

2022 Scale-Up Confidence Survey

March 2022 – Report



Five key insights from our 2022 Scale-Up Confidence Survey



2022 Confidence Score → 8.4/10

2020 → 6.9/10

2021 → 7.9/10

Confidence Survey March 2022



Finding the right talent is now the biggest challenge amongst scale-ups with **50% of companies highlighting talent as their biggest challenge** to reach their growth ambition, **up 22%** from last year and surpassing delayed/lower customer signings



Survey respondents increased their headcount by **5.494 FTEs in 2021 growing 47%**, with a median expected and realised FTE growth of 5. Respondents are set to grow their headcount by another **6.712 FTEs in 2022, growing 39%**, while doubling their median expected FTE growth to 10



FinTech scale-ups achieved the highest revenue growth in 2021 (171%)*, whilst **Electronic devices, hardware & semiconductor scale-ups expect the highest growth in 2022 (187%)***



56% of scale-ups achieved their expected revenue growth in 2021, up 21% vs 2020 with life sciences & healthcare having the largest percentage (**67%**) of scale-ups achieving their expected growth



New customer acquisition remains the primary area of focus for scale-ups to realise their growth aspirations in 2022 at 80%. Partnerships & Resellers declined by 8% which is surprising considering that it is an essential driver for international scaling and the challenges for scale-ups to attract talent

Table of contents



Survey participants



Looking back



Growth



Funding & liquidity management



Talent & organization



Technology scalability & security



Digital operations



Confidence



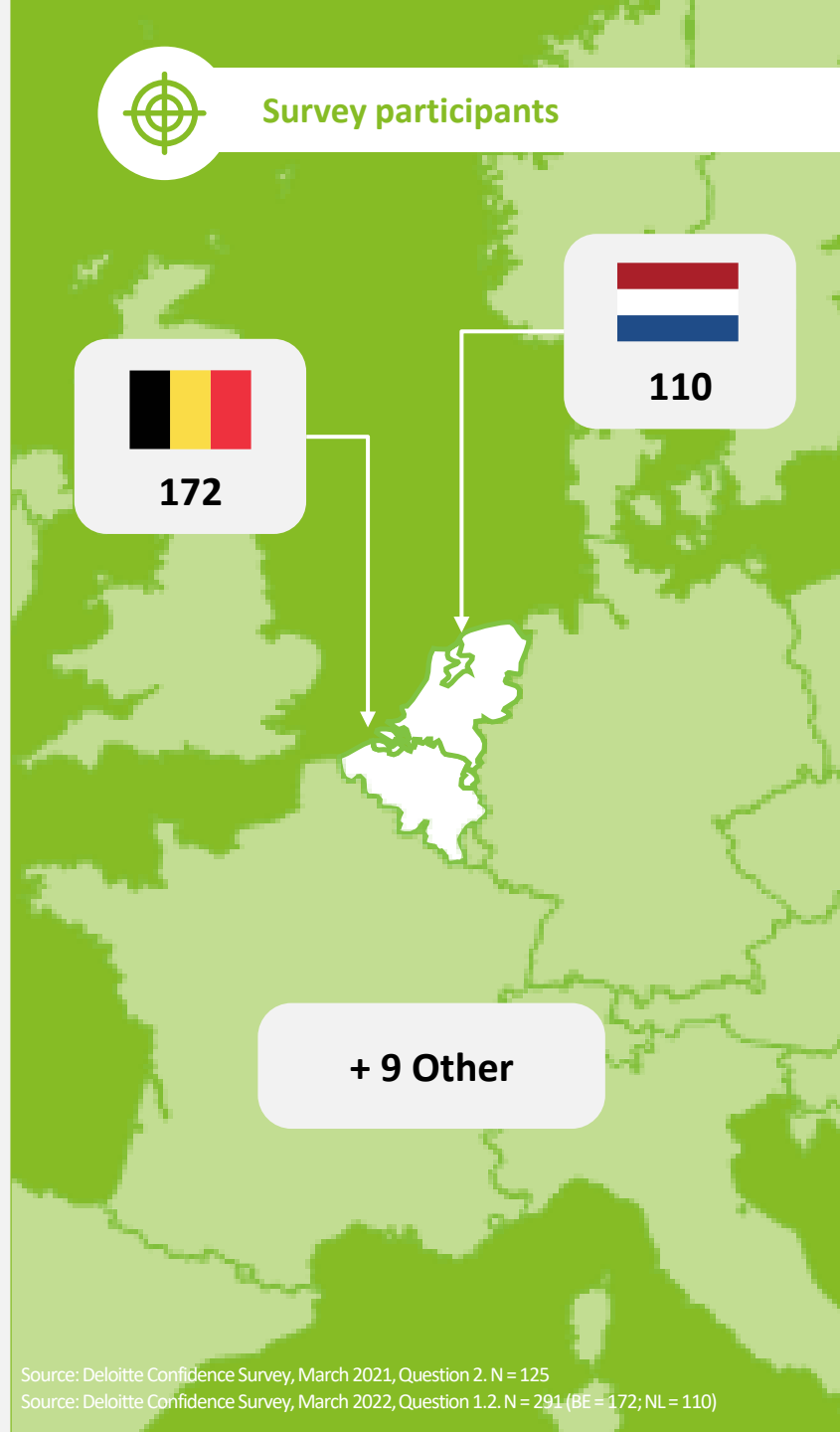
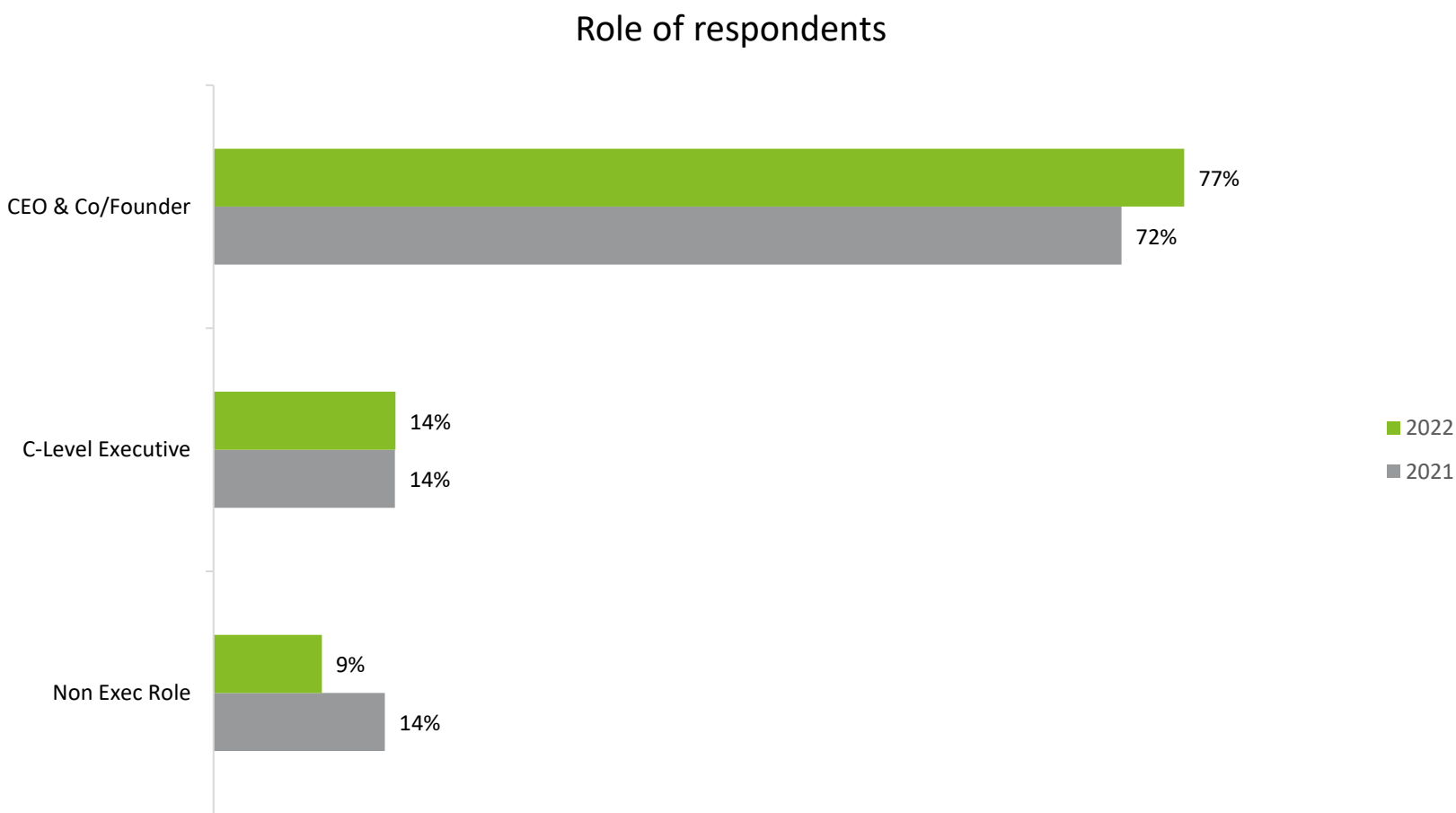
Detailed segments analysis



Survey participants

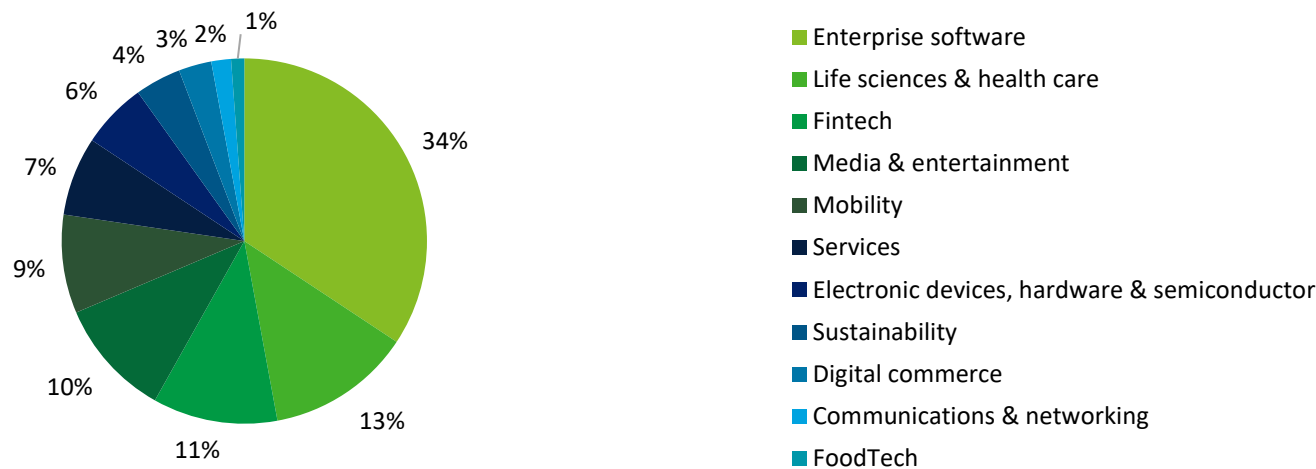


291 scale-ups responded to the 2022 Scale-Up Confidence Survey, with 172 from Belgium and 110 from the Netherlands, up from 125 respondents in 2021

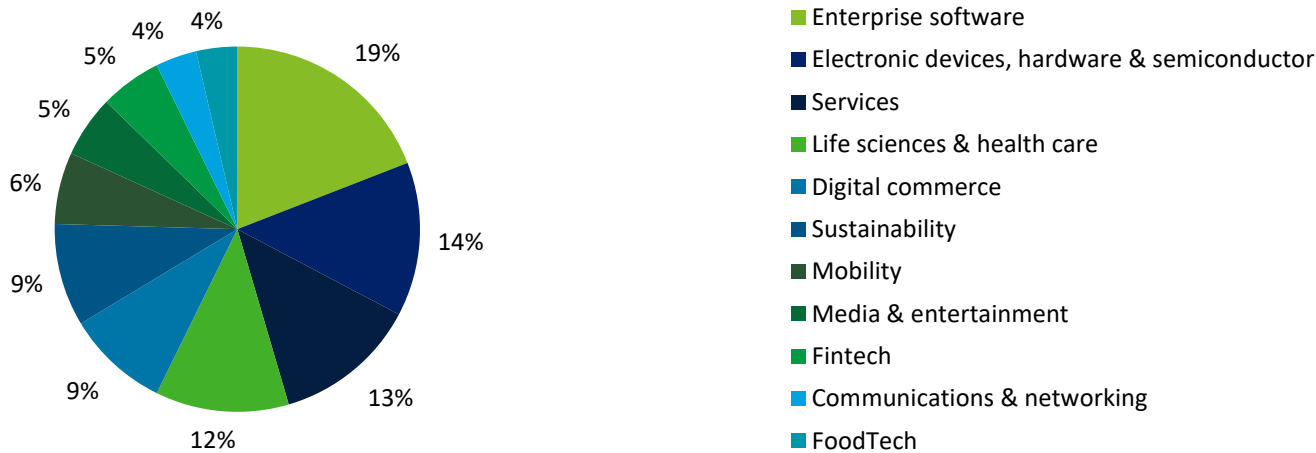


Enterprise software is the most represented segment in Belgium (34%) and in the Netherlands (19%), followed by Life sciences & healthcare

Belgium



Netherlands

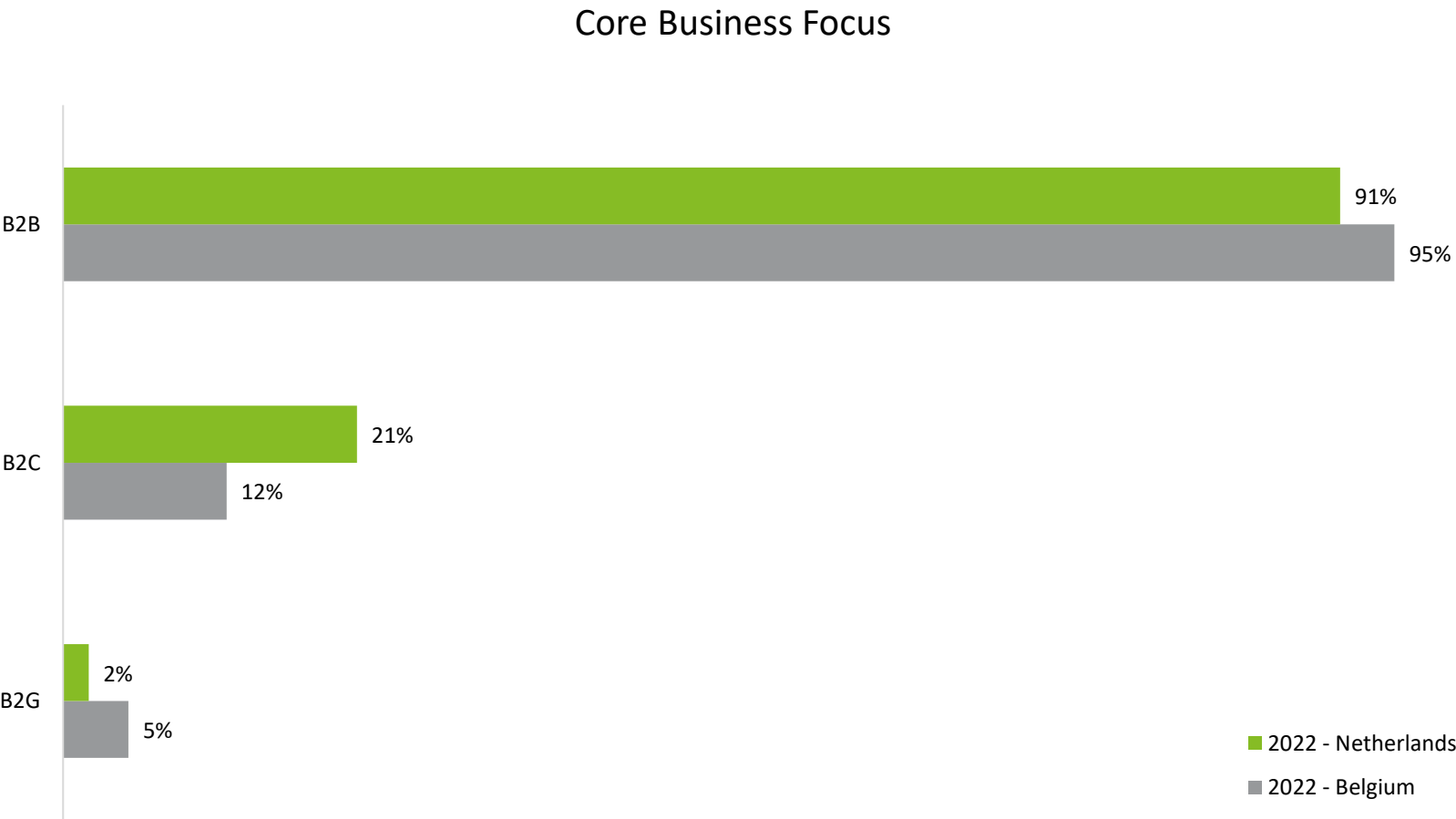


Survey participants

Over one third of scale-ups who participated in Belgium are Enterprise software companies.

In the Netherlands, the lead is shared between Enterprise software, Digital commerce and Electronic devices, hardware and semi-conductor scale-ups.

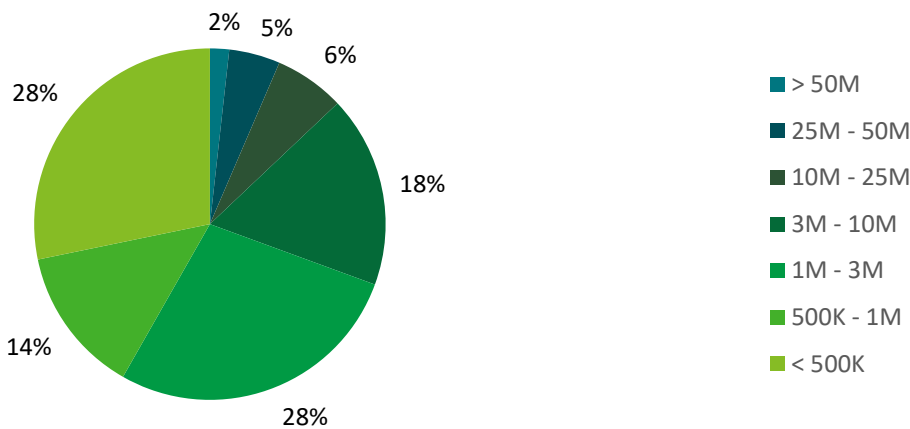
When asked about their business focus, +90% of the respondents answered that they operate in a B2B context



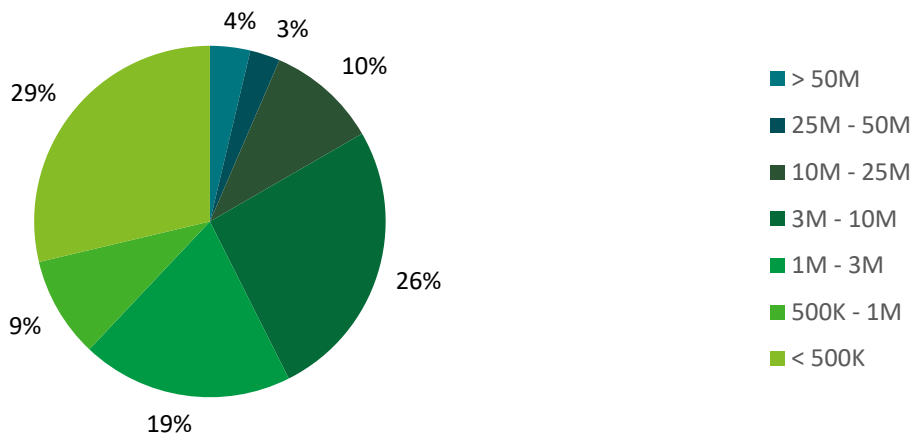
Respondents show a big spread in revenue levels, with the vast majority having a revenue of less than 25 million euro

Percentage of respondents per revenue band (in €)

