



Stats and Data

Richard Stevens IDC / FI-IMPACT

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Net Futures - The Egg - Brussels



Main Findings

Accelerators - excellent at attracting SMES

Attracting lots of young, eager start-up companies

Start-Ups have mature plans and realistic business models

FIWARE not completely aligned with real market potential

Methodology

Original Submitted Proposals



SME Info database

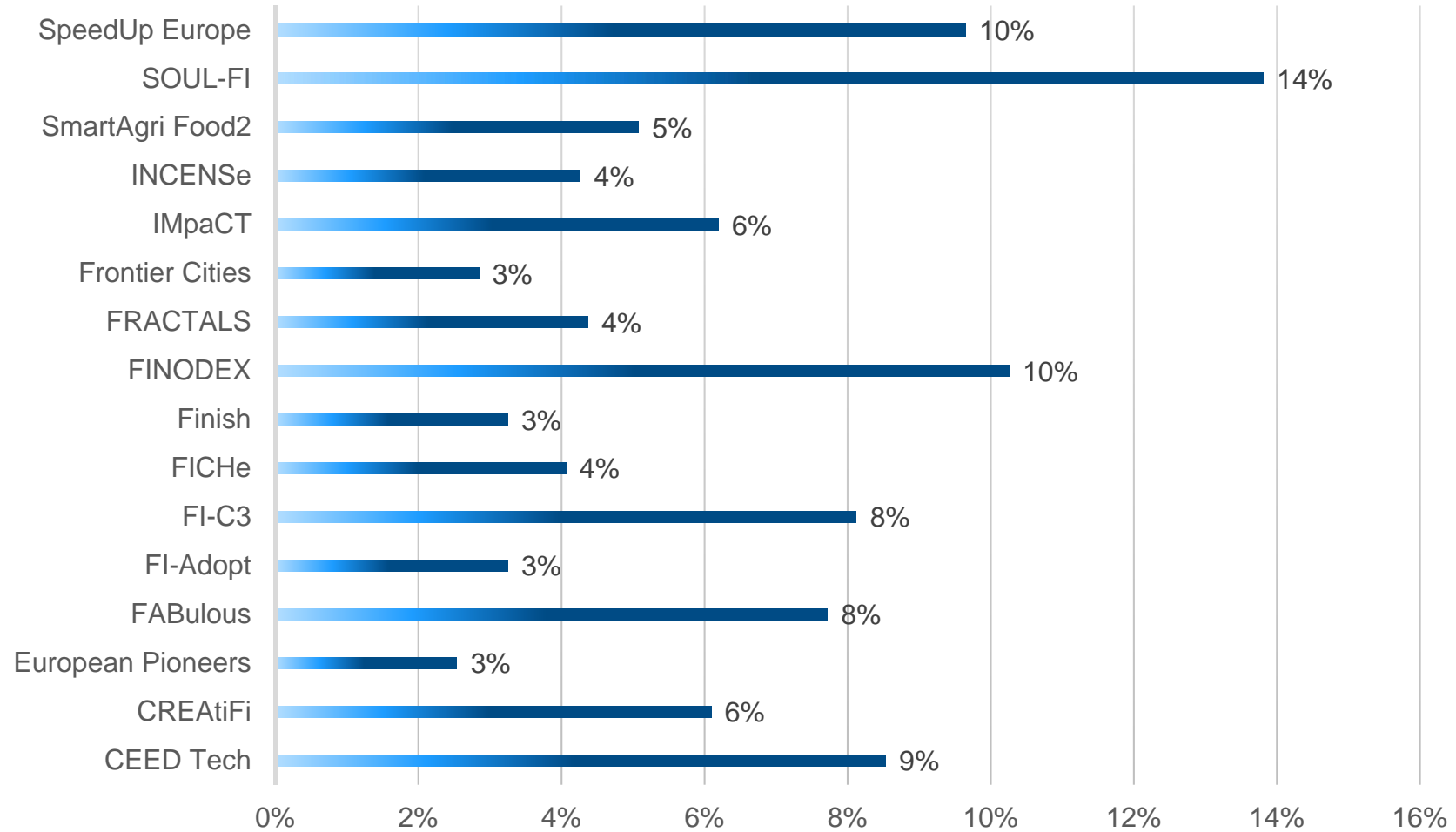


Sub-Grantee Survey

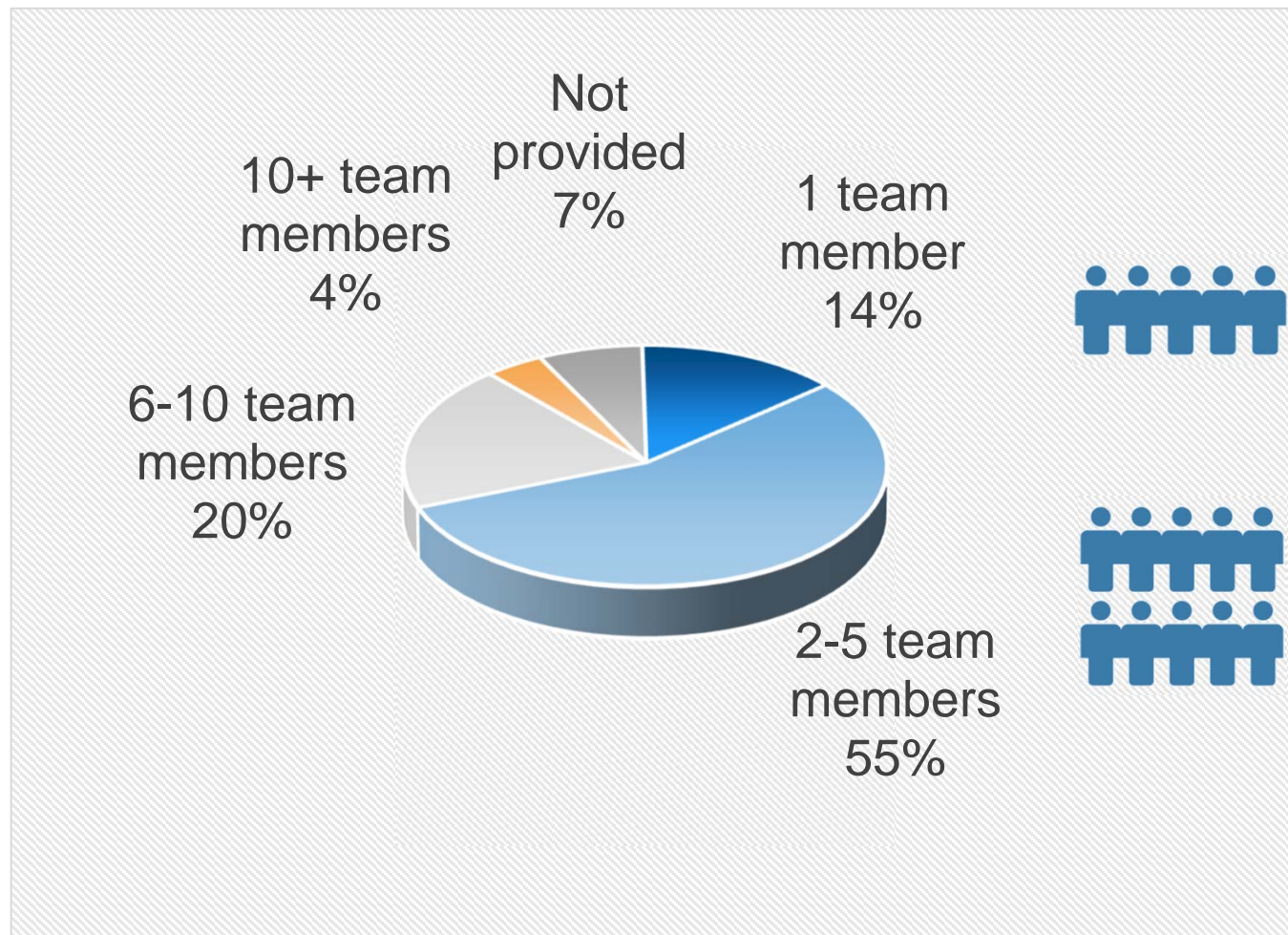


Mattermark database

985 Companies funded by FIWARE



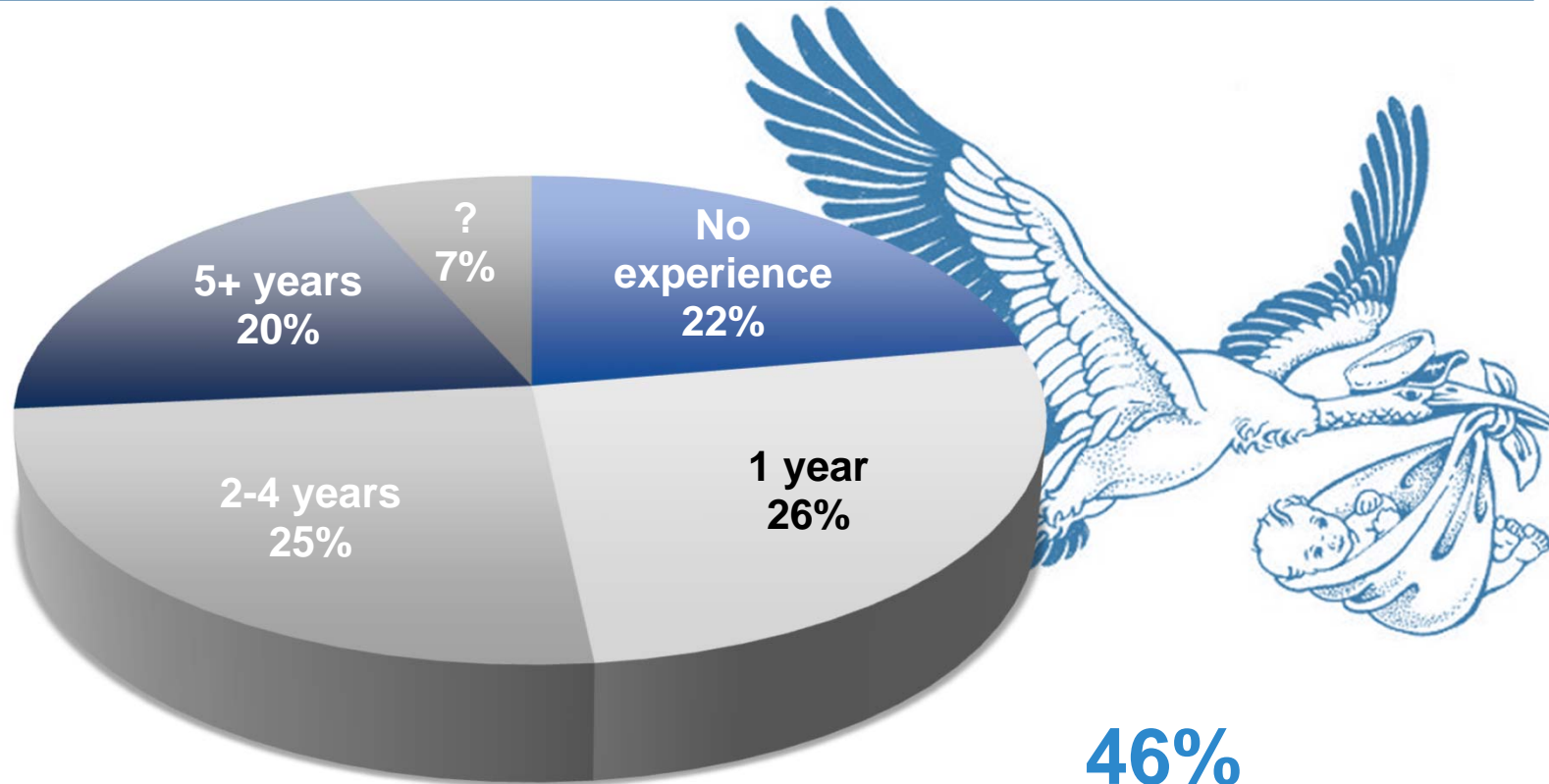
Mostly Small Companies



69%
Have **small** teams
(1-5 members)

