

# ScaleUp Dashboard 2017



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## Highlights

- The number of scale-ups in the Netherlands has increased to 3237. This means that the number of scale-ups increased by 5.4% in the past year compared to the previous year.
- The number of startups becoming scale-ups rises tremendously. Over the past two years, this has increased by no less than 220%. One in ten scale-ups in the Netherlands arise from a startup.
- Top sectors count relatively many scale-ups. The top sectors Energy, High-tech and Life Sciences & Health are the frontrunners.
- An increasing number of companies in the Netherlands are hardly, if at all, growing. Almost a third of Dutch companies are even shrinking.

# ScaleUp Dashboard 2017

## Highlights in statistics

**3237**

Scale-ups  
in 2016

**5.1%**

Of Dutch companies can be  
classified as scale-up

**5.4%**

Growth in number of scale-ups  
compared to 2015

**38.844**

New jobs created by scale-ups  
from 2013-2016

**331**

Startups have grown  
into scale-ups

# ScaleUp Dashboard 2017

## Introduction

The ScaleUp Dashboard is an annual research of fast-growing companies, or scale-ups, in the Netherlands.

The dashboard provides insight into the number of scale-ups in the Netherlands, in which sectors and regions most of these companies are located, the contribution of scale-ups to the Dutch economy.

The ScaleUp Dashboard is an initiative of Rotterdam School of Management (RSM) and the Erasmus Center for Entrepreneurship (ECE) and is led by Prof. Dr. Justin Jansen.



# ScaleUp Dashboard 2017

## Definition scale-up

A company is a fast-growing company or scale-up when it generates annual growth in turnover and / or full-time employees of 20% during a three-year period.

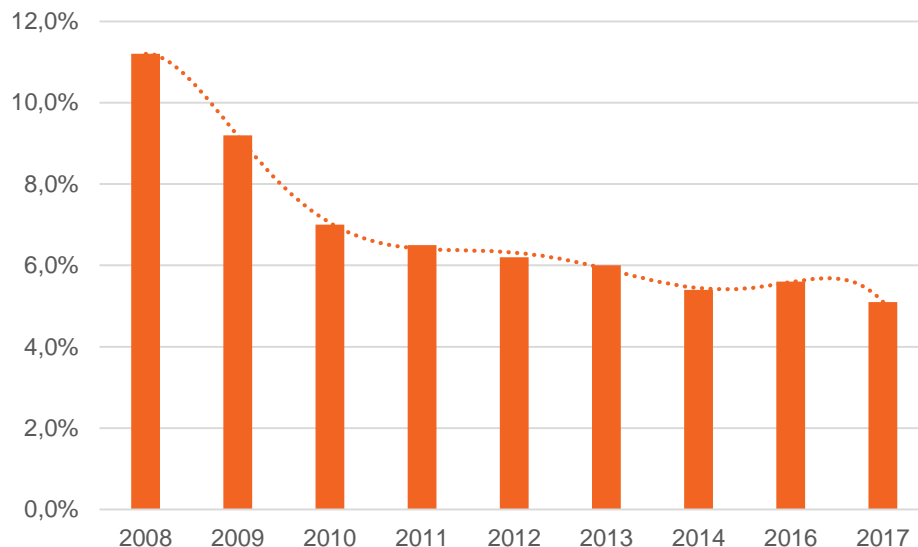
The company must have at least 10 employees or a turnover of at least 5 million euros at the beginning of the three-year period.

# 20%

## Annual growth over 3 years

# Scale-ups over the years

## Slight decrease in the share of scale-ups in the Netherlands



The number of scale-ups has risen to 3237 in the past year; an increase of 5.4%.