Belgium



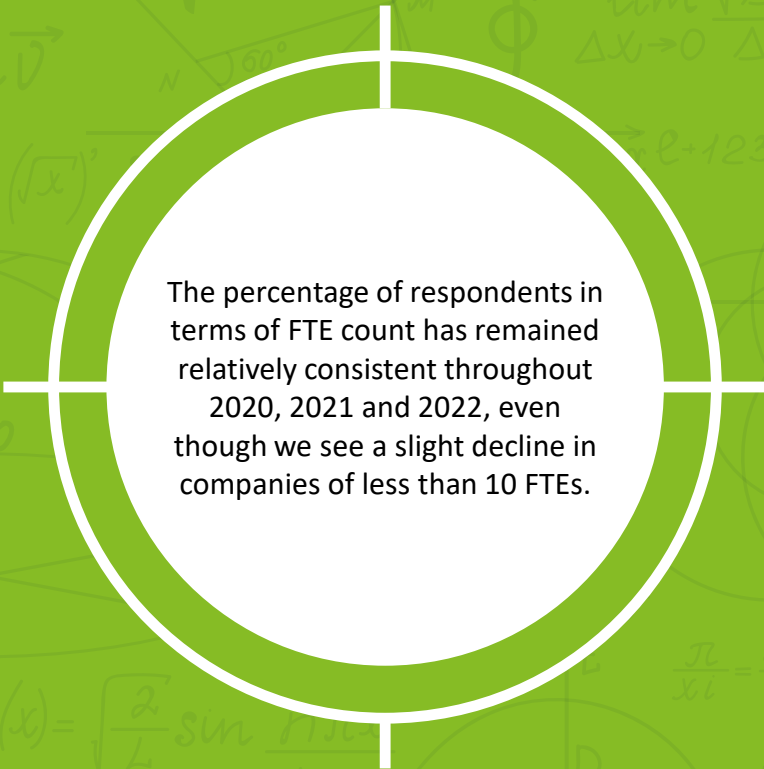
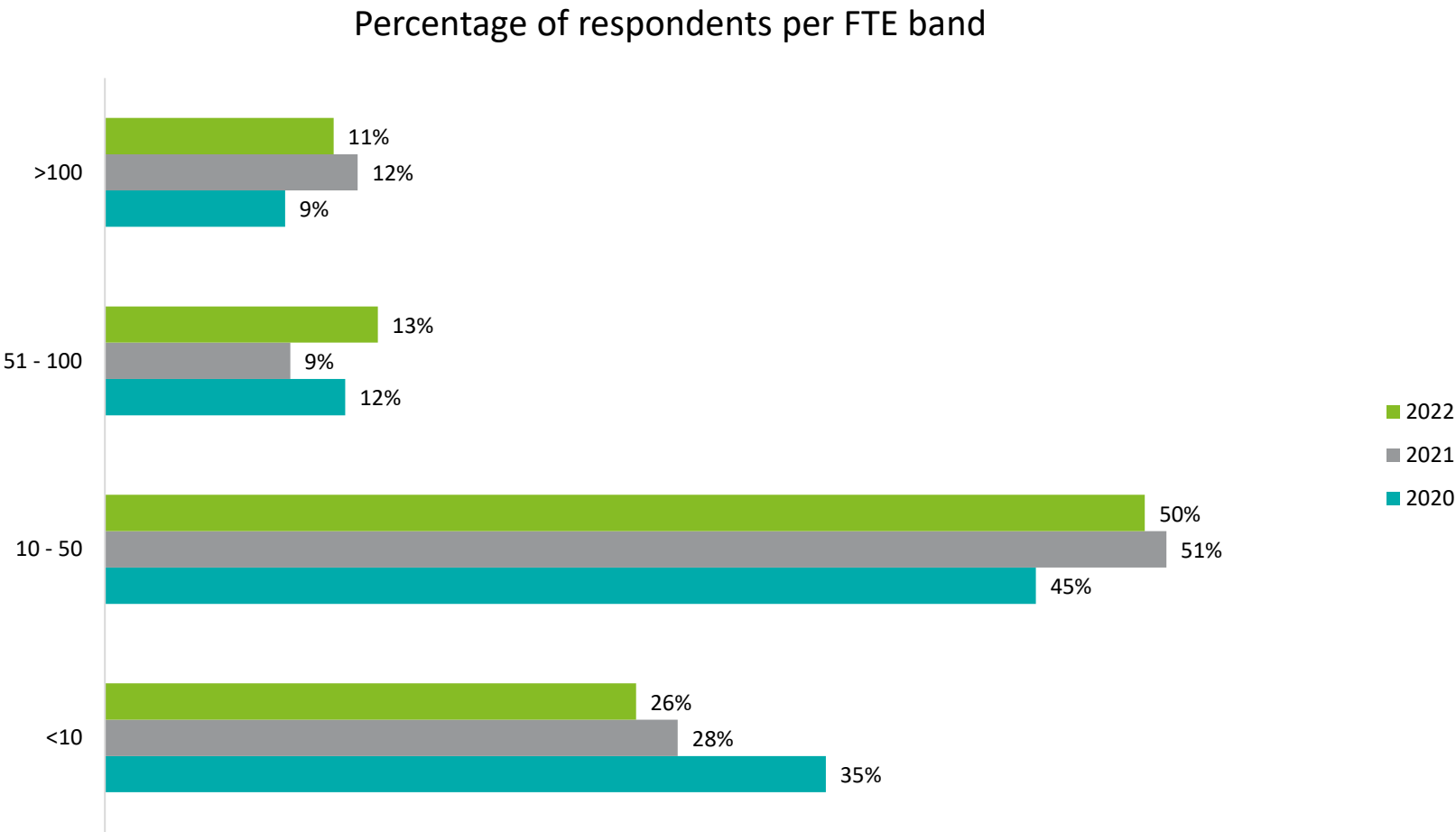
The Netherlands



Survey participants

In the Netherlands, we see a greater response from medium to large scale-ups with a revenue of more than 3 million euro representing 40% of their respondents compared with 26% of scale-ups of this size in Belgium.

Of the 291 respondents, we see a slight decline in the percentage of scale-ups with <10 FTEs

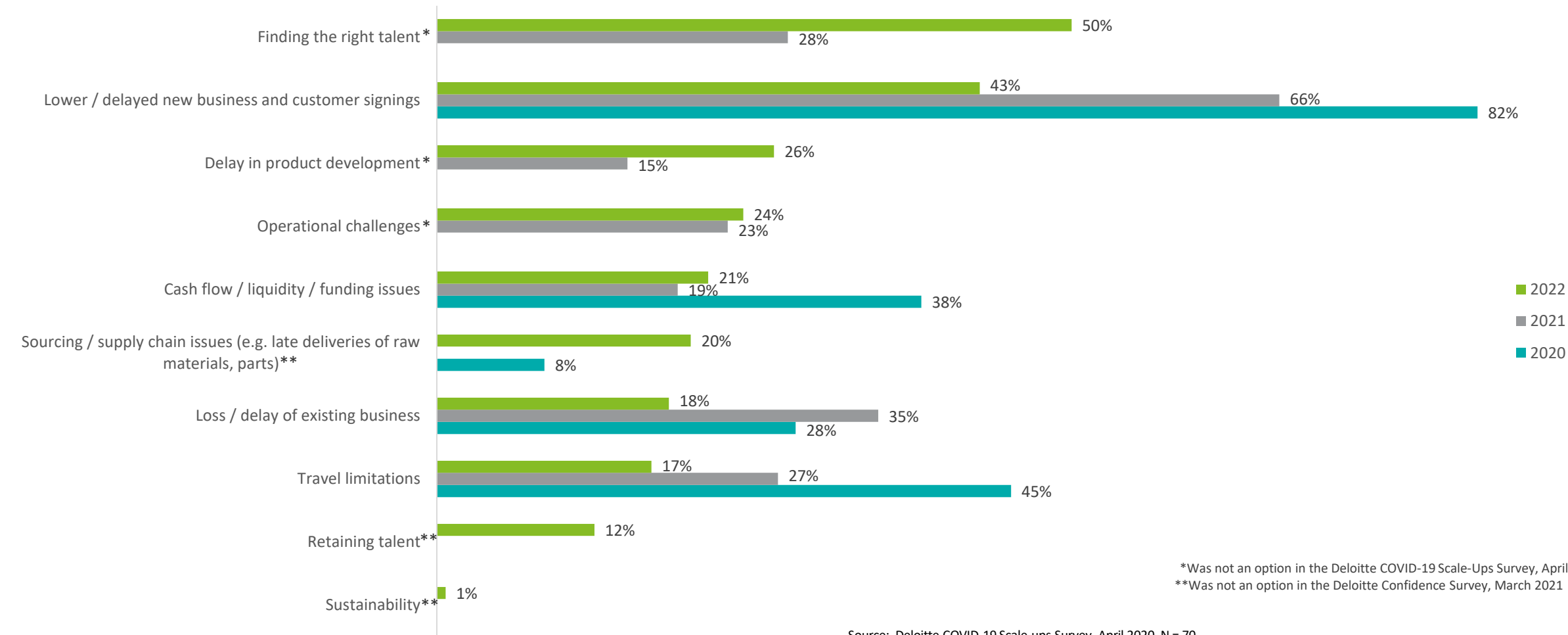


Looking back



Finding the right talent became the biggest challenge for scale-ups in our 2022 survey growing 22% from 2021, closely followed by lower/delayed new business and customer signings

Q: Looking back, what were the biggest challenges to reach your growth ambition?



Finding the right talent became the biggest challenge for scale-ups in our 2022 survey rising by 2 places and delay in product development has also risen 4 places



Looking back

Deloitte COVID-19 Scale-ups Survey April 2020		
Position	Challenge	Score
1	Lower/delayed new business and customer signings	82%
2	Travel Limitations	45%
3	Cash flow/ liquidity/ funding issues	38%
4	Loss/delay of existing business	28%
5	Sourcing/supply chain issues	8%

Deloitte Confidence Survey March 2021		
Position	Challenge	Score
1 -	Lower/delayed new business and customer signings	66%
2 ▲2	Loss/delay of existing business	35%
3	Finding the right talent*	28%
4 ▼2	Travel limitations	27%
5	Operational challenges*	23%
6 ▼3	Cash flow/ liquidity/ funding issues	19%
7	Delay in product development*	15%

Deloitte Confidence Survey March 2022		
Position	Challenge	Score
1 ▲2	Finding the right talent	50%
2 ▼1	Lower/delayed new business and customer signings	43%
3 ▲4	Delay in product development	26%
4 ▲1	Operational Challenges	24%
5 ▲1	Cash flow/ liquidity/ funding issues	21%
6	Sourcing/supply chain issues**	20%
7 ▼5	Loss/delay of existing business	18%
8 ▼4	Travel Limitations	17%
9	Retaining Talent**	12%
10	Sustainability**	1%

*Was not an option in the Deloitte COVID-19 Scale-Ups Survey, April 2020

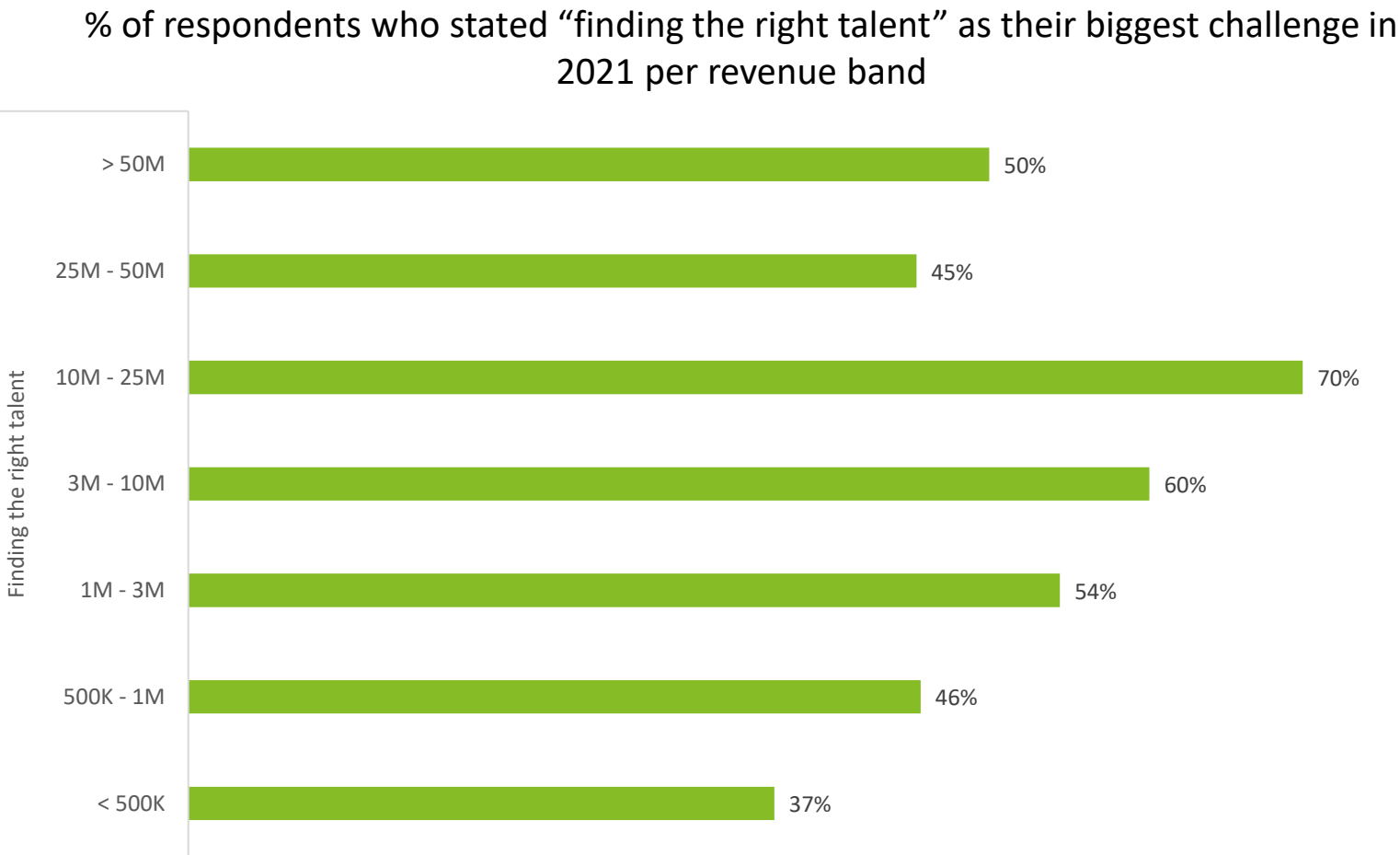
**Was not an option in the Deloitte Confidence Survey, March 2021

Source: Deloitte COVID-19 Scale-ups Survey, April 2020. N = 70

Source: Deloitte Confidence Survey, March 2021, Question 10. N = 125

Source: Deloitte Confidence Survey, March 2022, Question 2.5. N = 291

Finding the right talent as the biggest challenge increases its importance for scale-ups as they grow, with a tipping point at scale-ups with a revenue of +25 million



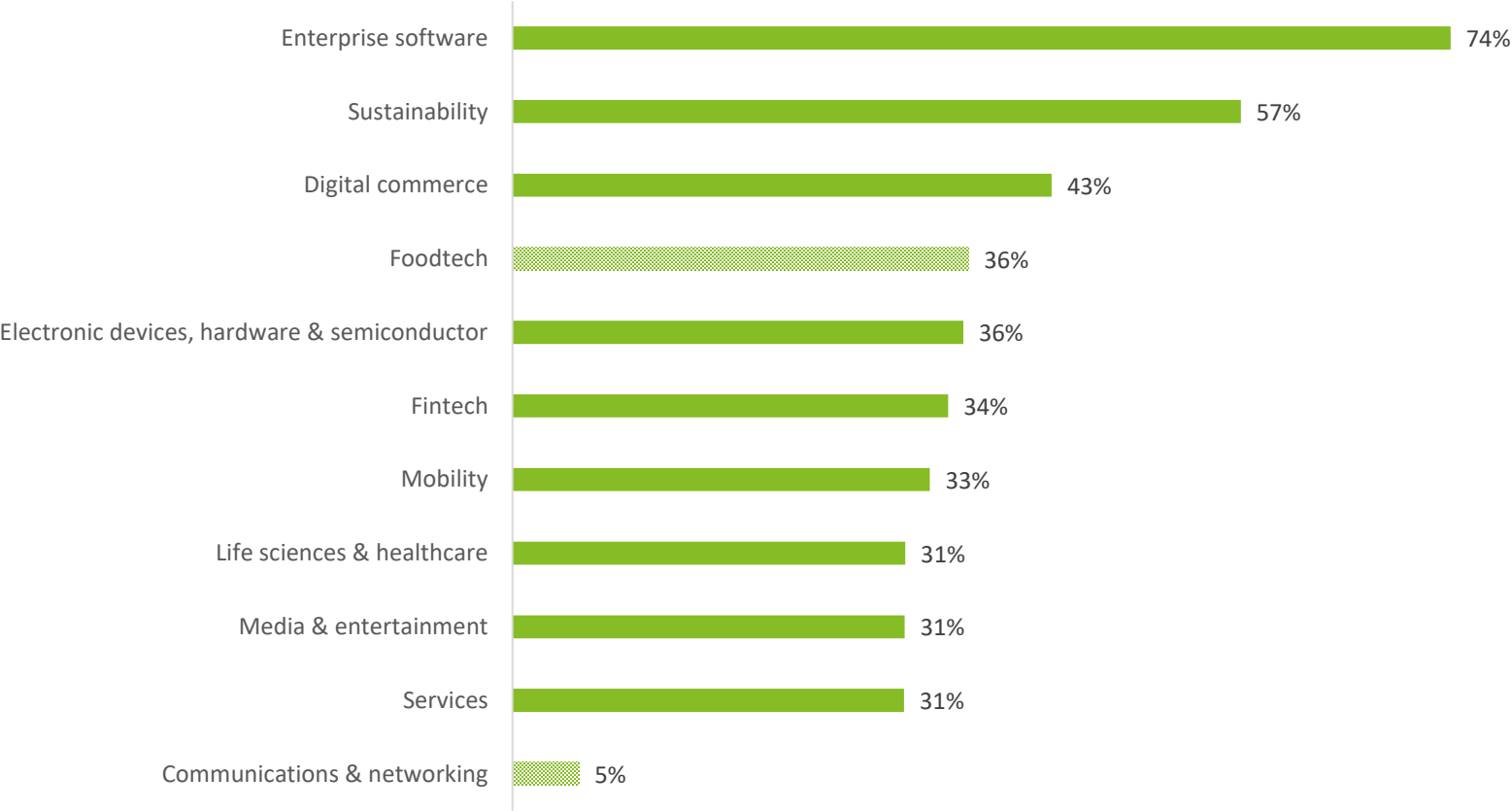
Looking back



Finding the right talent is a growing challenge for scale-ups and as companies mature, it becomes a significant pain point with 70% of respondents between 10-25M stating it as their biggest challenge in 2021.

Enterprise software had the highest FTE growth, increasing headcount by 74% on average

Percentage FTE increase from January 2021 to January 2022



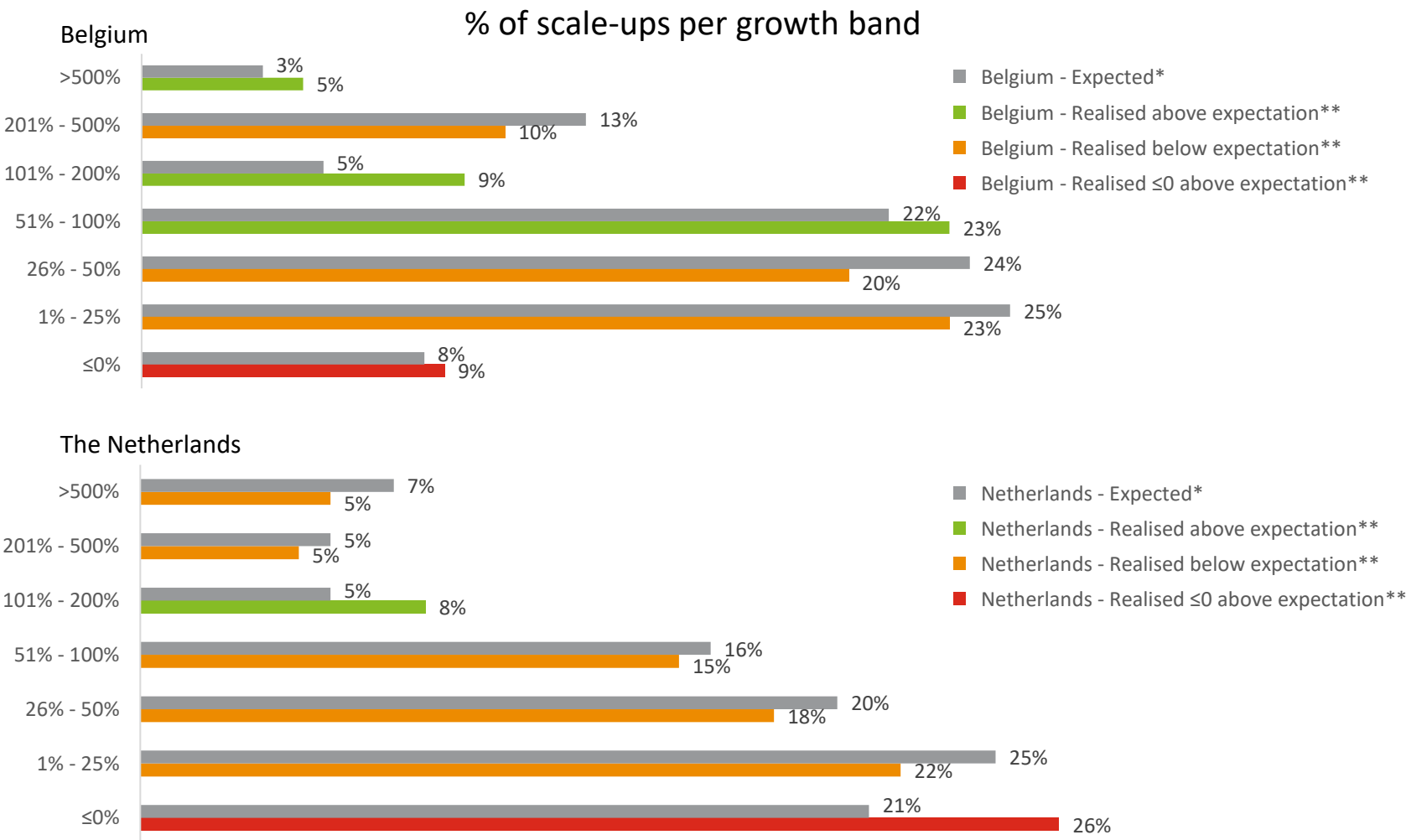
Looking back



8 out of 11 segments increased their FTE count by 30 to 45 percent which shows a steady growth amongst scale-ups.

