PLUGANDPLAY

Global IT Industry Trends

pnptc.com

Stay in touch

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PLUG AND PLAY

Overview

Our Beginnings: The “Lucky Building”

Google

logitech

PayPal

DANGER

A global sourcing platform

STARTUP ECOSYSTEM

50,000+

▲ 1,500 per year

GLOBAL LOCATIONS

47

▲ 1 per quarter

INDUSTRIES COVERED

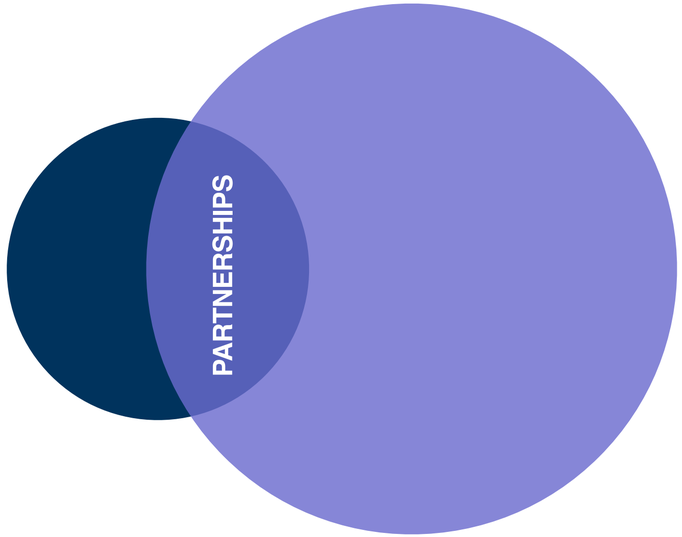
19

▲ 1 per quarter

We connect the best startups to the world's largest corporations.

Corporations

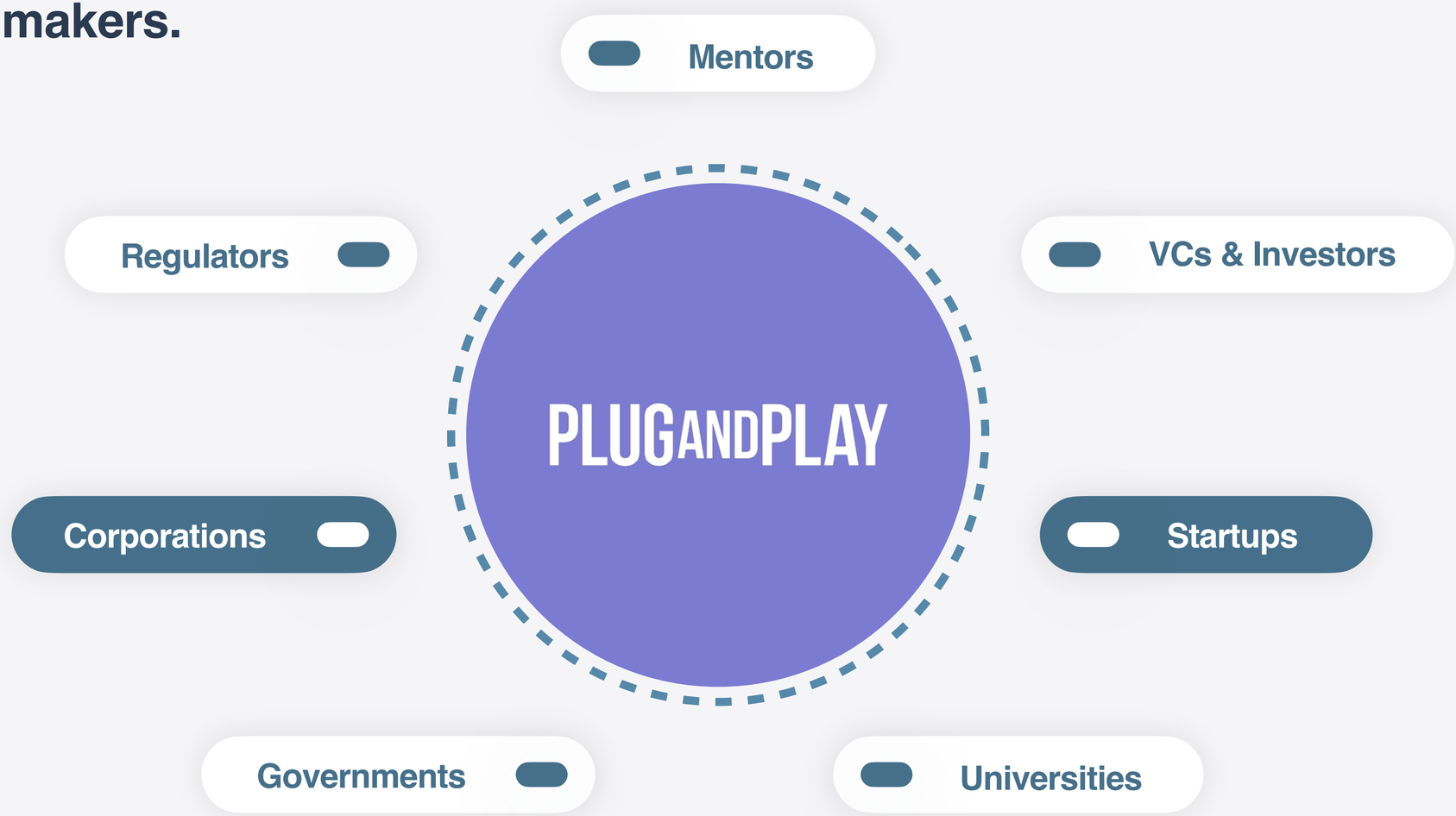
Industry leaders and top-level executives



