



Israeli Digital Health: Investors Perspective

Levi Shapiro, Founder, mHealth Israel

mHealth Israel: Join Our Community



Database of 250+
funded startups



Conferences:
June and Feb

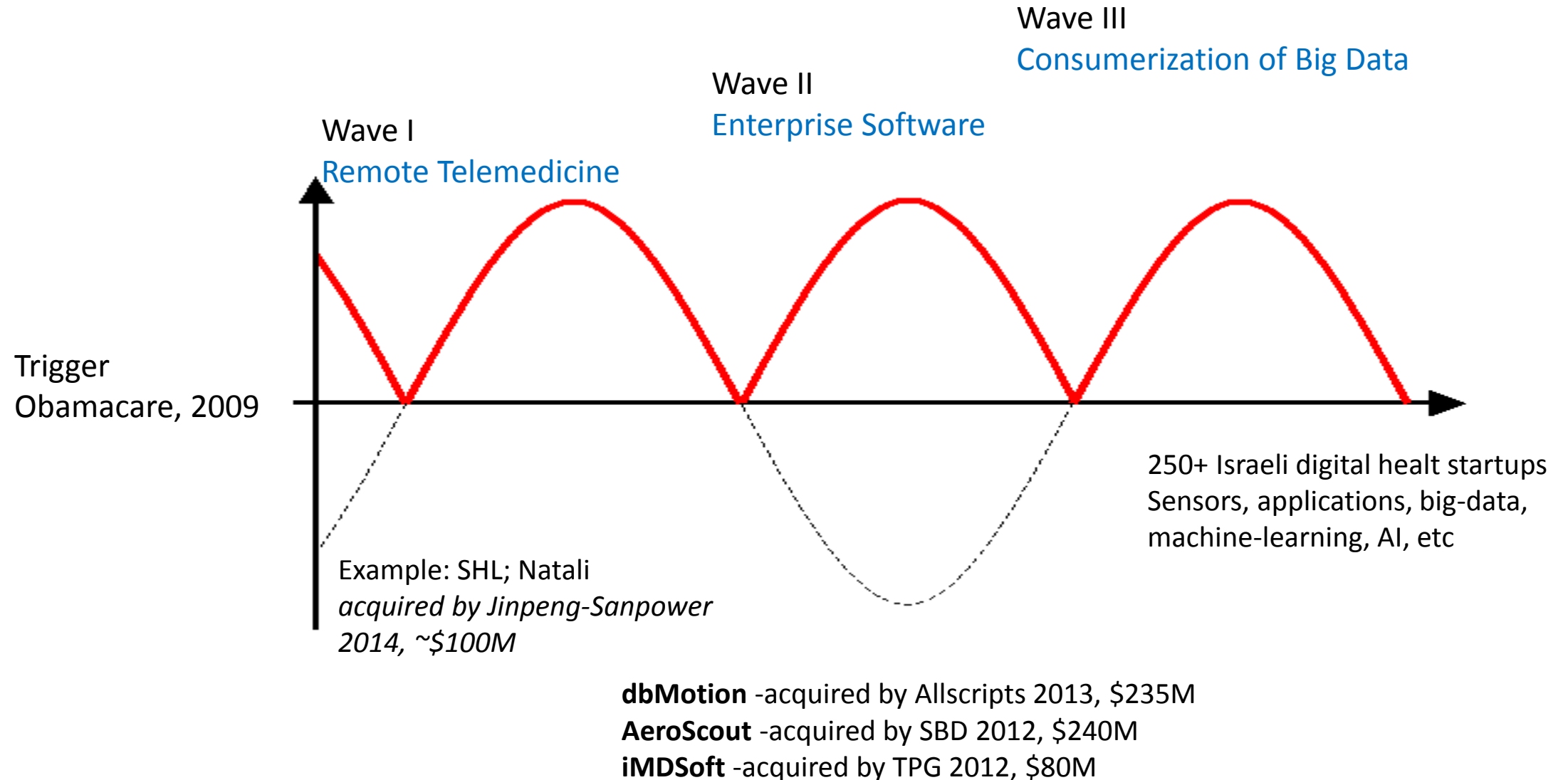


Monthly Meetups



Pavilion: HIMSS, Medica

Thesis: 3rd Wave of Digital Health Investment



Agenda

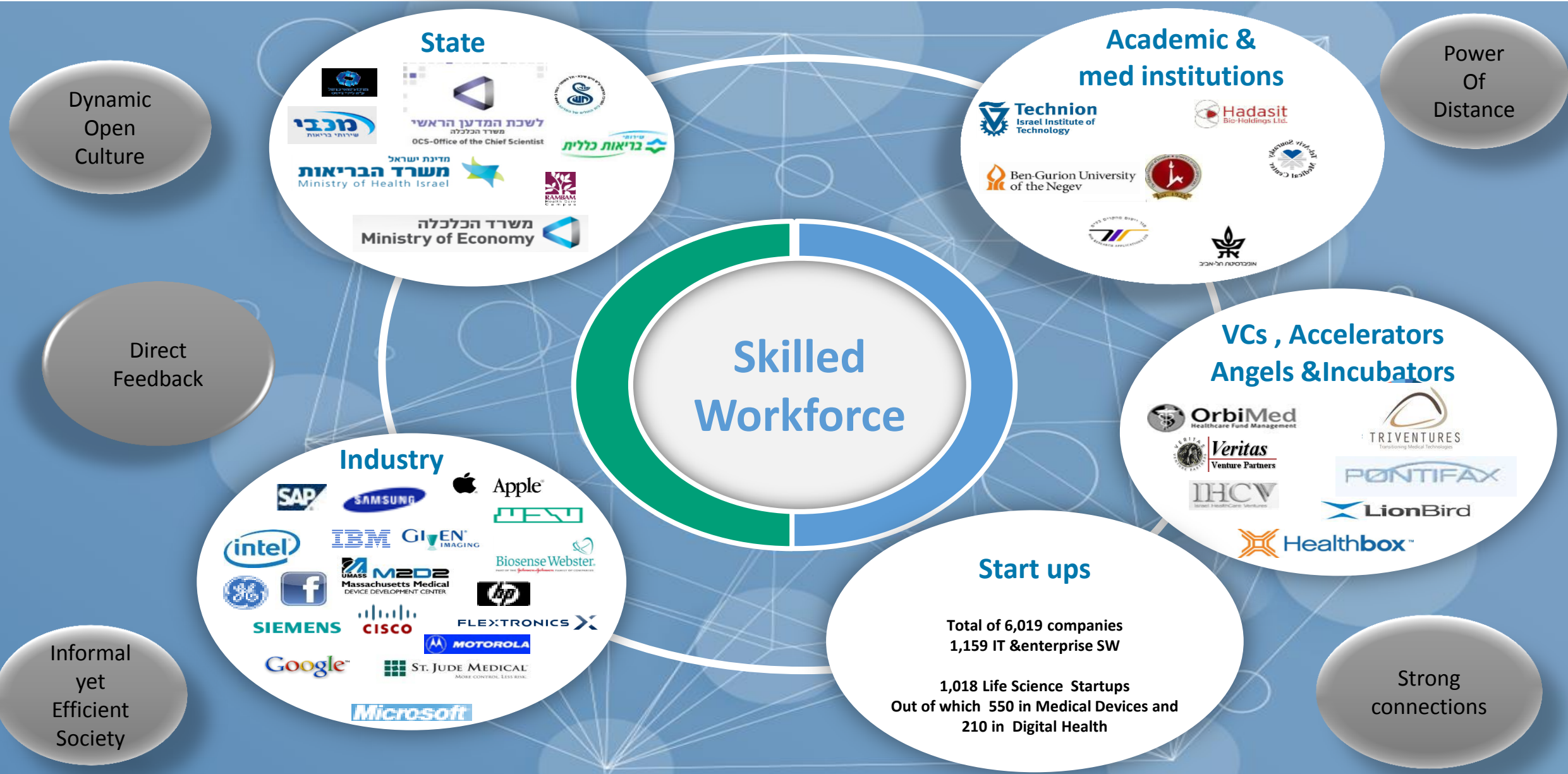
Investment Thesis

Israel- Venture Capital Background

Israel Health Sector

Israel Digital Health Investment

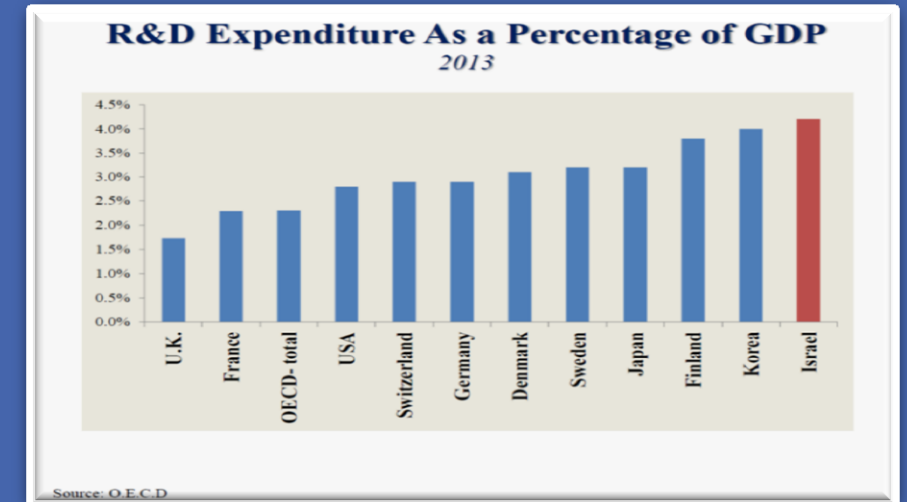
Factors Enabling Israel's Unique Healthcare Ecosystem



