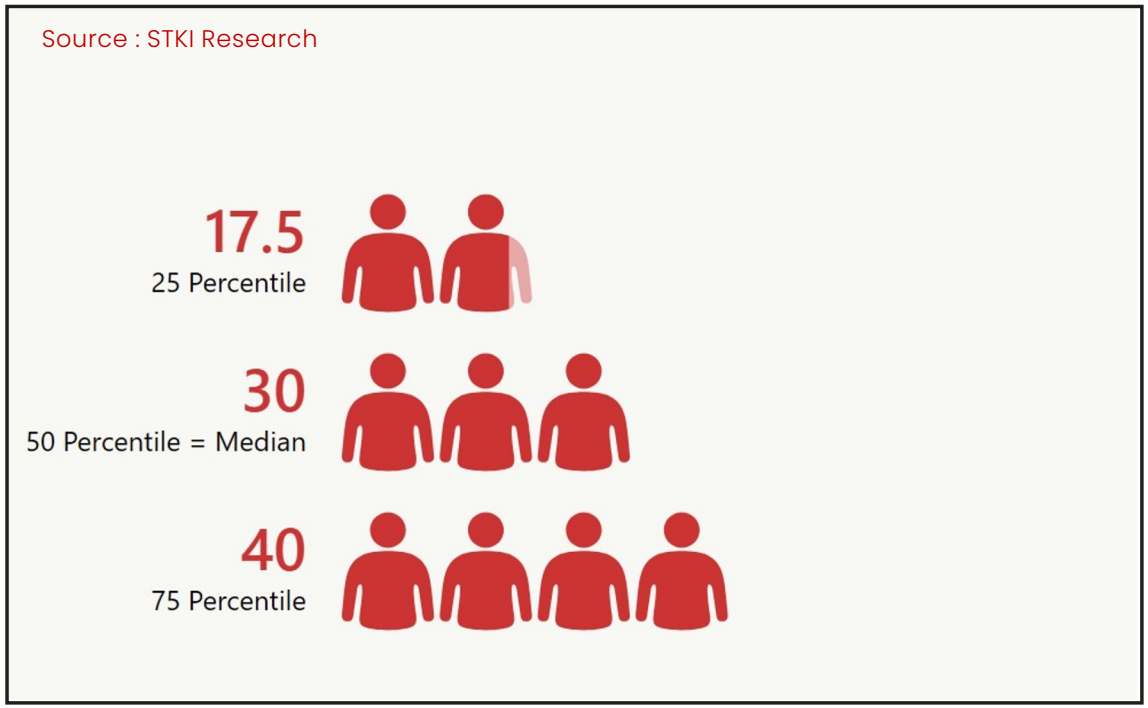


All application are counted “big” and “small”

Sometimes DBA are responsible for general data infrastructure (“Splunk”, “Elastic”) this lowers the ratio