Startups

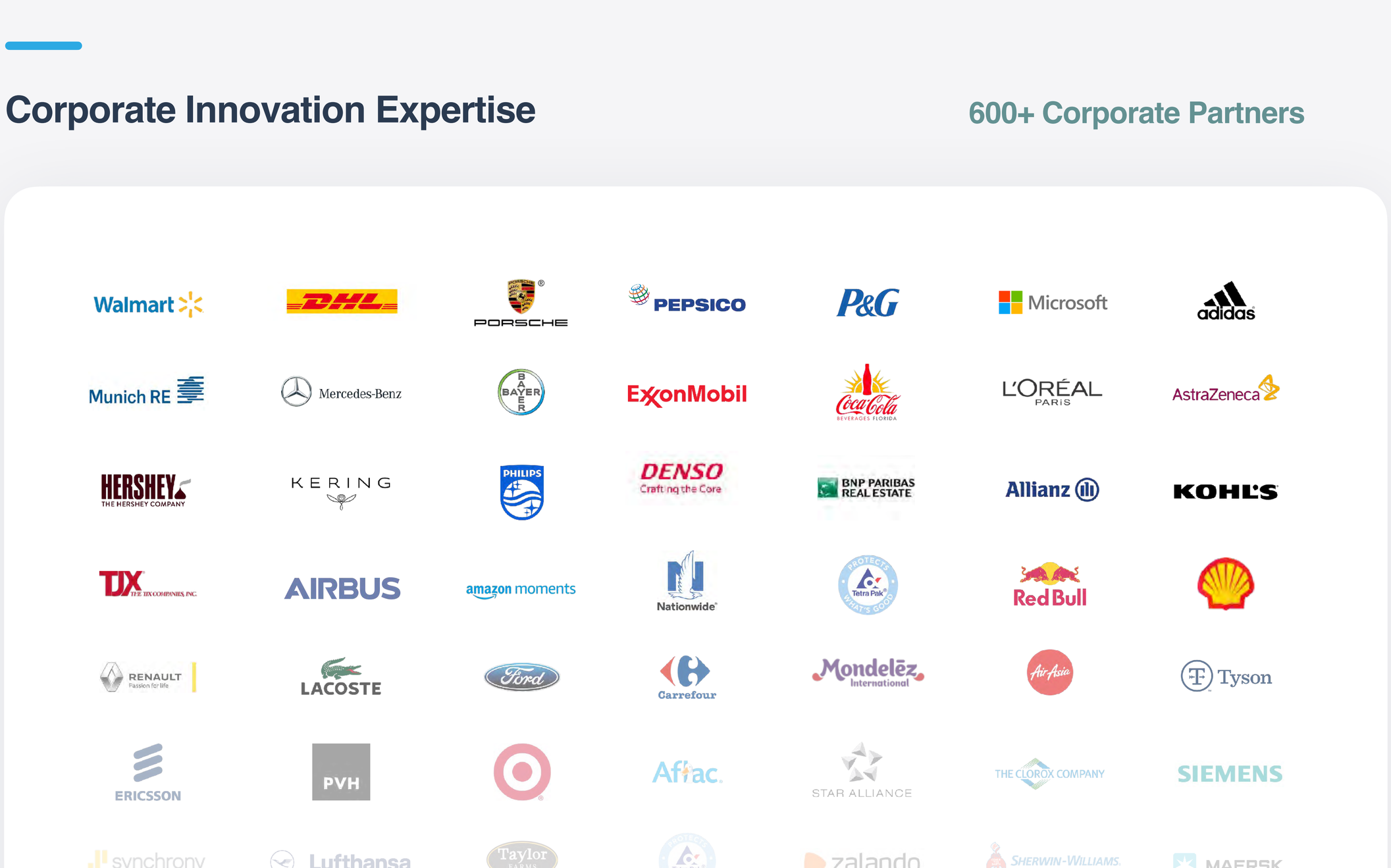
The brightest minds and innovators on the planet.