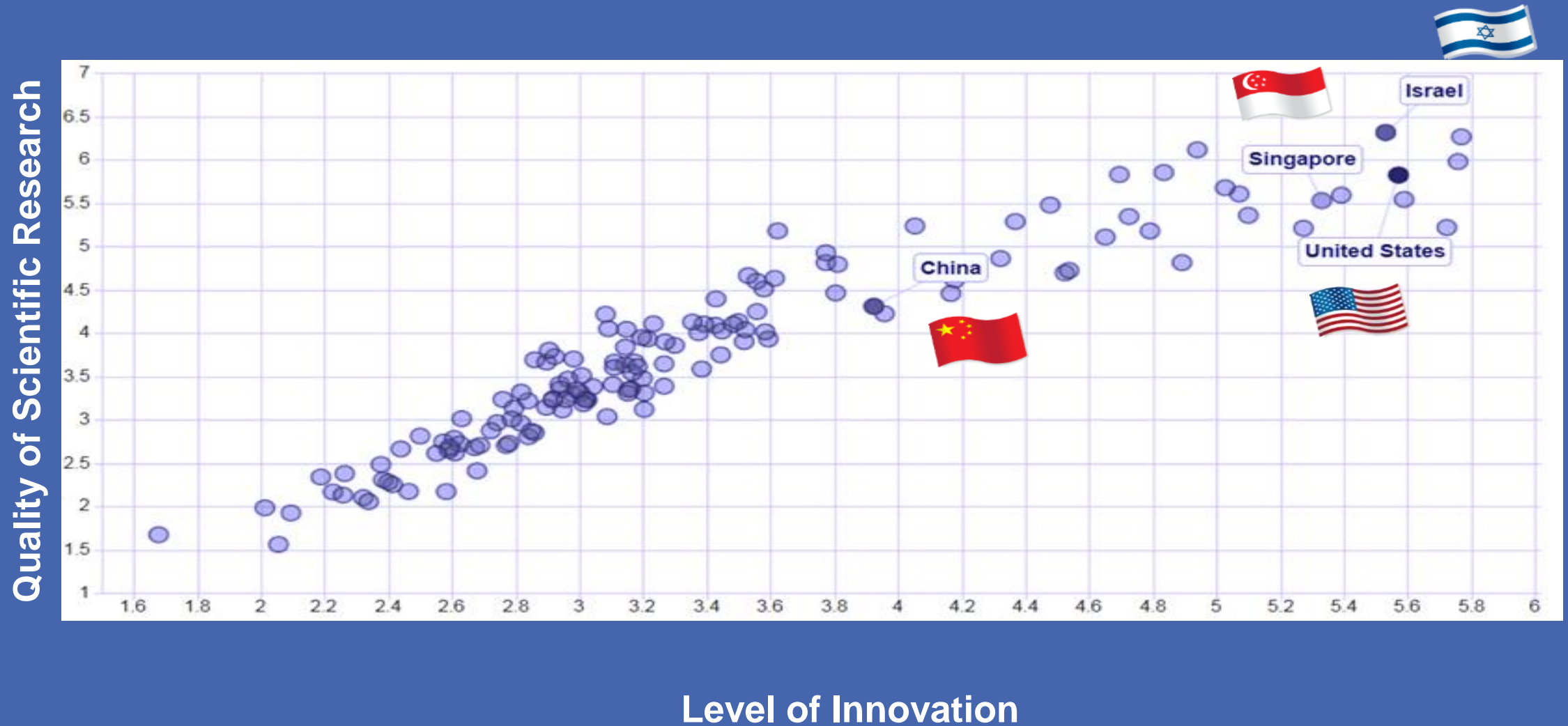
Building Block I: R&D Allocation

Population: 8 M NL: 17M, MA: 7 M
 GDP (nominal) per capita: 38K\$ NL: 52 K\$ IT: 35 K\$
 Unemployment rate: 5.9 % US: 5.8 % IT: 12.6 %
 Human Dev. Index (Life expt., school, GDP)
 #19 (out of 187) NL: #4, US #5, UK #14, IT #26)

Country Rank	1st	2nd	3rd	4th
Business expenditure on R&D	Israel	Korea	Japan	Finland
Total R&D Personnel in Business Per Capita	Israel	Taiwan	Luxemburg	Denmark
Total Expenditure on R&D	Korea	Israel	Finland	Sweden
Nobel Prizes Per Capita	Switzerland	Norway	Israel	Sweden
Funding for technological development	Finland	USA	Singapore	Israel
Development and application of technology	Finland	Singapore	Switzerland	Israel

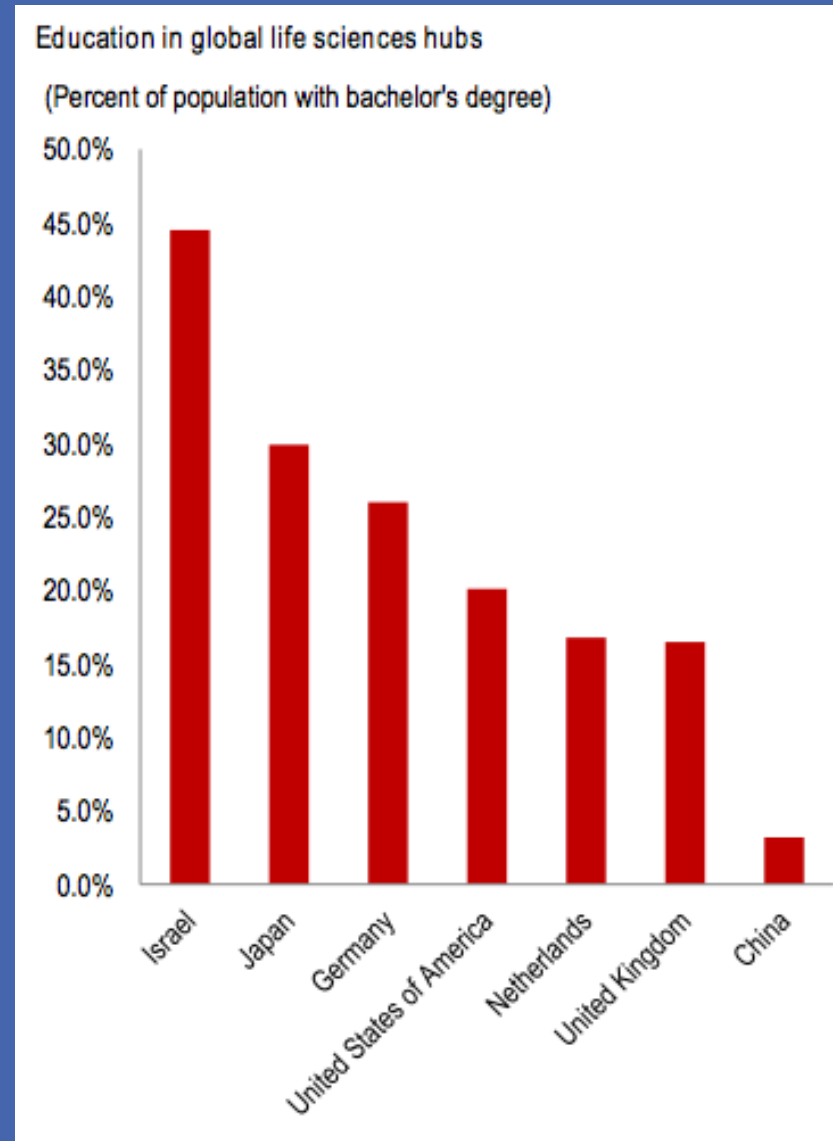


R&D Encourages Higher Quality Innovation



Building Block II: Skilled Workforce

Proportion of Population with Bachelors Degree Among Life Sciences Hubs



Building Block III: International R&D Centers Are a Lifeline for Local Tech Industry



