START-UP NATION CENTRAL

BUILDING BRIDGES, CREATING IMPACT

ANNUAL REPORT 2019

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STRENGTHENING THE ISRAELI INNOVATION ECOSYSTEM

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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

From the Desk of Eugene Kandel, CEO

It is my distinct pleasure and honor to present the Start-Up Nation Central 2019 Annual Partners Report – my fifth – offering insight into SNC activities and impact made possible by the generosity and guidance of our board, partners, and the steadfast innovative work of the SNC team.

In 2019, SNC focused its external efforts on **building bridges,** connecting the innovative Israeli ecosystem to the global economy; and **creating impact** via these bridges. We were privileged to present our work on these two themes at our annual Partners Summit, which was held in New York in November 2019. At the same time, SNC increased its local impact through our Human Capital efforts, and policy and community work. Our enhanced communications department has ensured increased coverage of these activities in media outlets in Israel and on the international stage.

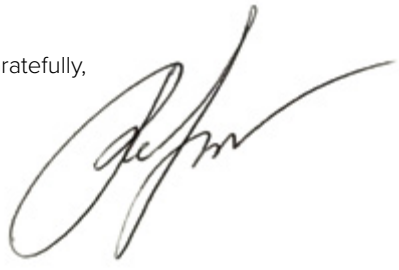
This report covers 2019. In a regular year, I would have predicted that in 2020 SNC would be doing more and better in roughly the same domains. Yet, not long after ushering in the new year, the world was thrown into a new reality with the eruption of COVID-19. In response, much of SNC's work pivoted to creating bridges between Israeli tech innovation for COVID-19 and institutions around the world. Whether addressing the urgent needs of countries, international organizations, and corporates to find Israeli solutions — technological or otherwise — to fight the pandemic; or creating insights into how the Israeli tech sector can benefit from the "day after" opportunities that this pandemic brings — SNC is there. This period is a test of SNC's ability to be nimble and function in difficult conditions. We are also using this time to thoroughly reevaluate our strategy, organizational culture, and structure to be even more impactful. We will continue reporting on all these developments in our monthly updates.

We are grateful to all of you, our dedicated partners, whose support and vision are key to our success. Our board — Terry Kassel (Chair), Paul Singer, Dan Senor, Karen Davidson, and Raphael Ouzan — along with our community of philanthropic thought partners and the team at The Paul E. Singer Foundation, help us remain strategic and impactful.

The encouragement and input that we have received from our partners inspire us to continue our quest to make Israel an innovative nation with the power to better the world.

Sylvan Adams
Bader Philanthropies, Inc.
Bank of America
The Russell Berrie Foundation
William Davidson Foundation
Fooksman Family Foundation
Alan and Diane Franco
Friends of Bezalel Academy of Arts and Design, Jerusalem
Harold Grinspoon Charitable Foundation
Jerusalem Development Authority
Julis Rabinowitz Family
Leo Noe and The Kemach Foundation
Robert K. Kraft
The Margaret and Daniel Loeb Foundation
The Marcus Foundation
J.P. Morgan
Paley Family Foundation
Pamela and George Rohr
Edmond de Rothschild Foundation (Israel)
Charles and Lynn Schusterman Family Foundation

Gratefully,

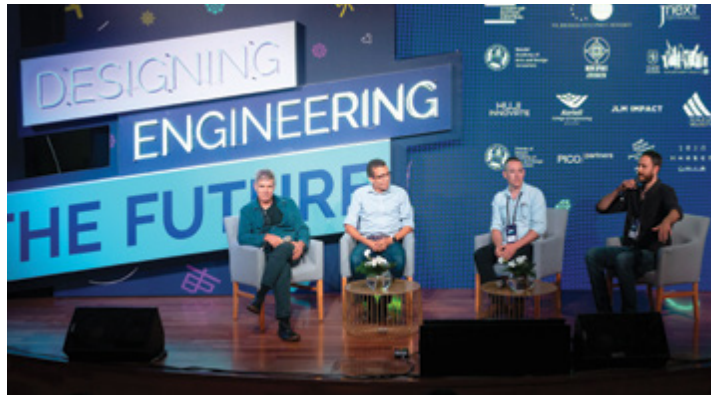


Professor Eugene Kandel

2019 HIGHLIGHTS

First Excellenteam Bootcamp Graduates

January 2019 ■ See page 38



Inaugural *Jerusalem: Where Tech Meets Design* Annual Conference

June 2019 ■ See page 45

First Israeli Companies Win the Financial Times / International Finance Corporation Awards

June 2019 ■ See page 41

Israel's Largest AgriFood Tech Event

September 2019 ■ See page 32

Koch Disruptive Technologies Invests $109M in Vaayar following SNC Engagement

November 2019 ■ See page 20

Second SNC Partners Summit, New York

November 2019

Michigan Governor Signs MoU With SNC to Tap Into Israeli Tech Solutions

November 2019 ■ See page 25

Israel Cycling Academy Partnership Launched

December 2019 ■ See page 21

DATA & INSIGHTS

Research & Analysis

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. SNC research and analysis informs all organizational work, including focus sector development, community building, and policy.

2019 Reports

The **High-Tech Human Capital Report 2019** produced in partnership with the Israel Innovation Authority (IIA), provides a snapshot of the Israeli tech human capital landscape. Findings are based on data from SNC's Finder, the Central Statistics Bureau, the Israel Innovation Authority, the Council for Higher Education Planning and Budgeting Committee, and a survey of 340 high-tech companies that collectively employ more than 90,000 people (constituting approximately one-third of the industry's employees).

The report shows key trends such as the increase in the number of high-tech employees, the shortage of trained technology workers, the difficulties in recruitment of inexperienced workers and under-represented populations, the impact of multinational companies, and more.

Israel's Agri/FoodTech Sector 2019 Report presents in-depth trends in the AgriFoodTech sector, currently in its second wave of innovation with 124 start-ups founded since 2016.

Start-Up Nation Central Digital Health Trends 2019 offers a brief synopsis of 2019 Digital Health sector trends, including an overview of the landscape by subsector, and an outline of investments by total funding and number of rounds.

The State of Innovation Report, a collaboration between SNC and PricewaterhouseCoopers (PwC), comprises insights from more than 70 innovation executives, in Israel and globally, on how corporations innovate within the vibrant Israeli ecosystem.

