

Q42023 & Annual ACTIVITY REPORT



The Marker Opening Column-Israeli Hi-tech Magazine

המטרה העליונה - להבטיח את יציבותה והמשכיותה העסקית של תעשיית ההייטק

חרף המלחמה, היזמים ממשיכים לפתח טכנולוגיות ומוצרים חדשים. אך חלק מהשחקנים ובמיוחד הזרים נמצאים בעמדת המתנה ועלולים להעביר השקעות, אנשים וסניפים למקומות תחרותיים אחרים בעולם. על הממשלה לשתף פעולה עם התעשייה כדי להבטיח את חוסנו של ההייטק הישראלי והמשך תרומתו המכרעת לכלכלת ישראל

עו"ד קרין מאיר רובינשטין

בפתחה של שנת 2024, כשברקע מלחמת "חרבות ברזל', תעשיית הי-טק הישראלי ניצ־ בת בפני אתגר משמעותי ביותר, יזמים, חברות מקומיות צעירות ובשלות. קרנות הוז סיכוז וחברות רב-לאומיות פועלים כתף אל כתף כדי לשמר את המומנטום החיובי של התעשיה חרף ההאטה בהייטק העולמי מאז שנת 2021, התהפוכות המקומיות על רקע הרפורמה המ־ שפטית והמלחמה שפרצה בשבעה באוקטובת ממשלת ישראל חייבת להבין באופן מוחלט שעליה להציב את תעשיית ההייטק כקטר שי משיך להוביל את הכלכלה הישראלית והחב־ רה הישראלית בחזרה לשגרה, בדרך לתנופה ולצמיחה בין-לאומית.

"חשוב מאוד שהממשלה והרגולטורים ירינו שהאינטרס הלאומי החשוב ביותר הוא לחזק ולשמר את ההייטק הישראלי. המשמש מזה שנים ישראל וכמנוע הצמיחה "העיקרי של המשק

כדומה למדינת ישראל, ההייטק הישראלי נולד מתוך מצוקה. הוא התגבר על אתגרים רבים וחסמים תרבותיים כדי להוציא מוצרים לשוק ולהתמודד עם משאבים מוגבלים וספק־ נות רבה כדי לגיים מימוז למיזמים. ההצלחה אל מול הקשיים התדירים הפכה את ההייטק הישראלי לסתגלן ועמיד במיוחד בפני אירו־ עים כלתי צפויים, כגון מגפות ומלחמות וכ־ וודאי בפני האטות כלכליות.

העת הזו היא תקופה מאתגרת ומלאה בכאב למדינת ישראל ולעם ישראל. רבים מעובדי התעשייה מסייעים בהגנה על המדינה. אר מי שלא במילואים חזר כבר לשגרת עבודה,

תוד שהוא חדור מוטיבציה. גמי־ שות מחשבתית ויכולת הסתג־ לות גבוהה, כדי להמשיך את העשייה ולהבטיח את החזרה לכלכלה משגשגת ככל הני־ תז. ההייטק הישראלי נכנס לתקופה זו על בסיס יציב ועם התמיכה של עמיתינו מכל העולם, שותפים ולקוחות, ואנו צופים שהוא ימשיך להיות מוביל עולמי.

דרושה - וודאות ופשטות רגולטורית

כבכל תעשיה בין-לאומית, המלחמה מעו־

ררת חששות וקשיים בקרב השחקנים בשוק

ההייטק. חלק מהשחקנים מעדיפים לשבת

על הגדר במצב של "wait and see" וניכרת

האטה הז בפעילות ההשקעות והז בשוויים. אר

על אף המלחמה, ההייטק הישראלי ממשיך

ללא הפרעה באופן יחסי.



יש להכטיח יציכות ופשטות רגול־ טורית ולדאוג לחלוקת המשא־ בים בהתאם לסדרי עדיפויות ראויים ומקדמים. במיוחד כשהצורך המימוני ייהפך להיות יותר משמעותי.

שיתוף פעולה חיוני לפי הנתונים של IATI, ייצוא ההייטק עומד על 67 מיליארד דולה רוב תשלומי המיסים הפ־ רטיים מגיעים היום מענף זה

ובחמש השנים האחרונות רוב צמיחת התו־ צר בישראל נבעה מתעשיית ההייטק, כאשר פעילות הענף מהווה למעלה מ-16% מהתל"ג ומופקת על ידי 12% מכוח העבודה. בנוסף, מלבד התרומה הכלכלית הישירה. תרומתו של ההיי טק היא מגוונת ומתפרסת על מגווז תחומים כלכליים חברתיים.