Role of MNC's: Case Study- SAMSUNG



Agenda

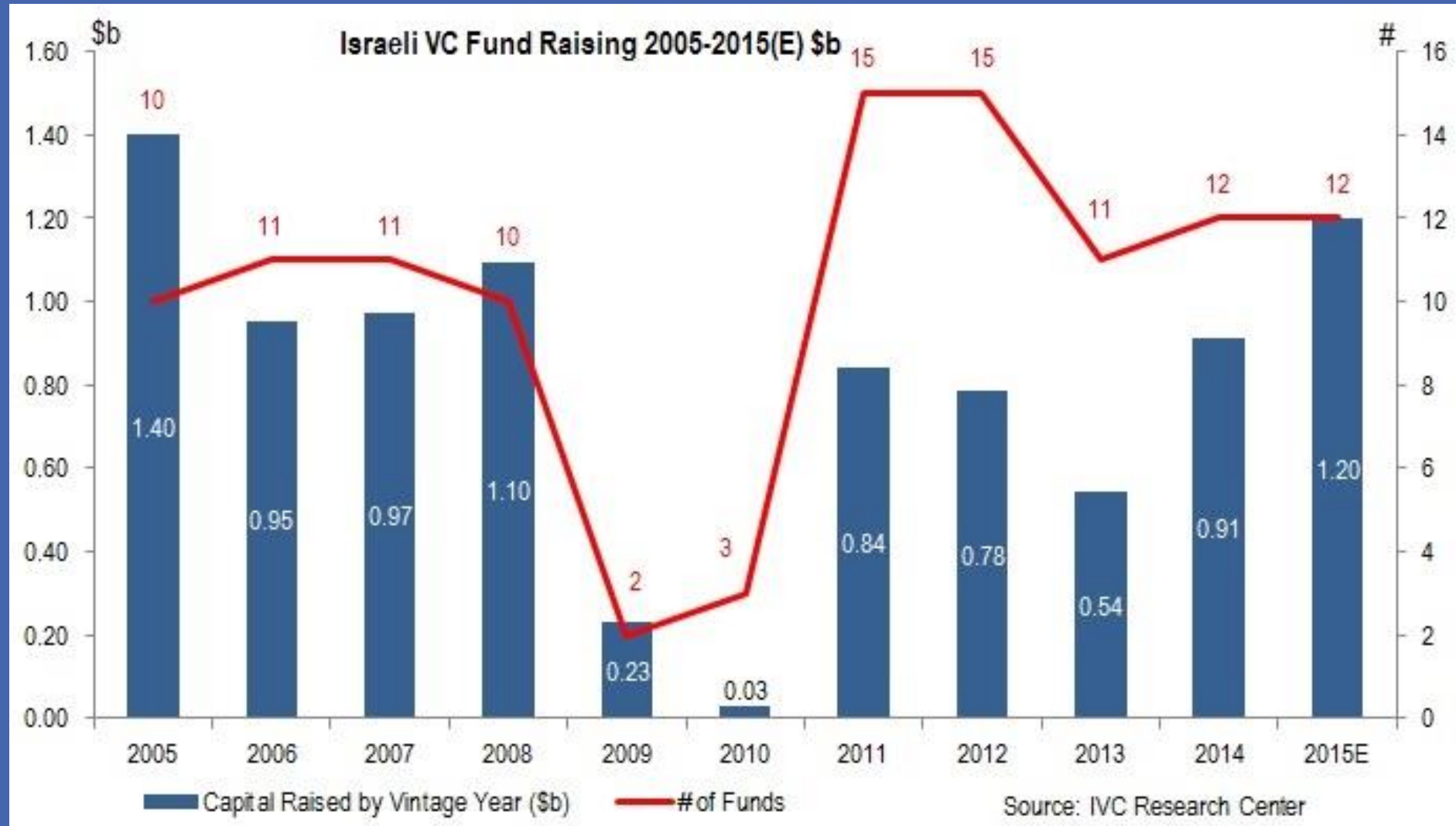
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Israeli VC Funds: More Money Flooding into the Market



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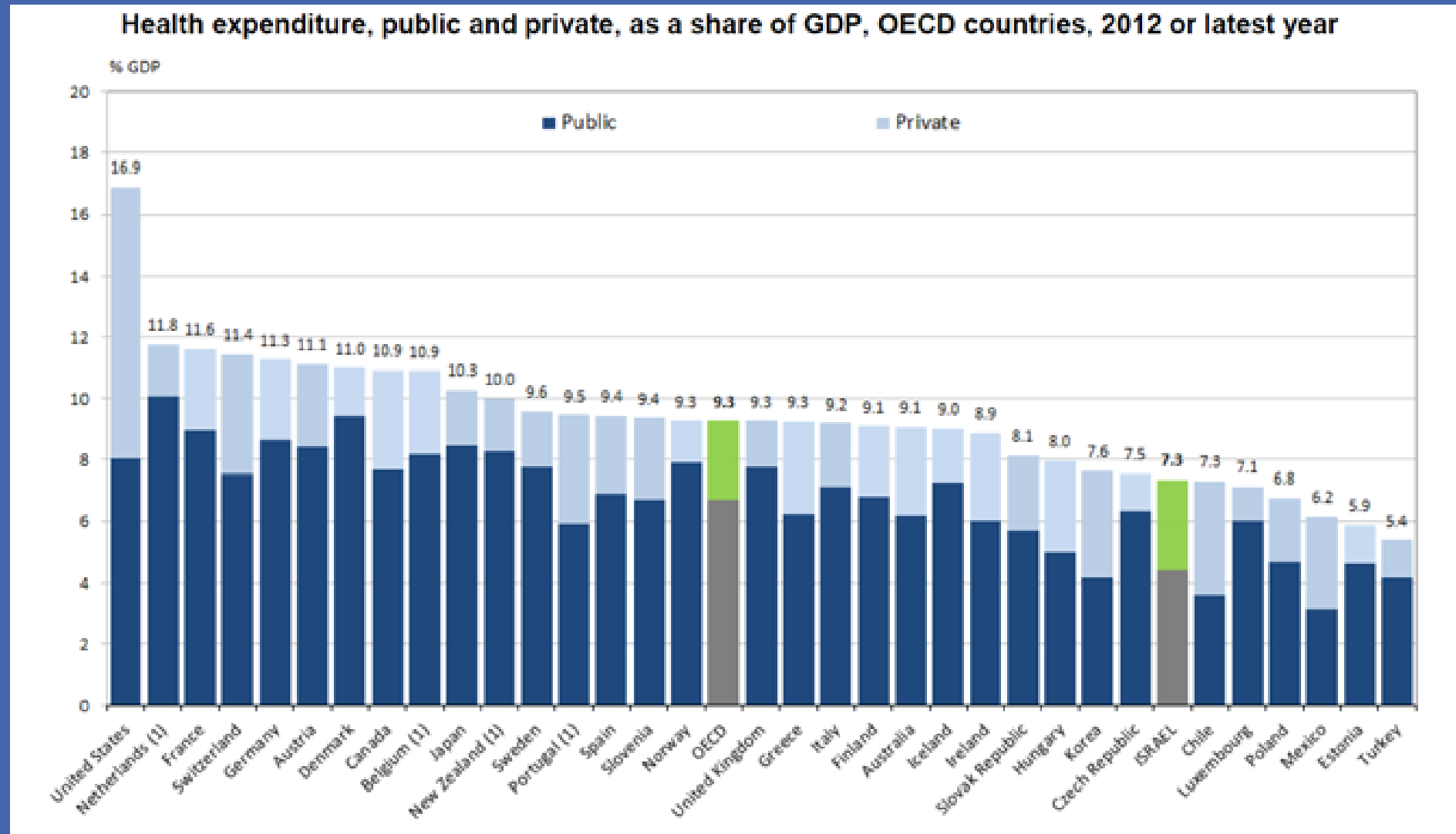
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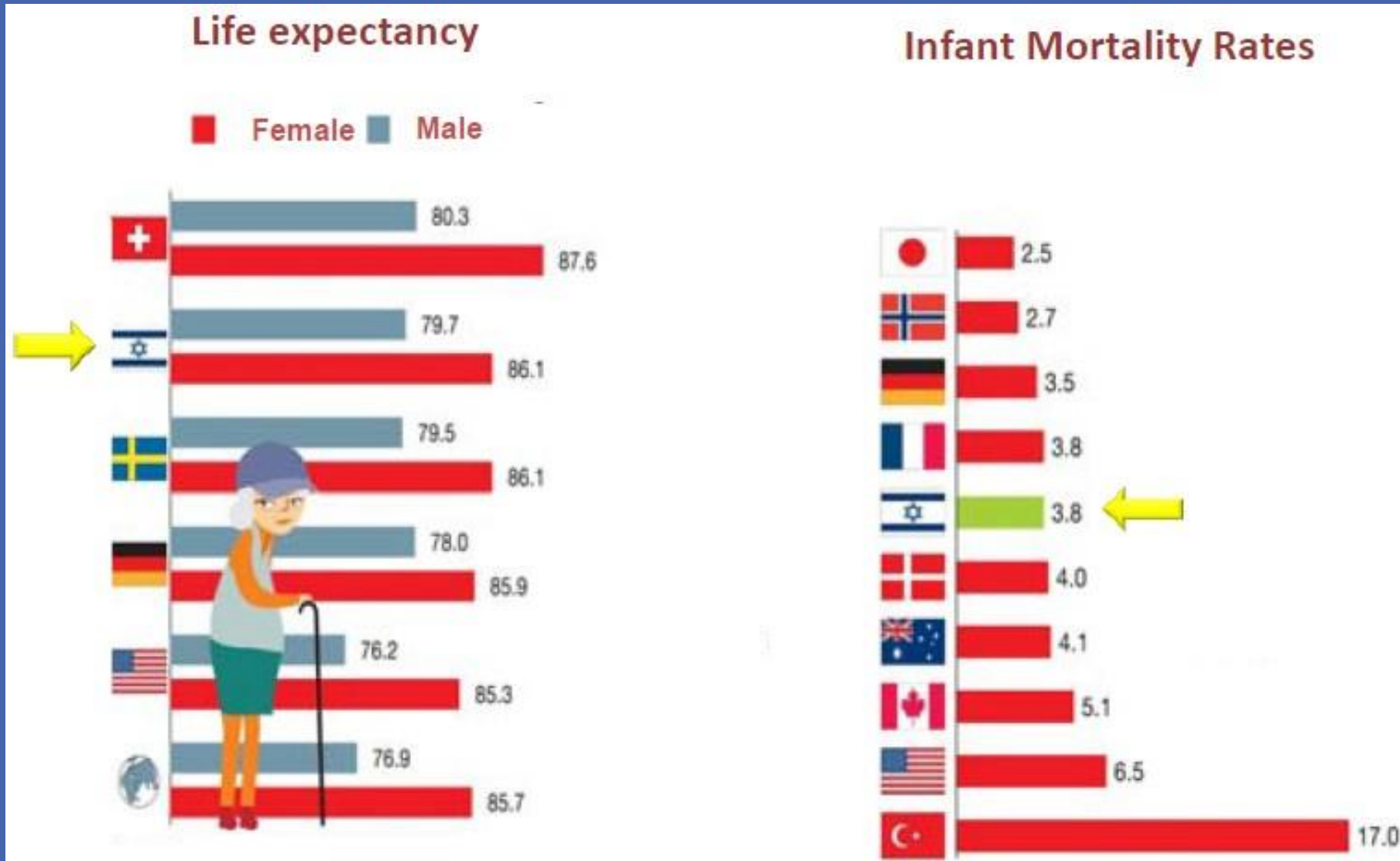
Israel Health Sector

