



ISRAEL'S SMART MOBILITY | 2025 INDUSTRY

Transforming the Future
of Transportation

INDUSTRY REVIEW

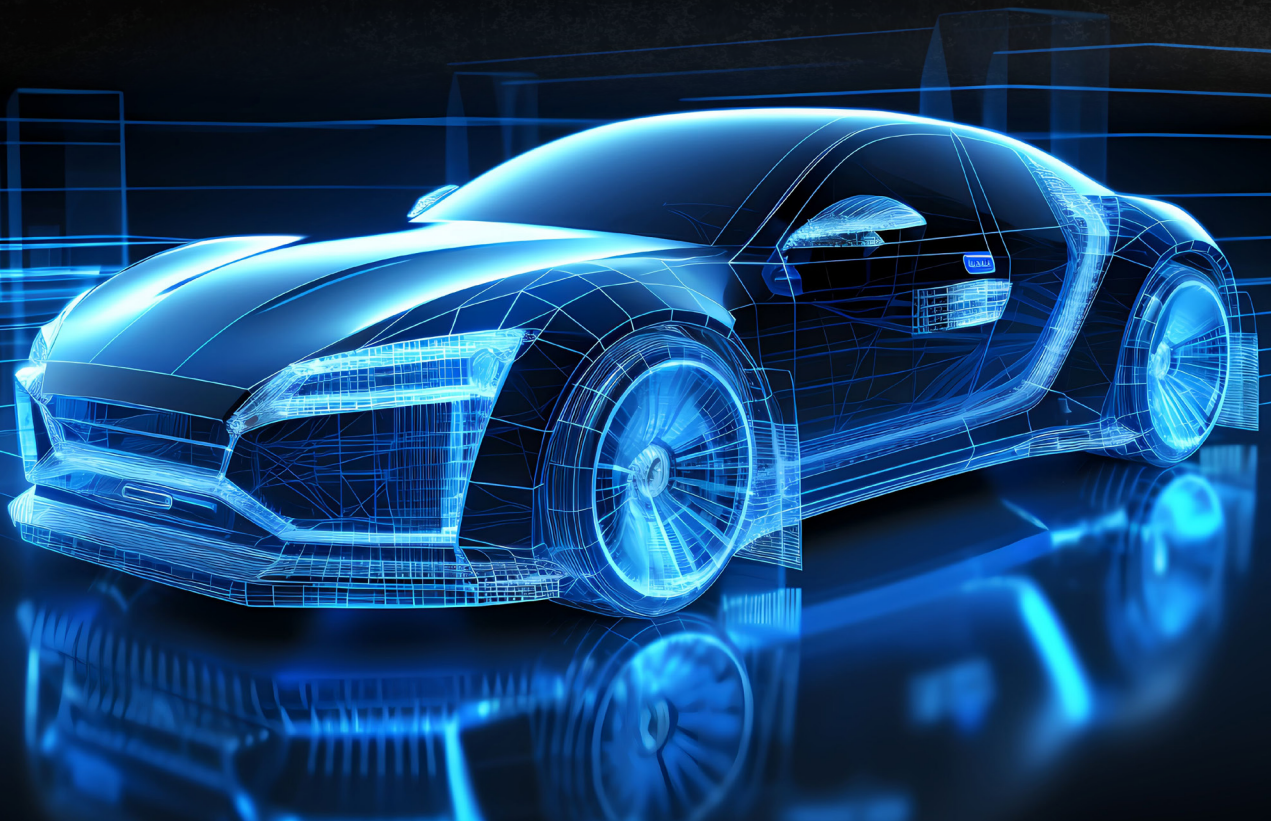


Table of Contents

I-VIA	3
Executive Summary	4
Introduction	5
Smart Mobility	6
Israel – A Global Hub for Smart Mobility	6
Redefining the Road Ahead: Evolution Toward Software-Defined Vehicles	7
Transformation of Automotive Components:	
Electrification and Autonomous Driving	8
Electrification and Energy	8
Autonomous and Connected Vehicles (CAVs)	11
Annex A: List of Notable Israeli Tech Companies – Energy and Electrification.....	15
Annex B: List of Notable Israeli Tech Companies – Autonomous and Connected	16
Bibliography	20



I-VIA

I-VIA, The Israel Vehicle Importers Association, as a member of the global organizations OICA, the International Organization of Motor Vehicle Manufacturers, and CLEPA, the European Association of Automotive Suppliers, acts as a bridge between traditional automotive industries and the rapidly evolving landscape of smart mobility.

I-VIA is at the forefront of facilitating the transformation toward sustainable and innovative transportation solutions and actively collaborates with international stakeholders. These partnerships enable the association to integrate global automotive standards with Israel's innovative ecosystem, creating a two-way channel for knowledge exchange and technological advancement.

Beyond its local impact (representing direct vehicle importers in Israel in legislative and regulatory matters, enhancing professional capabilities, and fostering growth within Israel's

automotive sector), I-VIA plays a pivotal role in showcasing Israeli smart mobility technologies on the global stage.

