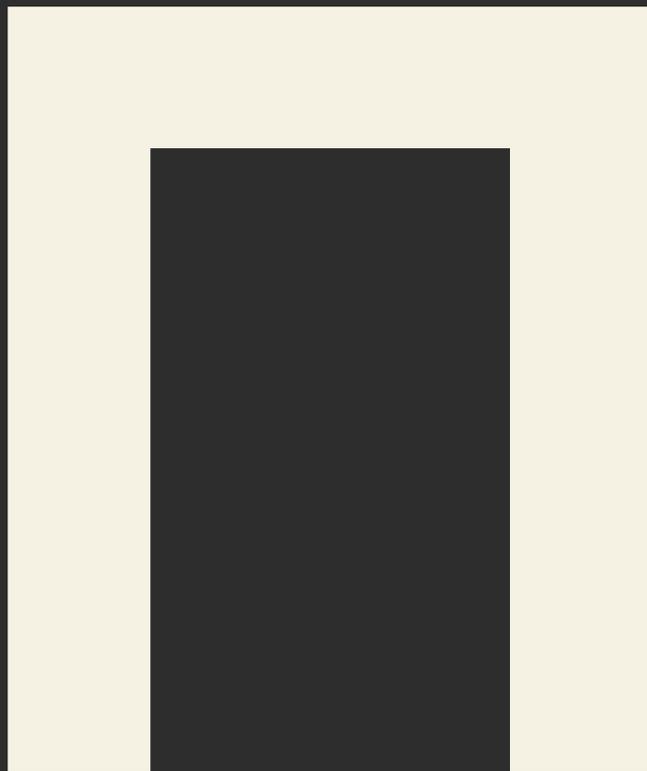


techleap.nl

Empowering Dutch Leaders in Tech 2020 Action Plan



techleap.nl

Techleap.nl is a non-profit organisation, funded by the Ministry of Economic Affairs and Climate Policy, helping to quantify and accelerate the tech ecosystem of the Netherlands. Empowering Dutch leaders in tech to scale with programs and initiatives for improving access to technology, market, capital and talent. Special Envoy for Techleap.nl is Constantijn van Oranje.

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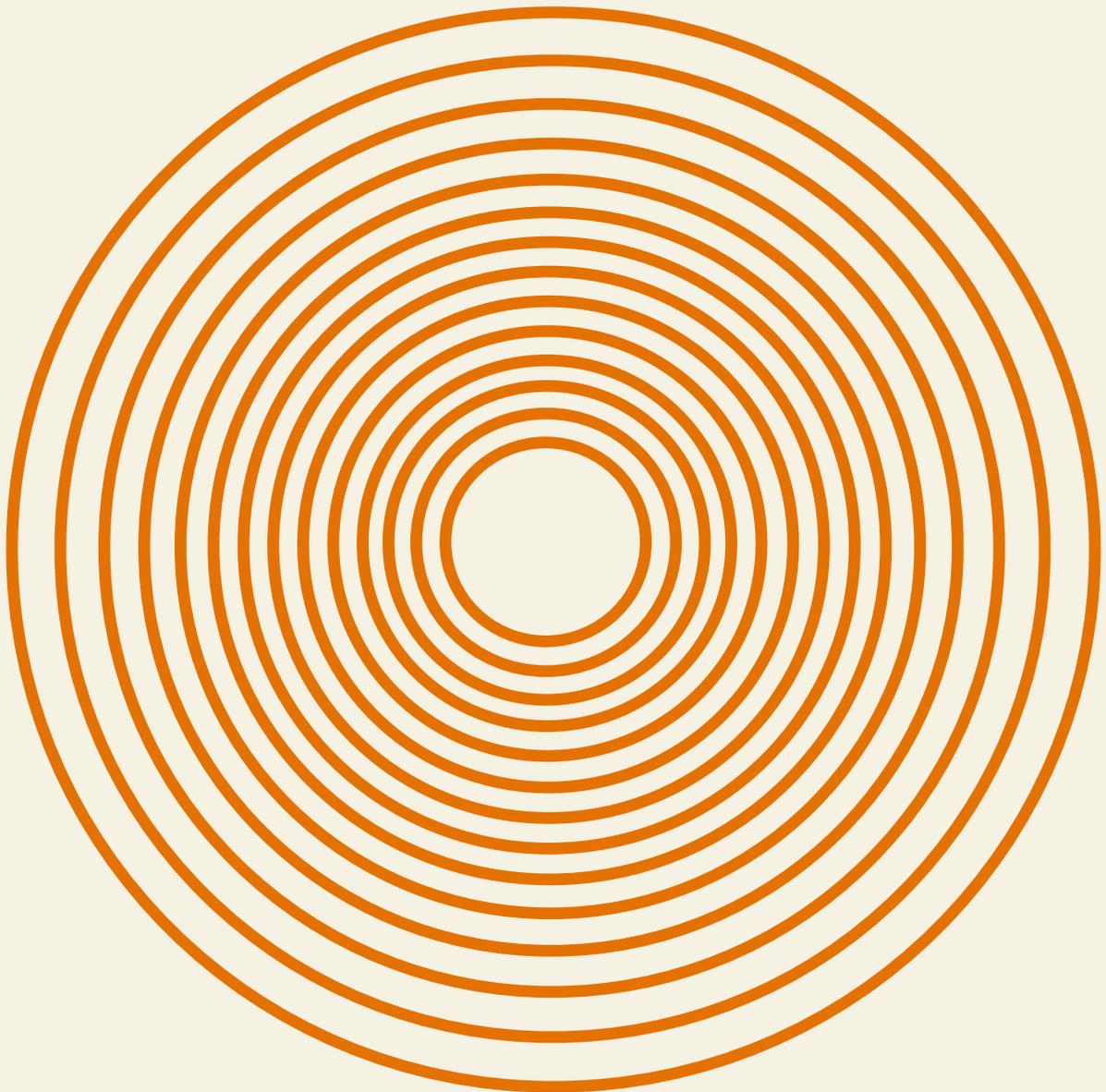
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Empowering
Dutch leaders in tech,
but why?



1. Introduction

Techleap.nl aims to empower tech leaders in the Netherlands. This is why.

The Netherlands is a resilient, progressive country that has continually used innovation to respond to the local and global challenges of the time. From creating our own land and keeping the sea at bay to establishing the first stock exchange and pioneering technologies such as WI-FI, Bluetooth and lab-grown meat, the Dutch culture of innovation is impressive and well established. It serves a deep purpose to ensure that citizens are happy, safe and free to develop their talents and explore what they are most passionate about.

Technology may be the key to the future, but it's the people behind it who innovate and unlock opportunity. The bright minds, the innovators and the changemakers. They deserve our support to rise to today's challenges – which are presented to us at a rate faster than we've ever seen before. That's why we want to empower them with an ecosystem for innovation, to ensure the Netherlands stays an innovation leader with a competitive and relevant economy and a global impact.

2. The Challenge

To overcome our disadvantages and improve the access to technology, markets, capital and talent.

The Challenge

We have identified five things we need to fix to empower tech leaders to futureproof the Netherlands and create the platform to scale innovations: insufficient availability of capital, a small talent pool and a homogeneous startup sector, insufficient market access and the gap between technology and new businesses.

The Netherlands currently leads in many international rankings¹ due to past achievements in areas such as infrastructure, stable institutions and regulatory frameworks. The country seems to be well placed to remain an innovation leader. However, a closer look at the rankings and benchmarks reveals a less positive picture. The Netherlands lags behind in investing in areas that are central for future innovation². The main areas of concern are the speed of embedding technology, access to markets, capital, talent and the ability to scale successfully.

We mapped indicators which determine success factors for empowering future tech leaders along twelve axes (see Fig 1. spider diagram below). The diagram shows the 2019 benchmark. It compares the state of the Dutch ecosystem to the best ecosystems in Europe, pinpointing the areas of concern and level of improvement required. This picture is indicative of the challenge, however it is static.

European ecosystems are evolving rapidly. Technological developments including artificial Intelligence, genomics, robotics, photonics and quantum computing are progressing at lightning speed worldwide. New business models disrupt old markets and global tech companies start to dominate the market. Upcoming and emerging economies become new growth markets and access to their extensive pools of talent creates global competition.

1 | World Economic Forum's Global Competitiveness Index, World Intellectual Property Organization's Global Innovation Index and the Financieel Dagblad's Innovation Ranking.

2 | https://app.dealroom.co/heatmaps/funding/topics/deep_tech/countries

Knowing this, we realise the need to reach even further to achieve our desired outcomes in 2023 and beyond. All Techleap.nl activities are focused on moving the needle in a positive direction on the twelve determining success factors. To continuously accelerate the impact of Techleap.nl, we will match our actions with findings about the potential scale of sectors, markets and/or technologies. In this way, we will be able to prioritise and focus our efforts on the sectors, markets and technologies that are most promising and which add the highest economic and societal value for the Netherlands.

This is our challenge.

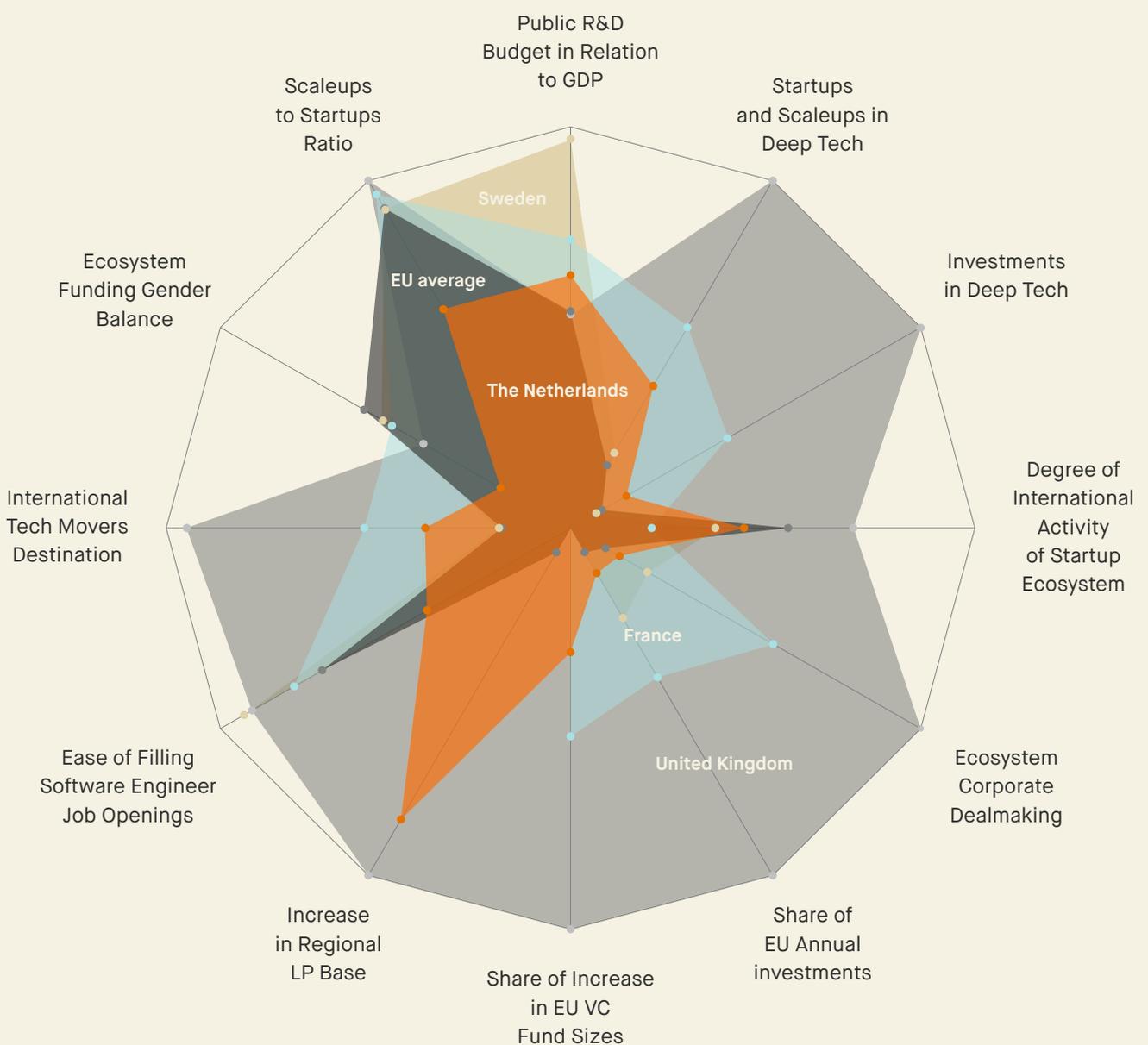


Figure 1
Factors that impact success in tech ecosystems across Europe

Key Domain Indicators

Technology

- Public R&D Budget in Relation to GDP ³
- Startups and Scaleups in Deep Tech ⁴
- Investments in Deep Tech ⁴

Markets

- Degree of International Activity of Startup Ecosystem ⁵
- Ecosystem Corporate Dealmaking ⁴

Capital

- Share of EU Annual Investments ⁴
- Share of Increase in EU VC Fund Sizes ⁶
- Increase in Regional LP Base ⁵

Talent

- Ease of Filling Software Engineer Job Openings ⁷
- International Tech Movers Destination ⁷
- Ecosystem Funding Gender Balance ⁴

Scale

- Scaleups to Startups Ratio ⁴

3 | UNESCO, 'How Much Does Your Country Invest in R&D?'

4 | Dealroom.co, 2019

5 | Genome, 'Global Startup Ecosystem Rankings 2019'

6 | Invest Europe, 2018

7 | Atomico, 'State of European Tech 2018'

3. Our Approach

We create the optimal climate for people and their companies to scale.



Our Approach

To meet the challenge described in chapter two, Techleap.nl will quantify and accelerate the development of the ecosystem, empower people and creating the optimal climate for tech companies to scale with programs and initiatives for improving access to technology, markets, capital and talent. This defines our approach for 2020 and beyond.



We empower leaders in tech

We will empower (upcoming) leaders in tech to make their mark on the world. In all we do, we will emphasise diversity and inclusion and also encourage others to do so.

We quantify

We gather insights, data and research to find and understand the challenges the ecosystem faces, before we launch a program. We create and share knowledge as the basis of our work by revealing insights about the tech ecosystem through our 'Finder' and reports.

We accelerate

We accelerate the growth of the ecosystem by sharing knowledge and plugging gaps with new programs and initiatives across technology, markets, capital and talent needs. When possible and fully within our control, we will take the lead. In other cases we'll serve as a facilitator to boost progress, based on robust, validated research and connections.

We know the tech leaders best

We aim to know all potential, future tech leaders in the Netherlands and understand the founders' business needs. We use this knowledge to connect founders and stakeholders to whoever is relevant in supporting their growth as a scaleup.

