ANNUAL REPORT 2018

START-UP
NATION
CENTRAL

In a region rife with challenges, Israelis have honed the art of problem solving and turned their small nation into a powerhouse of invention, creativity and resourcefulness. Israel's vibrant innovation ecosystem and deep technological know-how position it on the cutting edge of a wide range of fields, giving this undersized market a global reach.

Inspired by the best-selling book, *Start-Up Nation*, Start-Up Nation Central (SNC) is an Israel-based nonprofit organization that works to ensure the strength and vitality of the Israeli tech ecosystem—a crucial driver of the country's economic growth and global standing. SNC leverages its knowledge of the country's innovation sector to match the challenges of leading multinational corporations, governments, and NGOs with the Israeli technologies that can solve them. SNC's reach and impact center on three main pillars:

- **Connecting the world** to Israeli innovation and Israeli innovators to the world, with the goal of fostering long-term business relationships

- **Gathering knowledge** about the Israeli innovation sector and creating and distributing valuable research and insights

- **Engaging with the Israeli innovation ecosystem** to identify pain points and help create solutions in partnership with the industry

CONNECTING TO THE WORLD

KNOWLEDGE CREATION

ENHANCING THE ISRAELI INNOVATION ECOSYSTEM

FROM THE DESK OF EUGENE KANDEL, CEO

It is my distinct pleasure to present our partners with the Start-Up Nation Central 2018 Annual Partners Report, providing insight into SNC activities and achievements made possible by the generosity and guidance of our partners and the hard work of the SNC team.

On July 1st, 2018, SNC moved into its new headquarters on 28 Lilienblum Street, Tel Aviv. More than an office, these headquarters became a home not only for SNC but for the Israeli innovation ecosystem which we aim to strengthen through the hundreds of events we host annually. Our role as conveners of ecosystem stakeholders is illustrated in the very structure of our building. Two floors dedicated entirely to community activity provide ample space in which to increase cultivation of our focus sectors—Digital Health, Agri/FoodTech, and Industry 4.0. Our grassroots work is crucial to maintaining the vitality of the local tech ecosystem and increasing its impact on the global stage.

SNC activities fall under three pillars: Knowledge Creation, Connecting to the World, and Enhancing the Ecosystem. These pillars, as well as every one of our activities, are carefully selected to complement each other and reinforce a sustainable system.

The SNC team is poised for even greater impact in 2019, during which we plan to:

- Strengthen our research and insight-generation capabilities and scale our research output.

- Experiment with additional engagement models with multinational corporations, guiding them into substantive, long-term connections with Israeli innovators.

- Expand the Global Finder Network to facilitate access for Israeli innovators into target markets, while enhancing awareness of Israel's reputation in helping other countries to innovate.

- Streamline and enhance our Human Capital pilot programs, as we experiment with innovative proof of concept models for integration of underrepresented populations into the Israeli high-tech workforce—and pass them along to those who can scale them.

- Increase the number of opportunities to convene relevant stakeholders that have the power to promote community-development, cross-collaborations, and enhanced commercialization opportunities.

- Continue marketing Israeli innovation through online and traditional outlets, strengthening Israel's reputation as a source of solutions for the world's most pressing problems.

The SNC team is grateful for the support we receive from our continually growing dedicated group of partners whose vision constantly inspires and guides us. Our board—Terry Kassel (Chair), Paul Singer, Dan Senor, Karen Davidson, and Raphael Ouzan, our stellar community of partner foundations, and the team at The Paul E. Singer Foundation which generously dedicates its time and expertise to help us remain strategic, laser-focused, and efficient.

We are extremely grateful for the support our partners have provided for our mission and are inspired to continue our quest to make Israel an innovative nation helping others for decades to come.

Gratefully,

Professor Eugene Kandel

2018 HIGHLIGHTS

New Start-Up Nation Central Headquarters

The five-story glass structure and cutting-edge interior design of Start-Up Nation Central's new home in the heart of Israel's innovation ecosystem reflects the unique role that SNC plays in the Israeli tech sector. The lower floors of the building support the Israeli innovation ecosystem, offering event and workspaces, mentoring facilities, and rooms for meetups, conferences, lectures, and workshops. Engagements and events with multinational corporate, NGO, and government leaders are hosted on the top floors and the rooftop urban farm. The middle floors—where SNC itself resides—are the connecting tissue between the Israeli innovation ecosystem and the world that comes to engage with it.
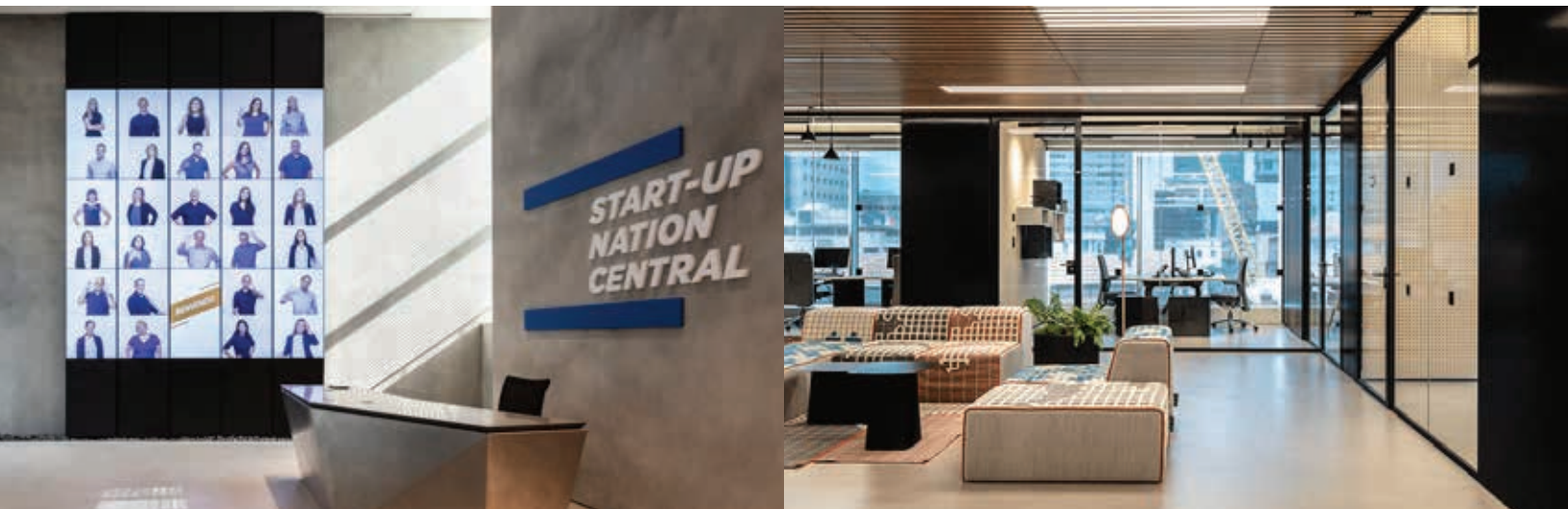
L28 Culinary Platform