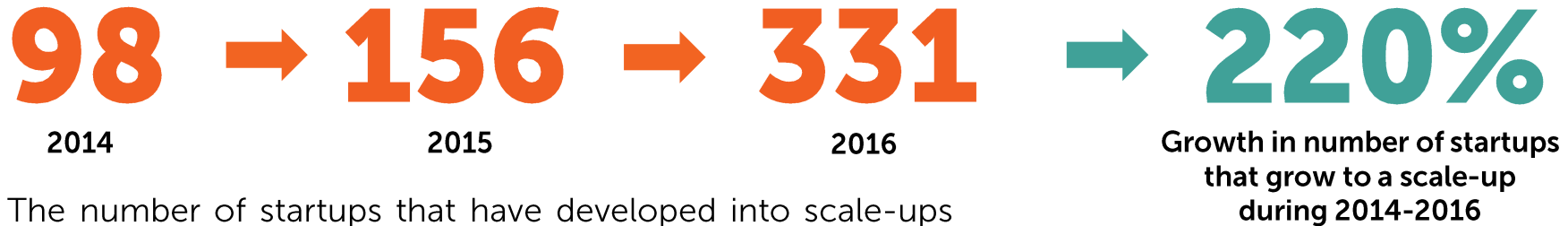
During the same period, the number of companies in the Netherlands increased significantly, as a result of which the relative number of fast-growing companies fell slightly to 5.1%.

# From startup to scale-up

How many startups become scale-ups?

# From startup to scale-up

Explosive growth in the number of startups that become scale-ups



The number of startups that have developed into scale-ups increased by no less than 220 percent in recent years.

Almost 1 in 10 scale-ups are now emerging from a startup. Particularly in the wholesale and retail trade, technical consultancy, health care and information and communication technology.

A startup in this study is defined as a company that was founded less than 5 years ago.

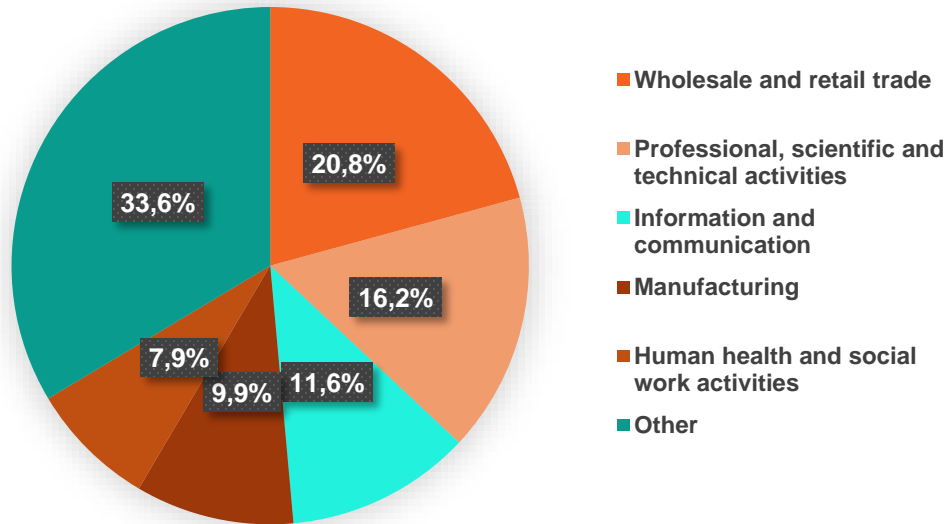


# Scale-ups in sectors

In which sectors are most scale-ups operating?