24%
Have **medium**
size teams
(6+ members)

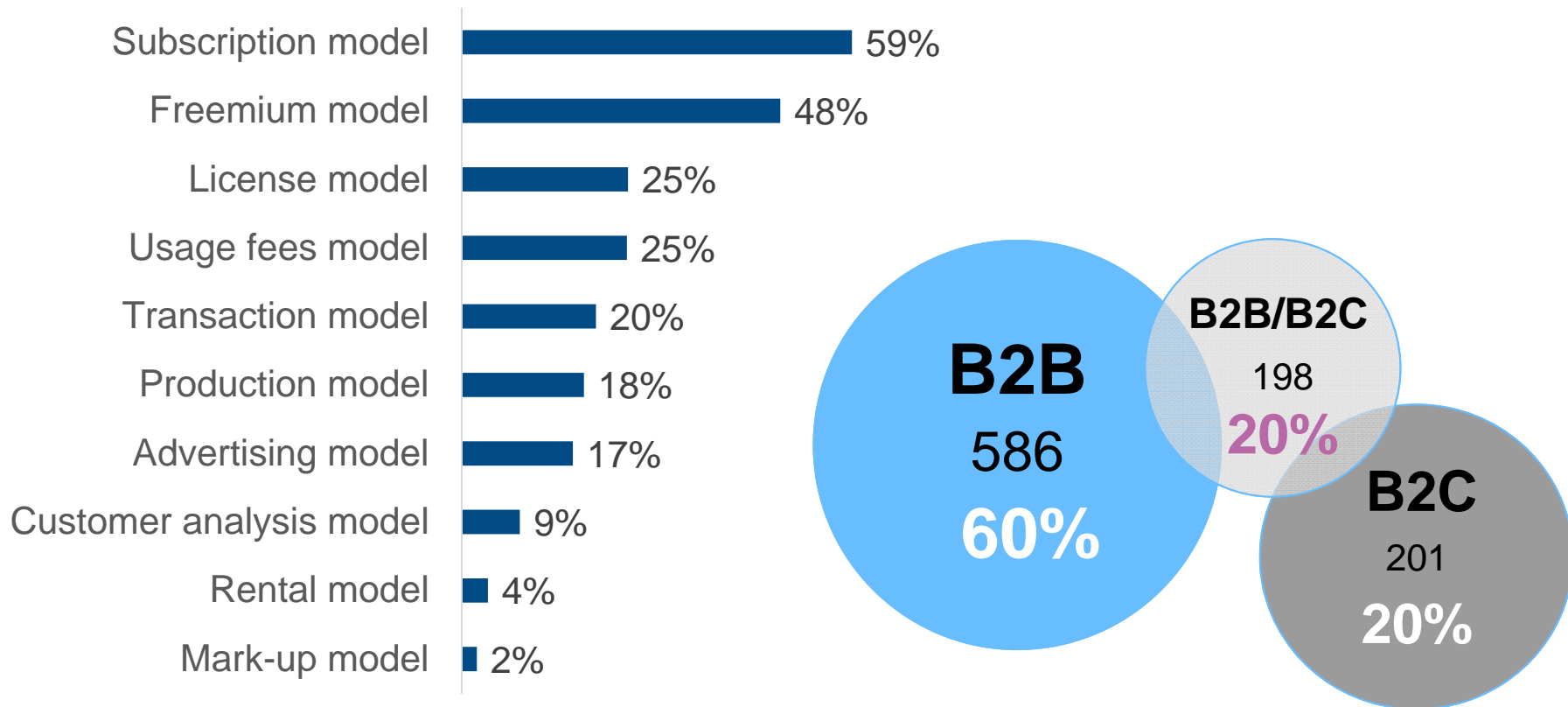
Mostly Young Companies



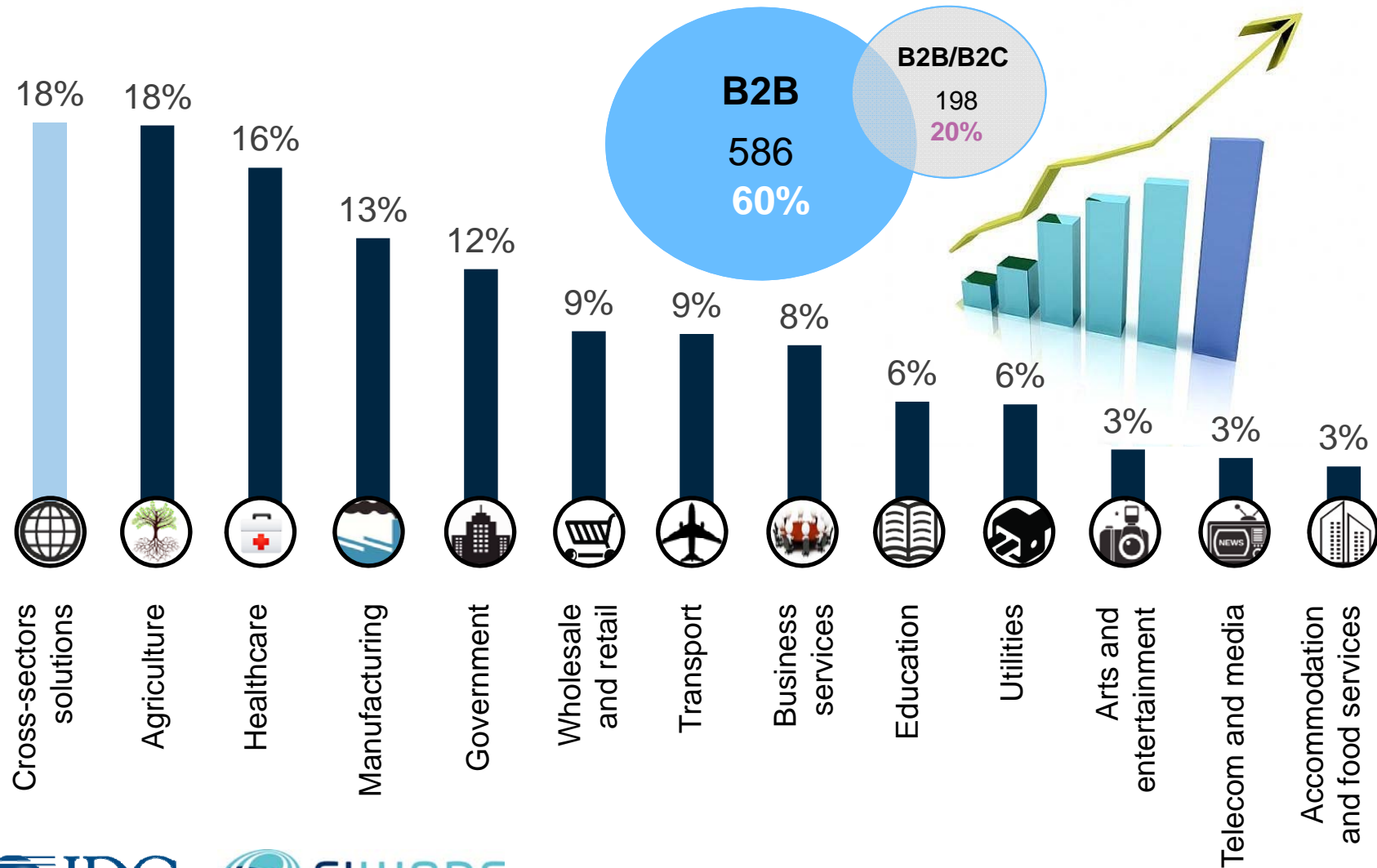
46%

Are start-ups that were