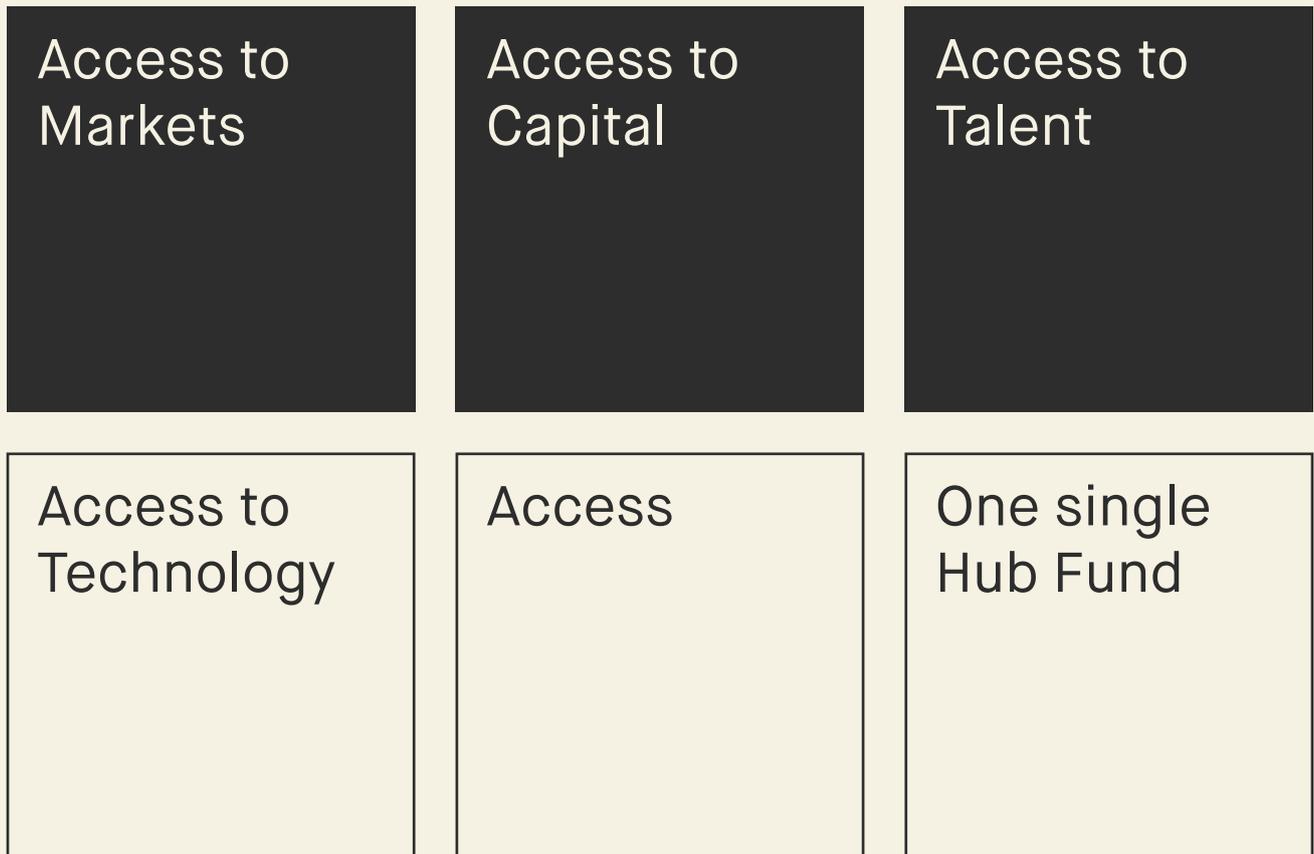
We act as one single hub

We collaborate with regional innovation partners and act as the connector providing one single hub. We know that when we join forces and empower tomorrow's tech leaders together, the Netherlands has the best chance of success.

We partner with the government

We act as knowledge partner for the government on issues that could either accelerate or slow down the impact of tech innovators in the Dutch economy and society. We will challenge governments to create an internationally competitive environment for disruptive business. Intervening when regulations hinder the scaling of these companies and taking appropriate action. We monitor the startup policy agenda together and keep it up to date.

Our Domains & Programs



Our approach covers the following core domains and programs to build capacity and success: Access to Markets, Access to Capital, Access to Talent, and two defined programs aimed at innovation in business (Access to Technology) and scaling (Access). The approach is strengthened by the close link with the One Single Hub Fund.

Access to Technology

We accelerate embedding technologies in the ecosystem and empower the innovation ecosystem players – talent, corporates, investors, knowledge institutions and government – to turn ideas and technology into new goods and services.

Access to Markets

We build, together with relevant partners, the most connected and supportive ecosystem across the globe, making the Netherlands the ideal stepping stone for fast acceleration.

Access to Capital

We want to ensure that startups and scaleups based in the Netherlands get access to the best possible investors and funds in an optimal, aligned process to help them start, grow and scale.

Access to Talent

We provide scaleups based in the Netherlands with all the tools and knowledge to recruit, retain and develop the best talent to grow and scale internationally.

Access

We identify the Dutch scaleups with the highest potential for success and accelerate their growth by providing access to new markets, funding and talent.

One single Hub Fund⁸

Programs and initiatives in the Netherlands that contribute to the ambition of empowering tech leaders in the Netherlands can apply for a one-time financial injection to accelerate their impact.

8 | The One Single Hub Fund is part of the startup policy of the ministry of Economic Affairs and Climate Policy and has a link with the Techleap.nl program.

Company Growth Stage

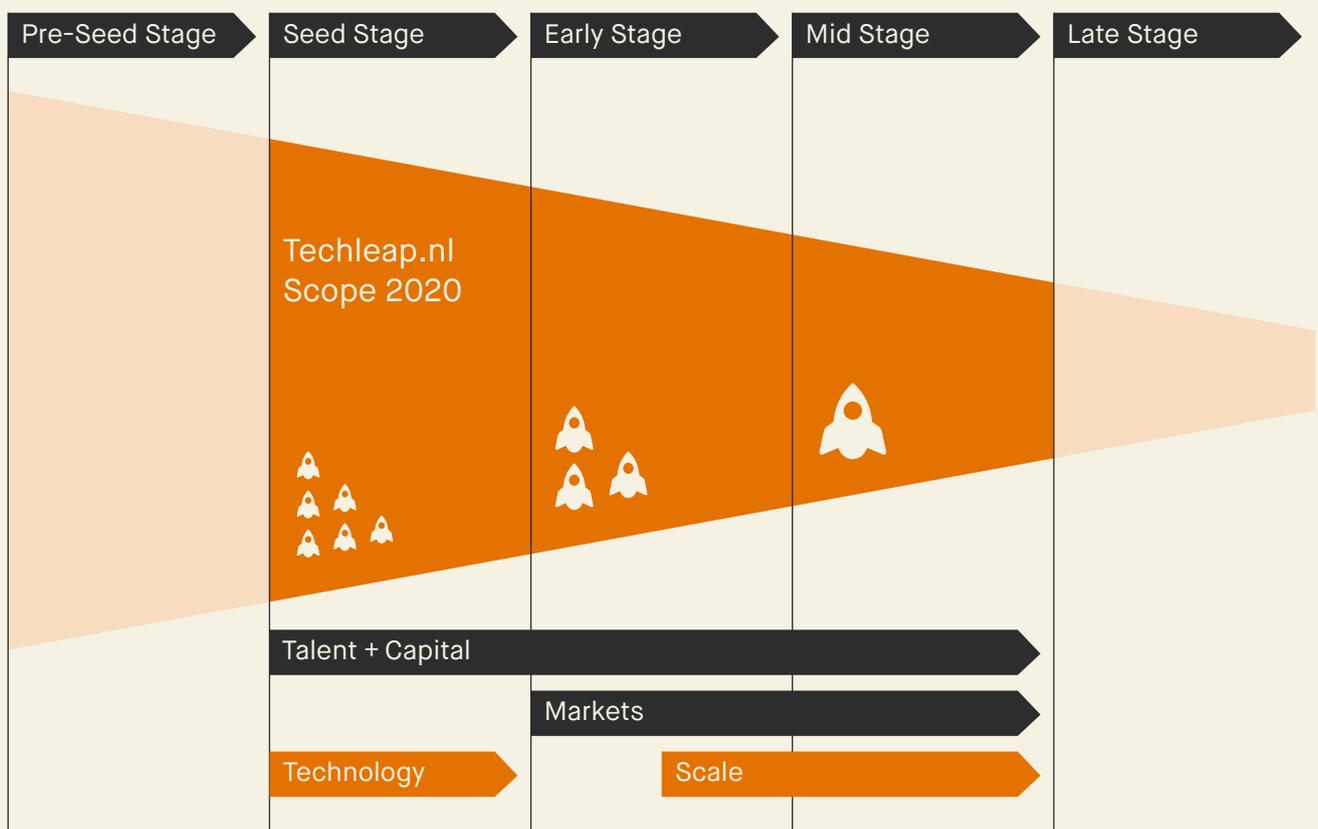


Figure 2

Techleap.nl's approach to supporting startups and scaleups

Execution Highway

We are ambitious. Our domains, programs and the fund aim high and we expect to explore unexplored paths along the way. We will always start with insights and ideas. In the exploration phase, we will use data to determine whether an idea is viable before converting it into a pilot to test interventions. We will execute ideas when results are positive, change or stop when they are not what we hoped for, and share lessons learned and best practices along the way.

We will act as an accelerator when needed. We will join forces to build a competitive ecosystem for startups and scaleups, sector agnostic. Despite the fact that the growth paths of startups and scaleups are not uniform, and depending on the sector or technology, the need for access to technology, markets, capital and talent binds them all.

Therefore, from day one we will put our efforts on building an excellent ecosystem that facilitates the scaling of tech companies in general. Researching and monitoring the effects of our interventions and others will allow us to continuously accelerate the impact of the Techleap.nl approach.

We will also match our actions with findings about the scaling potential of different sectors, markets or technologies. In this way, we will be able to focus our efforts on the sectors, markets or technologies that are most promising and will add most economic and societal value for the Netherlands.

With these domains, programs and this fund, we aim for the moon and therefore will explore unexplored paths.

