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Leadership Team



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Start-Up Nation Central



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Start-Up Nation Central



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Prof. Eugene Kandel
Co-Chairman
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Uri Gabai
CEO
Start-Up Nation Central
Research & Policy Institute



Jeremie Kletzkine
VP Business Development
Start-Up Nation Central



Eliran ElimelechVP Strategic Partnerships
Start-Up Nation Central



Dana Pollak WassermanSenior Director, Human Resources
Start-Up Nation Central



Maty Zwaig
CEO
Scale-Up Velocity

From the Desk of Avi Hasson

Chief Executive Officer



I am pleased to present the *Start-Up Nation Central* 2020 Annual Report. Given my recent appointment to head the organization, I took the opportunity to learn from the team the major elements of last year's activity. As I prepare to take the reins officially in September, it is my honor to share with our partners what I have learned about *Start-Up Nation Central's* wins and impact in 2020, along with the latest highlights of 2021.

I view this period as **a uniquely historic one**, not just for the State of Israel but for the world of technology and innovation, as the pandemic, even if tentatively, begins to recede from crisis mode. To that end, I offer you a peek into the next phase of *Start-Up Nation Central* and its mission to expose the world to the continuously evolving technology innovation coming out of Israel.

Start-Up Nation Central was founded to help realize the potential of Israel's innovation and its impact on the world. Witnessing how Israel's innovation sector responded to the COVID-19 pandemic has been remarkable. It managed to survive the widespread restrictions on

travel and assembly and even achieved record-breaking investments by harnessing the Israeli entrepreneurial spirit, with all its creativity, agility, and resourcefulness.

Like our partners in the industry, *Start-Up Nation Central* was able to quickly adjust to **the realities of COVID-19**, transitioning to remote work without missing a beat. We released a special "CoronaTech" start-up landscape map providing detailed information on Israeli companies helping to combat the virus. This was one of the first resources available to governments and others from abroad. Subsequently, *Start-Up Nation Central's* series of digital engagements, virtual summits, and webinars helped ensure that Israel's tech sector remained firmly on track, fueled by increased global interest and investments even as the world was sealed shut.

The year 2020 also hailed the historic Abraham Accords that established official ties between Israel and four of its regional neighbors. The region is poised to become a global powerhouse of innovative solutions for global challenges, including in the fields of digital health, fintech, food security, water abundance, and renewable energy. Start-Up Nation Central is a strong believer in Innovation Diplomacy — employing innovation to connect and build long-term relations between people and countries. To that end, we are already working closely with key corporations, investors and government leaders in the region to advance the relationships. We were honored to host the first UAE Ambassador to Israel, His Excellency Mohamed Al Khaja, to discuss mutual partnerships in tech innovation. Start-Up Nation Central also signed a series of strategic cooperation agreements with leading Emirati stakeholders

Start-Up Nation Central's ongoing mission is to ensure Israel's continued capacity for innovation, while fostering the culture that enables it. During 2020, we advanced the mission on several fronts. By constantly improving our flagship Start-Up Nation Finder Innovation Business Platform—use of which increased by 45% this year—we provided the world with easily accessible and up-to-date insights and data about Israel's tech ecosystem. We plan on augmenting those capabilities even further going forward by integrating new technologies and classifications onto the platform. Through the publication of a series of special industry reports, our expert research team showcased the

breadth and depth of the country's key innovation sectors. This provided a wealth of information for prospective investors and multinationals seeking collaboration.

Our business units took a hands-on approach to connecting start-ups with corporate, government, and financial sector decision-makers, organizing more than 100 **physical and digital engagements**. We also expanded our reach in social media and brought innovation success stories to hundreds of local and international media reports.

Key to enabling all of our activities, especially in a locked down world, was **the construction and launch of our new broadcast studio**. Featuring advanced recording and broadcasting capabilities and a television-quality control room, "The Hub" proved indispensable for building bridges when in-person contact was impossible. This facility set a new standard for remote conferencing that will remain long after the pandemic is over.

In addition to our core activity, we recognize the importance of government policies that enable innovation. **The launch of a new** *Start-Up Nation Central* **Policy and Research Institute** will tackle challenges around the growth of the innovation economy. In an effort to help Israel overcome its chronic human capital shortage, we have designed and implemented several models to increase the supply of skilled workers, which also aim to reduce socioeconomic gaps by introducing previously underrepresented populations into the workforce.

We also welcomed another addition to the *Start-Up Nation Central* Family: **Asif – Israel's Culinary Institute**. Housed in our Tel Aviv headquarters, Asif celebrates Israeli innovation passion through culinary culture and tradition. We believe that 2021 presents a key moment for Israel as the world adapts to a different COVID-19 reality, hopefully a receding one, and **toward the new digital age.**

Looking back on 2020 and forward to 2021, I already see the passion and hard work of *Start-Up Nation Central's* talented team, together with the trust and support of the organization's **dedicated donors**, who recognize the value in bolstering Israel's standing in the world as a leader in innovation. I recognize the years of impactful leadership that Professor Eugene Kandel brought to *Start-Up Nation Central*, and feel privileged to take the baton and continue its work.

Avi Hasson

Chief Executive Officer

2020 - Israeli High-Tech's Breakout Year

Israeli Innovation Ecosystem



\$10.7b

Total Investments (\$16b so far in 2021)



786

Funding Rounds



31

IPOs (57 so far in 2021)



104 M&As



16

Unicorns
(24 new in the first half of 2021)



534

New Startups

Start-Up Nation Central



5,000

Participants in online and on-site events



+45%

Start-Up Nation Finder User Increase



23

Proof of Concepts (PoCs)



8

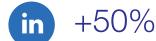
Commercial Agreements



957

Media Appearances







+10%

Social Media



Hailed the "startup nation," Israelis have honed the art of problem solving, turning our small country into a **universally acclaimed innovation powerhouse**. For Israel to remain at the forefront of the technology frontier for the next decade and beyond, it needs to continuously grow, expand, evolve and adapt, to ensure the long-term health and success of its main growth engine, the industry must constantly push limits, seize new opportunities, build bridges into foreign markets, and offer disruptive solutions across sectors.

Inspired by the bestselling book, "Start-Up Nation: The Story of Israel's Economic Miracle," by Dan Senor and Saul Singer, *Start-Up Nation Central* was founded in 2013 by business and philanthropic leaders who recognized the need for an independent, nonprofit organization committed to exposing the innovation ecosystem and to ensuring its long-term success.



Solving world challenges through Israeli technological innovation.



Amplifying Israel's position as the leading nation in tech innovation, helping realize Israel's value as a global solution hub, and supporting its continuous growth.



As experts in Israeli innovation with our fingers on the industry's pulse,

Start-Up Nation Central's

multidisciplinary team proactively identifies gaps and opportunities, delivering targeted initiatives that propel the industry forward.

Our flagship activities and special projects strengthen and embolden the Israeli high-tech sector.





Israeli Innovation Battles COVID-19

With the onset of COVID-19 in early 2020, our team pivoted, finding new ways to support and showcase Israeli tech companies, as part of a nationwide effort to join the battle against the coronavirus and to mitigate its impact.

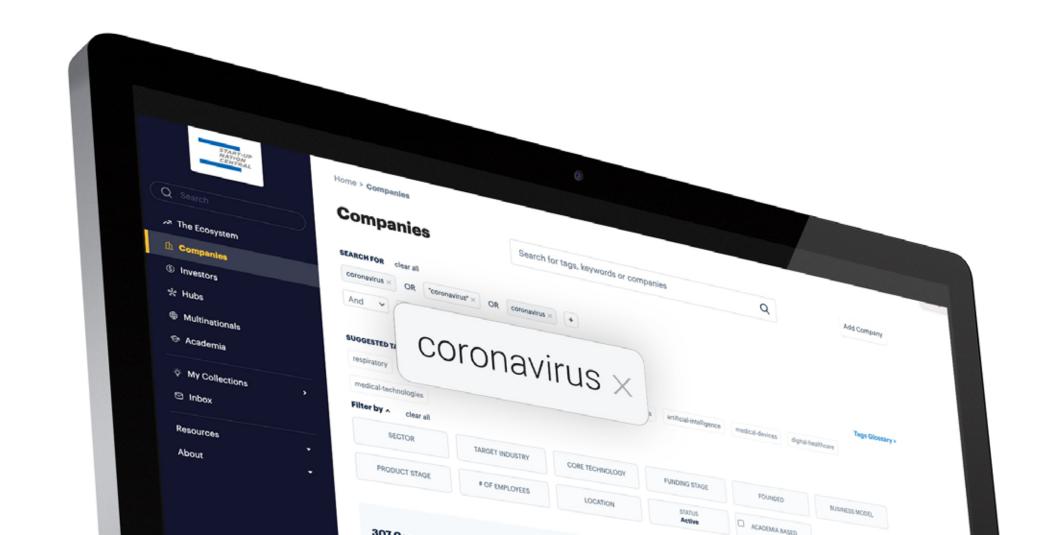
Mapping the Israeli CoronaTech Landscape

With hundreds of Israeli companies developing groundbreaking solutions to a myriad of pandemic-related challenges, *Start-Up Nation Central* quickly recognized the need to provide global investors, governments, corporations, and healthcare providers with a comprehensive and accessible way to find and engage with them. By adding a "coronavirus" tag and "quarantine" tag to the *Start-Up Nation Finder Innovation Business Platform*, we were able to create an easily searchable database to facilitate introductions between Israeli CoronaTech startups and companies seeking solutions.

Israeli Companies Tackling COVID-19

Using the insights from *Start-Up Nation Finder*, we published a series of informative resources including:

- An interactive visual landscape featuring scores of Israeli companies that specialize in healthtech solutions, broken down into subsectors, from remote monitoring to diagnostics and medical decision support.
- Concise guidebooks for corporations, healthcare providers, and governments, listing companies with relevant pandemic solutions.
- An interactive digital report examining how Israel's tech innovation ecosystem can help shape the post-COVID-19 era.





COVID-19 Startup Competition with Genesis Prize Foundation

Start-Up Nation Central, in partnership with the Genesis Prize Foundation and 2020 Genesis Prize laureate, Natan Sharansky, launched a contest to identify the most promising innovations developed by Israeli companies fighting COVID-19. Mr. Sharansky allocated a portion of his one million dollar prize to ten winning companies. The solutions ranged from communications for ventilated patients in ICUs to plasma-derived protein therapeutics, AI-based health assistance, cuttingedge masks, and a floating video-call device that enables caregivers to remotely visit and monitor elderly patients. Each winning company donated its prize to an Israeli NGO working to mitigate the effects of COVID-19 among vulnerable populations. Remarkably, additional funds contributed by the companies, NGOs, and other foundations brought the total philanthropic contribution to \$500,000.

Start-Up Nation Central helped each of the ten winning companies to create a three-minute pitch video to promote their solution and generate press exposure.