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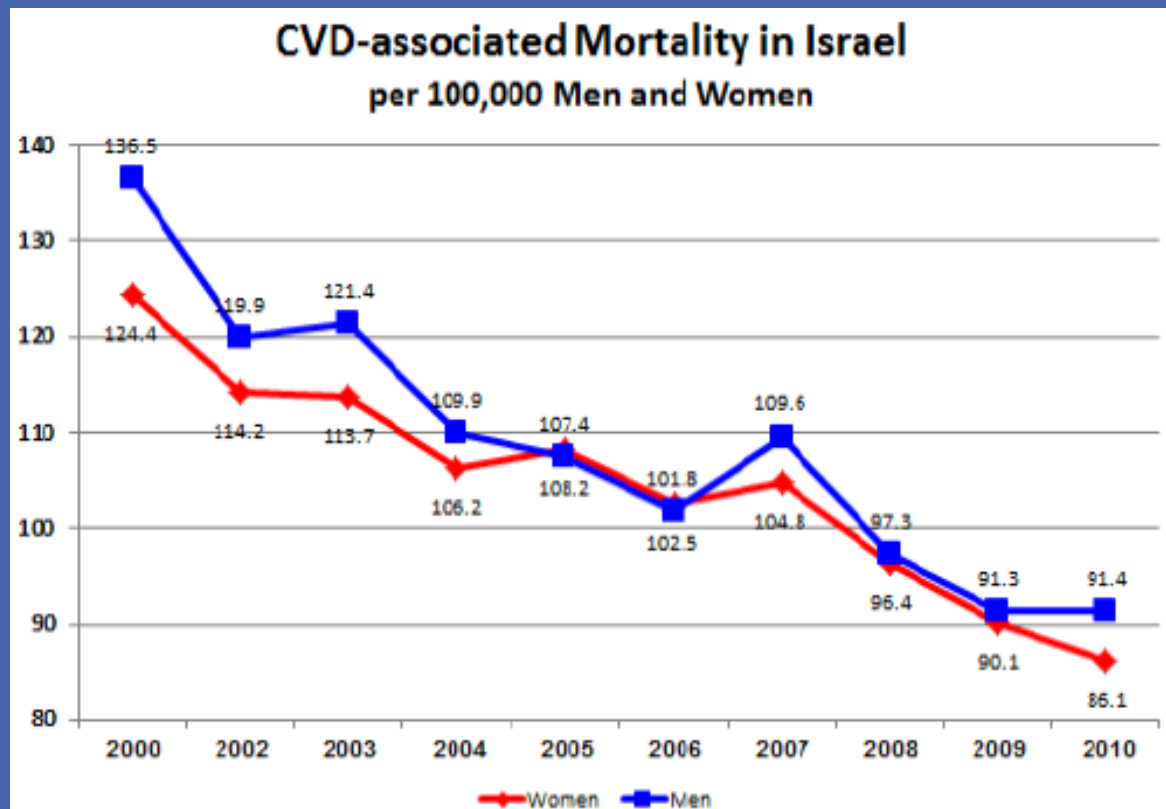
GDP Allocation: 7.5% VS 18% of GDP