Execution Highway

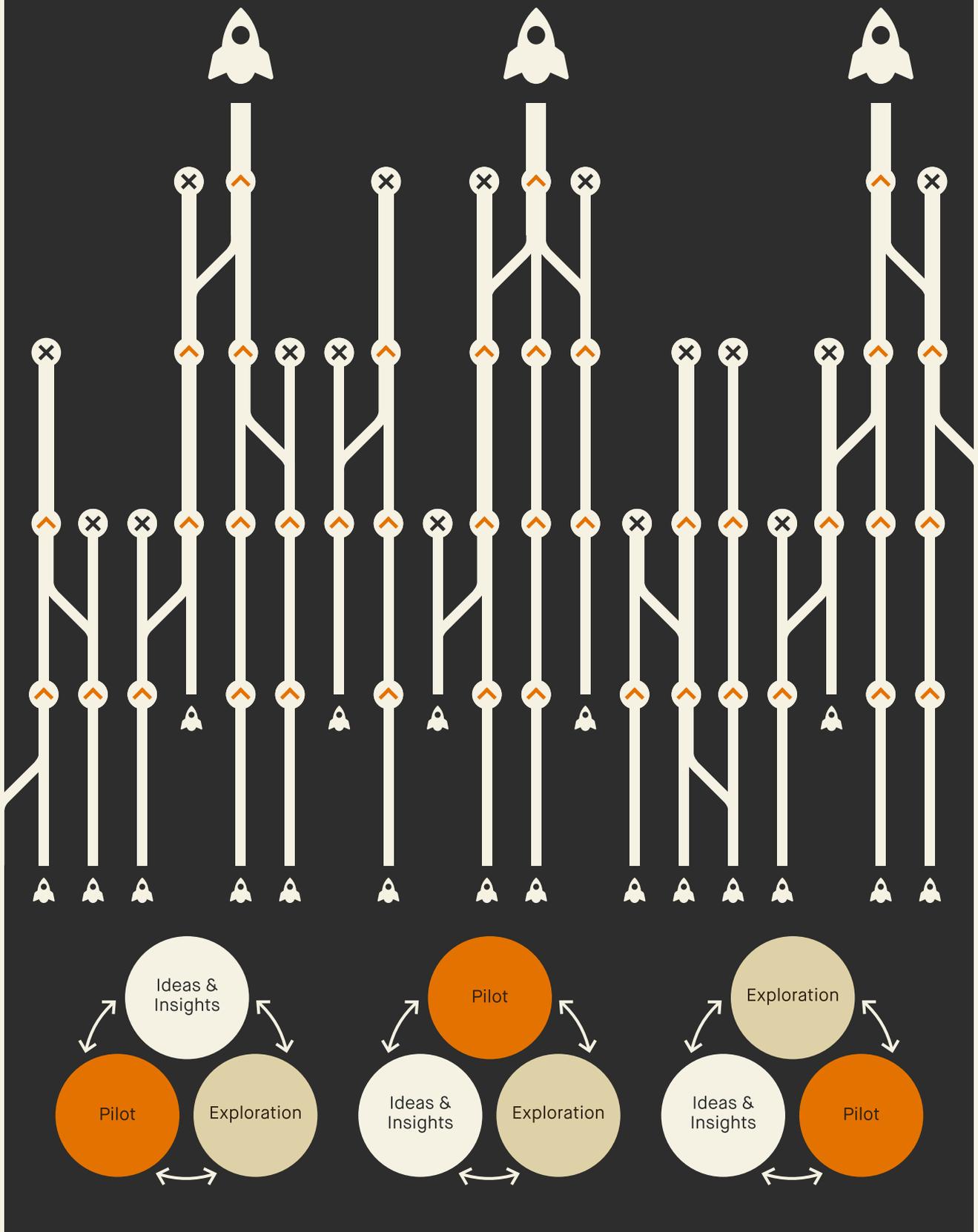


Figure 3
Techleap.nl's Execution Highway

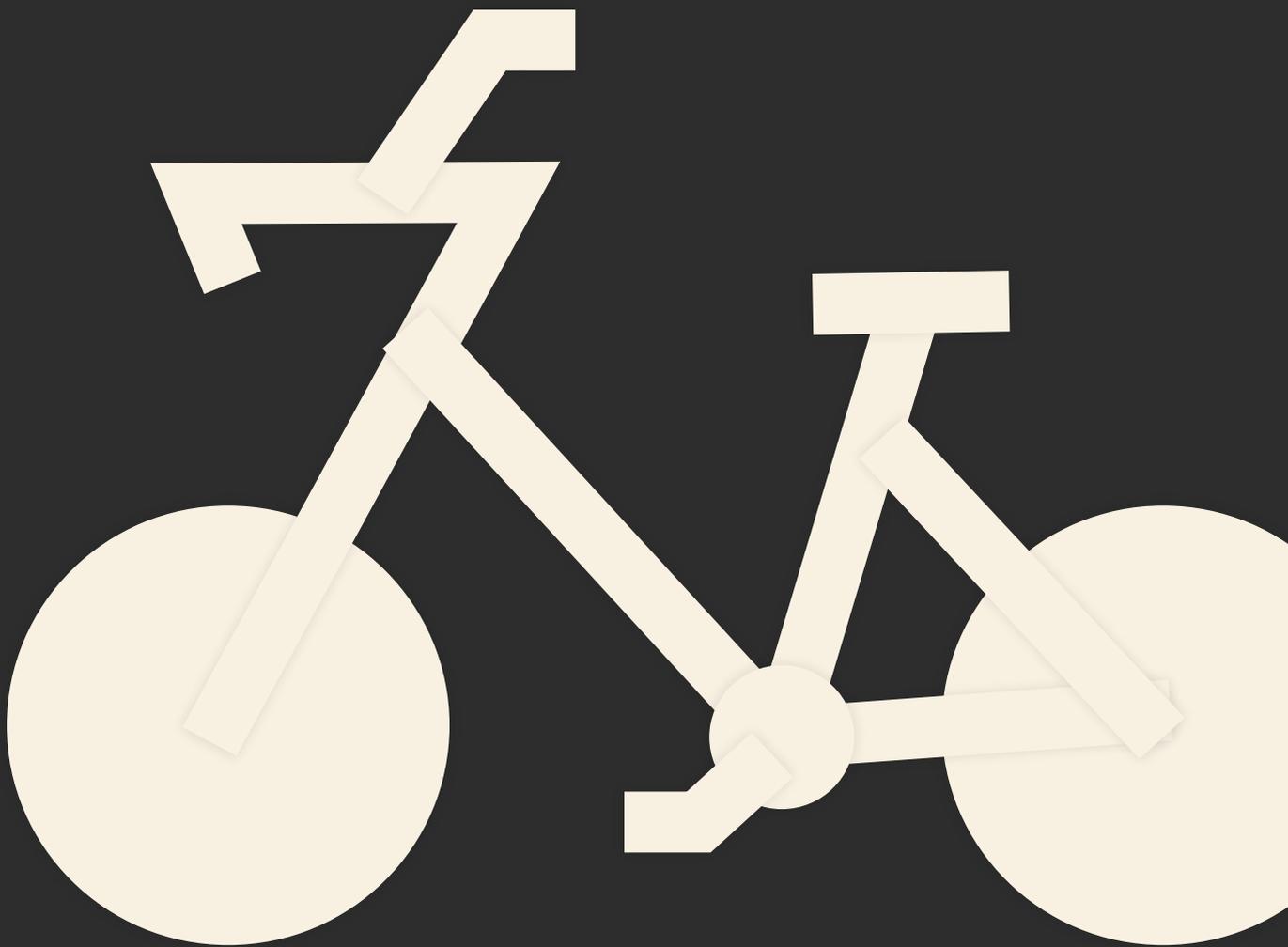
Our goal for 2023

With this mindset, approach, domains and programs, we aim to achieve the following objectives by the end of 2023:

Access to Technology	Double the amount of startups and scaleups in deep tech in 2023 (1290 today).
Access to Markets	Increase the amount of Dutch scaleups with international success (according to our classification) by 15% and increase the amount of annual corporate venture deals by 50%.
Access to Capital	Multiply currently available venture investment capital by 10 and achieve through public/private funding a yearly funding of 10Bn for tech scaleups.
Access to Talent	Lower the percentage of hard to fill software development vacancies in the Netherlands by 25% and provide easy access for scaleups to diverse tech talent.
Access	250 scaleups accelerated.

Crucial for success is the collaboration of the Dutch ecosystem and the willingness of many to go that extra mile. We see it as our assignment to be the driver, connector, inspirer and expert partner that nurtures stakeholders with data, best practices, case studies and suggestions to contribute more significantly to the success of the Dutch ecosystem.

Access to Technology



Access to Technology

With Access to Technology we will accelerate the embedding of technologies in the ecosystem and empower the innovation players (talent, corporates, investors, knowledge institutions, government) to turn ideas and technology into new goods and services.

9 | Deep tech includes: Technology & Computer Vision, Artificial Intelligence & Machine learning, Augmented reality & Virtual Reality, Autonomous Driving, Blockchain, Connected Device & Sensors Technology, Nanotech & Quantum technologies, Recognition Technology, Drone, Robotics & IoT.

Key indicators Access to Technology

Public
R&D Budget
in Relation
to GDP

Startups
and scaleups
in Deep Tech⁹

Investments
in Deep Tech

The innovation ecosystem is one of the main indicators of success for remaining internationally competitive. Interestingly, the Netherlands has contradictory trends in the two indicators defining a global competitive ecosystem. The Netherlands is moving up the rankings in business dynamics, but moving down in the international rankings in innovation capabilities. This is an alarming trend for the competitiveness of the country in the near future.

There are many technological solutions within reach for our economic growth and societal challenges. For a country to reach maximum impact, serious investments from the government, as well as the private sector, in R&D and commercialisation of technology are needed. But the competition with other countries in which governments are actively investing in R&D and commercialization of technology has never been so strong.

The huge amounts invested in technologies by countries such as the United States and China – as well as neighbouring countries such as Germany and France – are difficult to match. The Netherlands can only continue to lead the way in a number of technological areas and through its ecosystem by making targeted choices and investing wisely in crucial technologies and collaborations between entrepreneurs and technology. This requires an ecosystem that is willing to prioritize and act. Techleap.nl will accelerate this change in collaboration with others. To fully embed technologies in the ecosystem by entrepreneurship, access to markets, capital and talent is needed.

Road to Success

The Access to Technology program will tap into the Techleap.nl domains for markets, capital and talent from the viewpoint of breakthrough technology challenges and academic startups (not a domain itself). The approach will be evaluated after a year on the basis of the impact we have made with our ecosystem partners. Our task for the upcoming year is to identify, address and accelerate the initiatives that already exist in the fields of access for key enabling technologies and the acceleration and scaling of breakthrough technologies. We do that by:

Quantifying the technology landscape

Currently, the overall technology landscape lacks consistent, relevant data. To establish collaborative goals, and spot bottlenecks it is essential to gather more data and analysis. Better metrics and analysis will help us identify winning strategies and useful timelines, especially on the following topics; quantity and quality of formal research and development; ecosystem collaboration; the capacity of academic founders to turn ideas into new goods and services, and the funding of these ideas.

Identifying and accelerating key collaborations

Within the ecosystem programs and projects are being initiated that support startups in getting better access to markets, capital and talent and embedding breakthrough technology in the ecosystem. Several 'young' ecosystems are being kickstarted around areas such as hydrogen, photonics, carbon and quantum. More developed technologies such as artificial intelligence and blockchain are actively being boosted, through entrepreneurship, to create more impact in the national and international markets.

Initiatives from the ecosystem that boost entrepreneurship and are supported by more than two ecosystem players in a breakthrough technology can apply for an acceleration boost through the Access to Technology program.

Current collaborations we've identified are:

Kickstart.AI

To ensure this private collaboration is embedded in the ecosystem, Techleap.nl will act as an ecosystem partner. Kickstart.AI was founded in 2019 by five Dutch companies: Ahold Delhaize, ING, KLM, Philips and NS. They decided, in collaboration with Techleap.nl and ICAI, to boost AI in the Netherlands by promoting and accelerating the development of AI-technology and stimulating AI talent in the country.

Road to Success

Quantifying
the technology
landscape

Identifying and
accelerating key
collaborations

Dutch AI Coalition

In 2019, more than 65 companies, civil society organisations and research institutes launched the Dutch AI Coalition. The parties, including MKB-Nederland and VNO-NCW, want the Netherlands to become a major player in the field of artificial intelligence (AI). Techleap.nl will take the lead of the startup/scaleup working group of this AI Coalition.

Acting as a knowledge partner to government and universities

To create an ecosystem where companies can successfully adopt a technology and scale or build a company on a technology, knowledge sharing and collaboration within the ecosystem is key. Techleap.nl will act as a knowledge partner to government and universities, two pivotal players in the ecosystem involved in key technologies. We will ensure the scaleup perspective in developing key technologies and bringing them to market.

Since 2015, tech transfer was an important part of StartupDelta's agenda (the former Techleap.nl entity). This led to significant growth in awareness of the importance of tech transfer in Dutch Universities. Specifically, this led to a strategy commitment by VSNU to become the fastest growing tech transfer ecosystem in Europe. Techleap.nl will continue to support this vision and the acceleration of tech transfer by showcasing best practices and connecting relevant parties within the ecosystem. We will act as a knowledge partner with all the ministries involved in bringing technology to the market more quickly and contribute to National Technology Strategies (AI, Quantum, Blockchain, etc.) from the startup/scaleup perspective.

In doing that, we ensure that bottlenecks and barriers to growth are taken into account in the specific technology policy vision. Next to that, we encourage more collaboration and networking, accelerating the business development of academic spin offs. The first step in connecting non-academic parties and academia is to know where to find relevant Dutch academic expertise for projects and create access to these collaborations.

To accelerate the business development of Academic spin-offs, Techleap.nl will monitor the IP-structures between universities and their spin-offs and any barriers and bottlenecks they may face. A first focus on IP-structures has been chosen because qualitative studies from previous years have shown that current IP-practices are the number one reason limiting growth and market investment for a significant number of spin-offs.

Acting as a
knowledge partner
to the government
and universities

Visibility of academic technologies

Together with IDfuse StartupDelta initiated the ScienceFinder in 2019. The ScienceFinder combs through 26157 publications, 69498 projects and 139 startups to find the right expert for non-academic partners from industry and government. Techleap.nl will use the data to do research into knowledge transfer and publish reports on that basis. Along with reports and communication Techleap.nl will support it's further development in order to make the ScienceFinder 'the' tool to find technology and in that way accelerate knowledge transfer and strengthen the connectedness within the ecosystem.

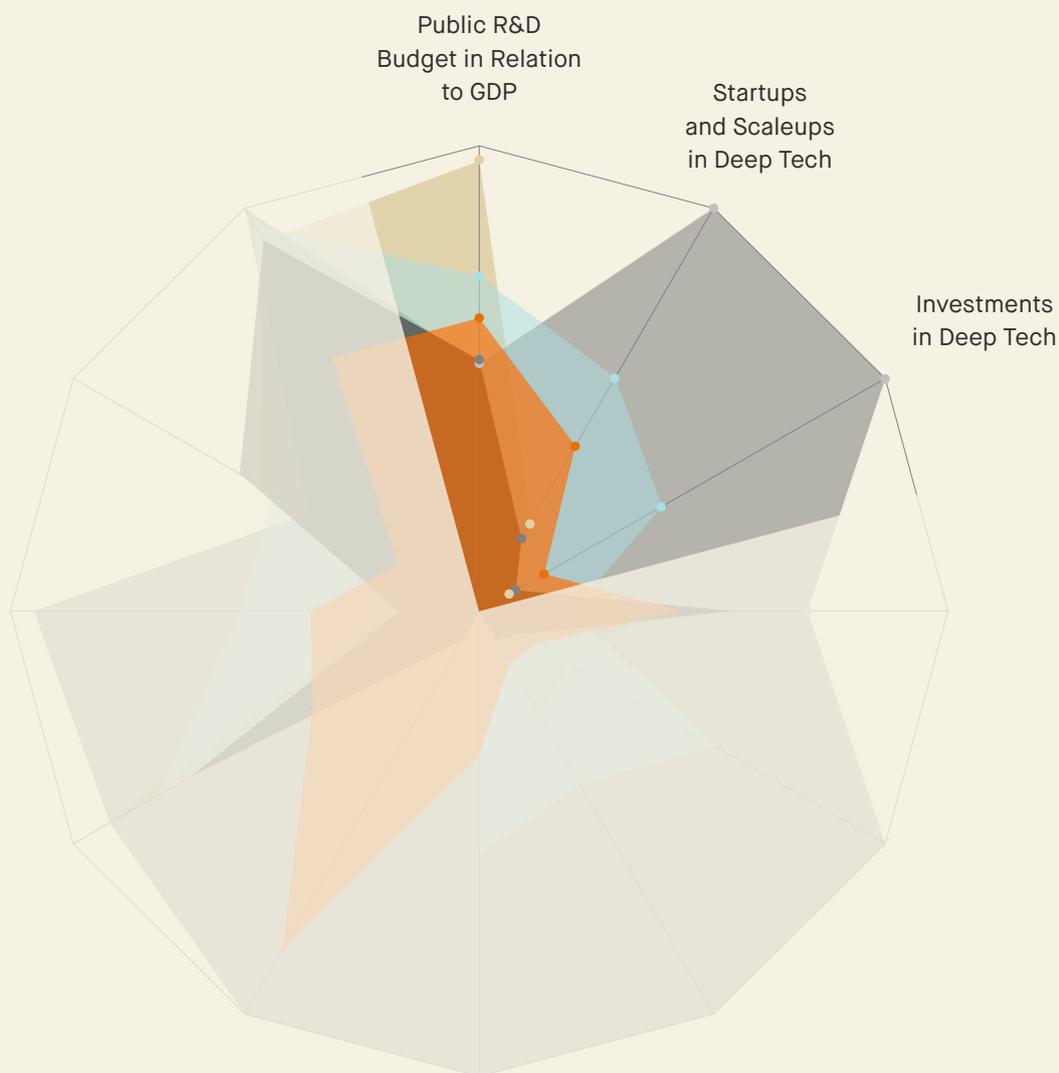
Academic startup competition

The Academic startup competition was founded in collaboration with the VSNU to accelerate technology into business. The competition offers academic startups the chance to showcase to a large audience of international investors and businesses. To grow this competition and accelerate the growth and scalability of Academic startups, the VSNU and Techleap.nl will adapt the current model. Using lessons learned from the Creative Destruction Lab concept – a Toronto based program for seed-stage, science-based startups that have the potential to scale into massive companies – Techleap.nl and VSNU will aim for 30 spin-offs to take into the scaleup phase.

Visibility
of academic
technologies

Academic
startup
competition

Vision 2023



The vision for the Access to Technology program is to accelerate the ecosystem by the embedding of breakthrough technologies through the doubling of startups in deep tech by 2023.

This translates into the following KPIs for 2023:

- 2,500 startups and scaleups in deep tech in 2023 (today 1290).
- €1.35 billion invested in deep tech by the year 2023 (today €470M).
- 3.1% of GDP as public R&D budget in 2023 (today 2%).
- An increase in the number of spin-offs in the Netherlands (ntb. based on research).

Figure 4
**Access to Technology
KPIs 2023**

- Netherlands
- United Kingdom
- Sweden
- France
- EU Average

Actions 2020

Quantifying the technology landscape

- Collecting data for the following pillars: quantity and quality of formal research and development; ecosystem collaboration; the capacity of academic startups to turn ideas into new goods and services.