Located on the ground floor of the building is the L28 Culinary Platform, an accelerator for innovative chefs creating new interpretations of Israeli cuisine. Named after its address on 28 Lilienblum Street, L28 serves vibrant, fresh, and locally sourced Israeli cuisine, prepared by up-and-coming young chefs who have each been given the opportunity to hone their craft in a six-month residency in the restaurant. Guided by an in-house culinary director, the chefs are given a full support package—an expert kitchen team, restaurant manager, marketing, and mentoring by some of Israel's leading restaurateurs to create dining experiences, form partnerships with the local culinary ecosystem, and engage a global community of foodies.
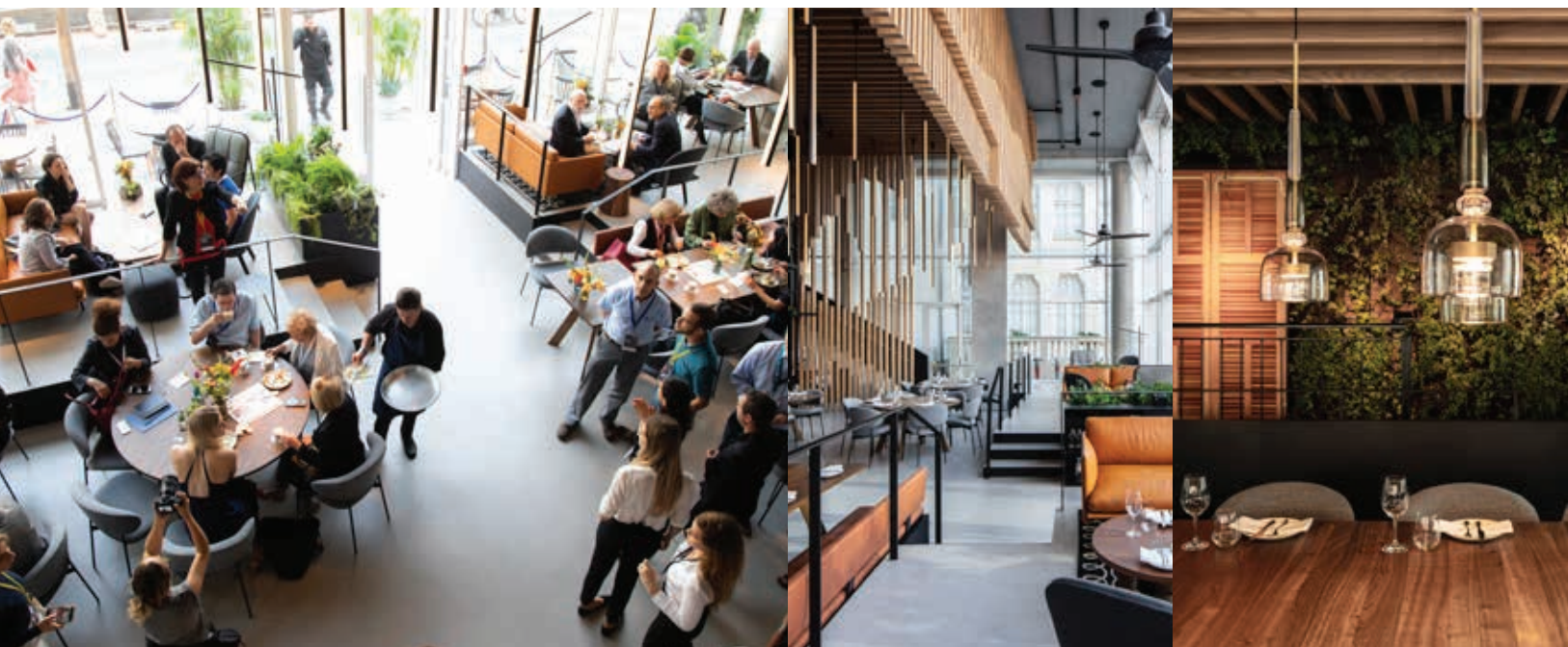
First Annual SNC Partners Summit and 28 Lilienblum St. Building Inauguration

Approximately 200 of our partners and friends came together for a full-day showcase of SNC and Israel's innovation ecosystem. These were presented through the stories and real-life experiences of the start-ups we work with, the international and Israeli customers who have made Israel an innovation hub, the brightest and most creative ecosystem stakeholders, and of course, our philanthropic partners.

Human Capital Programs Launch

SNC inaugurated it's first Human Capital initiative: the ExcellenTeam program for the enhancement of Arab and ultra-Orthodox human capital for the Jerusalem high-tech workforce, in partnership with President Reuven Rivlin. The event was hosted at Jerusalem tech company Mobileye, a key member of the SNC Human Capital Initiative coalition.

SNC Partners with the Kauffman Foundation
to Host Kauffman Fellows VC Summit in Israel

Two hundred and fifty Kauffman Fellows from around the world—the largest number of venture capitalists ever to come to Israel as a group—gathered to explore Gateways to Israeli Innovation. Participants enjoyed lightning talks on different aspects of Israeli innovation with leading personalities, innovation showcases, and When Tech Meets Tel Aviv—A Rolling Tour of the Israeli Innovation Ecosystem. Jerusalem, 3000 Years of Innovation included discussions with movers and shakers of the Jerusalem innovation ecosystem and ShukTech, a nocturnal innovation and culinary festival in the Mahane Yehuda market.

Academia Technologies on Finder

Launched in June 2018, Finder Academia now showcases close to 2,000 technologies developed in 17 Israeli university and hospital-based Tech Transfer Offices (TTOs), enabling users to track the journey of these new technologies.
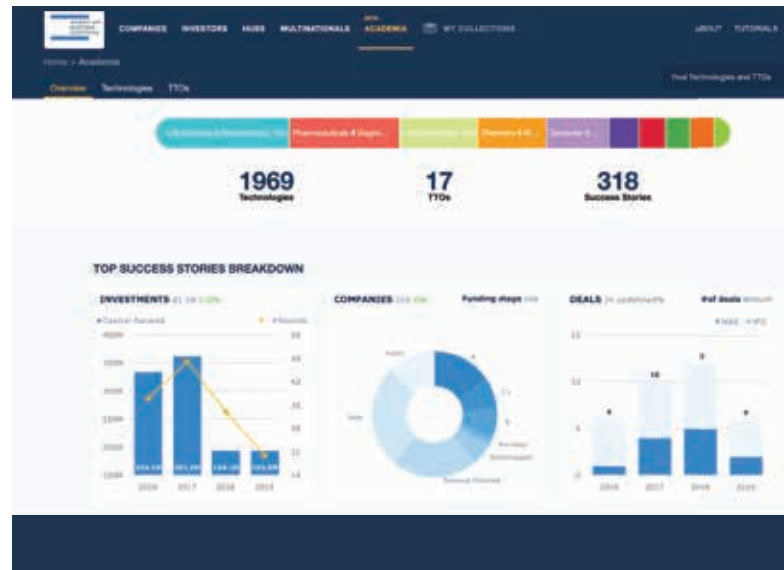
Global Finder Network Debut

Based on Finder's success, SNC launched the Global Finder Network (GFN) in 2018 with three partners: Thailand, New Zealand, and the state of Michigan. GFN aims to empower emerging innovation hubs across the world to build and manage their own ecosystem databases.

Jerusalem: Where Tech Meets Design

Hundreds of designers and entrepreneurs from across Israel joined SNC for three Jerusalem: Where Tech Meets Design events during 2018, magnifying the benefits that the tech and design sectors can gain from working together to create the most compelling products and user experiences.

KNOWLEDGE CREATION

At the core of all SNC activity is the publication of in-depth studies focused on key trends in the Israeli and global tech ecosystems. Insights derived from the Finder Innovation Discovery Platform (see page 14) and other sources are published and disseminated globally. The research and analysis teams inform all SNC work, including focus sector development, community building, and policy work.

2018 REPORTS

Israel's Fintech Industry Report offers a data-driven, comprehensive and up-to-date analysis of the Israeli Fintech ecosystem and its trends.

Israel's Cybersecurity Industry in 2018 Report reviews the current state of the Israeli Cybersecurity sector.

Israeli Industry 4.0 Special Edition Report reviews disruptive Israeli Industry 4.0 ecosystem solutions to global manufacturing challenges.

Israeli Agritech, prepared for Israel's Agri/FoodTech Week, summarizes developments in this Israeli sector.

Israel's Digital Health Industry 2018 Report analyzes the Israeli Digital Health sector and discusses emerging trends.
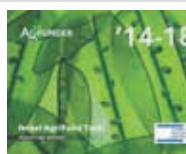
Israeli AgriFood Tech Investing Report reviews the state of Israeli AgriFoodTech in 2018.

Israeli High-Tech H1 2018 Report offers a comprehensive and up-to-date analysis of the state of the Israeli innovative high-tech ecosystem and its trends.

From Start-Up to Break-Through: Digital Health Adoption in US Healthcare Report, produced in conjunction with PwC Israel, offers a comprehensive digital health toolbox to help start-ups navigate the US healthcare system.

The State of the Israeli Ecosystem in 2018, SNC's first ever annual ecosystem report offers a comprehensive overview and analysis of the state of the Israeli high-tech innovation ecosystem during 2018.

Human Capital Survey Report 2018, produced in conjunction with the Israel Innovation Authority, aims to understand the degree of imbalance between the demand for tech talent and the supply in Israel.

CONNECTING TO THE WORLD

FINDER INNOVATION DISCOVERY PLATFORM

Start-Up Nation Finder is a proprietary open platform developed and maintained by SNC's dedicated team of researchers and information specialists, who ensure that it is the leading resource for comprehensive data on the entire Israeli tech ecosystem. Finder provides current information and insights on over 6,300 innovative companies and all of the investors, R&D centers, innovation labs, accelerators, incubators, hubs, and co-working spaces operating in Israel. New to 2018, Finder Academia provides a glimpse into technologies coming out of Israeli university and hospital tech transfer offices (TTOs).

Finder offers advanced search functions, a continuously updated graphical dashboard, and the ability to save, download, or send lists of companies. Interactive services include an introduction facilitation module, via which users can request to be introduced to any company in Finder. Introduction requests are reviewed by SNC staff and, if relevant, transferred to the requested company. The platform allows entrepreneurs to independently update company profile data. After verification, updates are published by the SNC Finder team.

2018 NEW FINDER ADDITIONS

963
new Israeli
companies
**(661 became
inactive)**

62
multinational
companies

46
hubs

80
investors

Over **2.7M** page views   25% increase in page views from 2017

67% of the traffic originated from abroad

Over 11,000 new registered users   from **120** countries

Finder Academia launched in June 2018 to showcase

17 Israeli TTOs, university- and hospital-based tech transfer offices.

Finder Academia enables users to track the journey of close to **2,000**

new technologies from conception to company.

