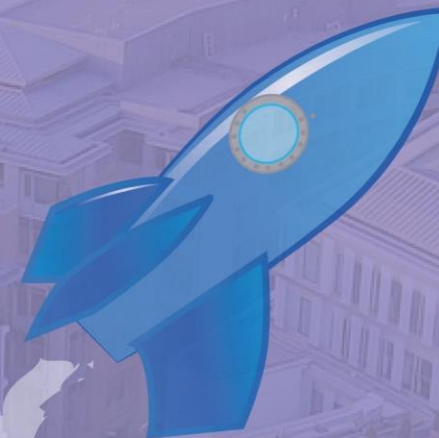


Startup  
Europe  
Partnership

STARTUP  
EUROPE



# SEP SCALEUP SUMMIT

LONDON | London Stock Exchange | June 28-29

#SEPS18

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# SUMMIT OPENING STATE OF THE ART

CHRIS CORRADO

CIO/COO, London Stock Exchange Group



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# KEYNOTE

## GLOBAL VC & CVC INDUSTRY

PROF. DR. MARTIN HAEMMIG

Coordinator of VC Community

@ WEF-Davos



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# REPORT LAUNCH

## TECH SCALEUP EUROPE

### 2018 REPORT

ALBERTO ONETTI  
Chairman, Mind the Bridge



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# TECH SCALEUP EUROPE, THE NUMBERS