Start-Up Nation Central Industry 4.0 Trends Report 2018-2019 highlights and pinpoints Israeli Industry 4.0 trends within a sector rich with start-ups, incubators, automation vendors, MNCs, government/academic initiatives, and multinational industrial manufacturing R&D centers.

Industrie 4.0 Trendreport 2018-2019 Auf Deutsch – The report was translated into German and distributed to our German partners.

ders
Lena Rogovin
SVC

Lena Rogovin

Research Analyst and Sector Lead, Digital Health & Life Sciences

Why did you join SNC?

I made Aliyah from Moscow ten years ago – shortly after the book Start-Up Nation was published in Russia. When I moved to Israel, I started working in investment banking (where my experience lay). When the opportunity arose to join SNC, I was excited to begin a new path in a sector that had intrigued me for years.

What do you like about working at SNC and about your role?

SNC is a unique organization – we help amazing start-ups to grow, we accumulate data from the entire ecosystem, and we're unbiased. The team is great – good and interesting people, from different places and with different backgrounds. We have a lot to learn from each other.

My role is a great combination of research and communication with people, and it's never boring – just the balance I was looking for. My particular sector, Digital Health and Life Sciences, is exciting and impactful, which is very important for me.

What did you achieve in 2019 that you are particularly proud of?

Our annual Digital Health sector report and the events we organized around it gained a lot of traction and helped to strengthen the SNC brand as a knowledge center.

Where do you see your department going in the next year?

I think our department is the heart of SNC activity. We have an extensive amount of data, countless connections to the ecosystem, and a strong team with great ideas. I see our role as furthering SNC's knowledge base and its brand recognition in Israel and abroad.

What do you enjoy doing outside of work?

Reading, traveling, art, spending time with my family, and cooking. I am also on the steering committee of The Friends of Ein Harod Museum of Art.

Finder Innovation Discovery Platform

Finder, a leading resource for comprehensive data on the Israeli tech ecosystem, is a proprietary, free-of-charge platform developed and maintained by a dedicated team of SNC researchers and information specialists. Finder provides current information and insights on over 6,500 innovative companies, as well as on the investors, R&D centers, innovation labs, accelerators, incubators, hubs, communities, and co-working spaces operating in Israel. Newly launched in 2019, Finder.SDG helps impact investors, corporations, governments, and NGOs identify innovative Israeli companies with the highest relevance to the UN Sustainable Development Goals (SDGs). Also new to 2019, Finder maps over 50 innovative technology communities in Israel.

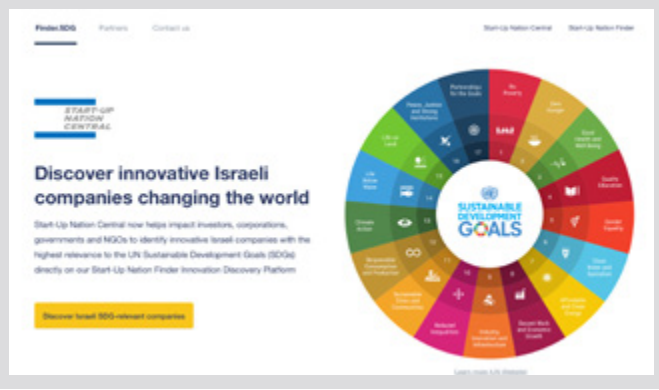
3,000,000
pageviews
(up 10% from 2018)

1,800,000
organic (unpaid) pageviews
(up 34% from 2018)

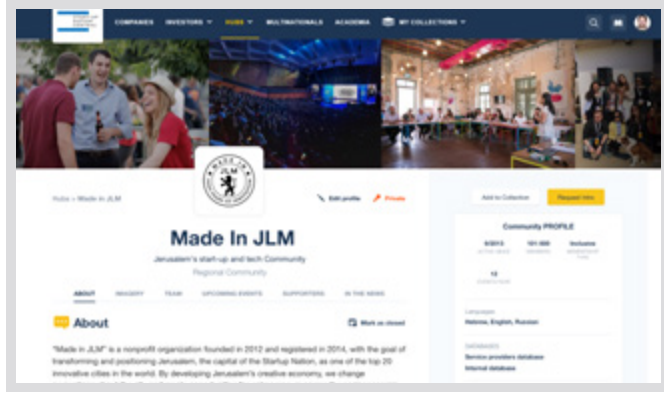
400,000
visitors
(organic traffic)

2019 Highlights:

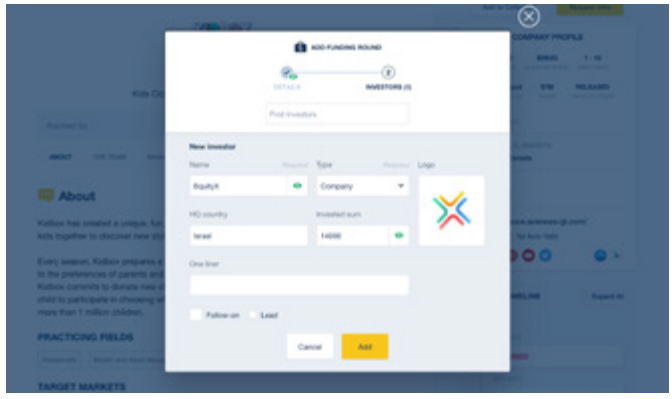
Finder.SDG is a new Finder feature, mapping hundreds of innovative Israeli companies that address the UN's Sustainable Development Goals (SDGs). Currently in Beta testing stage, the tag is assigned based on an algorithm that analyzes the company, its sector and its markets, and assigns a rating. Companies with the highest ratings are tagged as SDG-relevant.



Technology Communities – In 2019, SNC, together with the International Startup Community Leaders network (IS-CL), began mapping the 50+ technology communities that represent a crucial part of the Israeli innovation ecosystem. This "Communities" mapping joins the "Hubs" section in Finder, enabling a more comprehensive search across all ecosystem connectors.



Business lifecycle events (funding rounds and exits) – The addition of this feature significantly improves Finder's ability to map and display funding rounds and exits of companies.



11,000
new registered users from 120 countries

55%
of traffic originated from abroad

Fredrik Liljedahl

Finder Product Manager

Why did you join SNC?

I have a degree in business and economics and an MBA. All my peers were going into traditional roles in banking, but after moving to Israel I dove into the world of entrepreneurship, which is what I really enjoy. I had read the book, Start-Up Nation, and when I found out there was an organization connected to it, and that it had a job opening, I applied. I was very excited about the mission. I have been at SNC for four years and it has been incredibly fulfilling to see how it has grown.

