



Accelerating your Startup Ecosystem Into an Economic Growth Engine

Startup Genome
San Francisco - London - Berlin - New Delhi
Jun 2021

Agenda

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Introductions - Startup Genome Global Footprint

2

Ecosystem Assessment and Prioritization of Gaps

3

Ecosystem Strategy

4

Action Planning and Project Implementation

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GSER 2020 has been our most popular edition to date

Commonly referred to by Heads of State, Mayors as well as private sector leaders



500,000+ unique views by global investors, entrepreneurs, talent, and other global stakeholders



700+ media citations in leading local, national and international media - 2.5X growth year over year

“Required reading for any entrepreneur” - Kate Mitchell, Wall Street Journal

Startup Genome online

> 600,000 unique readers p.a.

Top Countries:



- | | | | |
|--|---|--|---|
|  United States |  Canada |  United Kingdom |  Netherlands |
|  India |  Germany |  Brazil |  Australia |
|  Japan |  Singapore | | |

Monthly Newsletter

130,000 Subscribers including:

Data-driven insights for public and private agencies committed to accelerating the success of their startup ecosystem.



Startup Genome Partners With The World Bank And Georgia's Innovation and Technology Agency

Two world leaders in economic transformation assist Georgia's Innovation and Technology Agency (GITA) to create a data-driven analysis of Georgian startups and the tech sector.

NEWS HERE



Candid Conversations With World-Leading Startup Ecosystem Leaders - Featuring Deepak Bagla



Government / Policy Makers



IGO / Foundations



Public / Private Innovation Agencies



Ecosystem Builder / Startup Support Organizations



Investors



Startup Founder & Leaders



Academic / Other Researchers



Journalists

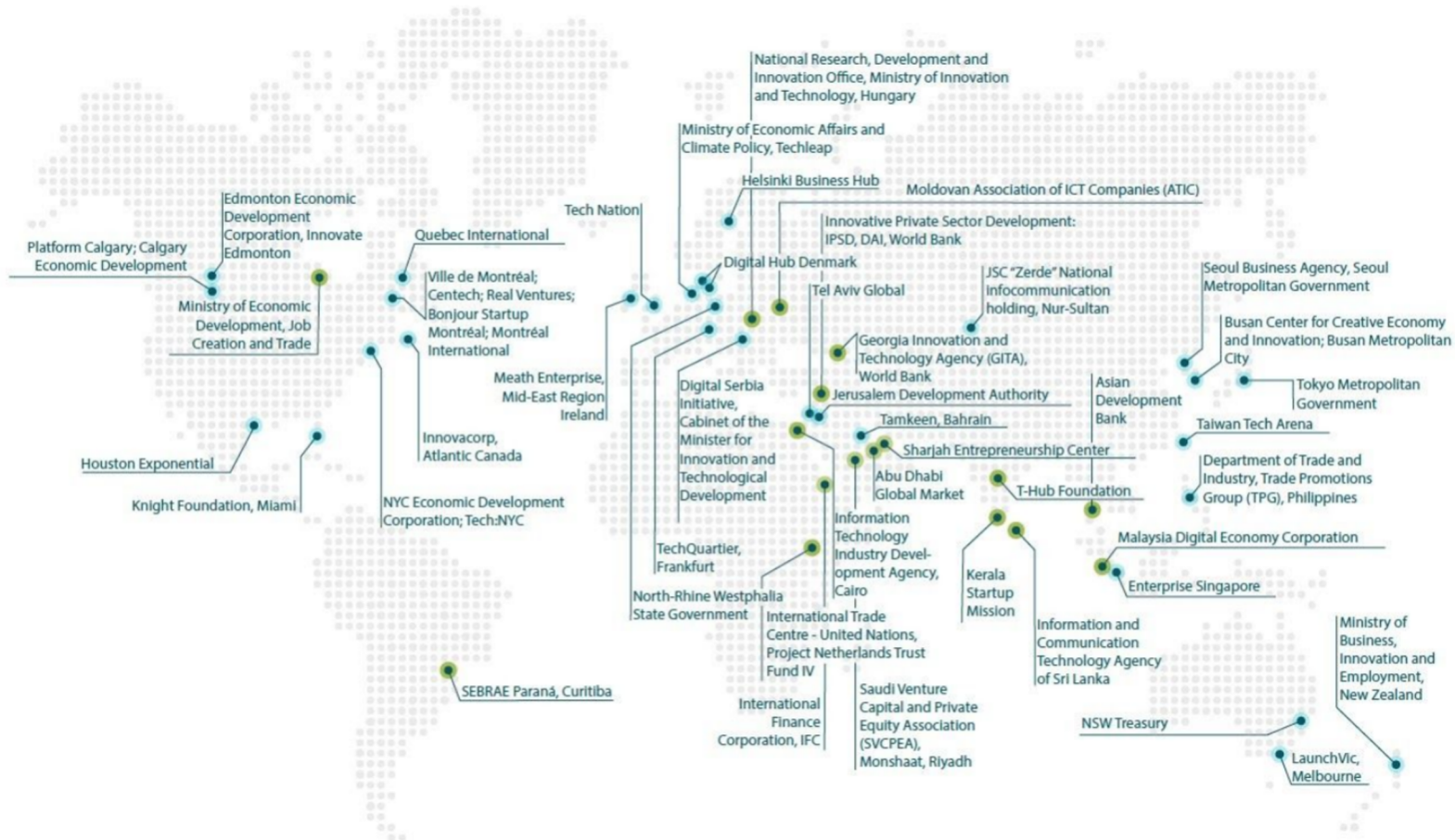
Who We Are

Startup Genome is the world's leading innovation policy advisory and research firm, having advised more than 100 governments and public/private partnerships in the last 3 years.



Selected Members of our Global Client Network

Fast Growing and adding new ecosystem leaders on a monthly basis



Startup Genome Leadership Team



JF Gauthier
Co-Founder & CEO
San Francisco

5x Serial Entrepreneur

Advised 100+ Governments

Harvard
Business School



Stephan Kuester
Head Ecosystem Strategy
London

Tech Nation (UK) - Global Lead

1st MD, Digital Switzerland

Former Top Manager,
EY & Arthur Andersen



Tricia Whitlock
Chief Operations Officer
Atlanta

Corporate Innovation

Minority-focused VC Investments -
TechSquare Labs

Editor-In-Chief - Hypepotamus



Marc Penzel
President & Co-Founder
Berlin

World Economic Forum
Expert of Entrepreneurship

Helmholtz Innovation Labs

Member of CII Startup Council

Selected Global Innovation Policy Forum Participants

Senior Ecosystem Leaders coming together to share valuable knowledge and experience



Gerard Grech
CEO, Tech Nation, UK

World's most renowned
Innovation Agency



Edwin Chow
Asst. CEO, Enterprise
Singapore

Singapore's Innovation Agency



Sagi Dagan
VP Growth, Israel
Innovation Authority

Israel's Innovation Authority



Justin Kreamer
SVP, New York City EDC

New York's Innovation
Agency



Surina Shukri
CEO, MDEC

Malaysia's Innovation Agency



**Constantijn Van
Oranje-Nassau**
Envoy, Techleap

Agency of The Netherlands



**Sharon Landes-
Fischer**
CEO, Tel Aviv Global

Tel Aviv's Innovation Agency



Francis Bilodeau
Senior Asst. Deputy
Minister

Innovation SEC, Canada Gov.