**5596**  
Scaleups



**\$83.2B**  
Capital Raised

# KEY RATIOS

## SCALEUP DENSITY RATIO



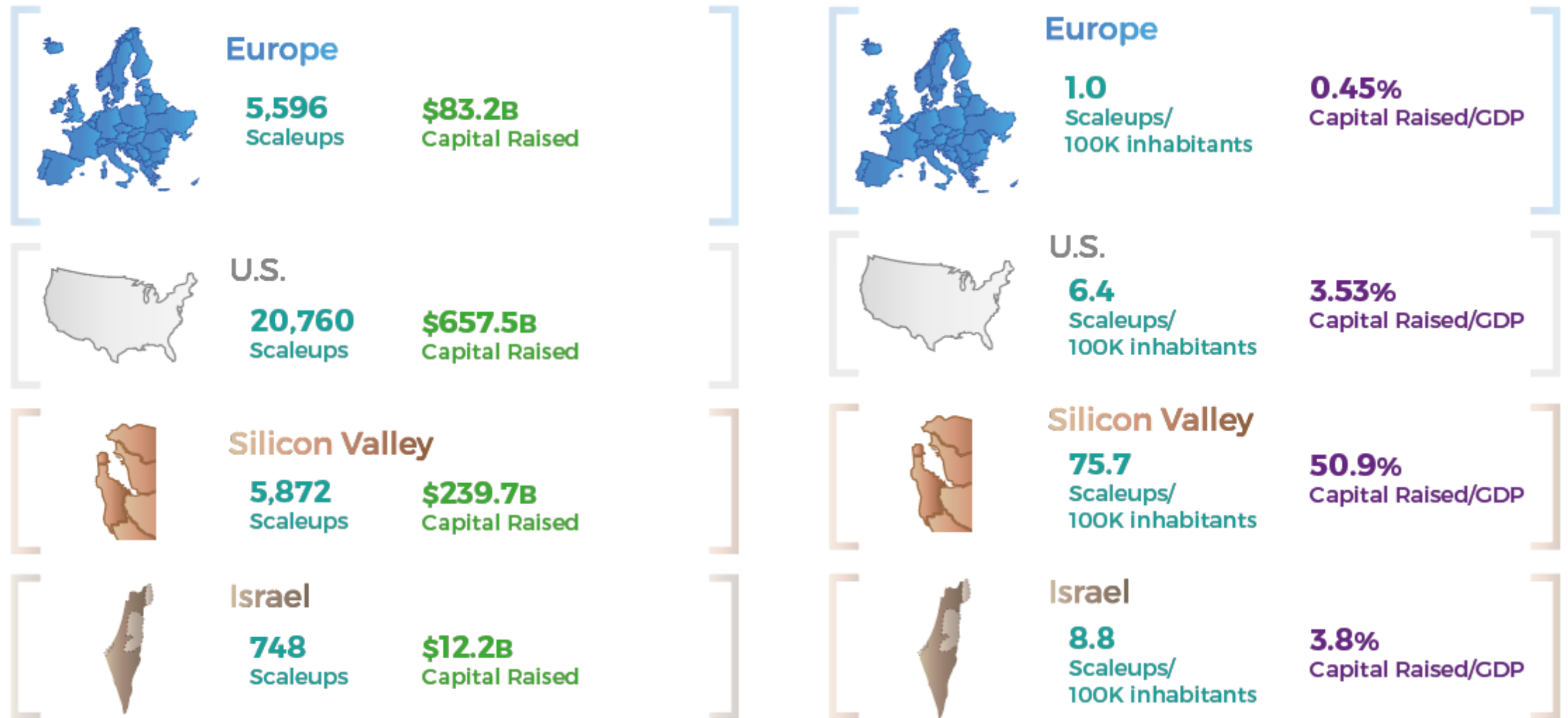
**1** Scaleup every  
100K people

## SCALEUP INVESTING RATIO

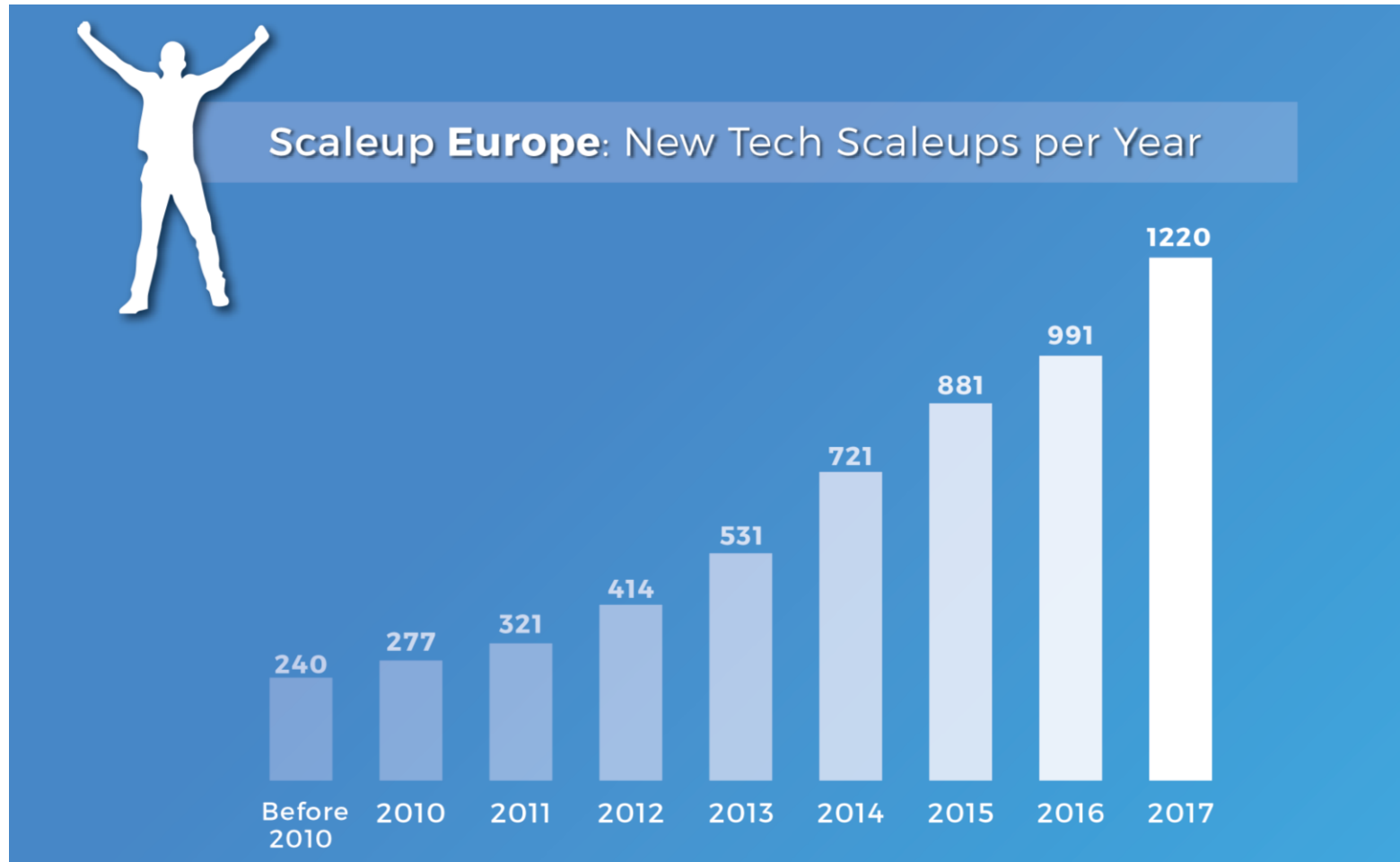


**0.45%**  
Cap. Raised/GDP

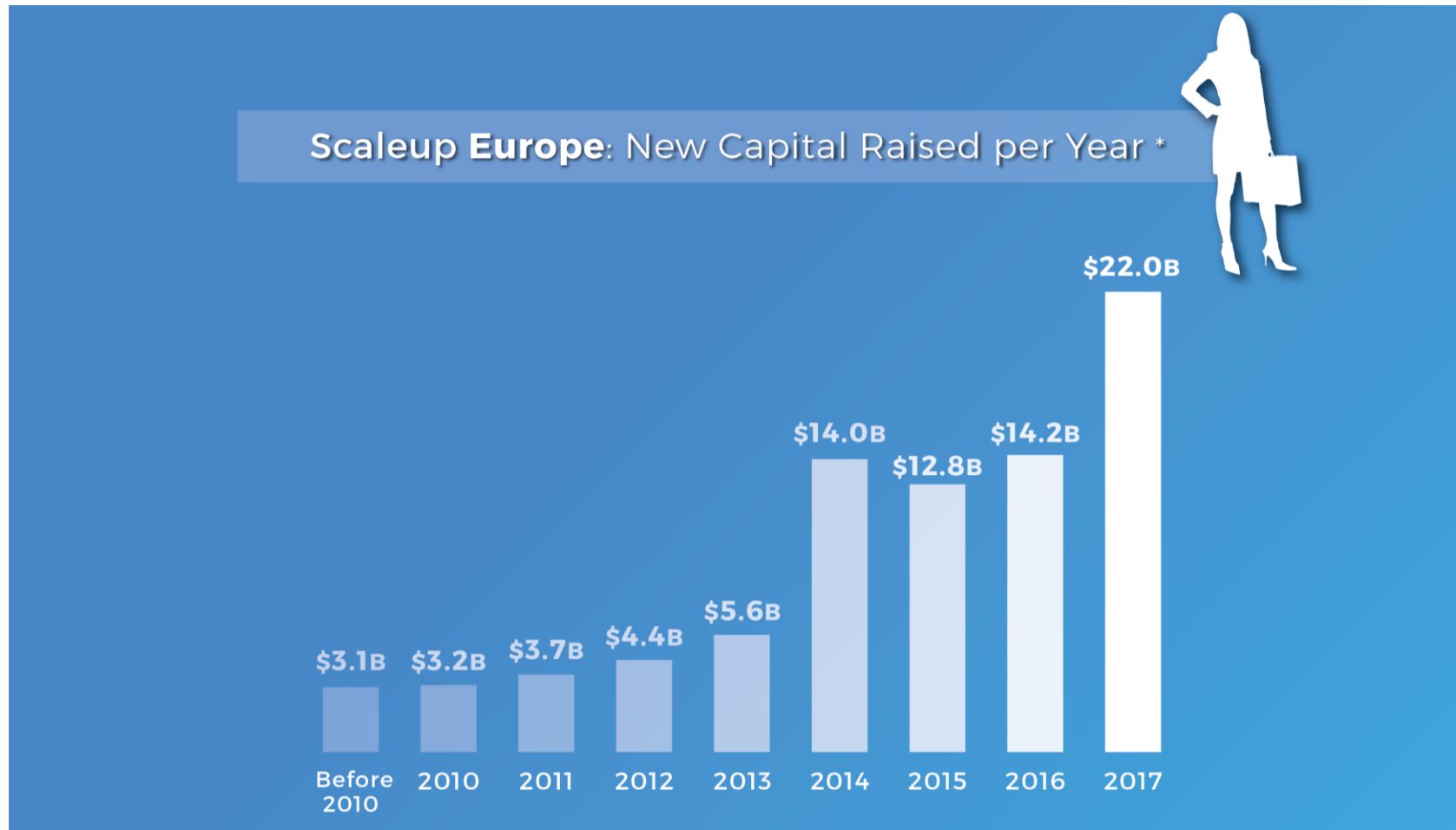
# INTERNATIONAL COMPARISON



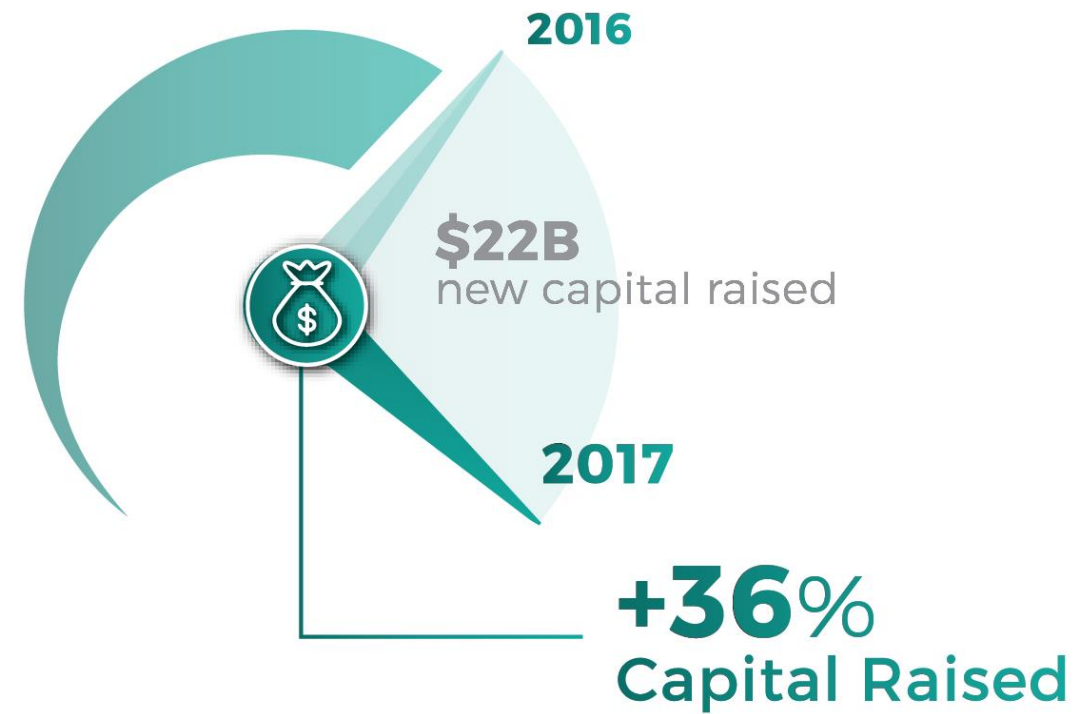
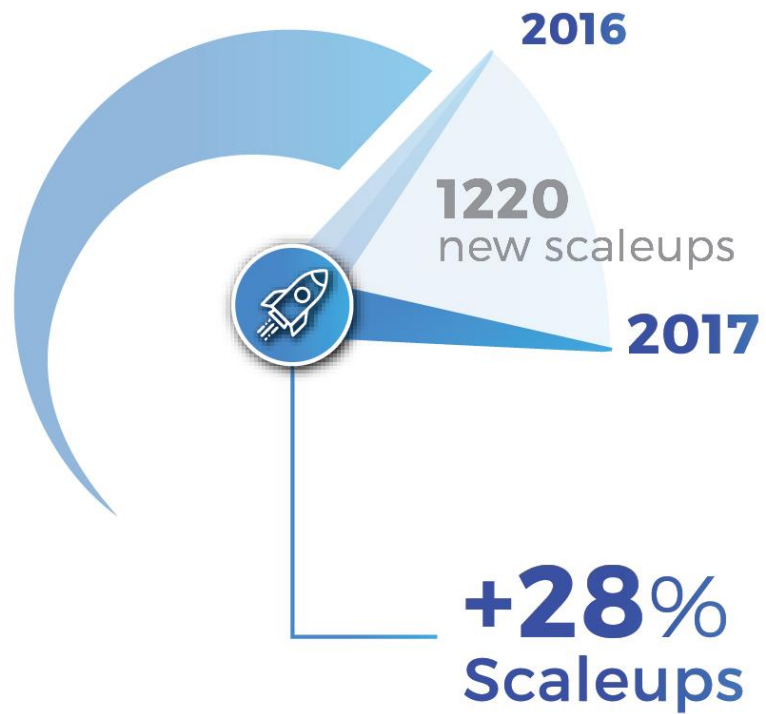
# 2017, THE TURNING POINT?