ADBS + Infra DBA

of **developers** per **DBA** staff member

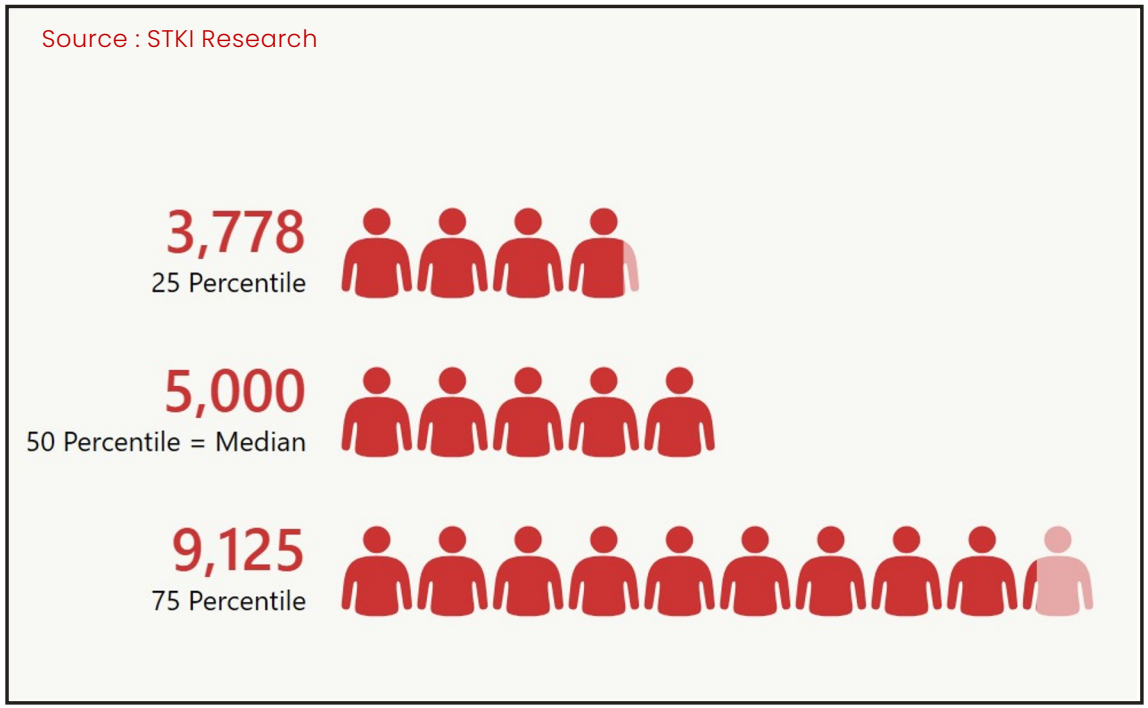


DBA give support for “packages” or “application that are developed by outside contractors” hece the developers are not counted

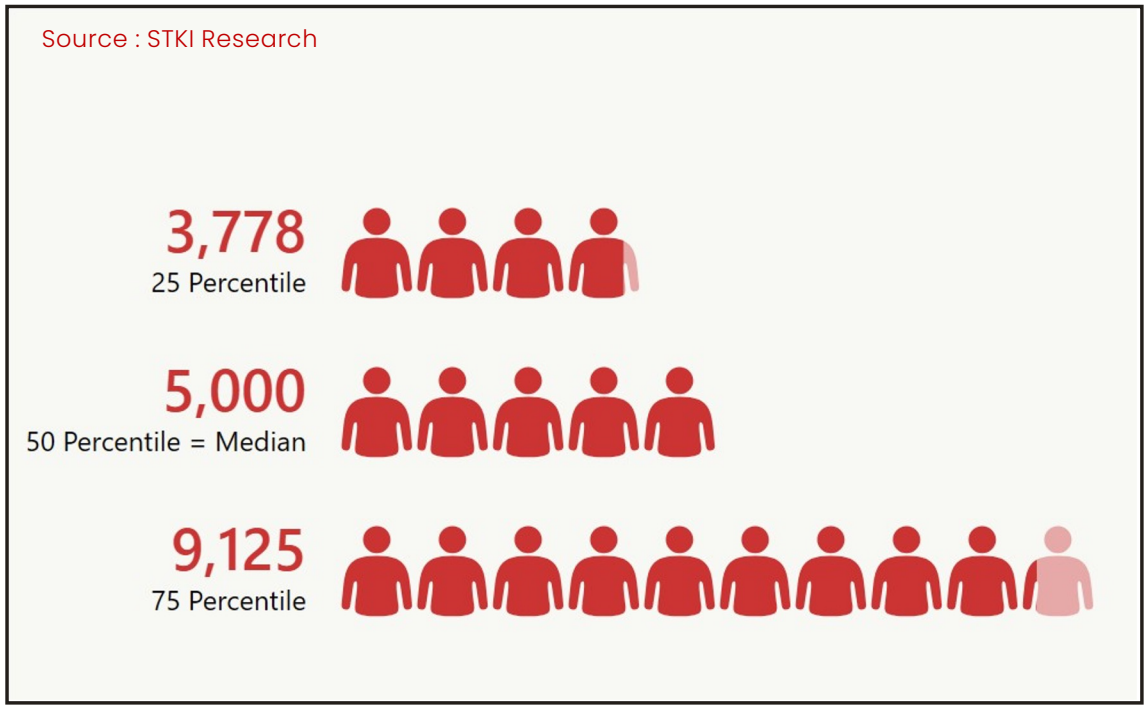
Sometimes DBA are responsible for general data infrastructure (“Splunk”, “Elastic”) this lowers the ratio