GLOBAL FINDER

Based on Finder's success, SNC launched the Global Finder Network (GFN), empowering emerging innovation hubs across the world to build and manage their own regional ecosystem database to connect them internally and to the world. The GFN platform enables organizations to create opportunities for cross-ecosystem pollination and multilateral collaboration, share best practices, and connect directly with key individuals and companies in their country. Partners receive an established and constantly upgraded platform, methodology, training, best practices, and membership in what is fast becoming a global network.

2018 HIGHLIGHTS

Three partners joined the GFN in 2018:

Thailand via Sphere8, a joint venture established by two organizations: Hubba, a co-working space, and Infinity Technologies, a Singapore-based consulting firm specializing in innovation strategies.

New Zealand via Callaghan Innovation, New Zealand's equivalent of the Israel Innovation Authority that supports the local tech and innovation sector.

 Michigan via the Michigan Israel Business Accelerator, a nonprofit supported by the governor's office, The Paul E. Singer Foundation, and the William Davidson Foundation.

"Callaghan Innovation has adopted an Israeli database model for its newly-launched Scale-Up NZ information aggregation and collaboration system...The aim is to shine a light on our thriving innovation ecosystem, delivering accurate insights on ambitious, innovative New Zealand companies, removing information gaps that too often prevent our businesses from achieving their potential."

— Vic Crone, CEO, Callaghan Innovation

ENGAGEMENTS

Highly customized and expertly curated SNC engagements are a central tool for catalyzing collaborative efforts that strengthen the Israeli innovation ecosystem. After working with Fortune 1000 corporations, governments, and NGOs from around the world to identify their specific needs, SNC then connects these entities to the innovative Israeli solutions that best address them.

In 2018, SNC hosted an average of two weekly engagements. Typically two to three days long, the quality of these engagements and the impact they generate for strategic leaders have encouraged us to become highly selective.

After introducing corporate clients to the most relevant Israeli technologies, SNC continues to accompany and guide them on developing long-term connections with the Israeli innovation ecosystem.

2018 HIGHLIGHTS

362
meetings with
start-ups

51
engagements

28
innovation segments

170
ecosystem talks

7
extraordinary
projects

155
meetings with industry
experts and investors

2 R&D and Innovation Centers :

ABInBev

BNY MELLON

2 Local Liaisons:

AIRBUS

丸紅株式会社
Marubeni

23 POCs (proofs-of-concept or pilots)

7 Agreements:

AGRA
Growing Africa's Agriculture
⇄

CLARINS
⇄

ING
⇄
PayKey

AXA
⇄

VOITH
⇄
seeBo

Capital One
⇄
biScience

VOITH
⇄
CLAROTY

1 Center of Excellence:
Togo-BioFeed—working to create a "Center of Excellence" in Togo

Biofeed

SELECT 2018 ENGAGEMENTS

Long-Term Engagements: Spotlight on AXA

AXA is one of the largest insurers in the world with annual revenues of over 100 billion euros. SNC's partnership with AXA began in 2016, when it hosted AXA Strategic Ventures and Kamet (AXA's innovation arm) teams. During the visit, SNC introduced AXA to a wide variety of Digital Health and Fintech solutions and presented different operational models that would enable them to connect with the Israeli innovation ecosystem. As a result of this visit, AXA launched a start-up competition in collaboration with Jerusalem Venture Partners on Insurtech and held several community events.

SNC continued to develop its relationship with AXA, introducing it to different stakeholders in the Israeli ecosystem and promoting their continuing relationship with the local market. In 2017, as a culmination of a year-long partnership, SNC hosted AXA's Chairman of the Board and CEO, as they officially announced the opening of Kamet in Israel, which had until then only had a presence in London and Paris. During the visit, SNC hosted a cocktail event attended by leaders and industry experts in the Israeli high-tech ecosystem, creating an opportunity to learn about a variety of innovations and meet leading players.

Dozens of Israeli companies are now participating in Kamet's program, and company is actively searching for additional collaborations.

In 2018, SNC hosted AXA's Chairman of the Board and CEO once again as they explored possibilities for expanding the company's presence in Israel, mainly in the areas of Digital Health and Life Science. As a result of this visit, Kamet established a relationship with Sheeba Tel Hashomer, one of the leading hospitals in Israel, and joined the new Innovation Hub Sheeba is building, expanding their activities to the Digital Health sector.

In 2019, SNC will host a fourth engagement with AXA: 40 top executives will visit SNC as part of their annual offsite visit, to explore new horizons for AXA in Israel and to continue forging strong ties between the company and the Israeli ecosystem.

Dow Chemicals

In 2018, SNC hosted three delegations from Dow Chemicals (now DowDuPont), the world's second-largest chemical company. In May, SNC hosted a delegation of Dow R&D executives during AgriWeek, introducing them to over twenty-five start-ups and to the first AgriTech accelerator in Israel, Yakhin Impact. In October, SNC hosted a second delegation of Dow executives during the Industry 4.0 Conference (see page 37), and finally, in November, SNC hosted the EMEA CTO of Dow, focusing on chemical R&D and potential models for entering the Israeli ecosystem, and has since continued to actively assist Dow's Managing Director in Israel to explore these models.

Fonterra

SNC hosted a digital engagement as part of its long-term engagement with the company, introducing them to four start-ups and an innovation lab. Fonterra is responsible for approximately 30% of the world's dairy export and sets the benchmark for global dairy prices. The company was interested in exploring collaboration in existing areas of business as well as new product development.

BUILDING BRIDGES

SNC builds strong bi-lateral bridges in key geographical markets and sectors, allowing for a free bi-directional flow of challenges, ideas, solutions, and collaborative efforts. SNC is active in markets where three conditions are met:

· The target market offers significant economic opportunities for Israeli companies and the entire ecosystem

· Smaller Israeli companies have difficulty penetrating the market, enabling SNC to utilize economies of scale and superior information and access

· SNC finds a trusted partner in the target market, providing access to key local stakeholders and significant exposure to their challenges, which can raise their interest in Israeli technologies and certify successes

Once these three conditions are met, the flow of challenges and solutions is initiated. SNC serves as the Israeli anchor, providing access to local technologies. A trusted partner anchors the other side, exposing challenges and facilitating the implementation of identified solutions.

"Israel, widely acknowledged as a world leader in agricultural development — Start-Up Nation Central counts around 525 currently active innovative Israeli Agritech companies—has stepped forward to transfer appropriate technologies and practices to partners across Africa. It's a win-win for both Israel and Africa."

— Dr. Agnes Kalibata, President, Alliance for a Green Revolution in Africa (AGRA)

BRIDGE TO HOUSTON, TEXAS

Landing Pad for Israeli Digital Health

Israeli Digital Health companies have traditionally tended to view New York and Boston as the most attractive U.S. landing pads for their technologies, partially due to a lack of familiarity with other potentially receptive locales. SNC, in partnership with a local, on-the-ground entity, has begun developing a landing pad for Israeli innovation at the Texas Medical Center (TMC)—the largest medical center in the world. Home to 56 hospitals and clinics, TMC includes the world's largest children's and cancer hospitals. By identifying the most relevant technologies, models, and know-how that can be utilized to address TMC's pain points, the project will increase awareness of Houston as a potential market for Israeli companies while promoting Israel as a leading healthcare technology player in Houston.

2018 HIGHLIGHTS

An SNC delegation led by CEO Eugene Kandel visited the Texas Medical Center in early 2018. The team met with C-level executives at leading TMC hospitals—MD Anderson, Baylor College of Medicine, Rice University, and Texas Children's Hospital—to discuss potential partnerships.

Texas Children's Hospital (TCH) has included collaboration with Israeli companies in its 2019 strategic plan and has established a steering committee with physicians from across the hospital to identify its needs. SNC and TCH have formed a cross-organizational committee to discuss those pain points and streamline a process to introduce Israeli technologies to address them.

Three Israeli companies are amongst the 20 companies chosen to be part of the 2019 **TMCx**, Texas Medical Center Accelerator, more than from any other non-U.S. country. Forty Israeli companies applied for this cohort, significantly more than in all six previous cohorts combined.

Bio-Bridge Program: SNC is working with the TMC CEO and his executive team to begin outlining a formal program to bridge the Israel and Texas medical-tech ecosystems to facilitate greater research and development collaboration, commercialization, and clinical trials.

From left: Deborah Hochberg, Director of Strategic Partnerships, The Paul E. Singer Foundation, Former SNC Strategic Sectors Director Tal Harmelin, SNC CEO Eugene Kandel, SNC Partner in Houston, Gary Rosenthal, and Digital Health Sector Lead Sharon Shapira on SNC's first visit to Houston.