The association works closely with international manufacturers, suppliers, and tech innovators to identify collaboration opportunities that drive progress in electrification, autonomous mobility, and software-defined vehicles.

Through its initiatives, I-VIA not only advances the adoption of cutting-edge technologies but also addresses broader societal goals, including enhancing cybersecurity in the automotive industry to protect against cyber threats in increasingly connected vehicles, improving road safety, reducing environmental impact, and supporting community projects.

The association invites global automotive leaders to partner with Israel's vibrant smart mobility sector, leveraging its unparalleled network and insights to navigate the future of transportation.

EXECUTIVE SUMMARY

Israel has emerged as a global powerhouse in smart mobility innovation, establishing itself as the fourth-largest mobility startup hub globally, after the United States, China, and the UK. With 724 active companies in the automotive technology sector as of 2023—double the number from 2020—Israel leads the world in mobility investment per capita and as a share of GDP. Since 2010, Israeli mobility companies have raised over US\$30 billion, attracting investments from major global automotive manufacturers. Major acquisitions of Israeli companies by global automotive players underscore the country's strategic importance in the global automotive ecosystem.

The industry is experiencing two major transformative shifts:

Software-Defined Vehicles (SDVs):

The automotive industry is transitioning from hardware-centric to software-driven vehicles, with software costs expected to grow from less than 10% of vehicle Bill of Materials (BOM) to 50% by 2030. This shift is driving OEMs to seek partnerships with technology companies and establish independent R&D divisions.

Electrification and Autonomous Driving:

These technologies are projected to comprise 52% of the total automotive market size by 2030, while conventional components will decline to around 11%. Israeli companies are at the forefront of both sectors:

■ The electrification and energy sector comprises 17% of Israel's smart mobility industry (123 companies)

■ Autonomous and connected mobility represents 26% of the industry (188 companies), receiving the highest amount of funding

As the automotive industry navigates this transformative period, engagement with Israel's smart mobility ecosystem has become a strategic imperative for OEMs and Tier 1 companies. The Israel Vehicle Importers Association (I-VIA), as a recognized member of OICA and CLEPA, serves as a crucial bridge between global automotive players and Israel's innovative mobility sector. We invite automotive manufacturers and suppliers to explore partnership opportunities with Israeli startups, leveraging our extensive network and deep understanding of both the local ecosystem and global automotive requirements. By engaging with Israel's smart mobility sector, automotive companies can accelerate their technological transformation, gain early access to cutting-edge solutions, and maintain their competitive edge in an increasingly software-driven industry. The successful collaborations highlighted in this report demonstrate the tangible benefits of engaging with Israeli innovation. We encourage industry leaders to join these forward-thinking companies in harnessing Israel's technological expertise to shape the future of mobility.



INTRODUCTION

The automotive industry is undergoing its most significant transformation since the invention of the assembly line. This transformation is driven by the convergence of software innovation, electrification, and autonomous driving technologies. As vehicles evolve from mechanical machines to sophisticated computers on wheels, the industry's value chain is shifting from traditional manufacturing to software development and digital services.

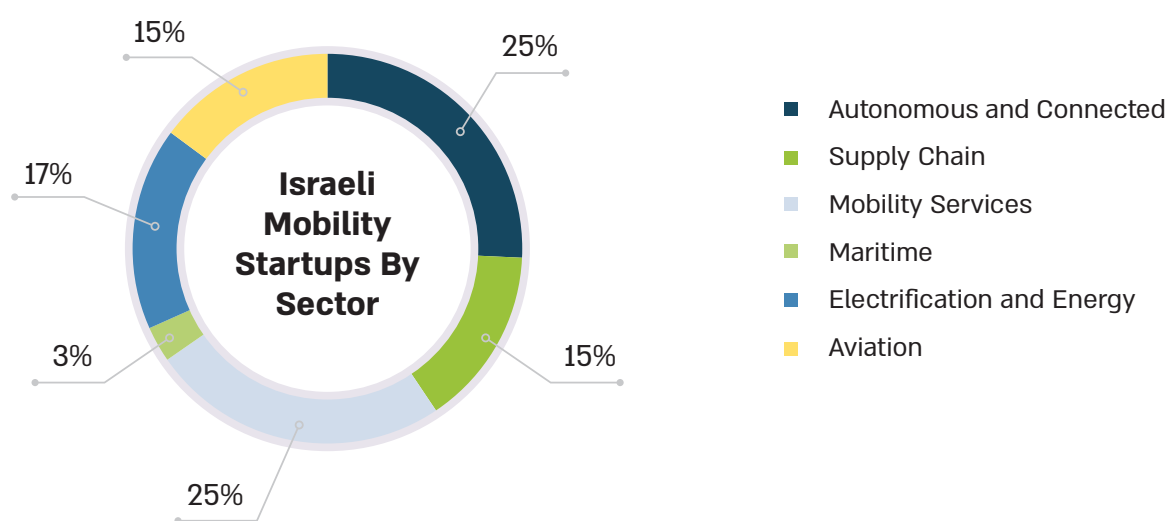
Israel, despite its relatively small size, has positioned itself as a crucial hub in this transformation. The country's unique combination of technological expertise, entrepreneurial culture, and defense industry experience has created an ecosystem particularly well-suited to addressing the automotive industry's emerging challenges. Israeli startups are developing cutting-edge solutions across the entire smart mobility spectrum, from advanced driver assistance systems (ADAS) and autonomous vehicle

technologies to electric vehicle charging solutions and battery innovations.