Rocio Fonseca
CIO, CORFO

Chile's Economic Dev. Agency



Jang Young Seung
CEO, Seoul Business
Agency

Innovation Agency of Seoul



Kate Cornick
CEO, LaunchVic, Aus

Victoria Innovation Agency
(Melbourne, Australia)

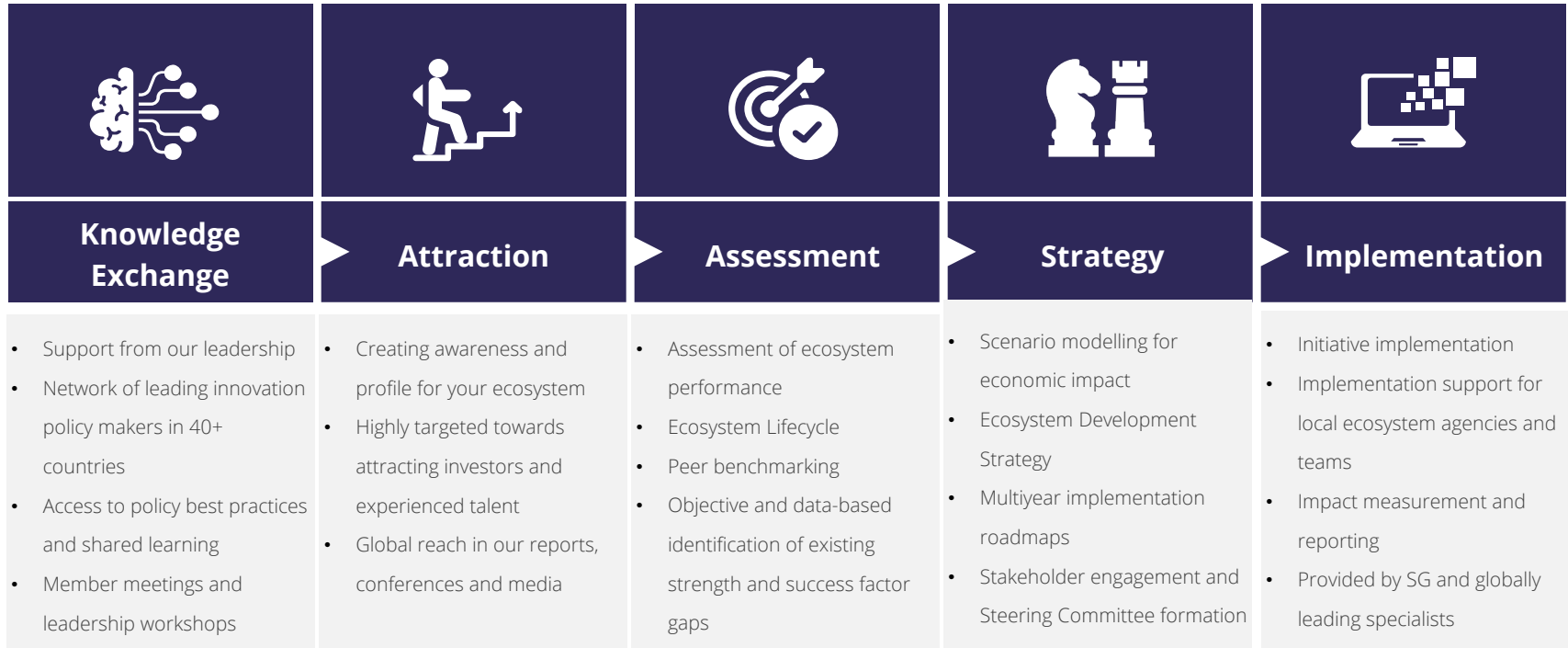


Wensheng Wu
General Manager, GEI

Leading Advisory Institute to
the Government of China

How we support ecosystems – Startup Genome Services

Economic and Public Value/ Legislation & Regulation / Talent / Investment / Startup Support Programs / Scaling and International Expansion



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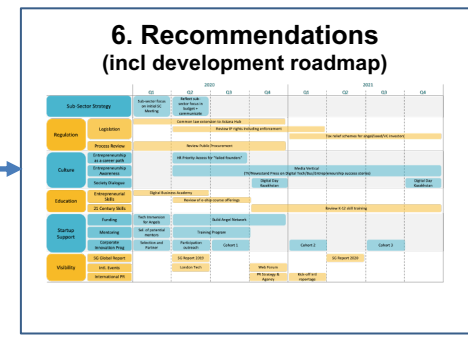
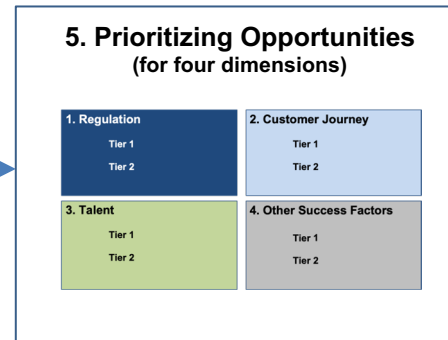
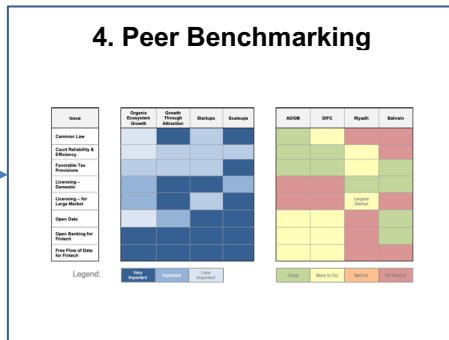
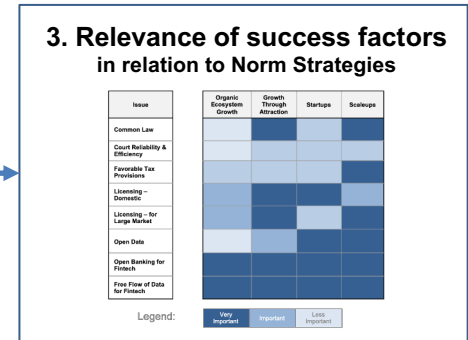
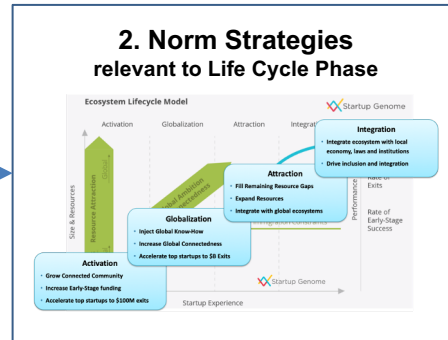
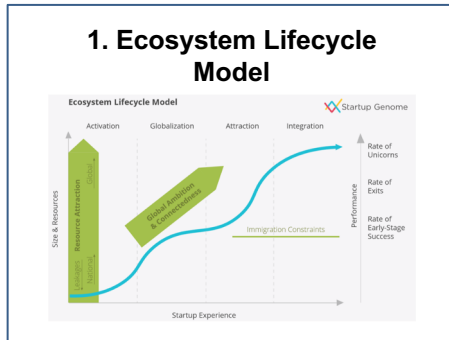
Ecosystem Strategy