BRIDGE TO INDIA
Landing Pad for Israeli Digital Health and Agri/FoodTech

Israeli innovation in the water, Agri/FoodTech, and Digital Health sectors is in great demand worldwide. However, trade between Israel and India—which faces many challenges in these areas—stands at only $4B annually, compared to $70B in Israel-European trade. Cultural and bureaucratic barriers related to working in the Indian market have discouraged Israeli innovators from doing business there. SNC has developed concrete relationships, opportunities, and unique models to help Israeli start-ups penetrate and expand in the Indian market. One such model is an individualized mentoring program, developed in partnership with the Israel Innovation Authority and the Pears Foundation, that will pair start-ups with veteran Israeli companies with experience working in India. In 2018, SNC hosted eighteen government, corporate, and nonprofit delegations from India.

2018 HIGHLIGHTS

Israeli Prime Minister's Visit to India

SNC's Executive Director Wendy Singer and Strategic Countries Director for India Vered Mivtzari joined the business delegation accompanying Israeli Prime Minister Benjamin Netanyahu to India in January 2018. The delegation of senior Israeli government officials and businesspeople included 25 start-ups. While there, SNC delivered a keynote address on the main delegation panel in New Delhi and participated in a forum of Indian and Israeli CEOs, focusing on practical ways to ramp up the connectivity between the ecosystems.

AgriTech Proof of Concept Project:

SNC partnered with organizations that have extensive reach into the Indian Agriculture market to enhance business collaboration and interaction in India.

- The **Groundwork BioAg** and SNC signed a memorandum of understanding to conduct two agricultural pilots with Israeli solutions as part of Syngenta's Agri-Entrepreneur (AE) model (see additional information on the Syngenta Agri-Entrepreneur (AE) model on page 29). Groundwork BioAg, one of the chosen companies, aims to increase agricultural yield by covering the world's arable land with "good" fungi that form symbiotic relationships with plants. The pilot will be implemented in Andra Pradesh.

- SNC is planning three pilots in the energy, water and agricultural sectors with the **iCreate International Center for Entrepreneurship and Technology** in Gujarat Pradesh. These will include Israeli start-ups **Biofeed**, which enhances 'green' pest control to replace spraying; **Aqwise**, the developer of innovative biological water and wastewater treatment solutions for the industrial and municipal markets; and **Chakratec**, which facilitates the deployment of fast charging stations anywhere, including locations with a weak grid.

- SNC partnered with **ARNA**, an organization that strives to improve people's lives through technology and innovation, and **Jai Kisen**, an Agri/FinTech platform that provides timely and low-cost financing for farmers' agricultural needs, to create a pilot project to introduce Israeli solutions to the Indian market. Two pilots are planned in Punjab Pradesh with Israeli start-ups **AgriTask**, an Ag-management platform that uses smart tools for planning and decision making geared at Agri managers, and **Smart Fertilizer**, a decision support platform for optimizing fertilizer use for agriculture, enabling growers to maximize crop yields, cut costs, and increase profits.

Signing of MoU with AHPI, August 2018. In front row: Prof. Eugene Kandel and Vered Mivtzari, SNC, Maya Kadosh, Israel's Deputy Chief of Mission to India and Dr. Girdhar J. Gyani, Director General of AHPI.

Digital Health Proof of Concept Project

SNC signed a memorandum of understanding with **AHPI** (Association of Healthcare Providers (India), India's private hospital organization, to assist Israeli companies in conducting proofs of concept in hospitals and clinics with the goal of penetrating the Indian market. Pilots will be conducted by Israeli start-ups **HeraMed** and **Beecardia**, in three private Indian hospitals. A steering committee of hospital directors, led by SNC and AHPI, was established to oversee this project.

BRIDGE TO AFRICA

Landing Pad for Israeli Digital Health and Agri/FoodTech

Many African farmers suffer from extremely low productivity and high post-harvest losses. Consequently, their income and savings levels do not allow them to invest in simple technologies or better seeds that could potentially increase their income. These financial barriers are compounded by small farming parcels that do not allow for economies of scale, and limited access to information and a chain of intermediaries from farm to market that profit at the expense of the farmers. SNC has begun establishing a network of strong on-the-ground partner organizations to help create infrastructure to facilitate processes to enable Israeli technologies to reach African farmers.

2018 HIGHLIGHTS

SNC signed an letter of intent with the **Alliance for a Greener Africa (AGRA)**, an organization that helps African farmers identify and design tailored solutions to boost and sustain increased production, gain rapid access to growing agriculture markets, and create bridges for implementing Israeli technologies in AGRA's focus countries.

The **Syngenta Foundation**, an organization that helps farmers adopt improved production technologies for better productivity and higher income, signed a memorandum of understanding with SNC to tailor Syngenta's Agri-Entrepreneur (AE) model for Africa, particularly Kenya and Rwanda, by implementing Israeli technologies. The model follows a decentralized approach, empowering young people in rural areas to play an active role in regional agricultural development.

SNC is working with **Goodbye Malaria**, an African organization that aims to eradicate malaria in Mozambique. A commitment from the Gates Foundation has enabled Goodbye Malaria to engage SNC to introduce its local partners to relevant Israeli technologies.

"A four-person delegation from Africa visited Israel this week to see how agricultural technologies developed in the Startup Nation can help farmers in Africa. Led by Agnes Kalibata, the president of the Alliance for a Green Revolution in Africa (AGRA), the group was hosted by the nonprofit organization Start-Up Nation Central and met with representatives from Israel's tech industry and government officials."

— **Times of Israel**, August 1, 2018, Delegation seeks Israeli startups to help African farmers boost crops

ENHANCING THE ISRAELI INNOVATION ECOSYSTEM

FOCUS SECTOR DEVELOPMENT

As part of SNC's objective to cultivate and develop the Israeli ecosystem from within, the organization has chosen to invest considerable resources in promoting the maturation of three focus sectors—Digital Health, Agri/FoodTech, and Industry 4.0—by reducing the gaps and challenges they face in collaborating with multinational corporations and international ecosystems.

DIGITAL HEALTH

SNC's Digital Health efforts focus on exposing the over 500 Digital Health companies operating in Israel today to new markets and partners, while also narrowing the knowledge gap for Israeli companies entering the international healthcare arena. This is done by maintaining a comprehensive, informative, and easily-accessible mapping of the Israeli Digital Health sector and by leveraging the talents and connections of relevant business leaders, investors, medical professionals, academics, and government officials.

2018 HIGHLIGHTS

SNC, in partnership with the Israel Prime Minister's Office and the Ministries of Finance, Health, Social Equality, Economy, and Science and Technology, mapped the existing landscape and its challenges and proposed the **National Plan for Digital Health.** This NIS 1B plan seeks to position Digital Health as a national growth engine by boosting technological development, international cooperation, concentrated academic and industrial efforts and regulatory changes to encourage data research.

In January 2018, SNC and PwC launched **From Start-Up to Break-Through, A Comprehensive Toolbox for Digital Health Start-Ups,** a collection of guidelines, tools, and survey data created to help Digital Health start-ups overcome barriers to entering the U.S. market. The toolkit led to a series of in-depth workshops designed for Israeli Digital Health companies, presenting information on international healthcare system structures, needs, and incentives.

SNC partnered with the **Digital Health Today** podcast to create a series of podcast episodes featuring Israeli innovation in the digital health space.

The first episode was released in July 2018 and featured SNC's General Manager Guy Hilton speaking about the Israeli Digital Health sector, and Eliav Rodman explaining artificial vision start-up OrCam's technology. The second episode was released on September 25, 2018 and featured Dor Skuler from Intuition Robotics and Assaf Sella from Kytera speaking about AI solutions to maintain and monitor health.

Digital Health Conferences

SNC co-sponsored the **2018 BeWell.il Digital. Health.Now** conference, a joint venture of the Israel Innovation Institute, Israel's Ministry of Economy, and the Ministry of Social Equality. Aimed at promoting the development of digital health innovation to improve Israel's healthcare services and create a competitive advantage for Israeli companies worldwide, the event attracted hundreds of participants from across the ecosystem—health organization officials, start-ups and entrepreneurs, industry executives, investors, academic leaders, and students.

SNC is a co-founder of the annual **DigitalHealth.il** conference, produced in partnership with Ernst and Young Israel and the Israel Advanced Technology Industries (IATI), and has served on the conference steering committee for the past five years, helping to curate content and speakers.

Research and Insights

More *2018 Reports* on page 12-13

There are more than **500** Digital Healthcare companies in Israel

ASSISTIVE DEVICES

AngelSense
iphope
ORCAM
voiceitt
SESAME ENABLE

DIGITAL THERAPEUTICS

Intendu. sleeprate sweetch DAY TWO

VRHealth helparound NiNiSpeech

NG

MyndYou Datos
natix oxitone

ASSISTIVE DEVICES

DIGITAL THERAPEUTICS

DIAGNOSTICS

PATIENT ENGAGEMENT

UPDATED: JANUARY 2019

MeMed
Healthy.io

PATIENT ENGAGEMENT

BELONG LIFE
vaica
NEURA
ValeraHealth
Medisafe
Telesofia
Water.IO
Medorion

INDUSTRY 4.0

There are currently over 200 Israeli Industry 4.0 companies - double the number that existed five years ago. The sector has attracted significant investment with median round funding in 2018 at $8M, double what it was one year ago. These figures indicate that the sector is growing, but still needs a push to reach a critical mass and global recognition.