This report examines Israel's role in shaping the future of mobility, focusing on two key areas that are redefining the automotive industry:

- The transition to software-defined vehicles and the implications for traditional OEMs and their supply chains.
- The development and implementation of electrification and autonomous driving technologies, including an analysis of current market trends, regulatory frameworks, and technological challenges.

Through analysis of market data, case studies, and industry partnerships, this report provides insights into how Israeli innovation is contributing to the global smart mobility revolution and offers a perspective on future developments in this rapidly evolving sector.

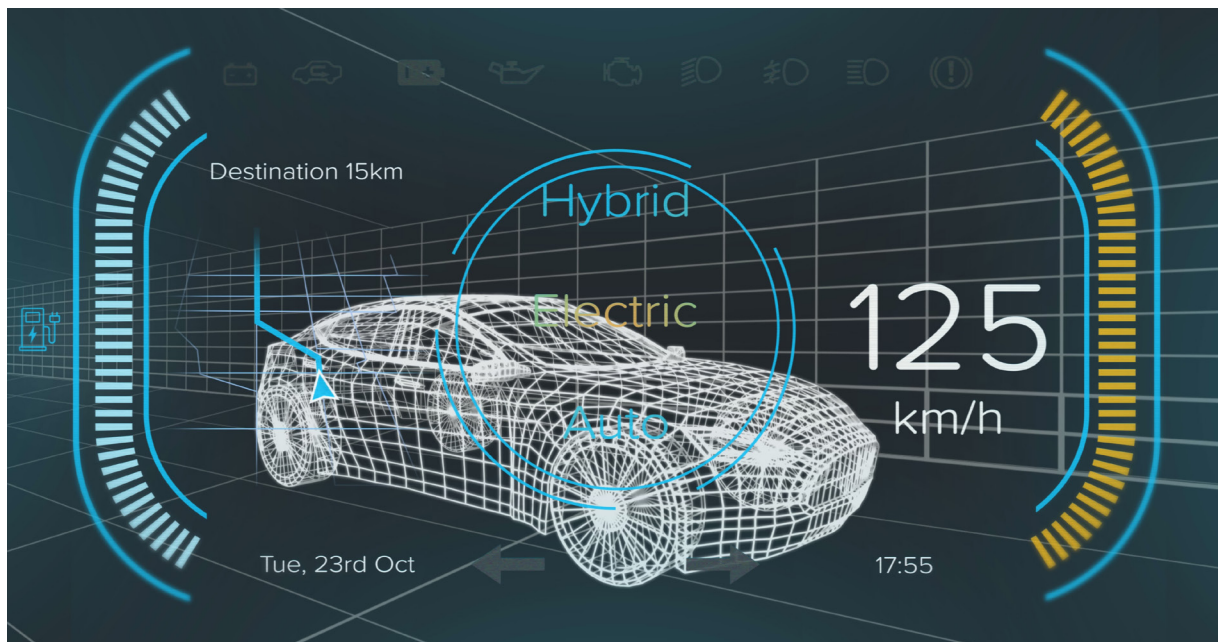


@EcomotionXMckinsey, 2023

SMART MOBILITY

Smart mobility refers to the integration of advanced technologies into the transportation sector to create more efficient, sustainable, and user-friendly systems. It encompasses a range of innovations, including electric vehicles (EVs), autonomous vehicles (AVs), connected vehicles and infrastructure, and shared mobility services. The core idea behind smart mobility is to leverage technology to address the growing challenges of urbanization, such as congestion, pollution, and the need for more efficient and inclusive transportation solutions.

The smart mobility industry has experienced rapid growth over the past decade, driven by a combination of technological advancements, regulatory support, and changing consumer behaviors. The global smart mobility market size was valued at USD 36.71 billion in 2023. The market is projected to grow from USD 43.46 billion in 2024 to USD 194.13 billion by 2032. According to KPMG, since 2010 smart mobility companies attracted 111\$ billion worth of investments.



ISRAEL - A GLOBAL HUB FOR SMART MOBILITY

Despite its small size, Israel is making a significant impact on the global automotive industry. It has rapidly become a hub of innovation and entrepreneurship in smart mobility, offering cutting-edge solutions in autonomous driving, vehicle connectivity, cybersecurity, electrification, and beyond.