The 10 Winners











Biobeat

A wearable vital sign monitor

Eyecontrol

A wearable assistive communication device

Israel Aerospace Industries

In Vitro Diagnostics (IVD) platform

Kamada

Plasma-derived protein therapeutics K Health

Al personal health assistant

Play |

Play 🗾

Play |



Play |





Picodya Technologies

In Vitro Diagnostics (IVD) platform

Pluristem

Pluristem Therapeutics

Placental cell therapy

Sight Diagnostics

Advanced blood diagnostics platform



Sonovia

Sono-coating applications

Zeppi

Dynamic video calling for seniors and caregivers









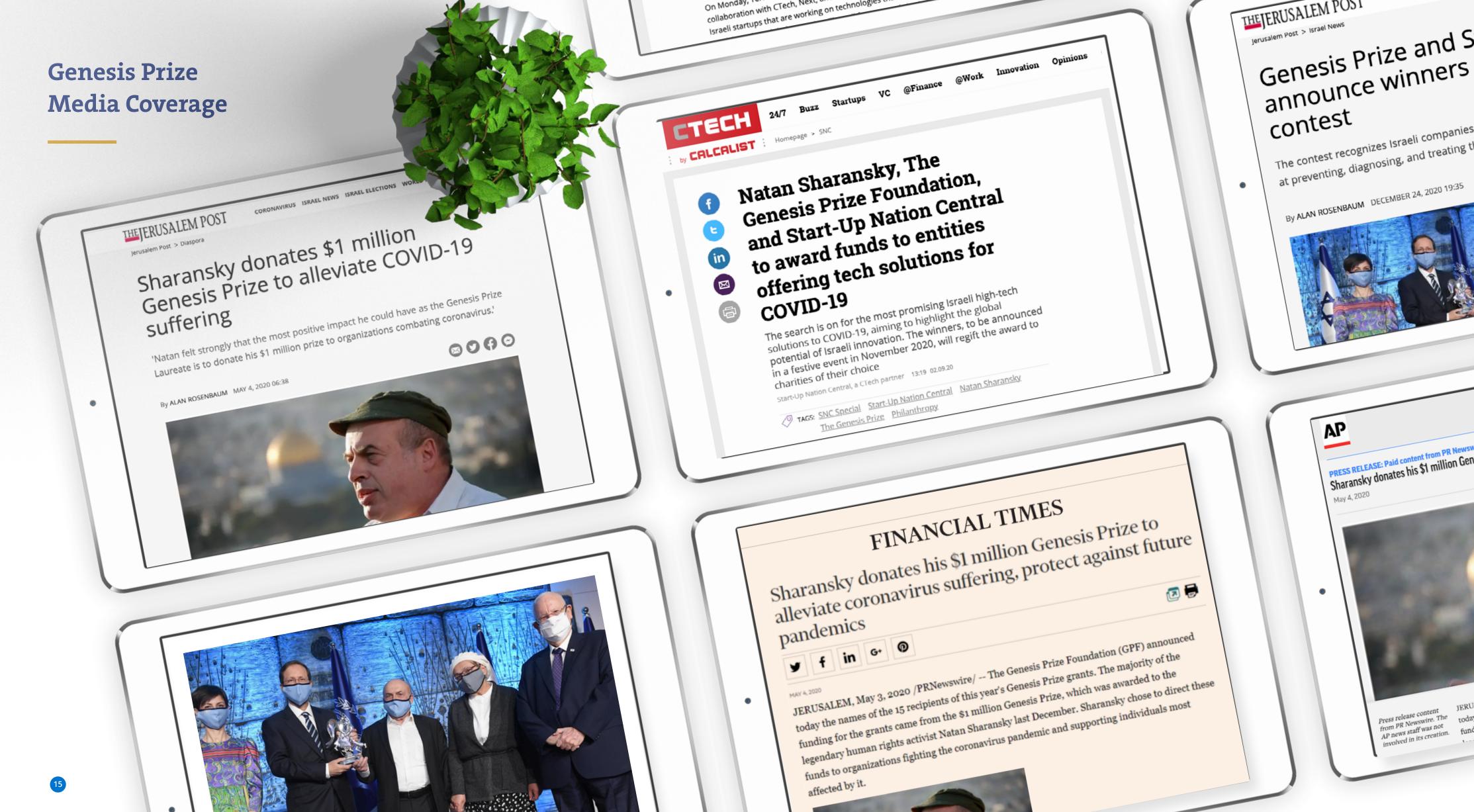














The 2020 Tour de France

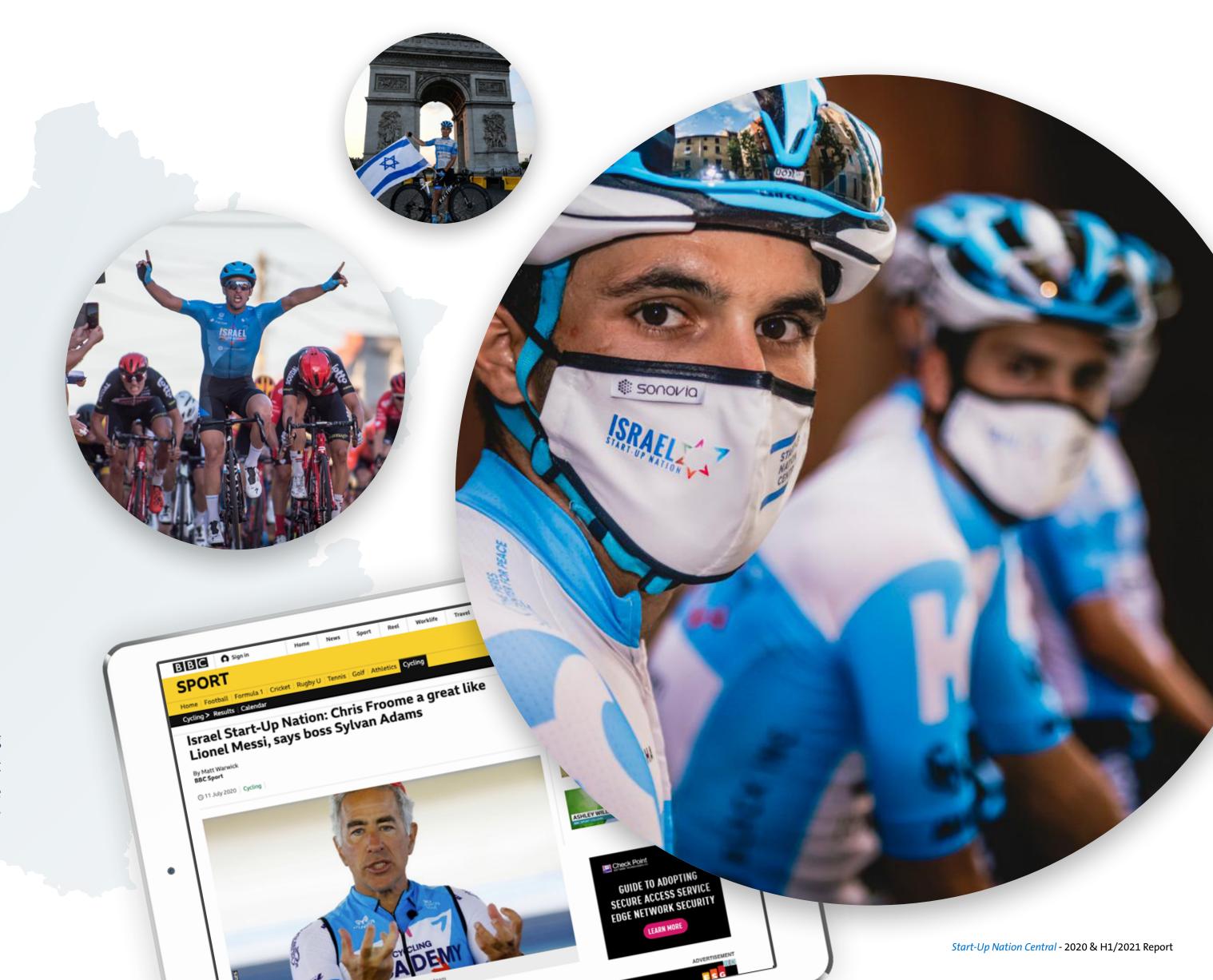
The legendary cycling race was held under strict COVID-19 restrictions and the riders on **Team Israel Startup Nation** were ahead of the pack, wearing advanced face masks produced by the Israeli company Sonovia. The SonoMasks are made from a special **anti-pathogen fabric that is reusable, washable, and provides two-sided protection**. The masks provided to the riders bore the *Start-Up Nation Central* logo, showcasing both sports and Israeli innovation.



By partnering with *Start-Up Nation Central*, we are showcasing the Israeli tech ecosystem on a global stage. I have no doubt that cutting-edge Israeli technology will give our team a competitive advantage as we race against the very best in world cycling."

Sylvan Adams

Team co-owner and Start-Up Nation Central partner

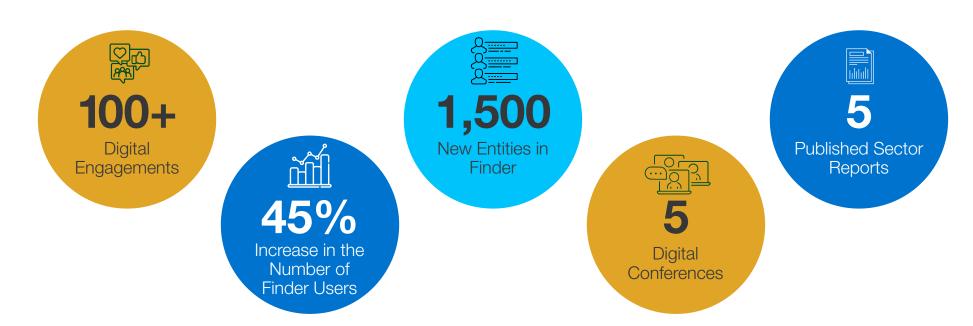




Beyond the Pandemic

The New Digital Age

How will post-COVID-19 impact our lives in the long term? What impact will the Abraham Accords have on the region? How will we address changes to education, healthcare, travel, finance, and commerce in the 21st Century? What does the future of work look like? Which industries will be left behind, and which will flourish? *Start-Up Nation Central* tackled all of these questions in a series of virtual events and published reports.



The Abraham ACCORDS (5

The Abraham Accords

The New Frontier

The signing of **the Abraham Accords** in August 2020 marked an exciting new chapter for the region.

Start-Up Nation Central is a natural partner to connect the GCC countries with Israel through innovation, helping generate opportunities for investment and collaboration.

The UAE-Israel Business Leaders Summit 2020

In December 2020, **Gulf News** - the number one daily of the UAE, and **The Marker** - one of Israel's top financial publications, cohosted this virtual conference attended by more than 1,800 investors, entrepreneurs, government officials, and journalists. The event, co-sponsored by *Start-Up Nation Central*, aimed to advance and accelerate dialogue between the two countries and lay the groundwork for collaboration across business sectors. **Prof. Eugene Kandel**, co-Chair of *Start-Up Nation Central Research & Policy Institute*, presented **a keynote address** in which he shared his insights on the main trends and opportunities afforded by the historic agreements. *Start-Up Nation Central* board member **Dan Senor** delivered an address on

the status of Israeli startups, and Uri Gabai, CEO of Start-Up Nation

Central Research and Policy Institute participated in a panel discussing
the joint opportunities presented by normalized relations.

Start-Up Nation Central officially launched the UAE-IL Tech Zone at the event. The UAE-IL Tech Zone – the first UAE-Israel innovation community, is an exclusive platform aimed at bridging technological, entrepreneurial, business, venture capital (VCs), and government collaborations between the UAE and Israel. The growing community, already connecting more than 2,000 business, innovation, and technology leaders from both countries, aims to create a stronger

region through mutually beneficial entrepreneurial and technological ecosystems. The tech-zone is gradually evolving to become a GCC regional community.

In December 2020, in *Start-Up Nation Central's* **Industry 4.0 Global Leaders Summit**, **Prof. Eugene Kandel** spoke with **H.E. Omar Sultan Al Olama**, Minister of State for Artificial Intelligence of the UAE to discuss his country's unique vision and strategy around a multitude of AI applications.