Identifying and accelerating key collaborations, successfully pulling in companies, government and scientific institutes, like Kickstart AI and AI Coalition

- Techleap.nl will act as an ecosystem partner for Kickstart.AI.
- Techleap.nl will take the lead in the Scale up/Startup working group of the Dutch AI Coalition.
- Identify other key collaboration to support either operationally or as a knowledge partner.

Acting as a knowledge partner to the government and universities

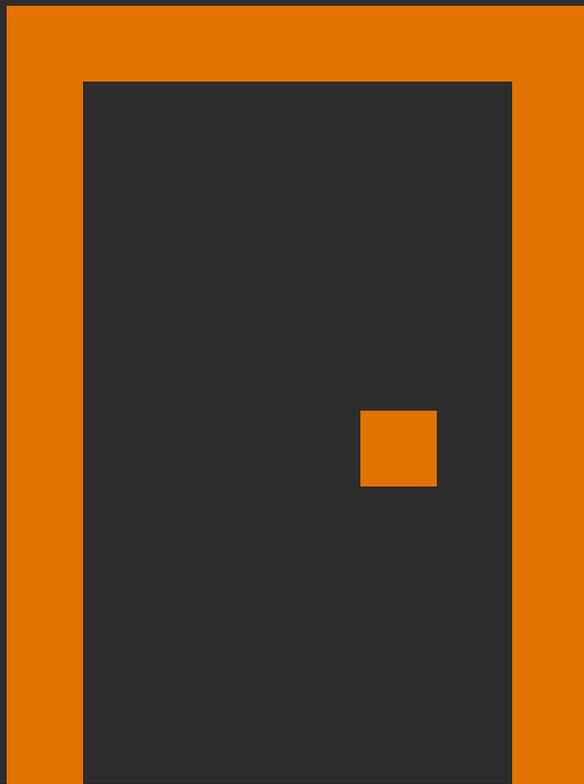
- Present best practices internationally, network introductions, present benefits of tech transfer to market (universities).
- Advise on and present best practices and data reporting to support growth of the scaleup community (government).
- Contribute to National Technology Strategies (AI, quantum, blockchain, etc.).

Accelerating the business development of Academic spin-offs

- Identify bottlenecks and barriers to growth and advise or support action plans to limit these.
- 8 Reports from the ScienceFinder published.
- 1 Academic startup competition organized with first mentor approach tested, handover full ownership of the Academic startup competition to VSNU or new identified partner selected by both parties.
- 30 Spin-offs in the scaleup phase.

5. Action Plan 2020

Access to Markets



Access to Markets

Through Access to markets, Techleap.nl wants the Netherlands to be the best connected ecosystem across the globe, making our country the ideal stepping stone for the acceleration of future Dutch tech leaders, nationally and internationally.

Key indicators Access to Markets

Degree of
International
Activity of
Startup
Ecosystem

Quality of
Local Sup-
port and Eco-
system Con-
nectedness

According to a 2019 Techleap.nl research in collaboration with McKinsey,¹⁰ 'internationalisation' was indicated as the biggest challenge by founders from mid-stage scaleups (between €1M – €5M revenues). The Startup Genome 2018 report, based on the world's largest research on key success factors for startup growth, shows 'market reach' as one of the biggest disadvantages for the Dutch tech ecosystem.

Access to international buyers, local partners and local talent are three of the biggest internationalisation challenges for scaleups, according to the 2019 Annual ScaleUp review from the ScaleUp Institute.¹¹ Well-trusted international angel investors and VCs are often effective partners for internationalisation due to their deep network and knowledge of their local market. In our internationalisation support efforts, it will therefore be critical to work closely with the capital domain.

Besides the challenges around internationalisation, we will focus on access to the Dutch market. Corporates and government can play a critical role in accelerating growth because of their purchasing power and reliable references. In addition, various multinationals are starting impactful corporate venture funds or launching innovation programs like Cumulus Park (ING), Chemelot (DSM), HealthWorks (Philips), Booster (Booking.com) and Next Energy (Shell). Besides these great and important steps forward, there is still a tremendous leap to take. At most multinationals, the sales procurement process is still unnecessarily complex for scaleups. Buyers aren't empowered by their organisations to experiment and outdated procurement processes slow down innovation.

10 | McKinsey & Company: Techleap.nl – Accelerating Dutch startups sep 2019.

11 | ScaleUp Institute is a private funded, not-for-profit company focused on making the UK the best place in the world to scale up a business www.scaleupinstitute.org.uk/scaleup-review/

Road to Success

To enable easier access to buyers, partners, and go-to-market knowledge with the ambition to host one of the highest amounts of scaleups with international success, Techleap.nl will focus the next 3.5 years on five areas. These are closely intertwined and will make the Dutch ecosystem the ideal stepping stone for fast acceleration, nationally and internationally.

Geo-specialist network

We will build a solid, smart and connected network of tech entrepreneurs, investors, industry captains and specialists. The network will have high engagement leading to hundreds of game-changing introductions within the next 3 years. To get there, we need to find out what already exists and research best practices from the most effective international networks.

Together with regional hubs and the startup liaisons in our priority hubs, we will be mapping and connecting existing local communities to get scaleups plugged into the ecosystems and foster a global network that reaches more than 20 cities and 500 mentors, across various sectors, who have all signed up for our joint mission. The global network should also contribute to the shared objective with the capital domain to get more exposure to International VCs (see chapter 6).

Tech missions: demand-driven and sector-specific roadshows and conference tours

Together with our partners in the Dutch tech ecosystem, we want to ensure a coherent international agenda when it comes to trade missions. In this new world, where time and climate are demanding a more action-oriented approach, we want to ensure programs are tailored to the needs of participating startups and scaleups and consist of services from preparation to evaluation. It will be a continuous process of testing, measuring and iterating to make sure that we invest our resources in those sectors, regions, and programs that are most effective for scaleups.

International accelerator programs

We will support international acceleration through the network of other credible, international expansion acceleration partners and programs. This requires in-depth qualification, certification and experimentation to ensure the quality of the support. Once certified, we will ensure these preferred partners are more accessible.

Road to Success

Geo-specialist network

Tech missions: demand-driven and sector-specific roadshows and conference tours

International accelerator programs

Teams entering Y-Combinator, the famous American seed accelerator, are more successful than the average startup. That's why, in collaboration with Dutch Y-Combinator alumni, we want to increase the amount of applications and acceptances for some of the very best scaleups in the Netherlands.

International expansion knowledge hub

Information and experiences about international expansion are scattered and varied. We want to drive a scalable way to share knowledge in order to help startups and scaleups in their internationalisation efforts.

From maturity scans to assessing whether scaleups are ready for international expansion, to decision-making resources for target markets, access to knowledge tools and a robust network, our aim is to make the expansion itself as seamless as possible. We will explore, together with the ecosystem, how we can realize this, making use of all the existing tools and resources. Amongst others, our goal is to create sector specific playbooks providing a thorough analysis of markets and go-to-market insights, all to provide guidance for fast expansion at scale.

Connecting Dutch enterprises to the power of startups and scaleups

We want to develop a shared perspective on improved collaboration opportunities with enterprises and scaleups. This will be backed by benchmarks and lessons learned from other countries and regional successes. It will be developed together with various existing partners and initiatives.

Initiatives will be organized to assess collaboration models to increase the engagement between enterprises, startups and scaleups. This will create opportunities, address the need for more seamless sales trajectories and establish long-lasting partnerships beyond the pilot.

Governmental affairs related to markets

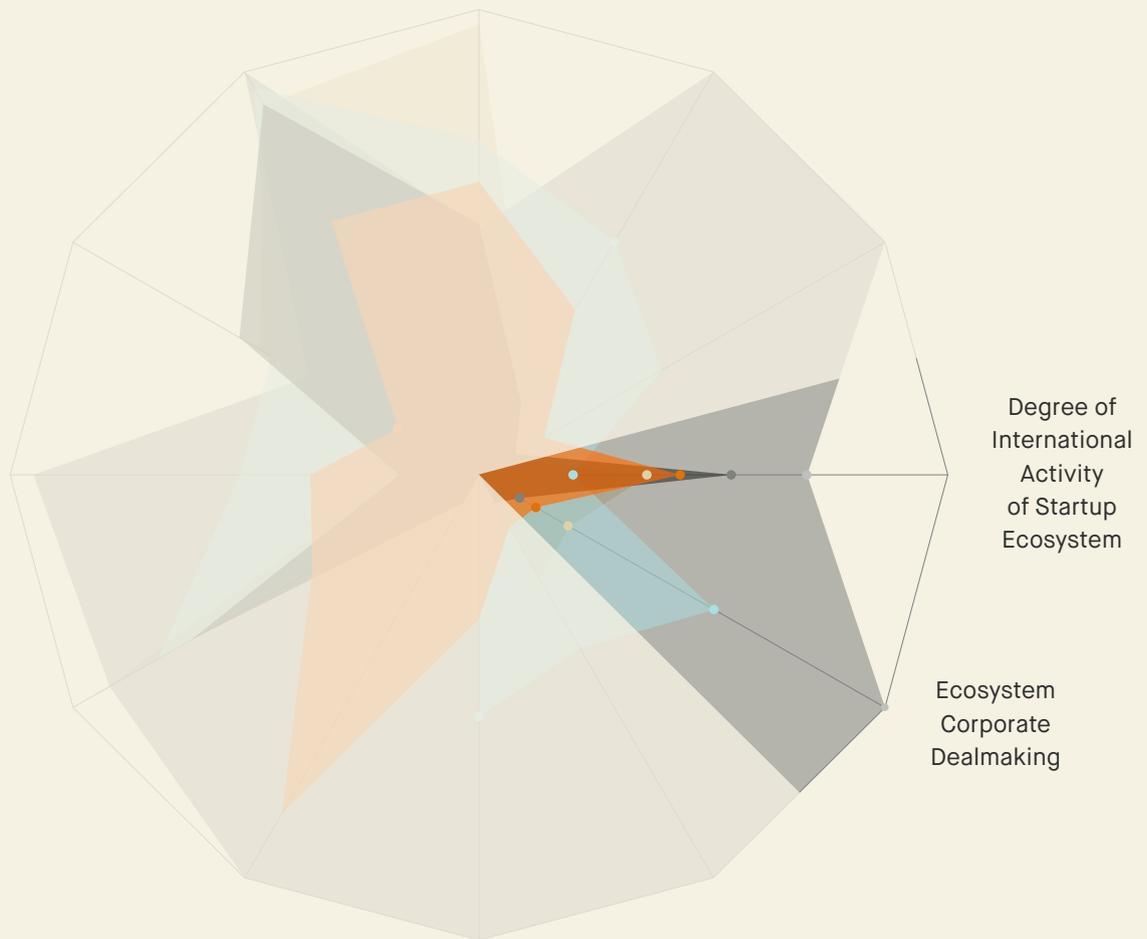
Working with the Ministries of Foreign Affairs and Economic Affairs, Climate, RVO and others, we will design and align international expansion instruments to optimally serve startup and scaleup entrepreneurs in their growth and access to markets strategy.

International expansion knowledge hub

Connecting Dutch enterprises to the power of startups and scaleups

Governmental affairs related to markets

Vision 2023



The 2023 vision for Access to Markets is to ensure scaleups can accelerate growth through easier access to buyers, partners and knowledge, nationally and internationally. International networks and high engagement from investors, corporates and government will be critical for success.

The key 2023 KPI's as represented in the spider diagram are:

- Increasing the ratio of scaleups with international success by 20% and to get to the top 3 EU-countries with scaleups with the highest degree of international activity.
- Techleap.nl is aiming at a 50% increase of corporate venture deals, growing from an average of 36 deals per year to an average of 54 deals per year.

During 2020 we will work on access to more indicative data to measure success of the engagement between corporates and scaleups.

Figure 5
**Access to Markets
KPIs 2023**

- Netherlands
- United Kingdom
- Sweden
- France
- EU Average

Actions 2020

Internationalisation

Increase the amount of scaleups with international success by 15% by end of 2023 and more than 5% by end of 2020 based on success criteria including measures like foreign revenues, offices, and international investors.

KPI 2020: 18,5% of Dutch scaleups have international success (up 5% from 17,6%)

Geo-specialist network

- Research Geo-specialist network models and develop a plan across the various international hubs based on the learnings from our research.
- Map and qualify existing networks in key hubs that support our mission.
- Support 5 experimentation cities with each of them hosting an event for the community.
- Measure and track effectiveness of network to gain new best practices.
- Sign up 150+ active geo-specialists across 5 cities.

International tech missions, conferences, and roadshows

- Develop and drive a strategic framework for international activities in collaboration with EZK, BZ, and The Netherlands Enterprise Agency (RVO).
- Coordinate a data-driven approach: alignment on success factors; launching one system of truth; consistent tracking and success measurements.
- Drive 200+ sales qualified leads (SQLs) through direct and indirect introductions as a result of various international activities where we play an active role (estimated pipeline value of €4M).

International acceleration programs

- 10 Y-Combinator applications leading to 1+ Dutch companies accepted for Y-Combinator 2020.
- Research highly networked, world class accelerators abroad and develop partnerships to accelerate the landing of selected Dutch scaleups.

International expansion knowledge hub

- Create a database with key expansion insights organized by location, sector, and growth phase.
- Create a database of case studies and connections organized by sectors and countries.
- Enable increased exposure to all public instruments as part of 'get ready for internationalization' treatment in collaboration with Fast Lane.

Quality of
local business
environment

improve impactful engagement between corporates and scaleups. As a leading indicator we are now aiming at a 50% increase of corporate venture deals, growing from an average of 36 deals per year to an average of 54 deals per year.

KPI 2020: increase of 12.5% (=40) corporate venturing deals as a leading indicator for the amount of deals between corporations and scaleups.

Bringing the
innovative power
of scaleups
to the heart
of corporations

- Develop a common understanding of the most common barriers and bottlenecks for collaboration between corporates and startups.
- Mobilize critical stakeholders to create a joint perspective on the opportunities for improved collaboration through lessons learned nationally and internationally.
- Experiment with 3+ initiatives to increase the opportunities for corporations and scaleups to collaborate. Gain insights on effectiveness.

Access to Capital



Access to Capital

Access to Capital will ensure that ventures based in the Netherlands get access to the best possible investors and funds to help them start, grow and scale internationally.

Key indicators Access to Capital

Share of
EU Annual
Investments

Share of
Increase
in EU VC
Fund Sizes

Increase
in Regional
LP Base

Notwithstanding a steady increase in deals, venture capital (VC) fund investment volume and a number of government support programs, The Netherlands is still a long way from realising this vision. There are a variety of issues signaled in the ecosystem and although qualitative data is not readily available, the challenges are apparent.