Despite its small market size, Israel is the fourth biggest mobility start up hub in the world, after USA, China and the UK. Israel is the No. 1 geography in terms of mobility investment per

capita and as a share of GDP, world wide.

According to EcoMotion, Israel's Smart Mobility Community, there are 724 active companies in the Israeli automotive technology sector as of 2023—double the number from 2020, which stood at 350. Since 2010, these companies have raised over US\$30 billion and attracted investments from leading global OEMs, including GM, Daimler, Hyundai, Renault-Nissan-Mitsubishi, Toyota, and Volvo.

REDEFINING THE ROAD AHEAD: EVOLUTION TOWARD SOFTWARE DEFINED VEHICLES

The Shift from Hardware to Software in Automotive

Software-Defined Vehicles (SDVs) herald a new era for both automakers and consumers. Traditionally, vehicles were seen as hardware-driven engineering marvels, heavily reliant on electronic control units, wiring, and countless mechanical components. However, today—and increasingly in the future—software is taking the reins, managing functions that were once the domain of hardware. This shift is not just a passing trend but a significant transformation that is poised to grow substantially as vehicles become more software-centric: Today, software costs currently accounts for less than 10% of vehicle BOM (Bill of Materials), which is expected to grow to 50% by 2030.



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To expand on this, critical components for electrification such as batteries and electric drives and for autonomous driving like light detection and ranging (LiDAR) sensors and radar sensors will likely make up about 52% of the total market size by 2030. Components such as conventional transmissions, engines, and fuel injection systems would see a significant

decline to around 11% by 2030—about half the size of 2019 levels. Such a drastic shift will force traditional component players to adapt quickly to offset decreasing revenue streams. In this report we will focus on those two disruptive transitions that will redefine the automotive industry - electrification and autonomous driving.

OEMs Transitioning to Software-Driven Operations

Our cars are becoming increasingly software-defined with the ability to provide updates over the air, subscriptions to new features, and create a new revenue stream for automotive OEMs. As a consequence, OEMs will shift their core strengths from mechanical hardware to a focus on electronic hardware and software, leading to a transformation of the industry value chain from one-time hardware sales to ongoing revenues from software and service subscriptions.

As software and electronic hardware take on greater importance, OEMs are increasingly seeking control over the technology to define custom requirements, functions, and standards tailored to their specific needs, rather than relying on generic “black box” solutions. Consequently, a growing number of OEMs are forming partnerships with technology companies—including AI chip manufacturers, ADAS developers, and cybersecurity firms—through equity participation or strategic collaborations. Some OEMs have even gone a step further by establishing their own independent R&D divisions to gain technological superiority. This trend is expected to accelerate as vehicles become increasingly software-centric, shifting the traditional tiered supply chain model toward a more integrated and collaborative network.

TRANSFORMATION OF AUTOMOTIVE COMPONENTS: ELECTRIFICATION AND AUTONOMOUS DRIVING

Electrification and Energy

The Automotive Industry's Transition to Electric Vehicles

The debate over the automotive industry's transition to electric vehicles (EVs) is settled, with all major OEMs committed to going fully electric within the next decade or two. However, in Q3 2023, several automakers, including Ford, GM, and Lucid, revised their EV targets downward and scaled back investment and expansion plans. These adjustments were driven by a slowdown in sales, largely due to high prices and ongoing challenges related to the reliability and availability of charging infrastructure.

As of today, EVs represent approximately 16% of all vehicles sold, with over 14.1 million new EVs hitting the roads in 2023. In Europe, battery EVs and plug-in hybrids accounted for more than one in five cars sold that year. If this growth continues, EV sales are expected to surpass those of all other vehicle types by 2030, according to EY.

Global Regulations Accelerating the EV Transition

Regulations in the EU and the USA are accelerating the transition to EVs, with ambitious targets for EVs to make up at least 50% of all new car sales by 2030. Additionally, several countries are fast-tracking the phase-out of internal combustion engine (ICE) vehicles, with bans on the sale of new ICE cars expected between 2030 and 2035. These aggressive timelines underscore a global commitment to reducing carbon emissions and moving toward a more sustainable future in transportation.

Charging Infrastructure: Challenges Ahead

Charging infrastructure is a critical component of the electric vehicle (EV) ecosystem, playing a pivotal role in the widespread adoption of

EVs. The expansion and reliability of charging networks are essential to alleviate "range anxiety", a significant barrier for potential EV buyers who are concerned about the availability of charging stations during longer journeys. This field is facing several challenges: First, regional gaps in charging points availability, as most of the charging infrastructure is located in central cities and not distributed equally between countries. Second, is the crucial need in standardization and interoperability across different charging networks and regions. As the number of EVs increases, ensuring that charging stations are compatible with various vehicle types and charging systems becomes increasingly important, and requires adopting mutual communication protocols and standards. Third, As EV adoption grows, the demand for electricity will increase, putting pressure on the grid. Smart charging solutions that adjust charging times based on grid capacity and energy costs can help mitigate these issues, but they require sophisticated infrastructure and cooperation between energy providers, regulators, and charging network operators.