What do you like about working at SNC and about your role?

If Israel is one of the centers of global innovation, then SNC is the center of that center. We are always involved in what is happening in the ecosystem; being at SNC feels like I am part of something relevant. I also appreciate my coworkers - they are respectful, challenge me, and make me laugh. They make coming to work enjoyable.

The thing I like the most about product management is the satisfaction of taking an idea and creating something tangible out of it – something that people use. I also like the challenge of working with so many teams – developers, customer support, data scientists, designers, marketing, analysts, and strategic partnerships.

What did you achieve in 2019 that you are particularly proud of?

The launch of Communities on Finder. When we think of what makes up an ecosystem, we think of the multinationals, investors, and start-ups. But the communities are really the oil in the machine – they don't have projects or money necessarily, but they have connections and knowledge. Adding them to Finder was the missing piece to the puzzle and provides a possible entry point for users who don't necessarily know who to connect with.

The SDG tagging on Finder was also an important project. It's good for Israel to gain exposure not just for creating unicorns [companies valued at $1B and above] and powerful technologies, but for producing things that make the world a better place.

Where do you see your department going in the next year?

In 2020 and beyond, I'd like to use Finder data to provide more insights for our users on a continuous basis. We are also aiming to improve users' ability to find the right investor or right company to invest in by providing suggestions for the right match.

What is one fun fact about you?

I grew up on a golf course (my father is a golf teacher) in Sweden.

What do you enjoy doing outside of work?

I meditate and write short stories. I also used to do Krav Maga quite a lot! It's the biggest self-defense method in Sweden.

CONNECTING TO THE WORLD

Engagements

Highly customized SNC engagements are a central tool for catalyzing collaborative efforts to connect the Israeli innovation ecosystem with large multinational corporations, governments, and NGOs from around the world. SNC works with the leadership of these entities to identify their most pressing challenges and connect them to the most relevant innovative Israeli solutions that can best address these challenges. SNC then continues to accompany and guide its clients in developing long-term connections with the Israeli innovation ecosystem.

2019 Highlights:

Koch Disruptive Technologies Invests $109M in Vaayar. SNC hosted a return four-day delegation for Koch Disruptive Technologies (KDT), a subsidiary of Koch Industries. This engagement led to an investment in Vayyar, an Israeli company that develops safe, mobile, low-cost 4D imaging sensors, enabling applications in such fields as cancer detection, people-tracking, vehicle automation, security, radiation-level testing, and construction.

From left: Brett Chugg (Managing Director, KDT) and Chase Koch (President, KDT) at SNC HQ.

Marubeni Corporation announces an allocation of $50M for technology investments in the U.S., Germany, Finland, and Israel. In the past year and a half, SNC hosted three delegations from the Japanese conglomerate, a global trader of goods and technologies with a $13B market cap.

Following their successful engagement with the Israeli Industry 4.0 (I4), AgriTech, Digital Health and Fintech sectors, Marubeni's Chief Digital Innovation Officer announced intent to invest in Israeli technologies in the fields of Healthcare, I4, AgriTech, and Smart Cities.

SNC and Marubeni are planning a **reverse engagement** "road-show" to Japan to introduce Israeli start-ups to leading Marubeni clients.

Marubeni delegates Naoki Kimura, Takeshi Kakimi, and Ryo Koyama, and SMBC's Eiko Ooka tour Tel Aviv's start-up scene.

CEVT Sweden opens a local office for innovation activities. CEVT, an innovation center for the Geely Group, a privately held global automotive group headquartered in China and the country's third largest automotive producer, visited SNC to gain a deeper understanding of the Israeli ecosystem. The engagement led to opening of this office with two local managers in early 2020.

CEVT delegation leaves SNC HQ.

Team Israel Start-Up Nation Explores Israeli SportsTech. Following the announcement of the SNC-Israel Cycling Academy (ICA) partnership, ICA performance and sports directors participated in a curated SNC engagement with nine Israeli start-ups in the fields of AI injury-prediction, nutrition management, and wearable monitors. Aimed at identifying innovative solutions for optimizing the team's performance in upcoming races, the ICA announced that it will pilot technologies developed by PhysiMax Technologies and Biobeat for its international professional team.

Talia Shekel, Strategic Partnership Manager (SNC), with Zadok Yehezkeli (ICA Media Manager), Kjell Carlstrom (ICA Sports Director), and Paulo Saldanha (ICA Performance Director).

ABInBev Open Innovation Platform Launched in Tel Aviv, with the goal of sourcing technological solutions in the fields of Cybersecurity, FoodTech, Industry 4.0, and AI. Prior to the launch of the open innovation platform, a 25-member delegation from ABInBev centers worldwide visited SNC to learn more about different models of operation in Israel. This was the company's sixth engagement with SNC. The delegates were introduced to nine cybersecurity start-ups, and the company closed a deal with SparkBeyond, a leading Israeli AI startup.

From left: Ilan Samish (CEO, Amai Proteins), Carlos Brito (CEO, AbInBev), and Avi Kreimer (Global Director of Innovation, AbInBev) at a 2019 SNC engagement.

DELL

Talia Shekel

Strategic Partnerships Manager

Why did you join SNC?

SNC is a one-of-a-kind organization and an inspiring place to work. It's rare to find an organization looking to 'do good' in such a professional manner.

What do you like about working at SNC and about your role?

I enjoy the diversity of people and the diversity of my work. Every day is different - hosting delegations, conducting market research, organizing challenges.
I like meeting people from around the world and trying to help them through innovation. Even when we don't take on a particular client, we always point them in the right direction.

What did you achieve in 2019 that you are particularly proud of?

I joined SNC in 2019. I'm proud that I learned the ropes quickly andhosted over ten delegations by the end of the year.

Where do you see your department going in the next year?

I think the quality of our engagements will encourage greater numbers of multinational corporations to bring delegations to SNC. We will also continue to create impact through partnerships, leading to POCs, agreements, and investments, which we would ultimately like to have become a local presence.

What is one fun fact about you?

I played basketball until I started my army service, but my basketball career was limited by my height (I'm 5ft.) After I finished my service, I started running and recently completed my second marathon in New York City – where I was born – on my 30th birthday.

What do you enjoy doing outside of work?

I enjoy running, travelling, and camping.