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Action Planning and Project Implementation



Our Ecosystem Assessment and Development Approach



What would you like to see in a startup ecosystem assessment?



We support ecosystem leaders across the entire value chain of startup ecosystem development



Phase I:
Assess & Align

Phase II:
Strategize

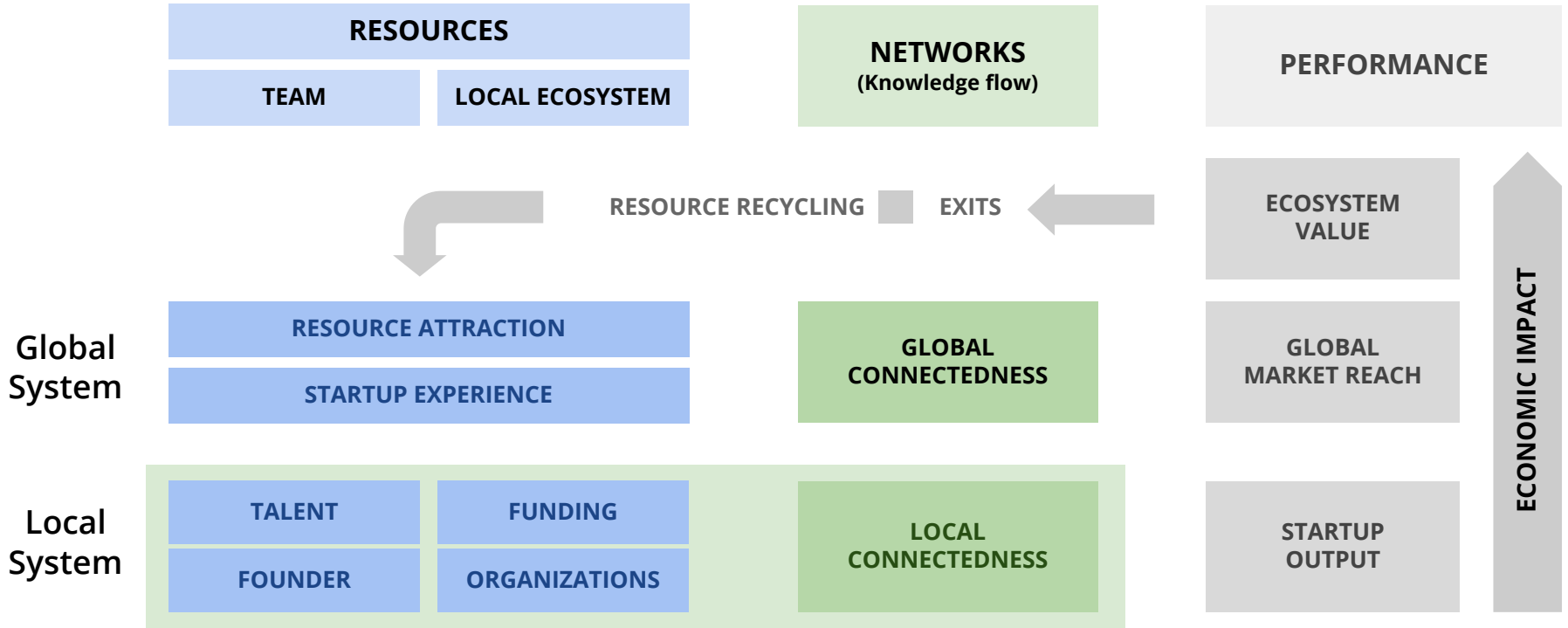
Phase III:
Plan

Phase IV:
Execute

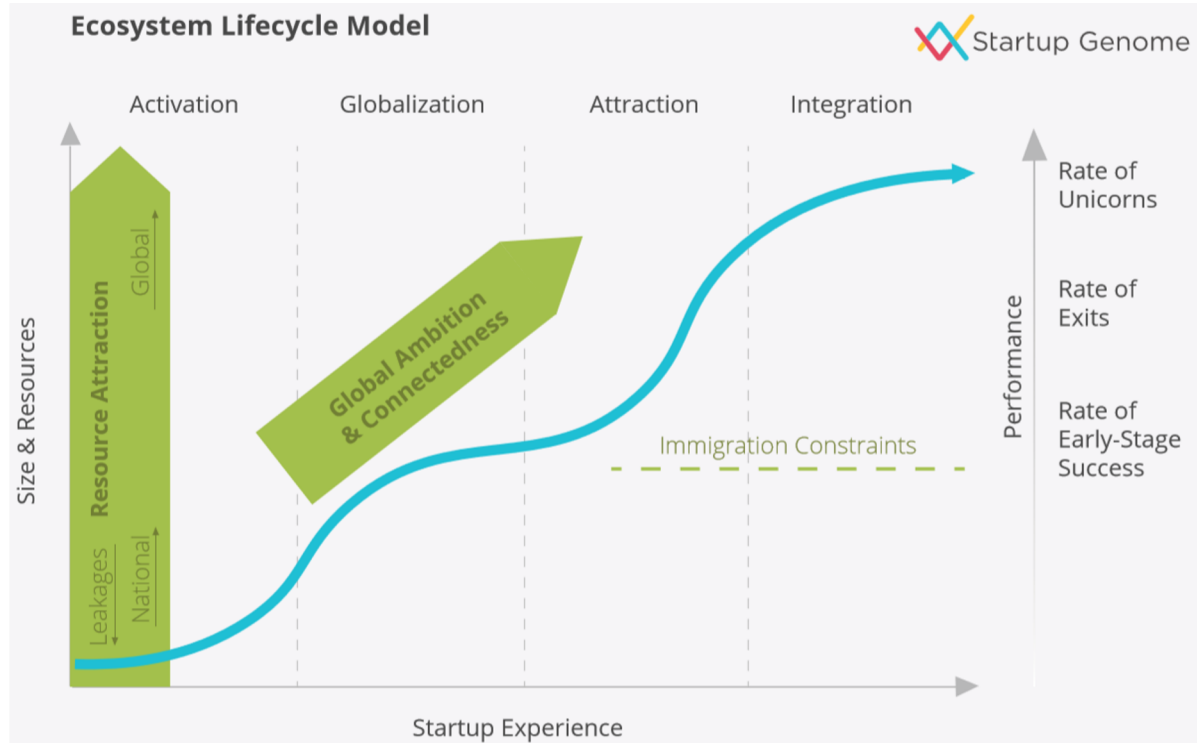
1. Assessment of Best Acceleration Opportunities