Sustainability scale-ups had an FTE growth of 57%, which could potentially be linked to the increased importance of environmental regulation such as the EU Green Deal.

26% of Dutch scale-ups reported less than 1% growth in 2021 compared with 9% in Belgium, yet 18% of Dutch scale-ups grew exponentially in 2021 in line with expectations



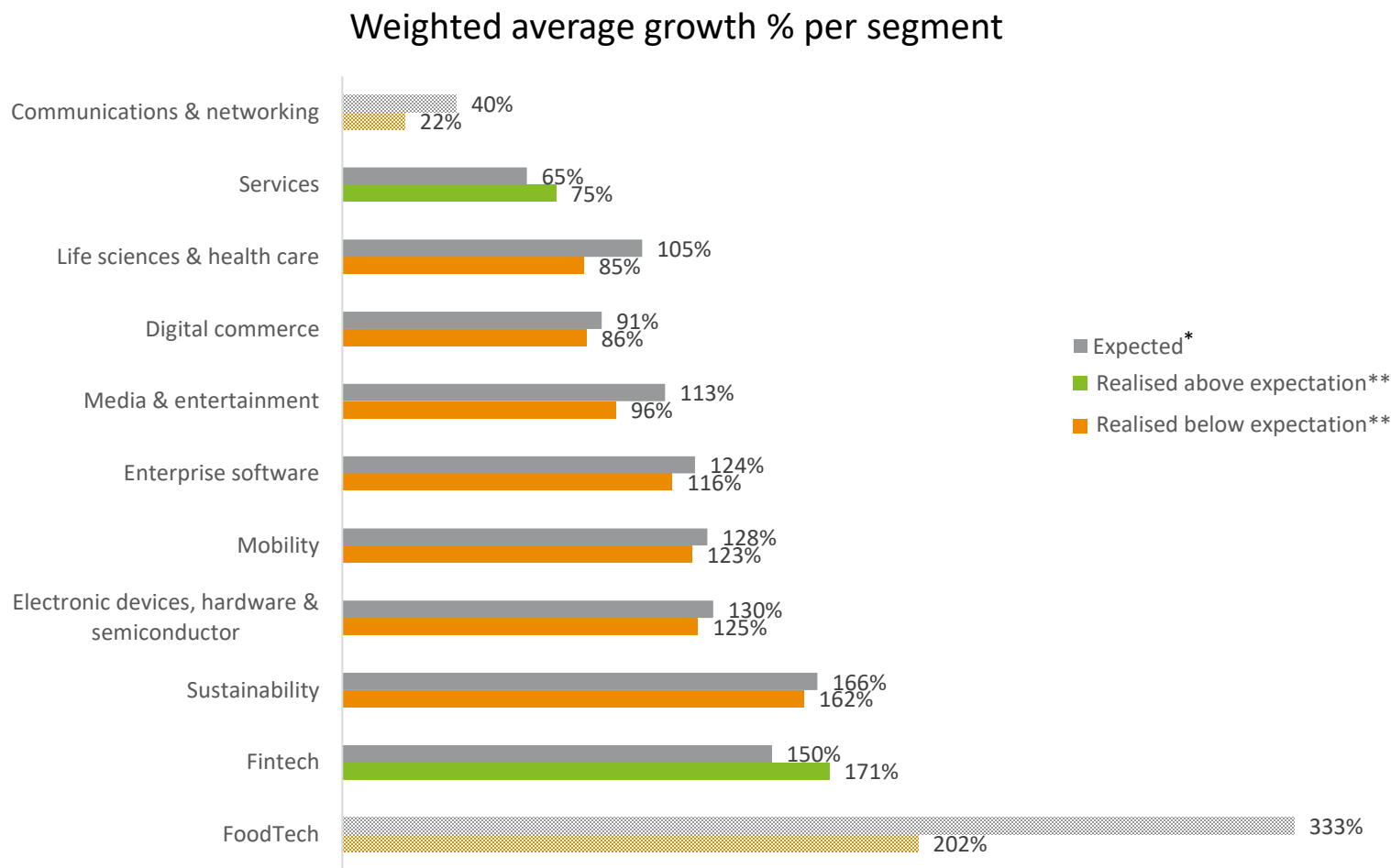
Looking back



Overall, scale-ups are consistent at predicting their growth with the majority of Belgian respondents having predicted (71%) and actually realising (66%) a growth between 1 and 100%.

This is similar for the Netherlands with 61% of respondents expecting and 55% realizing a growth between 1 and 100% in 2021.

We observe significant variances by segment, both in expected and ultimately achieved growth, with FinTech and Sustainability realising the highest weighted average growth in 2021



Looking back



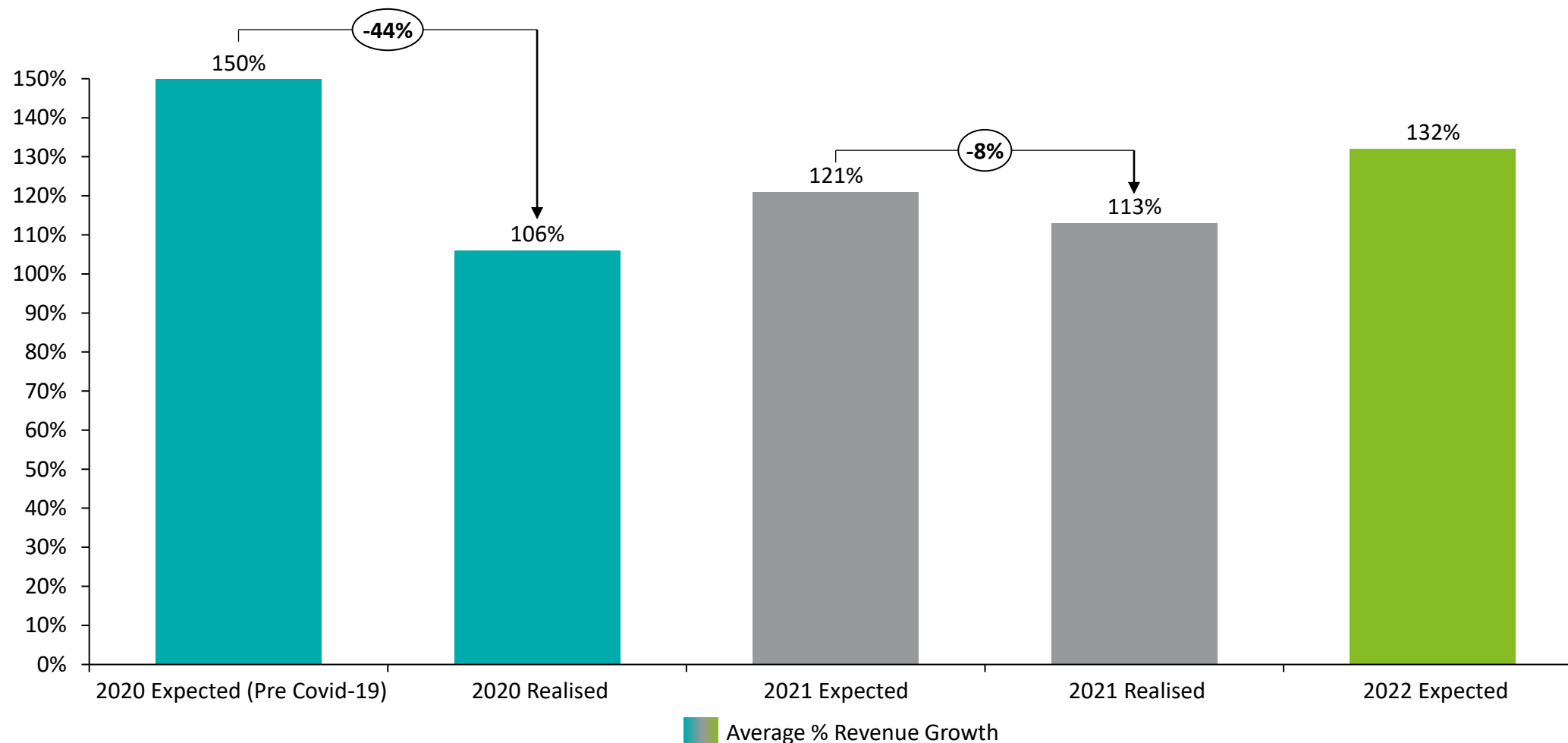
FinTech scale-ups performed exceptionally well realising a weighted average of 171% growth, up 21% on the expected 2021 growth.

Together with FinTech scale-ups, Services scale-ups managed to realise a higher weighted average growth than expected, exceeding it by 10%, in 2021.

Business growth

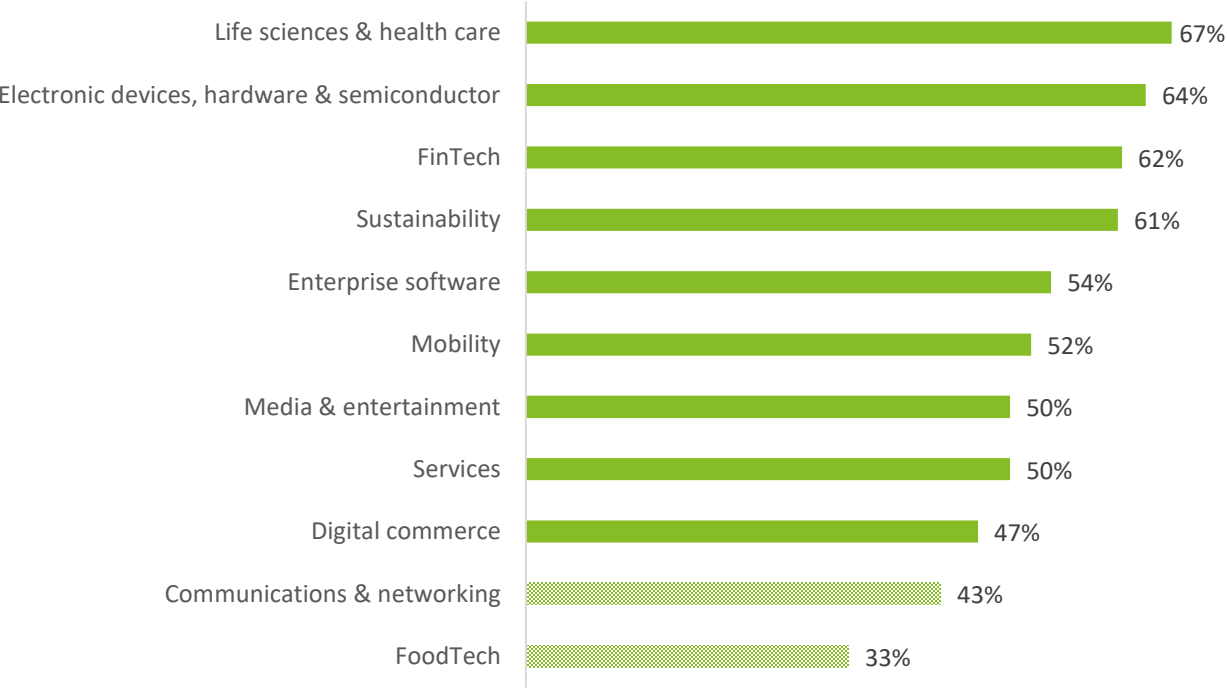


Although scale-ups realised 44% less average revenue growth than predicted in 2020, they grew exponentially and remain ambitious: after having realised an average revenue growth of 106% in 2020 and 113% in 2021, they expect to achieve a growth of 132% in 2022



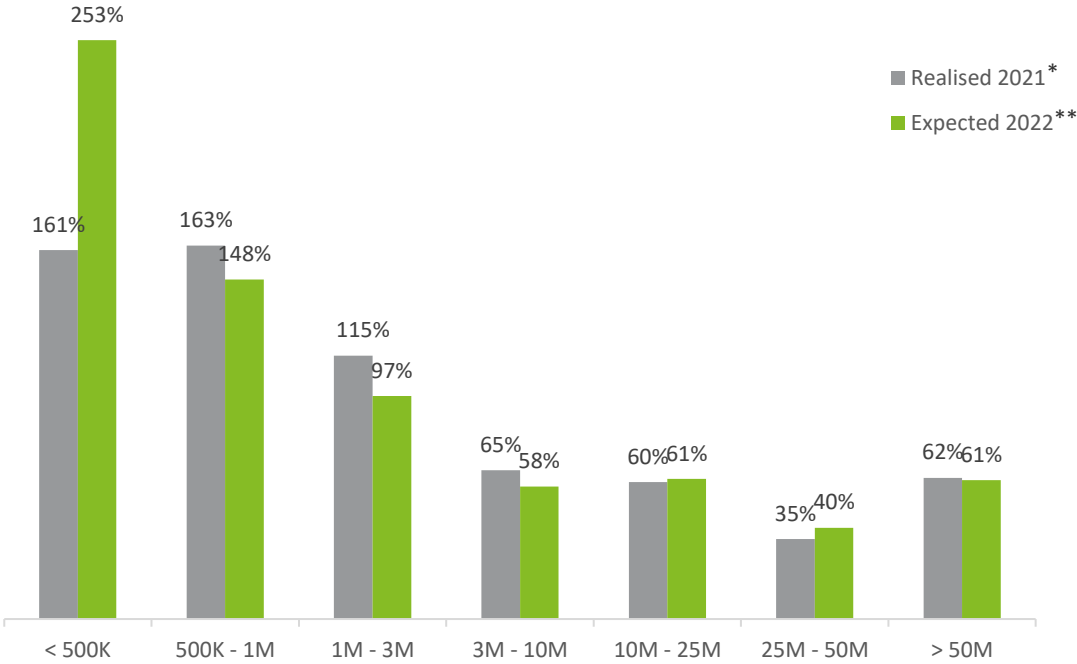
Scale-ups over 3 million in revenue realised an average growth of 56% in 2021, expecting slightly less growth in 2022 at 51%. Scale-ups with a revenue below 1 million realised exponential growth (+160%) in 2021 and expect this trend to continue in 2022

56% of scale-ups realised their expected revenue growth in 2021



% of respondents who realised their growth ambition

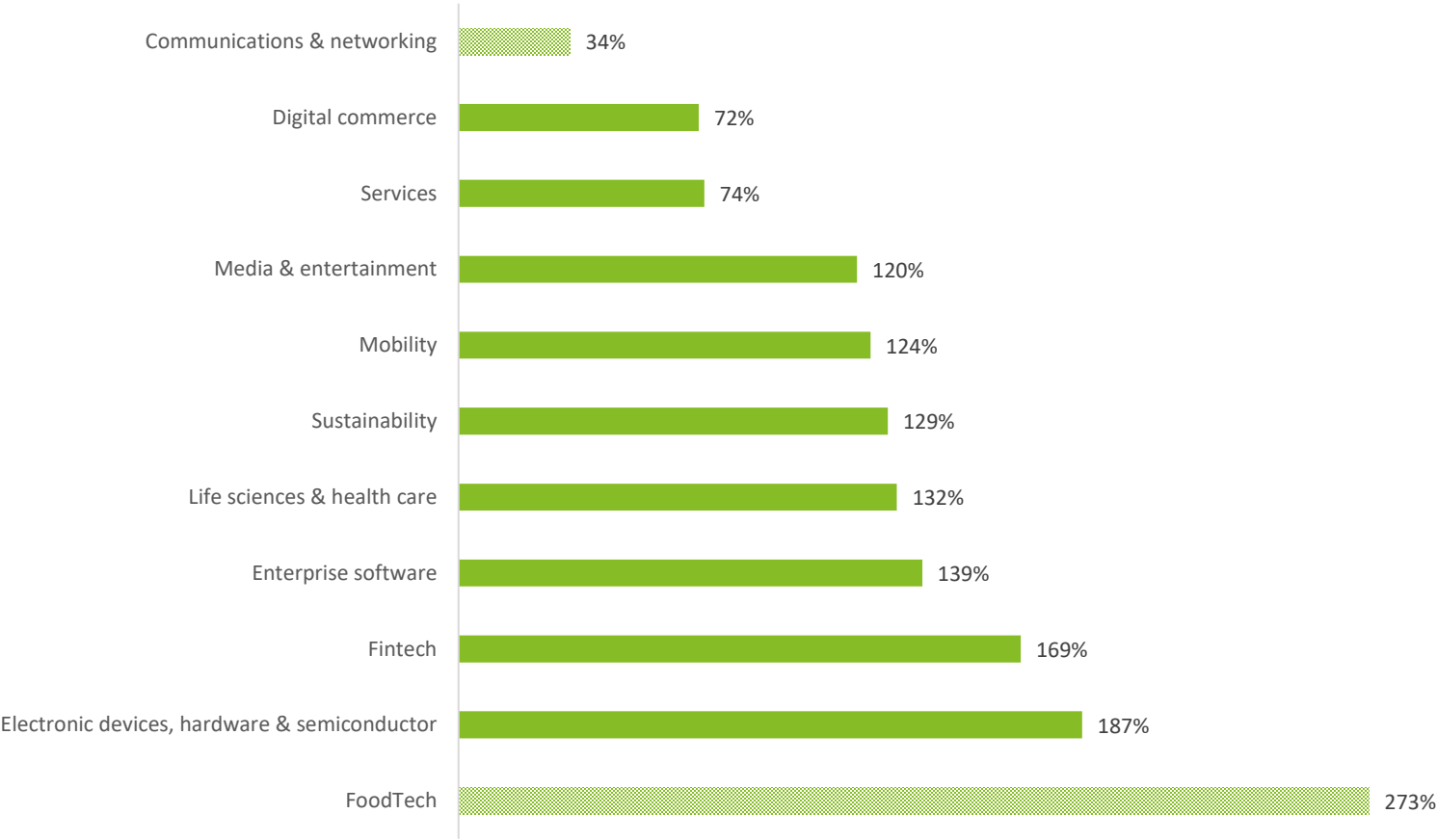
Q: What revenue growth rate do you expect for 2022?