An ecosystem of change makers.



Corporate Innovation Expertise

600+ Corporate Partners



Our Unicorns

*Order by Date

PayPal
LendingClub
Dropbox
SoundHound
Rappi
GUARDANT
N26
Quantenna
hippo
honey
Course Hero
ApplyBoard
Kustomer
BigID
Flutterwave®
FiscalNote
shippo
Trulioo
TRACTABLE
BLOCKDAEMON
FLYR
cloudwalk
OWKIN
MANSCAPED
Turing
Truebill
SUSU
visby medical
FLEXIV

Programs

- Agtech
- Animal Health
- Brand & Retail
- Energy
- Enterprise Tech
- Fintech
- Food & Beverage
- Health
- Insurtech
- IoT
- Maritime
- Media & Ad
- Mobility
- New Materials & Packaging
- Real Estate & Construction
- Smart Cities
- Supply Chain
- Sustainability
- Travel & Hospitality
- Coming soon

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- Travel & Hospitality
- Coming soon

PLUG AND PLAY

Fintech Trends

PLUG AND PLAY
FINTECH

Our Fintech platform is helping 70+ financial institutions to adapt to a new industry landscape defined by technology and innovation.

Present in over 10 locations in 4 continents, our Fintech program focuses on topics such as payments, wealth & asset management, open banking, regtech, or artificial intelligence.

2014
Year Launched

363
Total Pilots

62
Total Partners

500+
Startups Accelerated

Recent FinTech Trends

What happened in the Fintech ecosystem since the beginning of 2022?

Fintech investments are slowing down from 2021 highs, with **total investments in H1 2022 of $13.2b**, the lowest 6-month total since 2020.

Fintechs' valuations have dropped. **Klarna is valued at $6.5b** ($45.6b in Jun 21), while **Stripe cut its valuation to $68.4b** ($95b in Mar 21). The overall valuations are still growing.

Despite investment decrease, **Fintech is expected to remain a strong focus for investors**, who will focus more on profitability and cash flows.

Payments continues to attract the most funding

Amount raised by fintech sub-sector in 2022 to date

Sub-sector	Amount raised
Payments	$3.8bn
Wealth management	$3.4bn
Banking	$2.9bn
Financial management solutions	$2.7bn
Mortgages & lending	$2.2bn
Insurance	$1.4bn
Crypto and DeFi	$1.3bn

Recent FinTech Trends: European Perspective

What are the biggest Fintech trends in EUROPE?

Digitization of **B2B payments enabled by the adoption of Open Banking in Europe** is underway. Yet there is still a great deal of complexity in adopting the technology on a wider scale.

Payment infrastructure for digital business

paddle
cleverbridge
numeral

AR automation

upflow.
Sequence
crezco
GOCARDLESS

B2B BNPL & Financing

mondu
BILLIE
two.
biller
HERO
payper
sprinque

B2B checkout

Payer
Rapyd

AP automation

Monite
tipalti

- The pandemic pushed businesses online, boosting B2B payments growth, which is estimated to reach $640b by 2030 with a CAGR of 9.4%.
- B2B payments are expected to be 5x larger than B2C in terms of volume by 2028.
- Yet, certain constraints limit B2B transactions to be as frictionless as B2C sales including higher *price sensitivity* (transaction fees), *procurement & permissions* needed, and payments with a *deferred payback period/ credit*.

Recent FinTech Trends: European Perspective

What are the biggest Fintech trends in EUROPE?

2021 was a record year for **cybersecurity** startups globally, and in 2022 the momentum continues. Banks are doubling down on their security budgets this year to protect against cybersecurity threats.