- Quantify key strengths to strengthen global positioning
- Identify key gaps that are holding back ecosystem growth
- Objective assessment of local sub-sector strengths (e.g. Advanced Manufacturing & Robotics) relative to 135 major cities

1) Success Factors are assessed from the Voice of the Entrepreneurs: Creating Data on their *experience* of the ecosystem

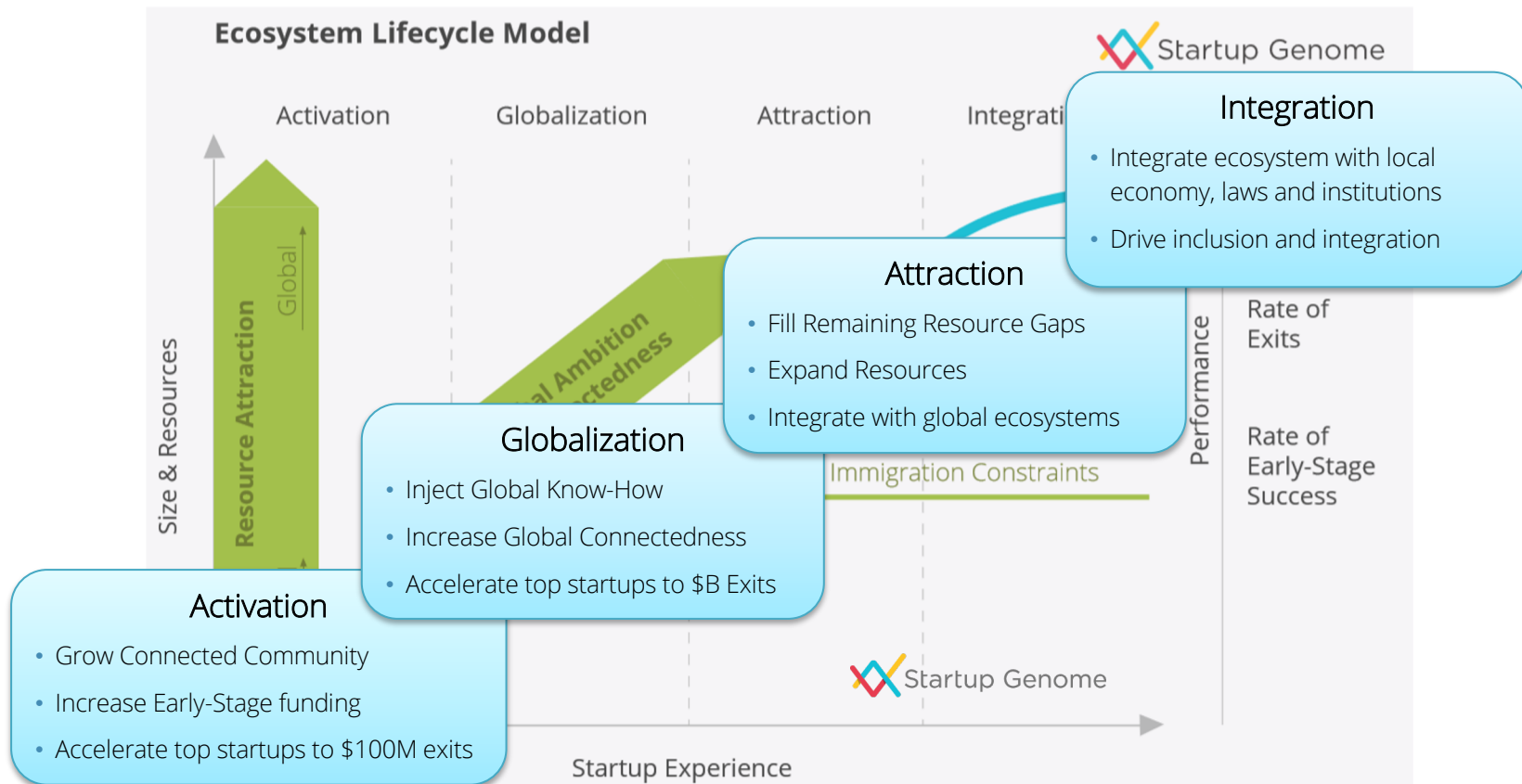


2) Ecosystem Lifecycle Phase Identification: Where is the ecosystem versus the normal evolution?