- There is a modest and fragmented supply of venture funding, spread over regions, sectors, funding stage and fund type (private/public).
- Overall deal sizes are small causing a relatively small overall impact, where only a few funds invest in multiple stages.
- There is a specific shortage of early and late stage funding and venture debt.
- Dutch VC find it hard to attract Dutch institutional investors in their funds and there is for now low presence of focused foreign VC that could provide material contribution in terms of capital and best practices.

Addressing barriers and bottlenecks

In recent years there have been several initiatives to address a range of investment issues in different sectors, regions and fundings stages.

Through StartupDelta initiatives we have gathered information and expertise that will help drive some action, yet several problems require a more in depth analysis before leaping into any implementation.

One barrier is that most family offices and institutional investors still hesitate to invest in VC funds or directly in ventures. This suggests that the biggest pools of available capital in the Netherlands are not convinced that scaleups and VCs have an adequate risk return ratio.

Actual numbers suggest that investment appetite for these ventures in some other European ecosystems, such as Sweden and recently France, is materially larger. This contradicts the Dutch view. Success stories are available in the Netherlands, but fund managers point to the following barriers:

- The small size of investments, and relatively high administrative costs.
- Mismatch of venture risk profiles with appetite for risk.
- The unpredictable and uncertain deal flow, referring to potential lack of available investment ventures, cultural and organisational mismatch and reputational risk caused by failures and high commissions.

If some of the local impediments are addressed these pools of capital can become available to VC investors.

Fragmentation of the funding supply is also a problem because entrepreneurs waste a lot of time and resources attracting investors. It also implies that several smaller funds and financing structures end up competing with each other for the most attractive ventures. Ideally, there would be larger funds that can support ventures as they grow.

Alternatively, existing funds could collaborate more effectively across successive funding phases. If each investor uses different (often restrictive) investment terms it is harder for them to co-invest and it can limit the startup's ability to raise funds in the future.

Limited availability of early and late stage funding

A healthy startup ecosystem has a large pool of early stage capital to get good ideas off the ground. This is generally provided by business angels and informals. This pool of private investors is relatively unorganised in the Netherlands, compared to the Nordics where there are single national business angel networks.

These are more professional, share risks, and are better integrated in the investment chain. In the Netherlands there is also no fiscal stimulation to invest in early stage high risk ventures like there is in other countries, such as the UK.



There is, however, substantial public money involved in early stage funding which is managed through universities and specific innovation instruments. These instruments often follow the logic of the institution that is administering them, instead of addressing the needs of entrepreneurs.

There are also too many small support instruments, all with their own specific conditions and requirements. The volume and the quality of early stage investment can be improved.

Few resident and active leading foreign VC funds

Startups are emerging all the time, all around the world. They are all aiming to scale internationally and attract the funds that can help them accomplish their dreams. Funds that have experience in bringing their companies to other markets and scaling them to IPO are therefore highly valued, both for funding and providing business expertise and opportunities.

Given the breadth of global activity it isn't obvious that Dutch based scaleups are in scope of these globally operating funds. For Dutch VC fund managers, it isn't obvious which of these foreign VC investors are the best fit for them.

Banks provide little debt or equity finance

Several banks have launched initiatives to get involved in the scale-up ecosystem by connecting with Fintechs or partnering in the setup of growth bootcamps. In addition, some banks have their own venture capital vehicles which invest in startups and scaleups and which are independent from the banks' core business.

Due to increasing regulation, the impact of equity stakes is increasing and banks are generally reluctant to expose a material part of their balance sheet to this activity. In addition, bank business models are under pressure from other regulation and frequently reassess which 'clients' bring sufficient revenues.

Startups and early scaleups with limited short term size are not top of their list. And if banks do support these ventures, it will be through debt, often covered by the assets of the founders. These constructs block entrepreneurs in later stages and don't support long term, ambitious growth.

Banks would probably be interested in facilitating institutional investors that want to invest in higher risk and return ventures, as these services would also bring them closer to attractive asset managers. This is especially relevant to Dutch banks which currently have a low success rate in serving those asset managers, compared to US and UK investment banks.

Road to Success

To ensure that scaleups based in the Netherlands get access to the best possible investors and funds to help them start, grow and scale internationally, Techleap.nl wants to create a higher volume of available investment and a better connected finance chain. To achieve this goal, we will explore the following eight points in 2020 to select the intervention with the most potential.

Institutional investors are mobilized

Techleap.nl wants Dutch institutional investors to invest in VC and increase the available capital ten times, making the Netherlands the home of Europe's leading VC funds. Growing Dutch VC funds enables investment in bigger deals, and de-risks the funding chain.

This will help Dutch institutional investors benefit from the high yields offered by top tier VCs investing in large technology driven transitions. Our main focus will be on creating a funding structure that allows efficient funding for ventures, yet addresses predictability of yield and value through, for example, a bond construction.

Our focus will be on finalising an innovative capital structure with key stakeholders followed by a quantitative assessment of its feasibility and impact. In addition, we will be looking at existing funding structures that work in other areas and assessing how to extend these structures to the venture industry in the Netherlands.

Public-private fund of funds structure to attract and boost VC funds that invest across funding stages

Based on international best practices, we'll drive a focused 10 billion public-private funding structure to make the Dutch VC sector the most vibrant VC sector in Europe. Attracting foreign venture capital to invest in the Netherlands by offering a VC lending or co-investment scheme similar to Singapore and Israel will help by increasing the size and scope of Dutch based VCs to write bigger deals and expand investments across all stages of funding.

In addition this should be used to build and consolidate best practices, attract talent and improve performance of existing asset managers and pension funds. In order to further mature such an initiative we will engage with the key public and private investors and other parties. Executing more detailed research to verify assumptions and impact, looking specifically at the effectiveness of similar efforts in other regions.

Road to Success

Institutional investors are mobilized

Public-private fund of funds structure to attract and boost VC funds that invest across funding stages

Marketplace for VC and venture, including events

Techleap.nl wants all relevant top tier VC funds investing in Dutch ventures, supported by a self-sustaining transparent online marketplace where ventures and investors can seamlessly connect and access support services.

Based on experience within StartupDelta and the Techleap.nl team, we will develop a first pilot with VC funds that are considered friendly and impactful to Dutch and EU tech ventures, after which the approach will be refined and amplified.

Explore functioning of early stage funding instruments from the Ministry of Economic Affairs and Climate Policy and the Ministry of Finance

Our goal is to enable each serious, early stage startup with potential to deliver large societal and climate impact in the Netherlands to access appropriate funding to develop the idea or technology into a commercially scalable venture.

This category of ventures specific market risks are lower and benefits are both financial and societal. This would justify a focused public and private funding vehicle with an efficient investment process. We will explore functioning of current early stage funding, where there might be shortcomings in supporting tech startups and then come with recommendations.

Standard term sheets leverage public funds

Ideally, all pre-series A investors in the Netherlands will apply the same basic terms. Early stage financing becomes transparent, simple, predictable, fair and frictionless, creating win-wins for investors and entrepreneurs.

The starting point will be to look at readily available standards and formats. After that, finalisation will involve many stakeholders to ensure these are adequate for investors and ventures. The resulting framework can then be endorsed by the financial sector, supported by the government and promoted to entrepreneurs with the simple guarantee that the terms are reasonable and can be trusted.

Optimize public financial support instruments

Ensuring that all public support instruments for financing innovative businesses are fully compatible with the needs and practices of early stage ventures and private investors will ensure optimal service, minimal bureaucracy and maximal impact.

Exploring ways to optimise the impact of existing funding based on international market practices and impact analysis, will help identify areas where efficiency and effectiveness can be enhanced in the ecosystem.

Marketplace for VC & Venture, including events

Explore functioning of early stage funding instruments from the Ministry of Economic Affairs and Climate Policy and the Ministry of Finance

Standard term sheets leverage public funds

Optimize public financial support instruments

Boost investor readiness and improve Business Angels

Friction caused by information asymmetry between founders and investors is avoidable when ventures find the most suitable investors to support their development and growth. Making investment strategy a part of all entrepreneur education, incubation and acceleration programs is key. Like other domains and projects, the need for better, investment related data is essential. For the top tech companies this would, for example, require reliable growth numbers like revenues and staffing. As this is a collective need for several public initiatives it makes sense that it is a coordinated effort.

Banks become part of the startup and scaleup ecosystem

Techleap.nl will work with banks to take a larger role in the startup and scaleup financing ecosystem, as direct and indirect providers of venture debt. Given the current bottlenecks, we will actively explore the extent to which some of the key Dutch banks are willing to play a role with institutional investors when it comes to investing in scale-ups and structuring finance innovations.

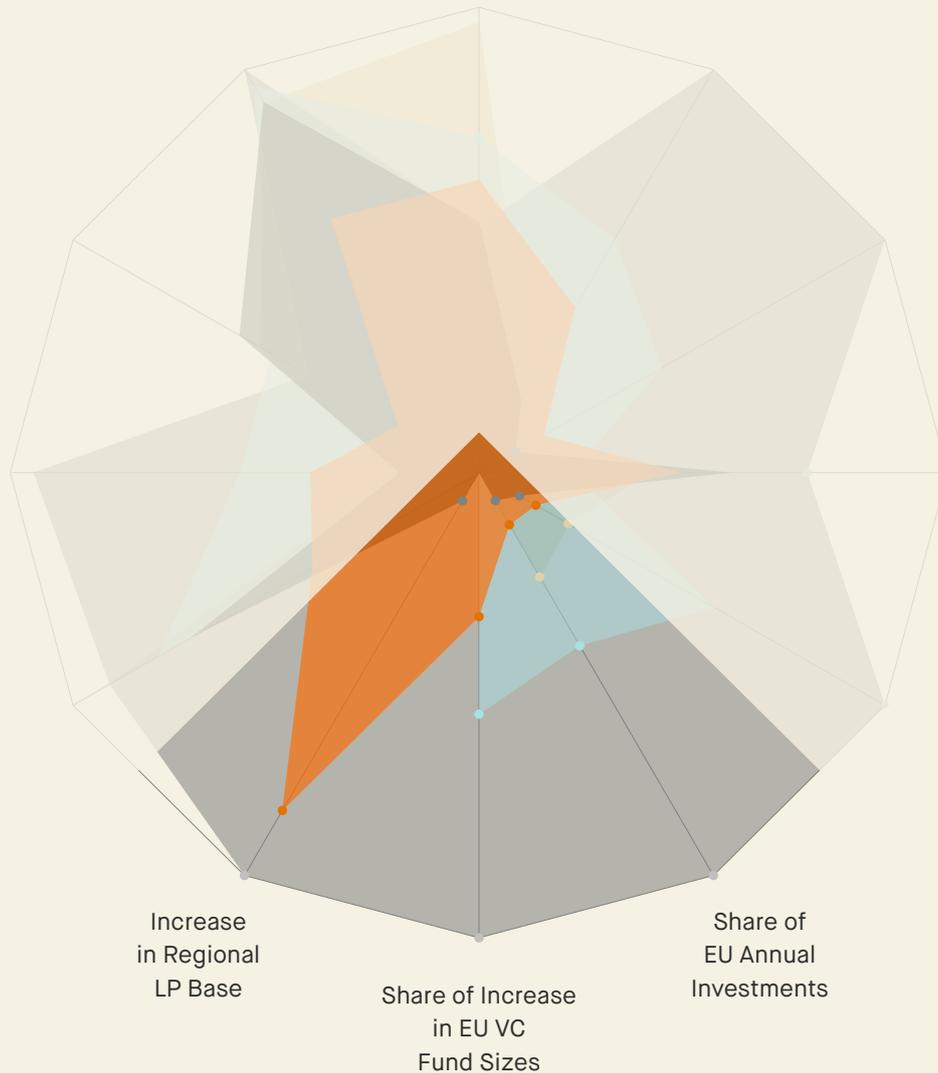
Banks can also help target the right foreign investors for whom a more detailed view of tech scaleups in the Netherlands could help make investing attractive, transparent and easier.

Part of the discussion will then be about how banks could be helped to make a larger part of their balance sheet available for targeted tech scaleups.

Boost investor
readiness
and improve
Business Angels

Banks become
part of the
startup & scaleup
ecosystem

Vision 2023



The vision for 2023 for Access to capital is to multiply currently available venture investment capital by 10. We aim to achieve annual funding of 10 billion for tech scaleups through public and private funding, while ensuring this funding is more effective for the startups in each development phase.

The 2023 KPI for the capital domain is a material increase in available capital to 10 billion for scaleup development and growth. This directly impacts the key KPIs as represented in the spider diagram (see Fig. 6 KPIs for Access to capital).

- 20% of all EU investments allocated to the Netherlands (now 4.5%).
- 38% of EU investment growth in the Netherlands (now 12.5%).
- Regional LP-investments growth to 20 billion by 2023 (current annual growth is 514 million).

Figure 6
Access to Capital KPIs 2023

- Netherlands
- United Kingdom
- Sweden
- France
- EU Average

These are ambitious KPIs and there is no single solution. We will work on several initiatives that have a broader impact. Those initiatives that prove successful after analysis and pilot phase will be amplified. Others may be discontinued.

The first action area where we will work on getting more Dutch institutional investments will primarily contribute to the increased % of regional LPs, and more indirectly to the other KPIs. The same applies for the second effort to get an overall public funding structure that can invest in each stage from startup to scaleup.

A key initiative to create a platform where investors and tech scale-ups can connect will work in parallel with the Access program and drive more local and foreign VC investments, impacting all metrics.

The initiatives including the creation of standard term sheets and aligning angel investors are more about fixing relatively simple shortcomings rather than directly boosting capital investments.

This translates into the following actions for 2020.

Actions 2020

Mobilize institutional investors

Double the 2019 volume of international investments; getting commitments from the four biggest pension funds and five other institutional investors (banks, insurance) to invest in VC and to collaborate in developing a sustainable solution (vehicle) to address the current barriers.

Public-private fund of funds structure to attract and boost VC funds that invest across funding stages

Letter of intent of the key public and private investors to drive a public fund of funds of 10 billion to make the Dutch VC sector the most vibrant VC sector in Europe.

Marketplace for VC & Venture, including events

250 most relevant VC approached and mapped, 100 ventures supported in connecting.

Explore functioning of early stage funding instruments from the Ministry of Economic Affairs and Climate Policy and the Ministry of Finance

Functioning of current early stage funding based on international market practices and impact analysis and then come with recommendations to the Ministry of Economic Affairs and Climate Policy and the Ministry of Finance.

Standard term sheets leverage public funds

Updated standard term sheets, commitment of 50% of ROMs and seed capital structure.

Optimize public financial support instruments

Study conducted on public financial support based on international market experiences and impact analysis, recommendations shared.

Boost investor
readiness
and improve
Business Angels

Startup Investment Canvas (SIC) available with 250 unique users.

Banks become
part of the
startup & scaleup
ecosystem

Pilot agreed and initiated. 1 letter of consent with committed
foreign provider.