Category	Offering	Companies
Threat Detection & Protection	Vulnerabilities Management / Security Policies Dev.	GATEWATCHER
Fraud Detection	Client's Fraud Detection	SHIFT
Attack Simulation	Human Risk Management / Awareness Trainings	sosafe
Data Protection & Recovery	Data Loss Prevention / Disaster Recovery	Acronis
Cyber Insurance	Data Collection for Better Cyber Insurance Pricing	panaseer
API Protection	API Observability / Access Management	gravitee.io

TechCrunch

Revolut confirms cyberattack exposed personal data of tens of thousands of users

Revolut, which has a banking license in Lithuania, wouldn't say exactly ... including 20,687 customers in the European Economic Area and 379...

1 week ago

FinTech Global

Acronis bags $250m in BlackRock-backed funding round

The investment also saw participation from CVC Capital Partners VII and other investors. Acronis has previously received financial banking from...

Jul 29, 2022

Tech.eu

Cybersecurity awareness firm SoSafe makes jump to plaid ...

SoSafe, a Cologne-based startup that provides a cybersecurity training platform to corporate clients, has raised $73 million in a Series B...

Jan 13, 2022

Recent FinTech Trends: European Perspective

What are the biggest Fintech trends in EUROPE?

CFO tools for SMBs empower CFOs to replace tedious tasks with automation, enabling collaboration and aggregation of multiple tools under one umbrella.

Controllership

Accounting / Expense Management

Pennylane
indy
Likvido
Kontist
fonoa
moss
finway
payhawk
taxfix
SPENDESK
PLEO
soldo
symmetrical

FP&A

Cashflow Management / Planning

Airbank
AURELIA
Sibill.
tidely
AGICAP
upflow.
Abacum
Pigment
Growblocks
CAUSAL

Treasury

Treasury / Equity / Financing

treasury spring
semper
Capdesk
Ledgy
wayflyer
uncapped
BILLIE

- Europe is the second biggest global finance and accounting market expected to hit €921m by 2025.
- Germany is the largest European market in the space, making up around 50% of the value.
- VCs have poured a record amount of $66.5m into European CFO tech stack startups this year.
- Each EU country has its own accounting methodologies and tax regulations, hence building a one-stop-shop fits it all is a challenge.

PLUG AND PLAY

InsurTech Trends

PLUG AND PLAY
INSURTECH

New technologies are transforming the insurance value chain for good, and we are taking this industry into a new space.

Since the inception of the Insurtech program in May 2016, we have brought together the best startups and largest insurers into one innovation platform.

2016
Year Launched

100+
Total Pilots

57
Total Partners

600+
Startups Accelerated

Some of the Insurance Trend Areas

Product	Sales	Underwriting	Customer Service	Claims
Product Builder	Embedded Insurance	Predictive Analytics	Omnichannel Customer Journey	Automated Claims Payment / RPA
IoT/Sensors	API-Ability	Health Monitoring	Chatbot + NLP	Mobility Damage Assessment
Connectivity Risk	Lead Generation	Dynamic Pricing in Insurance	Customer Insights	OCR Technology
Gig economy and Freelancers	ROPO/ROBO	Parametric Insurance	Voice Based Assistant	Agriculture and Industrial Claims
Cyber Insurance	Agent Support	Data enrichment & alternative Data Sets	Customer Engagement	Health Claims Submission
Climate Risk	Digital Brokers, MGAs, Full Stacks,		Gamification	Fraud Detection

Enabling Technologies

Artificial Intelligence / Machine Learning

AI & ML are the new data analysts of tomorrow.

In real-time and continuously improved accuracy, these models enable companies to give a feeling of complicity to each one of their customers through high-personalisations and increased presence in various areas of their life.

Image Processing

Image processing enables the customer to communicate without needing to utter a word.

Customers can share data in real-life with less effort and enable insurance companies to have a better trust with them by helping them in a fast, relevant and reliable way

Augmented Reality

AR is a technology that mixes the physical and digital worlds.

It is of very interactive nature and enables a better transmission of complex topics from the seller to the buyer and an opportunity for insurance companies to be a trusted and relied upon support.

Internet of Things

Long gone will be the days that insurance companies only get sporadically contacted.

With IoT, companies can have many touchpoints in many different moments and areas of the user's life. With such data analysis possibilities, prediction & on point product offers will become evident.

Drones / Satellites

In combination with image processing, drones are an advanced tool to make real-time assessments in high-risk & damage areas and effortless, continuous monitoring for predictive analysis and valuable data collection.