*: Average realised 2021 revenue growth
**: Average expected 2022 revenue growth

Electronic devices, hardware & semiconductor scale-ups expect the highest growth in 2022 with a 187% weighted average growth rate

Weighted average expected revenue growth in 2022 (%)



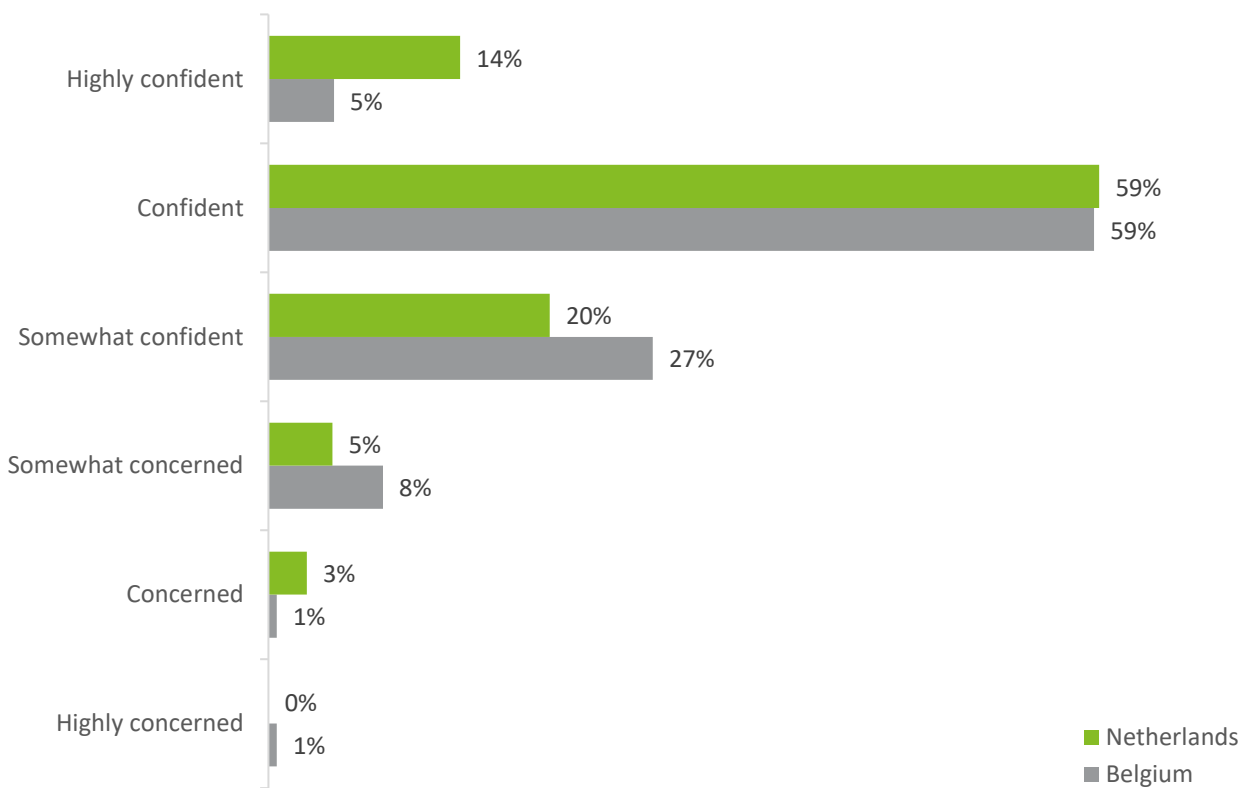
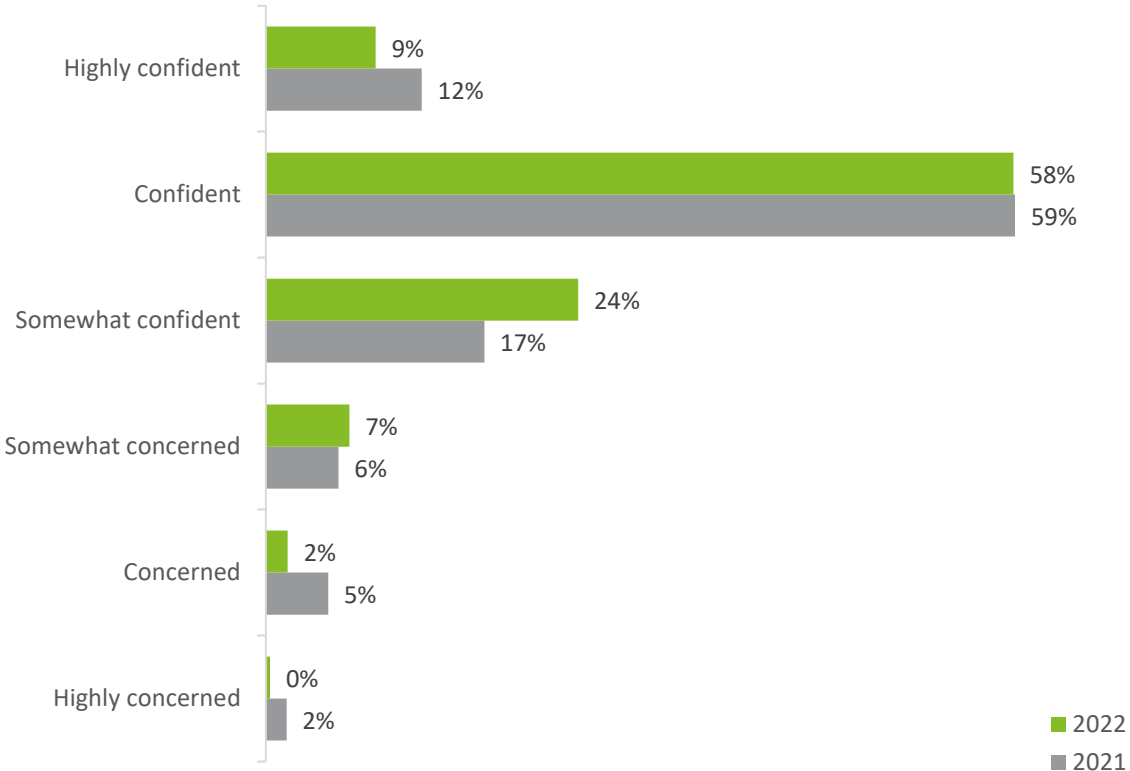
Business growth

Electronic devices, hardware & semiconductors alongside Fintech expect the highest revenue growth in 2022 at +160%.

Considering the current geopolitical events and the creation of a European Chips Act, Electronic devices, hardware & semiconductors can be expected to further grow in the coming years.

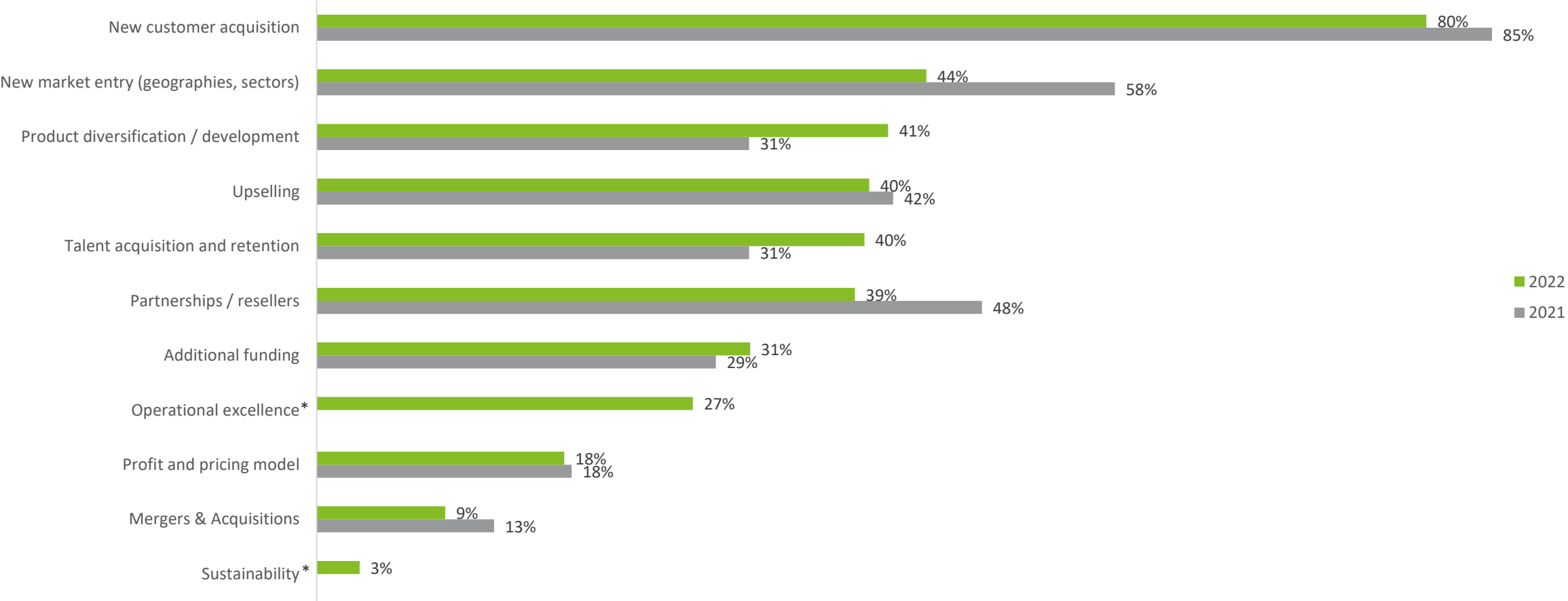
With a strategy and business model that guided them through the Covid-19 pandemic, confidence of scale-ups remains high that it will allow them to achieve their growth target

Q: How confident are you that your current strategy and business model will allow you to achieve your growth target?



New customer acquisition remains the primary area of focus for scale-ups to realise their growth aspirations in 2022. Focus on product diversification and development has increased by 10% showing a need to keep innovating

Q: What will be your primary areas of focus in 2022 to realise your growth aspirations?



Belgian scale-ups flagged the Netherlands, the UK, and other European countries for market expansion whereas Dutch scale-ups have a greater focus on North America and Asia, alongside Belgium and other European countries

Q: To which countries/geographies are you planning to expand your company?



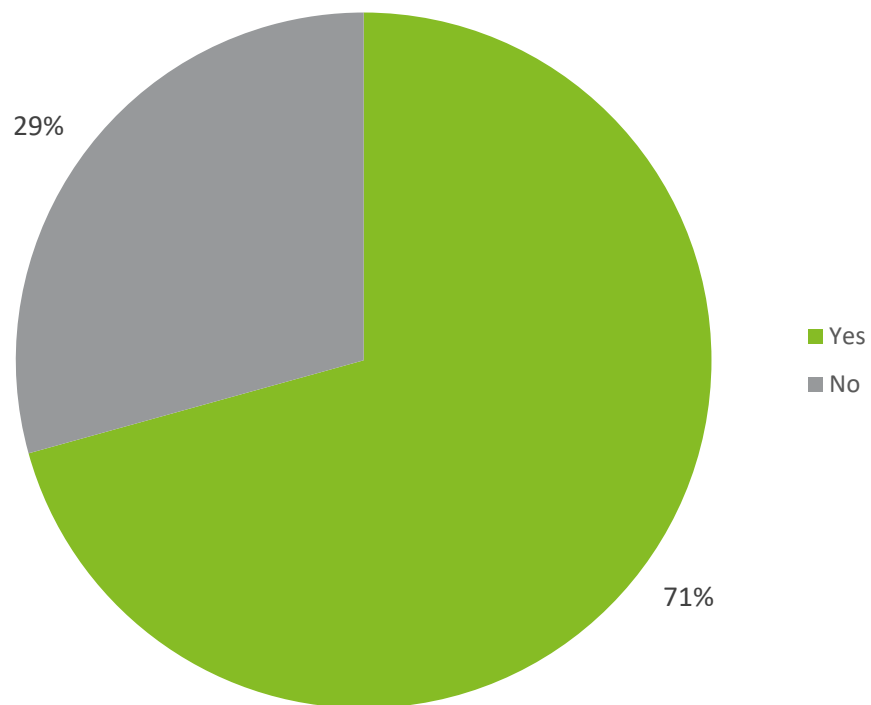
Funding & liquidity management



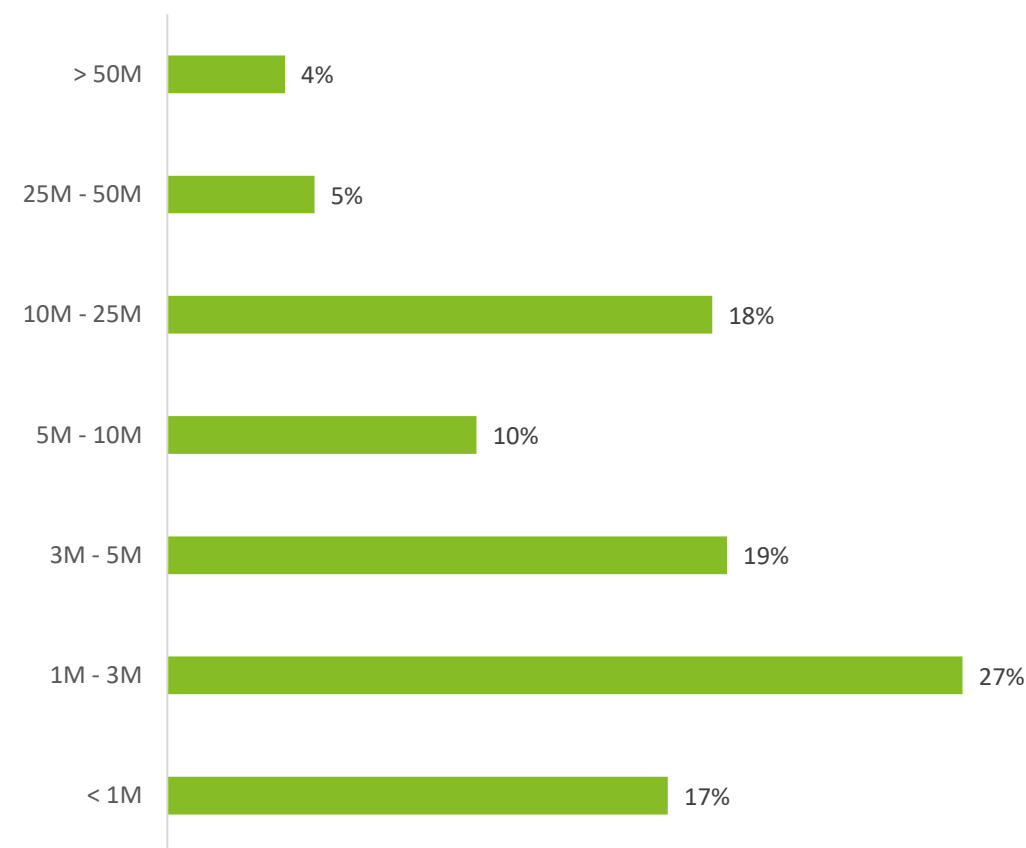
Only 31% of scale-ups indicated finding additional funding as a primary focus area for 2022. However, 71% of respondents are seeking additional funding. 56% of those scale-ups are looking for funding between 1 to 10 million euro



Q: Do you seek additional funding?

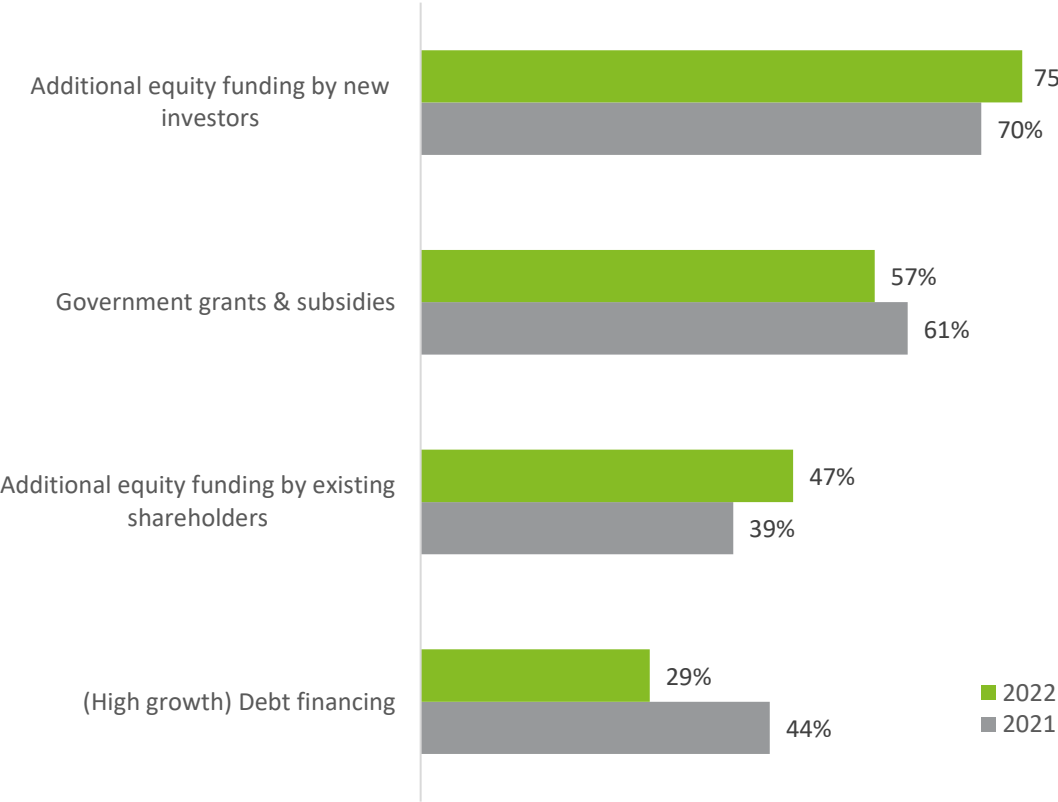


Q: What funding amount are you looking for? (in €)

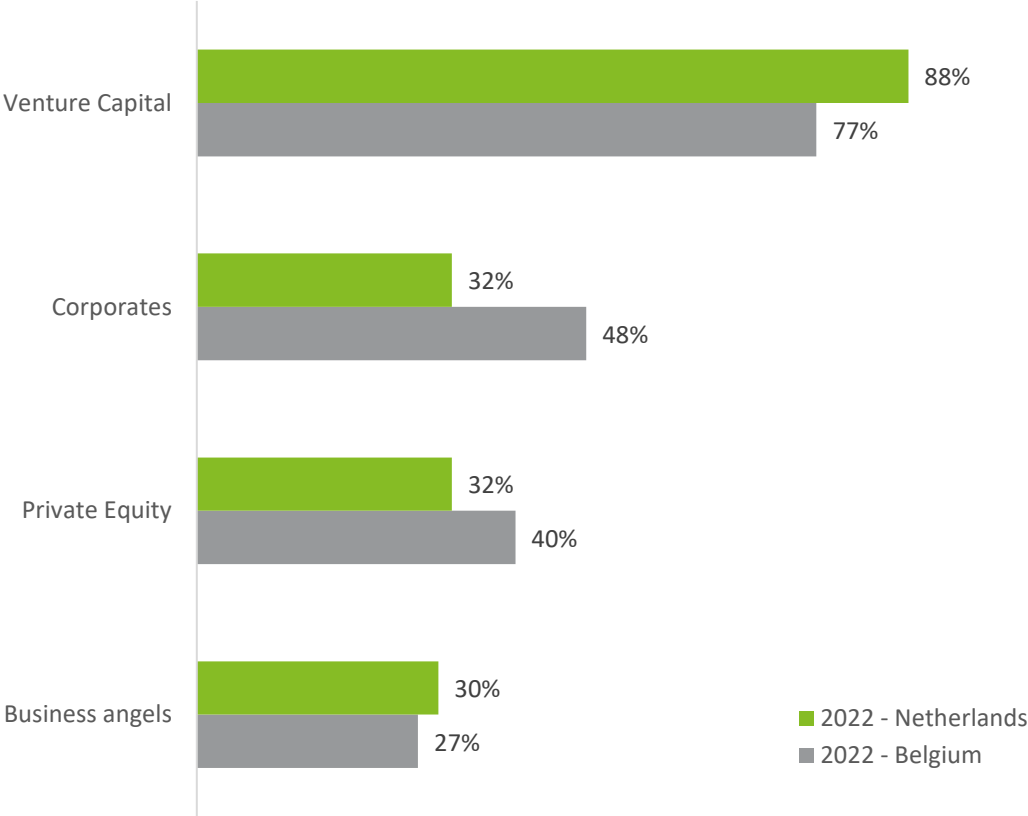


Additional equity funding by new investors remains the most popular form of acquiring funding, high growth debt financing took a sharp decline in 2022, down by 10%

Q: What types of funding do you consider to fuel your growth trajectory?

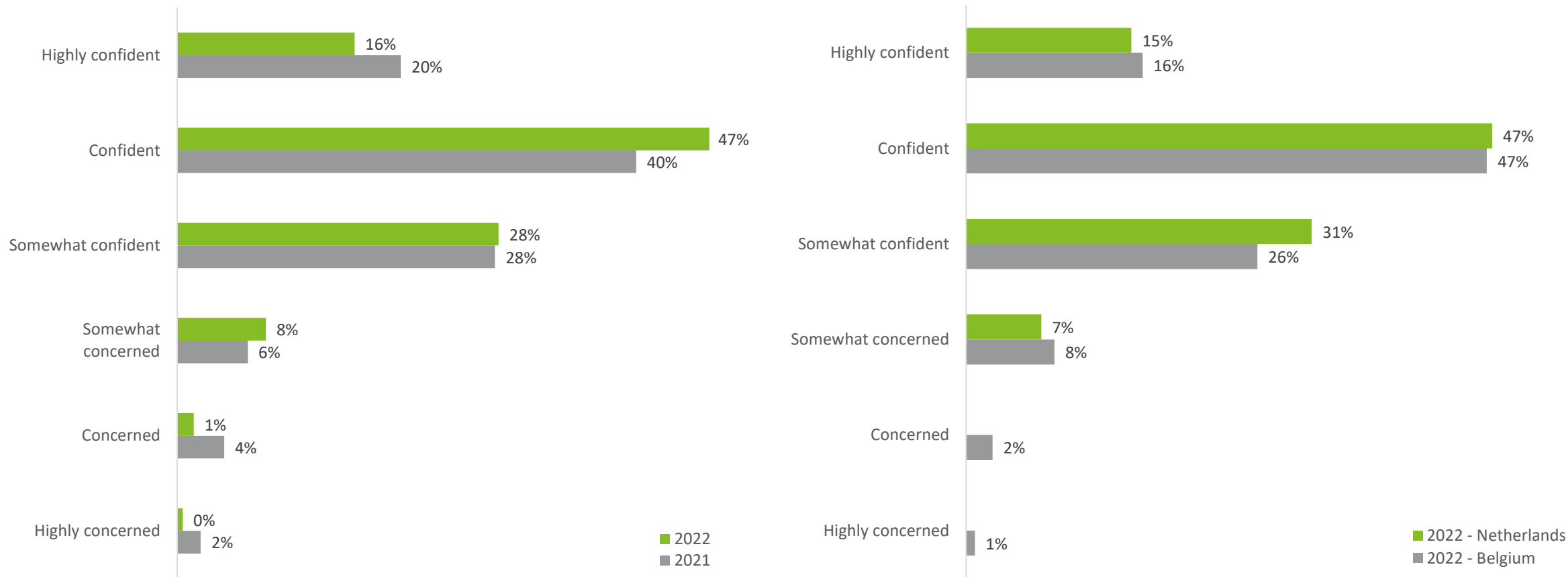


Q: Which types of new investors are you considering?



