



# DevSecOps Day EMEA

Unlock 2024

**The Next-Gen**

**Software Supply Chain**

Micheline Nijmeh, CMO

@JFrog



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ARE YOU READY **FOR NEXT?**

**TOMORROW IS NOW**

# ARE YOU READY **FOR NEXT?**



A world where  
**SOFTWARE IS LIQUID**



DevOps & Security  
**ARE ONE**



AI & MLOps all the way  
**TO THE EDGE**

# TOMORROW IS NOW

# ARE YOU READY **FOR NEXT?**



From “best of breed” to  
**A PLATFORM**



Hybrid &  
**MULTI-CLOUD**



Binaries are the  
**PRIMARY ASSET**

# TOMORROW IS NOW

# PLATFORM vs BEST OF BREED



*We believe that*  
**PLATFORM CONSOLIDATION**  
*will be a key theme*  
*for 2023*



TRUIST 



*In 3 years,*  
**THE MAJORITY OF THE MARKET**  
**WILL CONSOLIDATE**  
*the number of vendors utilized*  
*for the automation category*



Morgan Stanley



*CIOs indicate that they are*  
**LOOKING TO CONSOLIDATE**  
*with a SMALLER NUMBER OF*  
**VENDORS**



KeyBanc  
Capital Markets  


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# DEVOPS & SECURITY ARE ONE

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**SECURITY REMAINED**  
**The top priority**  
*with 67% expecting increased*

PIPER | SANDLER

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**SECURITY SOFTWARE REMAINS**  
**TOP OF MIND FOR CIOS,**  
**with 4 of the top 5**  
*software-specific spending priorities*  
*security-related in 2Q23*

Morgan Stanley

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**SECURITY**  
*Ranked highest and saw the*  
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# HYBRID & MULTI-CLOUD

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The majority of CIOs  
**EXPECT TO USE A MIXTURE**  
**of deployment options**  
**including on-prem**  
**and multiple clouds**  
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Morgan Stanley

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Cloud security & NDR  
**SAW THE LARGEST POSITIVE**  
**SHIFTS**  
in expectation  
vs the beginning of year  
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PIPER | SANDLER

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Many companies are  
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# AI OR DIE

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**75% of CIOs**  
*expect to see an increasing priority*  
*In data and analytics*  
**POWERED BY AI**  
**in the next 12 months**

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**KeyBanc**  
Capital Markets  


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**56% of CIOs**  
*say recent innovations in*  
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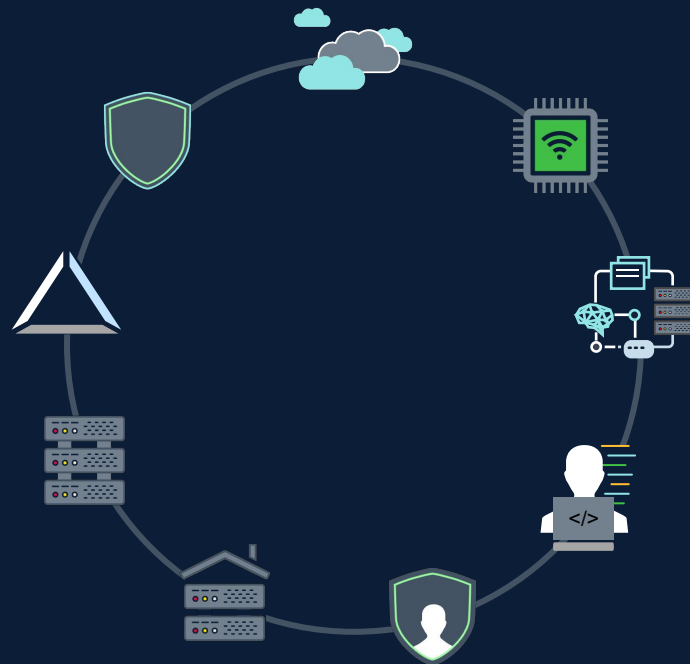

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# WHAT IS COMMON IN ALL THESE “NEXT”?



THE **SOFTWARE SUPPLY CHAIN FLOW** IS THE **FLOW OF BINARIES**



YOU GOT US  
**READY FOR NEXT**



DevSecOpsDay  
EMEA **Unlock 2024**



# NOW

IT'S **YOUR** TURN

DevSecOpsDay  
EMEA **Unlock 2024**