Joint Task Force to Advance Collaboration Focused on Innovation and Entrepreneurship

Ambassador to Israel, H.E. Ambassador Mohamed al Khaja, to launch a joint task force aimed at bringing the people of Israel and the UAE together to share ideas and generate economic value. The task force will conduct ongoing meetings and programs to help both sides learn about each other's tech ecosystems, particularly in the fields of FinTech, AgriFood-Tech, EduTech, Cyber, Digital Health, and CleanTech.





We are here to identify what sectors can prosper in the field of technological innovation and bridge together key partnerships that will thrive in the world market with contagious success.

His Excellency, the UAE Ambassador to Israel, Mohamed al Khaja



Start-Up Nation Central is an objective gateway to the Israeli innovation tech ecosystem, and we are excited to play a major role in taking advantage of the historic opportunity presented by the Abraham Accords to connect UAE and Israel around tech innovation.

Prof. Eugene Kandel, co-Chairman,

Start-Up Nation Central, Policy and Research Institute



The Abraham Accords



Amplifying the Voice of Israeli Innovation

Providing a voice for the Israeli innovation ecosystem and amplifying success stories to strategic audiences around the globe.

During the year, Start-Up Nation Central launched its **state-of-the-art hybrid broadcast studio** to create high impact business engagements, events, conferences, and seminars.

The new studio proved useful when restrictions on travel and public gatherings were put in place due to the COVID-19 pandemic. The studio's capabilities enabled us to continue to hold events and business engagements even while under lockdown.

Our hybrid broadcast studio in action

Since the launch of **our broadcast studio** in August, *Start-Up Nation Central* has hosted a series of virtual gatherings, including three multiple-day global mega-events focusing on AgriFood-Tech, Industry 4.0, and the New Digital Age.

The studio features two stages, a series of robotic cameras, and a television-grade control room. It was designed to enable the shooting, recording, and streaming of live events that align with *Start-Up Nation Central's* core mission.

The *Start-Up Nation Central* Hub is a room for an audience of 80 people, making it perfectly suited for holding in-person meetups, enabling us to host the full gamut of physical, hybrid, and fully virtual events.

In 2021, "The Hub" will be further augmented by **a brand new podcast studio**, which will enhance our storytelling abilities even further.









Events

With the onset of the pandemic, *Start-Up Nation Central* transitioned its 2020 activities online. We hosted nearly 100 digital engagements, as well as several virtual summits, online events, and webinars, connecting thousands of startups with business leaders and governments from around the world.

Israel Industry 4.0 Week

In February 2020, a few short weeks before the world went into lockdown, *Start-Up Nation Central*, in partnership with **Deloitte** and **Grove Ventures**, held its annual three-day **I4 Industrial Innovation Tech Conference** focused on enhancing the productivity of traditional manufacturing by using advanced technology. Thirty Israeli I4 startups exhibited their innovations in the fields of predictive maintenance, cybersecurity, autonomous mobility, "factory of the future," laser sensors, remote monitoring, among other disciplines **that boost production efficiency**. Among the many high profile participants who attended the event were Billy B. Bardin, Global Operations Technology Director of **Dow Chemicals**; Tomomi Kosaka, President of **Honda Engineering**; Barthold Veenendaal, Senior VP Startup Partner, Innovation at **Schneider Electric**; Giovanni Bechini, Head of Engineering Platforms and Analytics **Siemens**; and Marcelo Ribeiro, Global VP Supply Chain, **AB InBev**.



Industry 4.0 Global Leaders Summit

In December 2020, *Start-Up Nation Central* and **Grove Ventures** co-hosted a virtual event, providing a forum for more than 3,000 attendees to connect, exchange ideas, expand their networks, and discover hundreds of innovative Israeli 4.0 technologies.

The virtual summit facilitated more than 300 pre-scheduled B2B meetings. Among our speakers were Neil Ackerman, Global Supply Chain Digital Executive at **Johnson & Johnson**; Giovanni Bechini, Head of Industrial Applications at **Siemens Energy**; Amit Harel, colead, **Deloitte Catalyst**; Tali Segall, VP Innovation at **Siemens Digital Industries Software**; and Farid Sevilla, Head of Global Supply Chain Innovation at **Procter & Gamble**.

One of the highlights of the event was a one-on-one discussion between Prof. Eugene Kandel and H.E. Omar Sultan Al Olama, Minister of State for Artificial Intelligence of the UAE. The two discussed the potential for **long-term collaboration** between Israel and the UAE, particularly in the field of logistics, and ways in which the two regional powerhouses can leverage each other's strengths to gain global prominence.



66

The UAE is a hub for the Middle East, Africa, India and Asia, the way that Israel is a hub for European and American investments. Working together makes the markets much bigger; it makes investments more appealing and also allows us to create systems and companies in these two countries that can compete with the big giants, and even become giants of their own."

His Excellency, Omar Sultan Al Olama, Minister of State of Artificial Intelligence of the UAE

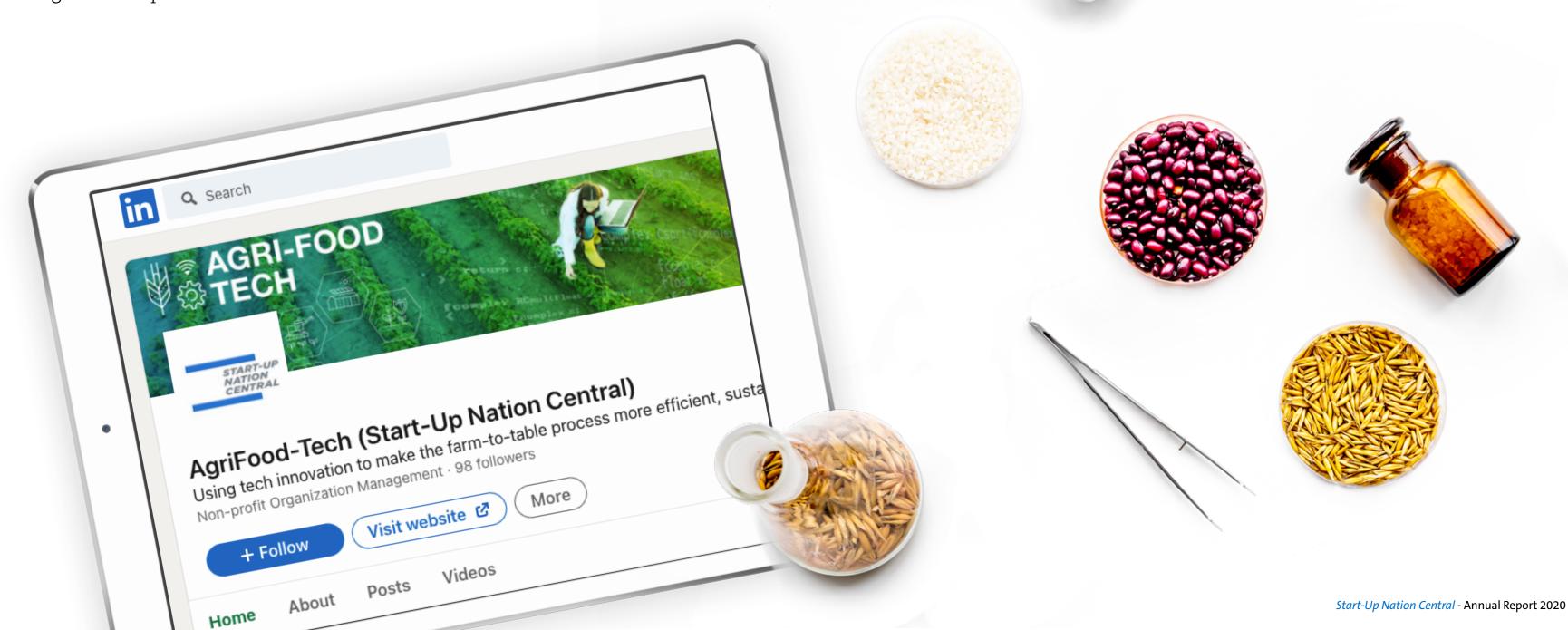
The New Digital Age Conference

In September 2020, Start-Up Nation Central hosted an interactive, three-day virtual conference attended by over 1,400 participants from 50 countries. Speakers included Prof. Lawrence H. Summers, Charles W. Eliot University Professor and President Emeritus at Harvard University; Prof. Edward Glaeser, Fred and Eleanor Glimp Professor of Economics in the Faculty of Arts and Sciences, Harvard University; Dr. Michal Rosen-Zvi, Director of Health Informatics at IBM Research; Dr. Peter Singer, Special Advisor to the Director-General, World Health Organization; Ash Jokhoo, Chief Information and Data Officer at Virgin Atlantic; and Dan Senor, Investor and co-author of the bestselling book Start-Up Nation. The event was broadcast from Start-Up Nation Central's studio live on LinkedIn and Facebook, generating more than 100 B2B meetings for 40 participating Israeli startups.



The Annual AgriFood Global **Investors Summit**

In November 2020, Start-Up Nation Central and GrowingIL hosted a three-day virtual live streamed summit, featuring presentations and panel discussions with industry leaders in Agri-Tech, Food-Tech, Animal-Tech, Smart Farming, and Alternative Foods. The event included pitches and demos by leading AgriFood-Tech entrepreneurs, and an expo featuring hundreds of startups looking to raise capital. Dozens of global investors and partners looking for collaboration opportunities took part in the event. Among the high-profile speakers who attended the event were Matilda Ho, Founder and Managing Director, Bits x Bites; Greg Meyers, CIO and CDO of Syngenta; Ellen de Brabander, Senior Vice President R&D **PepsiCo**; and Jordi Llach, Head of Food EMENA at **Nestle**.



Start-Up Nation Central -Jerusalem

Start-Up Nation Central's Jerusalem operation uses the capital city as a testbed for strategic projects that can strengthen the tech ecosystem. By tapping into a demographically diverse and complex city, Start-Up Nation Central aims to show the way for other cities to leverage complexity to scale their tech sector.

COVID-19 limitations notwithstanding, Start-Up Nation Central was able to amplify Jerusalem's tech successes both nationally and globally. In honor of Jerusalem Day 2020, Start-Up Nation Central used data collected from the Finder Innovation Business Platform, and partnered with the Jerusalem Development Authority, the Ministry for Jerusalem, and the Jerusalem Institute for Policy Research to release updated data on the city's tech sector. The findings received widespread press coverage including in The Times of Israel, the Jerusalem Post, and Ynet.

The Jerusalem Tech Forum is a Start-Up Nation Central-led group of the city's most senior tech leaders, who gather semi-annually to develop a strategy for the tech ecosystem. This group meets informally to hash out the challenges and opportunities facing a growing tech sector.



Meanwhile, Start-Up Nation Central's flagship project in the city, 'Jerusalem: Where Tech Meets Design' is a series of events that strengthen the city's tech ecosystem by branding Jerusalem as having unique assets to highlight the strategic role of design in technology, and which has has enjoyed international coverage.

Tech Meets Design succeeded in producing five events during 2020. Pre-COVID, a live event, **Design for Access**, put a spotlight on the role of design in technologies for the disabled. Three successive webinars titled **Staying Sane in a Remote World** focused on the pandemic's impact on the role of design in critical sectors: the Future of Work, the Future of Health, and the Future of the Digital Age. A follow-on webinar unpacked the myriad technologies in the wellness space, with a focus on their design.