The vast majority of scale-ups remain confident that they will obtain their required funding

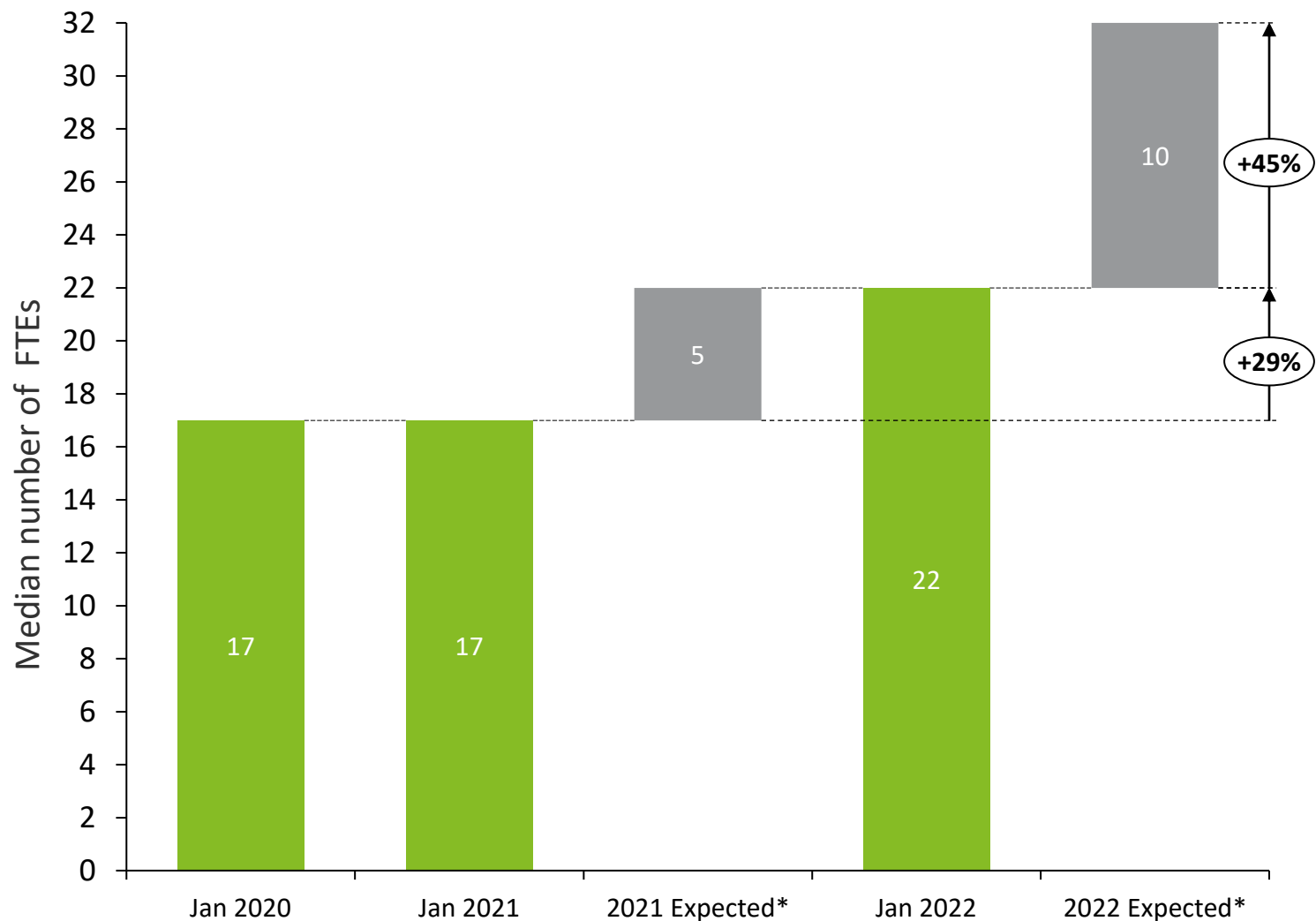
Q: How confident are you that you will obtain the required funding?



Talent & organization



Talent attraction is expected to grow in 2022 with the median expected FTE growth set to 10 FTEs, compared to 5 in 2021

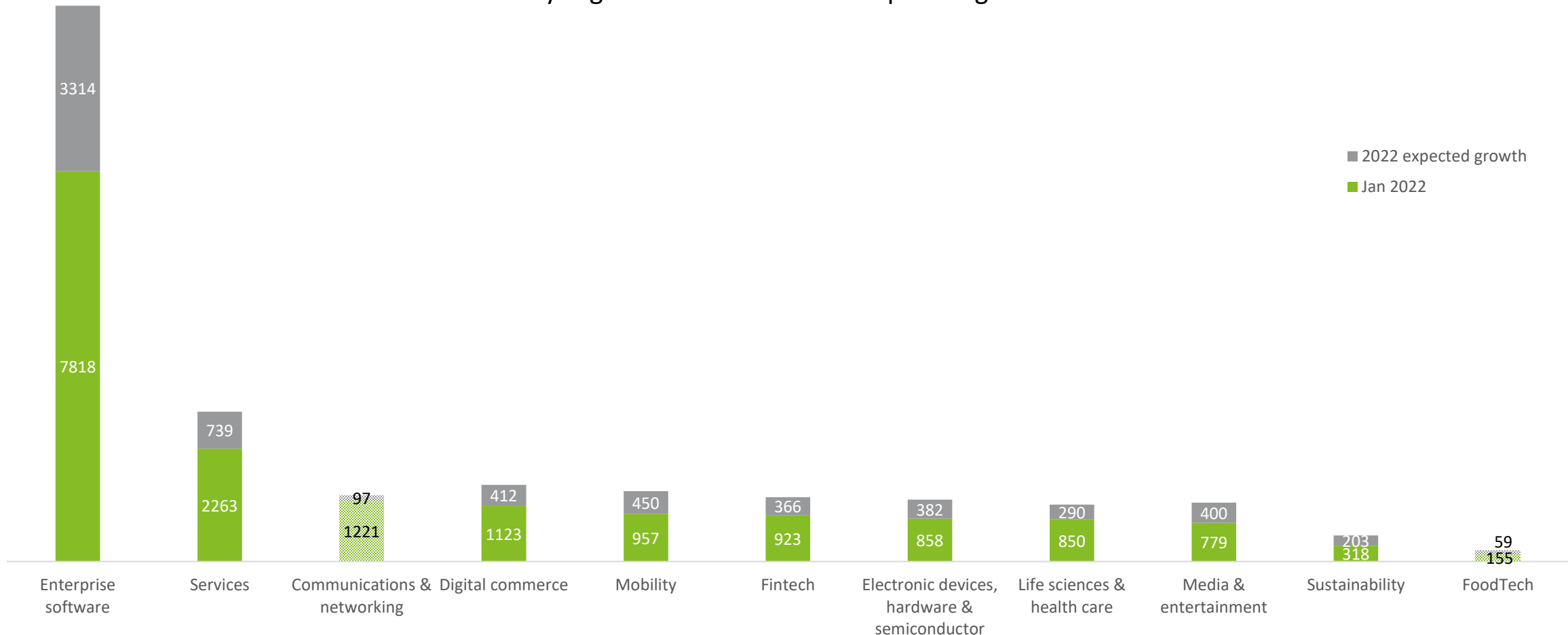


In 2021, scale-ups expected a median FTE growth of 5 which they realised in 2022, growing 29%.

Median FTE growth is expected to double and reach 10 in 2022 which leads to an expected median growth of 45%.

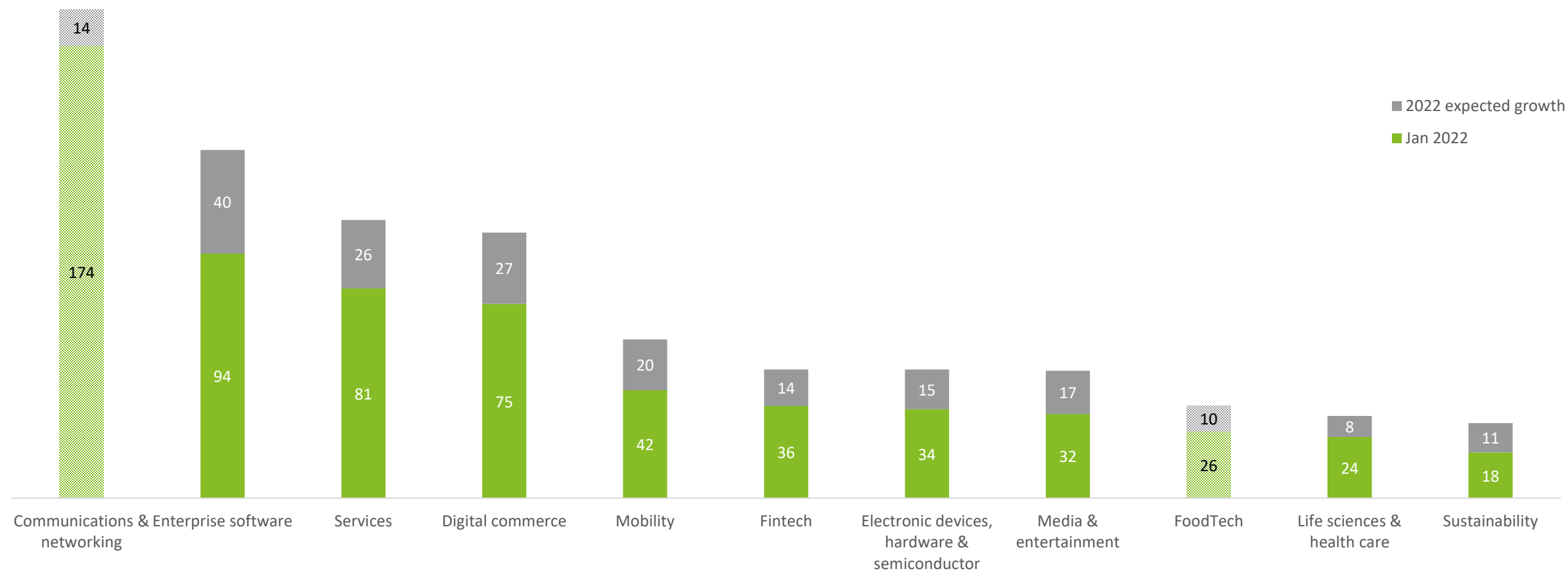
By the end of 2022, respondents expect to increase their headcount with 6712 FTEs, with the highest expected FTE growth in Sustainability at 64%, followed by Media & entertainment with 51% growth

FTEs by segment in Jan 2022 and expected growth

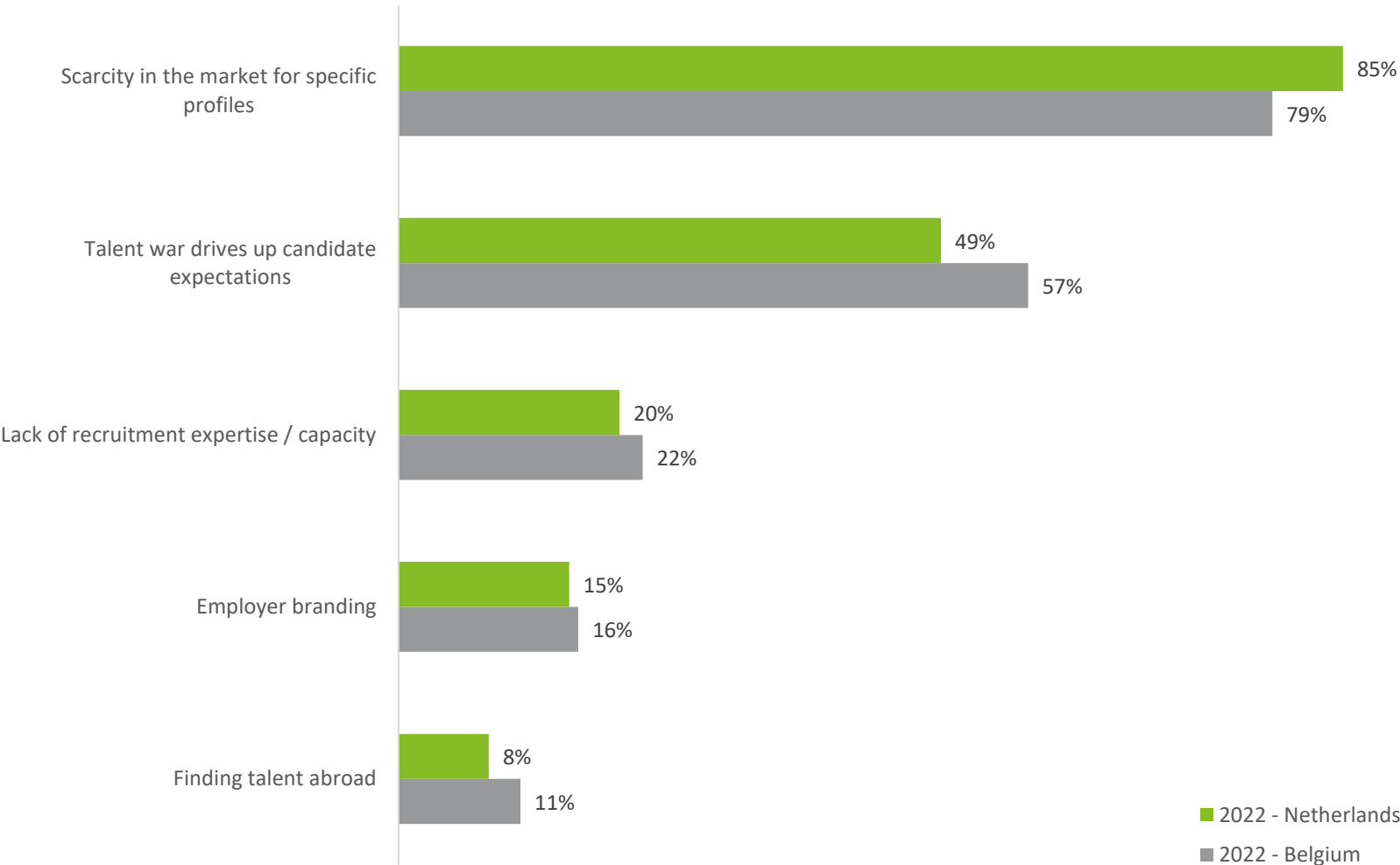


Enterprise software scale-ups expect the highest average FTE growth in 2022 with on average 40 new FTEs, whilst Sustainability scale-ups expect the highest percentage growth from an average of 11 FTEs to 18

Average # FTEs by segment in Jan 2022 and expected growth



Notably, one of the key challenges in attracting new talent is the scarcity of specific profiles, which is complicated further by the ongoing fight for talent increasing candidate expectations



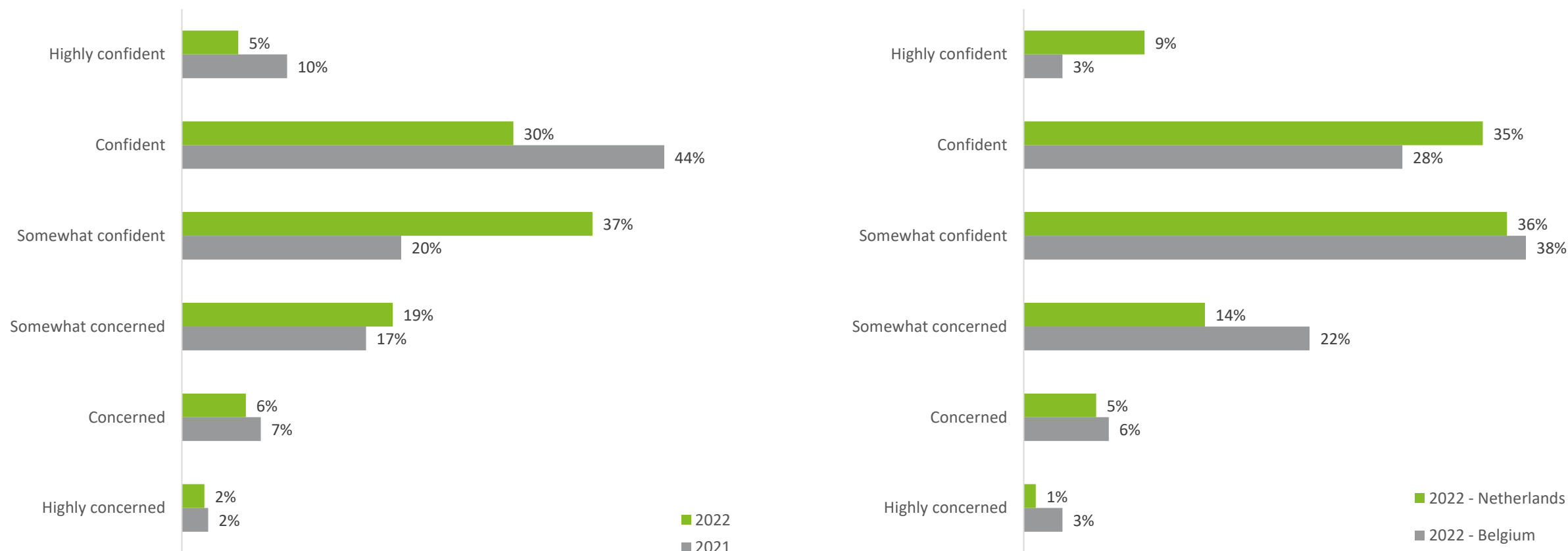
Scarcity for specific profiles is the most significant challenge in attracting talent both in Belgium (79%) and the Netherlands (85%).

However, Belgian scale-ups face more difficulty managing the increasing candidate expectations due to the current fight for talent.

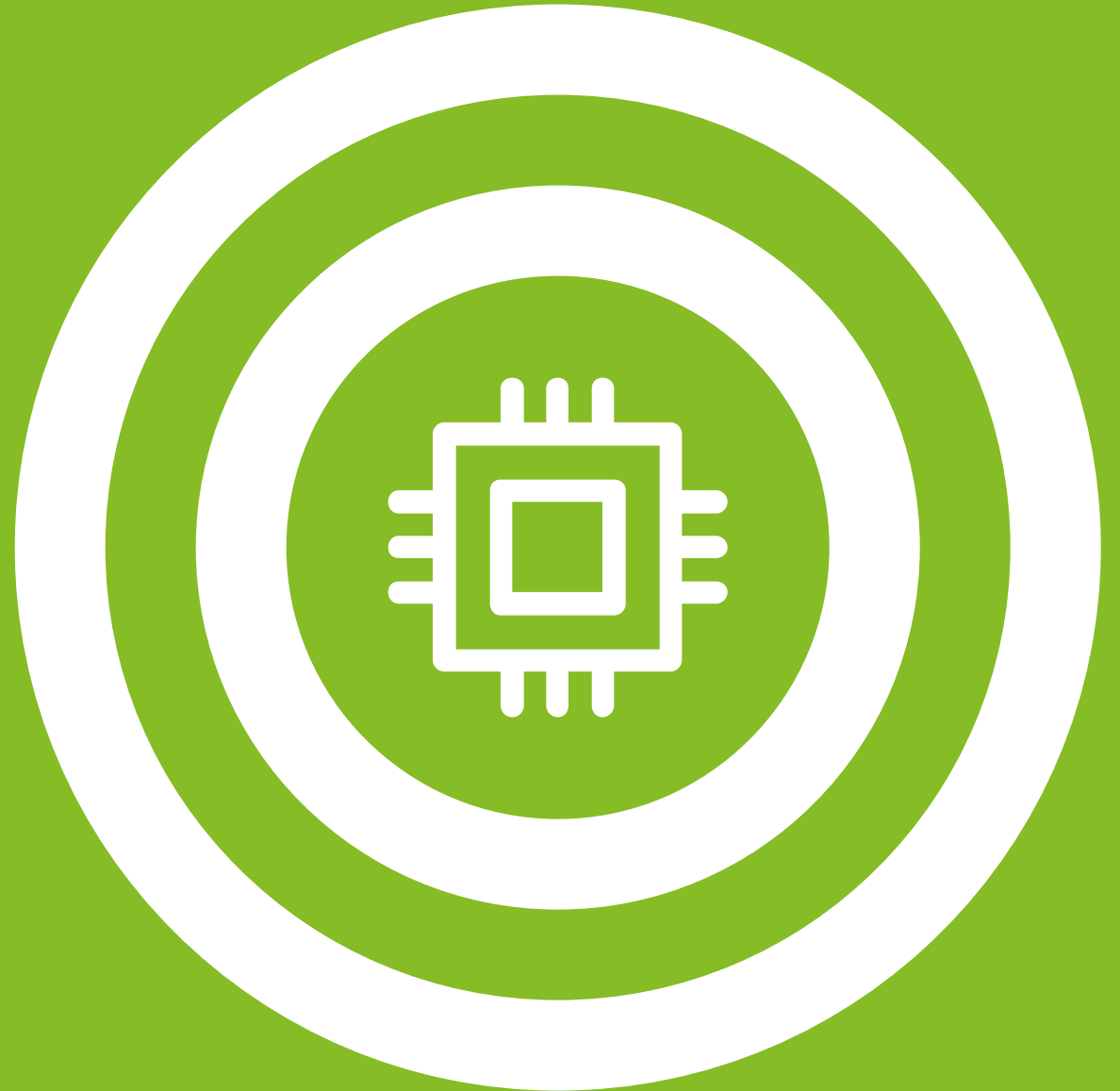
The number of scale-ups who reported being confident to highly confident in finding the right talent drastically reduced in 2022, from 54% in 2021 to 35% in 2022. Belgian scale-ups are more concerned than Dutch scale-ups (31% for Belgium and 20% for the Netherlands)



Q: How confident are you that you will find the right talent for your business?

