The next digital startup success story?!
Munich has a unique profile as a leading industrial high-tech cluster

German and international global players in Munich’s industrial cluster

| Software, ICT and Media | Google | Yahoo! | ARD | Constantia Film | Victoria | MGM Group | T-Systems | Oracle | Apple
|------------------------|--------|--------|-----|----------------|---------|----------|----------|-------|-------
|                        | Fujitsu| Microsoft| ProSiebenSat.1 Media Ag | Amazon | ARRI | Scout 24 | Sky | Hubert Burda Media |
| Mobility, Smart Cities | BMW | Daimler | Audi | SIEMENS | Knorr-Bremse | IABG | Flixbus | ADAC | SIAT | adidas | NextEV |
| Med Tech, Bio Tech, Life Sciences | Novartis | Roche | SANDOZ | Wacker | Fresenius | BioNTech | GE Healthcare | KLINIKUM | IMH | MRI | Schönborn | Siemens Healthineers |
| Insurance and Banking, CyberSecurity | Allianz | Munich RE | Swiss Re | MEAG | Axa | SwissLife | WWK | Klarna | CHECK24 | Wirecard | Gieseck & Devrient | secunet | thyssenkrupp |

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Many new startups evolve in Munich’s industrial cluster

**Selection of Munich’s startup portfolio**

<table>
<thead>
<tr>
<th>Software, ICT and Media</th>
<th>3dTrust, 4tiitoo, bevotec, Franka, ProGlove, Lectorian, Celonis, Bitkom, InflightVR, blick, Heyigt, evalu</th>
</tr>
</thead>
<tbody>
<tr>
<td>IoT, Industry 4.0, Additive Manufacturing</td>
<td>Konux, Motius, fos4x, tradico, vectoflow, SIOENS, Dynamic Components, KINEXON, ThinxNet, Viscopic</td>
</tr>
<tr>
<td>Mobility, Smart Cities</td>
<td>NavVis, ulium, FAZUA, ParkHere, TIC DMC, GlassChair, Spectrum, BetterInk, fleetster, riding, tado, elcomax</td>
</tr>
<tr>
<td>Med Tech, Bio Tech, Life Sciences</td>
<td>4SC, Attaccube, Gena, Attacube, Spheronics, X-Protein, Rigontec, Finotec, Ethris</td>
</tr>
<tr>
<td>Insurance and Banking, CyberSecurity</td>
<td>Fintech24, neon, ottonova, IDnow, treefin, BILENDO, Altruia, Payworks, epay, NOVALNET</td>
</tr>
</tbody>
</table>
Over 100 support organizations nurture the Munich startup ecosystem

Selection of private and public organizations and initiatives

**Competition**
- BuyStartUp
- ISPO
- StartUp

**Entrepreneurship Centers**
- unternehmertum
- ENTREPRENEURSHIP CTR.
- Social Entrepreneurship Academy

**Coworking Spaces**
- CDTM
- ENTREPRENEURSHIP CTR.
- WERK 1

**Education Programs**
- CDTM
- Digital Product School
- MBA INNOVATION & BUSINESS CREATION

**Conferences**
- DLD
- Bits & Pretzels
- TU München Techventure

**Universities**
- LMU
- Technische Universität München

**Research Institutes**
- Fraunhofer
- Helmholz

**Government**
- Bayerische Landesregierung
- Landeshauptstadt München

**Accelerators**
- Gate
- IZB
- MGH

**Coworking**
- Coworking 4.0
- Alumni Netzwerk

**Hackerspaces**
- Idea Kitchens
- all-in

**Corporate Incubators**
- Accelerate
- smartvillage

**Company Builders**
- Gravity

**Design**
- Frog
- designaffairs

**Digital Products**
- Stylight
- DieProduktMacher

**Accounting**
- Deloitte

**Attorneys**
- Noerr

**Strategy Consulting**
- BCG

**Patents**
- Goepel

**Recruiting**
- Russell Reynolds

**Associations**
- VDZ
- Digitale Wirtschaft Bayern

**Universities**
- Munich University

**Associations**
- IHK
- München

**Research Institutes**
- Fraunhofer
- Munich Startup

**Corporate Incubators**
- Airbus
- Wayra

**Laboratories**
- HIS Lab

**Corporate Incubators**
- Munich Startup

**Strategy Consulting**
- EY

**Patents**
- German Patent and Trade Mark Office

**Accounting**
- Price Waterhouse Coopers

**Attorneys**
- Noerr

**Strategy Consulting**
- Deloitte Digital

**Patents**
- German Patent and Trade Mark Office

**Accounting**
- PwC

**Attorneys**
- Noerr

**Strategy Consulting**
- McKinsey & Company
Munich is home of over 60 VC, CVC and private equity companies
Selection of investors based in the Munich region
Munich has many unicorns, growth companies and exists