By SHOSHANNA SOLOMON V

19 May 2020, 4:32 pm |





Business Opportunities

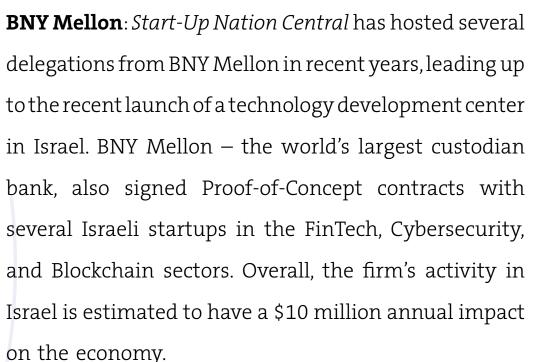
In 2020, *Start-Up Nation Central* hosted around 100 **customized business engagements**, most of them virtual sessions connecting Israeli solutions to companies and governments worldwide. We fostered deep connections within the Israeli ecosystem and with global corporations, strategic investors, international consulting firms, government agencies, and academics.

Digital Engagements for Business Connections

Virtual Learning Expedition



A Selection of Business Engagements





SeeTree: Start-Up Nation Central introduced SeeTree — an Israeli startup specializing in crop and tree management systems — to the International Finance Corporation (IFC), which is the private sector arm of the World Bank Group. In 2020, SeeTree raised \$30 million, led by IFC—one of the largest investment rounds in history for an Israeli AgriTech company. The investment has allowed SeeTree to scale globally, with companies around the world using its technology to optimize crop yields.



Novartis Institutes for BioMedical Research (NIBR): The drug discovery unit of Swiss pharmaceutical giant Novartis selected Israel as one of four countries capable of assisting them with identifying novel solutions. Out of the 81 submissions they received, 35 were from Israeli companies recommended by Start-Up Nation Central. NIBR decided to pursue discussions with a total of eight companies, six of them Israeli. In April, three of these companies showcased their technology at Start-Up Nation Central's broadcast studio. Arne Mueller, AD & Senior Expert III Data Scientist at Novartis said the experience was "informative, inspiring and smooth."



Mediclinic: Following discussions with *Start-Up Nation Central*, Mediclinic (an international private healthcare services group located in the UAE) has decided to partner with innovative Israeli companies to offer novel solutions to its patients via a new research center opening in Dubai.

START-UP NATION FINDER Your Innovation Business Platform

and engaging with Israeli tech innovation companies based on customers' specific interests. The platform provides comprehensive and up-to-date information on nearly 10,000 Israeli startups, investors, acceleration hubs, multinational corporations, and technology-based innovation associated with academic research.

Throughout 2020, *Start-Up Nation Central's* flagship *Finder Innovation Business Platform* saw an increase in adoption and usage including a

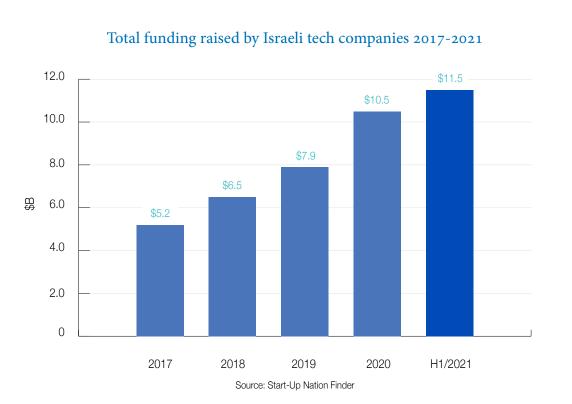
45% growth in the number of new users. Among many new additions,

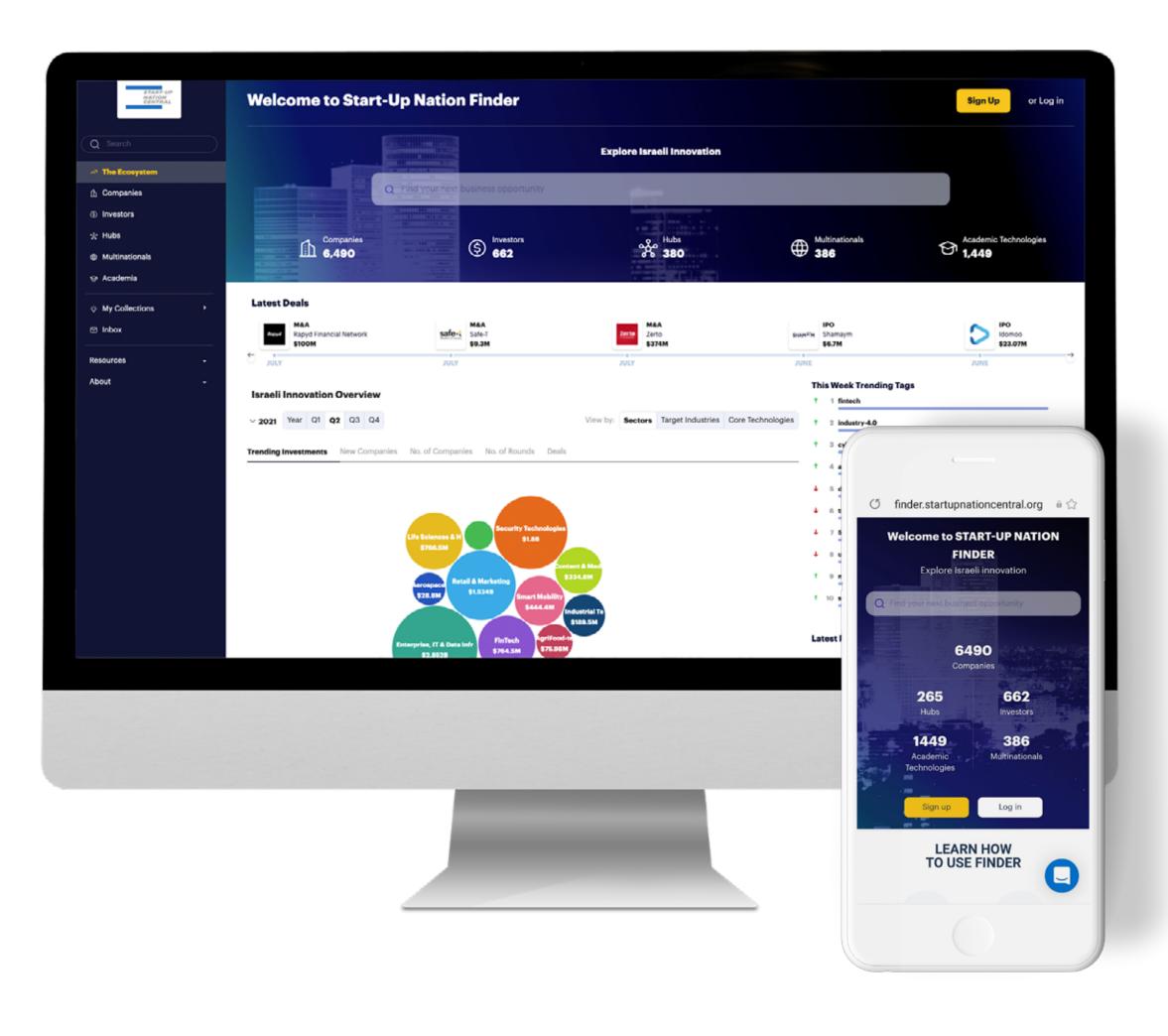
a more personalized user experience was created, which resulted in an increase of about 3,000 users a month who have self-identified on the platform, improving our ability to adjust relevant and meaningful content to increase engagement. Other advancements include the installment of a new AI-based search engine, a new easy-to-use chat interface, and an improved dashboard design.





Start-Up Nation Finder data provided the foundation for all of Start-Up Nation Central's sector and quarterly reports (see pages 28-33). It is a primary source for information about the Israeli innovation sector for government agencies, academic researchers, journalists, commercial entities, and policy institutes. This has resulted in thousands of mentions and citations of Start-Up Nation Finder in publications all over the world. Start-Up Nation Finder is also a primary source for global media on Israeli innovation trends, including the recent announcements of the Israeli innovation ecosystem reaching new heights in investment despite the pandemic — climbing from \$10.5 billion in 2020 to \$15 billion so far this year (July 2021). Similarly, it is the natural source and gateway for international investors and multinational corporations looking for innovative solutions to their business and tech challenges.







Research Reports

Based on insights gathered from *Start-Up Nation Finder* and a wide range of other authoritative global and local sources, the *Start-Up Nation Central* research and analysts teams produce annual **in-depth studies** on the companies and organizations that make up Israel's innovation ecosystem. Insights are published and disseminated globally via sector and trend reports, visual landscapes, and interactive maps. Our reports and their insights receive widespread attention from the industry and media, increasing our reach tenfold.