Innovation Bridges

SNC builds strong bi-lateral bridges in key geographical markets and sectors, facilitating a flow of opportunities and collaborative efforts between the markets. SNC is active in markets that:

- Offer significant economic opportunities for Israeli companies
- Are difficult for Israeli companies, particularly small ones, to access
- SNC has engaged with a trusted local partner, who can provide access to key regional stakeholders and their unique technology needs. These partners help SNC raise interest in Israeli technology and match their market's needs with the relevant Israeli solutions.

Global Finder Network

The Global Finder Network (GFN) empowers emerging innovation hubs worldwide to build and manage their own regional ecosystem databases, increasing their internal connectivity and global visibility. The GFN platform creates opportunities for cross-ecosystem pollination and multilateral collaboration, sharing of best practices, and direct connection with key individuals and companies in local markets. Partners receive a well-established and constantly upgraded platform based on SNC's Finder platform, as well as methodology, training, and membership in what is becoming a global network. In addition, partners within the network receive a partnership manager from SNC that works closely with them to leverage Israeli technologies for their local market's benefit and growth.

2019 Highlights

Texas joined the Global Finder Network in September 2019 via **Houston Exponential (HX),** a nonprofit organization created to accelerate the growth of Houston's innovation ecosystem. HX is leading the charge to turn Houston into a hub for high-growth companies by creating pathways for innovation to flow and scale. This is the second state in the US to join the GFN, bringing the network count to five countries\states engaging in ecosystem development and global innovation partnerships.

Houston Signing for Texas - Guy Hilton with Harvin Moore, President of HX

The Michigan Israel Business Accelerator (MIBA) launched its platform, **startupMichigan,** in May 2019, at an event in Detroit that included Michigan tech ecosystem leadership.

Guy Hilton, General Manager of Start-Up Nation Central, addresses the audience at the Global Finder Michigan (startupMichigan.com) launch event, organized by MIBA in Detroit.

In November 2019, **Michigan Governor Gretchen Whitmer signed an MoU** with SNC to work to "connect innovative ecosystems and identify Israel-based companies with opportunities to expand operations into Michigan to further the development and application of emerging technologies ... [and] offer a blueprint for connecting the innovation ecosystems strategically." Whitmer said: "I appreciate the partnership of Start-Up Nation [Central] as we work together to build the connection that will transform our transportation landscape and lead to stronger relationships between Michigan and Israel."

Michigan Governor Gretchen Whitmer and SNC CEO Prof. Eugene Kandel, sign an MoU, pledging their commitment to work closely together to identify Israeli technologies that can be adopted by Michigan-based companies.

Callaghan Innovation – New Zealand's innovation authority - officially launched the **Scale-Up NZ** platform in April 2019 at an event held in Auckland.

SNC CEO Prof. Eugene Kandel, addresses the audience during the Global Finder New Zealand (Scale-Up NZ) launch event.

Bridge to Texas Medical Center

SNC, in partnership with TITP (Texas Israel Technology Partnership), has developed a landing pad for Israeli innovation at the Houston-based 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. Identifying the most relevant technologies, models, and know-how to address TMC's pain points, the project increases awareness of Houston as a potential market for Israeli companies while promoting Israel as a leading healthcare technology player in the city.

2019 Highlights

Baylor College of Medicine delegation visited Israel to meet with relevant start-ups, leading to a paid pilot with one Israeli company (Lynx.MD). A successful community event took place during the visit in which Baylor's Deputy Chief Ventures Officer shared the College's needs with the Israeli HealthTech community.

Shawn Davis, Deputy Chief Ventures Officer, presents Baylor College of Medicine's challenges to the Israeli innovation community at SNC's Hub, together with Anat Zeidman, Managing Director of TITP.

TMCx Accelerator's fast track into TMC – In 2019, three Israeli companies participated in TMCx, TMC's digital health accelerator, breaking the record for Israeli companies in the program. Two Israeli companies (GiantLeap and DosentRX) signed agreements with Houston-based entities and opened offices in Houston after the program. They are both in advanced conversations with TMC-based hospitals towards paid pilots.

Delegation of 12 Israeli start-ups visit TMC as part of a partnership between SNC, the Israeli Export Institute, and the Foreign Trade Administration of Israel's Ministry of Economy. The delegation held over 100 meetings at five TMC hospitals and institutions.

Bridge to India

SNC has played an important role in creating increased business ties around Israeli innovation in India, particularly for companies in the fields of agriculture and digital health. SNC has created a clear path for these companies to enter the Indian market, from testing and adapting solutions, to facilitating commercial agreements and creating scale in these fields.

2019 Highlights

The SNC collaboration with **Syngenta Foundation India (SFI),** an independent NGO that helps smallholder farmers adopt technologies to increase productivity, focused on introducing Israeli agricultural technologies to smallholder farmers. SNC is working with SFI to support Israeli companies in the integration of their technologies up to the stage of commercialization.

SNC is a knowledge and design partner, using its unique convening abilities to convene strategic partners for the project, such as the Israeli Innovation Authority, Tel Aviv University's Nitsan Sustainable Development Lab, and several Indian universities. SNC designed training in Israel for the SFI team and service providers who support the entry of Israeli start-ups into the Indian market. Two Israeli startups (Groundwork BioAg and Sailog) successfully piloted AgriTech solutions with smallholder farmers. Six additional start-ups are scheduled to begin piloting their solutions in 2020.

Baskar Reddy (Executive Director, Syngenta Foundation India), with Simon Winter (Executive Director, Syngenta Foundation) during an SNC engagement.

NATHEALTH (Healthcare Federation of India) is a large association of healthcare providers in India. SNC signed an MoU with NATHEALTH in 2019 to help implement Israeli technologies in hospitals across India and connect Israeli health care experts to the NATHEALTH system.

From left: Siddhartha Bhattacharya (Secretary General, NATHEALTH), Dr. Suarshan Ballal (President, NATHEALTH), Wendy Singer (Executive Director, SNC) and Vered Mivtzari (Strategic Countries Director, India, SNC).

AHPI (Association of Healthcare Providers in India) partnered with SNC to implement Israeli technologies in hospitals across India. SNC participated in AHPI's annual conference as a speaker and brought nine Israeli startups to the conference. Two start-ups, Beecardia and Heramed, have completed successful pilots with AHPI and are currently in the process of commercializing their technologies in India.

WIPRO Establishes Industry 4.0 Incubator in Israel – Having identified the value of deep engagement with the Israeli ecosystem via its acquisition of the Israeli chipmaking plant Givon, WIPRO - India's leading IT and consulting company launched an incubator with six Israeli partners.

Vered Mivtzari

Strategic Countries Director, India

Why did you join SNC?