BORN WITH FIWARE

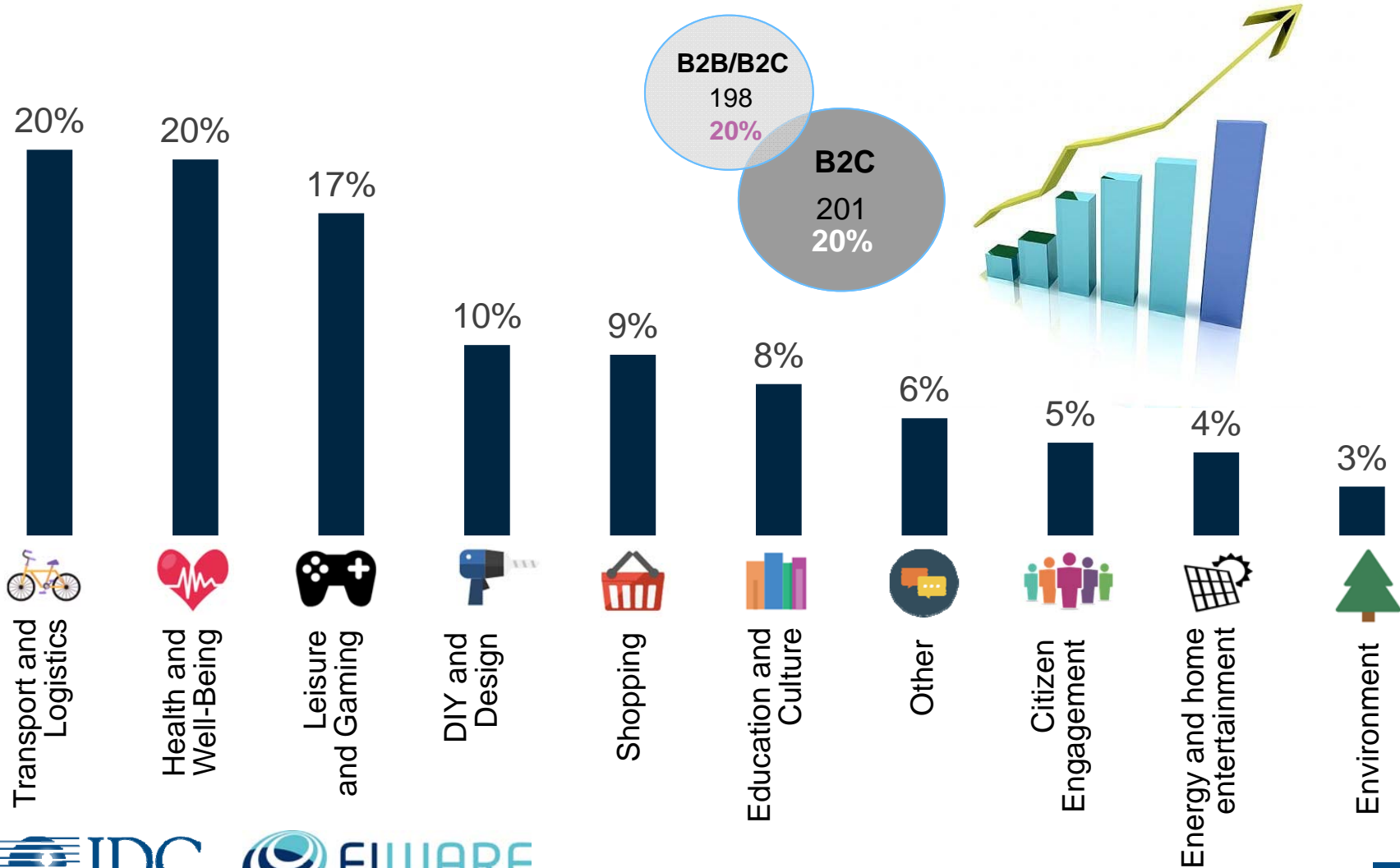
Tested Business Models & Approaches



Business Sectors B2B



Consumer Market



Potential Market by 2020

■ Optimistic Scenario:

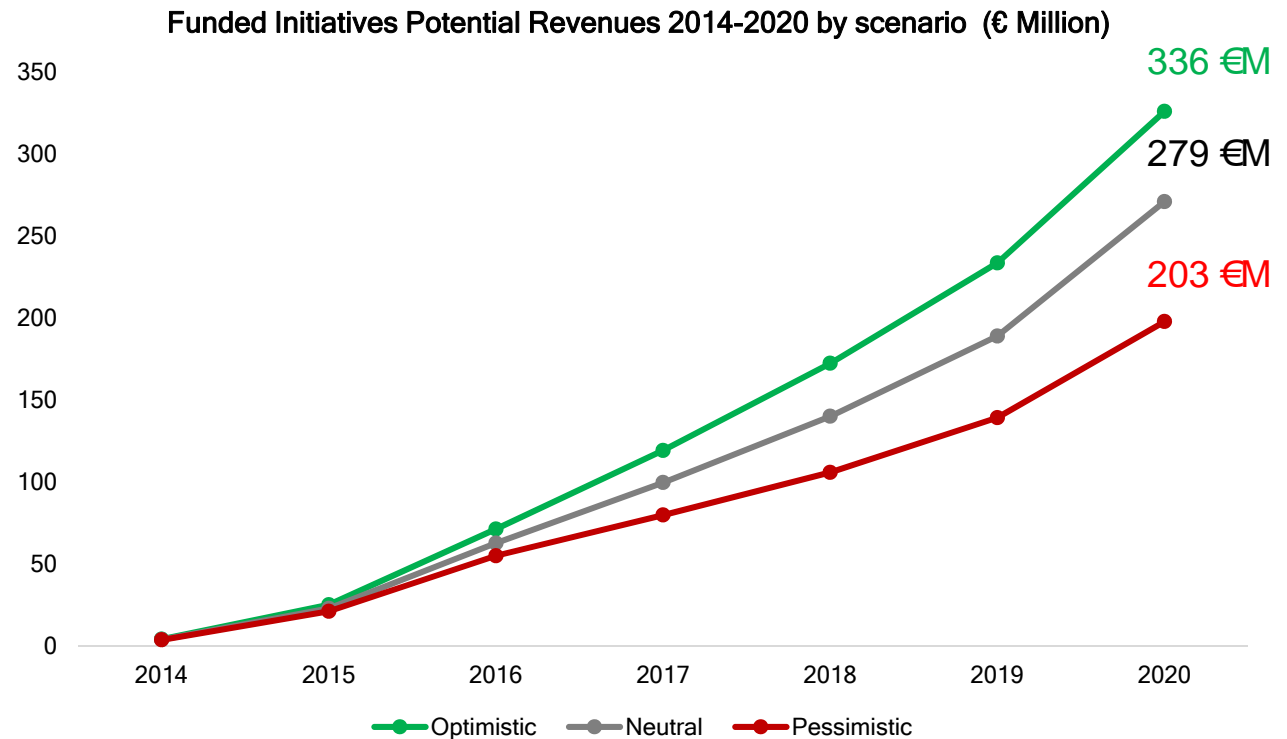
- Good match with potential demand
- Death Rates: 33% of initiatives

■ Neutral Scenario:

- Most likely match with potential demand
- Death Rates: 46% of initiatives

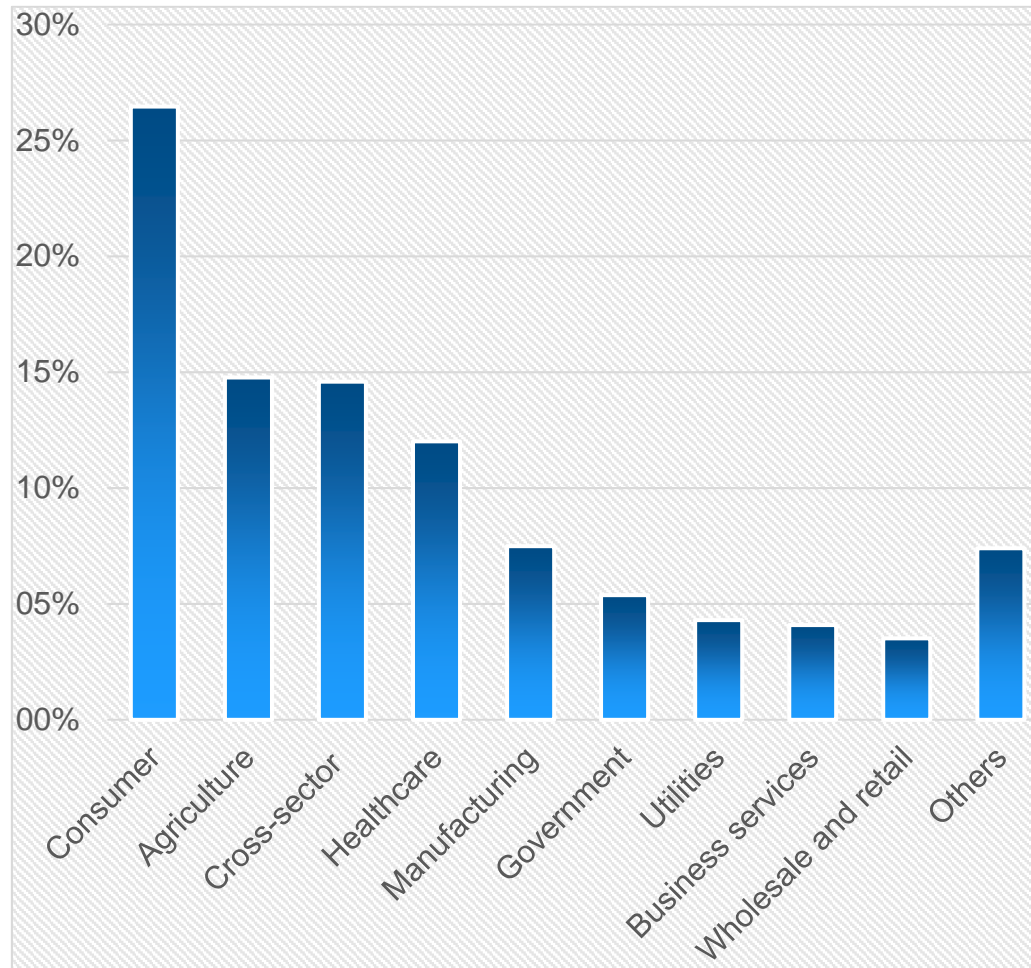
■ Pessimistic Scenario:

- Weak match with potential demand
- Death Rates: 60% of initiatives



Source: FI-IMPACT Market Model 2.0, October 2015

Revenue - Focus on Emerging Markets



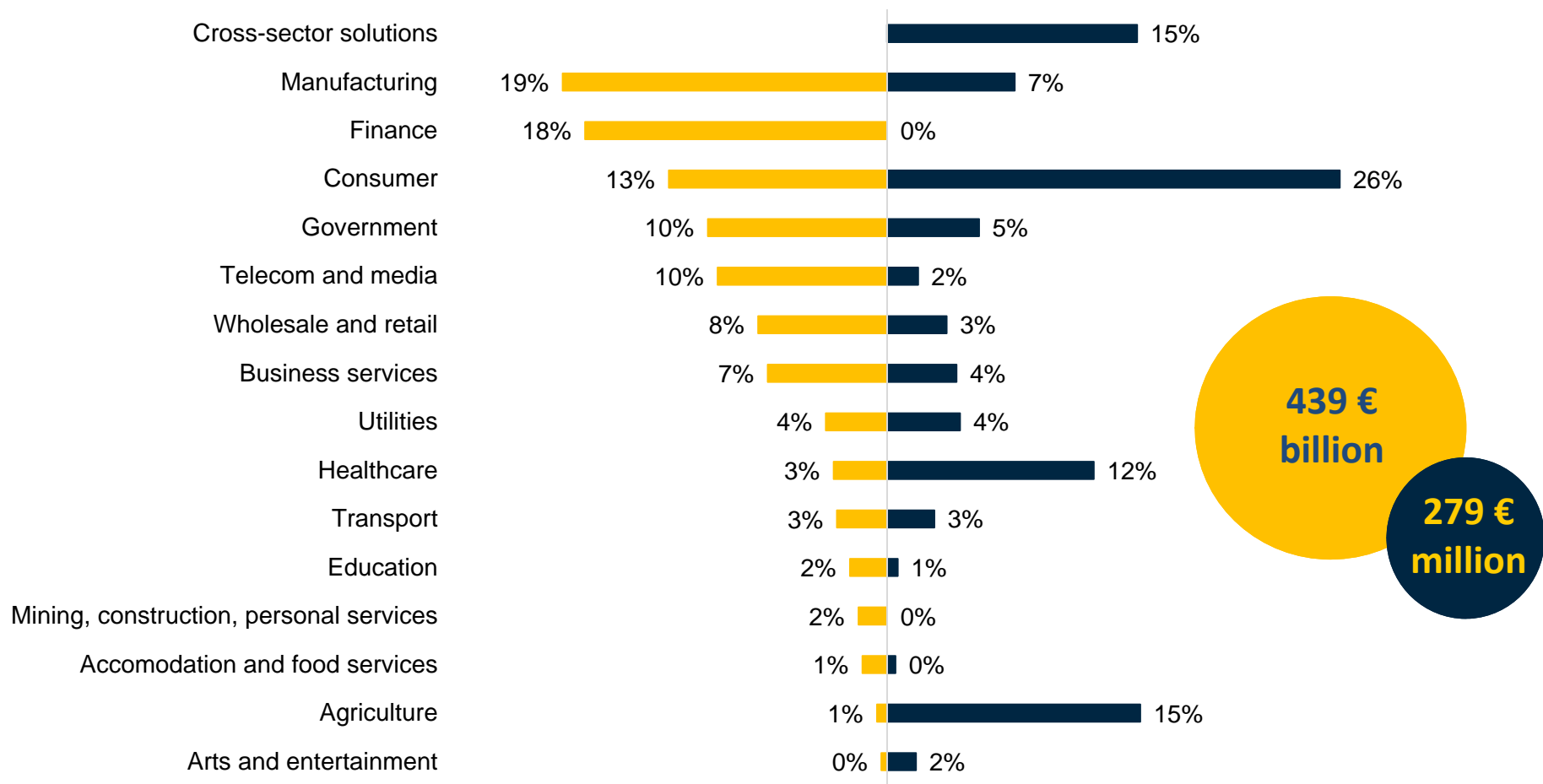
Total: 279 €M

Estimated Revenues in 2020
by sector

Initiatives Footprint by Industry in 2020

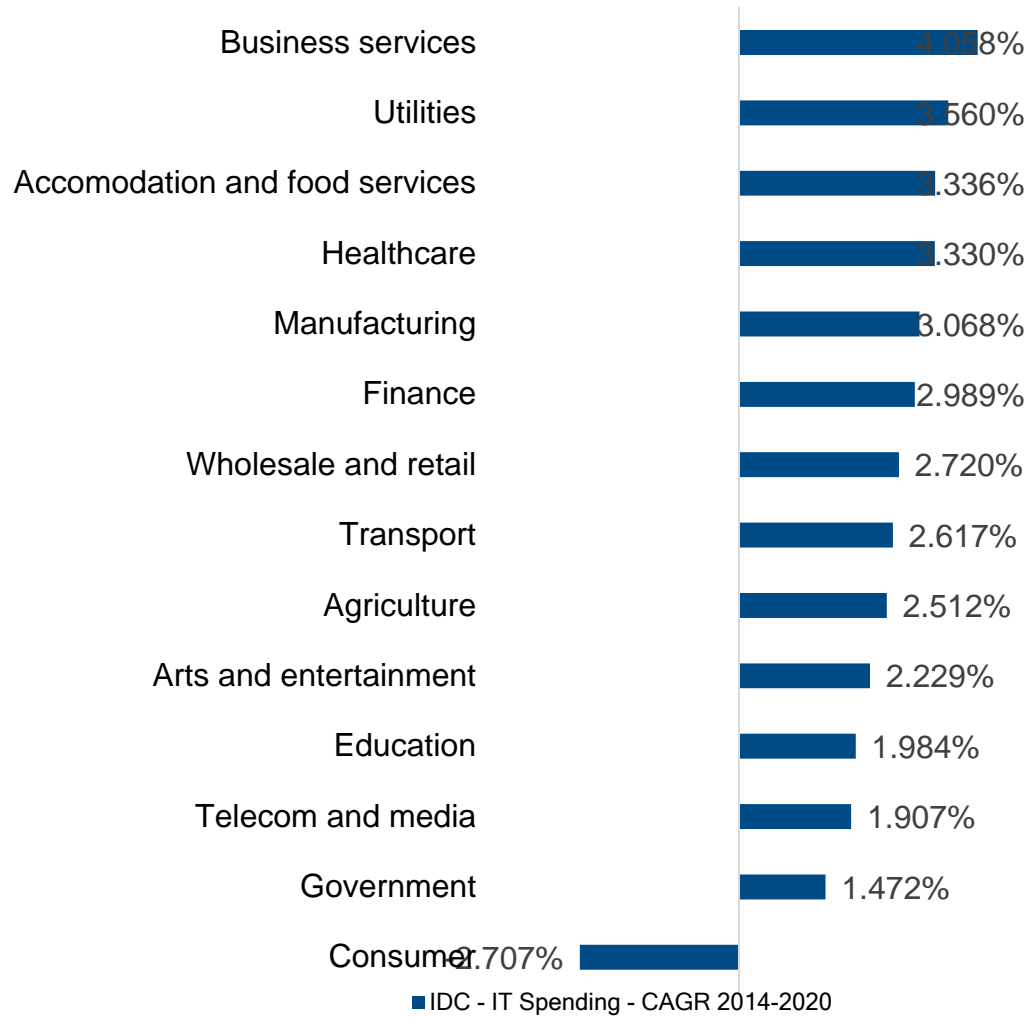
Total IT spending estimate in EU 28
(%) by Industry Sector

