



“Today...we have a chance
to become the premier region
in the country for innovation...”

Duane Roth, CEO, CONNECT
The New York Times; September 2008

2008 ANNUAL REPORT

This year:

1,200 volunteers helped
more than 1,000 companies

300 events attracted
10,000 registrations

Springboard graduates
raised nearly \$100M

26 programs delivered
coaching, financing,
education, recognition,
networking, cluster
acceleration and advocacy

Launched CleanTECH
San Diego trade
organization

INNOVATION

INVESTMENT

INSPIRATION

RECOGNITION

LEADERSHIP

INTEGRITY

IMPACT

VISION

PROGRESS

PERFORMANCE

EMPOWERMENT

GROWTH

RESPONSIBILITY

SUCCESS

RESULTS

orig



By any measure, the San Diego innovation economy is today one of the best anywhere.

We are home to the densest clusters, in the world, of wireless and biomedical companies and have significant clusters in software, clean tech, unmanned systems, cyber technologies and action and sports companies.



MESSAGE FROM THE CEO
By Duane Roth,
Chief Executive Officer

Twenty years ago, San Diego was in serious trouble due to simultaneous challenges in several key sectors of the local economy. Major cuts were underway in defense spending as a result of the thawing of the Cold War. Savings and loans banks, many of which were based in San Diego, were over-extended in their loan portfolios and were downsizing. Light manufacturing companies were consolidating in the face of stiff global competition.

In 1985, University of California, San Diego (UCSD) Chancellor Richard Atkinson and Daniel Pegg, Chairman of the San Diego Regional Economic Development Corporation (EDC), invited a few community leaders to discuss how San Diego could prepare to participate in the “knowledge economy.” Included in the meeting were the founder of QUALCOMM, Inc., Irwin Jacobs, David Hale, at that time CEO of Hybritech, Buzz Woolley of Girard Capital, and Bob Weaver of Deloitte.

With the support of these business leaders, Atkinson asked Dr. Mary Walshok, Dean of UCSD Extension, to organize a program to educate the San Diego community on entrepreneurship and starting new technology-based companies. This initiative led to the establishment of CONNECT as a regional non-profit organization with member support from the research community, the private sector and government. CONNECT’s purpose was to educate the San Diego region on how to commercialize local research-based discoveries.

To lead the implementation of this initiative, the advisory board and founders hired Bill Otterson as the Executive Director. Through their support and his exceptional leadership, CONNECT grew into one of the most successful organizations of its kind in the world. Today, the Otterson legacy is the well-known San Diego “culture of collaboration” that he initiated as a way to quickly spread expertise in the region.

WHY DID OUR REGION MOVE SO FAR, SO FAST?

It begins with excellent research capacity in the region. Approximately 50 institutions attract in excess of a billion dollars in funding each year. Due to San Diego’s desirable quality of life, the region attracts some of the best and brightest researchers and they in turn attract funding, which leads to

more discoveries with commercial potential. The quality of life also attracts entrepreneurs to the region. Thanks to our great teaching institutes like UCSD, San Diego State University (SDSU), California State San Marcos, University of San Diego (USD) and our community colleges, we have a talented and well-trained work force. Finally, these assets attract capital investment. While many locations throughout the world have similar assets, San Diego’s culture of collaboration (sharing, partnering, supporting) has set us apart.

As clusters of innovative companies have emerged in San Diego, industry-specific trade organizations have been launched to offer assistance to the start-up companies as they mature. Today these include BIOCUM, CommNexus, AeA San Diego Council, the San Diego Software Industry Council and CleanTECH San Diego. Another future trade association is now incubating at CONNECT called Action and Sports Innovators (ASI).