Having recognized the potential of Israeli innovation to solve the most critical challenges of industrial companies around the world using smart sensors, AI, computer vision, cybersecurity, and automation processes, SNC is working to build the local Industry 4.0 community and connect global industrial corporations to Israeli technologies.

2018 HIGHLIGHTS

Industry 4.0 Community Building

SNC created the Israel Industry 4.0 Community online knowledge-sharing platform, and initiates regular community meetings and conferences, featuring representatives of industrial multinationals such as Abacus Alpha, ABB, Dow Chemicals, IFB Technologies, Merck, Mondelez, National Grid, Rockwell, SAR Group, and Utilligent.

Conferences

In October 2018, SNC, in partnership with Grove Ventures, a leading early-stage Israeli VC, organized the **Beyond Man and Machine** conference, which brought over 450 global industry leaders, MNCs, start-ups, and experts together to display the latest Israeli and international Industry 4.0 developments, insights, and cutting-edge technologies.

SNC played a key role in the **FreighTech 2018** annual conference, which brought together an exclusive forum of top logistics providers and carriers executives from around the world for an exchange of practical, real-world thoughts on innovation.

Ecosystem Success Stories

SNC's Industry 4.0 team continues to work to build connections with large industrial corporations from around the world and bring them to Israel to connect with local innovation. Successes in 2018 include:

- GiTV, a Japanese investment entity, was introduced to **Kitov Systems**, an Israeli 3D Quality Control Systems start-up at the 2017 Industry 4.0 Start-Up Competition initiated by SNC. GiTV invested $1M in Kitov. Hahn, a German industrial automation and robotics group, was also introduced to Kitov by SNC and invested $9M.

- SNC introduced Toho Technology, a Japanese distribution and manufacturing company to **CoreTigo**, an Israeli Industrial IoT Wireless Platform start-up. This led to a partnership contract between CoreTigo and Toho, which has been key to CoreTigo's penetration of the Japanese market.
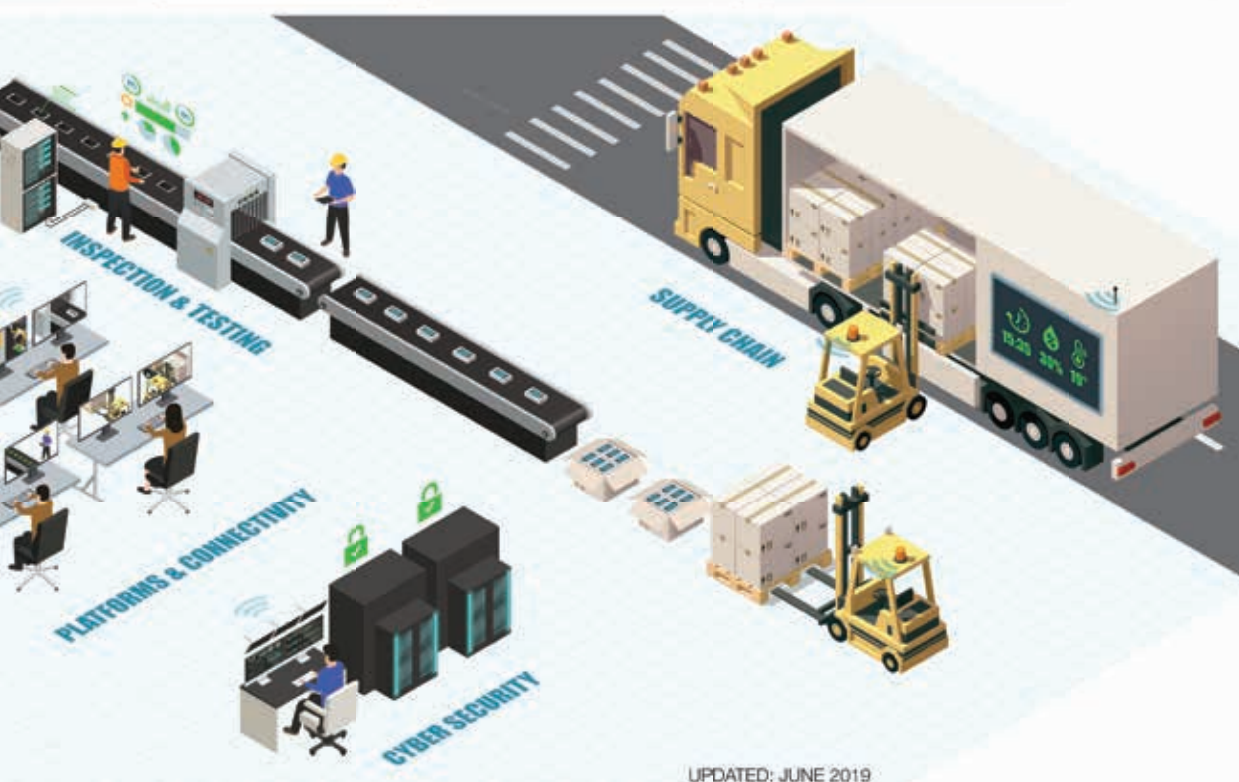
Research and Insights

More *2018 Reports* on page 12-13

ISRAELI INNOVATION: INDUSTRY 4.0

There are more than **200** innovative Industry 4.0 start-up companies in Israel

ROBOTICS

AIROBOTICS
cognimine
PERCEPTO
RoboTiCan
DLR   BEYON3D

INSPECTION & TESTING

SITEAWARE
vHive
YORAN Imaging   Qsee
edgecase.ai   astralink
INSPEKTO   KITOV

SUPPLY CHAIN

Bionic HIVE   BT9   caja   Highcon
NOVICED   LOGINNO   CONTGUARD
CartaSense   VARCODE   pzartech
BRINGG   hoopo   Progressive Labs

BIG   iotech   LEO Lane   Assembrix

SUPPLY CHAIN

INSPECTION & TESTING

PLATFORMS & CONNECTIVITY

CYBER SECURITY

UPDATED: JUNE 2019

PLATFORMS & CONNECTIVITY

ATOMATION   seebo
WONDERLOGIX   rayven
CoreTigo   JUMPER
mPrest   FOURTEC   axonize

CYBER SECURITY

HALO DIGITAL   CyWat   SIGA   CLAROTY
Indegy   VDOO   SCADAfence
radiflow   OTORIO   Terafence
SECURITHINGS   CyberX   WATERFALL

AGRI/FOODTECH

The Finder Agri/FoodTech sector currently contains around 750 companies; 500 are active in AgriTech, and 250 are active in FoodTech.

The Israeli agricultural sector was born out of the dire necessity to grow "more with less" during the country's formative years. Over time, and with the support of academia and government, this know-how was refined into cutting-edge technologies. SNC creates meaningful impact on the sector's growing ecosystem through mapping, community events, and strategic engagements.

2018 HIGHLIGHTS

Agri/FoodTech Community Building

Together with the Ministry of the Economy and the Israeli Innovation Institute, SNC established the **GrowingIL** community that conducts regular meetups for the Israeli AgriTech ecosystem. To aid the community, SNC launched two new platforms. A **Global Accelerators Gateway** online platform showcases 70+ leading AgriTech-focused accelerators and enables start-ups in the sector to easily identify relevant programs to speed their maturation. An **Investors' Platform** for international Agri-focused VC investors was launched in 2018 to expose Israeli AgriTech companies.

SNC, together with Yissum, Hebrew University's Tech Transfer Office (TTO) launched an **Agri-Innovation Course** aimed at strengthening ties between academia and the industry, developing students' entrepreneurial skills, offering mentorship opportunities, and providing students with the tools to monetize their research. At the conclusion of the first cohort, two students had developed proofs of concept.

Agri/FoodTech local meetups included workshops on fundraising skills, an agriculture supply-chain workshop, one-on-ones for start-ups with leading AgriTech corporates (BASF, ICL, Unilever, Frutarom, Hazera, Mehadrin and IBM), investor meetups, go-to-market meetups (focusing on Australia, India and Brazil), as well as a Women in AgriTech forum.

Conferences

Agri-Food-Tech Week: Taking place in May 2018, the week showcased Israeli innovations in the Agri/FoodTech industry with several events:

- **FoodTech IL** brought together 800 attendees, including entrepreneurs, investors, food industry executives and government officials for a one-day event, which included a start-up contest.

- The one-day **AgriVest** conference hosted entrepreneurs, industry leaders, and investors to nurture opportunities for global partnerships and collaborations.