In 2014 I moved to India to work as an Economic Attaché at the Israeli Embassy. In my free time, I volunteered with an organization that helps women in Delhi, eventually becoming the president of the organization. I joined SNC before returning from India; I felt that the role was a good combination of my professional and volunteer background. When I joined SNC, our work in India was just beginning, and it was exciting to build something from the ground up.

What do you like about working at SNC and about your role?

I like the mission and the fact that as an NGO we are able to do something pure and well-intentioned. I also like the business development and ambassadorial aspects of my work. Helping Israeli companies do business in India is not easy, but our unique ability to bring the right stakeholders to the table makes our work much more impactful.

What did you achieve in 2019 that you are particularly proud of?

Our project with the Syngenta Foundation. Using their "agripreneur" model that aims to solve the pervasive issue of corruption that skews the market and hurts farmers, they created an online platform to centralize all business interactions between suppliers and farmers. Our goal is to get as many Israeli companies on the platform as possible by doing as much on-the-ground validation as we can. Once, we did 100 pilots with just one Israeli company!

We don't just help with the "matchmaking" though, we also give Israeli companies tools to avoid pitfalls, and bring in partners such as the Israel Innovation Authority which now funds 50% of the pilots. We've also brought the "agripreneurs" themselves to Israel for training, empowering them to become technology ambassadors in India.

Where do you see your department going in the next year?

My goal is to really define what models work best in India and then develop a replicable model that can be adapted in other developing countries.

What is one fun fact about you?

My husband and I were lined up on stage to greet [Prime Minister] Modi at a state ceremony in India. As he passed us, he noticed that I was in a sari, and turned to the crowd and proclaimed: "the perfect Indian."

What do you enjoy doing outside of work?

I enjoy gardening and making my home more sustainable: we have solar panels, and we compost and recycle water.

Bridge to Africa

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. In addition, they have limited access to information, and are at the mercy of a chain of intermediaries from farm to market that profit at their expense. 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.

2019 Highlights

SNC continued work on a joint MoU with the **Syngenta Foundation Africa** (SFA), an independent NGO that helps smallholder farmers adopt technologies to increase productivity. SFA asked SNC to help adapt its agripeneur model from India (see page 27). The pilot project is set to launch in Kenya in January 2020, and expand to Mali, Senegal, and Nigeria. SNC, with its unique ability to convene the right partners for each project, serves as a knowledge and design partner.

Disease eradication is a topic of major concern in Africa. In 2018, SNC began working with **Goodbye Malaria,** an African organization that aims to eradicate malaria in Mozambique with a $20M commitment from the Gates Foundation and the Global Fund. In 2019, SNC introduced the organization to more than twenty relevant Israeli solutions; four are currently in direct field-tests and commercial discussions have begun.

From left: Sherwin Charles (CEO, Goodbye Malaria), Michael Levinrad (Goodbye Malaria Israeli representative) at SNC HQ.

SNC hosted the **One Acre Fund,** a key player in Africa's agriculture sector. The One Acre Fund works to improve the lives of smallholder farmers - focusing on food security and the livelihoods of African subsistence farmers farming one acre of land or less. SNC introduced the delegates to key AgriTech companies, opinion leaders, innovators, and institutes in the Israeli ecosystem to spark new thinking on how they can leverage their infrastructure and capabilities to create broader impact.

From left: Yair Fonarov (Fintech Analyst, SNC), Vered Mivtzari (Strategic Countries Director, India, SNC), Akifumi Kita (Impact Ventures Growth Director, One Acre Fund), Matt Freeman (Senior Director, Business and Partnership Development, One Acre Fund), Yoav Barlev (Strategic Partnerships Manager, SNC)."

Following a successful engagement during AgriFood week, SNC hosted PepsiCo's CEO of Sub-Saharan Africa, CEO of Eastern Europe, and SVP & Global Head of M&A. PepsiCo recently acquired the African Pioneer Brands for $1.7B, and as part of the acquisition agreed to help build the African start-up ecosystem. The PepsiCo team visited SNC to learn how to build such an ecosystem, and to explore Israeli solutions for rapid deployment in Africa.

Focus on Sectors

Agri/FoodTech and Industry 4.0

SNC cultivates focus sectors that have the potential to become global leaders in solving fundamental world challenges and are highly likely to attract foreign clients and investors. Growing market demand and continually evolving technology make these sectors strategic to the overall development of the Israeli innovation ecosystem.

SNC fosters deep connections within the Israeli ecosystem and with global corporates, strategic investors, and influencers such as international consulting firms, government agencies, and academia. It works with these players to reduce product time-to-market; attract new clients, partners, and capital; and enhance commercial traction, reinforcing Israel's reputation as a leading global solution hub.

2019 Highlights

Agri/FoodTech

Investors Deal-Flow Platform launched to connect investors to relevant start-ups in an efficient and scalable manner. Over sixty registered leading strategic investors-- including BASF Ventures, ADM Ventures, DSM, Cultivian-Sandbox, Syngenta Ventures, Innovation Endeavors, Germin8, New Crop Capital, CapAgro and Finistere-- have led to 276 introductions and two investments to date.

With the goal of strengthening the connection between local start-ups and global accelerators, SNC launched the **"Israel Radicle Challenge"** with the acceleration fund of the same name backed by leading AgriTech investors, and the Israeli VC OurCrowd. Our of the 80+ applications received, WeedOut, a bio-herbicide company, was chosen to receive a Radicle investment.

SNC was a major partner in Israel's **AgriFood Week,** consisting of two main conferences, run for over eight years by Trendlines and Greensoil Investments:

Foodtech IL, run in collaboration with the Strauss Group, hosted over 1,600 participants.

AgriVest - 750 international entrepreneurs, investors, executives, industry leaders, and academics representing over 200 multinational corporations explored opportunities for global partnerships and collaborations.

In addition to 17 delegations and innovation segments affiliated with AgriFood Week, SNC hosted:

SmartFood TLV: a roundtable MNC event addressing challenges in the areas of food, nutrition, and agriculture.

Global Accelerators Bootcamp: exposed various accelerator programs (SparkLab Cultiv8, FoodTech Accelerator Milan, and StartLife) to the Israeli ecosystem. Pre-selected companies had the opportunity to pitch to SparkLab Cultiv8, a leading Australian accelerator, which chose four Israeli start-ups for its current cohort.