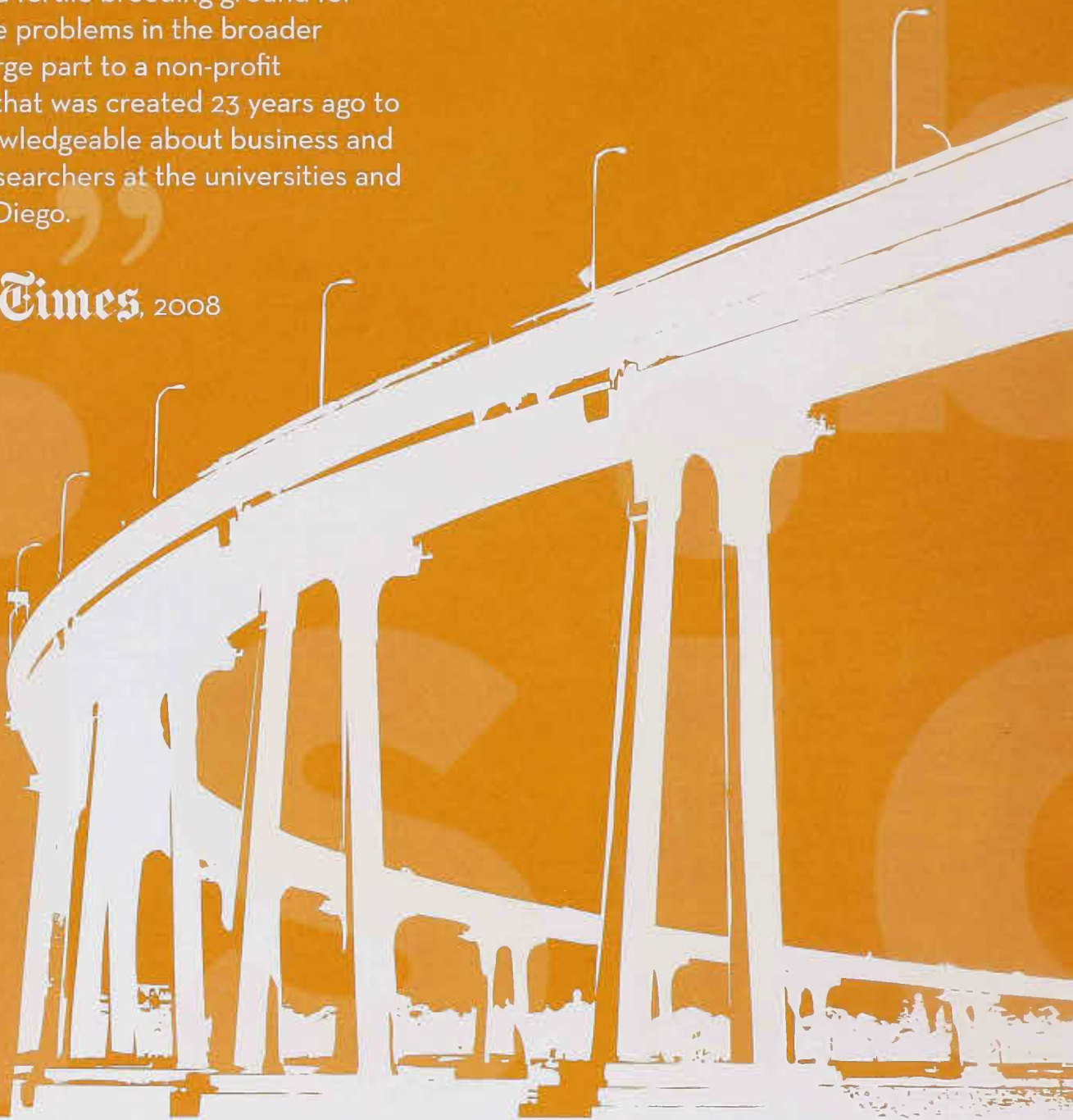
Our future success in the innovation economy will be derived from the significant asset base that we have leveraged and grown over the past 25 years, including the research institutions, a talented workforce and investment capital, all wrapped inside our collaborative culture. We will need all of these and more as we prepare for the next 25 years in an increasingly competitive global innovation economy.

I would offer a few key objectives for our regional innovation economy as fundamental to future competitiveness:

- research institutions are the engines of discovery and we should unite to recruit and retain the most talented researchers anywhere and offer support for increased federal funding of basic research;
- intellectual property is our primary asset and we should be diligent about protecting our discoveries around the world;
- the global economy requires ever increasing partnerships to remain competitive and as a region we should reach out nationally and internationally and share our contacts;

“So far, San Diego remains a fertile breeding ground for entrepreneurs, despite the problems in the broader economy. That is due in large part to a non-profit organization, CONNECT, that was created 23 years ago to bring together people knowledgeable about business and investment capital with researchers at the universities and research institutes in San Diego.”

The New York Times, 2008



- communication between academic leaders and the private sector will be even more essential to the innovation economy and we should develop ways to continue to improve;
- risk capital is the fuel of innovation and we must develop new and sustainable models to fund innovation; and
- recruitment of talented entrepreneurial leaders and creative scientists and engineers is essential and we need to develop tools to ensure we remain competitive.