Health in Israel: Relatively Good Outcomes

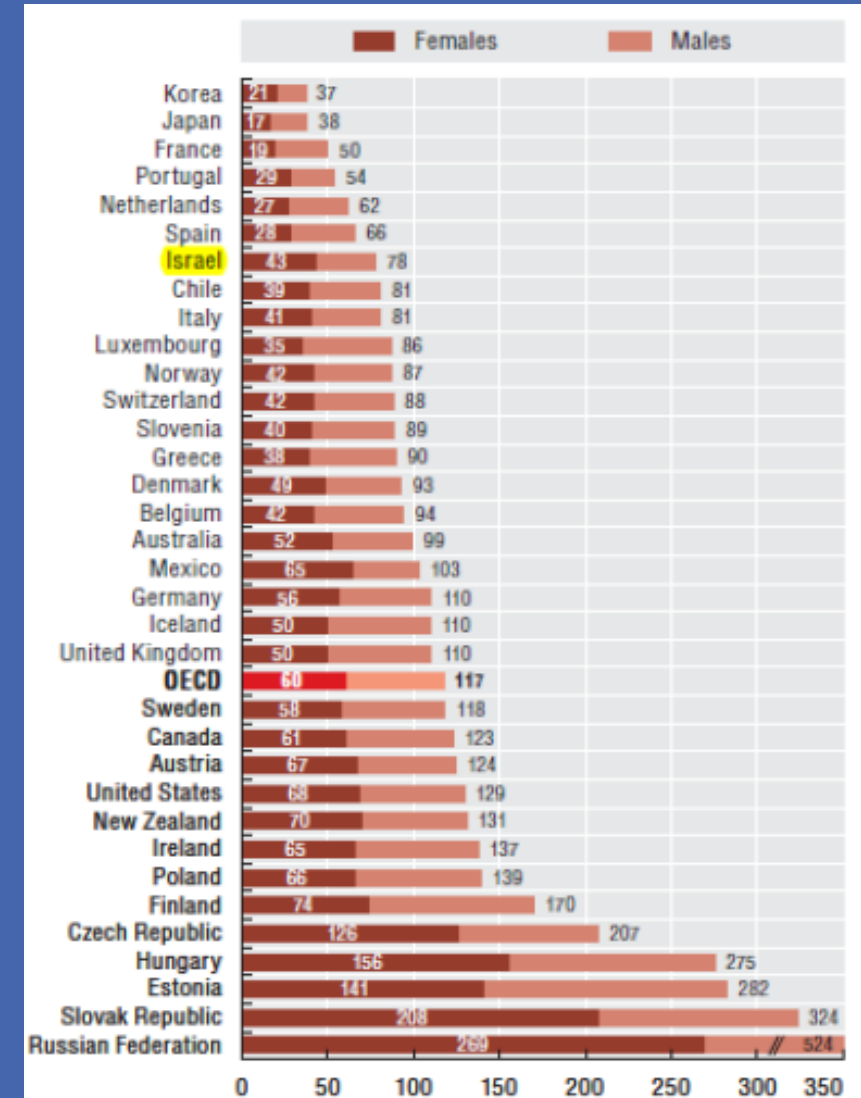


CVD Mortality in Israel



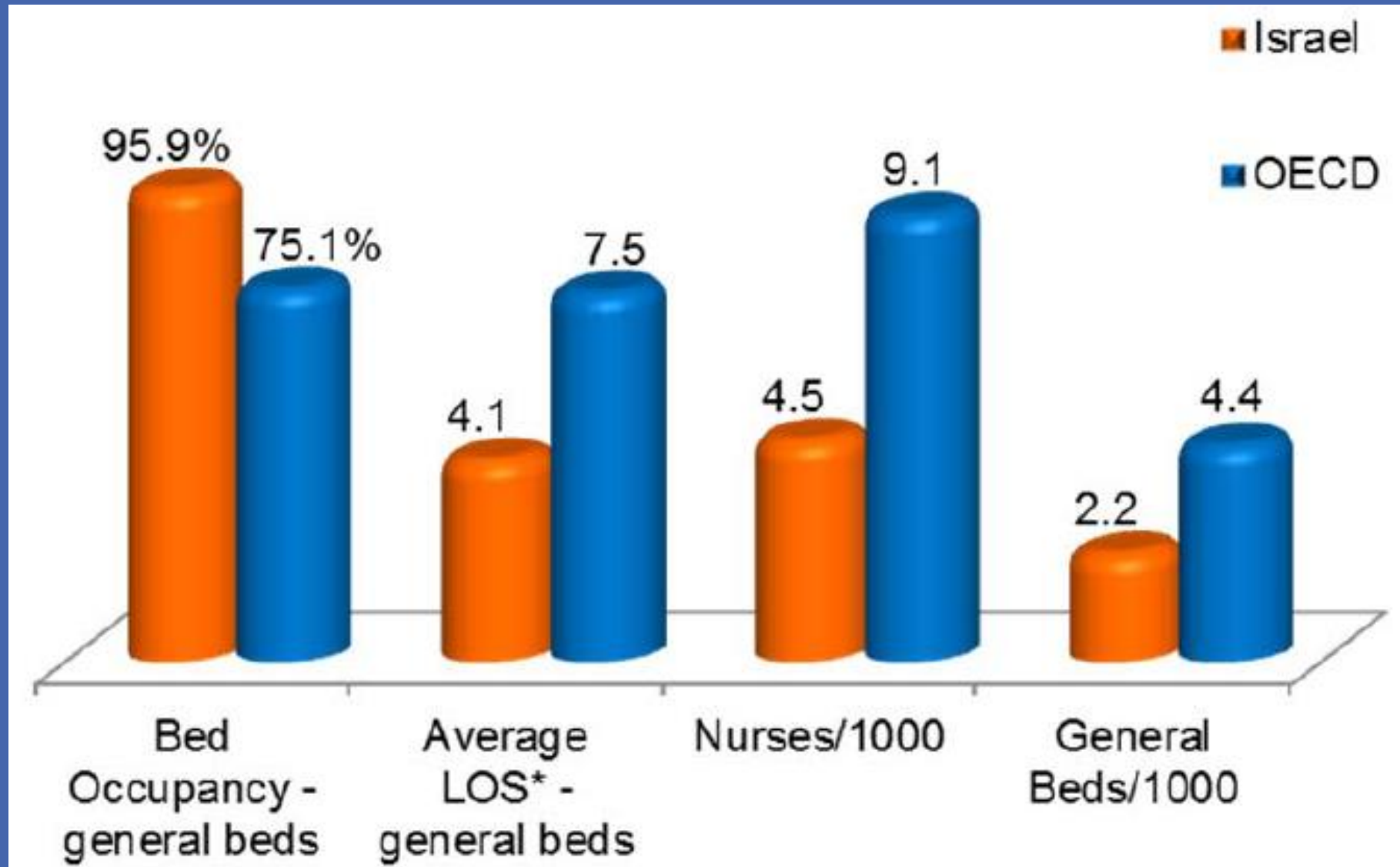
Israel Ministry of Health, 2013

Ischemic Heart Disease, Mortality Rates



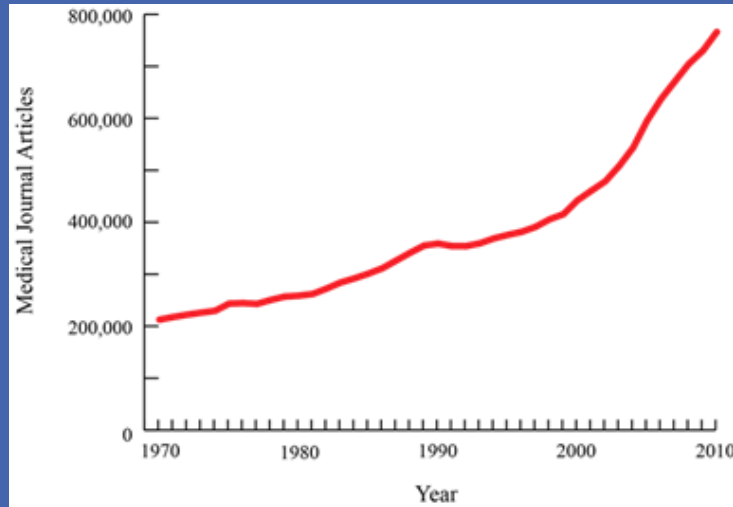
OECD, 2011

Comparatively Efficient Health System Optimization



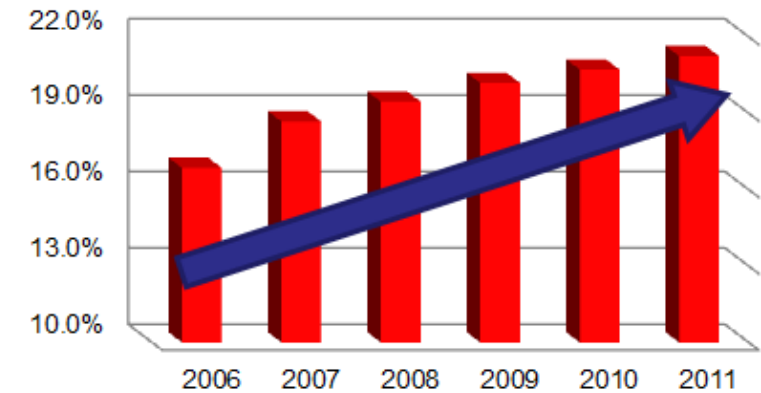
Factors That Drove Israel Toward Prioritizing Digital Healthcare Adoption