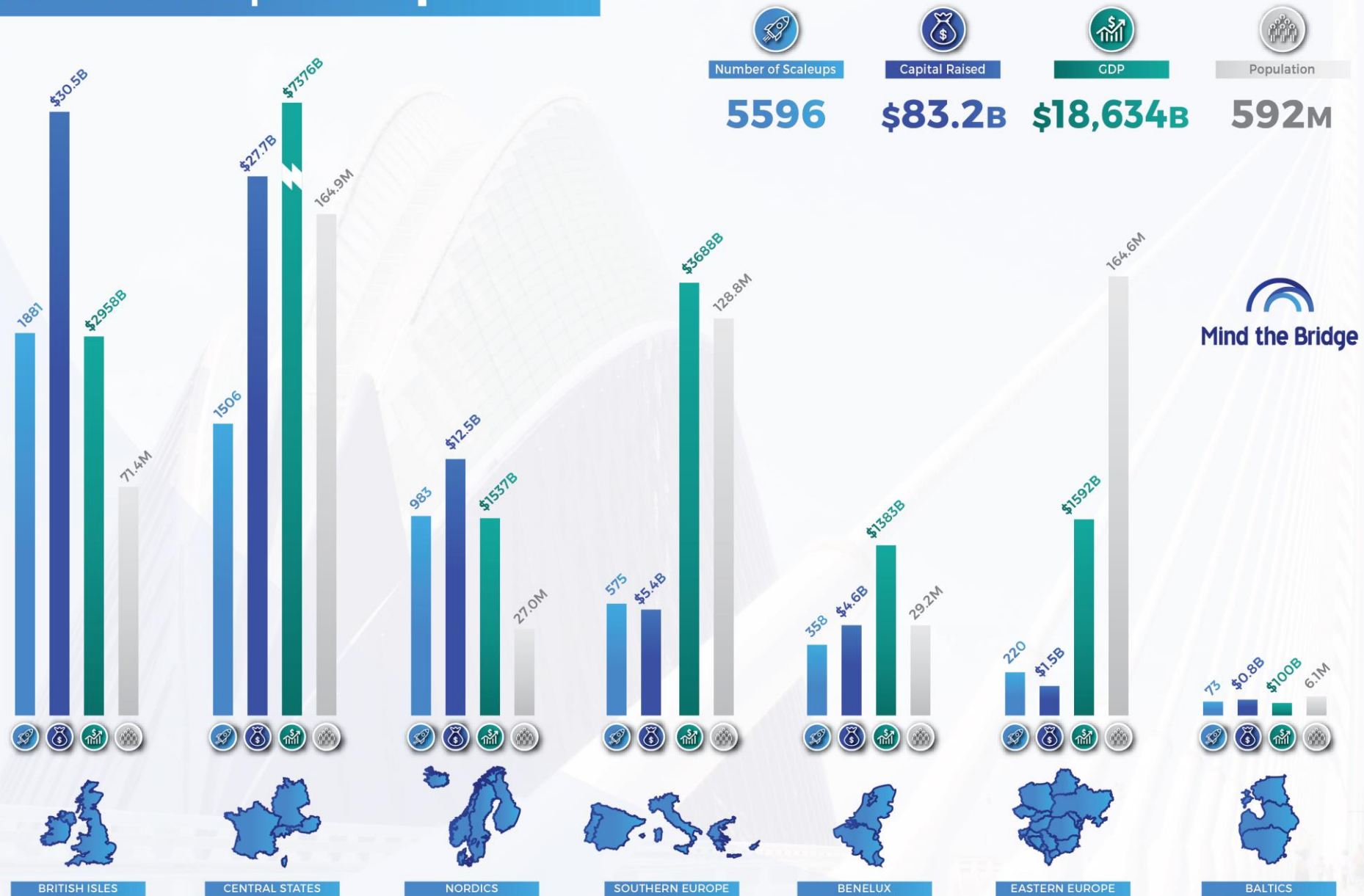
# A SUBSTANTIAL CHANGE OF PACE



# 2017 GROWTH

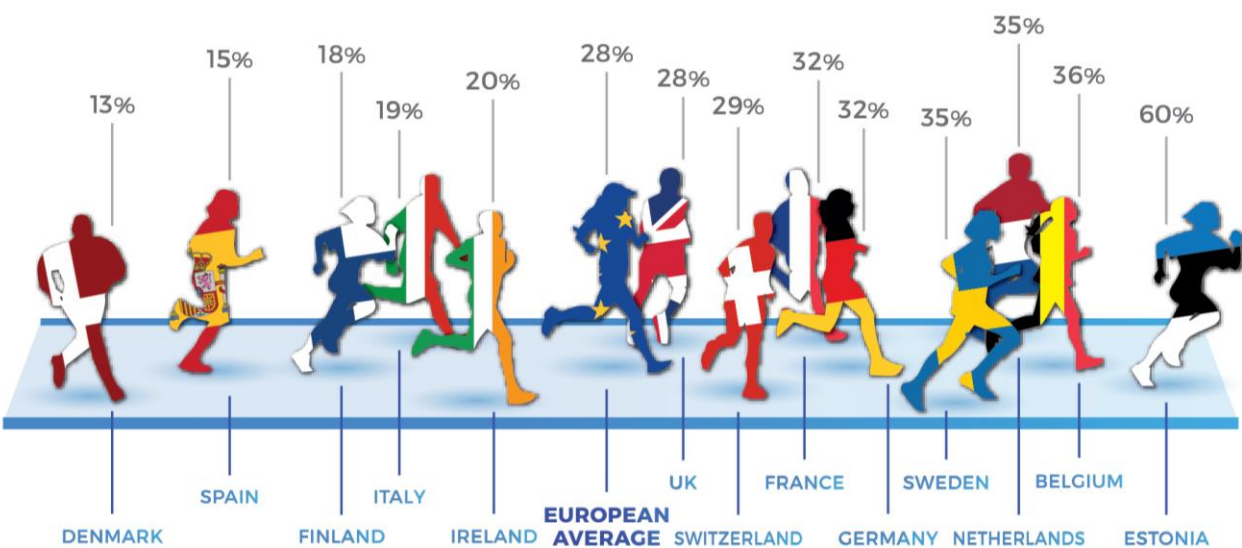


# Tech Scaleup Europe

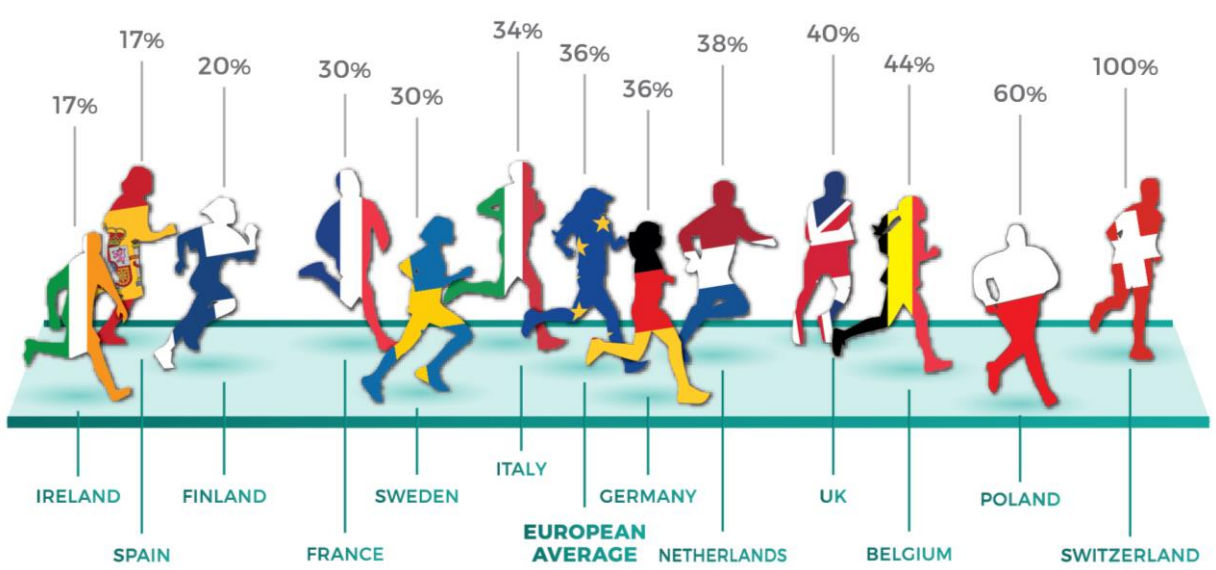