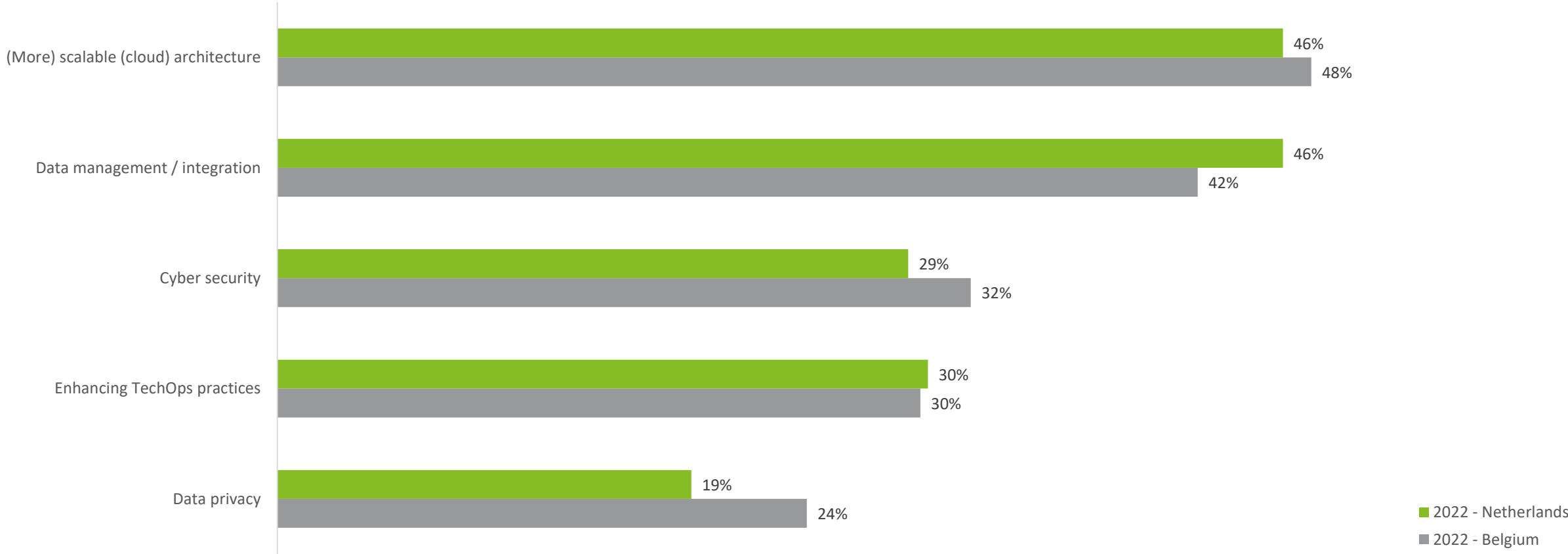


Technology scalability & security



Scalability of cloud architecture is the top technology priority amongst respondents for Belgium and the Netherlands. Data privacy is less of a priority for Dutch scale-ups than Belgian ones

Q: What are the technology investment priorities for your company?

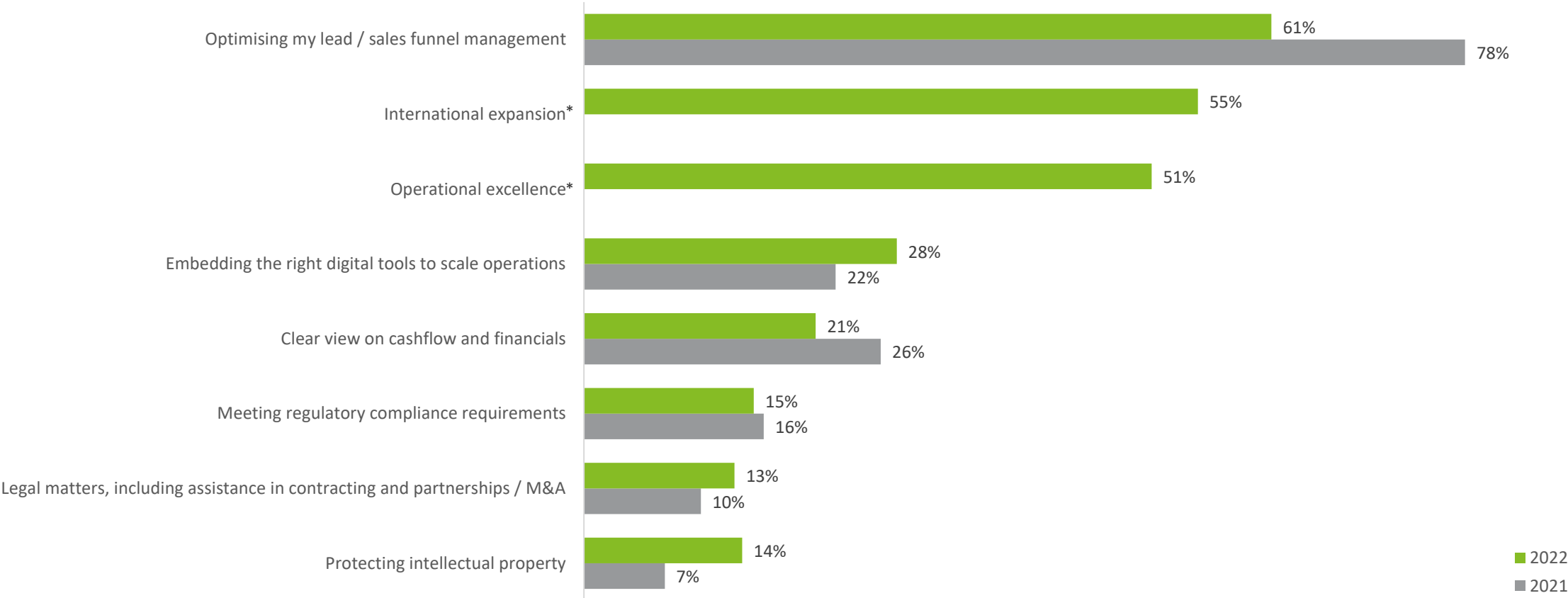


Digital operations



Optimising leads/sales funnel management remains the area with the most improvement potential for scale-ups in 2022 yet has declined 17% from 2021. International expansion (new option in this year's survey) was also flagged by 55% of respondents

Q: For which of the below items do you see most improvement potential within your company?

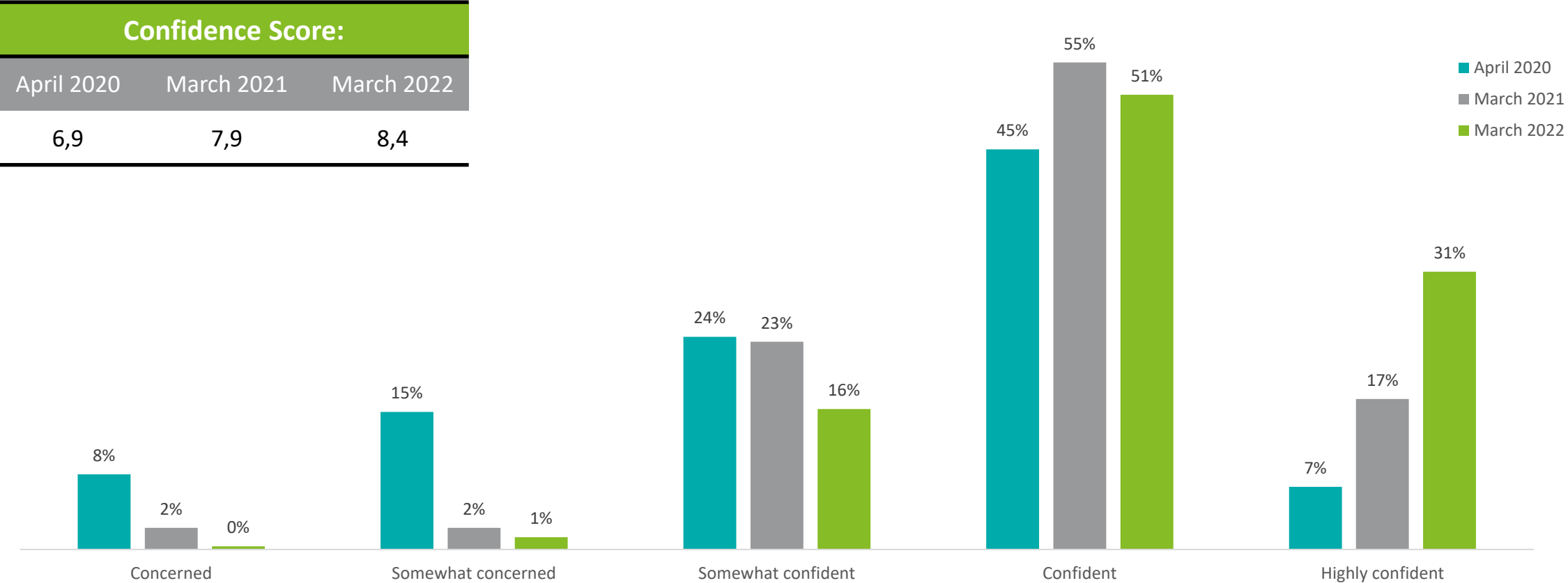


Confidence



Confidence levels have significantly improved over the past two years, with average confidence score now up at 8,4/10

How confident are you that your business can continue or even accelerate its growth trajectory?





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Confidence Score:

8,6

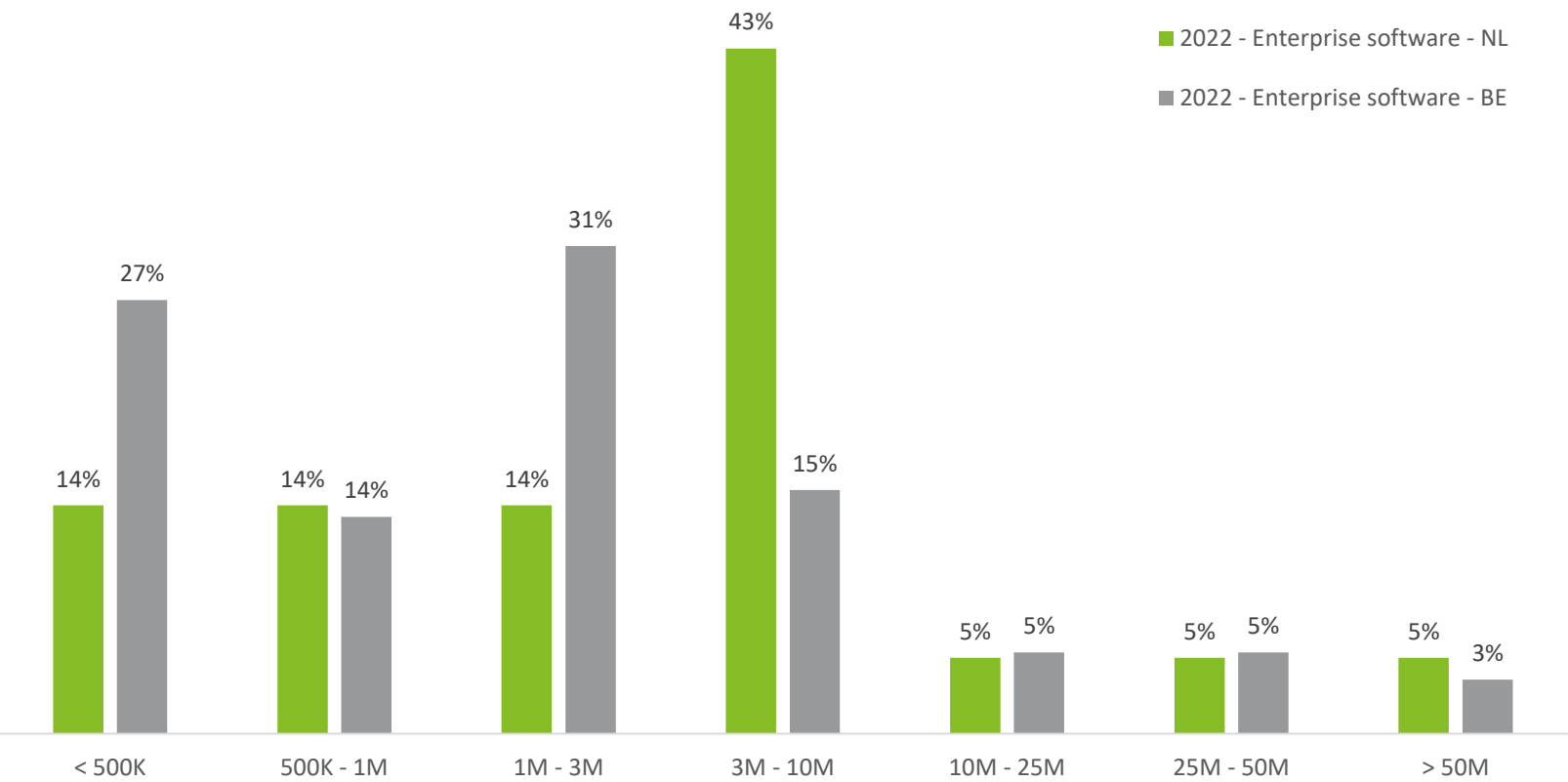
Detailed segments analysis

Enterprise software



83 Enterprise software scale-ups responded in this year's survey with 59 respondents from Belgium and 21 from the Netherlands

Percentage of respondents per revenue band

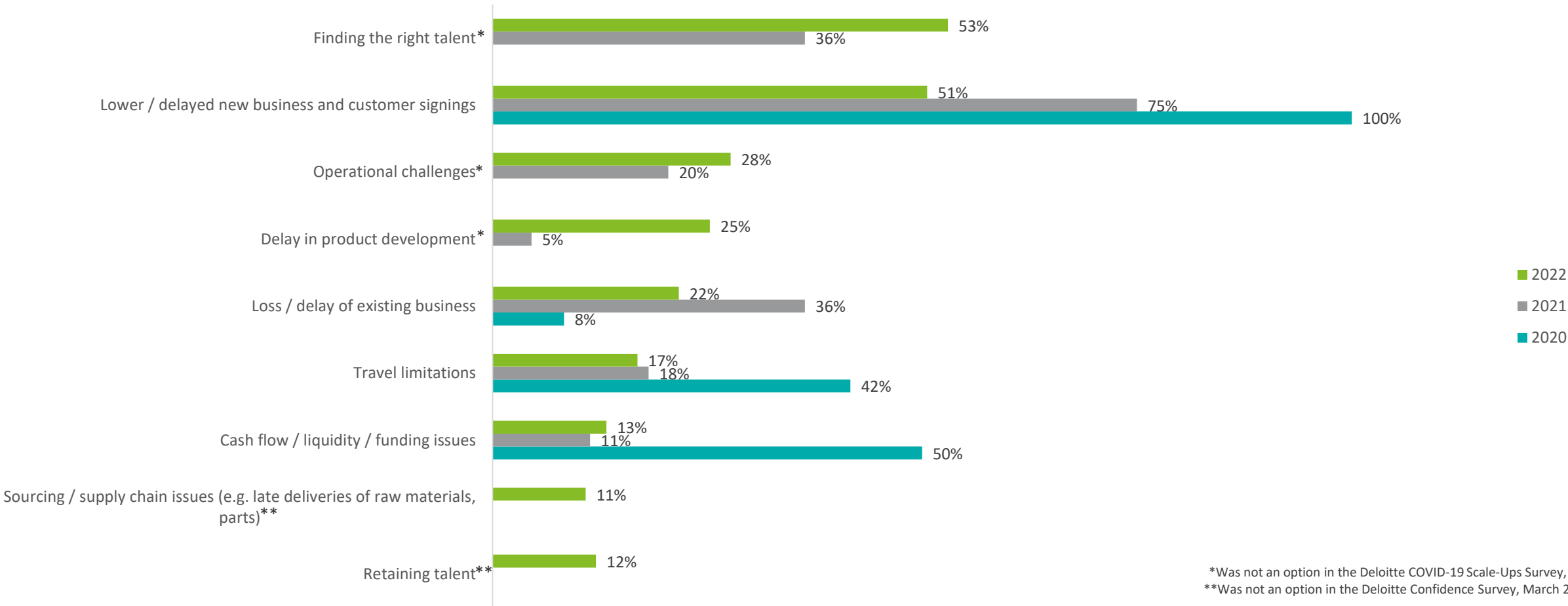


Enterprise software scale-ups constitute the largest group of participants to the 2022 Confidence Survey at 29%.

Enterprise software scale-ups have known the highest FTE growth in 2021, increasing their headcount by 74% on average.

Finding the right talent was the biggest challenge for scale-ups growing 17%, closely followed by lower/delayed new business and customer signings

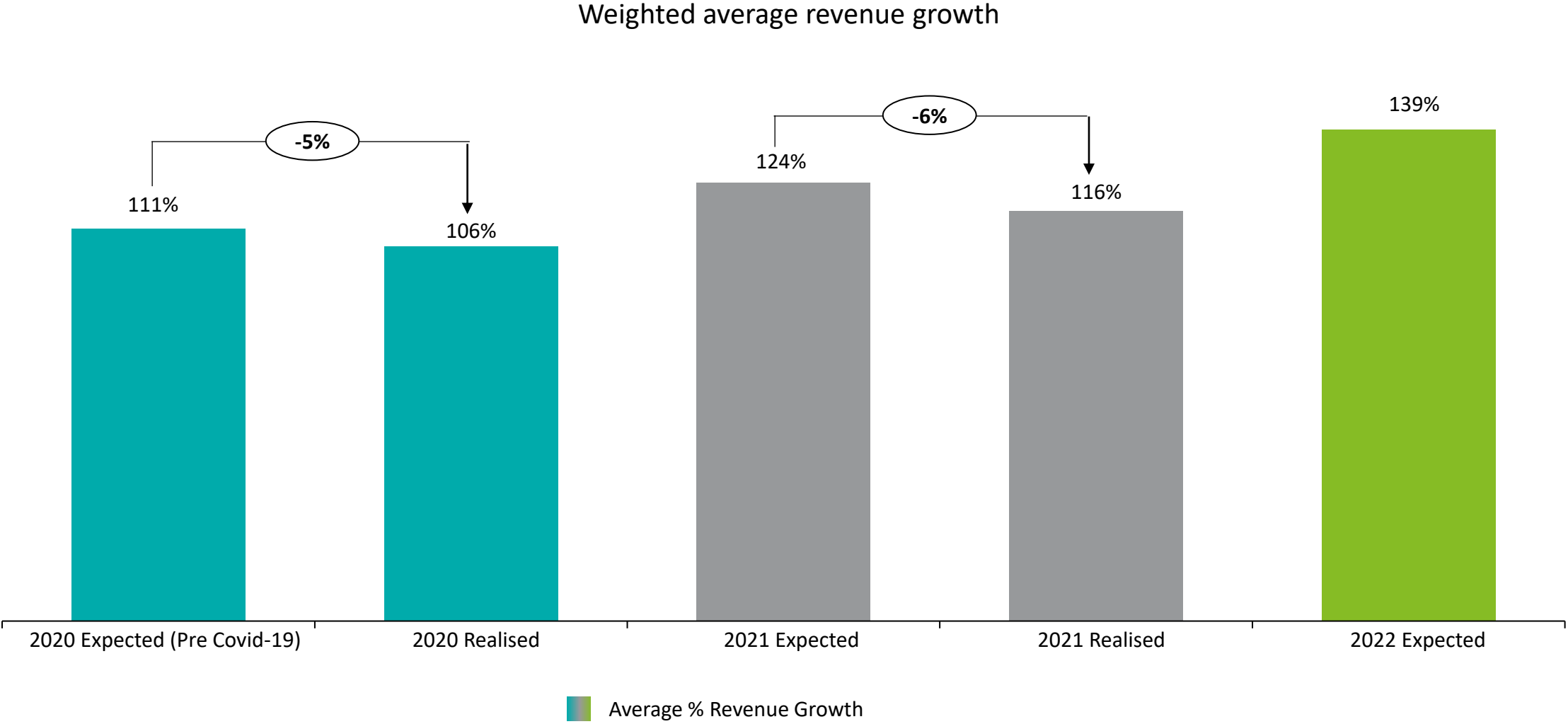
Q: Looking back, what were the biggest challenges to reach your growth ambition?