Investment in Electrification and Batteries

Over the last decade, US\$147 billion has been invested in electric vehicles (EVs) and US\$89 billion in batteries. Despite the global events between 2020 and 2023 that caused a general decline in mobility investments, funding for EVs surged by approximately 350%, and investments in batteries skyrocketed by around 900%. This substantial growth underscores the strong demand and the critical need for advancements in electric mobility.

Israel's Role in the Electrification Sector

In Israel, startups in the electrification and

energy sector make up 17% of the smart mobility industry, encompassing a total of 123 companies. Find details of leading companies in Annex A.

As the industry transitions to an electrified future, cost and efficiency have become critical factors. The challenge lies in reducing the costs associated with engineering, materials, and EV production while simultaneously improving the efficiency and reliability of the final product. To achieve this, OEMs and tier 1 companies are collaborating with Israeli tech firms to develop technologies that will lower costs and enable the efficient scaling of EVs. Additionally, OEMs and Tier 1 companies have acquired Israeli mobility electrification and energy companies. Two notable examples include the acquisition of

Driivz, an Israeli company specializing in electric vehicle charging and energy management solutions, by Gilbarco Veeder-Root in 2021 for USD \$200 million, and the acquisition of AlgoLion, an Israeli battery software startup, by GM in 2023 for an undisclosed amount.

Beyond acquisitions, strategic collaborations between Israeli startups and global OEMs and Tier 1 companies are on the rise. These partnerships help established players quickly adopt advanced technologies, highlighting the growing trust in Israeli innovation. The next chart shows notable collaborations between Israeli tech companies and OEMs/Tier 1 companies in the energy and electrification field:

SOME NOTABLE PARTNERSHIPS BETWEEN ISRAELI TECH COMPANIES AND OEMS/ TIER 1 COMPANIES

STOREDOT X VOLVO

Year: 2023

Highlights: StoreDot, a pioneer of extreme fast charging (XFC) battery technology for electric vehicles, has signed a landmark multi-year agreement with Volvo Cars to develop an optimized battery for next generation Volvo cars.

Scope of Collaboration: The collaboration will lead to the development of XFC cells which will be optimized and tailored for Volvo's future electric vehicle architectures. It's expected that the first samples will be delivered for testing next year. Through its '100inX' product roadmap, StoreDot's battery technology is delivering 'Range on Demand™': 100 miles charged in 5 minutes in 2024, 100 miles charged in 3 minutes by 2028, and extreme energy density solution enabling 100 miles charged in 2 minutes by 2032.

ELECTREON X TOYOTA X DENSO

Year: 2023

Highlights: Electreon, developer and provider of wireless charging solutions for Evs, has come to an agreement to jointly develop an advanced wireless charging technology built on Electreon's technology and knowledge with Toyota Motor corporation and Denso Corporation.

Scope of Collaboration: The parties co-develop an aftermarket wireless kit for current EVs to utilize wireless charging technology. In addition, the parties work on integration of the wireless technology into new cars released to the market, collaborating to shape the standardization of wireless EV charging, and promoting a joint pilot project in Japan, the U.S. or the EU, including commercial proof of business.

SOME NOTABLE PARTNERSHIPS BETWEEN ISRAELI TECH COMPANIES AND OEMS/ TIER 1 COMPANIES

REE X MAHINDRA

Year: 2020

Highlights: Ree, developing the next generation EV platform which is completely flat, scalable and modular, and Mahindra, one of India's leading automakers, signed MOU to leverage REE's corner module and modular platform technology and Mahindra's vehicle design, engineering, sourcing capability and manufacturing assets.

Scope of Collaboration: The collaboration was aimed at global markets with global volume estimated over time at 200,000-250,000 units, including potential Mahindra's domestic and international volumes.

IRP SYSTEMS X BOSCH

Year: 2022

Highlights: IRP Systems, a leading provider of cutting-edge electric powertrain solutions for e-mobility, has signed a strategic agreement with Bosch, the world's leading automotive manufacturer, for the industrialization and serial manufacturing of IRP's personal mobility electric motor controllers.

Scope of Collaboration: The collaboration aims to provide electric vehicle manufacturers, particularly those producing small vehicles such as scooters and e-bikes, with motor controllers that increase the range of electric vehicles while reducing weight and cost.



Autonomous and Connected vehicles (CAVs)

Connectivity and autonomous vehicle technologies are at the forefront of the smart mobility revolution, fundamentally transforming how people and goods move. It has the potential to increase road safety, make transportation more accessible and inclusive and reduce congestion, once done right.

Reality Check on Level 5 Autonomy

There is an international consensus on six levels of driving automation, based on SAE's J3016 standard, ranging from Level 0, which involves no driving assistance, to Level 5, where the vehicle is fully autonomous in all situations, without the need for an onboard operator.