בתקופה מאתגרת זו. מטרת העל של האיגוד הישראלי לתעשיות מתקדמות (IATI), כאר־ גון הגג של תעשיות ההיי-טק ומדעי החיים בישראל, היא להמשיך ולכסס את יציכותה של תעשיית ההייטק בישראל והמשכיותה העסקית כדי לתרום לחוסן הלאומי ולצמיחה הכלכלית של ישראל.

לאורך כל השנים פעלו ה-IATI ורשויות ומ־ שרדי הממשלה השונים יד ביד למתן מענה משותף ומדויק לצרכי התעשייה אל מול תנאי השוק המשתנים, כדי להבטיח את חוסנה של התעשייה והמשך תרומתה המכרעת לשגשוג כלכלת ישראל.

שיתוף פעולה הדוק ומדויק שכזה חיוני עתה ביתר שאת אל מול האתגרים הכבירים הני־ צבים בפני מדינת ישראל בכלל ותעשיית

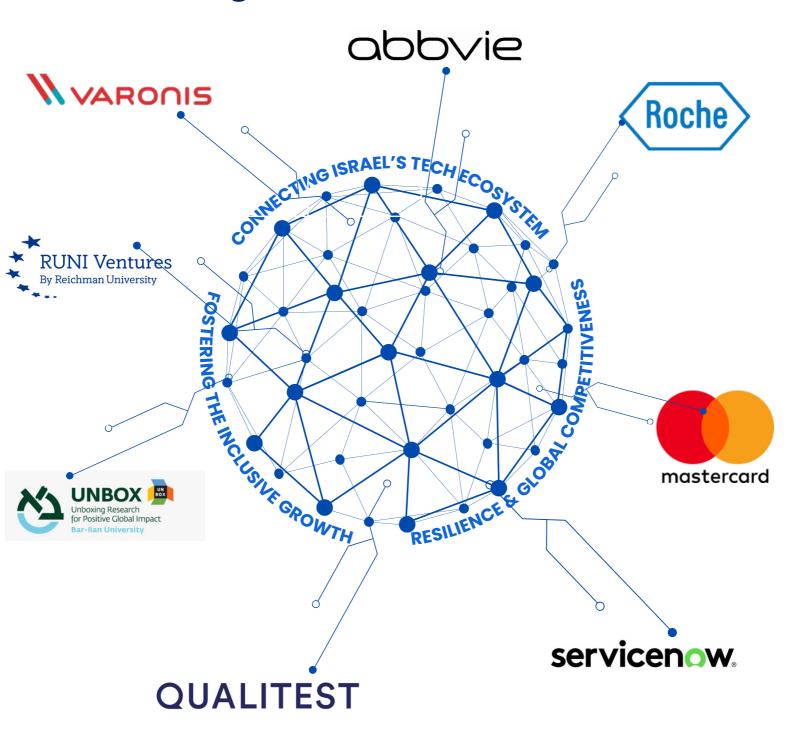
הכותבת היא מנכ"לית ונשיאת האיגוד הישראלי לתעשיות מתקדמות (IATI)





2023 New Members

Welcome to the Exciting Q4 Additions Among Our New IATI Members!



To see all of IATI's Members

Following October 7th Selected Initiatives



Israel Mitgayeset

Israel Mitgayeset is an arena for joint action for social, economic resilience and effective support in times of war & reconstruction. The purpose of the arena is to create a planned, synchronized and effective response to existing and future challenges regarding the war & national priorities and for field needs.



Following October 7th Selected Initiatives

IATI Exclusive Virtual Meeting



A Dialogue with Leading Venture Capitalists about The Role of the Tech industry during challenging times. Hosting: Adam Fisher. Bessemer Partner Venture Partners. Yoram Tietz. Senior Advisor at General Atlantic, Ronen Nir, Managing Director at PSG, Niv-Managing General Eyal Partner at Pitango, Sarel Eldor, Co-Founder and Managing Partner at Key1 Capital, Eli Groner, Co-Chairman at IATI & Managing Director Koch Disruptive at **Technologies** & Karin Mayer Rubinstein, CEO & President of

IATI.

To the Jerusalem Post coverage

To the meeting recording

IATI & Israel Innovation Authority



A dedicated webinar for Investment Entities that wish to provide parallel support in the high-speed channel. The meeting was held by Venture Capitals, Investments Funds & Angel Investors

To the meeting recording

Following October 7th Selected Initiatives

IATI in collaboration with Infinity Labs, partner together to provide an immediate & temporary solution aid package to Israeli development centers who are facing deficiency of software developers, cyber and DevOps human capital as a result of recruiting tens of thousands to fight Hamas and Hezbollah.