If one evaluates these goals, it becomes apparent that public policy in Washington and Sacramento holds many of the keys to our future success. Federal support of research is the lifeblood of the new idea generation. Intellectual property laws, trade policy and regulation are set largely by Washington policy makers and these policies will determine much of our global competitiveness. Workforce and education are both federal and state governed. As a region, we must become more engaged with our legislators and CONNECT is committed to improving communication with our Washington and Sacramento legislators.

CONNECT operates at the nexus of the regional innovation economy.

We connect research institutions, angel, venture and institutional capital providers, R&D and business development arms of corporations, leading professional services providers and trade organizations together to accelerate the commercialization of innovation. As the economy experiences a very difficult time, we should remember that there remain many unmet needs and opportunities such as healthcare, communications, environment and security. Our region is well-positioned to deliver solutions and we should do all we can to make them a reality.

CONNECT's board of directors – leaders in the technology sector – have initiated major strategic initiatives to support:

- research excellence and commercialization of innovation;
- the research and technology communities in the recruiting and retention of talent; and
- more effective matchmaking of early- and growth-stage innovation with grants, seed, angel and early-stage capital sources.

In addition, we have rolled out new cluster initiatives to facilitate the further growth and success of additional areas of strength in San Diego, including clean technology, action and sports innovation, unmanned

CONNECT FOUNDERS

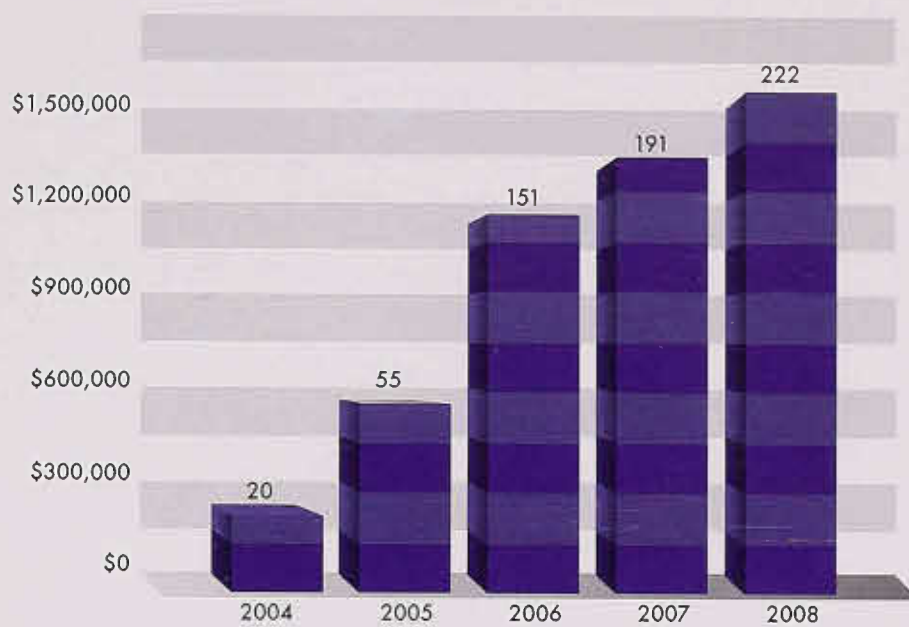


Left to right: *Irwin Jacobs - Chairman, QUALCOMM; Richard Atkinson - President Emeritus, University of California (and former Chancellor, UCSD); Lea Rudee - Founding Dean UCSD School of Engineering; Mary Walshok - Associate Vice Chancellor, Public Programs and Dean, UCSD Extension; Buzz Woolley - President, Girard Capital/Girard Foundation; David Hale - Chairman, Hale BioPharma Ventures LLC (Chair, CONNECT Board); Dan Pegg - Former President & CEO, San Diego Regional Economic Development Corporation*