Access to Talent



Access to Talent

When it comes to talent, Techleap.nl's 2023 objective is to ensure that scaleups based in the Netherlands have all the tools and knowledge to recruit, retain and develop the best talent to grow and scale internationally.

Key indicators Access to Talent

Ease of Filling
Software
Engineer
Job Openings

International
Tech Movers
Destination

Ecosystem
Funding
Gender
Balance

Recruiting and retaining the right international talent is one of the hottest issues for Dutch startups and scaleups today. There is fierce competition for professionals with a tech background and for experienced professionals that have scaled a business before. Data suggests that scaleups will need to hire 12,000 individuals every year for the foreseeable future.

In order to attract talent, Dutch mid-size scaleups must compete with much larger companies in the innovation sector. Competing for talent can feel like a David and Goliath battle as they lack the funds to pay the same as the “big players” or provide comparable secondary benefits. Startups and scaleups still have to realise their potential with most of the expected earnings in the future, but they require experienced team members to make that happen.

Added to this, the domestic pool of talent is not sufficient. The unemployment rate fell sharply from 4.9 per cent in 2017 to 3.9 per cent in 2018 and 3.5 per cent in 2019. The Netherlands Bureau for Economic Policy Analysis (CPB) expects unemployment to continue to fall. More than 2.1 million job openings (expansion demand and replacement demand) are expected over the next six years. Foreign talent will have to be attracted to keep the talent pool for scaleups as large and diverse as possible.

For today’s talent-driven organisation, diversity is more than an exercise in compliance or corporate social responsibility. It is a core driver of business success. However, the uncomfortable truth is that the technology industry in the Netherlands is not a place in which everyone, of any gender, race, disability, religion, sexuality and socio-economic background can thrive and succeed. In recent years only 0.8% of venture capital in the Netherlands was invested in female founders and only 5.7% in mixed teams. The damaging impact of excluding so much talent compounds with each year that passes. It is a significant challenge for startups and scaleups to face.

Road to Success

To ensure that ventures based in the Netherlands have all the tools and knowledge to recruit, retain and develop the best talent, Techleap.nl will start four programs within the talent domain: an international talent program, a national talent program and an internal recruitment program for scaleups. Part of the talent domain is also accelerating #FundRight.

International talent program

The aim of the international talent program is to attract international talent to scaleups in the Netherlands. Techleap.nl works on this program in close cooperation with a wide range of stakeholders from knowledge and educational institutions, governments and businesses in and outside the region.

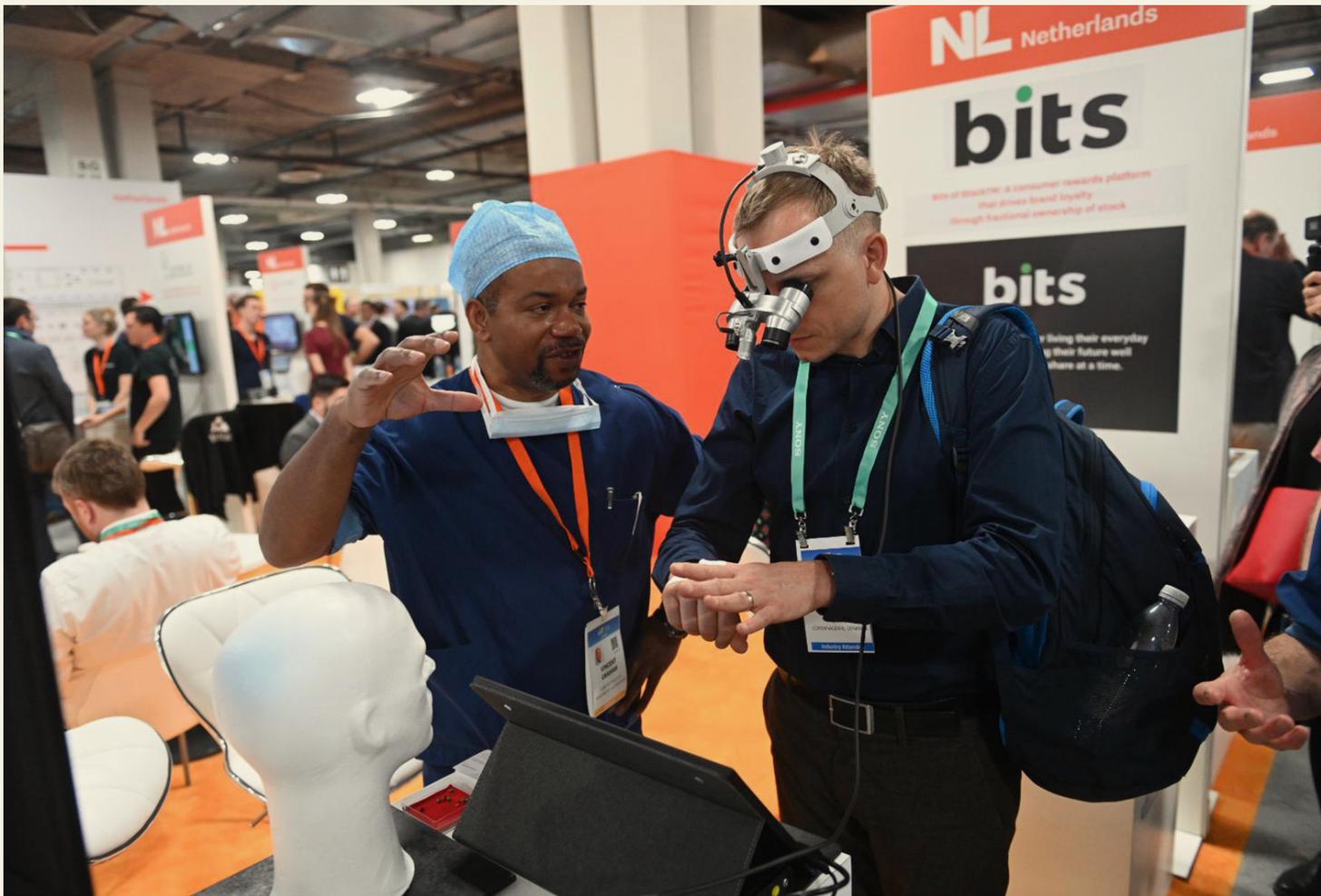
One of the activities of the international talent program will consist of quantifying and researching the 'talent' ecosystem in Europe. Where can we find top talent for Dutch scaleups? Mapping talent in Europe and a focus on the top tier regions in this area, will help sharpen the national, coordinated strategy for attracting international talent, together with our partners.

We need to bring the strength of the Dutch ecosystem to the attention of international talent. This action will be threefold:

- Quantifying why international tech movers currently don't favour the Netherlands as their destination. From a 2018 report by Atomico we see that from all international movers, 7.8% choose the Netherlands whereas the UK gets 20.9% of the pie and France 11.1%. Any roadblocks that prevent the Netherlands from being on the same level as France and maybe even the UK need to be addressed and possible interventions to be made.
- Techleap.nl will join the national branding campaign for the Talent Coalition, a recently formed coalition of 11 regional partners who believe that attracting and retaining international talent should have a prominent position in the national political agenda. A special focus on convincing international students to stay in the Netherlands is needed.
- Bringing scaleup vacancies to the attention of talent also needs focus. We will explore options to do this, following research. We will look at job platforms in the broadest sense. It could be achieved by increasing the impact of existing job platforms, interlinking job boards or by creating a new solution that appears while conducting research. Techleap.nl will also focus on approaching the target group of international talent with an online campaign. Whether this will go hand in hand with a platform, needs further research.

Road to Success

International talent program



National talent program

It is crucial to make optimum use of the talent that currently resides in the Netherlands.

With today's workforce challenges, the key to finding talent in the future may very well require competitors within the same industry to share talent pools. That's why Techleap.nl's aim is to quantify and research the options on talent sharing between tech companies.

Our aim is to build one of the most diverse scaleup talent pools in Europe. There are multiple initiatives in the Netherlands that help to bring underrepresented groups in tech together. We will accelerate research into all paths that make it easier for underrepresented groups to work at Dutch scaleups.

By mapping current initiatives in the Netherlands as well as successful ones from abroad, we will build a strategy to link the most effective programs to startups and scaleups. We'll also connect those initiatives with tech scaleups from Techleap.nl's network. This will help sharpen the national coordinated strategy.

National talent program

Internal recruitment program scaleups

In order for scaleups to be more successful in hiring international, diverse talent, Techleap.nl will focus on better access to tools and knowledge, or create tools and knowledge if needed to improve the internal recruitment infrastructure at scaleups.

Internal
recruitment
program
scaleups

Diversity and inclusion program

We want diversity in founding and management teams. Giving equal access to funding and opportunities is an important factor. #FundRight is an initiative focused on equal access to funding by working closely with VCs. We want to activate the most relevant VCs to lead the way and take a stand.

Diversity
and inclusion
program

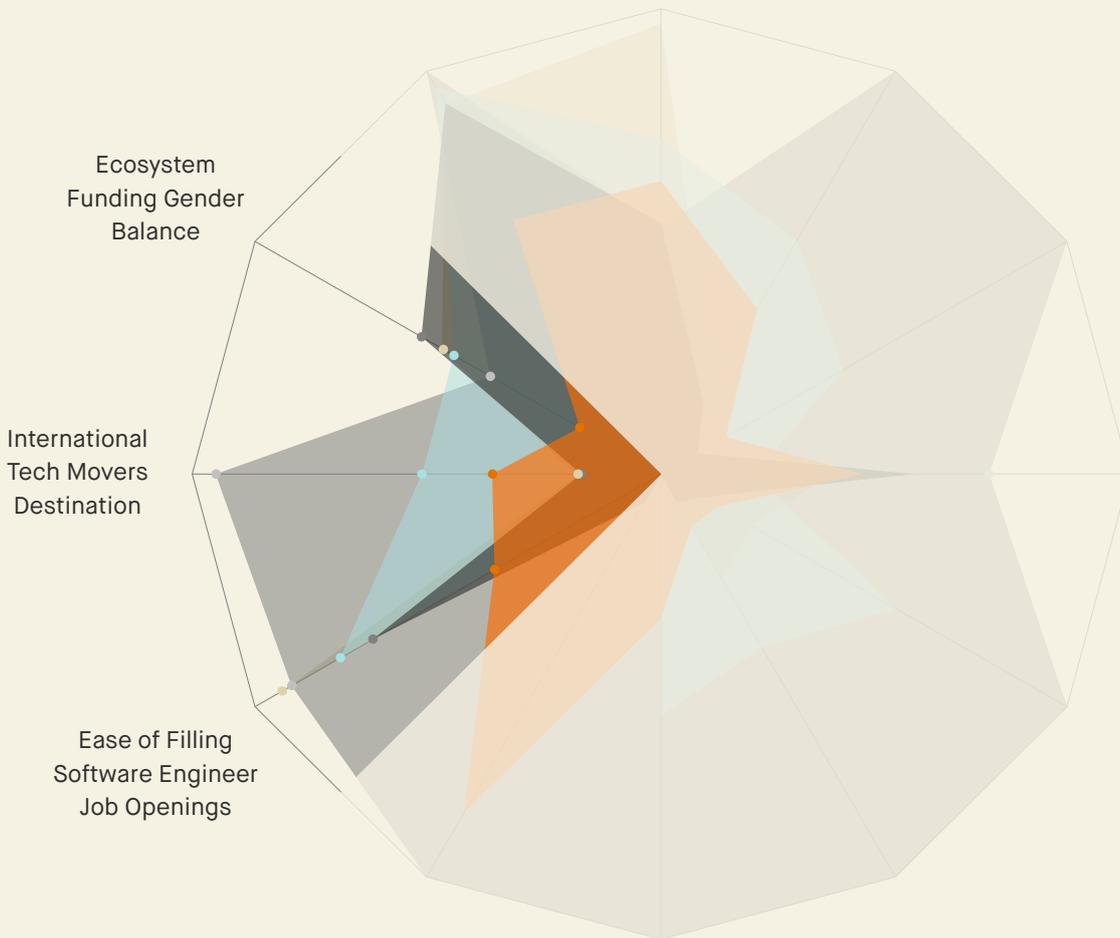
In 2020 the goal is to get commitment from the most relevant Dutch VCs and activate the #FundRight partners to share experiences, networks and best practices. Sharing how to tap into diverse talent pools and how to make the management teams of their portfolio companies and their own investment companies more diverse. More diverse management teams will lead to a more diverse workforce. At the same time we will be securing more data on diversity from our ecosystem to establish a baseline.

Governmental affairs

Techleap.nl, in partnership with government, wants to work positively on laws and regulations that encourage talent. This means that public support instruments for attracting, retaining and educating tech talent should be aligned to the needs of startups and scaleups. We will collaborate with the Ministry of Economic Affairs and Climate Policy, the Netherlands Talent Coalition and the Netherlands Point of Entry.

Governmental
affairs

Vision 2023



The overall goal of Access to Talent is to ensure scaleups get easy access to the best, diverse talent(pool) from the Netherlands or from abroad.

By 2023 Techleap.nl wants to accomplish the following:

- Lower the percentage of hard to fill software development vacancies in the Netherlands (open for > 60 days). Currently 48% of all software development roles in the Netherlands are hard to fill. The aim is that by 2023 this percentage is lowered to 23%.
- Make the Netherlands attractive for international tech talent. Currently 7.7% of tech talent in Europe and 7.8% of tech talent outside Europe is choosing the Netherlands as their destination. The aim is that by 2023 this percentage will be 15%.
- Give female founders and mixed founder teams equal access to funding.
- Celebrate diversity and inclusion in the Dutch tech ecosystem.

Figure 7
**Access to Talent
KPIs 2023**

- Netherlands
- United Kingdom
- Sweden
- France
- EU Average

We will work towards these goals in the coming years. 2020 will be a year in which Techleap.nl starts initiatives. These are expected to bring results in 2020 and the years to come. The current metrics to benchmark and assess success are not robust. In 2020 we will generate more, better quality data to give greater insights for future KPIs.

To fill software development vacancies, the goal for 2020 is to lower the hard to fill percentage to 44%. By 2021 this will be 39%, reducing to 33% in 2022, and to around 25% by 2023. 2020 actions that contribute towards this are the international talent program, the national talent program and the internal recruitment program for scaleups.

For international tech movers the aim for 2020 is to increase the percentage from 8% to 9%, in 2021 this will be 10%, in 2022 it will be 12% and in 2023, 15% of all European tech movers will choose the Netherlands as their destination. The international talent program and internal recruitment program for scaleups will contribute towards reaching these goals.

With #FundRight, Techleap.nl aims is to increase the percentage of Dutch capital that is used to fund female or female co-founded companies. Currently this is only 5,8%.

This translates into the following actions for 2020.



Actions 2020

International talent program

Sharpen the national coordinated strategy for attracting international talent for scaleups

- Quantify and research the EU talent ecosystem for scaleups. Where can we find the top talent?