BARRON'S

Bloomberg

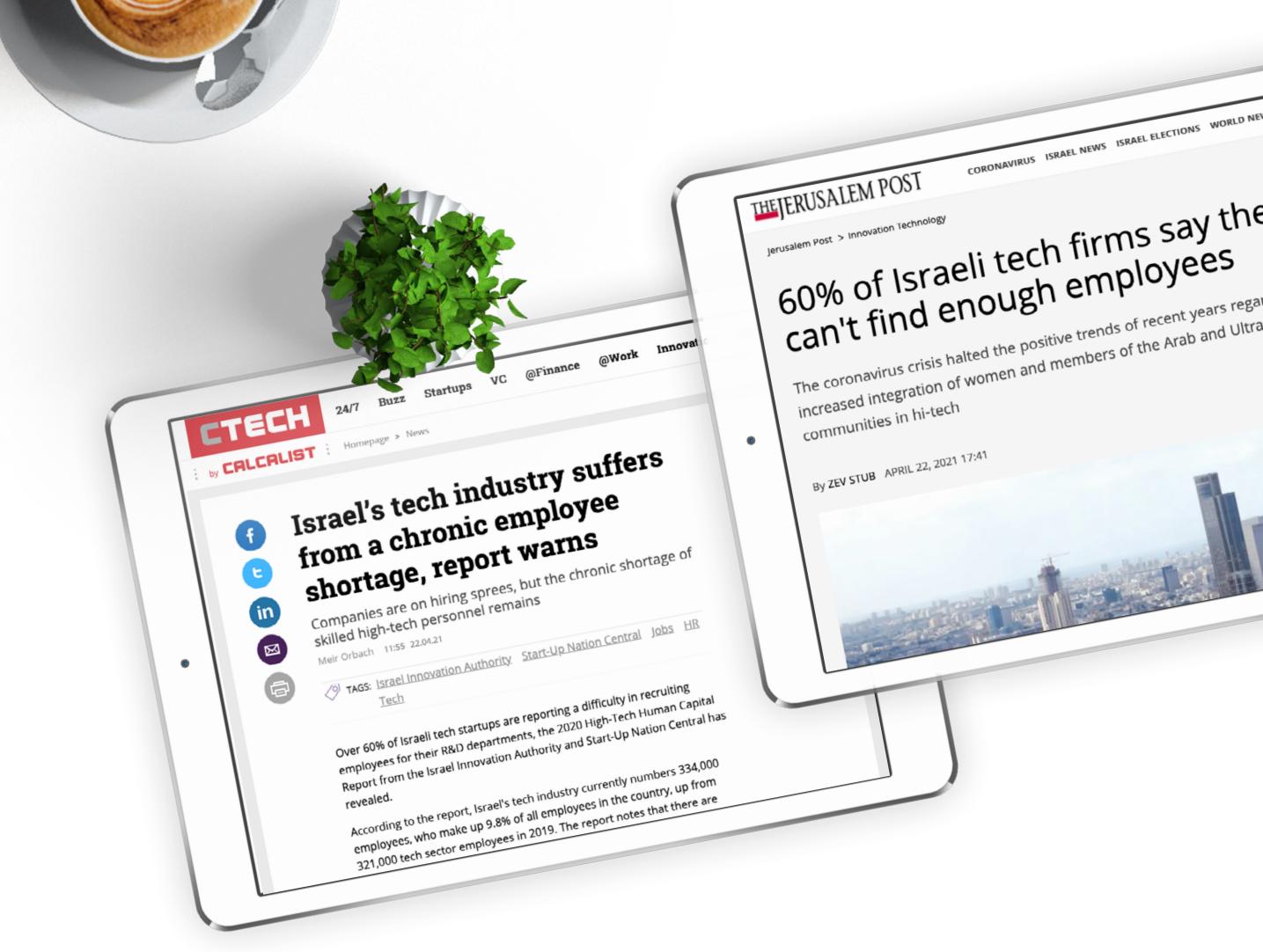
JEWISHINSIDER

Forbes

High-Tech Human Capital Report



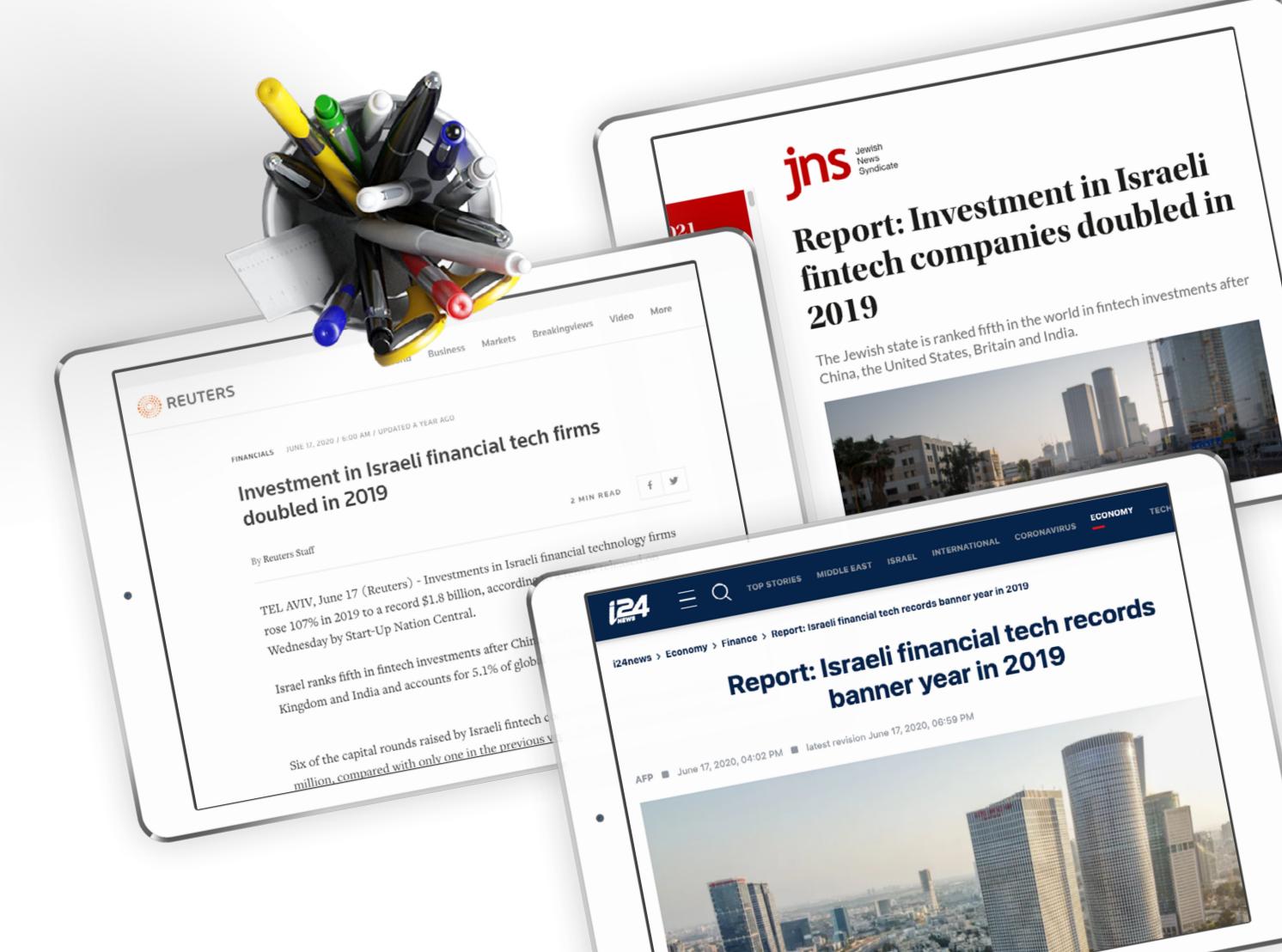
Published in February 2020, in partnership with the Israel Innovation Authority, the 2019 & 2020 reports provide a comprehensive overview of the state of human capital in the Israeli high-tech sector. The report presents key trends such as the overall increase in the number of high-tech employees, the shortage of workers skilled in specific areas, recruitment challenges for inexperienced workers and underrepresented populations, the impact of multinational companies on the local high-tech workforce, and more. The Human Capital Report drew media attention gaining 34 articles in 25 different media outlets. The High-Tech Human Capital Report 2020, published in May 2021, is available here.



FinTech Report



Published in June 2020, *Start-Up Nation Central's* first fully digital, interactive research report presents the latest industry trends and a detailed analysis of the local FinTech ecosystem, and effects of COVID-19 on this sector moving forward. The report generated 26 global media items, including in Reuters and Barron's. **Review the Report.**

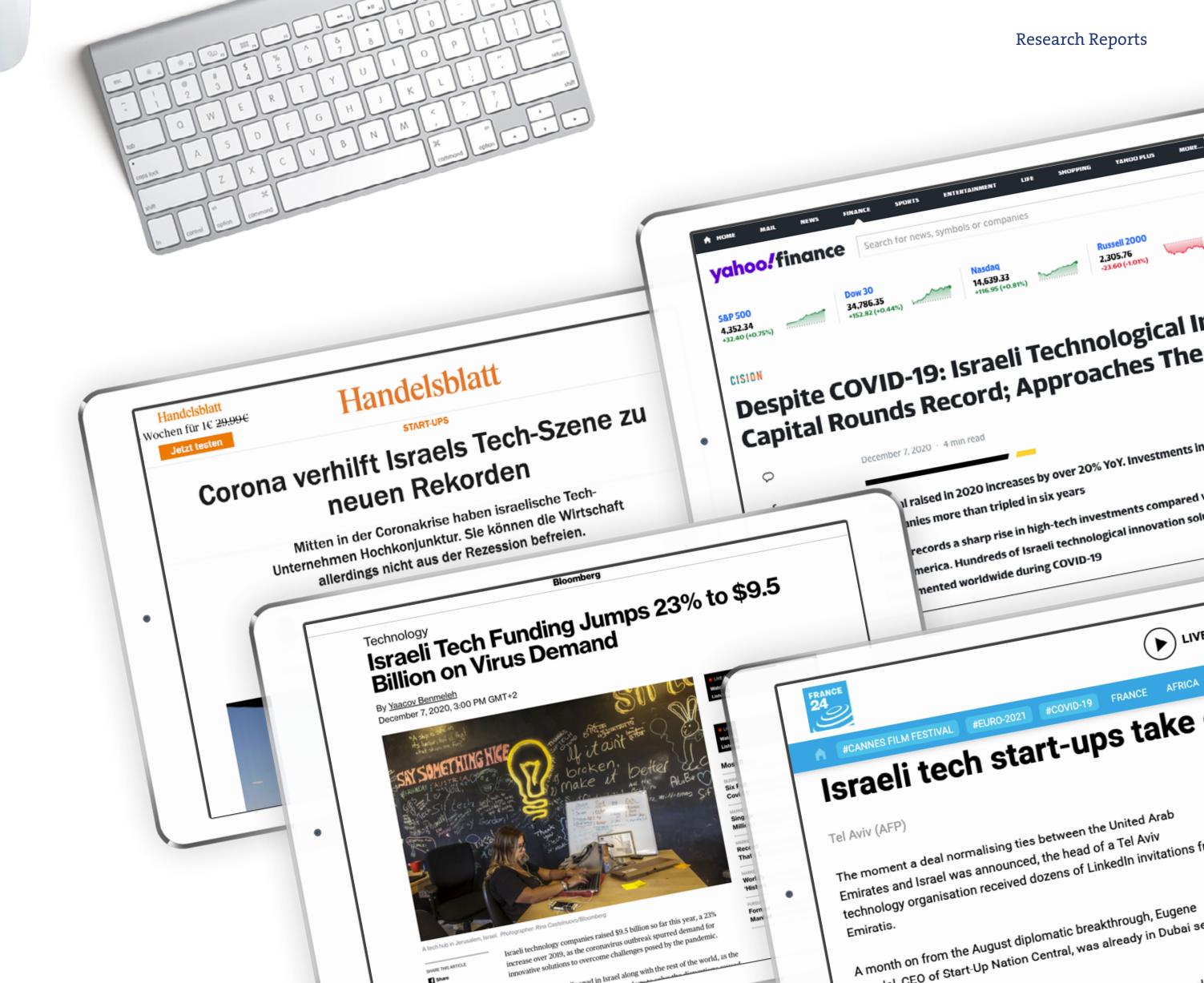


The New Digital Age Report



Published in September 2020, this interactive report provides insight into many of the questions related to the role of technology in the pandemic and post-pandemic era. The report suggests how Israel's tech ecosystem can help shape the post-COVID era, identifying companies in relevant sectors such as Cybersecurity, Digital Healthcare, FinTech, Industry 4.0, Smart Mobility, AgriFood-Tech, TravelTech, and EdTech. The report also delves into impact investing and sustainable development in the coronavirus era and touches on the pandemic's impact on human capital and financial capital.

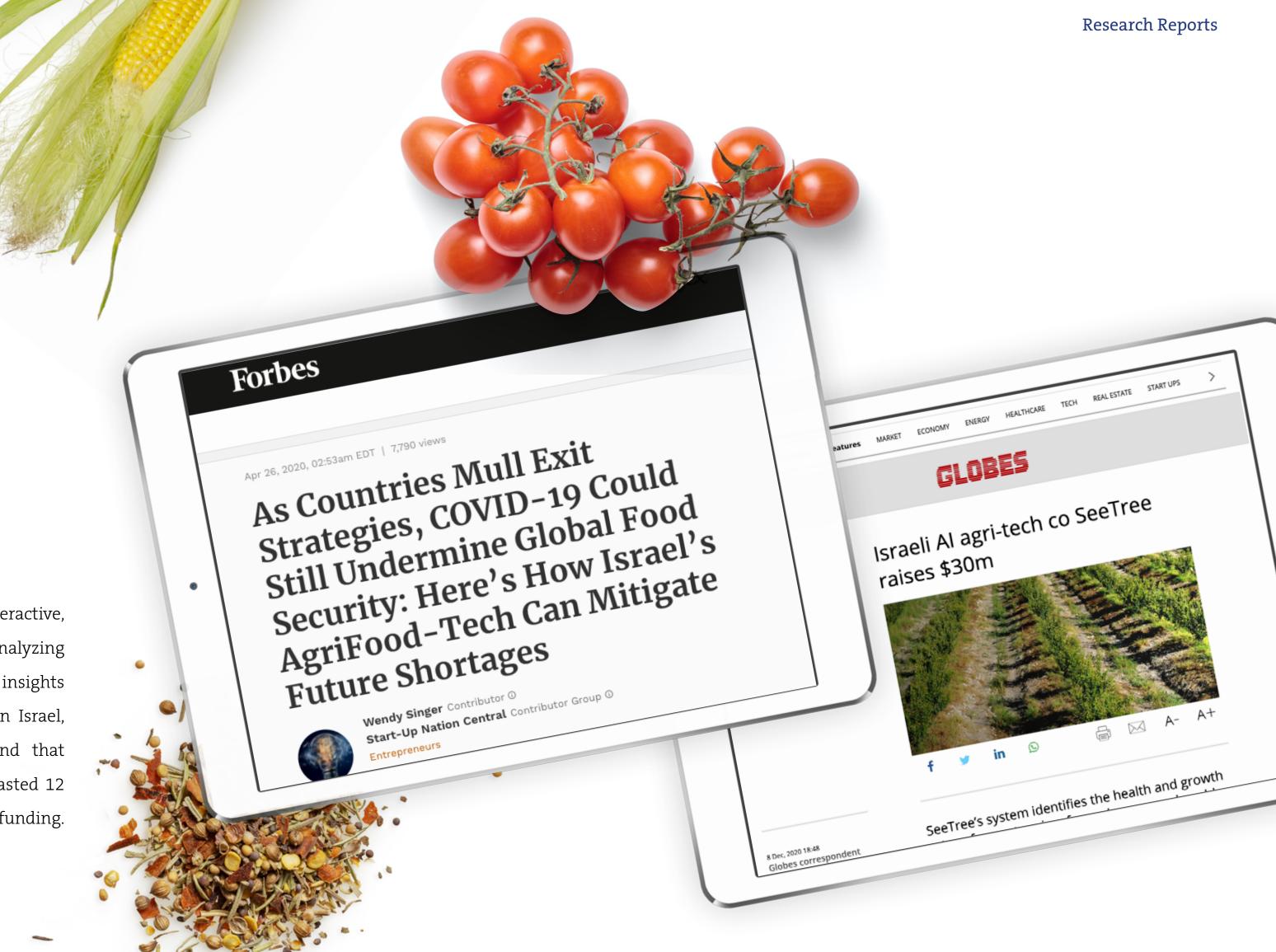
Download the Report.