Complexity

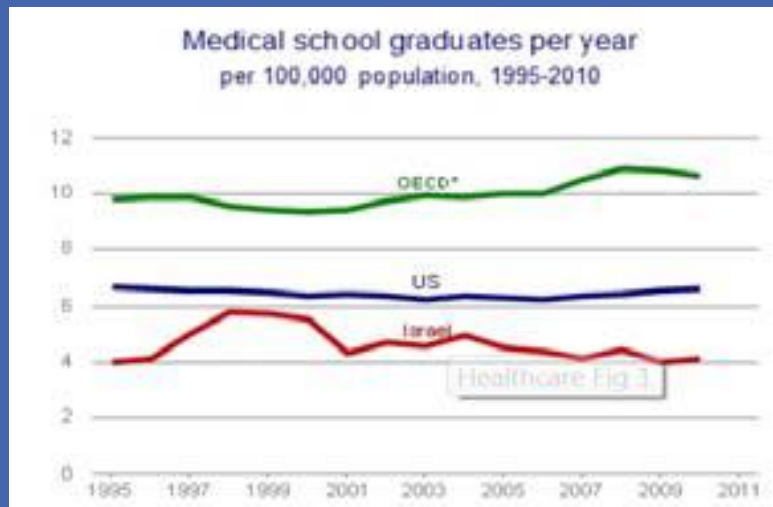


Multi-Morbidity

Age 65+, **5+** NCDs

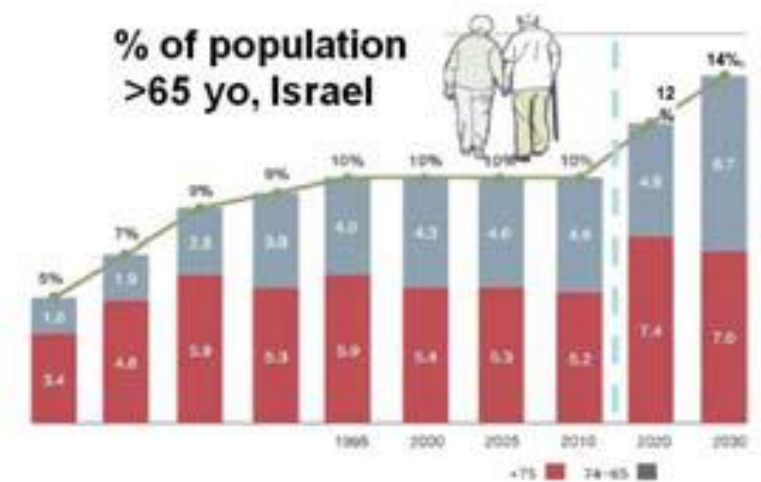


Resources Shortage

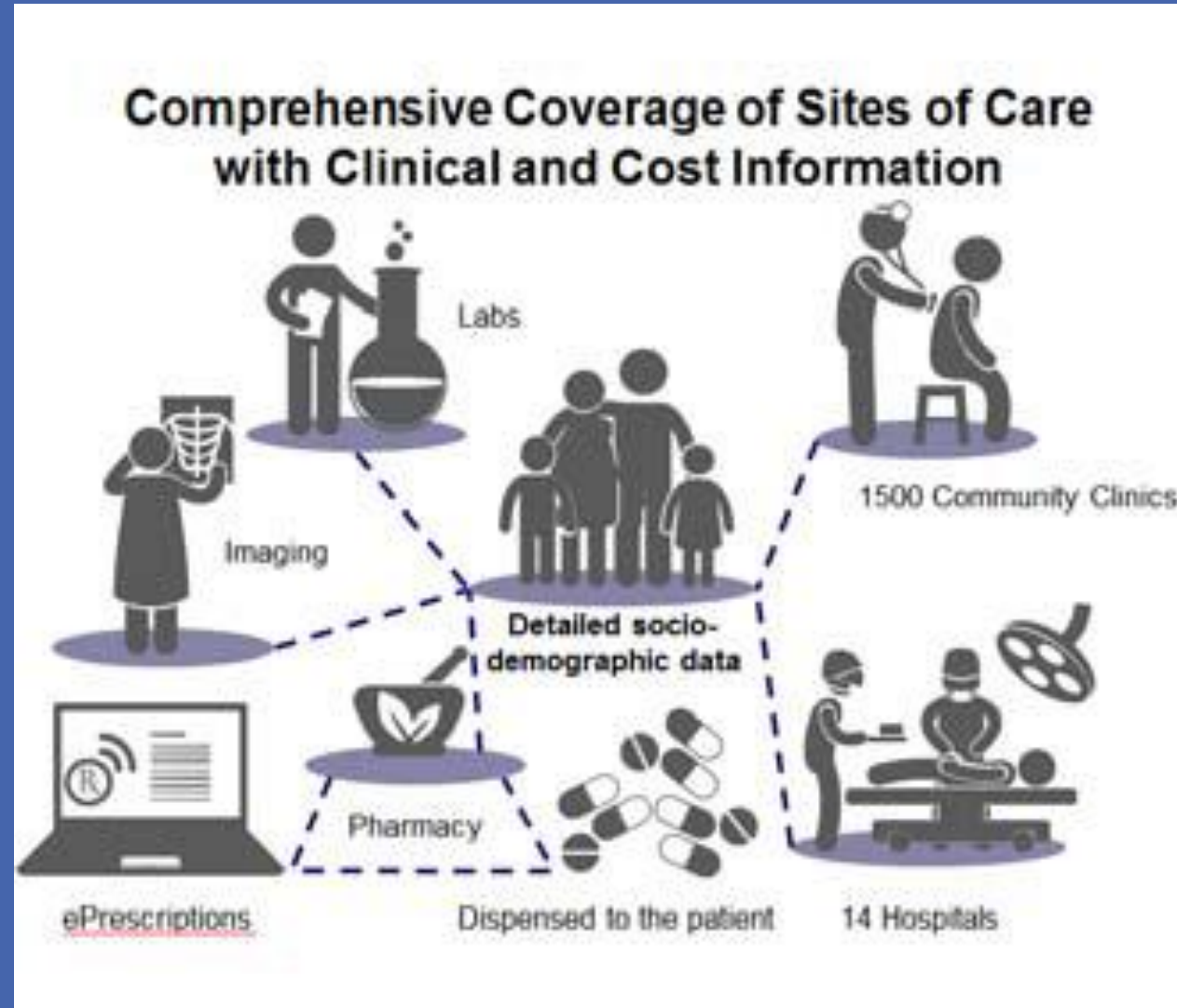


Aging

% of population >65 yo, Israel



HMOs bring 24 YEARS of universal, longitudinal EMR data that startups can access



Example from Clalit, largest HMO with 54% market share

International Recognition: OECD



“ Israel’s **community-focused information system** sets an international benchmark in excellence and demonstrates commitment to quality monitoring and improvement. ”

Agenda

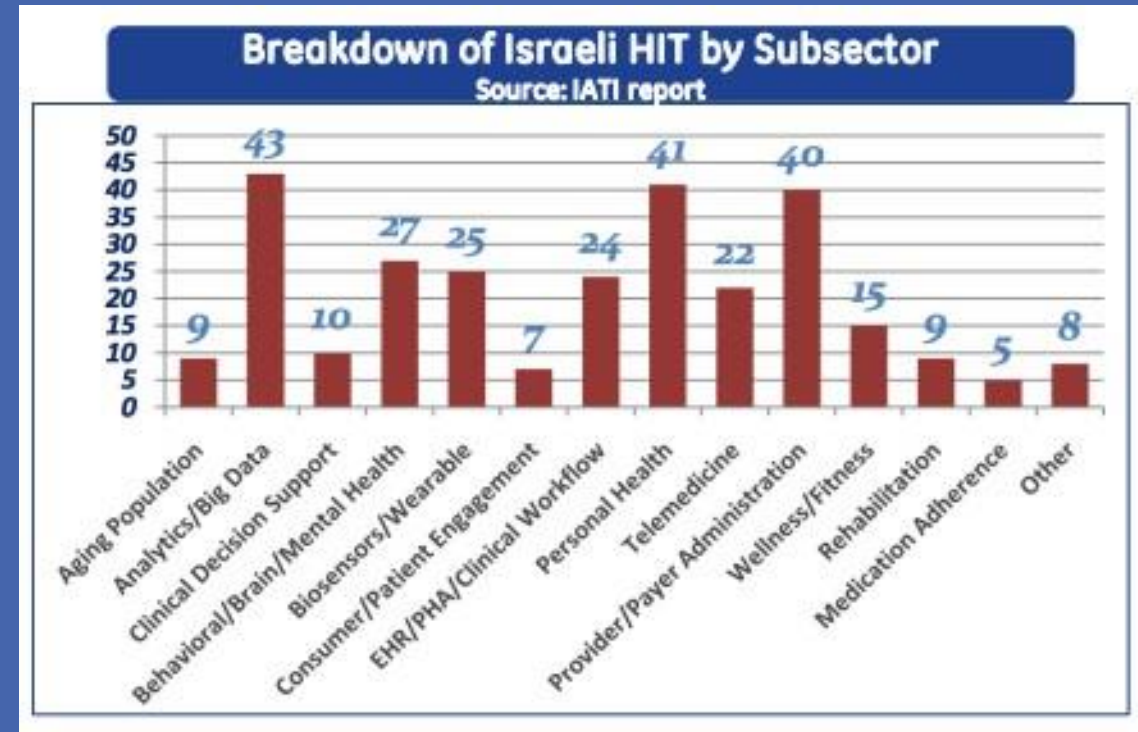
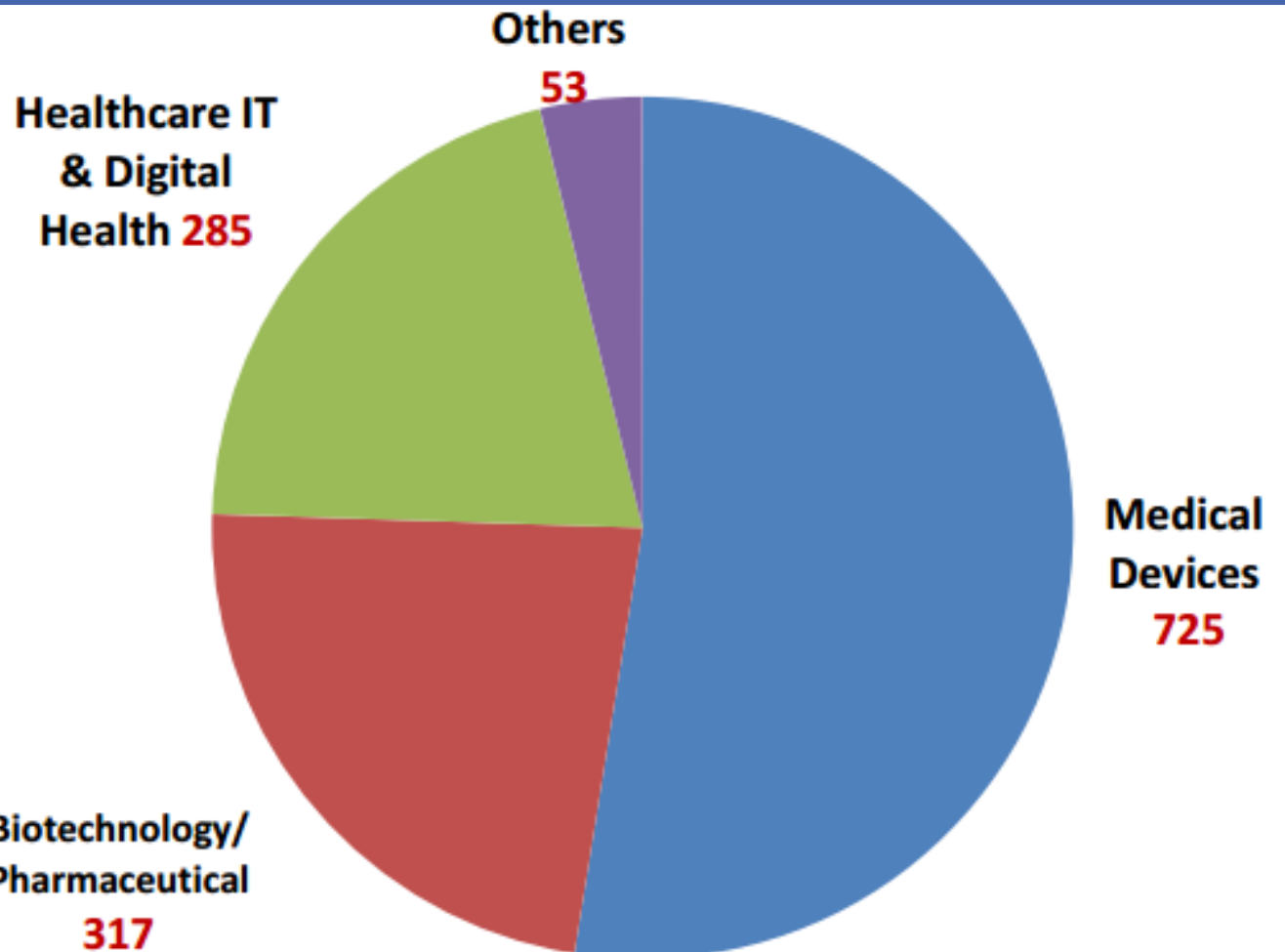
Investment Thesis