# Scale-ups within different sectors

Wholesale and retail has the largest group of scale-ups

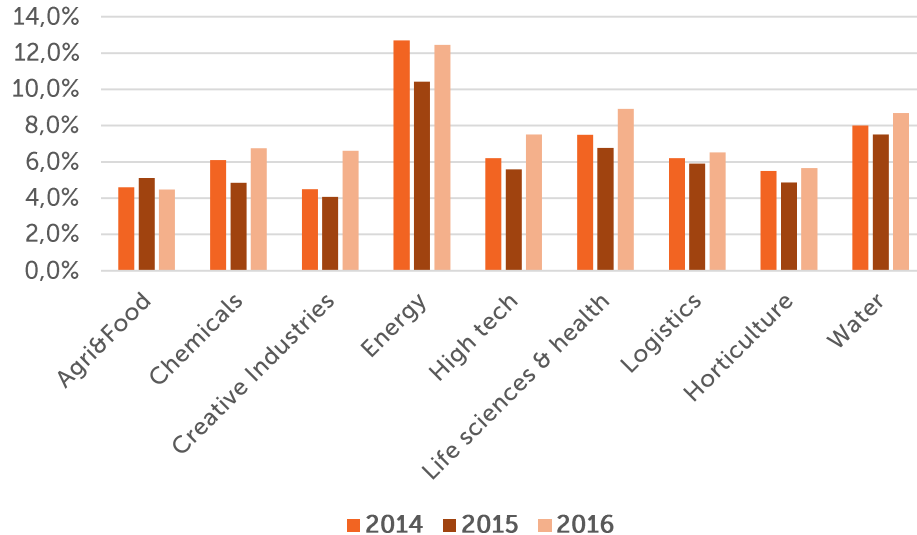


Most scale-ups are located in the wholesale and retail trade, consultancy, research and technical activities, and information and communication technology.

Within the 'other' sectors, hotels and restaurants (6.4%), transport (5.8%) and business services (5.7%) are the sectors with most scale-ups.

# Scale-ups in top sectors

## Share of scale-ups in top sectors



Top sectors have a relatively bigger share of scale-ups.

Especially in the top sectors Energy, High-tech systems and materials, and Life Sciences & Health, relatively many scale-ups have emerged over the past period.

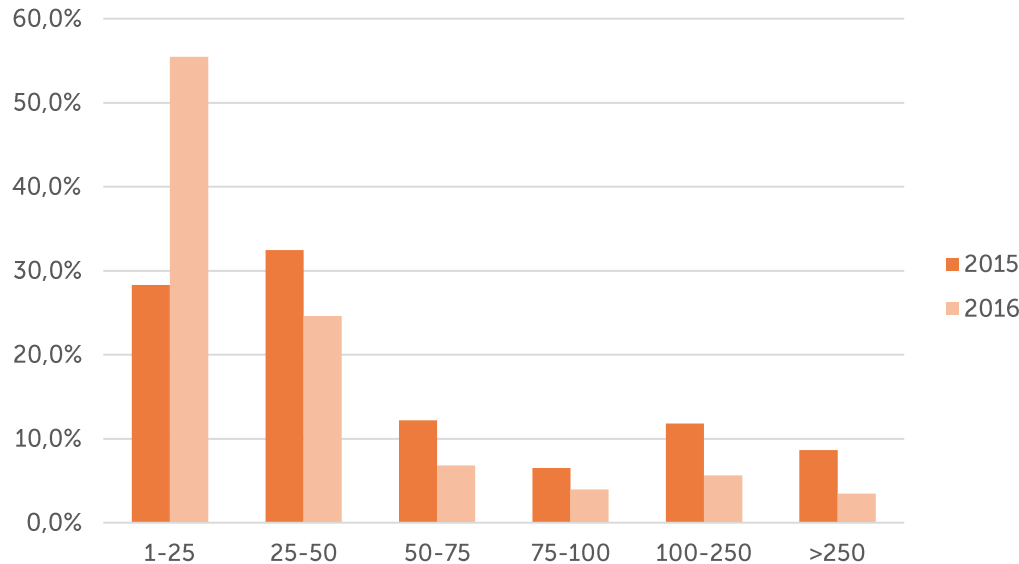
Cooperation is important for stimulating rapid growth in relatively young companies.

# Size of scale-ups

How big are scale-ups in the Netherlands?

# Size of scale-ups

## Increasing amount of scale-ups with 50 employees or less



An increasing proportion of scale-ups in the Netherlands are formed by relatively smaller and younger companies.

In 2015, 60.8% of scale-ups in the Netherlands had 50 employees or less, compared to 80.1% last year.