*Was not an option in the Deloitte COVID-19 Scale-Ups Survey, April 2020

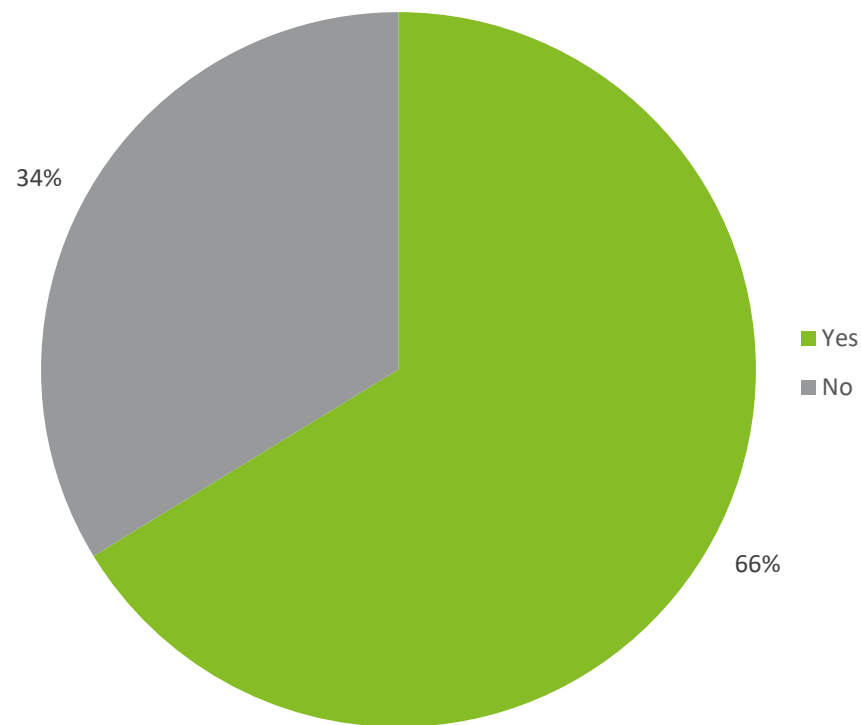
**Was not an option in the Deloitte Confidence Survey, March 2021

Enterprise software companies realised a 116% revenue growth in 2021 which is an increase of 10% from 2020 realised revenue growth

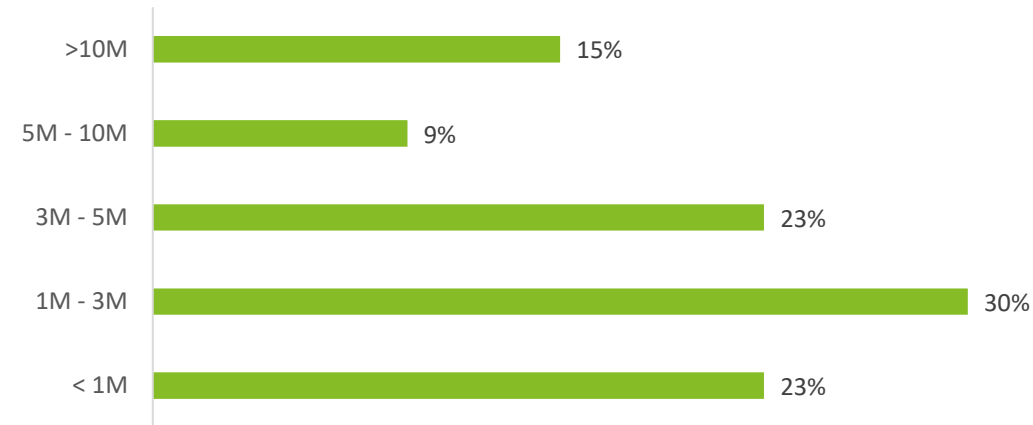


66% of Enterprise software scale-ups seek additional funding, with 53% of them looking for funding < 3 million euro

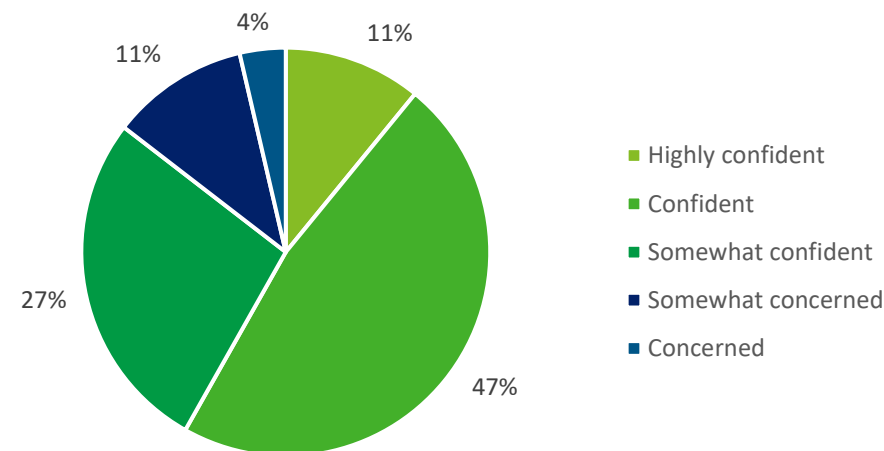
Q: Do you seek additional funding?



Q: What funding amount are you looking for? (in €)

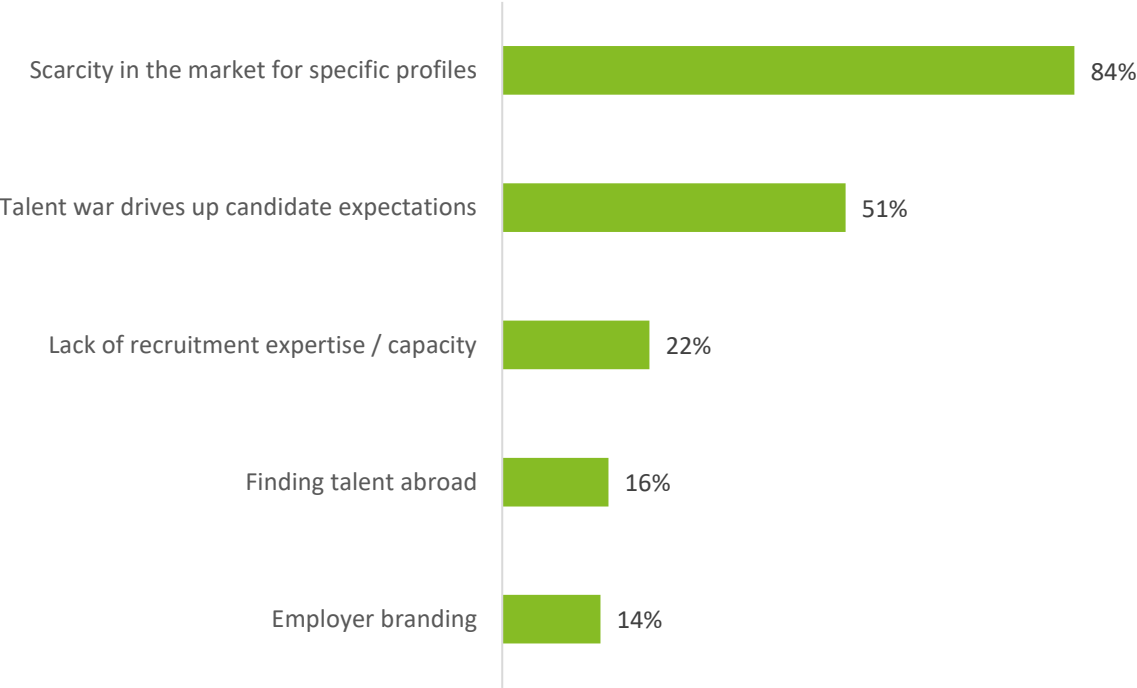


Confidence in obtaining the required funding

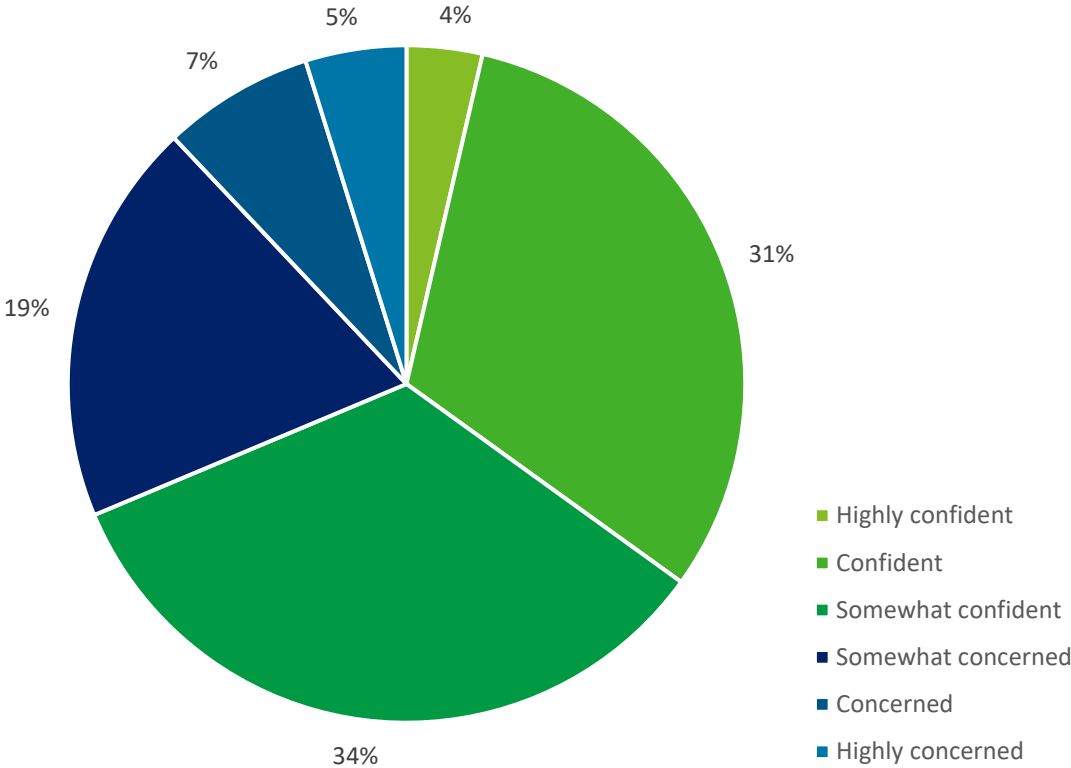


Enterprise software scale-ups list the scarcity in the market for specific profiles and the fight for talent as their main hurdles, yet 31% of scale-ups is concerned that they will not find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,2

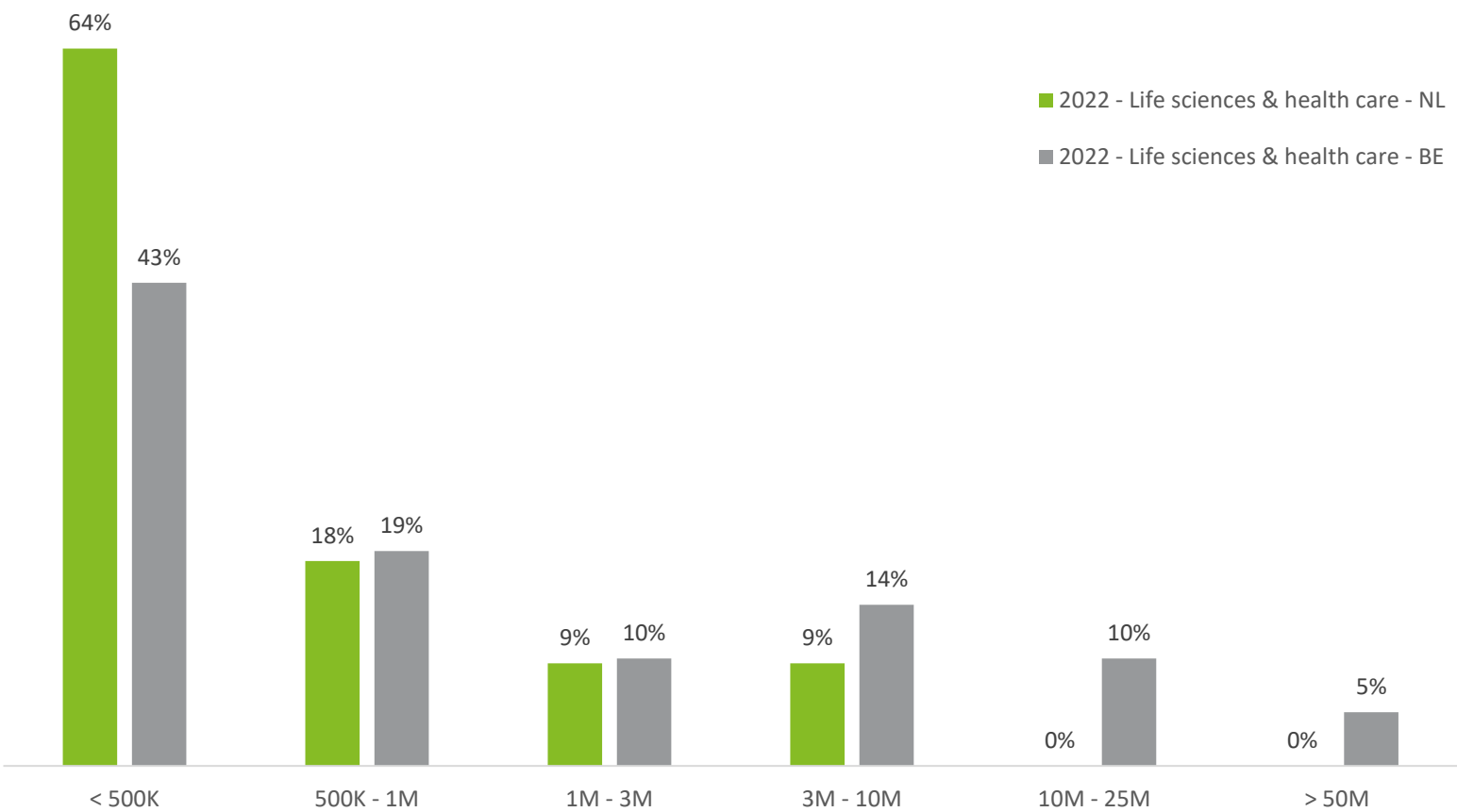
Detailed segments analysis

Life sciences & healthcare



36 Life sciences & healthcare scale-ups responded in this year's survey with 22 respondents from Belgium and 13 from the Netherlands

Percentage of respondents per revenue band

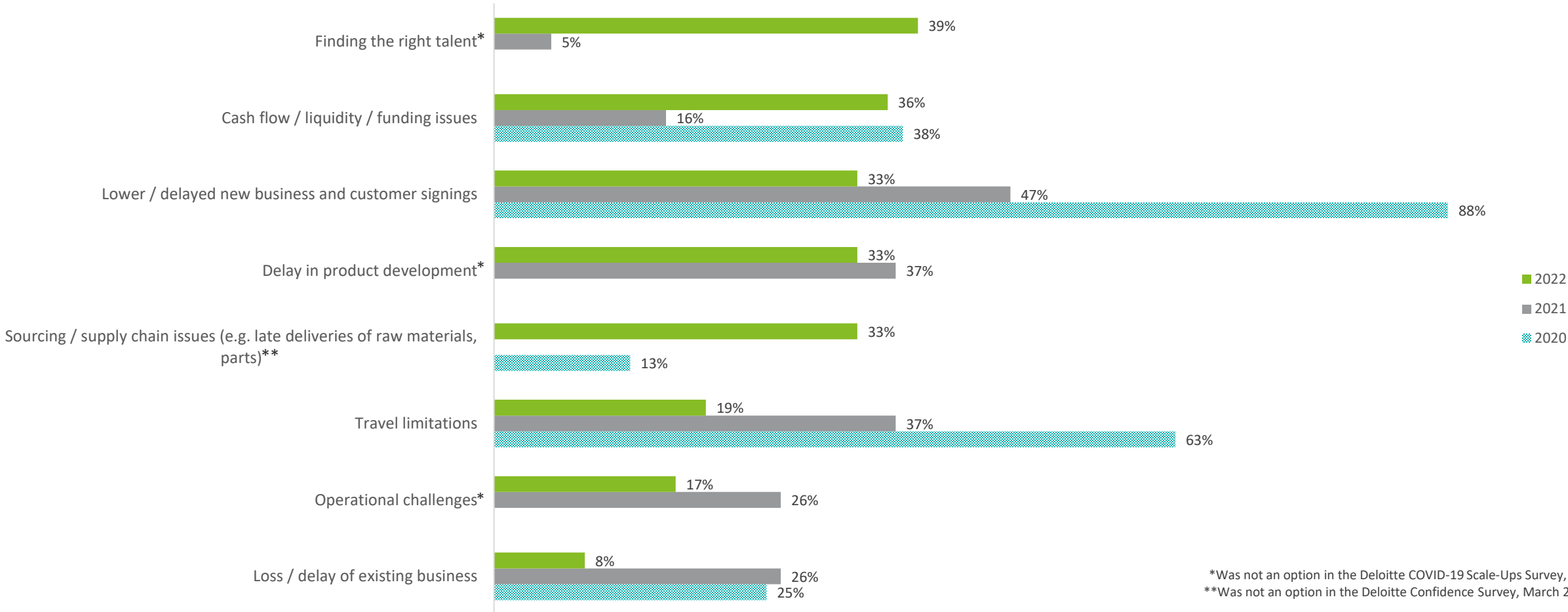


Almost half of the life sciences & healthcare scale-ups have a revenue below 500 thousand euro.

Life sciences & healthcare scale-ups had the largest percentage (67%) of scale-ups realising their expected growth compared with other scale-ups

Unlike scale-ups from other segments, Life sciences & healthcare scale-ups list cash flow, liquidity and funding issues as their second biggest challenge

Q: Looking back, what were the biggest challenges to reach your growth ambition?



*Was not an option in the Deloitte COVID-19 Scale-Ups Survey, April 2020

**Was not an option in the Deloitte Confidence Survey, March 2021

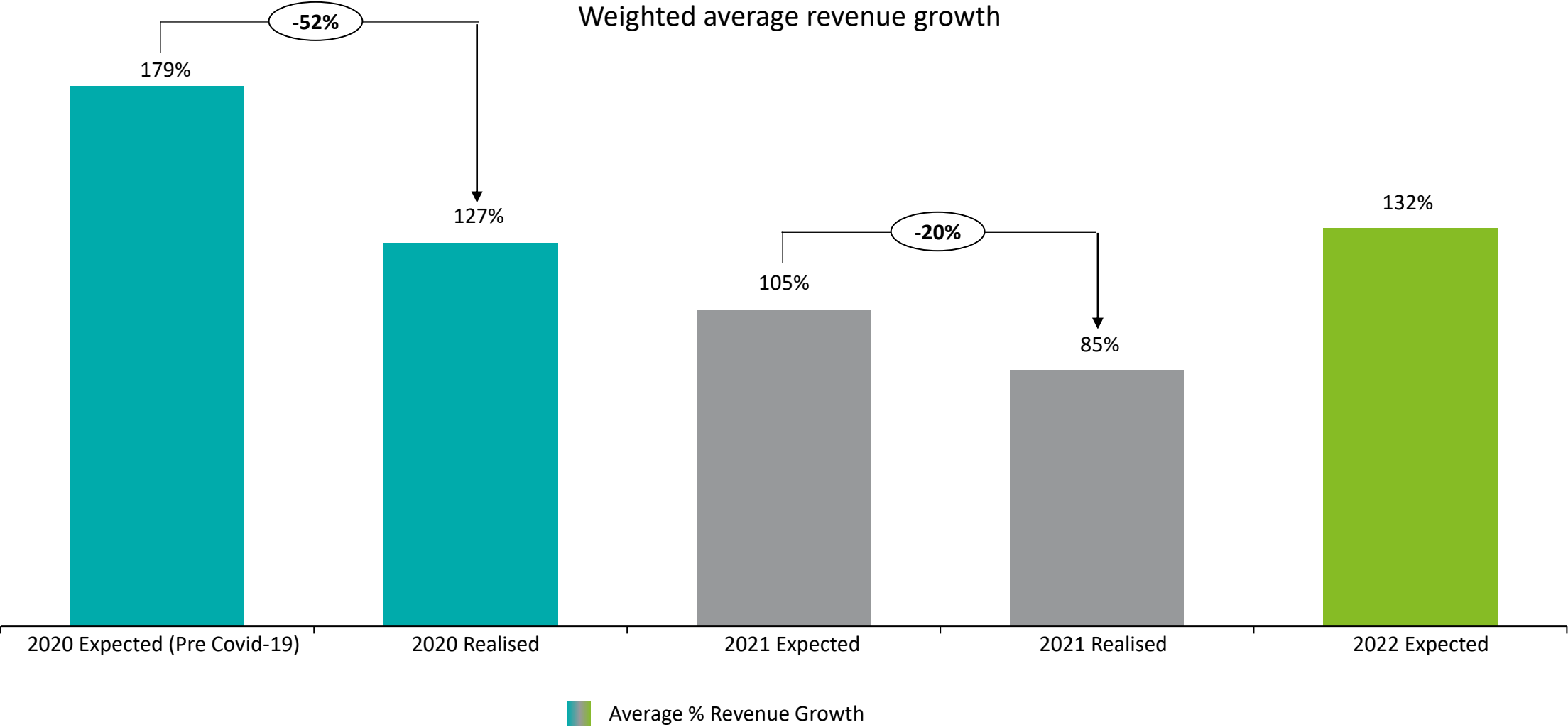
Bars are shaded if fewer than 10 respondents