For more details

IATI is among the first partners who anitiate this national initiative together with **Izhar Shay**, investor & entrepreneur, former Israeli minister of Science and Tech. In memory of Izhar's son - Yaron and 1300+ other victims and fallen soldiers from the Hamas attacks and atrocities of October 7th. Izhar has launched Next October, an initiative to develop 1300 high tech startups to solve important problems exhibiting optimism and resilience.

To the meeting recording



Following October 7th Selected Initiatives



The Civil Administration, in collaboration with the Ministry of the Interior and the national initiative "Israel Mitgayeset," in partnership with IATI, invited company CEOs to a joint strategic thinking and action planning meeting regarding the challenges faced by communities along the conflict line in the North.

As part of the meeting, a tour was held along the communities with "Pikud Haoref" and the Northern Command, to examine and plan the long-term strategy of the socioeconomic rehabilitation of the State of Israel and addressing collectively strategizing the medium and long-term planning for Israel's economic-social rehabilitation, and more.

Within the complex situation, the association has compiled a document summarizing the professional initiatives of leading law firms and accounting firms, as part of the activities of IATI's Legal and Accounting Committee. The document outlines various options for legal assistance, guidance services, consultation, and more

To the full Document



Following October 7th Selected Initiatives



IATI in collaboration with Fahn Kanne Grant Thornton Israel & Gornitzky & Co Law Office, held insightful webinar for Olim Hadashim about optimal management strategies in times of crisis & business uncertainty. The webinar hosted Inbar Blum, Deputy Head of the Growth Division at Israel Innovation Authority, and our partner Anna Moshe, Adv., LLM, Chair of the Emerging Companies & VC Practice at IL Office. It focused on the "Fast-Track Funding Program", quick response to tech industry challenges during the "Iron Swords" war, to support Technological Companies and entrepreneurs



To the meeting recording

IATI & Pearl Cohen held a webinar, for English speakers and new immigrants, regarding the **fast-track funding program**- discussion about the quick response to the challenges facing technology companies during wartime

2023 Programs & Courses

Meshuh'rer-Tech: women soldiers integration program into technological professions

•The 'Meshuch'rerTech' program by IATI, in collaboration with the Employers' Directorate and the IDF, is designed to equip female IDF soldiers for a seamless transition from the military into future roles within the technology sector. The program encompasses diverse elements, including mentorship by female engineers from the industry and selected IATI-affiliated companies, company tours, a study program, workshops, and more. The objective of this initiative is to furnish female soldiers with the essential tools and knowledge for success in the tech industry while advancing gender diversity and equality in the workforce





iln partnership with prominent companies among IATI's membership, including Nvidia, Neuroderm, Palo Alto, and Pluri, we organized an office tour and conducted a panel discussion featuring engineers.. The Open University not only participated in the program but also hosted the completion ceremony for the pre-academic phase. Furthermore, we consistently organize enrichment sessions and offer content tailored for female soldiers

2023 Programs & Courses

IATI & Tel-Aviv Stock Exchange Analysis Course in the field of Food Technologies & Agricultural Technologies



ATI and the Tel-Aviv Stock Exchange partnered to offer an educational analysis course for institutional investors and analysts in the fields of FoodTech and AgTech. These fields are gaining momentum and are expected to be a central part of Israeli and global innovation in the future.

The course consisted of four professional sessions during which an overview of the developing trends and current and future aspects of these technologies was provided. The sessions also featured expert lectures on valuation & regulatory innovations

Women in Tech - Diversity, Inclusion & Equity Course for Companies & VCs Funds from the Hi-Tech Sector



course was formed as The collaboration between IATI, itworks & the Equal Employment Opportunity Commission. It was designed and built specifically for the high-tech sector, focusing on the unique challenges that exist in the local and global arenas. connecting to the business dynamics in the field. The course provided professional knowledge & work methods in order to attain an optimal integration of all Israeli diverse minorities offered further and consulting to initiate & Implement DEI strategic processes in the organization

2023 IATI's Reports

The Impact of the Tech Sector on the Israeli Economy & Society



We are pleased to present the first of its kind professional report on the contribution of the high-tech industry to the Israeli economy and society. The report, in collaboration with Deloitte, is a unique report that will be published annually from now on. The contributions identified are based on long-term trends, both in terms of the characteristics and roles of the industry, as well as in terms of growth trends.