- The 20th International Agro Technology Exhibition & Conference, also known as **AgriTech**, is one of the world's largest and most important conferences in the industry. 2018's AgriTech event focused on the challenges related to agriculture in arid climates, and achievements towards enabling efficient farming.

  SNC played a major role in leveraging the week's events to bring value to the ecosystem at large. SNC hosted a VIP cocktail event as well as a community event focused on exposing the local investors landscape, provided content for all three events (Food-Tech.IL, AgriVest and AgriTech), judged a competition, and gave the keynote address at AgriTech.
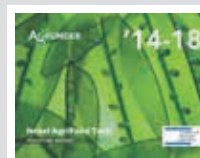
Ecosystem Success Stories

SNC's Agri/FoodTech team works to build connections with investors and multinational corporations around the world to bring them to Israel to connect with local innovation. Successes in 2018 include:

- Migros, Switzerland's largest retail company, invested in Israeli FoodTech start-up **Innovopro**.

- AGrow Ventures, an investment company and go-to-market platform that aims to bring Israeli technology to the Californian market, invested in Israeli water-tech start-ups **Aquanos** and **AgRobics**.

Research and Insights

More *2018 Reports* on page 12-13

Israel has over **500 AgriTech start-ups** and companies. **50%** of them

PROTECTION

MACHINERY & ROBOTICS

POST-HARVEST

MARKET LINKAGES

LIVESTOCK

ALTERNATIVE FARMING

UPDATED:
DECEMBER 2018

250 Israeli FoodTech start-ups are cooking up solutions for hig

...her quality, healthier and more sustainable food, and other culinary innovations.

FOOD SAFETY & QUALITY
mobio · Resorcix · OlfaGuard
vBact · allerguard · unispectral
yarok · NanoAF · BactuSense
Bio-Fence · Atlantium · freshpoint

PACKAGING SOLUTIONS
ClingTap · Valentis
ECOPACK · FRESHKEEP
GreenSpense · TIPA

FOOD SUPPLY CHAIN
COMMONSENSE ROBOTICS · VIBE
fooddos · trellis
NOVICOD · VARCODE
YORAN Imaging · CartaSense · BT9

SMART INVENTORY & STORE APP
TRACKPOINT
trax
vayyar

FOOD E-COMMERCE
EatWith · superup
mySupermarket
Tapingo · Crazy
Shopeat

FOOD AS MARKETING
Icebow
Talking Bread
ripples · Pie & Cake

COMMUNITIES

Supporting and strengthening Israel's tech communities is essential to bringing the innovation ecosystem to its next level of maturity, which, in turn, serves to maintain Israel's leading position as a global innovator. SNC focuses on creating initiatives and programs that foster networks of Israeli entrepreneurs, increasing their connectivity to each other and to the ecosystem, and building their capacity to enter the international arena. Two full floors of SNC's headquarters serve as a home for the activities of the Israeli tech community and key ecosystem stakeholders—academic research and development institutions, multinational corporations, and investors. Particular emphasis is placed on creating activities to support its focus sectors—Digital Health, Agri/FoodTech, and Industry 4.0—alongside additional verticals, as well as identifying specific focus groups that require attention.

2018 HIGHLIGHTS

Focus Sector Community Development

- The **GrowingIL** AgriTech community was launched by SNC in partnership with the Israeli Ministry of Economy and Industry, the Ministry of Social Equality and the Israel Innovation Institute (see page 39 for more details).

- The **II4 Community** (Israel Industry 4.0) was launched, aimed at preparing Israeli start-ups in the sector to take on global industrial challenges (see page 36 for more details).

- SNC continued its support of the **BeWell.il** Digital Health community which focuses on connecting Israeli start-ups to the Israeli health sector (see page 33 for more details). SNC has also hosted such events as the Digital Health CEO forum for start-up leaders and the IDF health services privatization brainstorm session.

L28—A Home for Tech Communities

Some of the communities SNC was able to support thanks to its new offices at L28 and its community spaces are:

Municipal Development

Studies have shown that municipalities are uniquely positioned to help implement and grow innovation. With proximity to local start-ups and an open door to government decision makers, municipal innovation leaders are able to secure funding and resources for their local ecosystems. However, these municipal managers mistakenly believe that they are in competition with other cities, resulting in intercity rivalry that weakens the Israeli innovation ecosystem rather than helping it to grow. Following three very successful quarterly forums in 2018 with municipalities from Haifa to Eilat, SNC will continue to grow this area of activity in 2019.

JERUSALEM

Jerusalem is home to 480 tech companies, 23 R&D centers, and 25 venture capital funds; with a cumulative $180M invested in 2018.

SNC's Jerusalem-based work strengthens and grows the city's technology sector by piloting new programs. Successful models serve as pilots for other cities in Israel, and even abroad.

SNC strategies in Jerusalem include: (1) Convening key Jerusalem tech stakeholders to create a unified strategy for strengthening the city's ecosystem; (2) Increasing exposure of the city's tech sector to international corporations, investors, and government leaders from abroad; and (3) Helping to amplify Jerusalem's technology successes; including marketing and media stories about specific sectors of excellence.

2018 HIGHLIGHTS

Convening key Jerusalem tech stakeholders to create a unified strategy for strengthening the city's ecosystem

The Jerusalem Tech Forum was launched in 2017 to create a unified strategy for the city's tech sector with municipal, national, and global partners. The Forum, comprised of over two dozen key stakeholders representing Jerusalem's government, academia, and later-stage professionals of different fields in the high-tech sector, meets quarterly to address the main challenges facing the Jerusalem tech ecosystem and collaborate around solutions.

SNC convened the **Academic and Industry Working Group**, comprised of Tech Transfer Office directors from the Hebrew University, Bezalel Academy of Art and Design, and Azrieli College of Engineering. The group went on to create the JLMImpact Consortium, which won a NIS 20 million Counsel for Higher Education tender to establish a Hebrew University-based entrepreneurship

center, HUJI Innovate. The center is tasked with boosting entrepreneurial activity among the city's students and academic community and connecting Jerusalem-based tech companies to the city's TTOs.

The Human Capital Working Group, born from the HR Professionals Forum, identified the difficulty Jerusalem tech companies have in finding and retaining tech talent. The group worked with the Jerusalem Development Authority and the nonprofit New Spirit to create an HR platform to advertise job openings in JLM tech companies, due to launch in mid-2019.

SNC joined forces with Hebrew University and other partners to launch a pilot **Lean Launchpad** bootcamp for entrepreneurs. SNC secured permission from Lean Launchpad curriculum creator and bestselling author Steve Blank to bring the program to Jerusalem. Hebrew University hosted the first cohort, dedicated to life sciences companies.

"The ecosystem thrives on close collaboration between leading academic institutions and the innovation community, providing start-ups with top talent and breakthrough research, building the basis for Jerusalem's excellence in specific startup sub-sectors."

— 2018 Startup Genome Report

Increasing exposure of the city's tech sector to international corporations, investors, and government leaders from abroad

SNC hosted 250 Kauffman Fellows from around the world as part of the three-day **Kauffman Fellows VC Summit**, the largest number of venture capitalists ever to come to Israel as a group. SNC JLM curated Jerusalem: 3000 Years of Innovation, a full Jerusalem day for the fellows during which they met with then-Mayor Nir Barkat and Education Minister Naftali Bennet—both of whom played important roles in the Israeli high-tech ecosystem before embarking on political careers. Leaders and entrepreneurs representing Jerusalem-based companies (Mobileye, Orcam, 6Degrees) and initiatives (PICO Jerusalem, ALYNnovation) presented some of the city's solutions to the world's most intractable problems, with a focus on rethinking pharmaceuticals and assistive technologies.

The **Jewish Funders Network** held a pre-summit day in Jerusalem, exposing members to the challenges the city faces, and to some of the most innovative solutions being put forward by various organizations. SNC was invited to curate the Human Capital segment for the day. This entailed a panel session with key Jerusalem stakeholders who partnered with SNC on its Human Capital initiatives, and talented Haredi (ultra-Orthodox) women and Israeli Arabs coders struggling to find their professional way in the Jerusalem tech sector.

Helping to amplify Jerusalem's technology successes; including marketing and media stories about specific sectors of excellence

Jerusalem: Where Tech Meets Design is a series of events highlighting the nexus point between the city's tech and design worlds. Jerusalem's flourishing tech sector and world class design schools uniquely position it to drive this conversation. Produced by an SNC-led coalition, including the Jerusalem Development Authority, Bezalel Academy of Arts and Design, HUJI Innovate at the Hebrew University, and New Spirit, three Tech Meets Design events took place during 2018. Hundreds of designers and entrepreneurs from across Israel joined SNC for lightning talks that magnified the benefits that the tech and design sectors can gain from working together to create the most compelling products and user experiences, and 250 participants attended the central event, **"A Designful Future"**, which took place in November.