In the mid-2010s, there were bold predictions that Level 5 (L5) autonomous driving would be implemented and commercially scaled by 2020. However, reality has proven otherwise. What was viewed in 2015 as a "solved problem" by Elon Musk, with expectations for full autonomy by 2020, has proven to be increasingly challenging and costly. This has delayed the anticipated timeline, making it clear that we are now might be decades away from achieving fully autonomous vehicles, leading investors to shift focus towards more practical and profitable applications of autonomous mobility.

While the development of robotaxis and other fully autonomous mobility services faces hurdles, autonomous features in private passenger cars continue to evolve, gaining support from regulators, safety organizations, and consumers alike. Autonomous features have become increasingly common, with Level 2 autonomous vehicles now being the default, and Level 3 vehicles are now present on the road. It seems like the industry is delaying L4 features development, as commercialization may be initially limited to premium vehicles segments, due to high costs.

Accelerating Factors in Autonomous Adoption: Regulation and Consumer Demand

Europe's Vehicle General Safety Regulation, together with the New Car Assessment Program (NCAP), strongly advocates for the integration of active safety systems in passenger cars. To achieve NCAP's coveted five-star safety rating in 2020 and 2022, OEMs had to implement features like automatic emergency braking (AEB) and automatic emergency steering (AES). As a result, over 90% of cars made in Europe and the U.S. now include Level 1 autonomous capabilities as standard, reflecting NCAP's influence in accelerating the adoption of these critical safety technologies.

The path to vehicles achieving Level 4 autonomy—where driverless control is possible under certain conditions—remains long, but consumer interest is a driving force. A 2021 McKinsey survey revealed that consumers are eager for autonomous driving features and are willing to pay for them. This growing demand could generate substantial revenue, with McKinsey estimating that the ADAS and autonomous driving market in the passenger car sector could be worth between \$300 billion and \$400 billion by 2035.



ADAS and autonomous driving market in the passenger car sector could be worth between 300\$ billion and 400\$ billion by 2035





Investment Trends in Autonomous and Connected Technologies

Investment in autonomous and connected technology companies continues to be robust globally, driven by the growing demand for advanced mobility solutions. Despite economic challenges and a general downturn in venture capital investments, sectors like autonomous vehicles and connected technologies have remained attractive to investors, particularly due to their potential to revolutionize transportation.

Israel's Role in Autonomous and Connected Mobility

In Israel, the trend is similar, with the country remaining a significant hub for innovation in these areas. Autonomous and connected

mobility is the leading sector for mobility startups in Israel, accounting for 26% of the smart mobility industry and encompassing a total of 188 companies. Find details of leading companies in Annex B.

Autonomous driving may be the sector that best reflects the evolving needs of OEMs during the transition to software-based vehicles. Developing and implementing autonomous driving capabilities, particularly in relation to Level 3 and Level 4 features, demands robust in-house expertise or strategic partnerships with leading technology players. The Israeli industry, with its innovative edge, stands at the forefront of this transformation. Through strategic investments and acquisitions of

Israeli autonomous mobility startups, such as Intel's acquisition of Mobileye in 2017 for USD \$15.3 billion, Gentex's acquisition of Guardian Optical Technologies in 2021 for USD \$17 million, Continental's acquisition of Argus Cyber Security in 2017 for USD \$430 million, and LG's acquisition of Cybellum in 2021 for USD \$240 million, the global automotive industry is actively integrating cutting-edge technologies developed in Israel.

Beyond acquisitions, strategic collaborations between Israeli startups and global OEMs and Tier 1 companies are on the rise. These partnerships help established players quickly adopt advanced technologies, highlighting the growing trust in Israeli innovation. The next chart shows notable collaborations between Israeli tech companies and OEMs/ Tier 1 companies in the autonomous and connected field:

SOME NOTABLE PARTNERSHIPS BETWEEN ISRAELI TECH COMPANIES AND OEMS/ TIER 1 COMPANIES

INNOVIZ TECHNOLOGIES X VOLKSWAGEN GROUP

Year: 2022

Highlights: Volkswagen has selected Innoviz as its LiDAR supplier, marking a significant milestone as Innoviz, a tech company becomes a Tier 1 supplier in the automotive industry.

Scope of Collaboration: Under the deal, Innoviz will provide LiDAR technology and software to VW's autonomous vehicles unit called CARIAD starting in 2025. Innoviz expects to supply between 5-8 million LiDAR units across multiple brands within the Volkswagen Group over an eight-year period.

FORTELLIX X VOLVO GROUP

Year: 2022

Highlights: Volvo Autonomous Solutions has formed a partnership with Foretellix to jointly create a Coverage Driven Verification solution for autonomous driving solutions operating on both public roads and in confined areas.

Scope of Collaboration: The solution will enable large-scale testing of millions of scenarios, ensuring autonomous vehicles and machines can handle any situation within their Operational Design Domain (ODD). The partnership will enhance the safety and productivity of Volvo Autonomous Solution vehicles, with the ability to conduct large-scale simulations and big data analysis, reducing costs and time to market, and accelerating operational readiness across multiple sites and ODDs.