# SCALEUP SPRINTERS: DIFFERENT RUNNING PACES

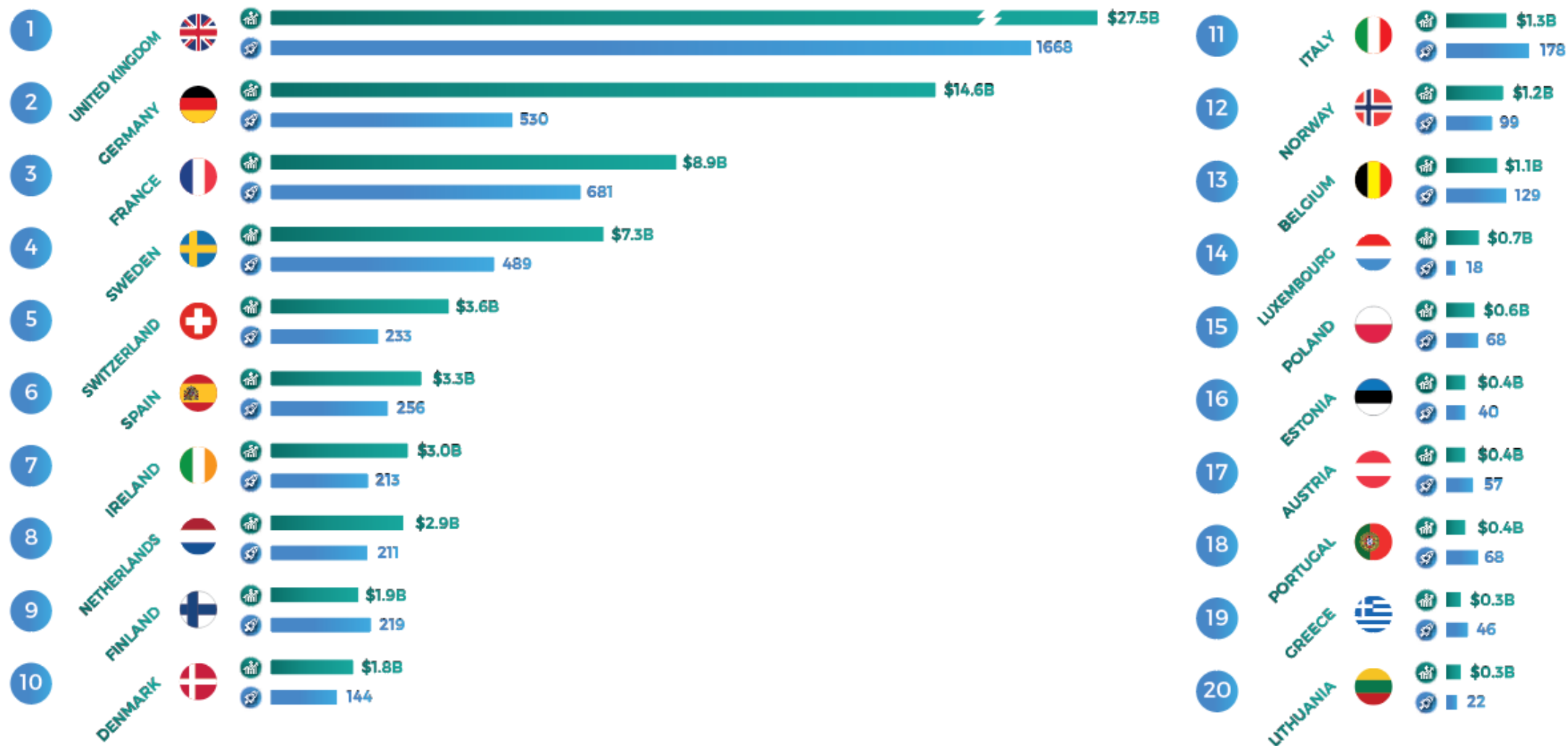
NEW SCALEUPS IN 2017 (%)



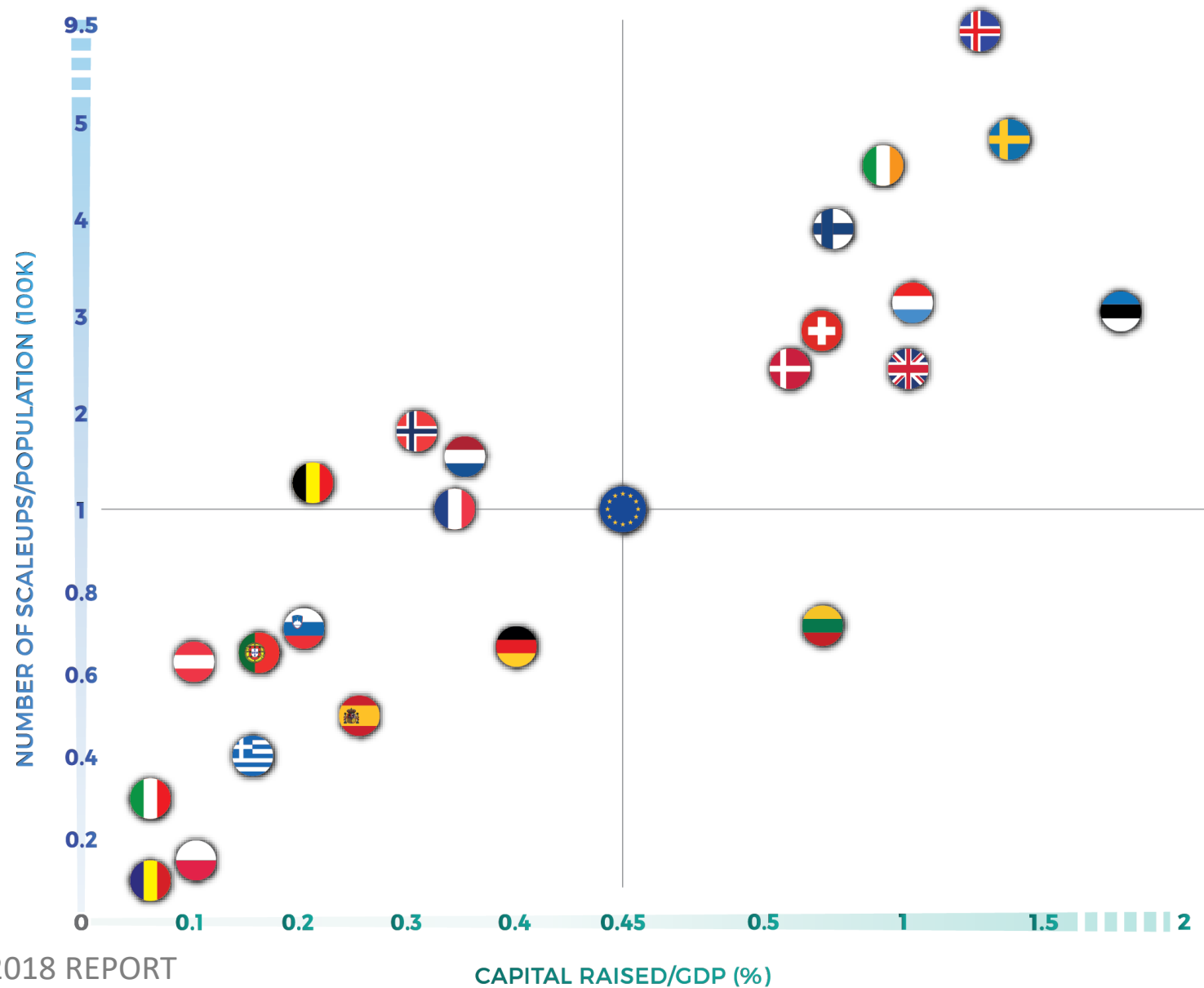
NEW CAPITAL RAISED IN 2017 (%)