AgriFood-Tech Trends

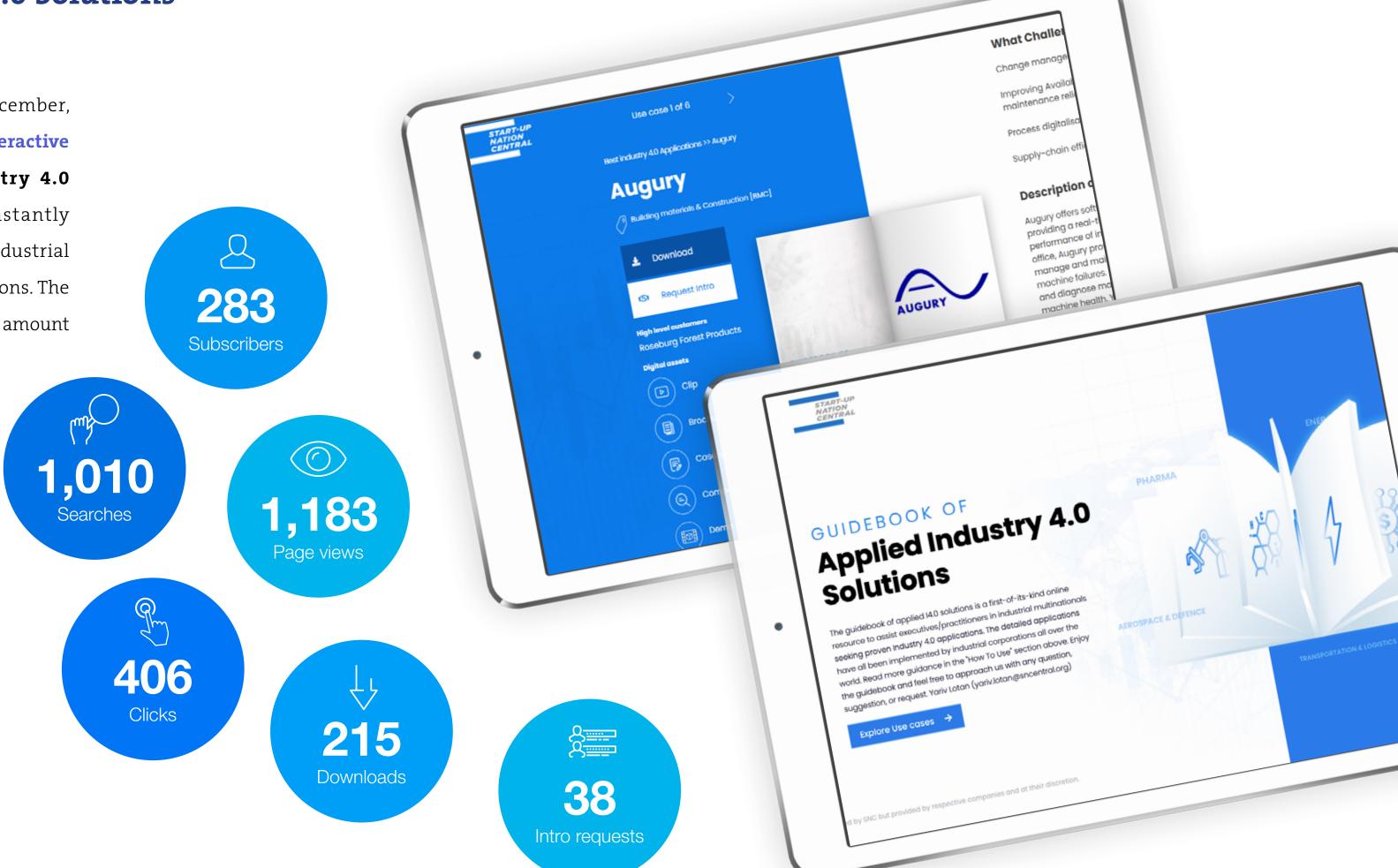


In November 2020, *Start-Up Nation Central* produced an interactive, digital overview of the AgriFood-Tech sector, profiling and analyzing more than 400 active innovation companies and providing insights on recent investments, multinational companies operating in Israel, and key commercial partnerships abroad. The study found that COVID-19 did not hinder the sector's development, which boasted 12 seed rounds and 14 sizable follow-ons, exceeding total 2019 funding. **Download the Report.**



Guidebook of Applied Industry 4.0 Solutions

First introduced at the Global Leaders' Summit in December, Start-Up Nation Central produced a first-of-its-kind interactive guidebook featuring the most promising Industry 4.0 applications. The online guidebook provides a constantly updated resource for executives and practitioners in industrial multinationals in search of proven Industry 4.0 applications. The initial version of the report listed 250 applications, but that amount has since doubled.





Building Innovation Bridges

Start-Up Nation Central's Innovation Bridges includes two strategic business operations. The first seeks to leverage the Israeli innovation ecosystem to meet the growing global demand for sustainability solutions. The second aims to disperse the Israel Innovation Model, exporting Israeli technological innovation expertise to global markets in an effort to strengthen diplomatic and business ties.

Impact-Tech Initiative

Start-Up Nation Central's Impact-Tech initiative leverages Israeli innovation to meet the growing global demand for **sustainability solutions**. We cultivate global partnerships that create business, social and environmental value on the ground.

Ecosystem Elevation

We elevate the Impact-Tech ecosystem by mapping all elements of the ever-changing landscape, developing models and tools that support growth, generating deep insights, and highlighting unique innovations. In 2020, we created the "SDG" tag in *Start-Up Nation Finder*, phase one of a more comprehensive categorization of Impact-Tech in *Finder*.

Partnerships with Purpose

We cultivate partnerships with global players including corporations, investors, accelerators, and leading NGOs to address sustainability challenges as well as implement and scale Israeli solutions on the ground. Among the organizations we partnered with were **the World Health Organization**, **Parley for the Oceans**, and **World Bank Group** member - **the International Finance Corporation (IFC)**, which marked its first-ever investment in an Israeli company - **SeeTree**.

The Sustainable Development Goals (SDGs) are a collection of 17 interlinked global goals designed by the UN to be a "blueprint to achieve a better and more sustainable future for all".

The SDGs were set up in 2015 by the UN General Assembly and are intended to be achieved by the year 2030.











































Tackling Global Poverty and Food Insecurity

Israel is a world leader in modern agriculture and the recipient of 7% of global funding for Agri-Tech solutions that are changing the way food is grown, harvested, packed, stored, transported, processed, and sold. Hybrid seeds, bio-pesticides, smart irrigation solutions, farm machinery, and in-soil and in-tree sensors are just a few ways Israeli companies are making the farm-to-table process more efficient, sustainable, and safe. *Start-Up Nation Central* has launched projects in Africa and India to connect small-scale farmers and producers with Israeli Smart Farming solutions. Our activity in this field is primarily the result of successful cooperation with the **Syngenta Foundation for Sustainable Agriculture**.

Two noteworthy projects that were carried out in 2020 included a collaboration with Israeli Agri-Tech company **Groundwork BioAg** on implementing mychorizza technology to increase crop yields and reduce the need for water and fertilizer on farms in India, and the signing of a **MOU between Israel's Tal-Ya Agricultural Solutions and the India-based civil society organization Solidaridad Network** to implement Tal-Ya's durable tray system, which protects seedlings, decreases the need for irrigation, fertilizer, weeding, and pesticide and significantly increases yields.



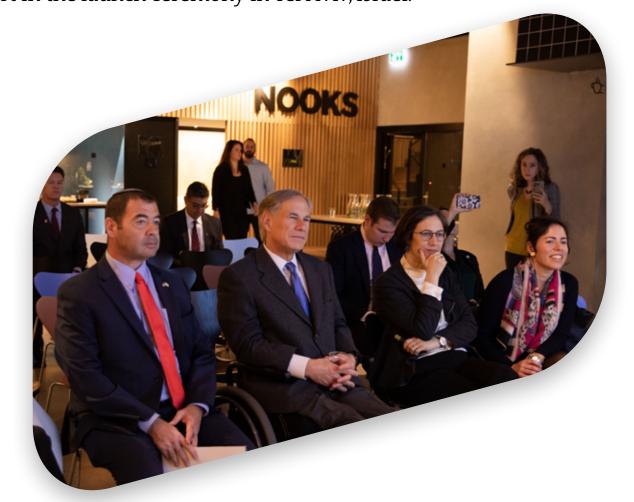
Platform (EIP) India. In partnership with the Syngenta Foundation for Sustainable Agriculture and the Milken Innovation Center, Start-Up Nation Central developed an innovative framework to accelerate the commercialization of high-impact technologies in India. The EIP addresses barriers of scale by identifying, testing, adapting, and distributing relevant Israeli technology to millions of farmers.

Global Finder Network

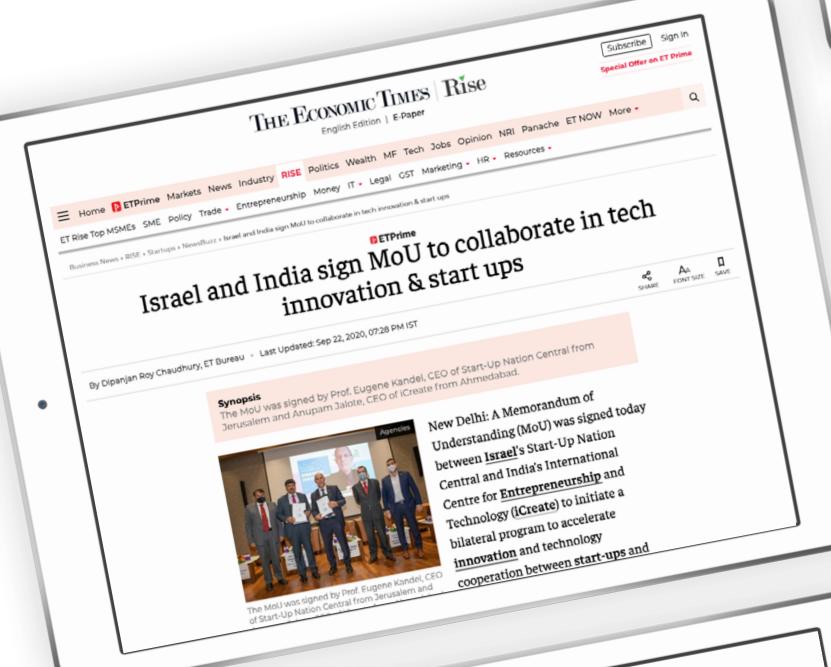
The Global Finder Network is based on the Start-Up Nation Finder Innovation Business Platform, which offers global players direct and meaningful engagement with the Israeli innovation ecosystem and offers valuable insights into current performances, challenges, and trends.