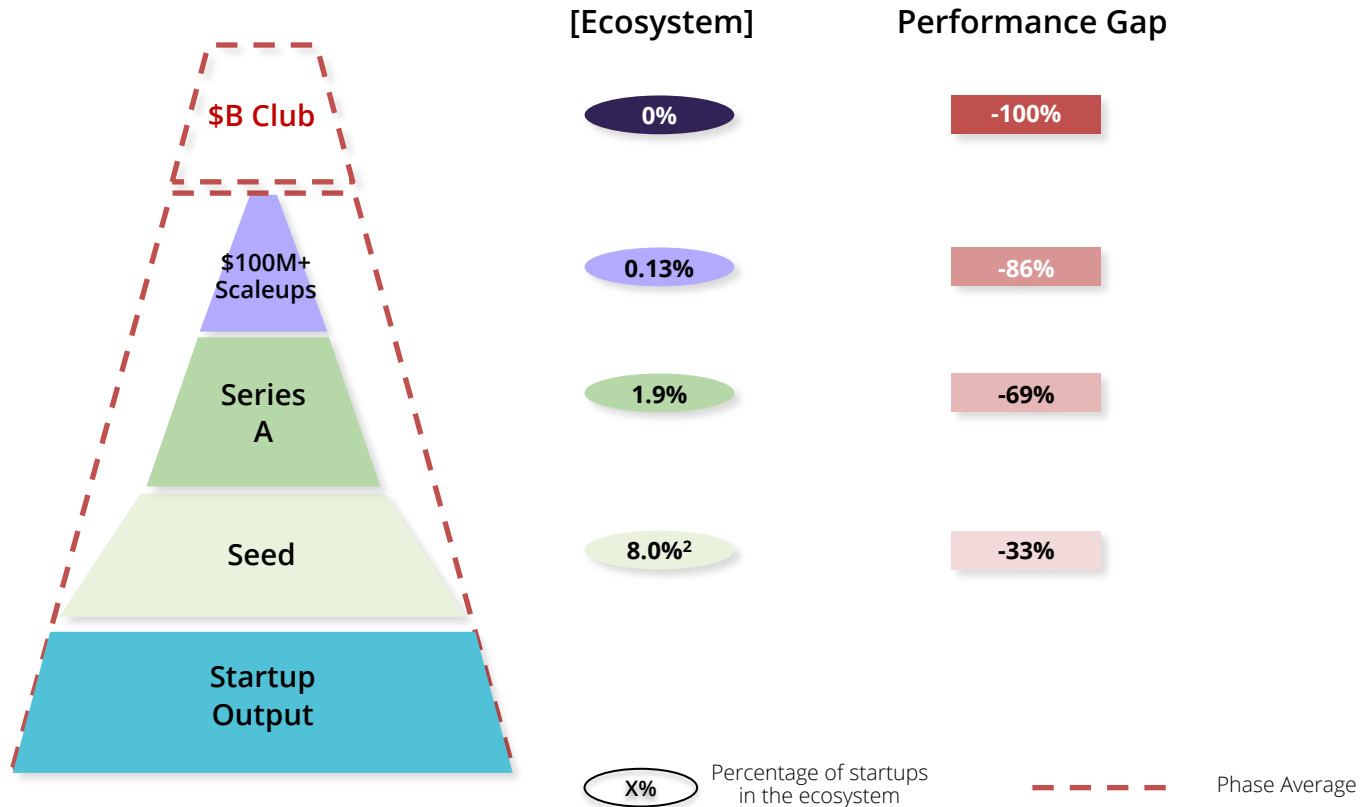


1. Global Competition for Resources and Markets
2. Economic Impact = Production of scaleups
3. Grows with ecosystem size and experience

The Lifecycle provides core Phase Objectives

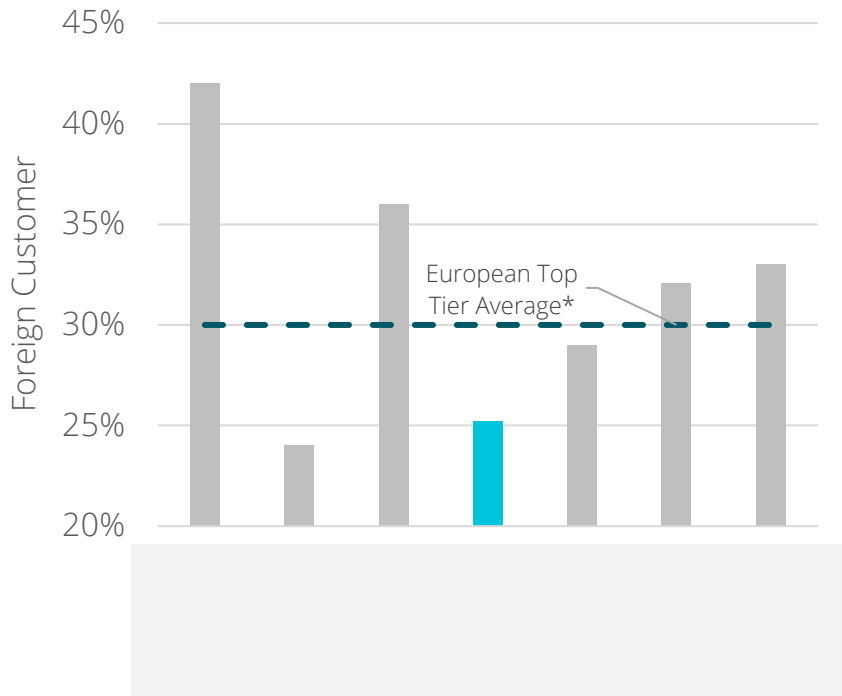


3) The Ecosystem's overall scaleup performance is measured

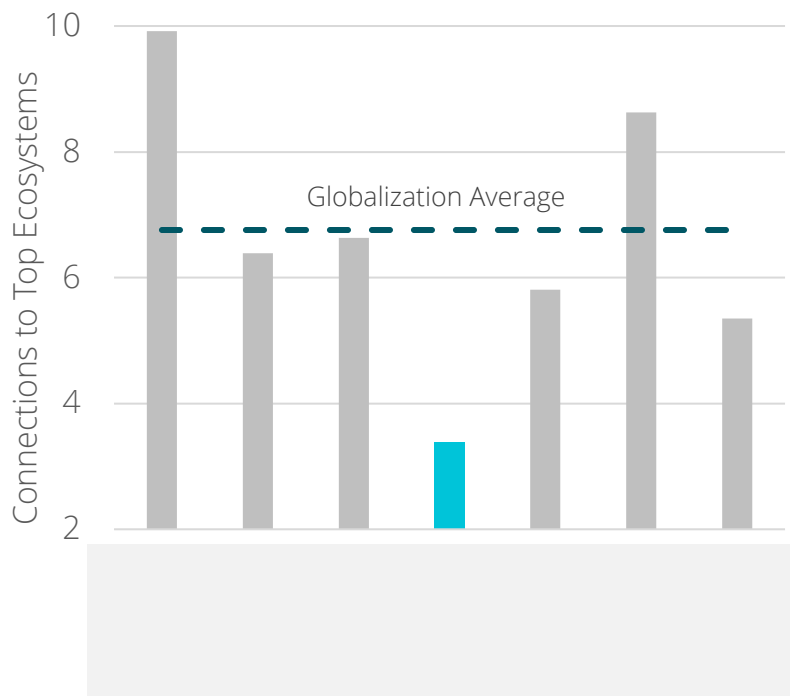


4) And explained by Success Factors, Subfactors and Metrics scores versus the most relevant Regional and Global benchmarks