Selection of Munich’s startup success stories

<table>
<thead>
<tr>
<th>Company</th>
<th>Founded Year</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BRAINLAB</strong></td>
<td>1989</td>
<td>Key player in the field of radiation therapy and neurosurgery</td>
</tr>
<tr>
<td><strong>CANCOM</strong></td>
<td>1992</td>
<td>Top 3 IT provider in Germany, specializing in cloud computing, €850 million market capitalization</td>
</tr>
<tr>
<td><strong>CHECK24</strong></td>
<td>1999</td>
<td>Price comparison platform, 500€ mio in revenues, 1000 employees</td>
</tr>
<tr>
<td><strong>eos</strong></td>
<td>1989</td>
<td>Global technology and quality leader for high-end solutions in the field of additive manufacturing</td>
</tr>
<tr>
<td><strong>FLiXBUS</strong></td>
<td>2011</td>
<td>75% market share in long-distance coach market in Germany, investors include General Atlantic</td>
</tr>
<tr>
<td><strong>hybris software</strong></td>
<td>1997</td>
<td>World’s leading provider of e-commerce software and multi-channel solutions, sold to SAP in 2013 for €1 billion</td>
</tr>
<tr>
<td><strong>interhypo</strong></td>
<td>1999</td>
<td>Broker of private property loans amounting to €11.2 billion in 2014, IPO in 2005, take-over by ING Direct in 2011</td>
</tr>
<tr>
<td><strong>metaio</strong></td>
<td>2003</td>
<td>Augmented reality specialists with solutions for industrial, advertising and medial use, exit in 2015 to Apple.</td>
</tr>
<tr>
<td><strong>morphosys</strong></td>
<td>1992</td>
<td>Global market leader in the development &amp; research of human antibodies, IPO in 1999, €1.5 bil. market cap (4/17)</td>
</tr>
<tr>
<td><strong>PAYBACK</strong></td>
<td>2000</td>
<td>20 million bonus program users in Germany, sold to American Express in 2011 for €500 million</td>
</tr>
<tr>
<td><strong>SCOUT 24</strong></td>
<td>1998</td>
<td>Online brokerage platforms, over 8 million users, Deutsche Telekom sold 70% of the shares for €2 bil.</td>
</tr>
<tr>
<td><strong>vexeljet</strong></td>
<td>1999</td>
<td>Specialist for fast and powerful 3D printing systems, IPO in 2013 on the New York Stock Exchange</td>
</tr>
<tr>
<td><strong>WESTWING</strong></td>
<td>2011</td>
<td>Interior design platform, 1500 employees in 14 countries, raised $ 237 mio,</td>
</tr>
<tr>
<td><strong>wirecard</strong></td>
<td>1999</td>
<td>Specialist in international payment processing and issuing, IPO in 2000, €6.6 bil. market cap (4/17)</td>
</tr>
<tr>
<td><strong>windeln.de</strong></td>
<td>2010</td>
<td>Leading online shop for baby and toddler products in Europe, IPO in 2015, €85 mio market cap (4/17)</td>
</tr>
<tr>
<td><strong>zooplus</strong></td>
<td>1999</td>
<td>Online retailer of pet supplies, IPO in 2008, €0.9 bil. market cap (4/17)</td>
</tr>
</tbody>
</table>
Zu Fünf in die Luft

Niklas Zennström, 51, Gründer von Skype, investiert in ein deutsches Start-up. Die Münchner Firma Lilium sammelte Kapital in Höhe von 90 Millionen Dollar bei Investoren ein. Lilium gehört zu einem der chinesische Internetkonzerne Tencen...
Startup success stories at UnternehmerTUM

FOS4X
Fibre-optical monitoring

KONUX
Smart sensor systems for industry

CElonIS
Big data software

PROGLOVE
Electronic glove for industry

FLIXBUS
Europe’s biggest long distance bus operator

DYNAMIC BIOSensors
Molecular measuring

TADO
Smart thermostats

MAGAZINO
Intelligent warehouse logistics

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Molecular measuring

TADO
Smart thermostats

MAGAZINO
Intelligent warehouse logistics
UnternehmerTUM, a leading startup center, has a unique portfolio of offerings

- Center for Innovation & Business Creation at TUM
- Owner: Susanne Klatten
- Founded in 2002
- More than 200 employees
- German Digital Hub Mobility

<table>
<thead>
<tr>
<th>Education</th>
<th>(Pre-)Incubation</th>
<th>Startup development</th>
<th>Consultancy</th>
<th>Startup financing</th>
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</thead>
<tbody>
<tr>
<td>~2,000 students / year</td>
<td>&gt;100 startup and tech projects / year</td>
<td>&gt;50 scalable startups / year</td>
<td>~100 corporate / industry partners</td>
<td>1000 startups in dealflow / year</td>
</tr>
</tbody>
</table>
UnternehmerTUM is an open platform for building tech businesses together.
On the university campus Garching, all startup activities are bundled under one roof.
UnternehmerTUM is expanding its locations in Munich

**MUNICH URBAN COLAB**
Starting 2020:
Munich Urban CoLab
of the City of Munich and
UnternehmerTUM

**RUFINI-BUILDING**
Starting October 2017:
Pop-up Space in the Heart of Munich

**ENTREPRENEURSHIP CENTER**
Research Campus Garching

**25th FLOOR AT IBM WATSON**
Highlight Towers Munich
UnternehmerTUM has a strong global partner network
With its entrepreneurial mindset UnternehmerTUM is growing for over 15 years.
ZWÖLF REGIONALE STÄRKEN

- HAMBURG: Logistics
- BERLIN: IoT & FinTech
- DORTMUND: Logistics
- POTSDAM: MediaTech
- KÖLN: InsurTech
- DRESDEN/LEIPZIG: Smart Systems & Smart Infrastructure
- FRANKFURT/DARMSTADT: FinTech & Cybersecurity
- NÜRNBERG/ERLANGEN: Digital Health
- MANNHEIM/LUDWIGSHAFEN: Digital Chemistry & Digital Health
- KARLSRUHE: Artificial Intelligence
- STUTTGART: Future Industries
- MÜNCHEN: Mobility & InsurTech
MakerSpace bietet auf 1.500 qm ein breites Spektrum an Software- und Hardware-Tools, Tech-Trainings und eine große Community an Talenten.