Drones are the gateway to a bird's view analysis of a situation.

Blockchain

Blockchain is disrupting many industries.
It enables a secure, automated and transparent data transmission through its decentralized nature.

For customers this translates into trust and data control coupled with speed and efficiency.

Shift Technology

Xtract

blippAR

Hippo

FAIR FLEET

ensuro

PLUG AND PLAY

Enterprise Tech Trends

PLUG AND PLAY
ENTERPRISE TECH

Our Enterprise Tech innovation platform is dedicated to disrupting the foundational status quo of every company through a wide range of focus areas, such as big data, customer experience, human resources, or cybersecurity.

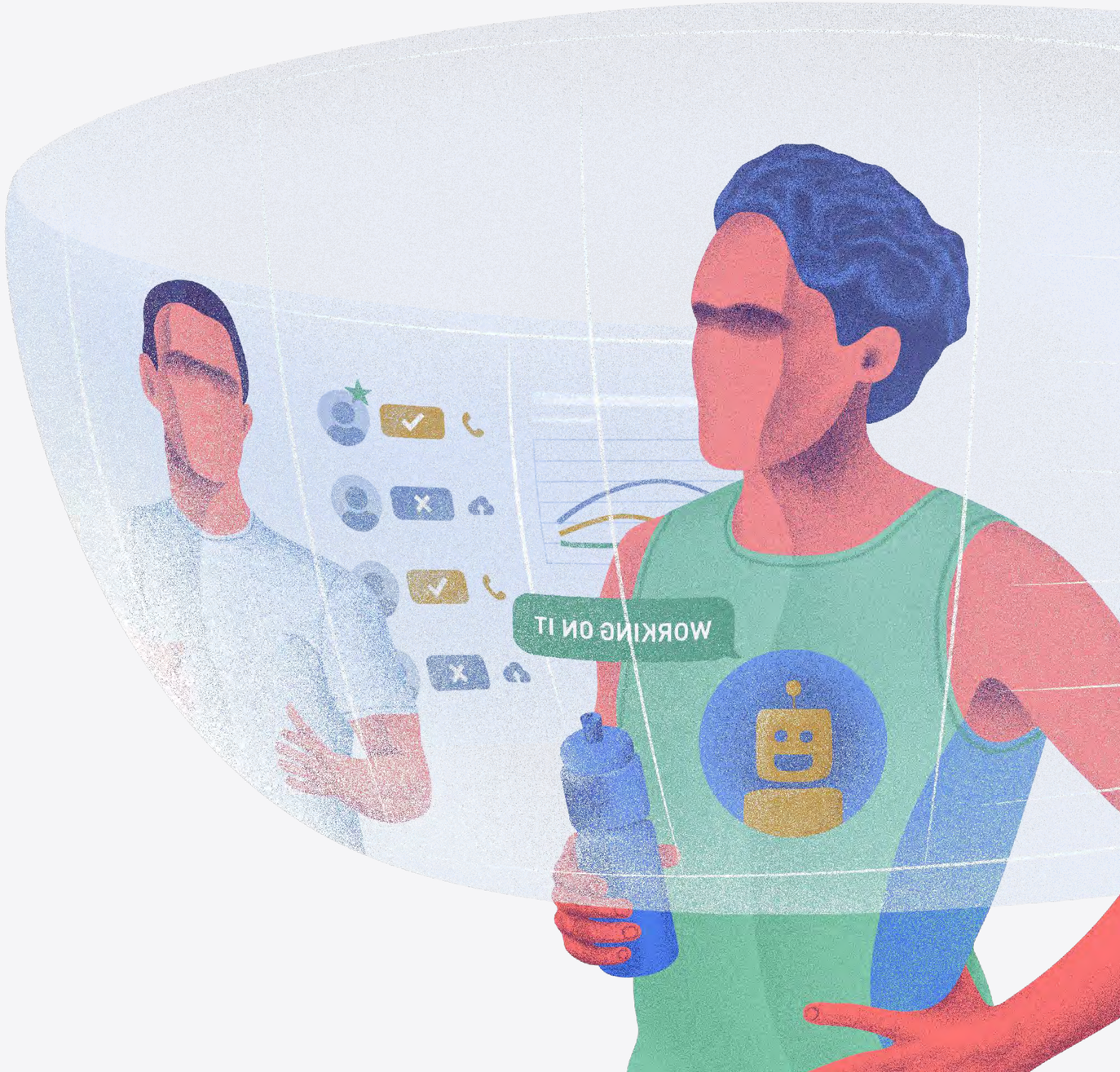
Accelerating digital transformation through the adoption of emerging technologies that improve efficiency, customer experience, organizational culture, and security.