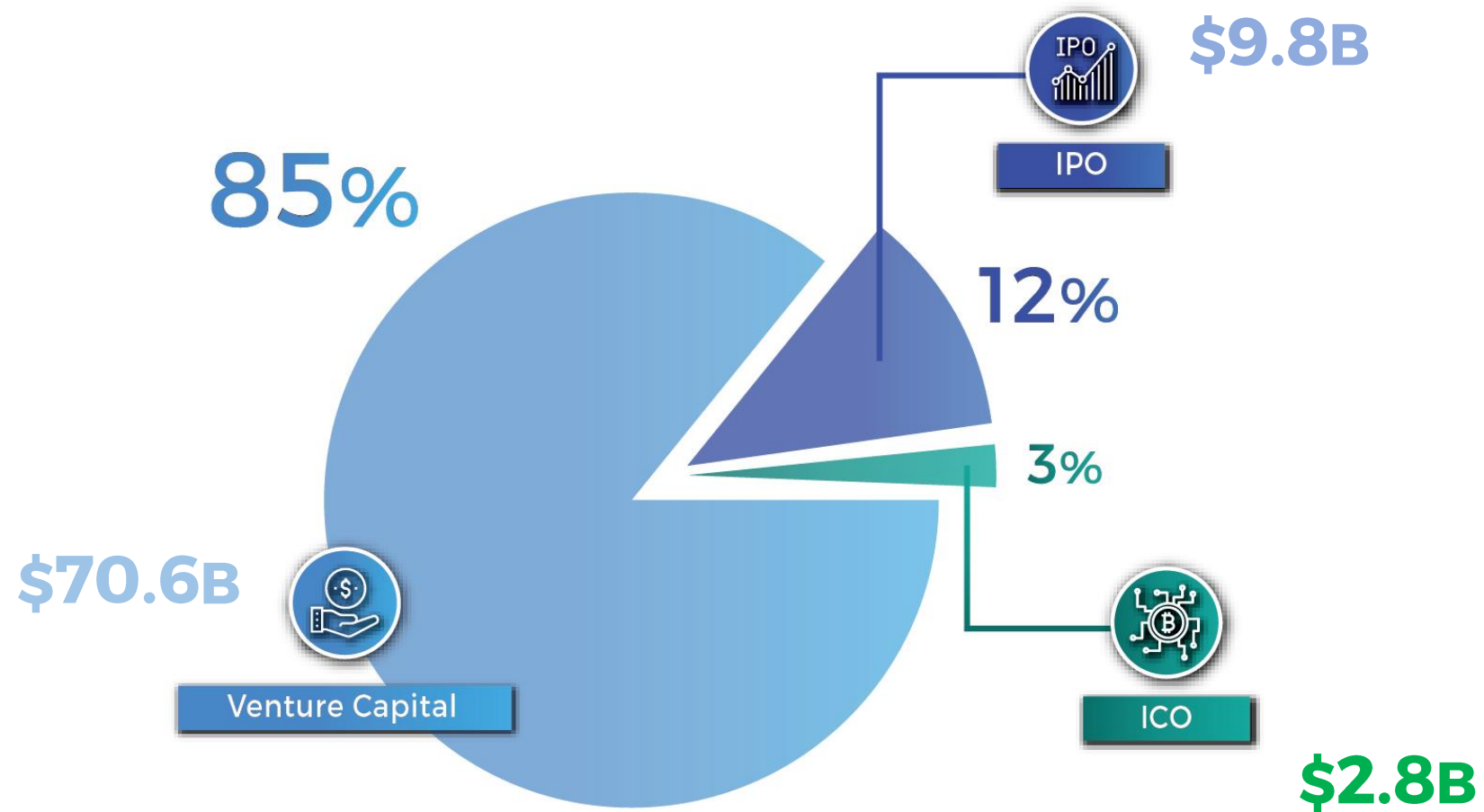
# SCALEUP EUROPE COUNTRY INDEX



# SCALEUP EUROPE GROWTH MATRIX: THE KINGS STAY IN THE NORTH



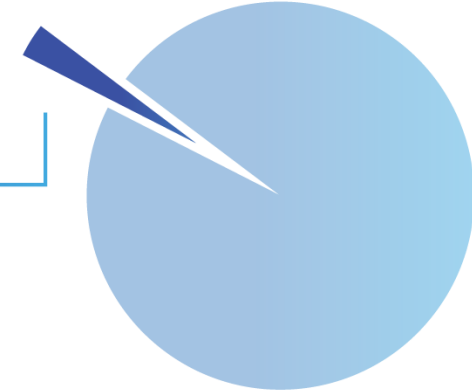
# SCALEUP EUROPE FUNDING PATHS: VC vs. IPO vs. ICO



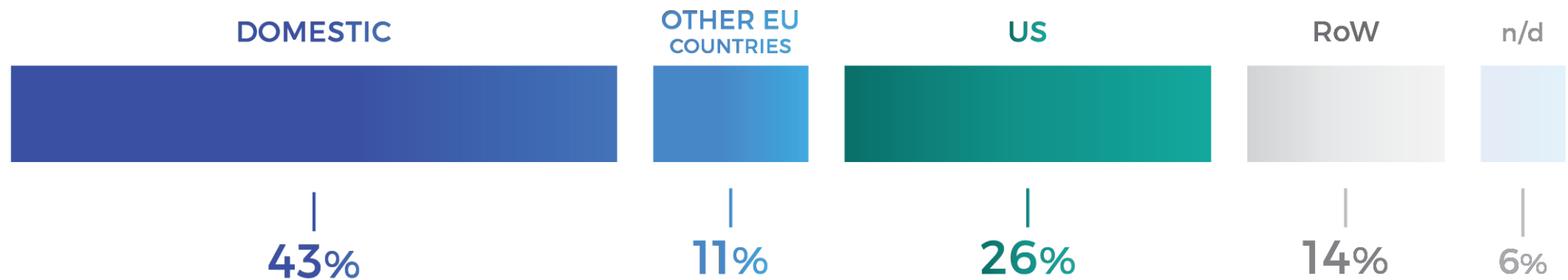
# ICOs: THE THIRD (EUROPEAN) WAY?

**\$2.8B**  
Capital Raised

**3%**  
raised through **ICO**



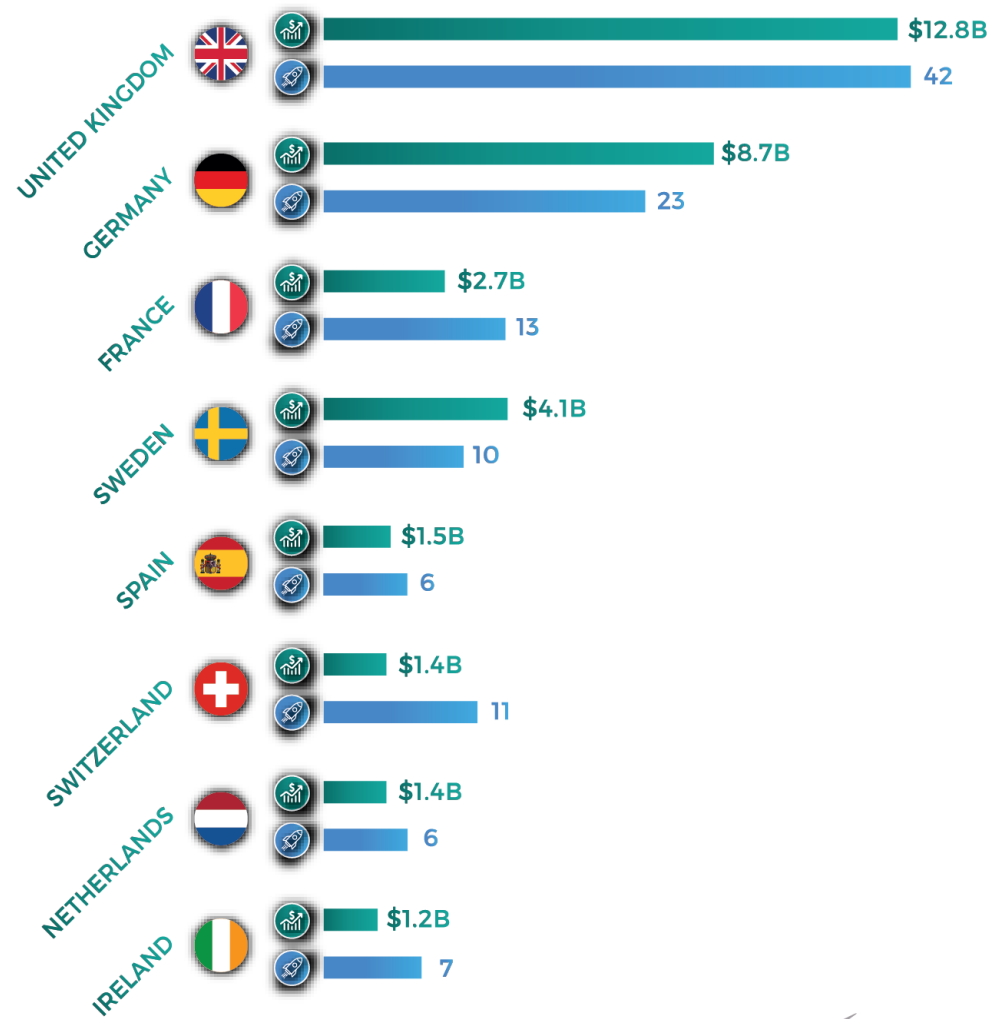
# WHO IS INVESTING IN EUROPEAN SCALEUPS?