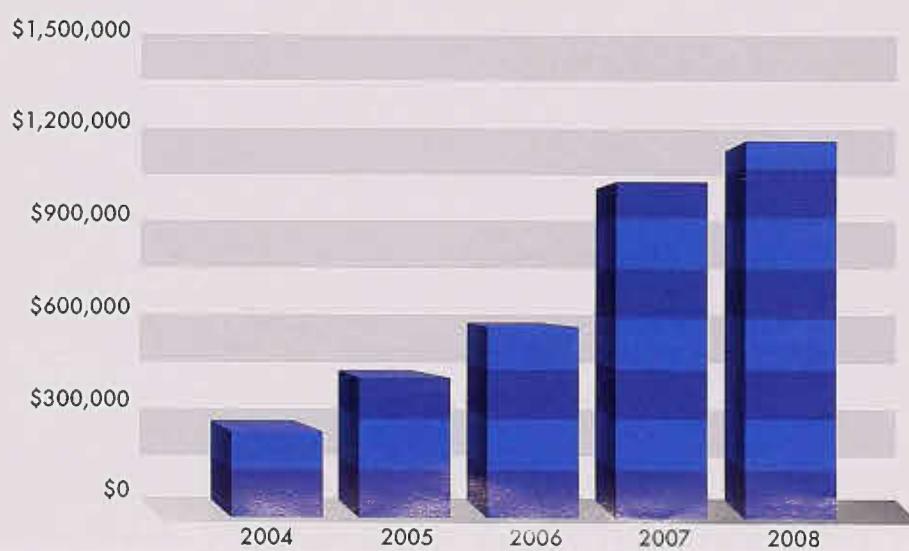
SUMMARY OF OPERATIONS



CONNECT Membership



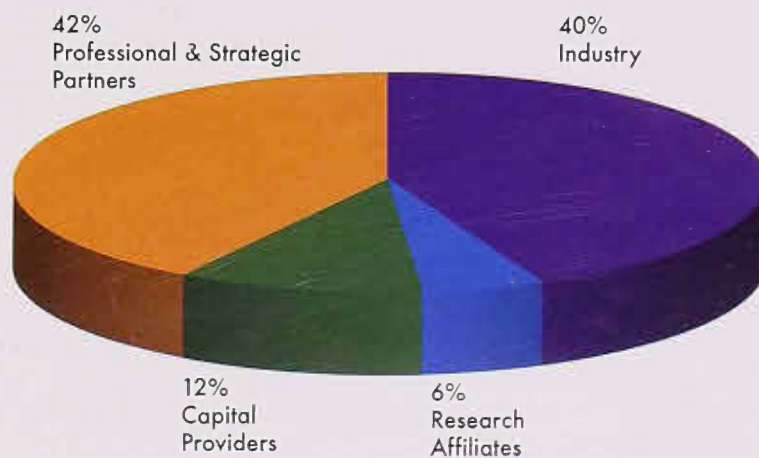
CONNECT Program Revenue



CONNECT Net Change in Ending Cash



CONNECT Membership Demographics



systems and cyber technology. Our clean technology initiative led to the formation of the trade organization CleanTECH San Diego this past year.

To track our progress, we have launched the CONNECT Innovation Quarterly Report. The Report includes CONNECT-track – the first comprehensive look at new business creation in the technology-based innovation sector across California, along with these four additional indicators of economic innovation in San Diego:

- new patent applications,
- research grant awards,
- institutional research employment, and
- angel and venture capital investment.

CONNECT is partnering with the San Diego Institute for Policy Research, UCSD Extension, PricewaterhouseCoopers, and Procopio, Cory, Hargreaves & Savitch LLP to gather and present the data and trend analyses. The results will provide a valuable indicator of the economic strength and impact of the knowledge economy in San Diego for business leaders, policy makers and researchers.

At CONNECT we are grateful for the support of our thousands of volunteers and more than 200 members who give generously of their time and resources to invest in the innovative economy in San Diego.

Sincerely,

Chief Executive Officer



The results of the past 20 years in the San Diego innovation economy are spectacular by any measure. San Diego is now home to more than 1,100 communications technology companies and more than 500 biotech companies. Last year alone, 367 new technology companies were launched.

- 500 LIFE SCIENCES COMPANIES, 98 new this past year
- 50 RESEARCH INSTITUTES
- 1,100 COMMUNICATIONS TECHNOLOGY COMPANIES, 61 new this past year
- 340 COMPUTER SERVICES COMPANIES, 184 new this past year
- 200 CLEAN TECH COMPANIES, 14 new this past year
- 650 ACTION SPORTS COMPANIES, 6 new this past year
- DEFENSE COMPANIES, 4 new this past year

San Diego's life science industry garnered \$3.2 billion in venture capital investments from 2004 through 2007

367 new companies launched in 2007

– CONNECT Innovation Quarterly Report



This year, CONNECT mobilized 1,200 volunteers to collaborate in mentoring, coaching, advising, and evaluating more than 1,000 companies. We're delighted to report that the combined collaboration of talent, time and resources is producing a wide range of measurable results.