Bring the strength of the Dutch ecosystem to the attention of international talent

- Research and quantify why the Netherlands is currently not the preferred destination of international tech movers.
- Join the national branding campaign of the NL Talent Coalition aimed at attracting international knowledge workers, with a special focus on convincing international students to stay in the Netherlands.

Bring vacancies of startups and scaleups to the attention of international talent

- Research initiatives with the aim to get (international) talent interested for Dutch startups and scaleups, including vacancies, career pages, references, best practice and success stories.
- Online campaigns in the chosen territories from the talent mapping exercise.
- Empower employers in their branding. Create an employer NL brand toolkit that scaleups can use in their communication with talent and provide knowledge on how to create a great internal recruitment infrastructure.

National talent program

Quantify and research the options on talent sharing between tech companies

- Collecting data for the following pillars: quantity and quality of talent sharing between tech companies; ecosystem collaborations.

Sharpen the national strategy for retraining and educating under-represented groups

- Quantify and research cooperation with government, scaleups and educational institutes.

Fund and endorse training courses

- Certify the best examples with an accreditation of excellence.
- Provide potential trainees with a catalogue of all training programs across the country.
- Endorse the 10 best courses from across the Netherlands or successful initiatives from abroad.
- Set up at least 20 collaborations between the courses and the scaleups in the Access scale program through traineeships and internships.

Internal Recruitment Program Scaleups

- Access to or create tools and knowledge to improve the internal recruitment infrastructure at scaleups.

Diversity and Inclusion Program #FundRight

- Create added value for committed #FundRight VCs
- Address and propagate diversity to create awareness and expanding the group VC.
- Research and monitor to understand the challenges in diversifying, within the #FundRight VC group.

Establish a baseline for diversity and inclusion

- Research and quantify the options related to diversity in the Dutch ecosystem.
- Take and create momentum for diversity dialogues in relation to the ecosystem.

Access

The Access program accelerates the growth of the 250 most promising scaleups internationally by providing them with access to new markets, significant funding opportunities and finding the best talent.

Key indicator Access

Scaleups
to Startups
ratio

The challenges that scaleups face are also covered within the other Techleap.nl domains and programs, but the effect of the required changes will probably take some time. We also want to see improvements for scaleups in the short term.

In the Netherlands a number of initiatives and organisations provide day-to-day support to scaleups through a combination of mentoring, access to networks for capital, talent and potential customers, with the goal of increasing their chances of success.

There is a working system that ensures startups get support, but this stops once the program finishes. Hands-on problem solving and network introductions are often limited to regional or sector specific connections.

The support landscape is also fragmented and supply driven, so evaluating and choosing a program, incubator or accelerator is difficult as the benefits are hard to quantify. This is frustrating for scaleup founders and the support organisations.

There is no database that covers all scaleups at different growth stages, with an up to date overview of their needs. Therefore, it is impossible to build personalised programs for sub cohorts of scaleups or match them with timely opportunities for growth, as happens in international accelerator programs or tech events.

So on the one hand, there is a working system for startups, but not for fast growing companies who particularly need access to markets, capital and talent. On the other hand, there is a lot going on worldwide. Dutch scaleups get invitations for events and missions worldwide and sourcing for this is always a challenge. The Access scale program responds on both the supply and demand side.

Access

Road to Success

Access will create the best access to markets, capital and talent for the top 250 scaleups. By 2023 we hope to have created the right environment to encourage at least two unicorns to rise. Access will offer evidence based knowledge about the growth potential of Dutch startups in different sectors and markets and how to build business models around different technologies.

To help achieve this goal, Techleap.nl will lay the foundations for Access in 2020 by:

Identifying the funnel and promoting the top 250

Over the next few years we will identify a funnel of around 1000 potential companies. Out of these we'll select 250 companies over 3.5 years who have the ambition to conquer the world. We will focus on mid stage scaleups looking for 10 million euro to grow their businesses. To do so we will use a clear definition, selection criteria and process, sourcing via the existing ecosystem of incubators, accelerators, VC and ROM's to get the relevant data. We want to get to know this group really well.

By being identified as part of the top 250, a company will be positioned as a successful, fast-growth Dutch tech company. Techleap.nl will promote this positioning and bring it to the attention of government, corporates, investors and the media.

Accelerating current potential scaleups

Techleap.nl and partners have a good understanding of the ecosystem from years of experience. We have proved that the contacts needed for scaling are there. Through Access we will take it one step further and develop a systematic peer-to-peer approach.

We will identify the most relevant stakeholders, so we get a clear picture about the additional programs we want to engage with. We will find a working program structure that enables us to help 10 to 15 scaleups for a period of 6 months, 4 times a year.

Peer learning is key: small groups of 10 to 15 companies will learn from each other, program peers and scale entrepreneurs on markets, capital and talent. We'll bring together the Netherlands most promising tech scaleups to build a powerful network and problem solving platform with peers. One on one connection with a top network worldwide will be part of the structure, as well as workshops delivered by leading scale coaches to tackle fundamental growth barriers across culture, talent, international expansion and financing.

Road to Success

Identifying the funnel and promoting the top 250

Accelerate current potential scaleups

Best in class

Out of the 250 we'll also identify a small group of best in class late scaleups. Their needs are less generic but by bringing these entrepreneurs together from time to time, we also serve the top companies with access to markets, capital and talent and peer-to-peer learning.

Diversity as an integral part of selection

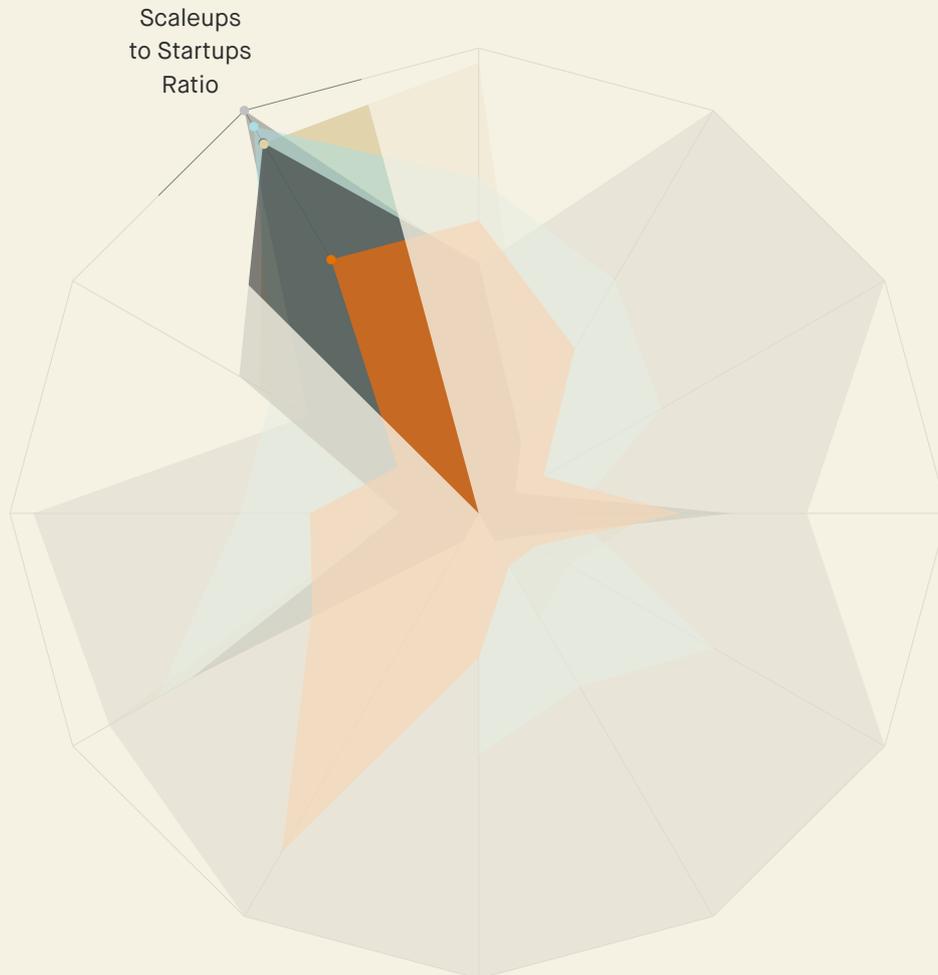
Diversity is important. We will follow the #FundRight guidelines (see chapter Access to talent) and aim for a minimum of 35% scaleups with a diverse founding or management team in the program.

Best in class

Diversity as an integral part of startup selection



Vision 2023



The aim of Access for 2023 is to accelerate the growth of 250 of the most promising scaleups by providing access to new markets, helping them to acquire significant funding and finding the best talent. The overall metric (see Fig 8. spider diagram below) is to increase the startup/scaleup ratio from 9 to 15% in 2023. We want to achieve the increase of 6% by our two fold mission:

- We will build 100% reliable database with accurate data on the 1000 startups and scaleups we have selected together with the ecosystem.
- Accelerate 250 scaleups by providing a batch of 15 scaleups four times a year to the Access scale program.

Figure 7
Access KPIs 2023

- Netherlands
- United Kingdom
- Sweden
- France
- EU Average

Actions 2020

Identifying and promoting the top 250

- Clear definition, selection criteria and selection process are identified.
- 1000 scaleups identified with complete data set.
- Onboard the first 100 scaleups.
- Create a 'badge of honour' for the selected companies.

Accelerate current potential scaleups

- Identify their biggest challenges by account managing the first onboarded companies.
- Identify most relevant stakeholders.
- Find a working program structure.
- Identify pilot needs out of the domains and ecosystem.

Best in class

- Identify and onboard 10 late scaleup companies.

Diversify the amount of startups

- A minimum of 35% startups with a divers founding or management team take part in the program.

Organization, Communication & Knowledge Management



Organization

Techleap.nl is organized around three domains (Access to Markets, Access to Capital, Access to Talent) and two programs (Access to Technology and Access).



The Domain directors and Program Leads connect national and international stakeholders and foster collaboration and the continuous improvement of the Dutch ecosystem. The Techleap.nl team has the task of supporting the domains in achieving their goals.

The Techleap.nl team will expand to 40 members in 2020 and will work on a temporary basis with freelance experts. We aim to build a diverse team. Techleap.nl is a 3.5 year program and will end mid 2023.

Special envoy, management team and organizational structure

The special envoy of Techleap.nl is Constantijn van Oranje. The management team consists of the CEO, the CFO/COO and the Director of Policy & Governmental Affairs. A strategic team, consisting of the special envoy, the management team, the domain directors and program leads will be set up for strategic decisions. The other departments such as project and event management, communications and data are at the service of executing the strategy.

Techleap.nl is a program from the foundation DutchStartHub and is funded by the Ministry of Economic Affairs and Climate Policy. The board of the foundation consists of the CEO of Techleap.nl, Nils Beers. The foundation's supervisory board oversees the way in which the board implements its long term strategy. The supervisory board regularly discusses the strategy, the implementation of the strategy and the associated main risks.

The Supervisory board consists of five members and is a representation of the startup ecosystem.

Mrs. Corinne Vigreux (chairman)

co-founder TomTom, Founder Codam Coding School (a.o.)

Mr. Steven Schuurman

founder and board member Elastic (a.o.)

Mrs. Gillian Tans

chairwoman Booking.com (a.o.)

Mr. Jaap Beernink

ceo Novel-T

Representative Ministry of Economic Affairs and Climate Policy

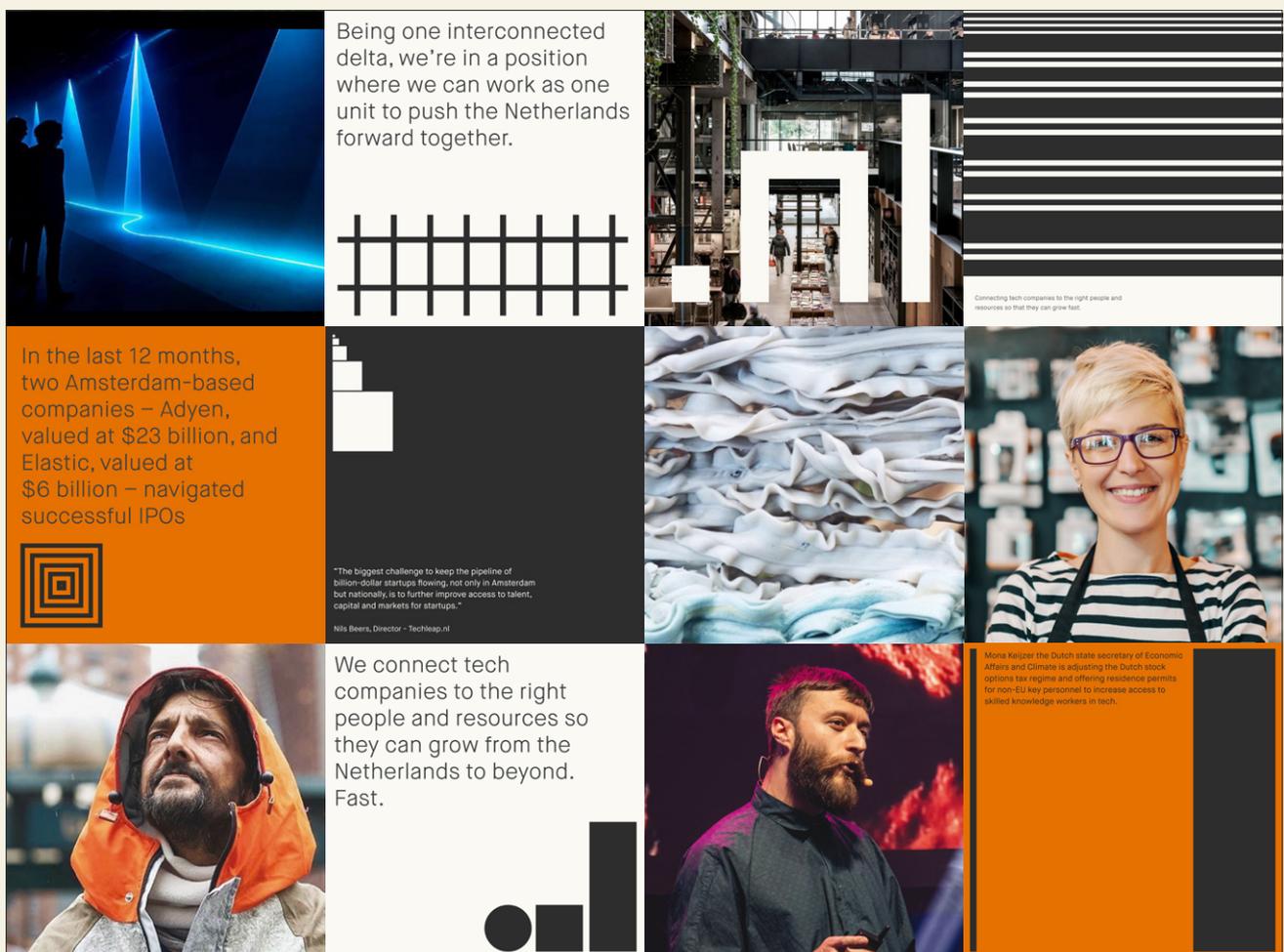
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Communication

It is important that Techleap.nl shows what it does and achieves. The communication department of Techleap.nl takes the lead in making the activities and results visible and activating the right target groups.