# European Tech Scalars



# SCALEUP EUROPE COUNTRY INDEX (Scalers Only)

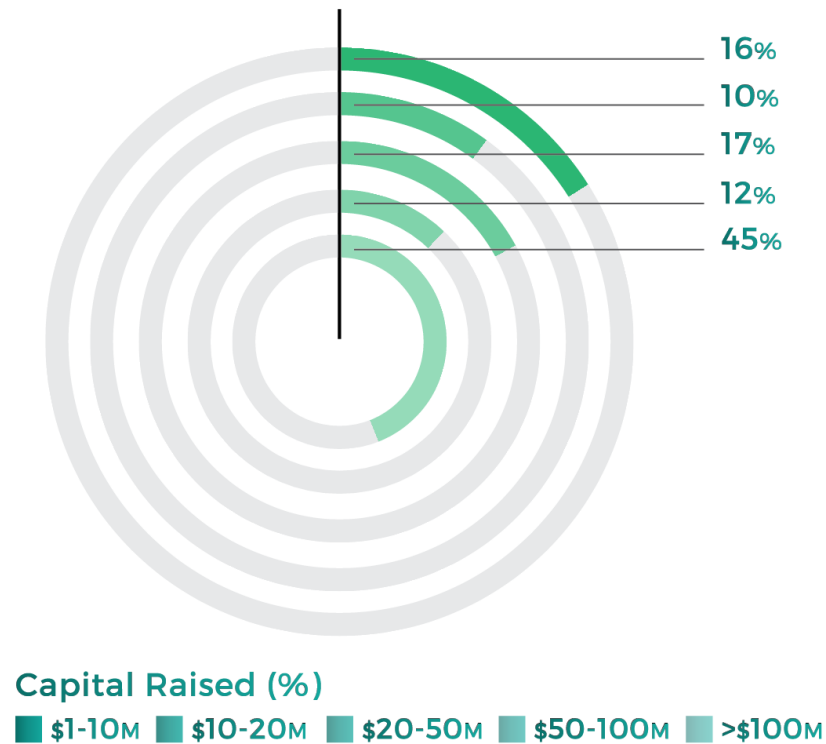
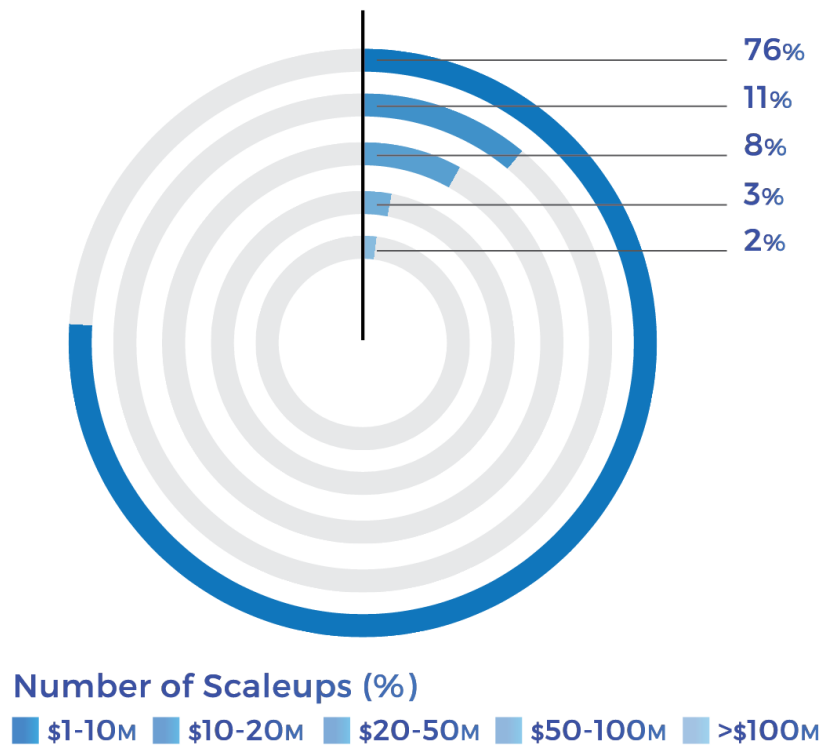


134  
Scalers

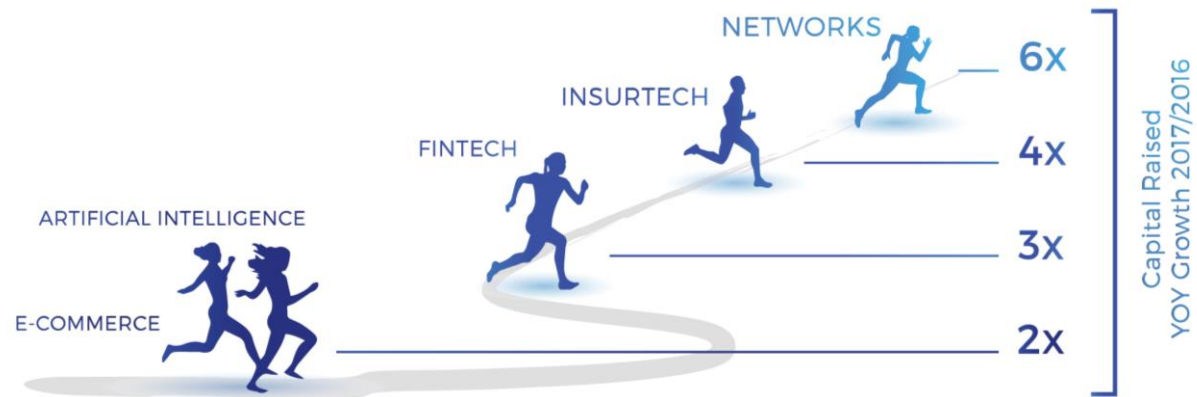
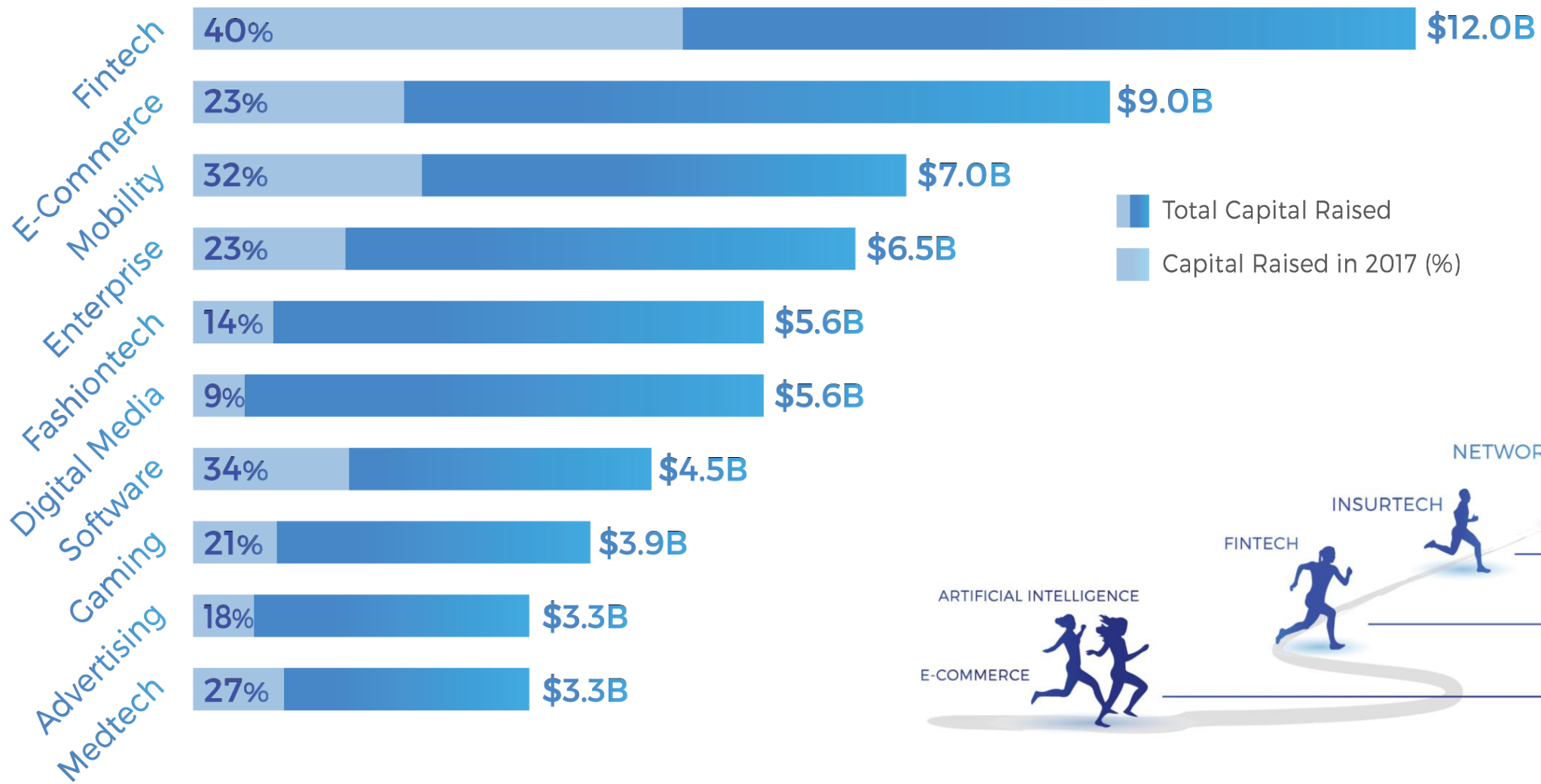
\$36.9B  
Cap. Raised