In the past three and a half years, 105 companies have completed our Springboard Program. Sixty-two percent are still in business and have raised nearly \$100 million in capital.



OPERATIONS REPORT

By Camille Sobrian,
Chief Operating Officer

In the last three years, CONNECT has doubled the number of programs from 12 to 26. This past year, more than 10,000 signed up to attend our 300 events. Attendees consistently rank all our programs at four out of five or higher in quality and satisfaction.

In September 2008, CONNECT received national recognition in *The New York Times*, "CONNECT was a huge help because scientists need help from people who know something about business...CONNECT helped Biomatrix get a \$1 million investment from an angel investor and then advised the company on securing technical partners in molecular diagnostics."

In late 2007, after UK Prime Minister Gordon Brown commissioned an in-depth review of his country's science and innovation and CONNECT's operations, the UK government dedicated £1 billion over three years to boost business innovation and technology development and plans to model the new system on CONNECT:

US CONNECT is a scheme set up in 1985 by the University of California, San Diego in close collaboration with local business to meet the varying needs of entrepreneurs. The scheme links high technology entrepreneurs with the resources they need for success. Within the context of the Business Support Simplification Program, the Department for Innovation, Universities and Skills (DIUS) has asked Regional Development Agencies (RDAs) to examine the US CONNECT scheme in detail. RDAs are to identify lessons learnt from the scheme and how this learning can be applied effectively in the UK.

– Implementing "The Race to the Top": Lord Sainsbury's Review of Government's Science and Innovation Policies, 2008

Demand continues around the world for our Springboard "Bridge Program" operated in partnership with UCSD Global CONNECT. This year, we conducted Springboard panels for six early-stage companies from the UK and Taiwan that had potential and motivation to enter the U.S. market. Through Springboard, we introduced potential customers, strategic partners, investors and entrepreneurs. We are scheduled to conduct further programs this year for these two countries along with Norway.

We also continue to receive requests for assistance from other jurisdictions and countries interested in accelerating innovation and commercialization of technology. There are now 50 CONNECT-style

programs around the world and more regions contact us everyday. To meet the need, the Springboard team has documented the entire program in a handbook format and developed an accompanying training program. Called "Springboard-in-a-box," the program is being marketed worldwide in partnership with Global CONNECT.

This past year, the Springboard team launched a program called "Early Business Assessment" and built university collaborations with UCSD, SDSU, and La Jolla Institute for Allergy and Immunology Technology Transfer offices. Our entrepreneurs-in-residence (EIRs) assisted individual researchers in identifying the commercialization potential of their discoveries and, as a result, eight discoveries moved into the Springboard Program. Professor Roberta Gottlieb and Dr. Mark Sussman of SDSU have completed the Springboard Program and received multi-year grants to complete their research.

The 60 experienced business leaders in our EIR program provided hands-on mentoring to the 52 companies that graduated from Springboard this past year. EIRs David Kramer, Brant Cooper, David Kaplan, Elyse Dasko and Diane Law launched valuable new business development tools to assist innovators who are participating in the program, including valuation training modules, a marketing template and financial modeling tools.

Operations funding is raised from table and ticket sales at events along with membership dues and sponsorship from more than 200 members, including leading technology corporations, professional services providers, venture capital, research institutions and vendors to the technology industry.

The collaboration of CONNECT members and volunteers is critical to helping strengthen and diversify our local economy to be able to weather these challenging economic times and also build a foundation for future economic prosperity in the region.

Sincerely,

A handwritten signature in black ink that reads "Camille Sobrian".

Chief Operating Officer



“CONNECT has set a nationwide standard for programs and resources necessary for entrepreneurs and innovators to take ideas from concepts to markets.”

– Bryan Bjorndal, President & CEO, Assure Controls, Inc.

“The Wireless-Life Sciences Summit was an ideal forum to talk with CEOs of innovative life sciences and wireless companies who have launched, or who are working on, convergence solutions. It provided us with an opportunity to explore strategic partnerships and it was a very valuable use of my time.”

– Paul Jacobs, CEO, QUALCOMM, Inc.