ADBS + Infra DBA

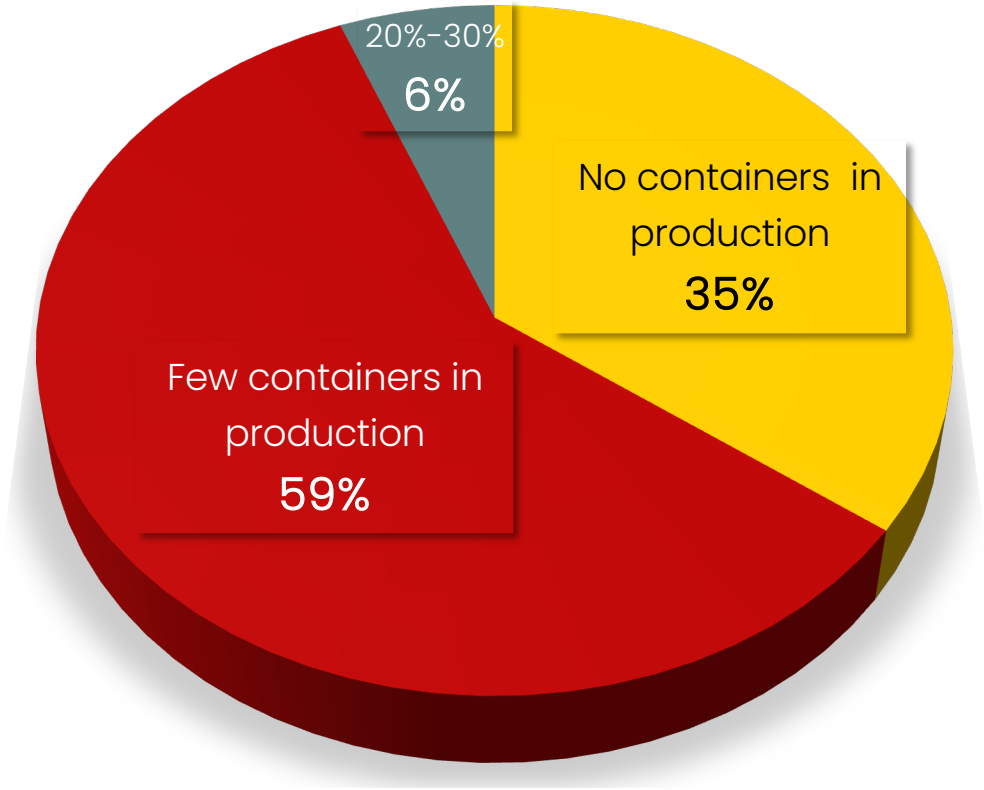
Hot ports (connected) per **network staff member** (cyber effort not included)



Hot ports (connected) per **network staff member cyber** effort (either net-sec, network or cyber implementation team members)