The report aims to identify and assess the quantity and quality of the high-tech industry's contribution to Israel's economy, national security, and its impact on employment and changes within the industry.

The major challenges in preserving the high-tech industry's role as a central growth engine in the Israeli economy have been mapped out. The report draws on data from various sources and includes insights from experts in the Israeli tech ecosystem, including CEOs of Israeli and multinational companies, partners in venture capital funds, academics, and government officials. Deloitte were accompanied by a steering committee headed by

Deloitte were accompanied by a steering committee headed by IATI CEO & President Karin Mayer Rubinstein, which included key industry leaders. The committee advised the research process and the resulting insights.

To the full report

Hebrew / English

To the executive summary

To press converge

2023 IATI's Reports

IATI Israel's Life Science Annual Industry Report - H1 Update



The Report focuses on the capital raising of life sciences companies in Israel and presents interim data for 2023 preparation comprehensive publication of а Report at MIXIII Health-Tech.IL

This update indicates a decrease in investments in life sciences companies in Israel; In the first six months of 2023, in which approximately 1.4 billion dollars were invested. a decrease the corresponding compared to period in 2022; About half a billion dollars were raised bν Israeli US the stock companies on exchanges, twice as much as in 2022 as a whole; an increase in the average amount per transaction as well.

Israeli life sciences firms' capital-raising slows 40% in first half of 2023

ocal life sciences companies turn to US stock markets for funding, private foreign investors' activity more than halves, data by Israel Advanced Technology Industries (IATI) shows









To press converge

To the H1 Update Report

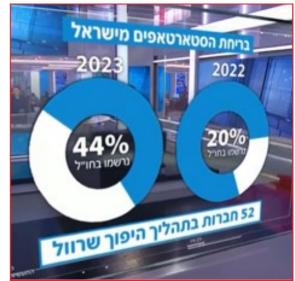


2023 IATI's Surveys

Establishment of new startups in the first half of 2023

We have conducted a survey among the IATI Legal and Accounting Committee, which includes the Leading Commercial Firms in Israel. As part of the survey, comparative data was collected in relation to the first half of the year 2023 compared to the year 2022 regarding new start-ups established during this period. The firms were asked to indicate the active Corporate Inversion processes they handled in the first half of the year 2023, even if they have not yet been completed.

The survey was conducted among the leading law firms in the field: Goldfarb Gross Seligman; Herzog Fox & Neeman; H-F & CO.; Meitar; Erdinast, Ben Nathan, Toledano & Co.; Naschitz, Brandes, Amir Co.; S. Horowitz & Co.; Shibolet & Co.; AYR and more. Therefore, the union believes that the information collected is indicative of the prevailing trend in the industry as a whole during the relevant period



To Full Survey Results

<u>To press coverage</u>

IATI HR Global Companies Workgroup: Workplace Attendance

We have conducted a survey among the IATI HR Global Work Group regurding the organization's policy about workplace attendance.

The results shows that the level of flexibility has increased significantly from what it was before the pandemic. Most companies declare to be office-oriented and reported of 3 days office work in order to enable learning, innovation, collaboration/effective communication and faster decision-making.

To Full Survey Results



IATI HR Global Companies Workgroup: HR in time of war

We have initiated a survey among global technology companies operating in Israel regarding the impact of the "Iron Sword War" on their human capital & businees productivity. The survey conducted among more than 50 global technology companies operating in Israel yields very intriguing findings, including

Israel
Advanced
Technology
Industries

IATI HR Global Companies Workgroup Survey
Global HR in time of War #2

October 26, 2023

To Full Survey Results

2023 Forums & Committees Quarterly Meetings

MNC Forum



The IATI MNC Forum is gathering on a quaterly basis & is a critical player in Israel's advanced tech ecosystem. Senior C-level executives across MNCs gather to discuss and take joint action on burning issues in areas such as industry positioning, regulation, human capital & positively impacting Israel's economy and society. This year, the forum meetings focused on the current challenges facing the industry due to the global & local economic slowdown and it's impact on the MNC.

This year we held a quaterly meetings at: Apple & Microsoft and we held our MNC Forum Annual Conference at Herzog law Firm.

Venture Capital & Investment Funds



IATI's Venture Capital & Investment Funds Committee convene on a quarterly basis. The investors segment, composed of venture capital firms and investment funds, powers Israel's advanced tech ecosystem comprising ~2000 startups. Managing Partners & CFOs of Israel's leading VCs and investment funds join forces to identify and resolve pressing challenges, and IATI facilitates their discourse with government ministries to ensure a conducive and stable environment for business conduct. By bringing together industry leaders and experts, in daily routine and specially during war time, we aim to foster collaboration and knowledge-sharing in order to drive innovation and growth in the sector and promise business continuity.