Revenue Forecast of Funded
Initiatives (%), By Industry Sector

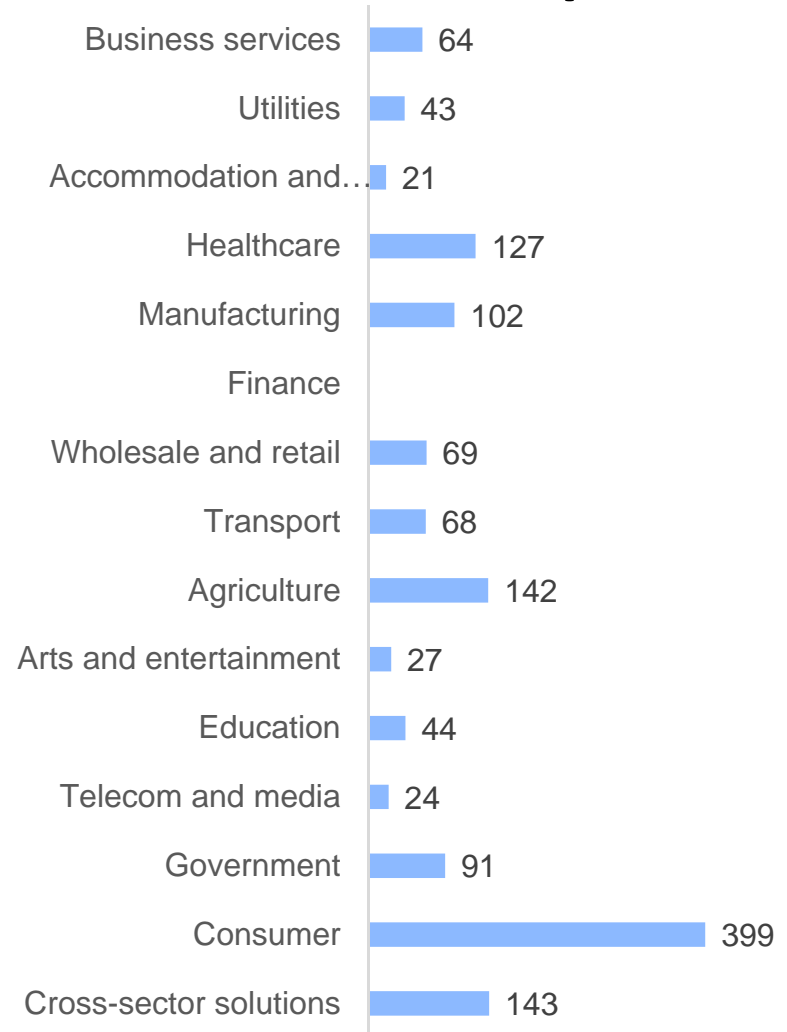


Footprint by Industry in 2020

IT Spending Growth

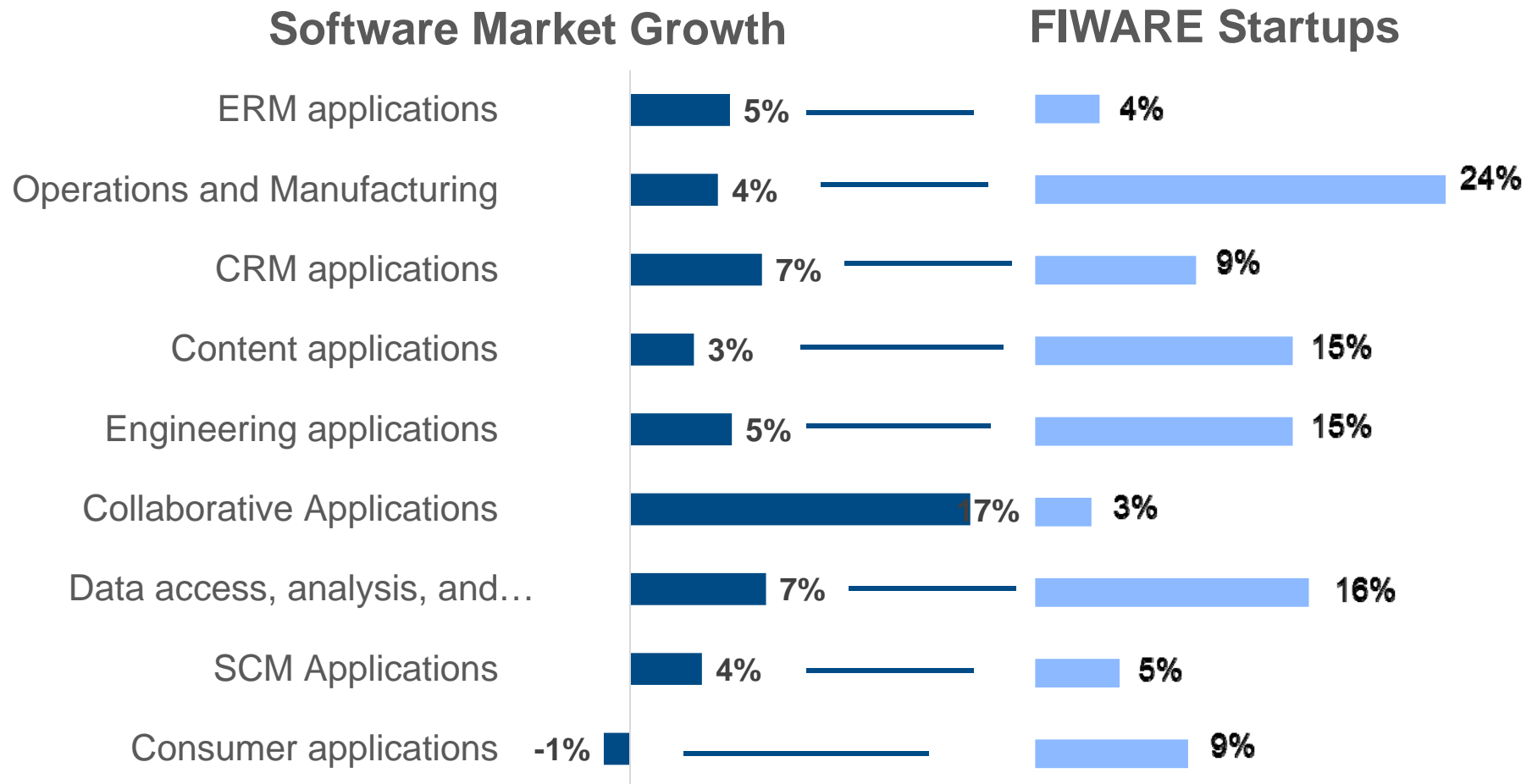


FIWARE Startups



n = 985 selected proposals; base = 16 accelerator, April 13^o 2016

Pure software: Growth vs Startups



n = 430 selected proposals with software solutions; base = 16 accelerator, April 13^o 2016

Key Findings and Reflections

- **Accelerators - excellent at attracting SMES**
 - a model that should be followed by other initiatives: from 985 funded initiatives, by the year 2020 there are likely to be approximately 450 companies in Europe leveraging Fiware. 99% of these companies will be microenterprises.
- **Young, growing companies**
 - “creating employment”, for more than 30% of initiatives this is the “First Job”. Of those reported companies have already created about .06 jobs per Start-up.
- **They have mature realistic business models**
 - Most start-ups have mature plans with concrete business ideas. Start-ups showed great attention to this factor. Percentage of Subscription and Freemium Business models matches industry averages.

Key Findings and Reflections II

■ Profile by Technology

- The companies offering **Pure Software** solutions are the most frequent, but the HW and SW (mainly IoT) companies and non-IT companies have greater chances of success because their markets are less mature and potentially with higher potential

■ A Wide Footprint across the EU Economy

- Almost half of the funded initiatives are developing either cross-sector solutions. This shows that FIWARE-based innovation has a broad relevance across the EU economy and the influence of the Programme extends beyond narrow or specific niches

■ Focus on Emerging Markets