Industry 4.0

II4 CEO Summit – SNC, in partnership with Grove Ventures, produced the 2019 *II4 CEO Summit: Embracing Digital Transformation,* sponsored by Deloitte's U.S. manufacturing consulting service. Summit participants were CEOs and top innovation executives from companies such as Bouygues Telecom, British Petroleum, Caterpillar, Ford Motor Company, Jaguar, Land Rover, PepsiCo, Siemens, Toshiba, illustrating Israel's status as a hub for the "next" Industrial Revolution.

Israel's Industry 4.0 sector has grown to 230 companies, up from 146 in 2014, with over $650M in venture capital funding in 2019. The disruptive technological advancements for which Israel is renowned in AI, computer vision, cybersecurity, smart sensors, and automation processes, are helping to change the way products are manufactured, designed, and delivered.

Israel Dealmakers Summit - Hosted by Landmark Ventures, SNC sponsored a two-day summit focused on Israeli tech in San Francisco. SNC spotlighted the Israeli Industry 4.0 sector, leading a delegation of nine start-ups and introducing them to dozens of investors and corporates during five curated events. As a result, both Georgia Pacific and CEVT sent delegations to visit SNC (see page 20).

SNC launched the **Industry 4.0 Global Challenges Survey** to define the corporate and industrial challenges faced by multinationals and foreign investors as they navigate the Israeli Industry 4.0 ecosystem. The survey became a crucial tool in defining global challenges, providing SNC with a way to quickly connect start-ups to corporates looking for solutions.

In 2019, SNC increased its collaboration with the German **Mittelstand**, family-owned small-medium enterprises (SMEs) that are the backbone of the German economy. Deep research, mapping 140 top Mittelstand companies in the logistics field, led to a delegation of 65 Hamburg-based Mittelstand companies and a digital meetup series "Mittelstands Meet the Start Up-Nation," which was held in parallel in Munich and Tel Aviv. SNC also presented at Hannover Messe, the largest industrial conference in the world, and at the Hinterland of Things conference in Bielefeld, Germany.

SNC delegates tour a Gundlach Packaging plant in Germany

SNC, in collaboration with the Bertelsmann Foundation, visited Germany as part of a **reverse engagement** to launch an "Israel-Germany Innovation Day" and a Pitch Night with three Mittelstand companies in collaboration with the Founders Foundation. Joining SNC's delegates were five Israeli Industry 4.0 companies offering digital solutions for industrial manufacturing. The Israeli companies participated in factory tours at Miele, Gundlach Packaging, and Phoenix Contact, during which they learned about the challenges facing each company and how they go about searching for innovation. Two proofs of concept with start-ups Wonderlogix and Axonoaize resulted from the visit.

START-UP
NATION
CENTRAL
and
Logistics Tech
Innovation in Israel
Irit Avni
Manager

Yariv Lotan

Head of Strategic Sector Development

Why did you join SNC?

I was intrigued by the topic of corporate innovation and the change it affects within the corporate world. Throughout my career I've worked in private equity, venture capital, investment banking, and as an entrepreneur. Joining SNC is where it all came full circle. It was my first time working for a nonprofit, which has allowed me to merge all aspects of my experience into one: creating value for all parties – startups, corporates, investors – in a nonpartial way.

What do you like about working at SNC and about your role?

I find the work tremendously challenging and interesting. It is fulfilling to be able to create impact on a national level. For example, with Industry 4.0, we took something in a nascent stage and shaped it into a sector that Israel will be known for.

What did you achieve in 2019 that you are particularly proud of?

The AgriTech Investors Platform. Our goal was to create a huge database of opportunities, because that is what corporates are interested in. The platform has led to several investments already.

I'm also proud of the partnerships we built with German Mittelstand companies in 2019. Their first group visit to Israel led to the signing of an MoU with the Bavarian government. This drew the attention of the North-Rhine Westphalia government, which is now also expressing interest in getting on board.

Where do you see your department going in the next year?

My goal is to help our focus sectors create more scalable impact by creating hubs of key stakeholders – corporates, investors, and accelerators, along with public influencers such as consulting firms, academia, and government innovation offices – that will ultimately create synergies and strengthen the Israeli ecosystem.

What is one fun fact about you?

I signed up for my first triathlon three days before the event and was nearly disqualified for using a motorbike helmet.

What do you enjoy doing outside of work?

Carpentry. I like building all sorts of things with wood and metal. Right now I'm building a staircase and deck furniture.

STRENGTHENING THE ISRAELI INNOVATION ECOSYSTEM

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 High-Tech Human Capital Report 2019, conducted in collaboration with the Israel Innovation Authority, there are 18,500 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.

SNC has identified several populations, namely women and the Arab population, who struggle to find sustainable employment in today's market. With the help of sector experts, SNC analyzed the barriers that prevent these populations from reaching their employment potential, and implemented the findings in the development of programs specially designed to fast track these populations into Israel's tech ecosystem via its operational arm, Scale-Up Velocity.

EXCELLENTEAM: POST-ACADEMIC INTERVENTION

While a computer science degree provides a solid foundation for the programming field, there is usually some dissonance between academia and practical industry skills. Those 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 its partners launched Excellenteam— a four-month bootcamp for Jerusalem-based Arab and female Haredi computer science graduates that bridges the gap between academia and practice and helps them integrate into the high-tech industry. 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, and 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 four-month cohorts, with parallel classes for Haredi women and Arab men and women. Ninety percent of first cohort graduates were placed in core programming roles in leading high-tech companies such as Amdocs and Mobileye, earning average starting salaries of 17,000 NIS, higher than our initial pre-course estimation of 12,000 NIS and significantly higher than they could have expected to earn without intervention.

Excellenteam Cohort I graduation, January 2019

Students present their final projects at the Excellenteam Cohort I graduation, January 2019

ADVA: 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% of them opt to study computer science. In a decade, there will be more Haredi computer science students in seminaries than secular women pursuing similar degrees in all Israeli universities combined.

Unfortunately, the current seminary computer science program is out-of-date and does not correspond to the hiring needs of tech companies. Every year, this mismatch leads to a loss of hundreds of potential high-quality candidates for the industry and hundreds of high-paying jobs for these women.

In an unprecedented move, leading Haredi Rabbinic Council members asked SNC to redesign the two-year seminary computer science curriculum. As a result, SNC established Adva, a revamp of the program in three leading seminaries, with industry partners Google, Mobileye, and IBM.