2023 Forums & Committees Quarterly Meetings

Legal & Accounting



The IATI Legal & Accounting Committee Led by Dan Shamgar from Meitar, gathering on a quarterly basis. This committee incorporates the managing partners of the high-tech departments at the leading law and accounting firms in Israel. The Committee addresses and promotes legal and financial matters of common interest to the industry, such as creating model legal documents for use by start-ups, providing English translation of common legal forms, illuminating the industry's interests to public authorities such as the Patent Registrar, Companies Registrar, the Israel Tax Authority etc., providing enrichment programs for entrepreneurs. The committee comprises several main workgroups: Taxes, Israel Innovation Authority, and ESG policy, labour and model legal documents.

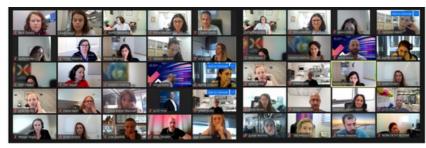
HR Global Work Group



Members of this workgroup are Human Resources VPs of MNCs and Israeli growth and mature companies. The workgroup provides an effective platform for professional peer consultation and industry research and surveys on issues such as human capital and diversity. The HR workgroup initiates and leads project that tackle challenges concerning the crucial HR asset in high tech. Specially this year, the work group focused on exploring the dynamic challenges which the industry is facing due to global & local economic slowdown and the war consequences on managing the industry human capital. This year we held a quaterly meetings at: Saleforce & Microsoft.

2023 Forums & Committees Quarterly Meetings

Diversity & Inclusion



Diversity & Inclusion Committee ועדת גיוון והכללה ועדת גיוון והכללה

IATI Diversity & Inclusion Committee aim to generate initiatives to to promote diversity and inclusion in the tech industry and meet the growing demand for engineers and C-level talents. we work with the government, companies, academic institutions, NGOs and diverse talent educate about this value and lead round tables, activities and events to promote it. This year we held for the first time a unique course for DEI managers. It was designed and built specifically for the high-tech sector, focusing on the unique challenges that exist in the local and global arenas, and connecting to the business dynamics in the field. The war brought new challenges regarding Arabs-Jews work relationships and emphasized the importance of our support to companies in the industry in that field.

committee Initiatives



A conference led by the IATI Diversity and Inclusion Committee and the Tel Aviv-Yafo Municipality.

For More Details



Tsofen Conference -Integration of the Arab Society in the Hi-Tech Industry in collaboration with IATI

For More Details



Skills & Tech - an economic-educational conference led by TheMarker in collaboration with Afeka College & IATI

2023 Forums & Committees Quarterly Meetings

Foreign Ambassadors Forum (FAF)





One of our main goals is to build and strengthen the bridges between Israel's tech industry and the global ecosystem. All foreign ambassadors to Israel are invited to meet on a quarterly basis to discuss the state of the industry, receive industry updates and briefings and nurture economy ties and relationships with Israel. This year quarterly meeting hosted over 50 Ambassadors & economic attaches at the Tel-Aviv Sourasky Medical Center. we also visited the Hemda Science Education Center in Tel-Aviv and presented the latest IATI's Reports: The impact of the tech sector on the Israeli economy & society Report 2023 (Deloitte); IATI Israel's Life Science Annual Industry Report 2022 (PwC) and The Global Cybersecurity Challenge (Elron Ventures). In Addition, we discussed opportunities for collaborations at our MIXiii Health-Tech.IL, the Annual Life Science Industry Conference. Through initiatives like the Foreign Ambassadors Forum we will continue to work towards advancing the Israeli tech ecosystem both domestically and internationally.

Up Coming Events 2024



Connecting Israel's Tech EcoSystem

Up Coming Events 2024



SAVE THE DATE



MIXiii Health-Tech.IL is the annual get together event for the Life Science & Health Tech Industries in Israel. The MIXiii Health-Tech.IL, organized and led by IATI, will take place at the International Convention Center – ICC Jerusalem on March 5-6, 2024. The Conference, organized by the industry and for the industry, consists of a conference, exhibition, B2B meetings, networking, and satellite events.

Exclusive 18%
Discount to IATI
Members- Contact
us for the code at
iati@iati.co.il

Event Registration

To the MIXiii website

IATI NEW WEBSITE

Launch of the new IATI website



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