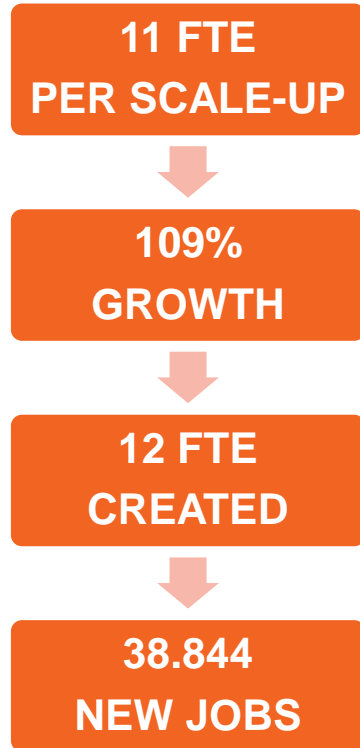
Companies are able to achieve rapid growth at an accelerated pace.

# Job creation by scale-ups

How do scale-ups influence employment?

# Job creation by scale-ups

Scale-ups are the job engine of the Netherlands



Scale-ups in the Netherlands have, on average, grown 109% in the number of full-time employees.

During this three-year period, the scale-ups in the Netherlands have been responsible for the creation of 38,844 new full-time jobs.

The number of newly created jobs has decreased due to a shift to smaller scale-ups.

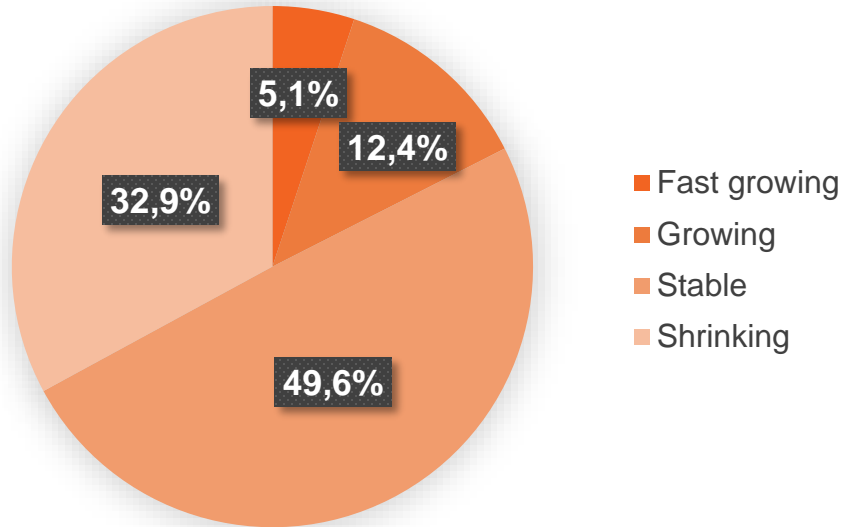
# Growth at Dutch companies

How many Dutch companies grow, are stable or shrink?



# Growth at Dutch Companies

Almost 85% of Dutch companies do not grow or hardly grow



Almost 85% of Dutch companies do not grow or hardly grow (less than 5% growth over the past three years).

Growth in Dutch companies is generated by a relatively small group of growing (5-20% growth) and fast-growing (more than 20% growth) companies.

Almost a third of Dutch companies show a shrinkage.

# Growth Ambition

What should we do to improve the Dutch scale-up environment?

# Growth objectives

## Smart growth policy and support for front runners and laggards

- Differences between front runners and laggards require specific support and measures.
- Where scale-ups specifically need knowledge and experience in the field of scalability and talent management, the group of stable / shrinking companies should be supported specifically in identifying new growth opportunities and attracting growth capital.
- Practical assessment tools and techniques should be developed and made available for SMEs. Not only for scale-ups, but also for the stable / shrinking companies to identify and implement new growth opportunities.
- Growth tools for SMEs; very practical and attractive, yet strategic and focused on long-term growth opportunities

# Interested in scale-up data?

Access specific insights through the ScaleUp Dashboard Database

For more information, visit [www.scaleupdashboard.com](http://www.scaleupdashboard.com)

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## Author

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Based on the impact of his research, Professor Jansen has recently been named one of the most influential scientists by Clarivate Analytics, the former Thomson Reuters. The ideas and outcomes of Jansen's research have influenced the future of management research in important new approach. Professor Jansen has also been named one of the top 100 leading professors in the field of entrepreneurship worldwide.





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