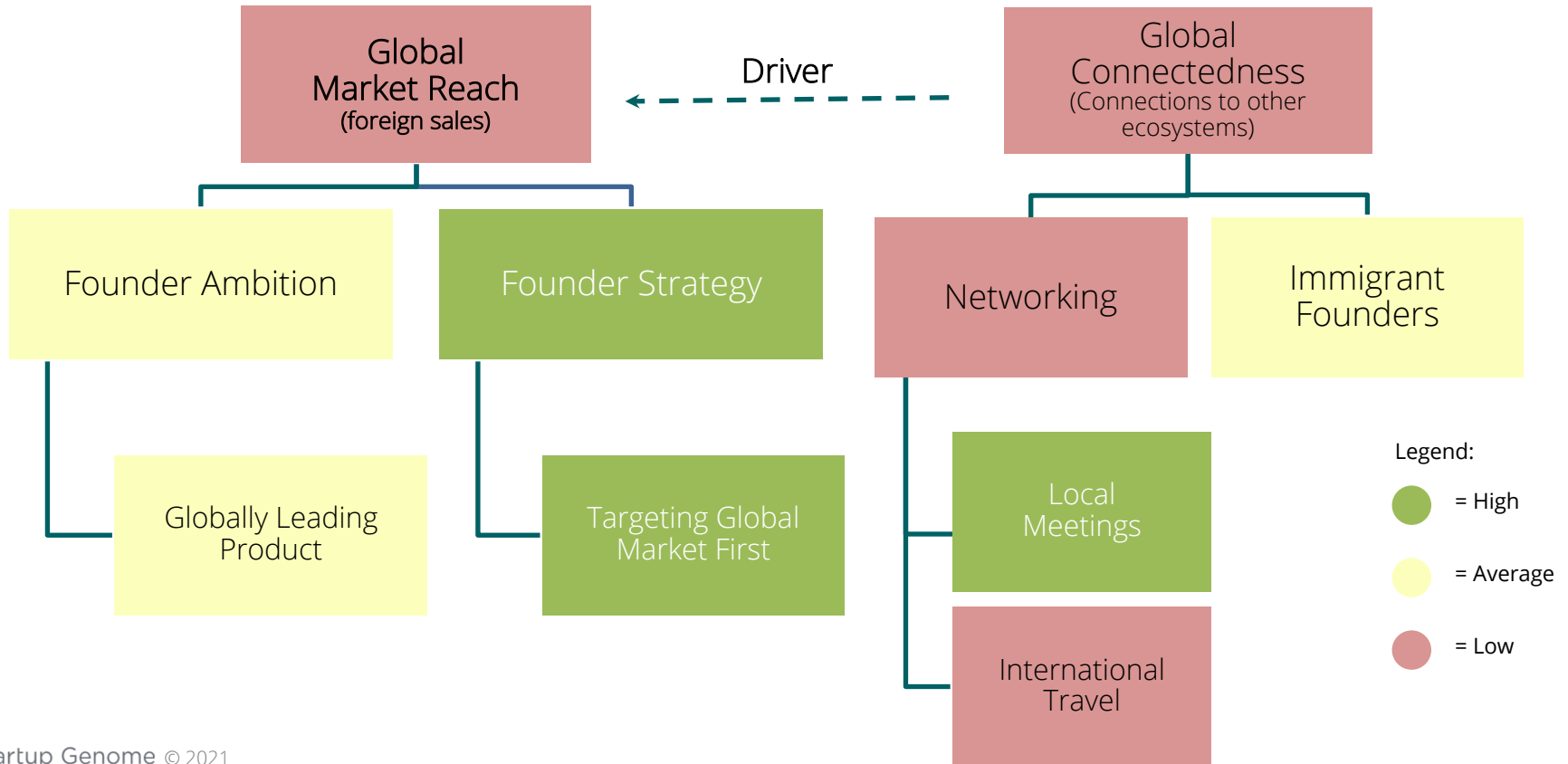
Global Market Reach



Global Connectedness



5) To clarifying the significant gaps: What Success Factors are abnormally low? What are globally high?



6) Local Sub-Sector Strengths: Ranking your Sub-Sector Performance Globally



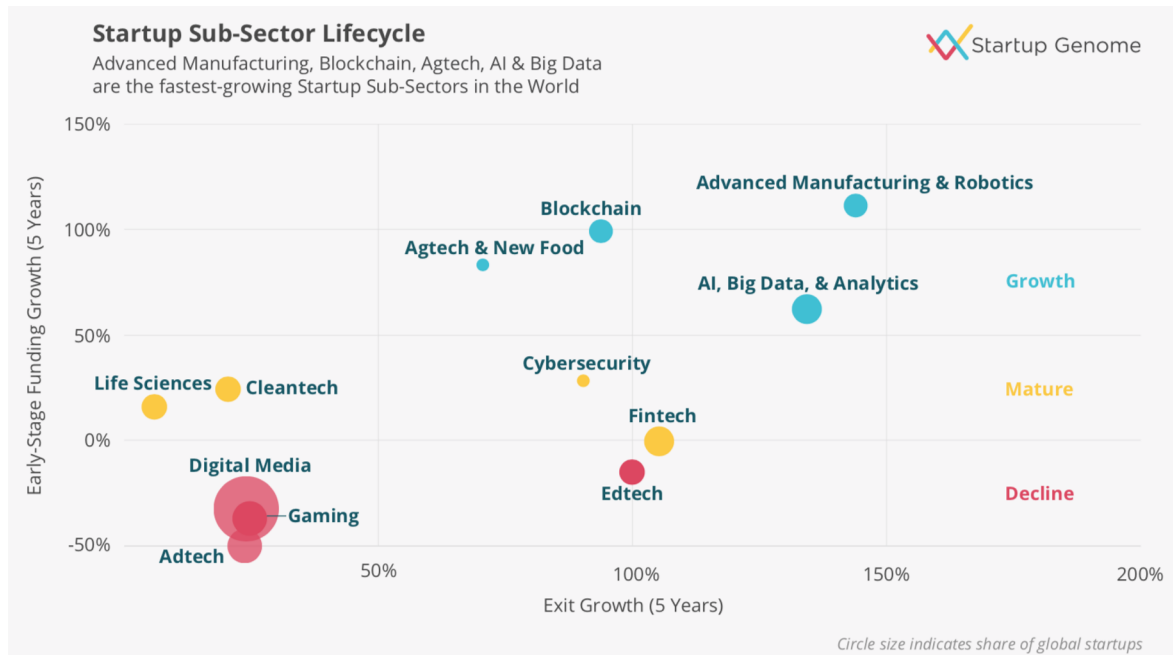
	Adtech	AMR	Agtech & New Food	AI & BD	Blockchain	Cleantech	Cybersecurity	Edtech	Fintech	Gaming
Global Rank	37	34	18	45	48	16	32	81	66	31

Performance	41	53	21	47	82	30	31	90	61	30
Funding	65	30	42	63	38	44	57	73	45	70
Startup Experience	24	46	9	47	38	33	35	74	72	18
Focus	62	61	-	-	80	-	-	-	61	44