SOME NOTABLE PARTNERSHIPS BETWEEN ISRAELI TECH COMPANIES AND OEMS/ TIER 1 COMPANIES

ARBE X VEONEER

Year: 2022

Highlights: The automotive technology company Veoneer and the 4D imaging radar solutions company Arbe Robotics Ltd announced plans to co-develop radars for automotive-grade safety and rolling out autonomous functionality

Scope of Collaboration: Veoneer will develop, market, and integrate two surround 4D imaging radars extending on Arbe's reference designs: one long-range, high resolution, 360° sensing solution with 48x48 RF channels (Tx/Rx) and one with 24x12 RF channels. Veoneer's patented waveguide technology will enhance Arbe's performance metrics further by improving antenna efficiency and reducing performance variability in the manufacturing process.

AUTOTALKS X HYUNDAI

Year: 2018

Highlights: Hyundai Motor and Autotalks collaborate in developing the next generation V2X chipset for connected cars.

Scope of Collaboration: Autotalks partnered with Hyundai Motor Group to integrate V2X communication technology into Hyundai's vehicles, enhancing safety and supporting autonomous driving by enabling real-time communication between vehicles and their surroundings, crucial for preventing accidents and improving traffic efficiency.

Annex A: List of notable Israeli tech companies - Energy and Electrification

Batteries

Name	Description	Year Founded	Funding Stage	Business Model
<u>StoreDot</u>	StoreDot specializes in the development of extreme fast charging (XFC) battery technology for electric vehicles, aimed at reducing charging times to support broader EV adoption. The technology allows for an EV to be charged in times comparable to refueling a conventional combustion engine vehicle.	2012	D	B2B
<u>Phinergy</u>	Developing aluminum-air and zinc-air battery technologies that offer extended driving ranges for electric vehicles.	2009	Public	B2B, B2G
<u>Addionics</u>	Focuses on improving battery performance through advanced 3D electrode technology, which can be applied to automotive batteries.	2017	A	B2B
<u>Apollo Power</u>	Apollo Power develops and manufactures photovoltaic (PV) technology, including flexible and ultra-light solar cells. Apollo collaborates with OEMs like Audi, Hyundai, Renault, and CEVT to incorporate solar technologies in different parts of vehicles	2014	Public	B2B

Charging Solutions

Name	Description	Year Founded	Funding Stage	Business Model
<u>Charging Robotics</u>	Charging Robotics is developing an automatic wireless charging system dedicated for public parking lots	2021	Public	B2B
<u>Electreon</u>	Electreon develops and provides wireless charging solutions for Evs providing end-to-end charging infrastructure and services.	2013	Public	B2B
<u>Zooz Power</u>	The company develops a Kinetic Power Booster enables cost- effective ultra-fast EV charging anywhere, while overcoming grid limitations and supporting sustainability goals. The ZOOZTER(TM) is a power booster designed to enable ultra-fast charging for electric vehicles in locations with limited grid capabilities.	2013	Public	B2B

Charging Management and Optimization

Name	Description	Year Founded	Funding Stage	Business Model
<u>Drivz</u>	Electric Vehicle Charging and Energy Management Solution. The solution comprises several modules, including Operations Management, Smart Energy Management, Billing Management, Driver Self-service Tools, and EV Fleet Management	2012	Acquired	B2B, B2B2C
<u>Galooli</u>	Remote Energy Monitoring and Management	2009	A	B2B
<u>Make my day</u>	Make my day is Simplifying EV fleet charging and operation with smart route planning for EV drivers and fleets	2017	A	B2B, B2B2C

ANNEX B: LIST OF NOTABLE ISRAELI TECH COMPANIES-AUTONOMOUS AND CONNECTED

Driver Monitoring Systems

Name	Description	Year Founded	Funding Stage	Business Model
<u>CorrActions</u>	CorrActions provides a software-only, motion based, driver monitoring product. CorrActions uses unconscious, uncontrollable, muscular submovements to monitor brain activity. By tracking these movements from sources like steering wheels or smartphones, CorrActions can detect a wide range of cognitive states	2019	A	B2B
<u>Jungo Connectivity</u>	An AI-powered driver monitoring system tailored for commercial fleets. This system leverages camera-based technology and advanced AI algorithms to monitor driver behavior, enhancing safety by preventing accidents	2013	Public	B2B
<u>Cipia Vision</u>	Cipia specializes in in-cabin sensing solutions for the automotive industry, offering driver monitoring systems (DMS) and occupancy monitoring systems (OMS) powered by computer vision AI. These solutions aim to enhance safety and the in-car experience by using edge-based AI to monitor drivers' and passengers' states in real-time	2005	Public	B2B

