

SEP Scaleup Summit | Milan

Deep Dive | Industry 4.0



Mind the Bridge

Outlines

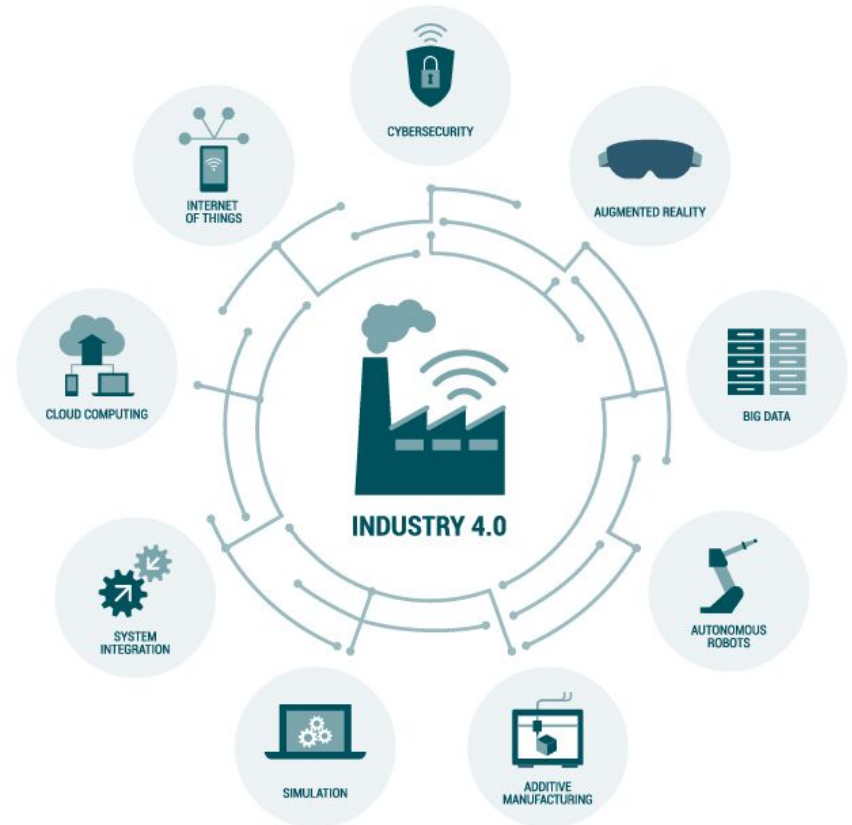
- Industrie 4.0, What Are We Talking About?
- Funding and M&A overview
- Startup Players



What Are We Talking About?

Smart Factories”, “Smart Manufacturing”, Industry 4.0...

- **Fully-integrated**
- **Collaborative manufacturing** systems
- **Real time** to meet **changing demands and conditions**
 - in the factory,
 - in the supply network,
 - and in customer needs.



Data

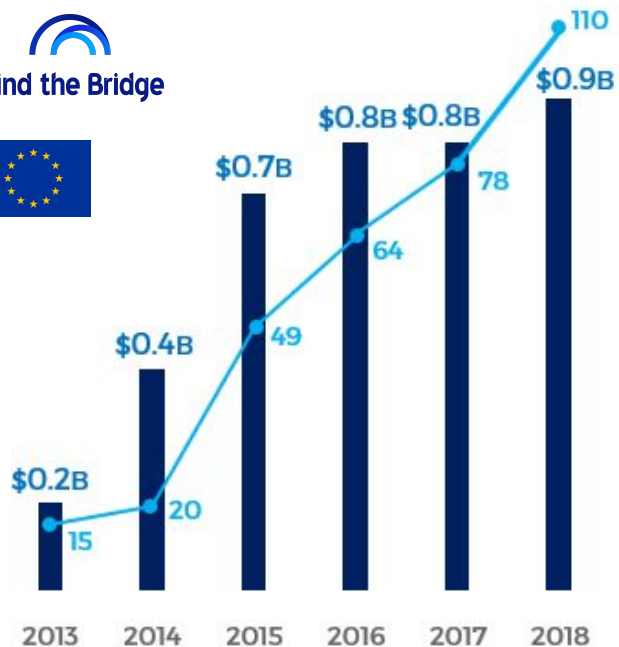
The Main Common Denominator

⇒ The future of industry and manufacturing is **digital**.



A Maturing Space

Funding Amount and M&A are Booming



■ Capital raised per year
● Number of Scaleups per last funding year



IIoT quarterly global financing history

Q1'13 - Q1'18



CBINSIGHTS

A Maturing Space

Funding Amount and M&A are Booming

- **368** Scaleups in Europe, **\$4.5B** in Capital Raised

- 30 IIoT exits in H1 2018, record year for exits?

- Interesting collaboration to watch



relayr.



SIEMENS

A Crowded Landscape

Players Bringing Digitization to Heavy Industry