Notable Press Coverage—SNC sponsored and produced the article, **"Can Jerusalem be turned into a high-tech hub?"** in partnership with the JTA, an international news agency that disseminates content to media outlets around the world. The article discussed Jerusalem's budding tech scene, recognized by Startup Genome's Global Startup Ecosystem Report as a "rising star on the global start-up scene" and spoke of Jerusalem's unique positioning to provide a much-needed influx of diversity and dynamism to the tech community.

HUMAN CAPITAL INITIATIVE

To retain its current position in the global high-tech ecosystem, Israel's tech sector must grow at a far faster rate than it has in the past few years. The main obstacle to this growth is a lack of skilled talent. According to SNC's 2018 Human Capital Survey Report conducted in collaboration with the Israel Innovation Authority and the JPMorgan Chase Foundation, there are at least 15,000 unfilled positions requiring mid-to high-level programming and algorithmic skills. Without a critical infusion of human capital, the ecosystem is likely to fall behind in the global economy, jeopardizing Israel's economy and security.

- Approximately 8% of the Israeli population currently participates in the high-tech sector. Of these, 75% are Jewish (non-Haredi) males, who constitute only 38% of the general workforce.

- According to Israel's Labor and Social Services Ministry, women are "the most underrepresented group" in the high-tech industry. This is particularly true with regards to programming positions, where only one in every four coders is a woman. Despite the national effort to increase the number of high school students majoring in mathematics, female students constitute only 32% of students matriculating in computer sciences. This may explain why only 27%

of programmers and 12% of cyber service personnel are women even though a similar percentage of men and women express a desire to serve in cyber-related IDF units. It is therefore hardly surprising that women comprise only 26% of the high-tech workforce.

- Haredi men and women comprise less than 1% of the high-tech workforce, despite the fact that hundreds of Haredi women graduate from computer science programs every year.

- Although Israeli Arabs currently comprise 18% of computer science students in Israel, they represent less than 2% of high-tech employees.

Demographic composition of the general Israeli workforce

- 4.2%
- 17.4%
- 38.2%
- 40.2%

Demographic composition of the high-tech workforce

- 1.4% 0.7%
- 23.8%
- 74.1%
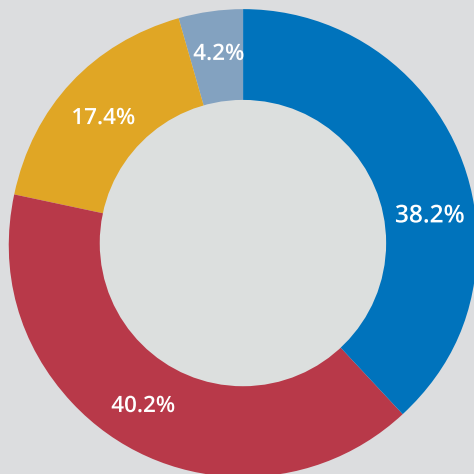
▮ Men (other)   ▮ Women (other)   ▮ Arabs   ▮ Ultra-Orthodox
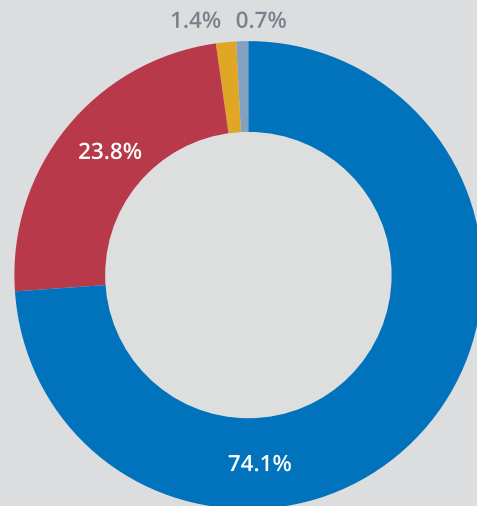
Clearly, bridging the employment gap requires the introduction of a wider spectrum of Israeli society into the sector. With the help of sector experts, SNC has analyzed the barriers preventing these underrepresented populations from reaching their employment potential. In response to these findings, SNC developed and began to implement specially designed interventions to fast-track these populations into Israel's tech ecosystem.

EXCELLENTEAM:
POST-ACADEMIC INTERVENTION

While a computer science degree provides a good foundation for the programming field, there is usually some dissonance between academia and practical industry skills. Men and women who have gained experience in the military or pre-military civilian life compensate for this lacuna. In contrast, Arab and Haredi college graduates, many of whom study in sectoral education systems and do not serve in the military, are at a clear disadvantage, lacking both pre-college hands-on experience and the requisite networks and skills to navigate the job market.

In 2018, SNC and The Russell Berrie Foundation launched ExcellenTeam—a 4-month bootcamp aimed at integrating Jerusalem-based Arab and female Haredi computer science college graduates into the high-tech industry and changing their perceptions about their ability to be core tech sector developers. The program was developed in partnership with leading high-tech companies—Google, Mobileye, Ex Libris, Lightricks, and 40Nuggets—and a coalition of subject-matter experts, philanthropists, training institutes, government decision makers, who understood, as we did, the need to invest in innovative programs to address this issue.

The pilot program, which launched in Q3 2018 with 20 Arabs and 22 Haredi women participants, will graduate approximately 250 students in six 4-month cohorts, with parallel classes for Haredi women and Arab men and women. Placements for graduates of the first cohort will take place in 2019.

"We are taking risks, but the greatest risk of all would be not to seize the momentum of the Jerusalem tech sector and the talent of people who have so much to offer."

— Ruth Salzman, CEO, The Russell Berrie Foundation, on the Human Capital Initiative

PROFESSION FOR LIFE:
INTEGRATION OF HIGH-POTENTIAL IDF SOLDIERS

While the Israel Defense Forces (IDF) has played a huge role in catalyzing Israel's innovative and entrepreneurial success, many talented soldiers who could potentially pursue high-tech careers do not receive the tools to do so during their service. In partnership with the Friends of the Israel Defense Forces (FIDF), SNC has identified the possibility of creating a new gateway from the IDF into the tech industry by identifying and providing career-advancement skills to eligible candidates who may otherwise not be channeled towards the industry.

SNC and the IDF's ATAL Technology and Logistics Directorate, which releases thousands of soldiers annually, have devised a program to provide select soldiers with the credentials to pursue an academic degree relevant to high-tech, or immediately enter the tech workforce upon release. The first cohort graduated in November 2018 and additional cohorts are on the horizon.

VOCATIONAL INTERVENTION FOR HAREDI SEMINARY STUDENTS

Over 7,500 young women are enrolled in two-year Haredi vocational seminaries each year and this number is expected to double within the next decade. Approximately 10% opt to study computer science, constituting 90% of Haredi women who study this field. In a decade there will be more Haredi computer science students in seminaries than secular women pursuing similar degrees in all Israeli universities combined.

The current seminary computer science program is out-of-date and does not correspond to the hiring needs of tech companies. The instructors are not adequately experienced to prepare their students for today's workforce. Illustrating this, a significant percentage of July 2018 computer science graduates from the leading seminaries have yet to find jobs in high-tech. Those who are employed in the tech sector generally fill low-level, low-paying positions with little possibility for advancement.

Every year of mismatch between the level of student preparation and the needs of the industry leads to a loss of hundreds of potential high-quality candidates for the industry and, concurrently, the loss of hundreds of high-paying jobs for these

women. SNC has prioritized intervention for this population due to the growing number of high-quality seminary graduates and the willingness of rabbinical authorities to explore substantial programmatic changes.

In an unprecedented move, leading Haredi Rabbinic Council members asked SNC to redesign the two-year seminary computer science curriculum with industry partners Google, Mobileye, and Western Digital. The confidence of Haredi leadership stems from their recognition of SNC's deep connections with the industry and understanding of its needs.

While only 90 out of the 300 women studying computer science in the pilot seminaries were accepted into SNC's program, the entire seminary computer science curriculum is being upgraded as seminary educators undergo training to improve their teaching methods and knowledge.

CYBERGIRLZ CLUB: PRE-MILITARY INTERVENTION

The Cybergirlz Club prepares grade 10 and 11 girls with an aptitude for technology to pass the IDF elite intelligence cyber unit entry exams taken in grades 11 and 12. No technical background is required to participate; the curriculum aims to cultivate students' interest in technology and to hone relevant skill sets.

The program launched in Modi'in in September 2018. As the program gained exposure, demand has increased to expand both in Modi'in and beyond.

POLICY

There is no single government authority in Israel tasked with maintaining Israel's technological advantage. This responsibility is spread out among many agencies: the Innovation Authority, the Ministry of Finance, the Council on Higher Education, the Tax Authority, the Ministry of Defense, the Ministry of Health, the Ministry of Agriculture, the Ministry of Labor, the National Economic Council, and even the Census Bureau. Although these bodies are often productive, they are not coordinated. They tend to focus on the short term and can be slow to respond to change. SNC collaborates as a thought leader and sounding board with many of these agencies on strategic issues and specific program design, aimed at ensuring that Israel's innovation ecosystem has a conducive environment for growth. SNC's combination of objectivity and professionalism has enabled it to win the trust of government agencies and to collaborate effectively with them.