Simulation and Verification Platforms

Name	Description	Year Founded	Funding Stage	Business Model
<u>Cognata</u>	Cognata provides advanced simulation software that accelerates the development of AV and ADAS technologies. Leveraging AI and deep learning, Cognata recreates real-world conditions in virtual environments, enhancing the testing and validation of automotive sensors and systems	2016	B	B2B, B2G
<u>Fortellix</u>	Fortellix develops and provides simulation-based testing tools for automated driving systems. The company's platform automates the testing, verification, and validation of ADAS and AV software, helping to ensure the safety and reliability of these systems.	2018	C	B2B

Sensing Technologies

Name	Description	Year Founded	Funding Stage	Business Model
<u>Innoviz</u>	Innoviz Technologies provides LiDAR remote-sensing solutions for fully autonomous vehicles. The company's flagship high-definition solid-state LiDAR, InnovizOne, enables smart, advanced 3D sensing.	2016	Public	B2B
<u>Arbe</u>	Arbe Robotics develops 4D imaging radars for the automotive industry. Their radars offer ultra-high resolution and 360-degree coverage, making them ideal for Level 2+ and higher autonomous driving applications	2015	Public	B2B
<u>Foresight Automotive</u>	Foresight Automotive develops advanced stereoscopic vision systems for autonomous vehicles and other industries. Their technology enhances real-time navigation and obstacle detection using 3D perception, offering solutions like ScaleCam, Mono2Stereo, and QuadSight 2.0	2015	Public	B2B
<u>Lidwave</u>	Lidwave has developed a 4D LiDAR sensor that elevates safety and autonomy to new heights, with a groundbreaking combination of affordability, scalability, and performance.	2019	Seed	B2B
<u>Newsight Imaging</u>	Newsight Imaging designs, develops, and manufactures cutting-edge 3D depth-sensing solutions at an unbeatable price. Our sensors provide superior performance for many markets and applications, such as Automotive & ADAS, Industry 4.0, Smart City & Robotics	2016	B	B2B
<u>OpsysTech</u>	OpsysTech delivers a solid-state scanning LiDAR based on integrated VCSEL arrays and SPAD detector arrays. The technology enables high-resolution, long-range, and ultra-fast-scanning LiDAR across the full field of view	2016	C	B2B, B2G

Remote Operations

Name	Description	Year Founded	Funding Stage	Business Model
<u>Ottopia</u>	Ottopia enables remote driving on public roads and networks: we help OEMs unlock billions in subscription revenue	2018	A	B2B
<u>DriveU</u>	DriveU's open connectivity platform enables remote operations of autonomous vehicles using cellular bonding with multiple modems	2019	Seed	B2B

CyberSecurity

Name	Description	Year Founded	Funding Stage	Business Model
<u>Enigmatos</u>	Enigmatos offers a cybersecurity monitoring service for fleets, focusing on safety for connected vehicles. Enigmatos protects against cyber threats with advanced and patented tech for monitoring and detecting vulnerabilities to ensure data fidelity and operational continuity in a digital, interconnected environment	2015	Seed	B2B
<u>Karamba Security</u>	Karamba Security provides embedded cyber-security solutions for connected systems. Karamba's software is designed and implemented to safeguard resource-constrained systems. Karamba security solutions automatically integrate into the system's software and continuously check the system's runtime integrity. When a deviation from the system's factory settings is detected, the system blocks it automatically, preventing zero-day cyber attacks with zero false positives and negligible performance impact	2016	C	B2B
<u>Infinidome</u>	We develop GPS protection and resilient navigation solutions tailored to defend UAVs and vehicles from jamming attacks. Today we're disrupting GPS protection for UAVs for defense/HLS and will do the same for delivery drone protection tomorrow.	2016	A	B2B, B2G

Semiconductors

Name	Description	Year Founded	Funding Stage	Business Model
<u>Valens</u>	Valens is a leading provider of semiconductor products that enable high-speed connectivity in vehicles. Their chips are used for in-vehicle networks, delivering data for infotainment systems, ADAS, and autonomous driving, allowing vehicles to process large amounts of data quickly and reliably	2006	Public	B2B
<u>Hailo</u>	Hailo develops specialized AI processors designed for edge devices, including autonomous vehicles. Their chips offer high computational power for AI tasks, making them suitable for real-time perception, decision-making, and other complex processes within smart mobility systems	2017	C	B2B,B2G

Autonomous Driving Systems

Name	Description	Year Founded	Funding Stage	Business Model
<u>Imagry</u>	Imagry specializes in autonomous driving technology, utilizing an HD-mapless driving system. Their technology combines real-time vision-based perception with imitation-learning artificial intelligence, forming a decision-making network for driving. This system equips autonomous vehicles to interpret and adapt to changing road conditions and environments intuitively, similar to an experienced human driver. The software's capabilities enable operation on public roads without reliance on high-definition maps, providing a flexible and adaptive navigation solution.	2015	B	B2B
Mobileye	Mobileye is a leading developer of advanced driver assistance systems (ADAS) and autonomous driving technologies. Mobileye's cuttingedge technology includes computer vision, machine learning, millions of vehicles worldwide. Its features include collision avoidance, lanekeeping assistance, and traffic sign recognition.	1999	Public	B2B, B2C

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