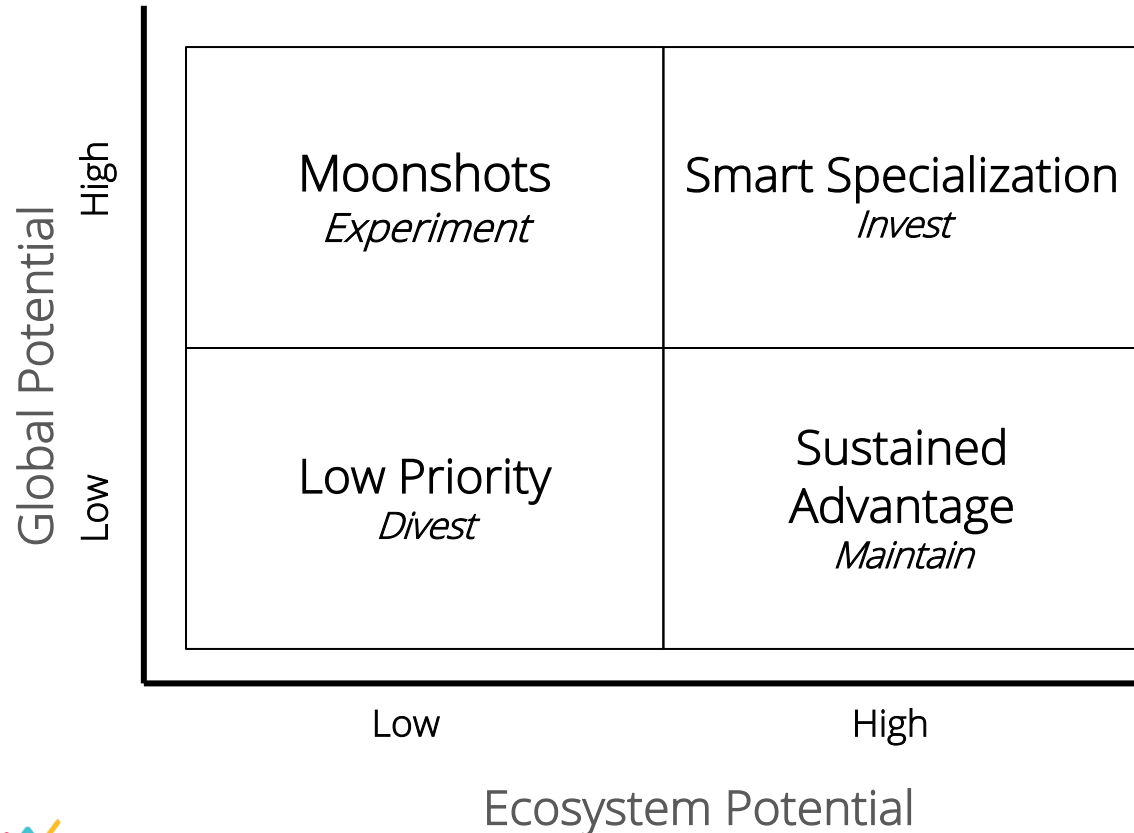
6) Global Potential for Sub-Sectors: Quantifying a New Era of Disruptive Innovation Globally



- Global Share of Deep Tech Startups:
2010-2011: 22.8%
2017-2018: 45%
- Adv. Manufacturing, Blockchain, Agtech and AI & Big Data fastest growing
- Other Sub-Sectors are maturing or declining

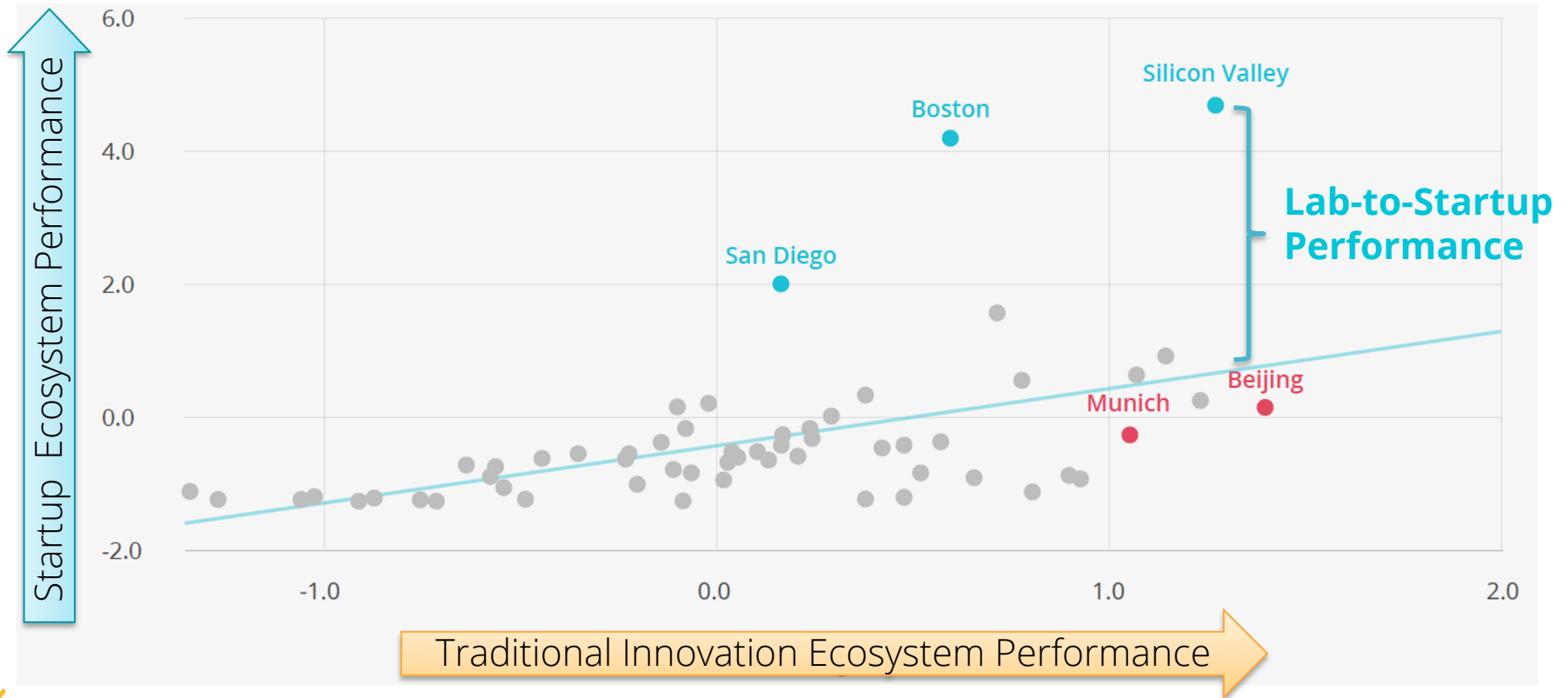


6) Innovation Edge: Identifying Sub-Sector Strengths and Opportunities



Data-driven measurement of sub-sector strengths relative to 135 cities, rooted in universities, corporate fabric and startup ecosystem