There are currently **five** *Global Finder Network* **partner countries/ states** -- New Zealand, Thailand, Michigan, Texas and Taiwan.

The last two - Texas and Taiwan - joined in 2020. **Texas Governor Greg Abbott** took part in the launch ceremony in Tel Aviv, Israel.







Start-Up Nation does it again,

this time Taiwan joins Global

Finders

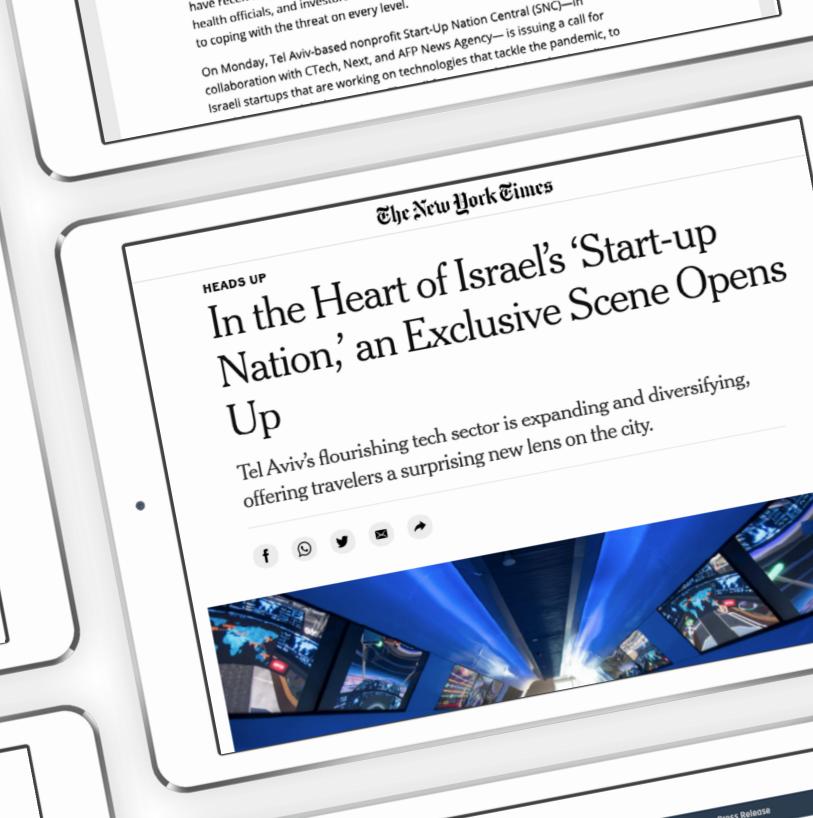
after Israel's...

Dor Schwartz / 10 Jul 2020 · 2 Min Read

As proven by the success of the Start-Up Nation Central, which connects outside

As proven by the success of the Start-Up Mation Central, which connects outside stakeholders to Israeli innovation, now it's Taiwan's turn to model its tech ecosystem

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to coping with the threat on every level.

The New York Times





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Building Tech Communities

Our Community Development team works to build networks of entrepreneurs, enhancing their capacity to enter the international arena by increasing their connectivity to each other and the wider ecosystem. 2020 included a series of online and offline events that brought together people from various industries, sectors, and geographies.

Community Events

Space Week

In an event co-hosted with **the Ramon Foundation**, *Start-Up Nation Central* held a morning of networking with SpaceTech startups and investors new to the sector. Legendary former NASA astronaut and former director of crew operations at SpaceX, **Garrett Reisman**, opened the event and spoke about the business opportunities that have grown in this sector over the last few years. The EU space agency spoke about acceleration programs and raising capital, while Mitsubishi Leasing outlined what they are looking for when it comes to extraterrestrial life.

Online Hackathon: Mini-Course for Community Managers

Start-Up Nation Central partnered with the European Institute for Innovation Technology (EIT) to design an EU-IL training for community leaders, teaching them how to run online events during the pandemic and beyond. From among more than 70 applicants, 13 Israeli participants were selected to join 13 leading European community leaders for this hands-on course.





CEO Forum: Understanding Government Grants for Startups

Held online, this annual event was co-hosted by *Start-Up Nation Central*, the **Israel Innovation Authority**, and **the Growth Forum**. The content was tailored for CFOs, providing them with practical and clear tools on how to apply for local and international grants.

The First EnergyTech Summit

Start-Up Nation Central supported **Ignite the Spark (ITS)** — an emerging EnergyTech community — in offering its first online summit. The conference brought together more than 170 participants from startups, corporates, and investors. **Izhar Shay**, Israel's then Minister of Science and Technology, spoke alongside Start-Up Nation Central Executive Director, **Wendy Singer**. The summit marked the beginning of a growing collaboration to improve the mapping of the EnergyTech sector on Start-Up Nation Finder.

Mastering Communities: 3-Day Virtual Conference

Start-Up Nation Central hosted a three-day virtual event with more than 70 speakers, 12 masterclasses, and 21 roundtables. Participants joined from 15 countries around the world.







Human Capital Initiatives

Integrating Underrepresented Populations into the Israeli High-Tech Workforce

Israel's innovation sector is the country's primary driver of economic growth. Yet, only 10% of the population participates in the high-tech workforce. The small and homogeneous nature of the industry, coupled with its higher-than-average salaries, perpetuates economic disparity in Israeli society. *Scale-Up Velocity, Start-Up Nation Central's* job training and placement arm, developed strategic interventions to fast-track underrepresented populations into positions in high-tech companies. In 2020, the pandemic forced us to deviate from our original implementation plan, including moving course content online. We ensured participants had home access to the internet, something these populations often lack. In the case of ultra-Orthodox women, approval to move the programs online was required and obtained from the Rabbinical authorities, in itself a historic move.



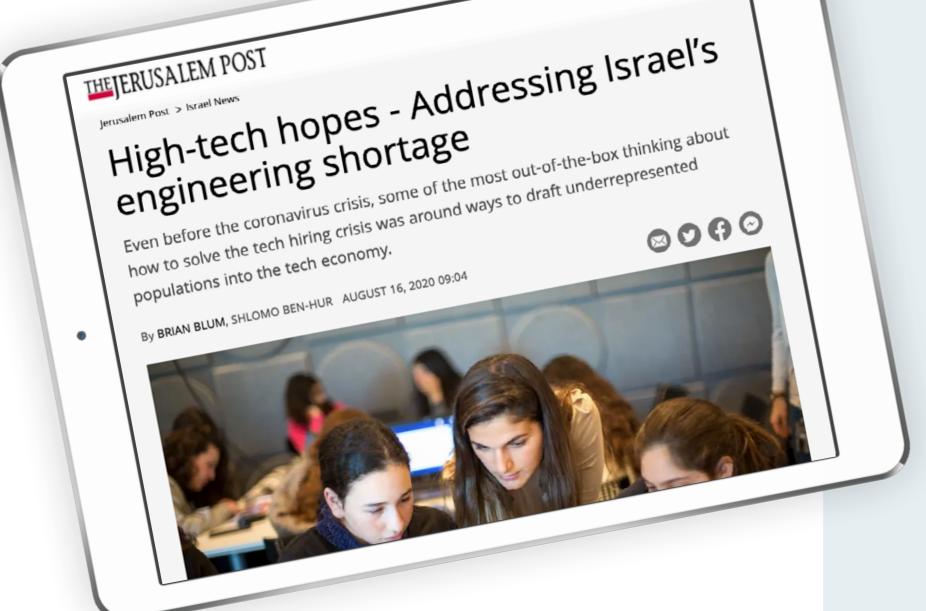
The four-month boot camp integrates Israeli Arab and female ultra-Orthodox computer science college graduates into the high-tech sector through a holistic cutting-edge curriculum designed in partnership with key industry leaders to offer advanced technical skills, hands-on experience, and assistance in interview preparations.

Transitioning Excellenteam to Jerusalem-Based Colleges

The success of the Excellenteam model resulted in a partnership with the Jerusalem Development Authority (JDA) to offer the boot camp as a post-graduation component for students at four Jerusalem-based colleges:

Machon Lev, Machon Tal, the Open University Degree
Program at Beit Bracha Seminary, and Azrieli College.
In addition to addressing the need for trained talent in the high-tech sector, the project will strengthen Jerusalem-based colleges' standing among employers and prospective students.

"After many failed interviews, the boot camp renewed my motivation and upgraded my capabilities, both in terms of motivation and upgraded my capabilities, both in terms of admission tests and job interviews. I got a much broader view admission tests and job interviews. I got a much broader view admission tests and job interviews. I got a much broader view of the high-tech industry, met knowledgeable and capable of the high-tech industry, met knowledgeable and capable of the high-tech industry, met provided me with tools."





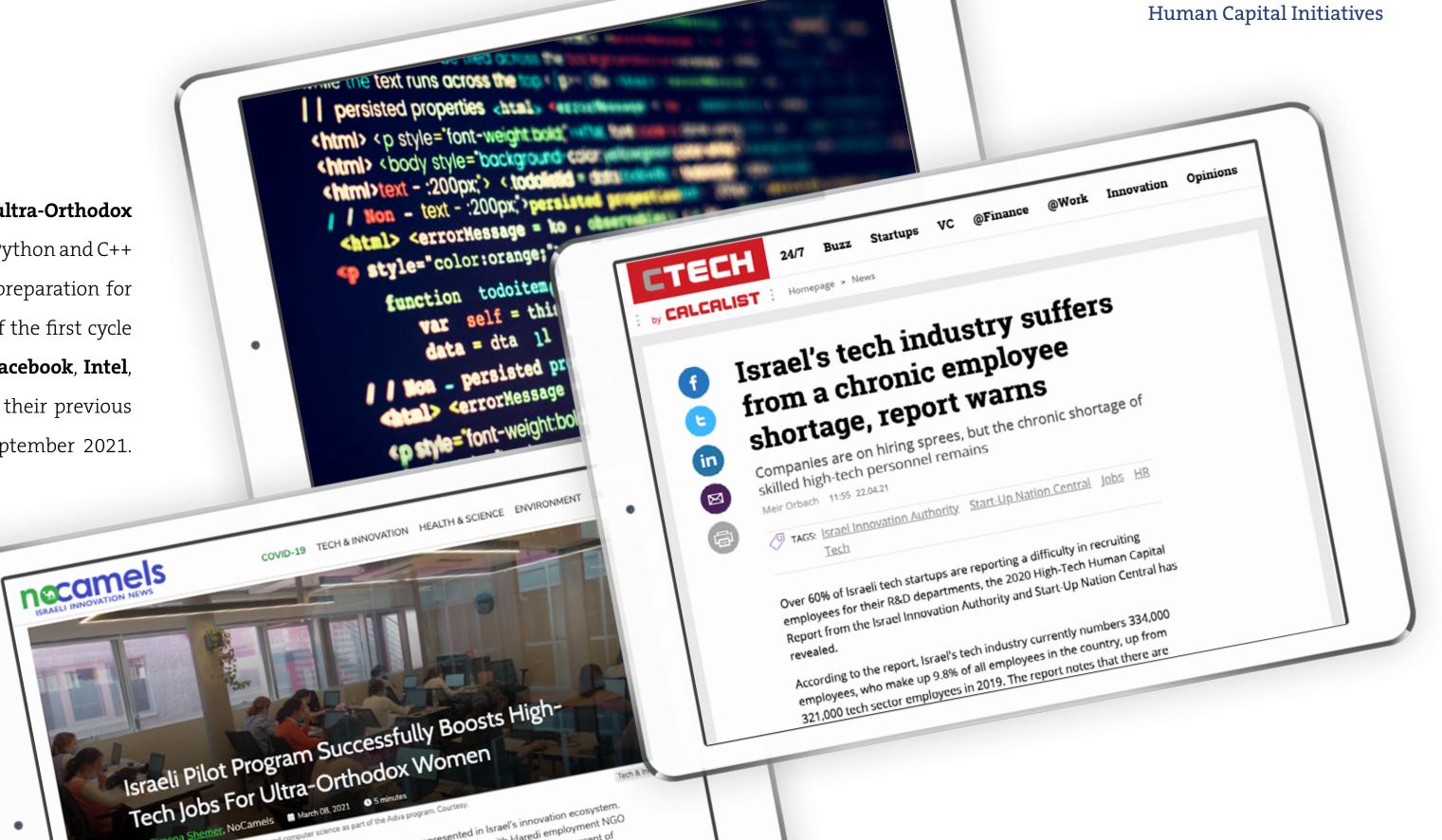
Asil Nasser (27) always loved computers, so he decided to study electrical engineering at the Technion-Israel Institute of Technology. After graduating, he went to 19 job interviews but wasn't hired by a single company. The Excellenteam program provided Asil with the skills and self-confidence necessary to succeed in an interview, and he was ultimately placed at Intel as a Product Development Engineer.