The communication department of Techleap.nl supports the domains and programs in achieving their objectives, tells the Techleap.nl story, the story of the Netherlands as an innovative country, as well as the story of our leaders in technology.

The communications team helps quantify the Dutch ecosystem, bringing facts to life with storytelling.





Supporting domains and programs

In 2020, a tailor-made communication strategy will be developed and executed for each domain and program, including the further segmentation of target groups and communication objectives.

This will include a look at each stage of program development, initial promotion, communication of its purpose and the results. A trial templated approach for promoting the programs will be reviewed as part of the initial strategy development.

Building and promoting the Techleap.nl brand

We'll create and build the Techleap.nl brand within the international tech ecosystem through its content and online presence:

In early January, 2020 the new Techleap.nl website will be launched, as well as the new online and social strategy. Part of this strategy is to do more storytelling in external communication in addition to the usual communication about the results.

Content will centre around showing Techleap.nl's impact through:

- Testimonials
- Editorials
- Columns and blogs about programs, companies, collaborations and investments

A new PR strategy will come into play in 2020, with an extra focus on generating international media attention in addition to attracting national media.

Quantifying the Dutch ecosystem with storytelling

An important function of Techleap.nl is to quantify and inform about the Dutch ecosystem using data. The communication and marketing department of Techleap.nl will:

Position Techleap.nl as a distinctive brand with a powerful reputation in the field of data on the Dutch and European tech ecosystem.

Present and disseminate knowledge in such a way that it encourages the target group to take action at various strategic and relevant moments.

Promote knowledge from the Finder and other data sources in an accessible manner to the media, the general public, relevant stakeholders and partners from the ecosystem through the use of relevant communication and marketing techniques.

In order to effectively achieve the goals listed above, the marketing and communications team will be expanded in 2020.



Knowledge Management

Techleap.nl is a data driven organisation, making evidence based interventions.

We will analyse data, procure, conduct and collaborate in research and provide gained knowledge to partners, stakeholders, decision makers and founders. We will do so by publishing and sharing reports, case studies, business model insights and ecosystem developments.

We will explore the options to facilitate knowledge sharing between founders in the Access program.

Finder and ScienceFinder

The aim of the Finder is to have the most robust and comprehensive dataset on the Dutch startup ecosystem in order to quickly identify barriers, bottlenecks and challenges in order to take action.

The Finder consists of data about all startups in the Netherlands, investors and acceleration programs. The TechleapFinder will be enriched in collaboration with national and international startup data platforms. Account managers of Techleap.nl will proactively and continuously reach out to stakeholders with relevant data and have a contact moment with every startup and scaleup at least three times a year.

The data and knowledge will be added to the Finder. We will promote the use of the Finder to enable better access for all parties in the ecosystem (see also Communication).

The ScienceFinder is 'the' tool to find technology and accelerate partnerships (see chapter Access to Technology program). We map out academic knowledge to the business community via the ScienceFinder.



10. Techleap.nl

Governmental Affairs & One Single Hub Fund



Governmental Affairs

Techleap.nl's 2023 objective for governmental affairs is to ensure that the conditions in the Dutch business climate are superior to other successful and upcoming international ecosystems.

Ambitious and up-to-date startup policy agenda

We are up for the challenge of keeping the government's startup policy agenda, which was launched simultaneously with the announcement of Techleap.nl, up to date and will monitor progress in collaboration with the different ministers. Special focus will be on regulations supportive to embedding technologies, talent attraction, stimulation of investments and access to markets, in line with the focus areas of the Techleap.nl domains and programs.

To build the startup agenda, up to date and in depth knowledge of the latest developments in tech and impact of new regulations for scaling should be available for civil servants and politicians. Too often policy making and the development of new business models and scaling take place in different universes. Policy making is locked in a structure of consultation with known organisations. Tech experts and startups are not part of that structure.

Policies are made without sufficient insights into the latest technologies, solutions and business models, possibly leading to unforeseen restrictions on their development. And existing policies and regulations may not fit new business models and technologies.

To overcome this mismatch, our effort will be to connect the right person in government and parliament with the right information and expertise about tech developments, at the right time. We will take the initiative in tabling issues to help increase insights and understanding about improving the tech ecosystem. We will also offer masterclasses to civil servants and politicians and organise working visits to extend their knowledge about the latest developments in tech and new business models.

Government as a Service

Collaborating with the Ministries and agencies is critical to remove the barriers experienced by founders. We will do so in two ways.

Remove regulatory barriers

Frontrunners in tech often encounter unintended restrictions that hinder innovation. Sometimes it is only a matter of interpretation, requiring a more open, innovation friendly mindset. But the consequences for young companies can be big in terms of fines, slow down and risks to business continuity.

Although the government wants to be open for entrepreneurs, it can be hard to find out who is the competent person to speak to. Therefore, we will function as a liaison between entrepreneurs that encounter issues and the government. And we'll work on a more structural approach with the Ministry of Economic Affairs and Climate Policy and Fast Lane from RVO that results in a dedicated contact point for founders that experience unintended hindrance due to regulation.

Align government support with current startup needs.

There is a diverse supply of subsidies, loans and business support instruments. The challenge for entrepreneurs is to find an instrument that fits its needs and is open for applications. Often the criteria, timing and planning – as with trade missions and conferences – are determined by the logic of RVO or government departments. This makes it difficult to anticipate the actual needs of businesses. The effectiveness of government support instruments depends to a large degree on the ability to change these from a push to a founder pull approach, as well as better access.

International collaboration on startup policy

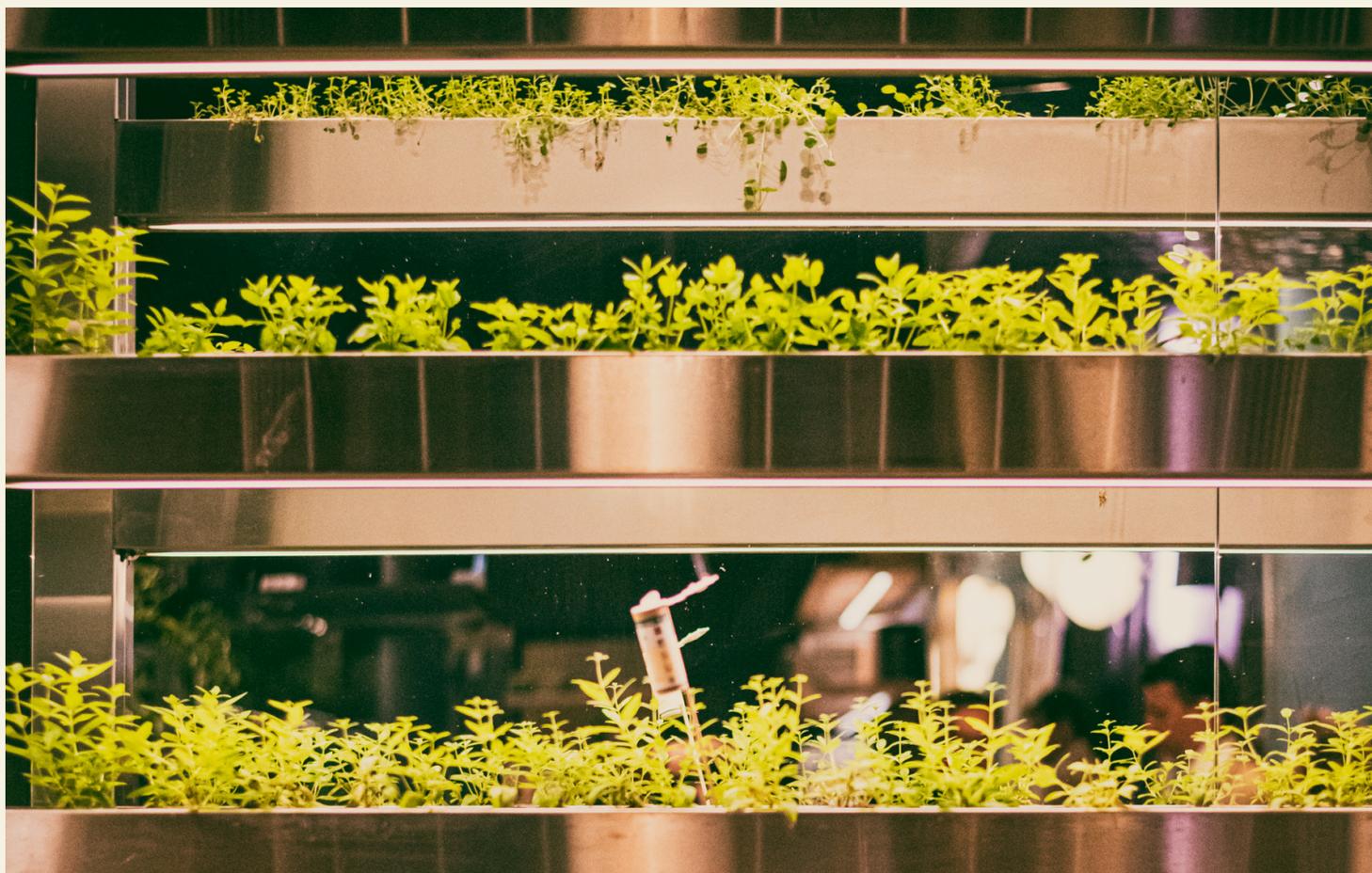
To prevent Europe, and the Netherlands, from digital colonisation, laws and regulations are implemented with the aim of protecting the internal market and European values. But protection against unwanted dominance of non-EU tech companies can also have negative side effects for highly innovative and fast growing companies within the EU. Our effort will be to influence EU policy by collaboration with Allied for Startups and the Startup Europe Network to give input at EU policy level. We will also explore the added value of an 'S5 Group' of five leading EU tech countries to collaborate in paving the way for startups that want to scale in Europe.

One Single Hub Fund

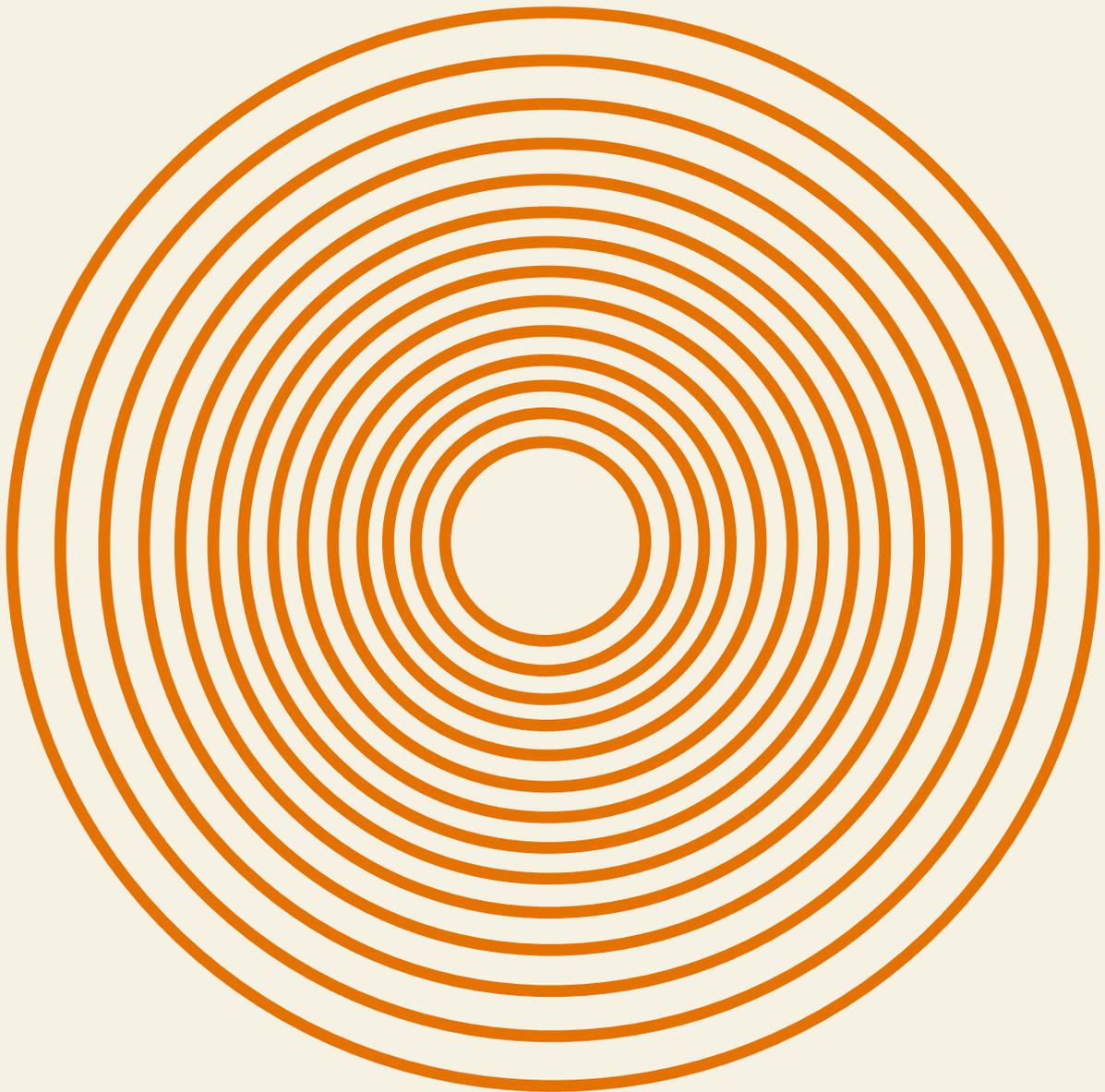
In 2020, the One single hub fund will be launched. The fund will support initiatives that strengthen the ecosystem in line with Techleap.nl's ambition.

In 2020, the One single hub fund will be launched. The fund will support initiatives that strengthen the ecosystem in line with Techleap.nl's ambition. This fund will be set up to give financial strength and support to good ecosystem initiatives in the Netherlands. Through the One single hub fund, ecosystem pilots and initiatives can be accelerated by providing a one-time financial impulse. The fund will not invest in individual startups and scaleups.

The One single hub fund is a part of the startup policy of the Ministry of Economic Affairs and Climate Policy and has a link with the Techleap.nl program.



Let's empower Dutch
leaders in tech to build
great companies for
a better world.



techleap.nl