Israel Venture Industry

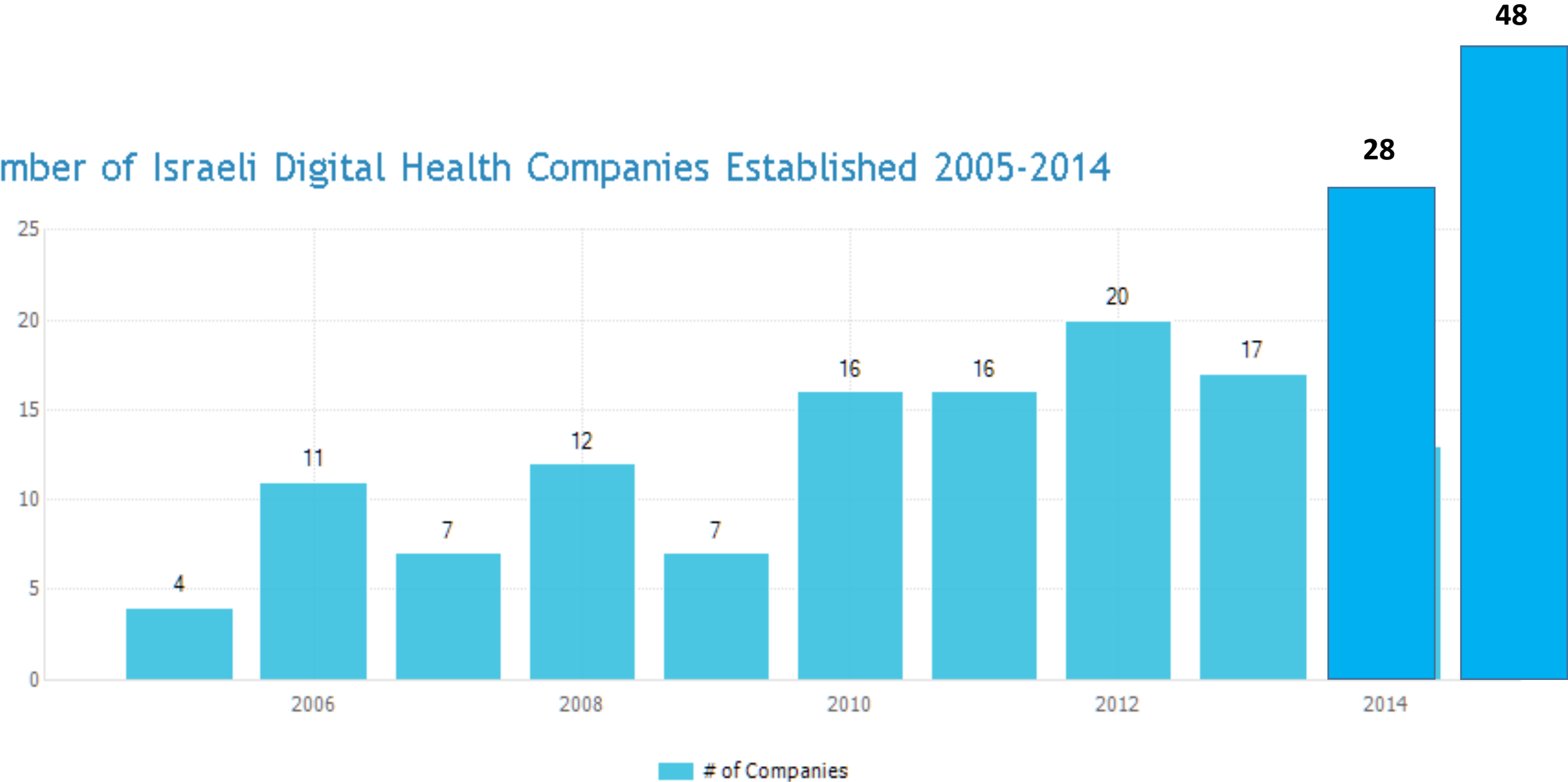
Israel Health Sector

Israel Digital Health Investment

Israel Life Sciences Industry by Sub-Sectors

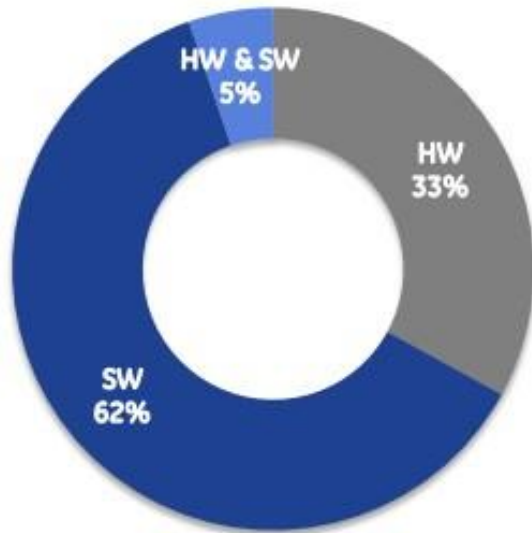


Number of Israeli Digital Health Companies Established 2005-2014

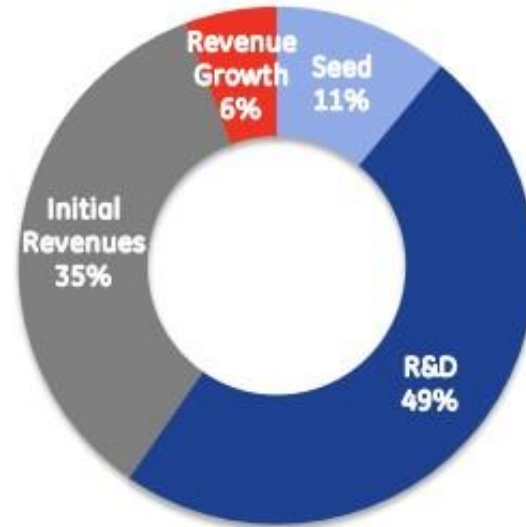


mHealth Israel Database Breakouts

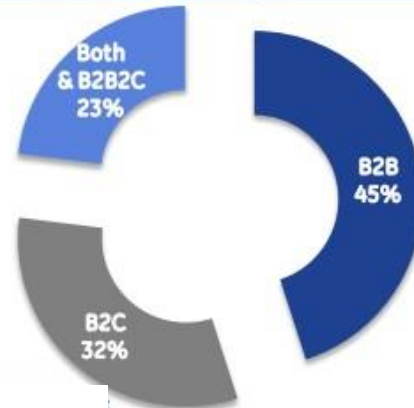
Hardware vs. Software



Breakdown by Stage



Breakdown by Model



Medivizor: “Health Information – Personalized”



Improve the lives of people with serious or chronic medical conditions and of those who care for them.

Effectively apply software and the social web to the field of health for the betterment of humanity.

<https://medivizor.com/>
<http://bit.ly/1RSv3uf>
<http://bit.ly/1mTipOR>
<http://bit.ly/1mTipOR>

Medivizor: Personalized Healthcare



Henry

57 year old
Caucasian
Prostate Cancer

Untreated.
Early-stage.
Low-grade
adenocarcinoma



John

57 year old
Caucasians
Prostate cancer

Not responding well to
first line treatment
Prostatectomy
Cancer has metastasized

A 3-Tier Approach to Personalizing Information



Understandable, relevant, trustworthy and proactive personal information gathering

MOBILE ODT: “Using A Smartphone To Detect Cancer”