Hadas Sonnenfeld (41), from Jerusalem, is married with three children. She majored in physics and worked as a teacher for 12 years before deciding to start a new career at age 35. Hadas earned a BA in Computer Science from the Hebrew University of Jerusalem and is currently working on her MA. After completing the Excellenteam program, Hadas received multiple job offers, and ultimately accepted a position at Mobileye.



This two-year vocational computer science program **for female ultra-Orthodox** seminary students focuses on core mathematics skills, advanced Python and C++ training, as well as hands-on projects, ongoing mentoring, and preparation for the high-tech recruiting process. Over 90% of the 81 graduates of the first cycle have been placed in core programming departments at Apple, Facebook, Intel, and Deloitte, earning an average starting salary of three times their previous salary. The second cycle of 53 participants will graduate in September 2021.



The ultra-Orthodox community has long been severely underrepresented in Israel's innovation ecosystem.

A joint <u>survey</u> compiled by the Israel Advanced Technology Industries (IATI) with Haredi employment NGO

KamaTech last year, showed that in 2018, ultra-Orthodox workers made up only about three percent of A joint <u>survey</u> compiled by the Israel Advanced Technology Industries (IATI) with Haredi employment NG KamaTech last year, showed that in 2018, ultra-Orthodox workers made up only about three percent of Israel's entire tech workforce, though cignificant strides have been made in the cast six user.

According to the report, ultra-Orthodox Jews working in the country's tech sector had jumped 52 percent in the years 2014 to 2018, with woman leading the way. Of the 9 700 Haradi tech workers that made un According to the report, ultra-Orthodox Jews working in the country's tech sector had jumped 52 percent in the years 2014 to 2018, with women leading the way. Of the 9,700 Haredi tech workers that made up the industry 6 900 of them were women.

Kama tech last year, showed that in 2018, ultra-Orthodox workers made up only about three plant lech last year, showed that in 2018, ultra-Orthodox workers made up only about three plant lech last years.

the industry, 6,900 of them were women.



Cyber4S is a unique six-month program developed by *Scale-Up Velocity* in partnership with the **Israel National Cyber Directorate** and **the IDF Profession for Life Directorate**, in coordination with leading cyber companies. The program trains suitable veterans of IDF combat units for positions as Fullstack developers for the cyber sector. Six months after the program's first cycle was completed, **75% of its graduates** have already found jobs in the industry. **Cyber4S was awarded the prestigious IDF Chief of General Staff's Innovation Award**.

Liam Kelles first cycle graduate: "In addition to better study habits, we also gained high-quality knowledge and personal ties with other participants and instructors that may serve us well in the future. I believe that most of the participants, if not all of them, will manage to take advantage of the incredible opportunity to integrate into the industry."





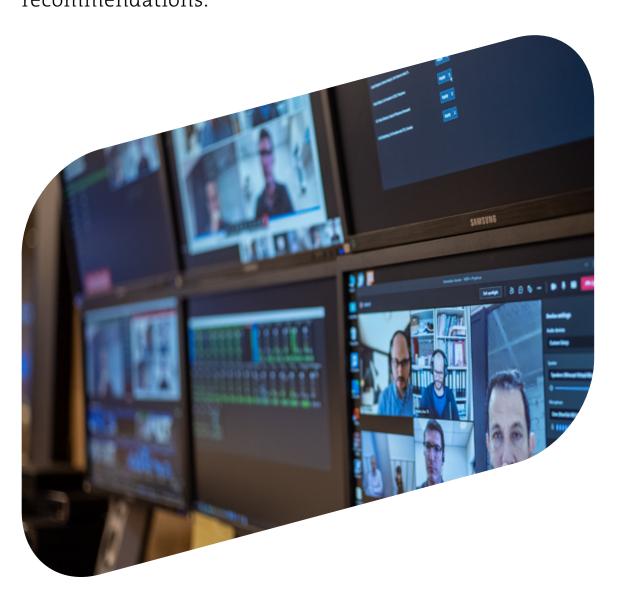
Looking Ahead

Strengthening the Israeli Innovation Ecosystem in 2021 and Beyond

In 2021, we plan to build on the success of our activities, connecting business, government and NGO leaders from around the world with Israeli innovation. In the realm of staying innovative, we are also launching several new initiatives that we believe will bring serious value to the ecosystem.

Research and Policy Institute

The Start-Up Nation Central Research and Policy Institute, launched in April 2021, is co-chaired by **Prof. Eugene Kandel** (previously the CEO of Start-Up Nation Central) and philanthropist **Paul Singer**. **Uri Gabai**, previously co-General Manager of Start-Up Nation Central, has assumed the role of CEO. The Institute aims to sustain Israel's long-term economic health by helping the country maintain its competitive high-tech edge through research and policy recommendations.



Cooperation with Regional Partners

The historic Abraham Accords have ushered in a new era of opportunity for the region. *Start-Up Nation Central* is well-positioned to connect governments and ecosystems, serving as a central connecter of participating nations around tech-based innovation. We had the honor to host prominent figures including the UAE Ambassador to Israel, H.E. Ambassador Mohamed al Khaja, the UAE Minister of State for Food and Water Security H.E. Mariam bint Mohammed Saeed Hareb Al Mheiri, and Bahrain's Undersecretary for International Relations, H.E. Dr. Shaikh Abdulla bin Ahmed Al Khalifa, all with an eye to expand innovation-driven partnerships.



Evolving Start-Up Nation Finder

In 2021, we continued to offer global players new, simplified, and more accessible ways to receive data and insights, to conduct research, and connect with companies. We added powerful features including an AI-based search engine, a new interface for communicating with ecosystem companies, a more intuitive page layout, improved UI, and more meaningful insights.

Going forward, *Finder* will support ecosystem navigation through user-specific insights and interactions:

- Create a tailored companies monitor
- Use traffic driven intelligence
- Get **user-specific** insights
- Get alerts and recommendations
- Find **info not available** on comparable sites
- Interact and receive introductions
- Reach **Start-Up Nation Central specialists**

Broadcasting Israel's Innovation Excellence to the World

Part of *Start-Up Nation Central's* mission is to share the story of Israeli innovation as a global problem-solver and raise awareness of these notable achievements around the world. We plan to launch a new **podcast series** "**DisrupTALK**," and produce insightful **explainer videos** and other inspiring and riveting stories from Israel and its innovation ecosystem.



Your 20-minute podcast roundup of Israeli innovation





Start-Up Nation Central's social media engagement growth in 2020-2021





Asif: Culinary Institute of Israel

In June 2021, *Start-Up Nation Central* officially opened the doors of **Asif: Culinary Institute of Israel** — a cultural center celebrating Israeli culinary tradition. A joint venture of *Start-Up Nation Central* and the **Jewish Food Society**, headed by **founder and CEO Naama Shefi**, Asif is host to the first online and physical culinary library in Israel, a continuously changing gallery, an organic farm, a test kitchen devoted to preserving and researching recipes, and an event space for culinary workshops and lectures.

Operating out of the ground floor of *Start-Up Nation Central's* iconic building in the heart of Tel Aviv, Asif will showcase Israeli technological innovation at the forefront of the global AgriFood-Tech revolution. Such technologies will be on display at the building's rooftop garden, where advanced irrigation and harvesting methods are being used to grow fresh produce.









Thank You

We would like to sincerely thank all of our partners, friends, and supporters for their commitment to helping the *Start-Up Nation Central* team strengthen the Israeli innovation ecosystem. We look forward to continuing our work in 2021 and beyond.

Philanthropic Partners

We are proud to share the many achievements we realized in 2020, and eager to highlight the many ways in which *Start-Up Nation Central* strengthened the Israeli innovation ecosystem.

As we reflect on a year characterized by a once-in-a-generation global catastrophe and new regional and global opportunities, we are grateful to our many partners and supporters whose commitment to our work remained steadfast.

Special thank you to **The Paul E. Singer Foundation and its professional staff**, our board - **Terry Kassel** (Chair), **Paul Singer**, **Karen Davidson**, **Raphael Ouzan**, **Dan Senor**, and **anonymous donors**, as well as the following philanthropic partners:

Sylvan Adams

Bank of America

The Russell Berrie Foundation

William Davidson Foundation

Sir Mick Davis

Fooksman Family Foundation

Alan and Diane Franco

Friends of the IDF (FIDF)

The Genesis Prize Foundation

Google Israel

Harold Grinspoon Charitable Foundation

The Jerusalem Development Authority

Jerusalem Foundation

Kemach Foundation

Robert K. Kraft

The Margaret and Daniel Loeb Foundation

The Marcus Foundation

J.P. Morgan

The Nachshon Fund

Julis Rabinowitz Family

Edmond de Rothschild Foundation (Israel)

The Charles and Lynn Schusterman Family Philanthropies – (Israel)

The Stef Foundation for Education for Creativity and Industrial Entrepreneurship



About Start-Up Nation Central

Start-Up Nation Central is the address for corporations, governments and investors to connect with the Israeli tech ecosystem. We catalyze growth opportunities by bringing Israeli tech innovation to global business and societal challenges.

Established in 2013 and headquartered in Tel-Aviv, Israel, *Start-Up Nation Central* is a not-for-profit organization funded by philanthropy.

About Start-Up Nation Finder

Start-Up Nation Finder is a free online platform for identifying and engaging Israeli tech organizations based on customers' specific interests. This Innovation Business Platform is a comprehensive knowledge hub on Israeli startups, investors, acceleration hubs, multinational corporations, and technology-based innovation associated with academic research. The open-source platform provides up-to-date information and insights on thousands of active Israeli tech companies.

For more information, please visit:

startupnationcentral.org and finder.startupnationcentral.org