CONNECT now offers 26 programs totaling more than 300 events per year to support the region’s innovation economy:

TECHNOLOGY DISCOVERY

- Tech Transfer Roundtable
- Frontiers in Science & Technology
- The San Diego Research & Innovation Summit

TECHNOLOGY TRANSFER

- Early Business Assessment

PERSONALIZED ASSISTANCE

- Springboard

FINANCING

- Springboard Spotlight
- Tech Coast Angels*
- Venture Roundtable
- Deal Network
- CONNECT Roadshow

BUSINESS EDUCATION

- FrameWorks Workshops
- CEO Strategy Forum
- MIT Enterprise Forum of San Diego*

POLICY AND ADVOCACY

- CONNECT Innovation Quarterly
- Intellectual Property
- State and Federal R&D Funding
- University Funding
- Capital Formation
- Workforce Development
- Regulation & Trade
- CONNECT-Assist; Recruiting and Retaining Research & Management Talent

CLUSTER ACCELERATION

- Wireless-Life Sciences Alliance*
- Stem Cell Meeting on the Mesa*
- CleanTECH San Diego*
- Action & Sport Innovators
- Cyber Technology
- Unmanned Systems (UxS)

RECOGNITION AND NETWORKING

- Connect with CONNECT
- Leadership Dinners
- Entrepreneur Hall of Fame
- Most Innovative New Product Awards
- CONNECT Resource Guide

* affiliate/CONNECT-managed program



THE CONNECT TEAM



Duane Roth,
Chief Executive Officer



Stefanie Battaglia,
Executive Assistant
to the CEO



Camille Sobrian,
Chief Operating Officer



Teresa Rorer,
Executive Assistant to the
COO / Office Manager



Ruprecht von Buttlar,
Director of
Commercialization &
Financing Programs



Holli Garrett,
Director of Community
Programs



Ilana Brand,
Director of Innovation
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Bethany Kraynack,
Director of Education
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Taylor Peterson,
Director of New Sector
Development



Karen Winston,
Director of Affiliate
Programs



Steve Hoey,
Manager of Springboard
and Angel Financing
Programs



Dea Simon,
Manager of Venture
Programs



Nancy van Dillen,
Manager of Most Innovative
New Product Awards



Joe Gram,
Marketing Communications
Coordinator



Jessie Womble,
Membership Coordinator



Linda Wells,
Event Coordinator

20TH ANNUAL MOST INNOVATIVE NEW PRODUCT AWARDS WINNERS

Clean Technology: Advanced Transit Dynamics, Inc., TrailerTail

Communications Technology & Hardware: Luxtera, CMOS Photonics 10Gbps transceiver

General Technology: Senomyx, Inc., Senomyx Savory Flavor Ingredients

Life Sciences – Diagnostics & Research Tools: RegeneMed, Inc., RegeneTOX

Life Sciences – Medical Products: Artes Medical, ArteFill

Security Technology: Seacoast Science, SC-210

Software & Information Technology: AIRSIS, Inc., PortVision

CONNECT Distinguished Contribution Award in Technology:

Mary Walshok, Dean, UCSD Extension

CONNECT Distinguished Contribution Award in Life Sciences: Ted Roth,

Managing Director, ROTH Capital Partners, San Diego

William W. Otterson Award: DUV Lithography Lightsource by Cymer, Inc.

Thank you to our volunteers:

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Duane Roth, CEO, CONNECT

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Frieder Seible, Dean, Jacobs School of Engineering, UCSD

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David Titus, General Partner, Windward Ventures

Mary Walshok, Associate Vice Chancellor, Public Programs, and Dean, UCSD Extension

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Gwen Rosenberg, Vice President, Investor Relations & Corporate Communications, Senomyx, Inc.

Jim Waring, Chairman, CleanTECH San Diego

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Inductee, 2005



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Managing Member
Forward Ventures,
Inductee, 2006