The second Adva cohort began in September 2019, following an intensive preparatory course in mathematics. Participants receive a government-recognized certificate upon graduation. In addition, in order to be better prepared for rigorous programs such as Adva, some six hundred high school students in the participating seminaries have also begun studying mathematics and English at the highest matriculation levels.

PROFESSION FOR LIFE: INTEGRATION OF HIGH-POTENTIAL IDF SOLDIERS

An additional untapped population identified by SNC are soldiers who have just completed their army service. SNC and the IDF's ATAL Technology and Logistics Directorate, in partnership with the Friends of the Israel Defense Forces (FIDF), 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 second cohort graduated in September 2019. Its success led to a partnership with the IDF's Cyber Directorate to launch a program that will train recently released combat soldiers to enter the private cybersecurity sector.

Profession for Life graduates at SNC HQ

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 enhancing their capacity to enter the international arena. Particular emphasis is placed on creating activities that support our focus sectors—Agri/FoodTech and Industry 4.0—verticals, and specific focus groups that require attention.

In 2019, SNC hosted approximately 130 meetups, events, and workshops in partnership with over 80 communities, investors, organizations, and ecosystem players.

2019 Highlights

FT/IFC Transformational Business Awards – SNC was approached by the International Finance Corporation (IFC), an arm of the World Bank Group, and the Financial Times (FT) media company, to help source relevant Israeli companies for the Transformational Business Awards, a competition highlighting groundbreaking long-term private sector solutions to major development issues relating directly to achieving the UN Sustainable Development Goals (SDGs). Six Israeli start-ups were awarded the 2019 Financial Times (FT)/International Finance Corporation (IFC) Transformational Business Awards, out of a total of 14 awards selected from 270 global competitors. This was the greatest number of Israeli entries and finalists – and the first ever Israeli winners – in the 13-year history of the awards.

From left: Ravi Mattu (Deputy Asia News Editor, Financial Times), Samir Abhyankar (Partner, TPG Growth), with Ariel Beery (Co-Founder & CEO, Mobile ODT) receiving his award for Health, Wellness and Disease Prevention, and Katherine Ward (CCO, Healthy.io) receiving the runner-up award.

EU/IL Municipal Community Leaders Summit – SNC, together with the European Institute of Innovation and Technology (EIT), initiated a municipal leader's summit at SNC headquarters. Fifteen European ecosystem leaders attended the week-long summit. The highlight of the week was a full-day workshop of peer learning on ecosystem development for Israeli and European ecosystem leaders. For 95% of the European participants, this visit was their first time in Israel.

Panelists, from left: Oded Barel-Sabag (Director, Jnext), Amit Lavy (CEO, Wize), Yael Ophir (Executive Director, HealthIL), Eran Levy (General Manager, Enel), with Moderator Daniela Kandel (Innovation Bridges Director, SNC)

The Growth Company CFO Forum, initiated in partnership with the Israel innovation Authority and the Growth Company Forum, aims to provide CFOs of young companies the tools and knowledge to help them make better decisions as they reach their growth phase, rather than going the expected M&A route. Identifying CFOs as strategic figures in a company's decision-making process has been the key to the forum's success. We plan to continue this work in 2020.

Growth Company CFO Forum participants in the Hub.

Michal Seror

Michal Seror

Community Development

Why did you join SNC?

I began as an external project manager for SNC, so I knew it since it was a small organization. Watching it grow was inspiring, and I joined full-time when the organization created a community-building position, which I felt had the potential to be a very meaningful role. At the time, SNC was skilled at creating global connections, but was less known within Israel. Creating a local network was key for us, and in turn, we've been able to bring a lot of value to the local ecosystem.

What do you like about working at SNC and about your role?

One of the most amazing things about this organization is the people. I am actually happy to see the team every day. Everyone genuinely likes and is passionate about what they do. I also like that there's a culture of "getting stuff done."

I like that my role involves being in constant contact with people, and that it allows me to meet the entire ecosystem: investors, multinationals, and start-ups. I'm also usually the one who gets feedback from them, so I can really feel the impact of SNC's work.

What did you achieve in 2019 that you are particularly proud of?

The two main things that excited me about 2019 were mapping Israeli tech communities on Finder, and our collaboration with the International Finance Corporation (IFC). The process of getting a workable definition of the term "communities" was challenging but rewarding; we took something hard to define and narrowed it down to six different types. We have since shared the methodology with our Global Finder partners who are really excited about it.

Our collaboration with the IFC started out small: they wanted our help sourcing more Israeli applications. They only had one Israeli runner-up in their thirteen-year history. We helped to spread the word and held an event to publicize the competition, and they ended up with 35 Israeli applications that resulted in 13 Israeli finalists and 6 winners. This completely exceeded our expectations and showed that strategic collaborations can lead to huge wins.

Where do you see your department going in the next year?

I would like to bring the concept of communities to the awareness of the multinational corporations we work with. Sharing their needs, decision making processes, and even how their machines work can bring huge value to Israeli startups with limited industry exposure.

What is one fun fact about you?

I have a skipper's license from when I lived in New Zealand.

What do you enjoy doing outside of work?

Work and family take up most of my time, but I really enjoy practicing yoga when time permits.

"Jerusalem is the leading Life Sciences cluster in Israel, with the highest density of Life Sciences startups in the country and highest in the world, together with San Diego."

— Startup Genome Report 2019

Jerusalem Tech Ecosystem

Jerusalem is home to over 400 tech companies, 20 multinational R&D centers, and 18 venture capital funds; with a cumulative $233.5M invested in 2019 (up from $180M in 2018). Diverse and complex, Jerusalem's tech ecosystem is viewed - in and out of Israel - as a model for other growing ecosystems. SNC's Jerusalem team views the city as a testing ground for strategic projects that, where successful, can be scaled elsewhere.

By mapping Jerusalem's ecosystem, comprised of world-class academic institutions, core technologies for which it is already recognized (life sciences, machine learning, and AI), and a diversity of talent, SNC aims to strengthen and support these key areas through targeted activity:

- Convening key Jerusalem tech stakeholders and government/academic leadership to create a unified strategy for strengthening the city's ecosystem
- Amplifying Jerusalem's technology successes by increasing exposure of the city's tech sector to international companies, investors, and government leaders from abroad; and ensuring increased marketing and media stories about its tech ecosystem
- Using the city's growth as a case study to assist other cities in building their ecosystems

2019 Highlights

Jerusalem: Where Tech Meets Design is a series of events organized by SNC's Jerusalem team that forge deeper connections between the city's design and engineering communities. Home to a flourishing tech ecosystem and a continually growing community of design school graduates and young designers, these two Jerusalem communities were not meeting and leveraging each other's existence. The result was an ecosystem (and economy) challenged by the departure of an overwhelming majority of design professionals who were mainly moving to central Israel. Jerusalem: Where Tech Meets Design creates a nexus point between these two communities. The events attract national and international attention to Jerusalem's ecosystem by branding it as a city with unique resources around tech and design. In 2019, over 1000+ designers, engineers, and entrepreneurs participated in three major events:

The Tech Meets Design first annual conference, **Designing | Engineering the Future,** took place in June 2019 at the Israel Museum in Jerusalem. The conference presented a range of high caliber, thought-provoking talks focused on the mobility, materials, home, food, health, and education sectors.