Many in Israel subscribe to two misconceptions--that Israel is very special in its ability to generate technological innovation and that the country is not well positioned to build large companies. The immediate conclusion from these is that Israel should specialize in creating ideas and selling them quickly—a conclusion that jeopardizes the very future of the Start-up Nation. In the face of rapidly growing competition from innovation hubs around the world; aggressive foreign government policies; a local shortage of human capital, financial investment in innovation, and limited research funding; SNC and its partners are working to help the government create a focused strategy to ensure Israeli technological leadership for the coming decades.

2018 HIGHLIGHTS

SNC was instrumental in preventing cryptocurrency from being classified as an asset. This classification would have ended the use of cryptocurrencies and jeopardized the entire Israel blockchain industry.

SNC's CEO was invited by the Director General of the Ministry of Finance (MOF) to present MOF leadership—the Budget, Tax, and Accountant General departments—with the organization's views on the future of the tech sector in Israel; and to propose a government strategy to increase its sustainability.

SNC worked with the Innovation Authority and the Ministry of Agriculture to qualify the AgriTech sector for pilot funding. As a result, twelve Israeli crop-protection and smart-farming companies were chosen by the government to conduct pilots abroad.

SNC was instrumental in helping to formulate the Tech Workers Visa reform. A seamless online process now enables high-tech companies to request expedited visas for "expert" foreign workers from abroad.

SNC played a key role in preventing the Volcani Institute, the largest Israeli agricultural institution producing the majority of agricultural research in Israel, from being moved from central Israel to the north of the country. The move would have potentially hindered the level of agricultural research produced in Israel by reducing the Institute's proximity to and ties with major research institutions such as the Hebrew University, Weizmann Institute of Science, Bar Ilan University, and Tel Aviv University,

SNC acted to prevent the taxation of foreign venture capital investors which would have been detrimental to investments in the industry. In 2018, Israeli companies attracted $6B of venture capital, much of which was from foreign investors.

"Israel has two coexisting economies that require different human capital. The local and less productive economy (down economy) and the Zeppelin economy which accounts for a staggering 50% of Israel's GDP. Furthermore, the salaries differ significantly, and this gap contributes to inequality. The aim is to assist these two economies in growing independently but at the same time maintaining one society. To do this we, we must change the distribution of jobs in the Israeli market, and promote the influx of certain sectors."

— Prof. Eugene Kandel, at the Zuckerman STEM Leadership Symposium at the Technion

COMMUNICATIONS

SNC's Communications team works to raise the visibility of SNC's work among relevant stakeholders in the local and international high-tech community and the public at large. The cross-platform strategy encompasses print, web, and radio outlets, and is critical to SNC's positioning as a primary resource for information and insights on the Israeli innovation ecosystem.

INTERNATIONAL MEDIA

In 2018, the Communications team widened its reach to two new, important countries for SNC—Japan and Germany. By developing relationships with the top newspapers in each country, the team secured exposure for SNC activities and further strengthened business ties between them and Israel's high-tech community.
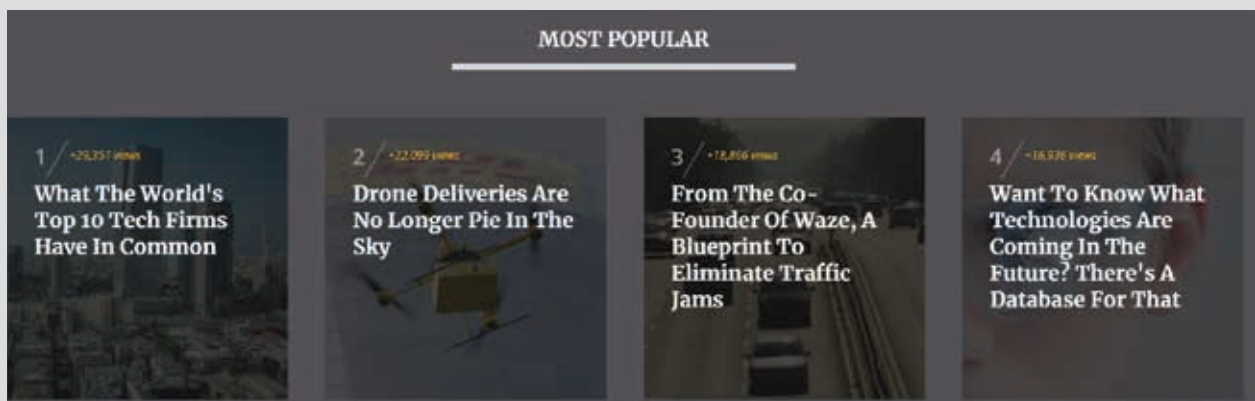
NIKKEI ASIAN REVIEW

Süddeutsche Zeitung

SNC-FORBES CHANNEL

Innovative ideas from the Israeli tech ecosystem, from the people who make it happen

Born out of a relationship with the Forbes 30 Under 30 conference, which brings promising innovators from around the world to Israel every year, the SNC-Forbes Channel launched in early 2018. Through this widely read platform, SNC curates content from a network of top-tier high-tech professionals contributors: CEOs, investors, heads of product and research, and other industry insiders that offer a refreshing, relevant voice in an otherwise journalist—and blogger—dominated field.

MOST POPULAR

1. What The World's Top 10 Tech Firms Have In Common
2. Drone Deliveries Are No Longer Pie In The Sky
3. From The Co-Founder Of Waze, A Blueprint To Eliminate Traffic Jams
4. Want To Know What Technologies Are Coming In The Future? There's A Database For That

DATA NATION IN THE MARKER

Data Nation is SNC's ongoing data-storytelling partnership published in The Marker, Israel's most influential tech news platform. SNC publishes monthly articles based on trends emerging from Finder data, including the major 2018 hit, "Multinationals Open More than 20 R&D Centers a Year in Israel".

MEDIA PLACEMENTS OF NOTE
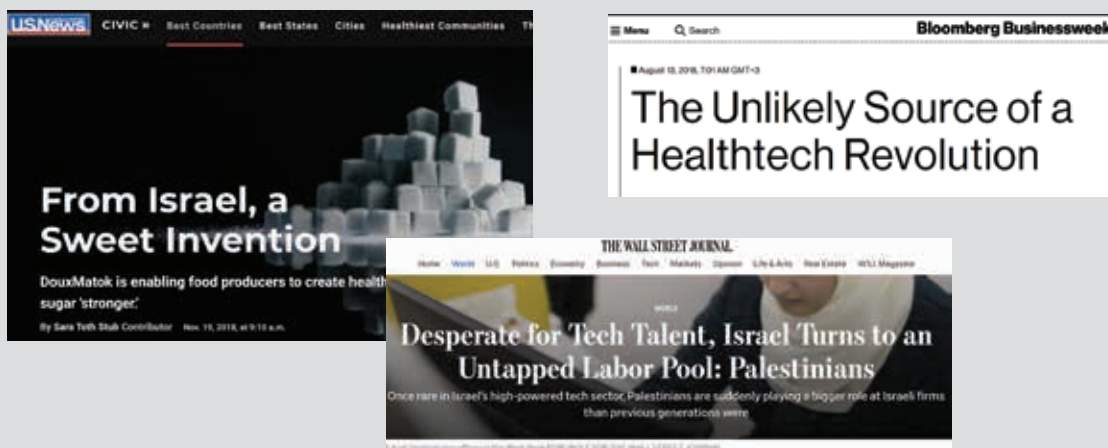
GO-TO-GUY PODCAST

The main economics-tech program on Radio Tel Aviv featured a weekly segment for 10 weeks called "Go-to-Guy," (in Hebrew), featuring Guy Hilton, SNC's General Manager. Guy's broadcasts are based on Finder data and insights and aim to increase the local ecosystem's knowledge of and reliance on SNC, for example, unveiling data from SNC's H1 2018 Ecosystem Report. A portion of the segment—in which Guy discusses the growing layer of maturing Israeli tech companies—was also broadcast on the station's main newscast.

Guy's first broadcast was about Israel's rapidly developing SportsTech sector. Interest in Israeli SportsTech was piqued by the SNC report presenting a composite of Israeli sports technologies produced and distributed for journalists covering the Giro D'Italia race. Guy offered statistics about Israeli technology at the World Cup and about where this burgeoning and broad sector, which has almost doubled over the past three years, is headed. Seed funds invested in SportsTech have also doubled during this time, signifying that this sector is attracting more interest.

Photo shoot for TheMarker Tech Nation article (Hebrew) "The Spreadsheet Gets Updated Several Times a Day: The Project that Maps 6,000 Start-Ups in Israel", June 2018

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