Walter J. Zable
Chairman, President and
CEO, Cubic Corporation
Inductee, 2006



Dr. William H. Rastetter
Chairman, Illumina
Inductee, 2007



Dr. J. Robert Beyster
Founder, SAIC
Inductee, 2008



Neal Blue
Chairman and CEO
General Atomics
Inductee, 2009



Linden Blue
Vice Chairman
General Atomics,
Inductee, 2009

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Hunt Eggleston, EIR, CONNECT
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& Secretary, San Diego Tech Coast Angels
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Steve Hoey, Program Manager, Springboard & Angel Financing Programs, CONNECT
Greg Horowitz, Executive Director, Global CONNECT
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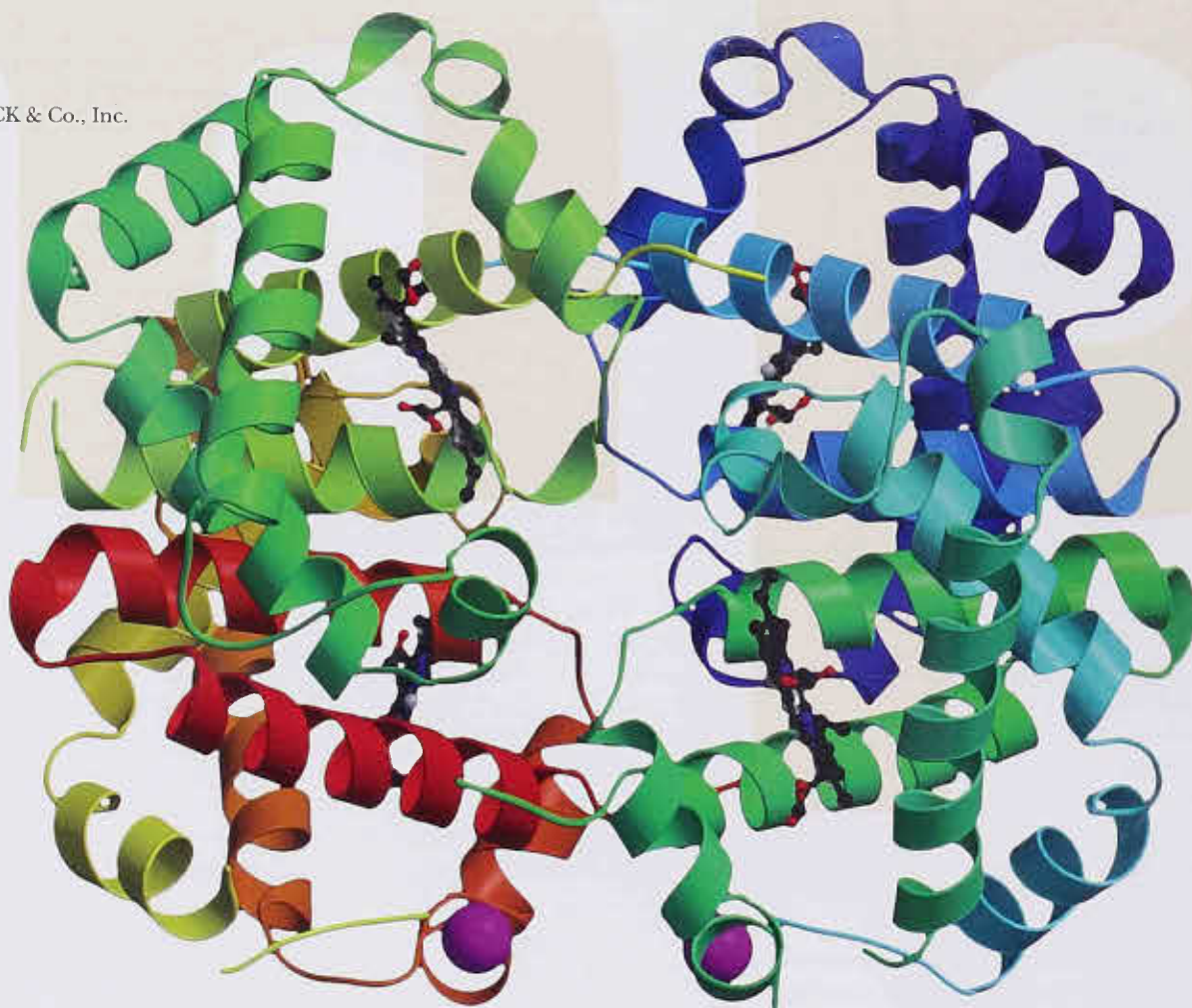
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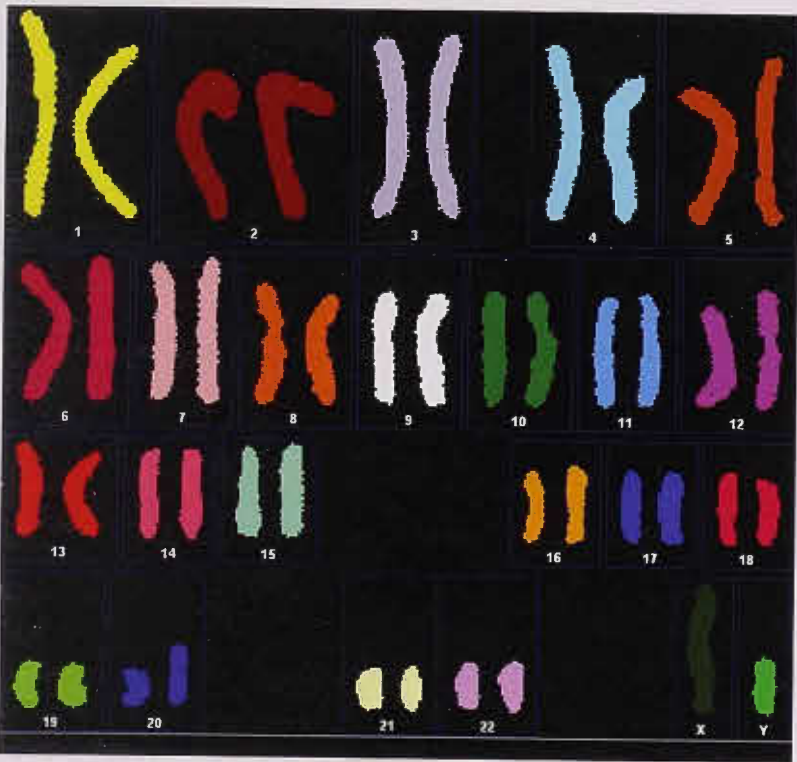
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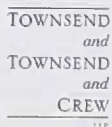
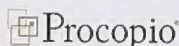
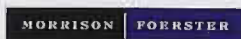
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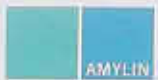
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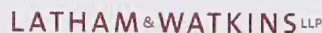
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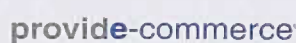
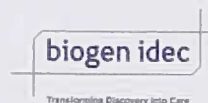