- The top ranking sectors by number of funded initiatives and share of potential revenues are Agriculture, Healthcare, Manufacturing, Government; these are not the top ranking sectors in terms of potential IT spending to 2020, according to IDC. However, they are sectors with high potential and high barriers, where innovative companies can play an important role.

Key Findings and Reflections

■ Relevant Market Impacts

- FIWARE initiatives should generate approximately 279 € Million euros in revenues by 2020
- If these companies match demand needs, revenues could be as high as 336 € Million (Optimistic scenario); if many have made wrong decisions, they could be as low as 203 € Million (Pessimistic Scenario)
- One superstar company with exceptional success would be enough to add more than 250 € Million to these estimates (Superstar Scenario)
- The companies born from Phase III will reach a user population of approximately 643 Thousand businesses and 13.7 Million Consumers

■ Return on Phase III Investment

- Considering the 55-80 € Million investments in the FI-PPP Phase III, a valuable return on investment for Europe

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FIWARE



FIWARE Start-ups are not socially excelling

How much they're active on the social media:

51% are on Facebook



1800 average Likes
+136k max. Likes

48% are on Twitter



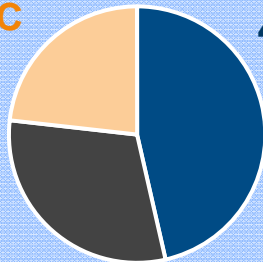
900 average Followers
+47k max. Followers

21% are on LinkedIn



88 average Connections
+2k max. Connections

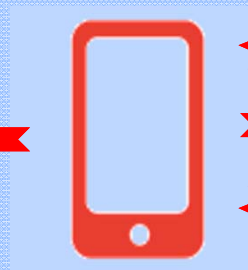
B2B/B2C
, 23%



B2C,
46%

B2B,
30%

8%
Have a mobile app



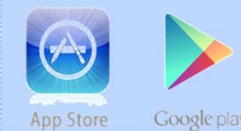
Which channels are used for their apps?



54% Have a Google App



29% Have a iOS app



18% Have both