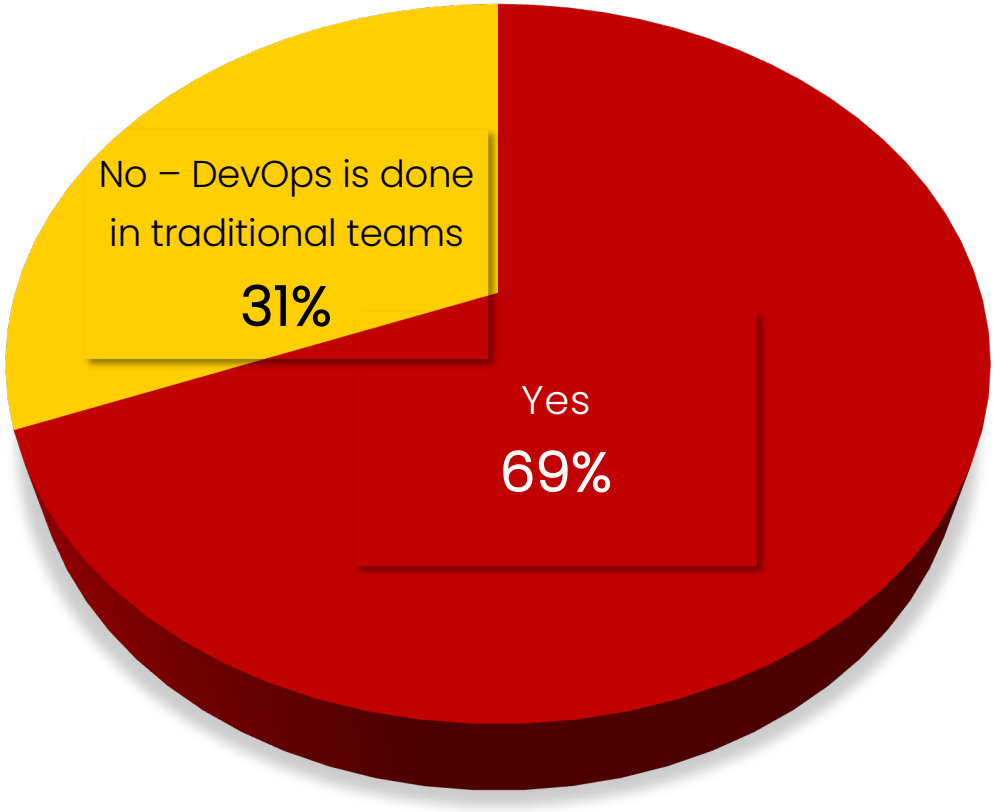


Percent of production system based on **containers**



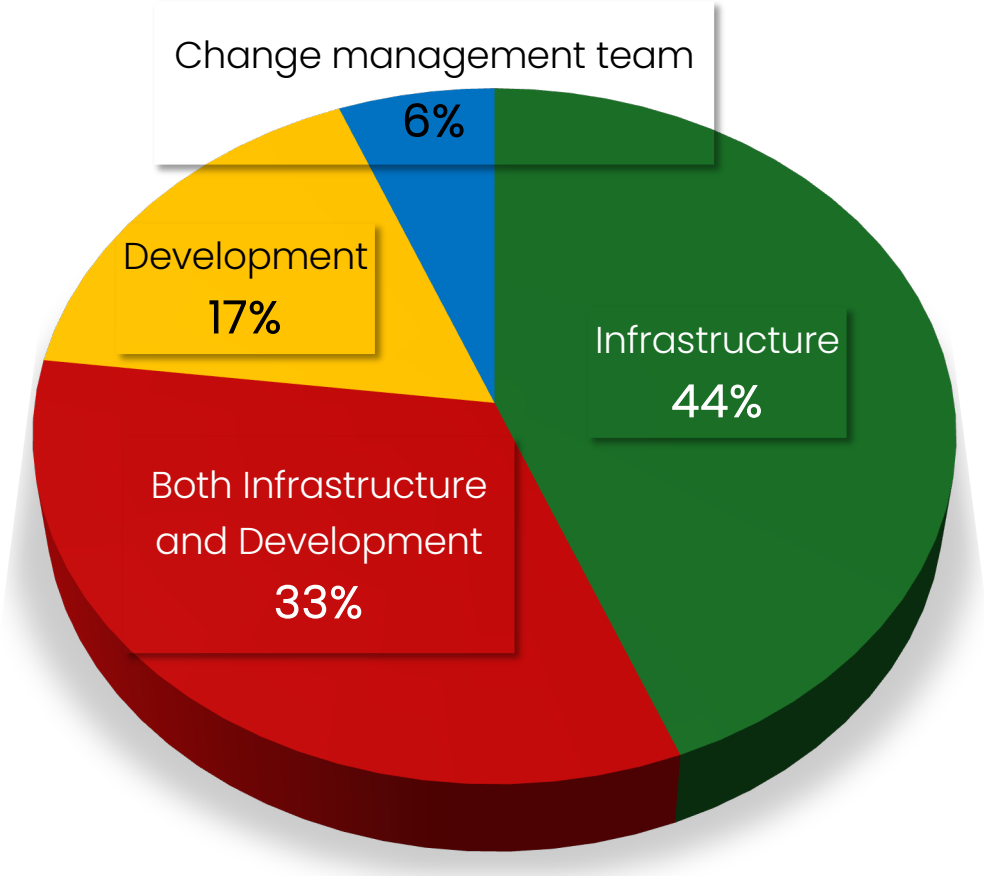
OEM) products (based on continaers are not included

Is there dedicated **DevOps** team?