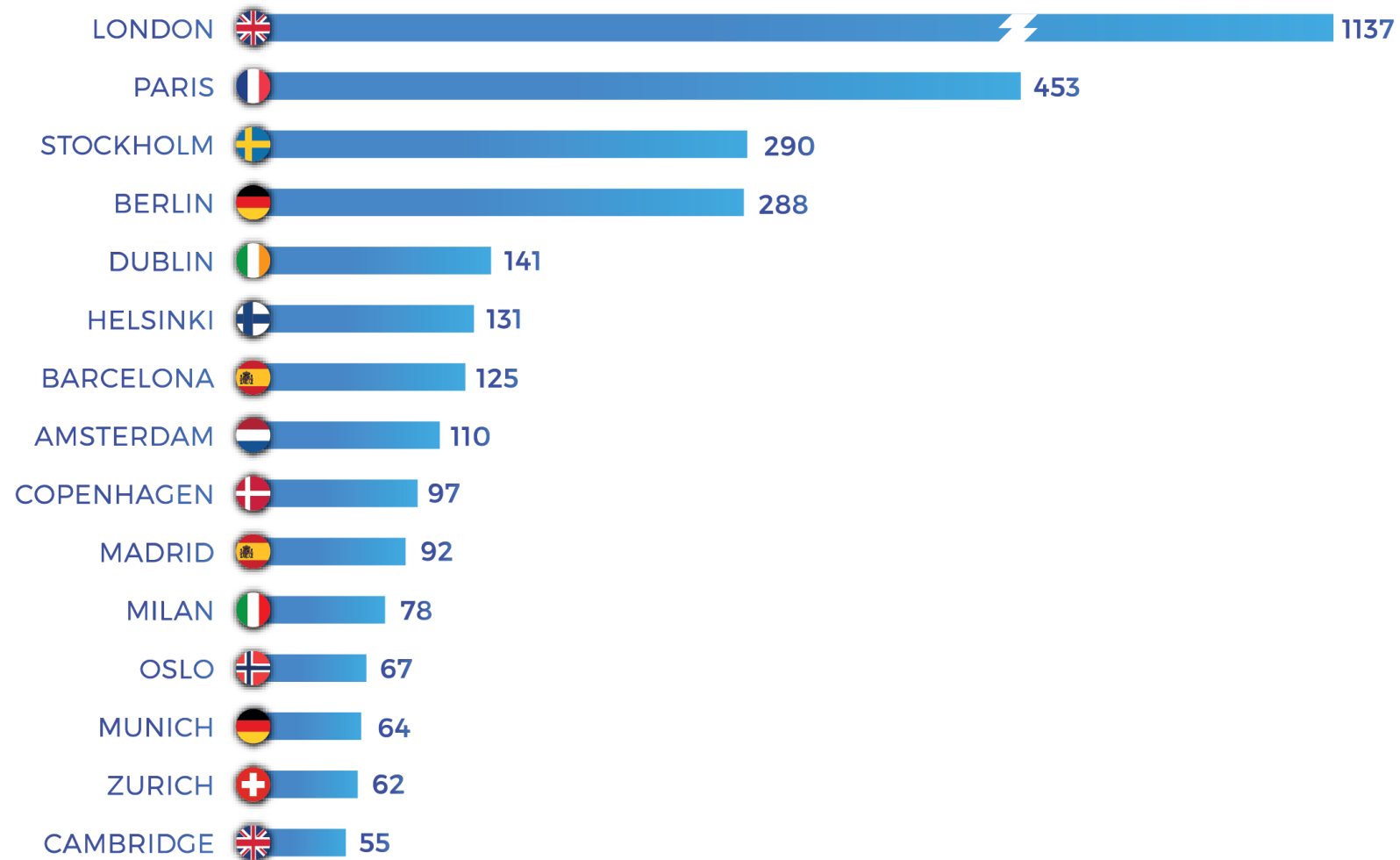
# EUROPE IS LAND OF SMALL SCALEUPS



# FINTECH DRIVES THE TECH INDUSTRY IN EUROPE



# SCALEUP EUROPE CITY HUB INDEX



# THANK YOU

Download the Report  
for free at:

[www.mindthebridge.com/research](http://www.mindthebridge.com/research)



Mind the Bridge

## TECH SCALEUP EUROPE 2018 Report

SEP Monitor



Startup  
Europe  
Partnership



# WELCOME & SUMMIT OVERVIEW

AGENDA, WHO'S WHO, EXPECTATIONS  
AND PRESS ANNOUNCEMENTS

ALBERTO ONETTI

Chairman  
Mind the Bridge

ISIDRO LASO

Head of Startup Europe  
European Commission



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# SEP SCALEUP SUMMIT AGENDA

**JUNE 28th, Thursday**

**09.00 - 09.45 REGISTRATION / WELCOME COFFEE**

**09.45 - 10.00 WELCOME**

BY CHRIS CORRADO, CIO/COO, LONDON STOCK EXCHANGE GROUP  
AND ALBERTO ONETTI, CHAIRMAN MIND THE BRIDGE

**10.00 - 10.30 SUMMIT OPENING: STATE OF THE ART**

BY CHRIS CORRADO, CIO/COO, LONDON STOCK EXCHANGE GROUP

**10.30 - 11.00 KEYNOTE: GLOBAL VC & CVC INDUSTRY**

BY PROF. DR. MARTIN HAEMMIG, COORDINATOR OF VC COMMUNITY @ WEF-DAVOS

**11.00 - 11.15 LAUNCH OF TECH SCALEUP EUROPE 2018 SEP MONITOR**

BY ALBERTO ONETTI, CHAIRMAN MIND THE BRIDGE

**11.15 - 12.00 WELCOME AND SUMMIT OVERVIEW: AGENDA, WHO'S WHO, EXPECTATIONS, PRESS ANNOUNCEMENTS**

BY ALBERTO ONETTI, CHAIRMAN MIND THE BRIDGE  
AND ISIDRO LASO BALLESTEROS, HEAD OF STARTUP EUROPE - EUROPEAN COMMISSION

**12.00 - 13.00 NETWORKING LUNCH**

**13.00 - 16.00 PARALLEL SESSIONS**



**CORPORATES**

**OPEN INNOVATION BOOT CAMP**



**SCALEUPS**

**GROWTH FINANCING  
ASSESSMENT**



**INVESTORS**

**SEP INVESTORS FORUM**

**16.00 - 19.00 VERTICAL DEEP DIVES**

16.00 - 16.45 AI Customer Behaviour  
*powered by Enel*

17.30 - 18.15 Digital Construction and Infrastructures  
*powered by Autodesk and Acciona*