On the day of the (anticipated) landing of the SpaceIL spaceship on the moon, **Tech Meets Design** presented **"Beresheet: The Journey to Space,"** featuring Dan Goldin, former head of NASA, who shared the struggles that NASA's design and tech teams had before each launch into space.

DMARS Co-Founder Moshe Zagai and Bubble Base CEO Helen Wexler, with SNC Executive Director Wendy Singer, and former NASA Administrator Dan Goldin.

Med Meets Design focused on the role design plays in medical devices and healthcare. Speakers included Prof. Haim Lotan, Head of Cardiology at Hadassah Medical Center, and Michal Eitan, a lecturer at Bezalel Academy of Fine Arts and Design and a public health researcher and designer.

Med Meets Design event, held at Hadassah's BIOHOUSE Labs in Jerusalem.

Jerusalem's tech ecosystem is geographically dispersed and holds far less organized meetings that that of Tel Aviv. To redress this, SNC hosted 9 forum meetings in 2019: The Jerusalem Tech Forum, the HR Managers Forum, the Marketing Managers Forum, the Heads of Accelerators Forum, and a Workplan Forum with many of the city's key stakeholders. These gatherings allowed groups of high-level tech professionals to come together and address shared challenges.

Half-day event for AIPAC's President's Cabinet delegation, with a Human Capital panel of Excellenteam alumni and an innovation showcase highlighting six disruptive technologies coming out of Jerusalem.

Full day visit of 31 Economic Attachés from 29 embassies.

JERUSALEM
TECH
DESIGN

Inbal Gottesman

Jerusalem Ecosystem Manager

Why did you join SNC?

Innovation has always interested me and I have always gravitated towards social entrepreneurship. Before joining SNC, I worked at New Spirit (a Jerusalem-based NGO), where I taught communities how to build social businesses and cooperatives, something I learned from being on the founding teams of TOM (Tikkun Olam Makers) and Resisim (a nonprofit dealing with PTSD in Israeli society). To me, SNC represents the nexus of influence, innovation, and impact on a global scale.

What do you like about working at SNC and about your role?

We conduct our business in a for-profit manner, even though we are a nonprofit. I also like that we choose projects based on their potential impact, and that we never compromise on professionalism or quality. I like the diversity of people at SNC - everyone comes from a different background, and this also brings about diversity in thought.

My role brings many of my passions together and allows me to work on them under the same umbrella. I really care about Jerusalem, and love that through my role I can share its successes and stories. I also care deeply about bringing innovative thinking to Jerusalem; as one of the most ancient cities in the world, it is the ideal testbed for innovation.

What is one goal that you achieved in 2019 that you are particularly proud of?

The Tech Meets Design (TMD) annual conference. I had always dreamed of bringing the South by Southwest festival to Jerusalem, so when I joined SNC and heard about TMD, it connected perfectly to my vision of what Jerusalem can be. The conference was a huge success with 16 speakers, half from abroad. The fact that we created a conference that really raised the bar in the Jerusalem landscape makes me incredibly proud.

Where do you see your department going in the next year?

In 2020 we are putting a particular focus on two research projects. The first is the Jerusalem Ecosystem Report, that aims to make Finder data accessible to global entities that don't know Jerusalem as a tech city. We want policymakers, investors, and of course, our own team to have access to better data-driven insights.

The other research project is a study on designers in tech companies, conducted with Israel's two leading design schools, Shenkar and Bezalel. It will measure the impact of what happens when "Tech Meets Design;" we want to verify and quantify the claim that companies built with designers inside are stronger.

What do you enjoy doing outside of work?

I am a creative at heart, so I enjoy everything from refurbishing furniture, to painting and paper maché. I also belong to Fem JLM, a community for Jerusalem-based female entrepreneurs.

What is one fun fact about you?

I taught myself to swim when I turned 20, but never thought I would be able to do much in the water. When I turned 30, I did a scuba diving course in Mexico and earned one star!

Policy

A coordinated government strategy is essential to ensuring Israel's technological edge in the coming years and decades. The Israeli innovation policy mandate is currently divided between several government entities, including the Israel Innovation Authority which promotes R&D in the private sector, and the Council of Higher Education which is in charge of research and training in academia. Other government entities such as the Budget Department and the Tax Authority at the Ministry of Finance influence policy in dramatic ways. While these entities sometimes collaborate on specific projects, there is no centralized policy-coordination mechanism. SNC helps this complex system better coordinate policy measures by serving as a convener, sounding board, and provider of research and data.

In 2019, SNC worked with the government on issues surrounding Israel's high-tech labor shortage and participated in discussions regarding the country's long-term strategy for the health of the tech ecosystem.

2019 Highlights:

SNC CEO Eugene Kandel chaired the Israel Democracy Institute's **Eli Hurvitz Conference on Economy and Society.** The conference focused on key challenges facing the Israeli economy, including the acute labor shortage.

SNC maintains close contact with government agencies that promote innovation, especially the Israel Innovation Authority. Several of the initiatives discussed are now in advanced stages. These include:

- Covering part of the cost of hiring high-tech investment analysts for institutional investors to encourage Israeli investment in local companies
- Policies to increase debt financing for tech companies
- Alternative methods besides direct grants, such as tax credits, to support high-tech companies
- Strategies for scaling up Israeli start-ups, encouraging independent Israeli companies to remain in Israel and grow
- Constant dialogue regarding human capital policies

TEL AVIV OFFICE
28 Lilienblum Street
Tel Aviv, Israel

JERUSALEM OFFICE
2 Po'alei Tsedek Street
Jerusalem, Israel

CONTACT US
Laura Gilinski
VP of Philanthropic Partnerships
Tel: +972-544-353550
Email: laura.gilinski@sncentral.org