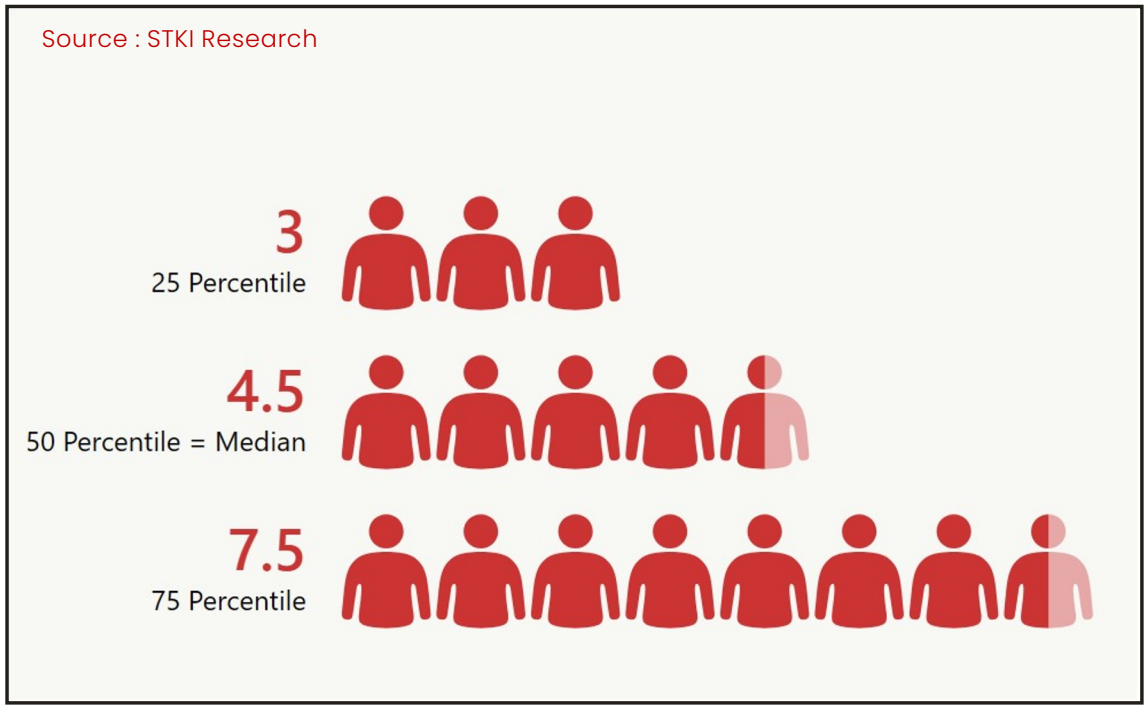


Even if DevOps team exist - not all DevOps related effort is done in this team

DevOps team reporting structure



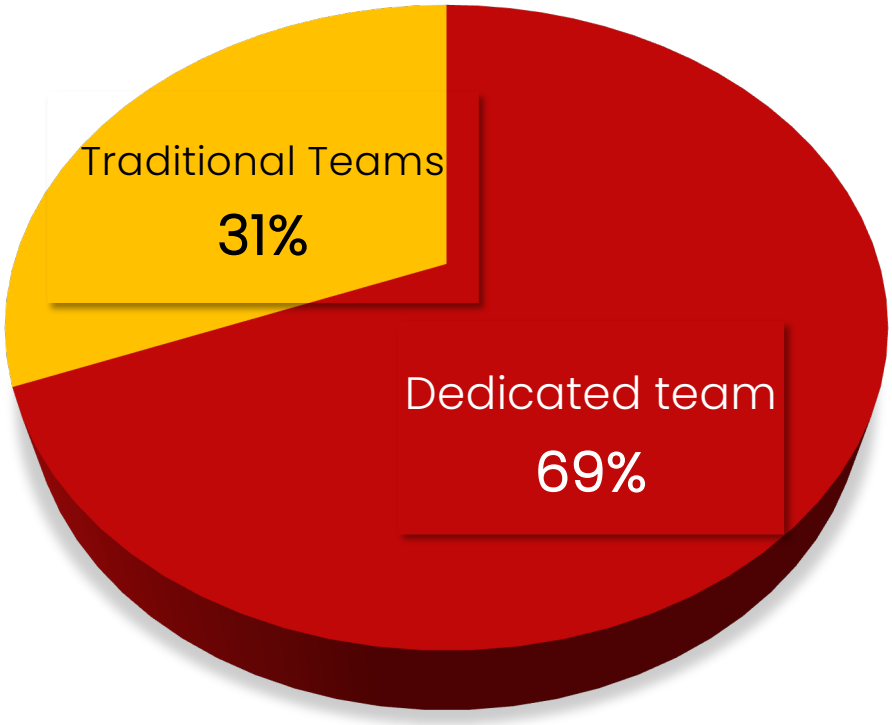
How big is the **DevOps** team



Devops is "app DevOps" (pipelines), infra DevOps (IaC) or both

sometimes DevOps is part of "Cloud"