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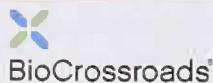
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Steven Parker, Obsidian Group
Kristian Rauhala, H2O Audio, Inc.
Yuval Shen
Nik Souris, Ollie Pop Bubblegum
Steve Stoloff, VAVi Sport & Social Club
Jim Stroesser, DirtBag Music & Apparel
Kathy Taylor, Road Runner Sports
Mitch Thrower, Competitor Group, Inc.
Izzy Tihanyi, Surf Diva, Inc.
Peter Townend, The ActivEmpire, Inc.
Katharine Wardle, Skinit, Inc.





From left to right: At CONNECT's 20th Annual MIP Awards: 1. Mayor of San Diego, Jerry Sanders announces the new Clean Technology category; 2. Chris Jennwein, former Vice President, Internet Sites at *The San Diego Union-Tribune* presents the CONNECT Distinguished Contribution Award in Technology to Mary Walshok, Associate Vice Chancellor, Public Programs and Dean, UCSD Extension; and, 3. Richard Atkinson, President Emeritus, University of California presents the William W. Otterson Award to Bob Atkins, Co-Founder, Chairman and CEO and Richard L. Sandstrom, Ph.D., Co-Founder, Senior Vice President and Chief Technical Advisor of Cymer, Inc. for DUV Lithography Lightsource.



From left to right: At CONNECT's 20th Annual MIP Awards: 1. Marco Thompson, Vice Chair, Technology, CONNECT Board, and Managing Director, Express Ventures recognizes CONNECT's Young Innovators Program; 2. David Marino, Principal, Executive Vice President, Irving Hughes, Inc. presents the Software & Information Technology award to AIRSIS, Inc. CEO Dean Rosenberg for PortVision; 3. Catherine Mackey, Vice Chair, Life Sciences, CONNECT Board and Senior Vice President, Global R&D, Pfizer, Inc., presents the CONNECT Distinguished Contribution Award in Life Sciences to Ted Roth, Managing Director, ROTH Capital Partners, San Diego; and, 4. At CONNECT's Frontiers in Science and Technology event, "Genomic Advances on a Grand Scale," speaker, Dr. J. Craig Venter signs his book, *A Life Decoded; My Genome: My Life*

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