6) Innovation Edge: Lab-to-Startup Efficiency



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Phase III:
Plan

Phase IV:
Execute

2. Alignment across stakeholders

- Consensus among the Local Community
 - Convening of ecosystem leaders and broader community to present and debate results
- Creation or Adjustment of Ecosystem Leadership Group
 - Development of group representing the different types of ecosystem stakeholder groups, with credibility, influence and network

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- Define acceleration strategy and medium-term roadmap
 - With scenarios and range of budgets and economic impact
 - Based on proven strategies used by successful ecosystems
- What you get
 - Practical ways to solve the gaps, bet on local strengths, and reinforce the ecosystem structure
 - Medium and long-term roadmaps
 - Quantification of economic Impact
 - Budget scenarios
 - Buy-in from Ecosystem Leadership Group and key influencers

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Phase I:
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Phase II:
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Phase III:
Plan

Phase IV:
Execute

- Produce detailed short-term action plan with recommended partners / vendors
 - Developed in collaboration with Ecosystem Leadership Group and potential partners and vendors
- What you get
 - Detailed plan of action with global best-practices
 - Budget with detailed breakdown
 - Partner/vendor proposals to approve and execute

We deliver project implementation with a broad network of global specialist partners

Innovation and Startup Ecosystem Policy		GEN	<ul style="list-style-type: none"> • Connecting connecting leaders and policy makers from 190+ countries • GEC Ministerial – Internat. Knowledge exchange at Minister level
		Bella Private Markets	<ul style="list-style-type: none"> • Innovation Funding Policy and Capital Structuring Advisory • Harvard Professor Josh Lerner's firm renowned for innovation policy
		Technation	<ul style="list-style-type: none"> • The UK's agency for the start- and scaleup segment • Policy for Fintech, AI and Cyber. World leading scaleup programs
Digital Transformation		Cambridge Management Consulting	<ul style="list-style-type: none"> • Digital Transformation advisor for corporations and the public sector
Seed Stage Finance		ARI (Angel Resource Institute)	<ul style="list-style-type: none"> • Angel Investor Activation and Training • Angel Group Formation, Governance and Mentorship
Incubation and Acceleration		GEN Accelerates	<ul style="list-style-type: none"> • GEN Accelerates is the overarching program that creates, curates and houses entrepreneurship training, mentorship and acceleration programs
		Frontier Networks	<ul style="list-style-type: none"> • Specialist for FinTech, Blockchain, Tokenization, IIoT as well as ecosystem related Real Estate Development • Frontier is run by the Founder of Level39, Eric van der Kleij
Education and Training		Flitepath	<ul style="list-style-type: none"> • Entrepreneurship Education, Corporate Innovation and Venture Management
		GrowthX	<ul style="list-style-type: none"> • Silicon Valley based specialists assisting founders in developing key managerial and growth capabilities in a virtual and hybrid coaching model
		Techleap	<ul style="list-style-type: none"> • Amsterdam based training providers for Digital Skills development • Includes retraining for unemployed or at risk workforce, inclusion of underprivileged groups of society through digital skills training offerings.
Attraction		The Next Web & The Financial Times	<ul style="list-style-type: none"> • Media partner for large scale positioning and attraction programs • Large scale ecosystem events and conferences

Phase I:
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Phase II:
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Phase III:
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Phase IV:
Execute

- **Implementation support**
 - Ongoing project management, implementation supervision and quality assurance
 - Ongoing facilitation of an ecosystem steering group / stakeholder group
- **Ongoing Monitoring**
 - KPIs, measurement and reporting mechanism to ensure transparency in regards to implementation, budget efficacy and to ensure consensus within the community is sustained over time.

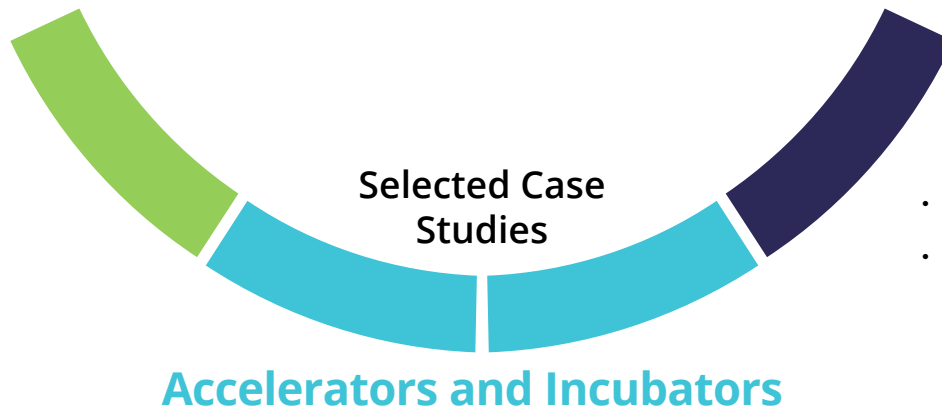
Selected Cases with key stakeholders



With the support of findings from broader startup ecosystem assessments, we have helped our members with more focused cases

Regulatory Bodies

- **REGION:** Middle East
- **Context:** The startup ecosystem of this developed Middle Eastern city saw limited uptake of entrepreneurship due to bottlenecks in the legal framework
- **Our role:** Startup Genome uncovered issues and designed a recommendations roadmap on key regulatory bottlenecks based on inputs from ecosystem stakeholders



- **REGION:** Middle East
- **Context:** To support the success rate of startups in the ecosystem, the World Bank wanted to finance leading accelerators and incubators in a Middle Eastern state
- **Our role:** Focused assessment of all curriculum-based programs in the ecosystem to measure investment readiness and select the right candidates for financing based on organizational strengths and ecosystem priorities

Venture Capital

- **REGION:** APAC
- **Context:** Although one of the world's best performing startup ecosystems, gaps in the private venture capital ecosystem persist in this East Asian city. There are few foreign VCs leading to a domestic funding environment
- **Focus:** An outside-in and inside-out perspective of the VC environment, designing strategies to help internationalize the venture capital ecosystem through best practices followed in leading ecosystems

- **REGION:** Western Europe
- **Context:** The government of a large Western European province wished to buy or build an accelerator program for its local startups
- **Our role:** Startup Genome designed the RFP requirements to define eligibility based on the landscape of the startup ecosystem and provided evaluation support for submitted applications

MOVING FORWARD

Questions & Answers





Thank you

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