Cloud effort is done in (percent)



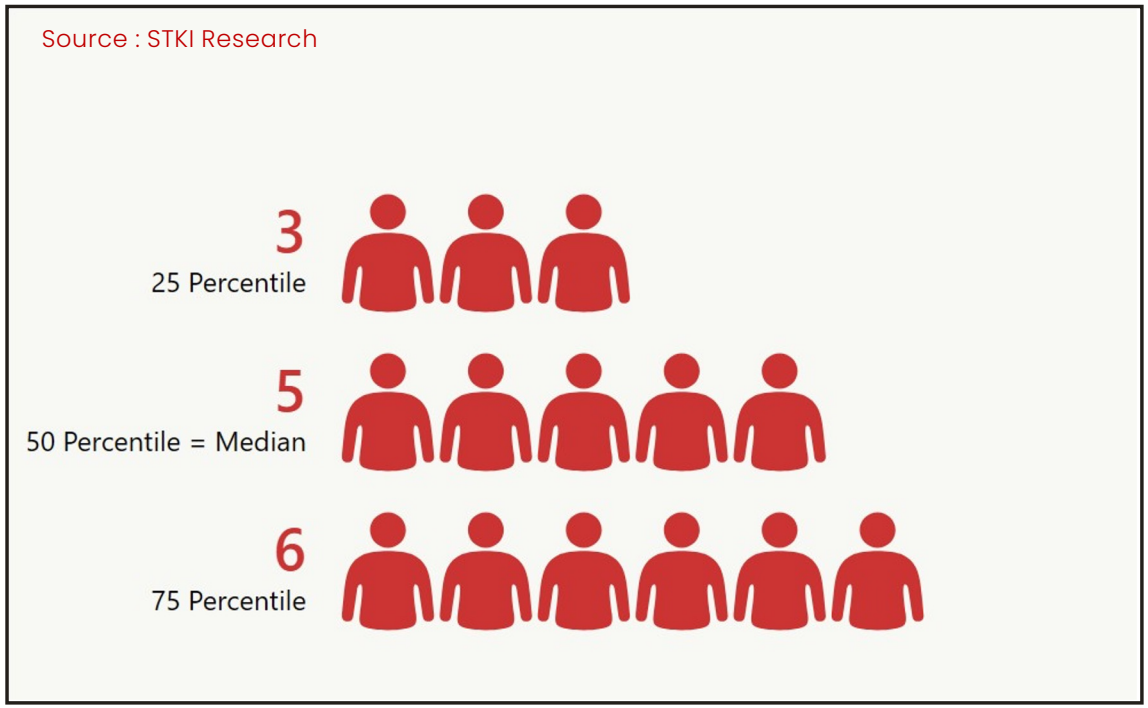
Sometimes cloud is part of devops ,

Sometimes devops is part of cloud

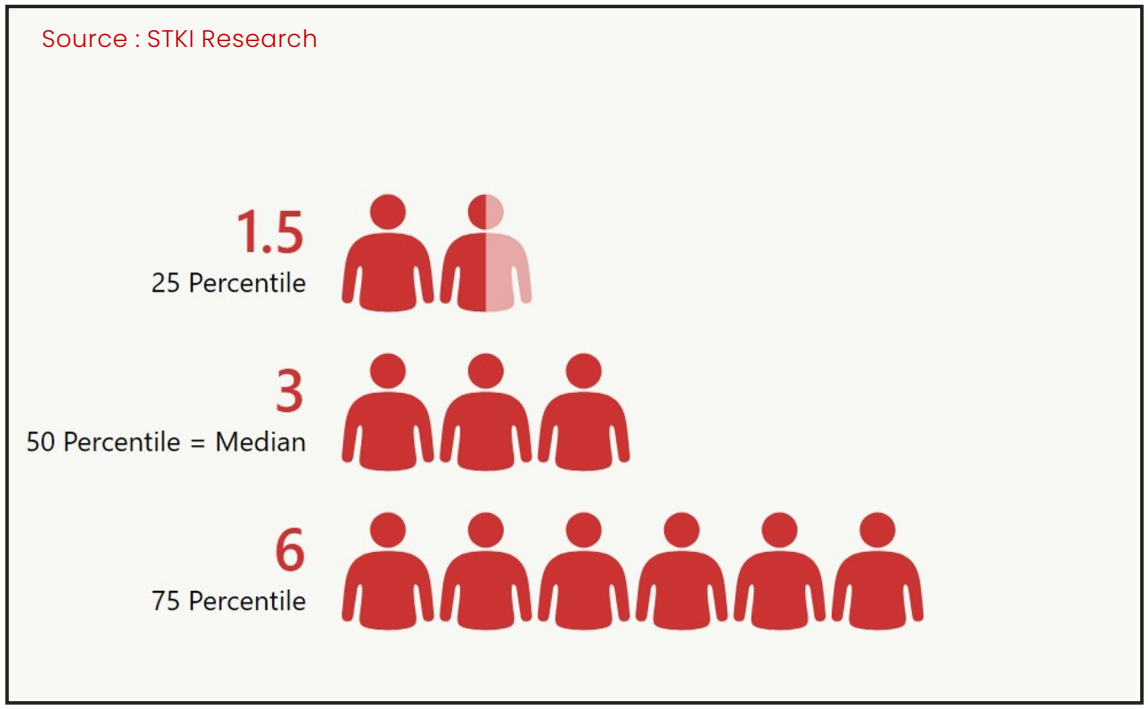
Sometimes devops=cloud

Size of public **cloud** team

Source : STKI Research