2020
Year Launched

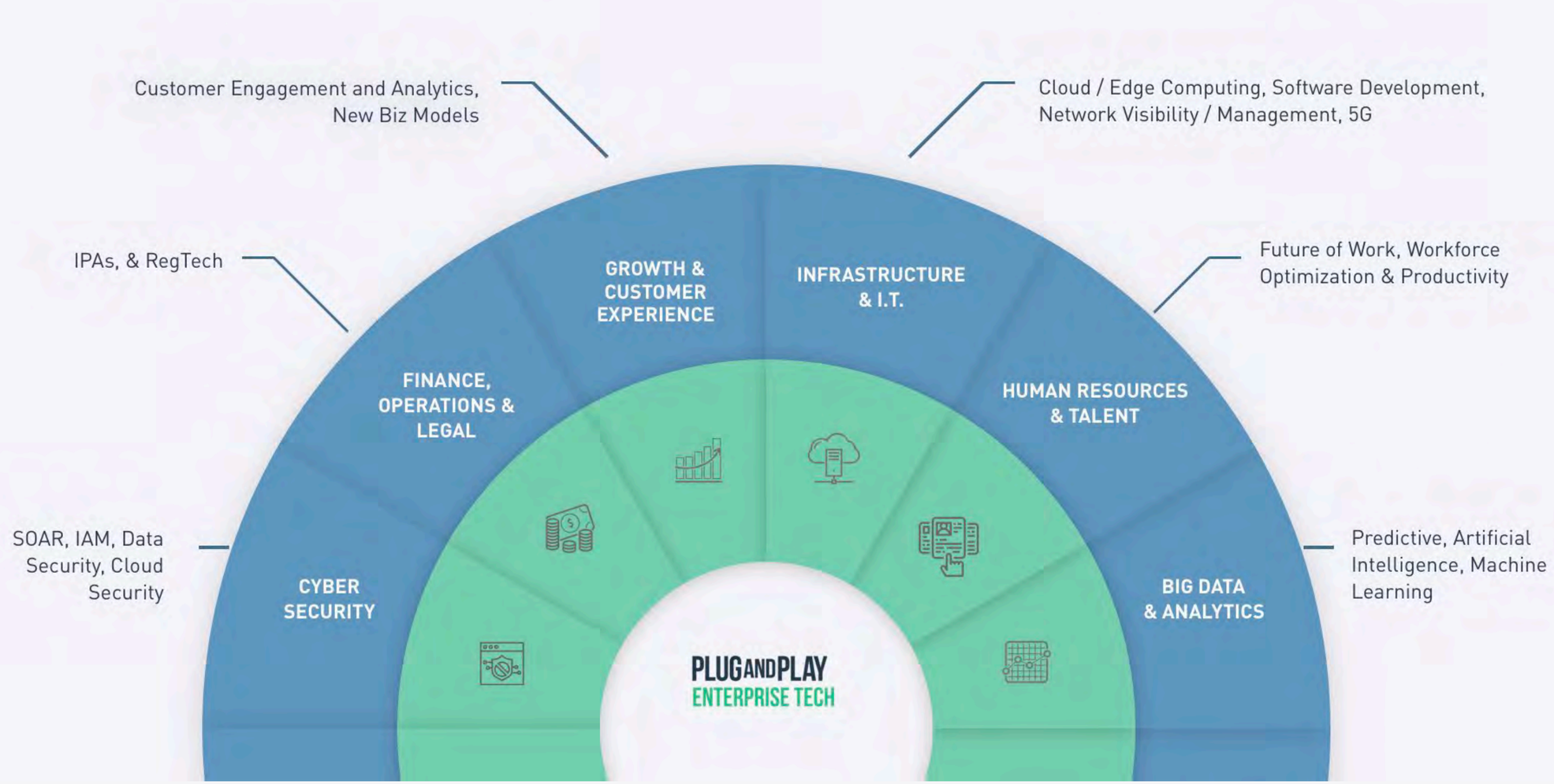
02
Total Locations

12
Total Partners

100+
Startups Accelerated



Enterprise Tech Trend Areas



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The ultimate innovation platform.

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