**1:1 CURATED MATCHING**

16.00 - 16.45 1:1 Meetings

16.45 - 17.30 1:1 Meetings

17.30 - 18.15 1:1 Meetings

18.15 - 19.00 1:1 Meetings

**20.30 - 23.30 COCKTAIL & GALA DINNER AT BANKING HALL (DRESS CODE: BLACK TIE)**



# SEP SCALEUP SUMMIT AGENDA

**JUNE 29th, Friday**

**08.00 - 08.15 MARKET OPENING AT LONDON STOCK EXCHANGE & VIP BREAKFAST**

**08.15 - 09.00 1:1 CURATED MATCHING**

08.15 - 09.00 1:1 Meetings

**09.00 - 12.00 VERTICAL DEEP DIVES**

09.00 - 09.45 AI Enterprise Solutions

*powered by SAP*

09.45 - 10.30 Fintech

*powered by Barclays*

10.30 - 11.15 Insurtech

*powered by BNP Paribas Cardif & Cargass*

11.15 - 12.00 Industry 4.0

*enabled by DG GROW (European Commission)*

**1:1 CURATED MATCHING**

09.00 - 09.45 1:1 Meetings

09.45 - 10.30 1:1 Meetings

10.30 - 11.15 1:1 Meetings

11.15 - 12.00 1:1 Meetings

**12.00 - 13.00 NETWORKING LUNCH**

**13.00 - 16.00 1:1 CURATED MATCHING**

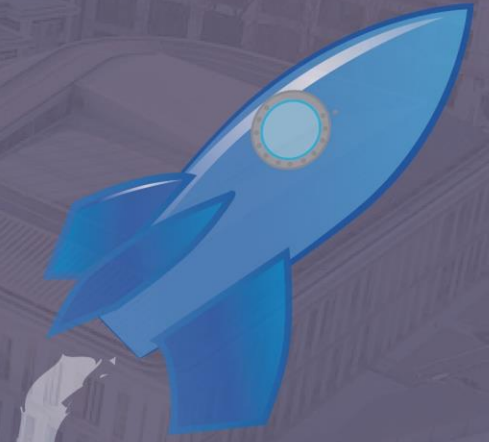
13.00 - 13.45 1:1 Meetings

13.45 - 14.30 1:1 Meetings

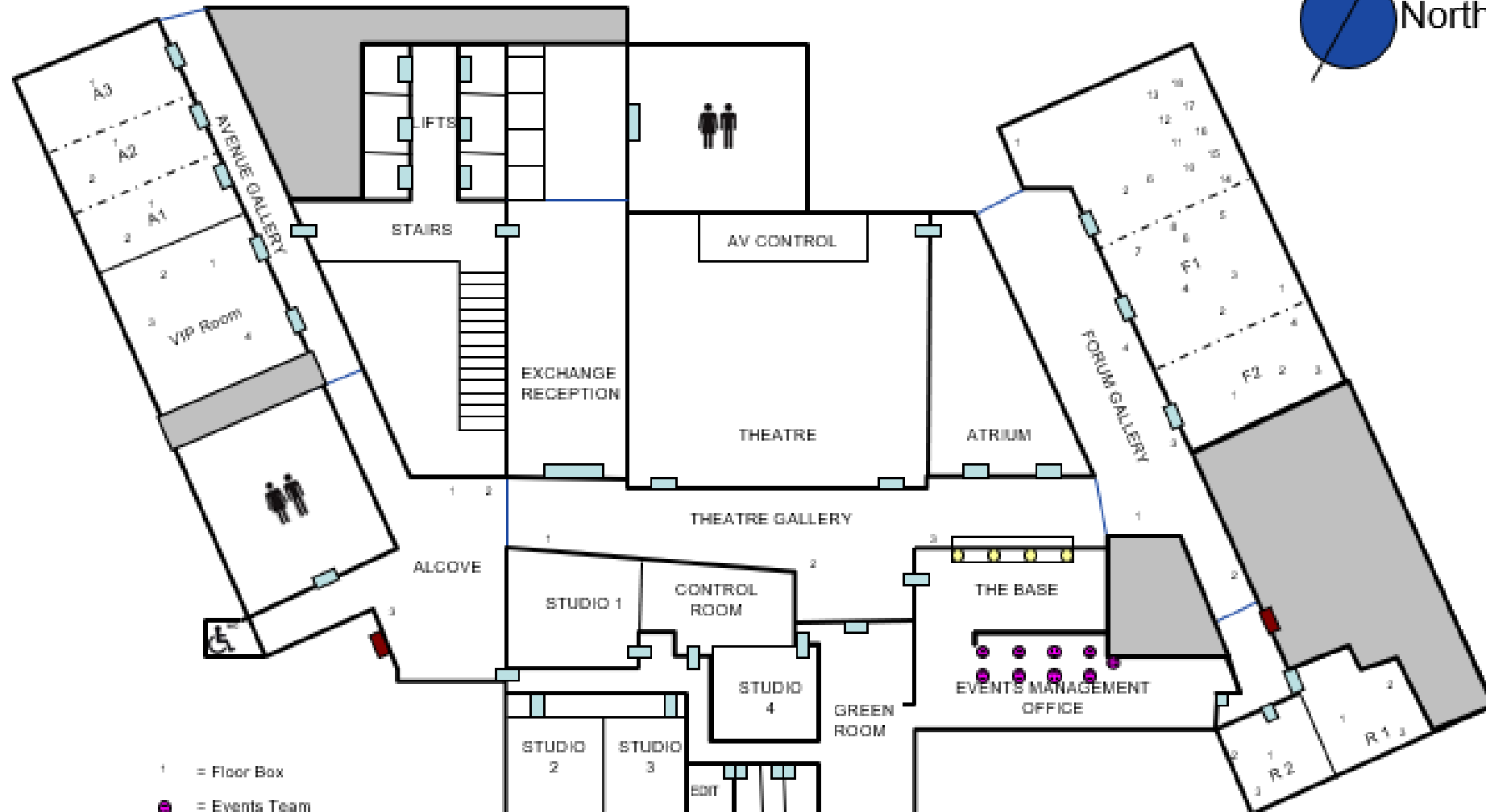
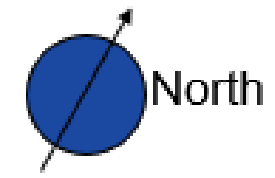
14.30 - 15.15 1:1 Meetings

15.15 - 16.00 1:1 Meetings

**16.00 - 16.30 CLOSING**



# 1st Floor Plan



See who is attending  
Plan your day  
Schedule 1:1 meetings



## 0 – Download the Brella App

*Use our code SEPSS18 to join us. Available for Android and iOS*

## 1 – Sign In

*We suggest to login using LinkedIn*

## 2 – About Yourself

*Answer a few questions to get suggestions*

## 3 – View Attendees

*Scroll through connections*

## 4 – Book Meetings

*Click on «Suggest Meeting», select a potential time, chat and meet!*



# *Black Tie Gala Dinner*

Guest of Honor:

Sherry Coutu, Serial Entrepreneur and Angel Investor

June 28, 2018 - Doors open at 8<sup>00</sup> PM

Banking Hall, 14 Cornhill, London

# SEP ELITE TECH SCALEUP 100

**UMERAH AKRAM**

Head of Elite UK & International

**RACHEL SCHONWALD**

Director of Product Marketing, Zirra

**ALBERTO ONETTI**

Chairman, Mind the Bridge



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## SEP SCALEUP SUMMIT

# SEP ELITE TECH SCALEUP 100

is the ranking of the **top 100** tech European Scaleups

Inclusion in the ranking based on an algorithm that factors:

- **capital raised** by the company since inception
- **qualitative parameters** (employee growth, competitive position, IP and trademarks, traffic growth, sentiment analysis and M&A activity), analyzed in partnership with **Zirra**

The weight of the qualitative component to be increased over time, as more parameters are added and data is collected, increasing the accuracy and training of the AI models

*Companies interested in getting a more comprehensive valuation can provide further information by completing the ELITE Growth Compass*

## PIPELINE

SEP ELITE  
TECH SCALEUP 250

SEP ELITE  
TECH SCALEUP 500

SEP ELITE  
TECH SCALEUP 1000

# SEP SCALEUP SUMMIT

Produced by



## SEP ELITE TECH SCALEUP 100

- |   |   |                      |                      |  |
|---|---|----------------------|----------------------|--|
| 1 |    | <b>Spotify</b>       | <i>Digital Media</i> |   |
| 2 |    | <b>Delivery Hero</b> | <i>Mobility</i>      |   |
| 3 |   | <b>IHS Markit</b>    | <i>Fintech</i>       |  |
| 4 |  | <b>Zalando</b>       | <i>Fashiontech</i>   |  |
| 5 |  | <b>AUTO1 Group</b>   | <i>Autotech</i>      |  |
| 6 |  | <b>Just Eat</b>      | <i>Mobility</i>      |  |



# SEP SCALEUP SUMMIT

**BUDAPEST** | Budapest Stock Exchange  
October 4-5

**BALÁSZ BOZSIK**

Head of Sales and Marketing, Budapest Stock Exchange



Organized by:





# STARTUP EUROPE comes to SILICON VALLEY



**SEC2SV 2018**  
SEPTEMBER 9-15, 2018



[www.sec2sv.com](http://www.sec2sv.com)

Startup  
Europe  
Partnership

STARTUP  
EUROPE



# SEP SCALEUP SUMMIT

**LONDON** | London Stock Exchange | June 28-29

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SEP SCALEUP SUMMIT

# NETWORKING LUNCH