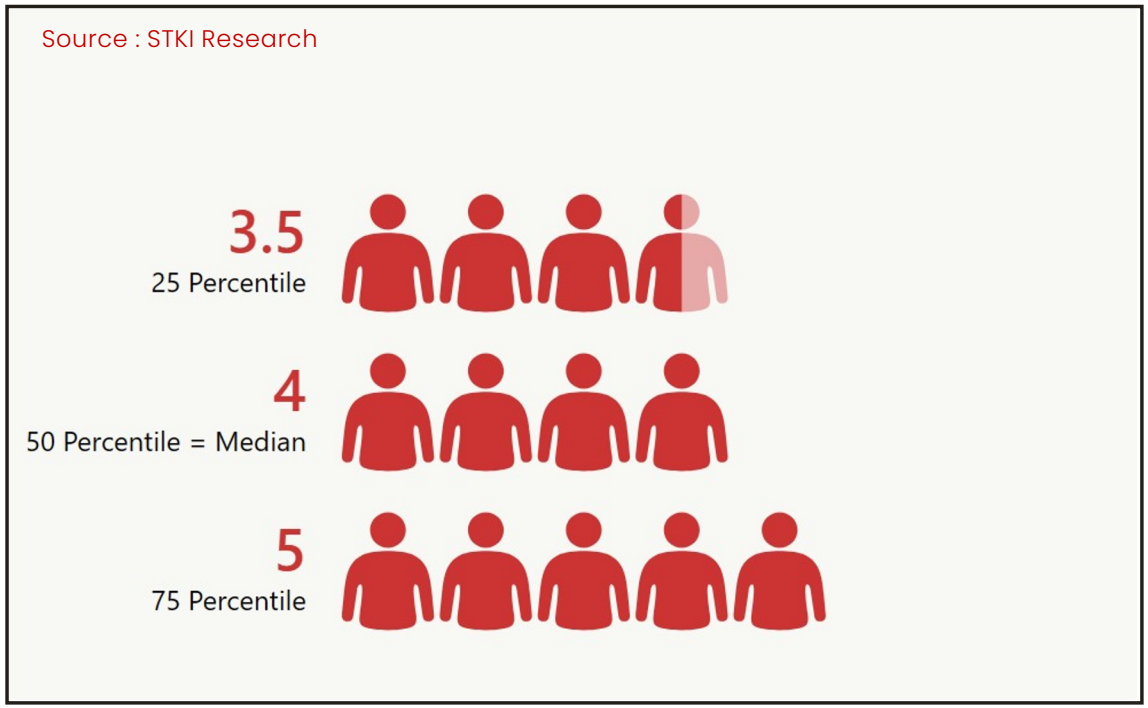


SAP **basis** personal



SAP **basis** personal per SAP **module**

Source : STKI Research



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STKI Research Team

V2

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