<https://www.mobileodt.com/>

Cervical Cancer Worldwide



Visual Assessment of the Cervix



MobileODT's EVA

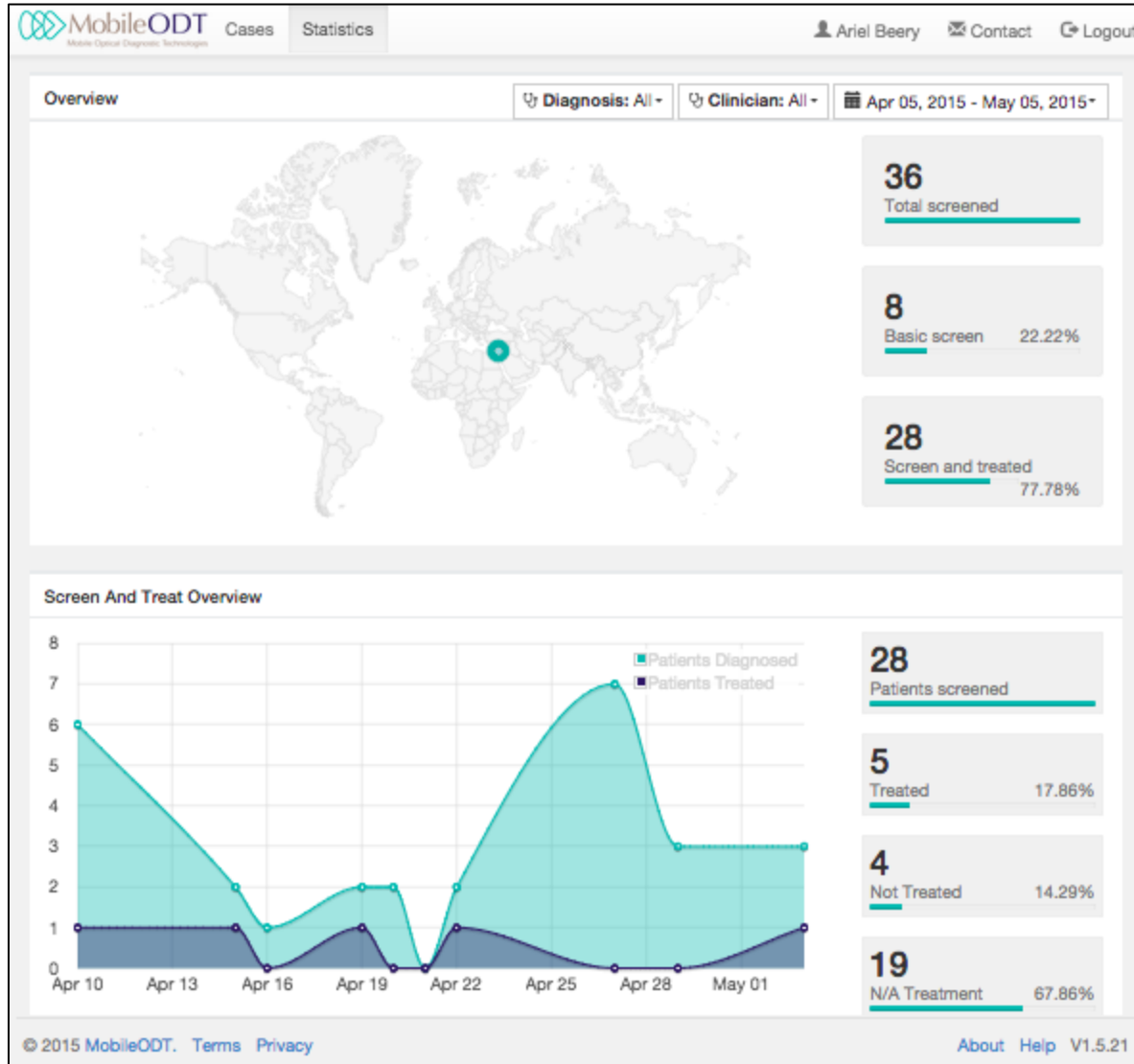
\$1,500



Today's Colposcope

\$15,000

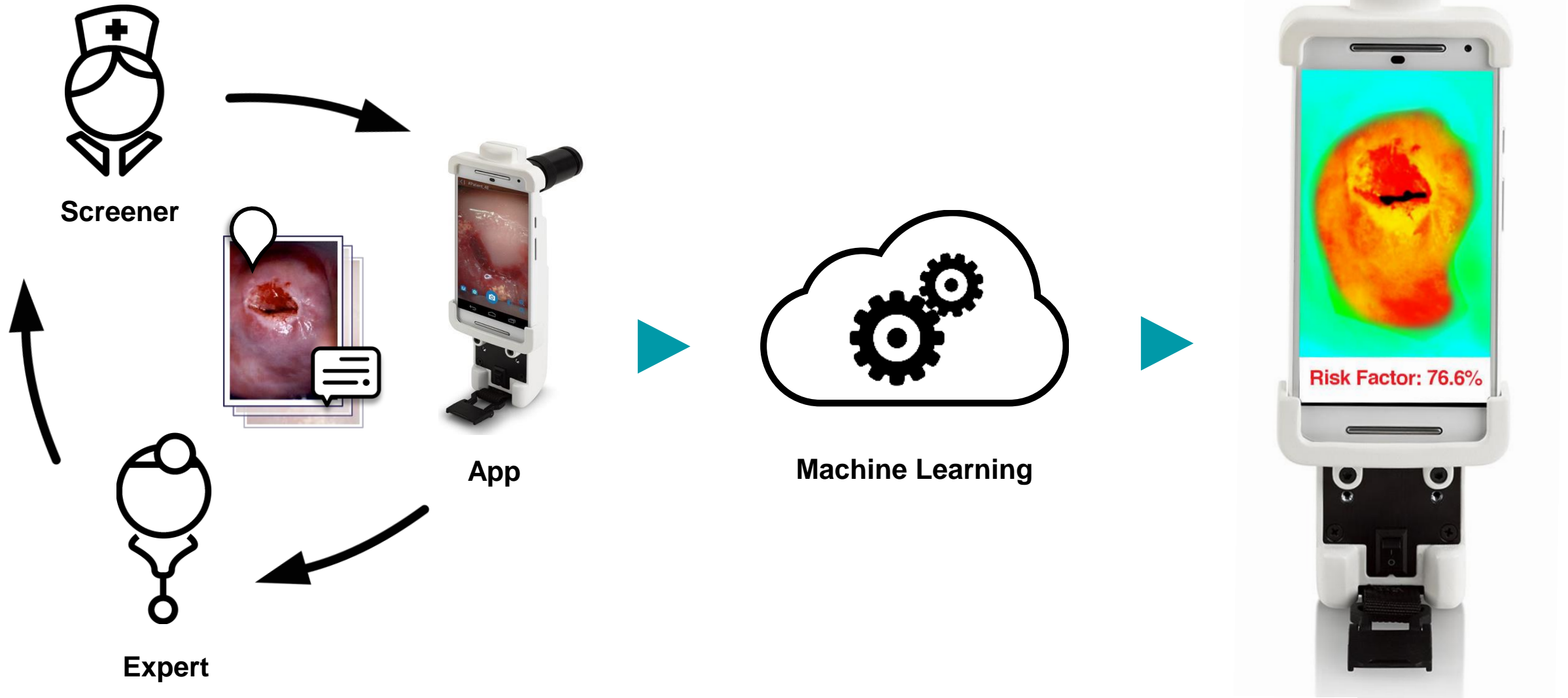
Online Monitoring and Evaluation



The screenshot displays the MobileODT Treatment Overview form. At the top, there is a 'Treatment Overview' header. Below it is a 'Treatment info' section. On the left, there is a large clinical image of a patient's eye. To the right of the image, there is a form with the following fields: 'Date: Jan 13, 2015', 'Location: Phologolo Extension 9, Gaborone, Botswana', 'Clinician Name: Demo User', 'Clinical Decision: Treated', and 'Diagnosis Summary: (view all or select a Clinician to filter annotations.)'. Below these fields, there are two radio button options: 'Normal or Benign' (selected) and 'Low grade (CIN I)'. There are also two checkboxes: 'High grade (CIN II/III)' and 'Cancer or Invasive'. Below the radio buttons, there is a 'Notes' section with two entries: 'Demo User: Done diagnosis as TREAT Jan 13, 2015 15:33' and 'Demo User: Patient should be send to Qx Feb 19, 2015 09:43'. At the bottom, there is a 'Save note' button.

- Case review and oversight
- Aggregated data on clinicians, procedures, treatment rates
- Drilldown to focus on local, regional, national, or international levels

The Network Effect



VoiciTT



capturing the colors in your voice



created by 

1.5% of the world's population cannot communicate naturally using their voices.



That's **over 100 million people.**

People with a **wide range of disabilities** need help to use their voice to communicate.

People affected by:

**Autism
Brain Injuries
Parkinson's**

**Cerebral Palsy
Alzheimer's
Multiple Sclerosis
Stroke**

**ALS
Hearing Disability
Throat Cancer**

Talkitt improves people's lives.



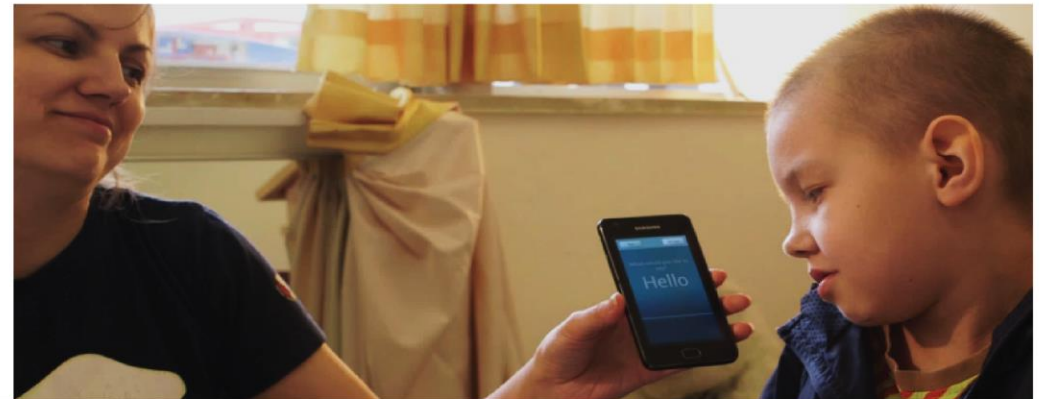
PARTICIPATE IN SCHOOL



HAVE A CUP OF COFFEE



COMMUNICATE WITH FAMILY



<https://vimeo.com/98136263>