Source: Deloitte COVID-19 Scale-ups Survey, April 2020. N = 8

Source: Deloitte Confidence Survey, March 2021, Question 10. N = 19

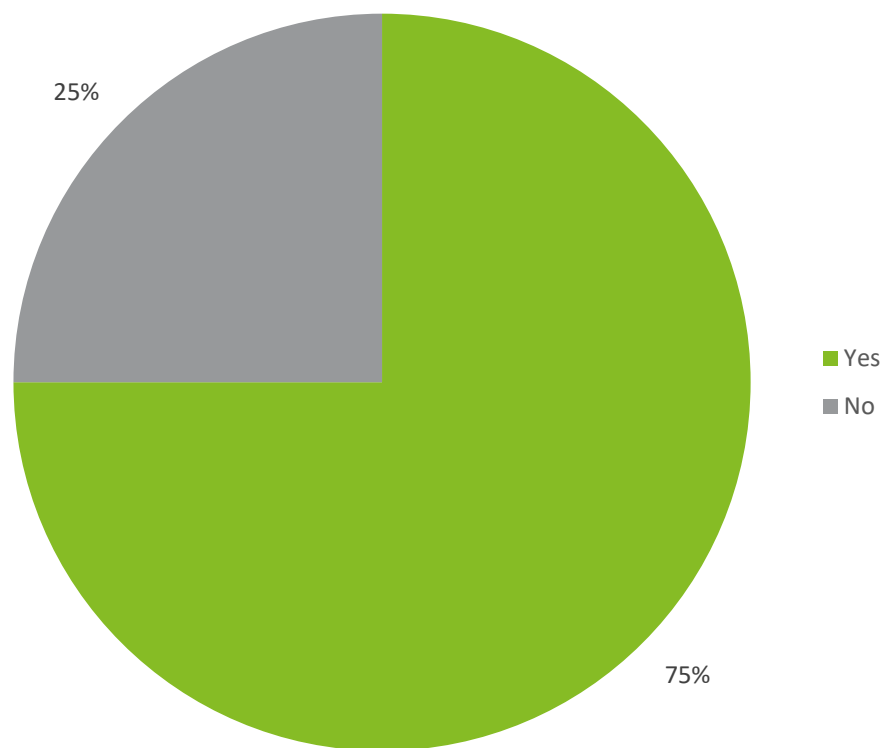
Source: Deloitte Confidence Survey, March 2022, Question 2.5. N = 36

After a dip in revenue growth in 2021, Life sciences & healthcare scale-ups expect to regain an exponential growth in 2022

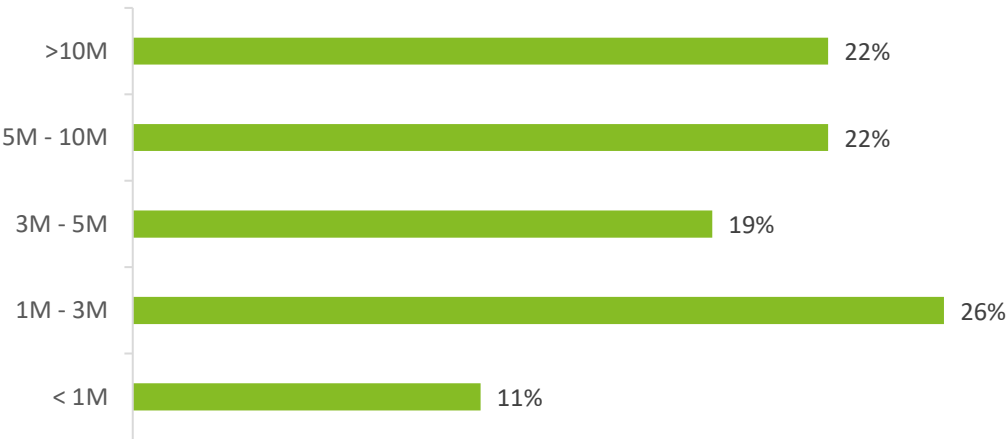


75% of Life sciences & healthcare scale-ups seek additional funding, with 44% seeking funding of more than 5 million euro. Confidence in finding the required funding is high with only 8% of scale-ups being concerned

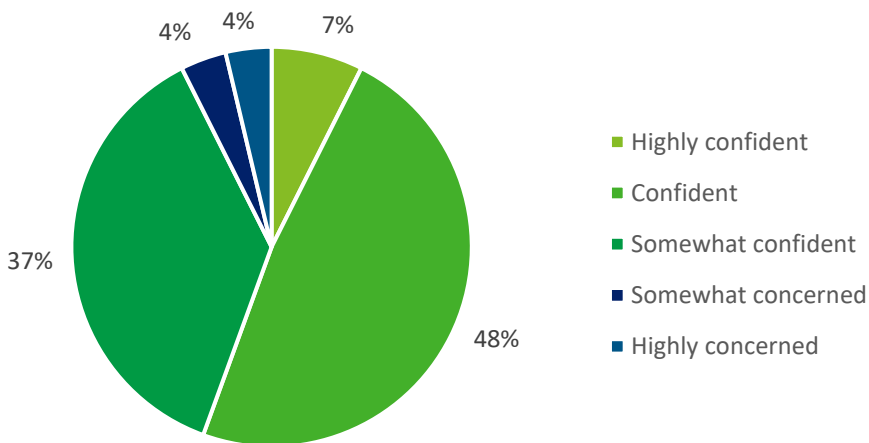
Q: Do you seek additional funding?



Q: What funding amount are you looking for? (in €)

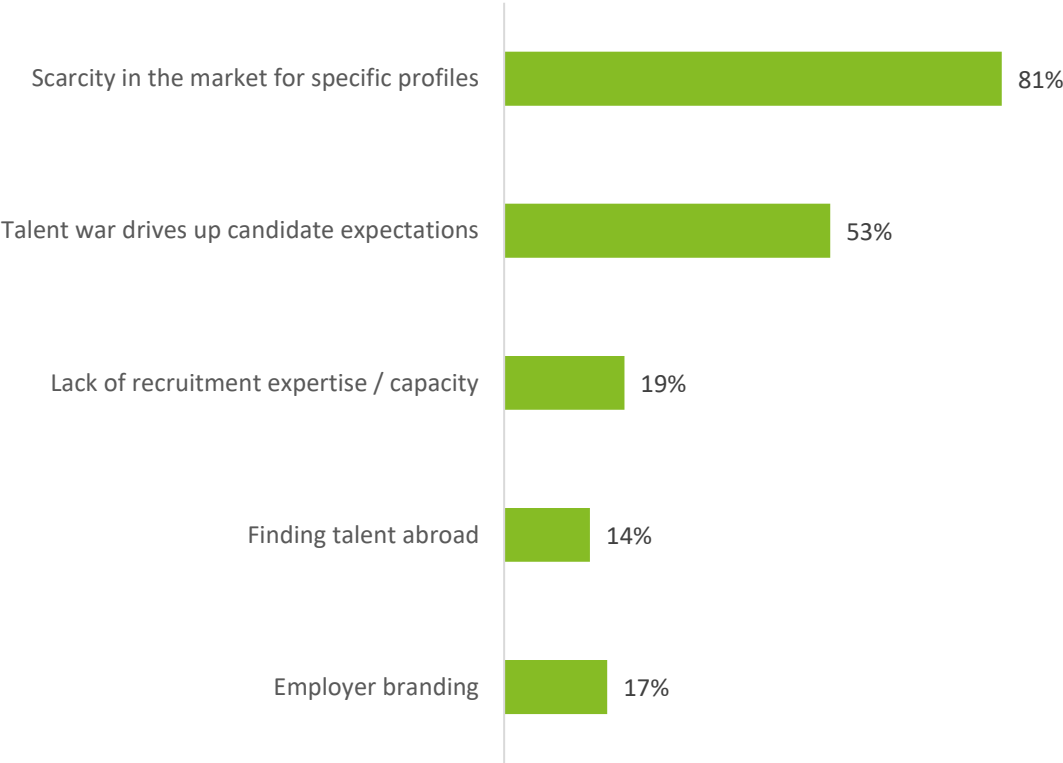


Confidence in obtaining the required funding

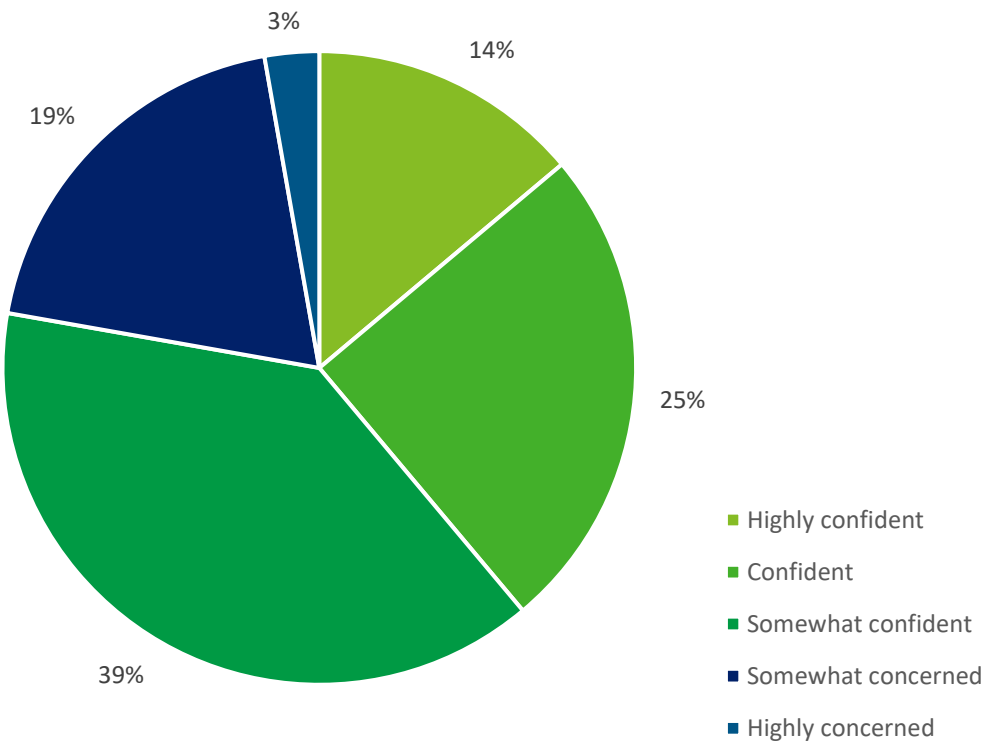


Life sciences & healthcare scale-ups list scarcity in the market for specific profiles and the fight for talent as their main hurdles, yet 78% of scale-ups is confident that they will find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,4

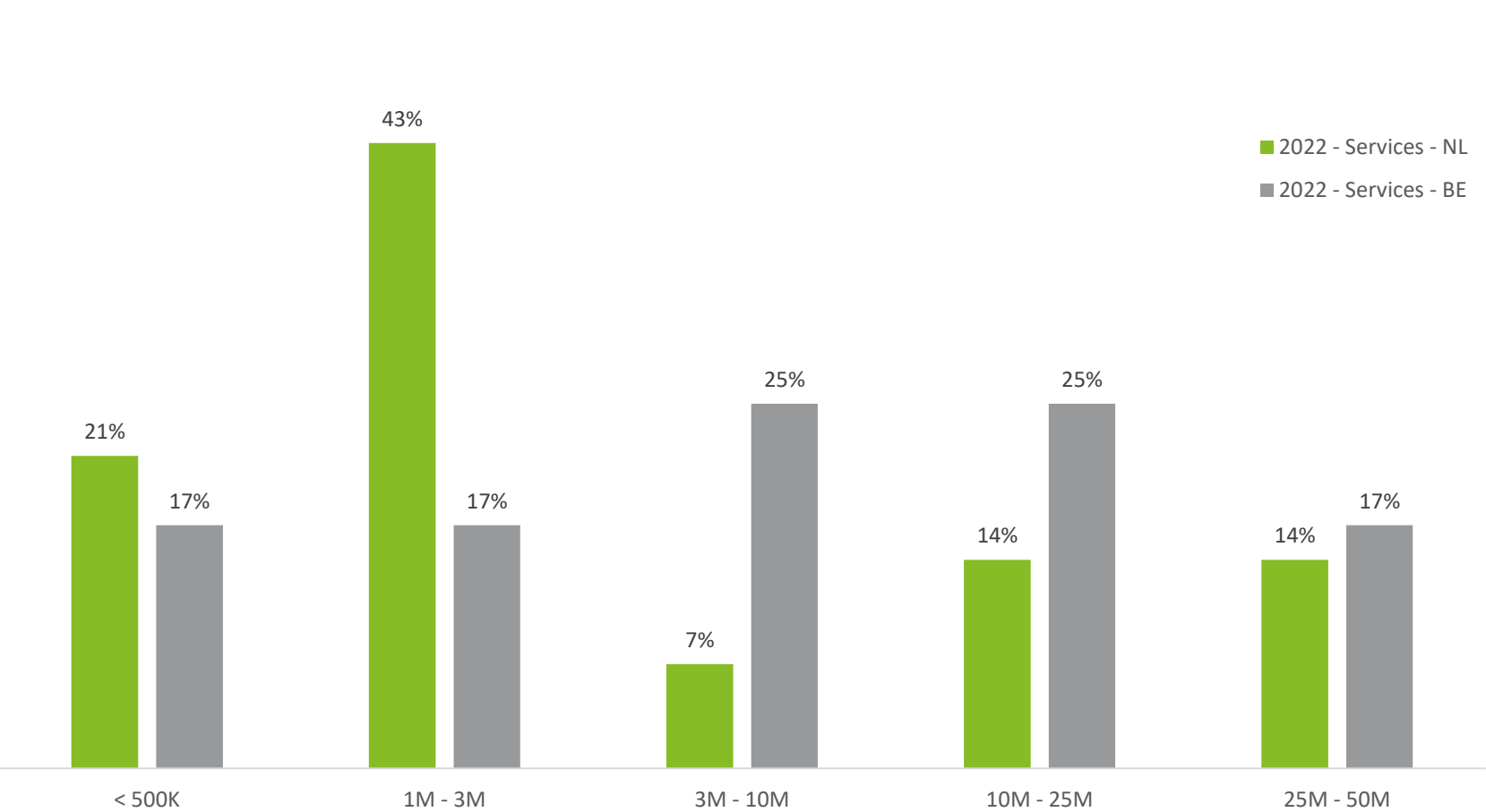
Detailed segments analysis


Services



28 Services scale-ups responded in this year's survey with 12 respondents from Belgium and 14 from the Netherlands


Percentage of respondents per revenue band





Detailed segments analysis

Services



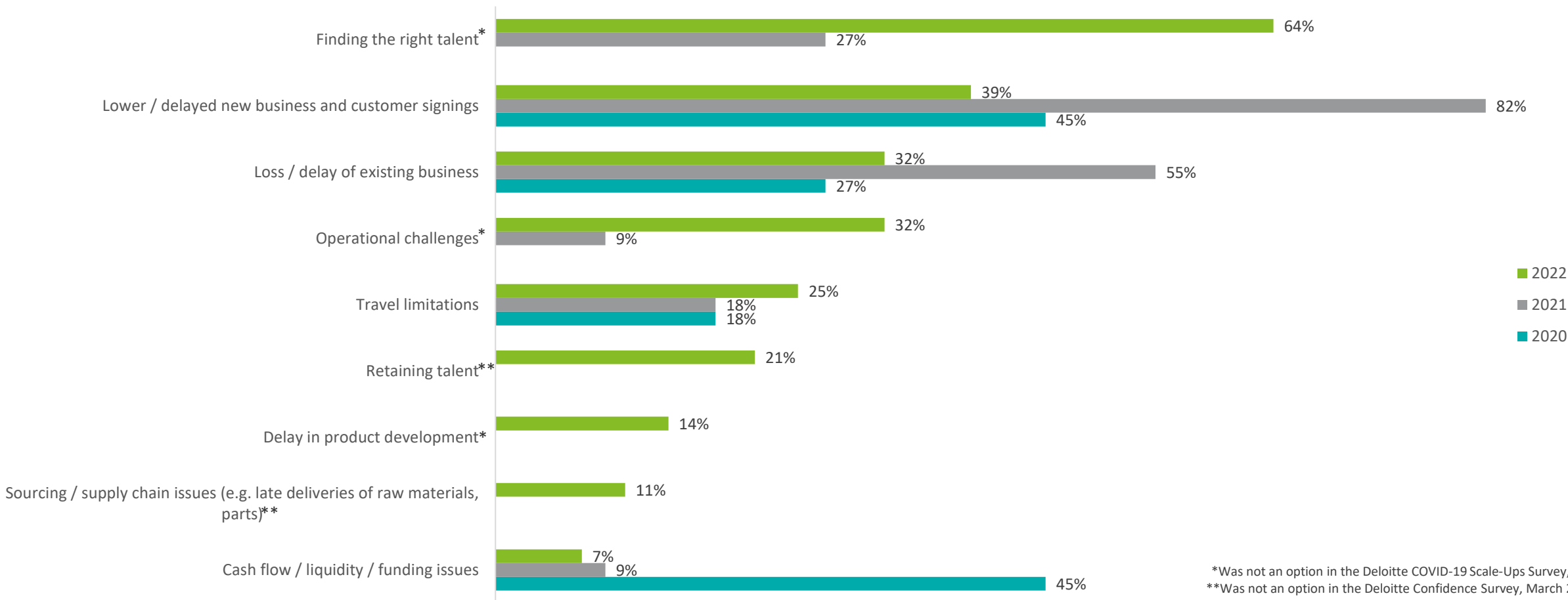
Services scale-ups managed to exceed on average their expected revenue growth in 2021 by 10%, ultimately achieving an average revenue growth of 75%.

The majority of Dutch Services scale-ups (64%) are companies with a revenue below 3 million euro.

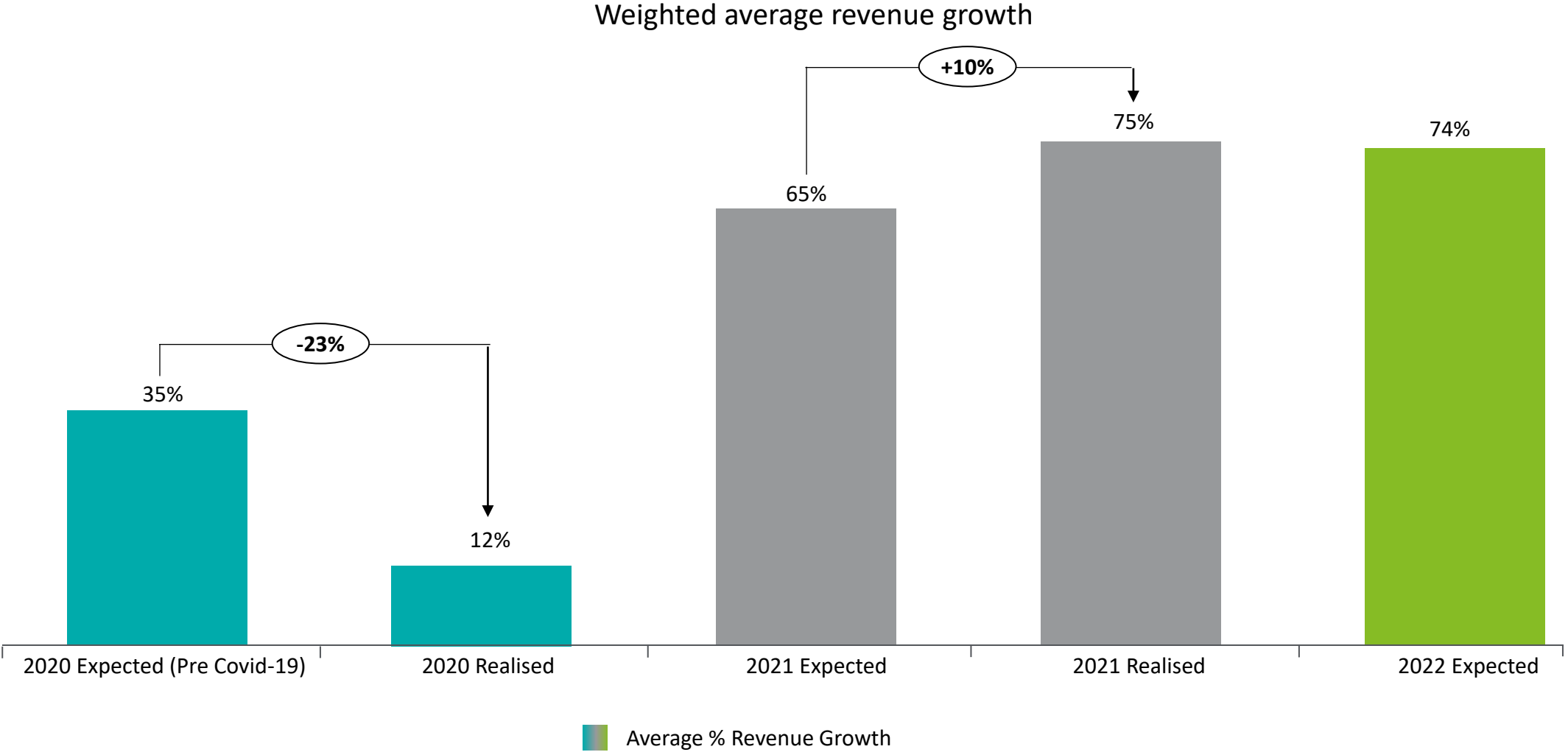
Source: Deloitte Confidence Survey, March 2022, Question 1.3 and 1.6. N = 28 (BE = 12; NL = 14)

Finding the right talent was the biggest challenge for scale-ups growing 37%. Compared to other scale-ups (18%) almost double of the Services scale-ups (32%) indicate loss and delay of existing business as a challenge

Q: Looking back, what were the biggest challenges to reach your growth ambition?

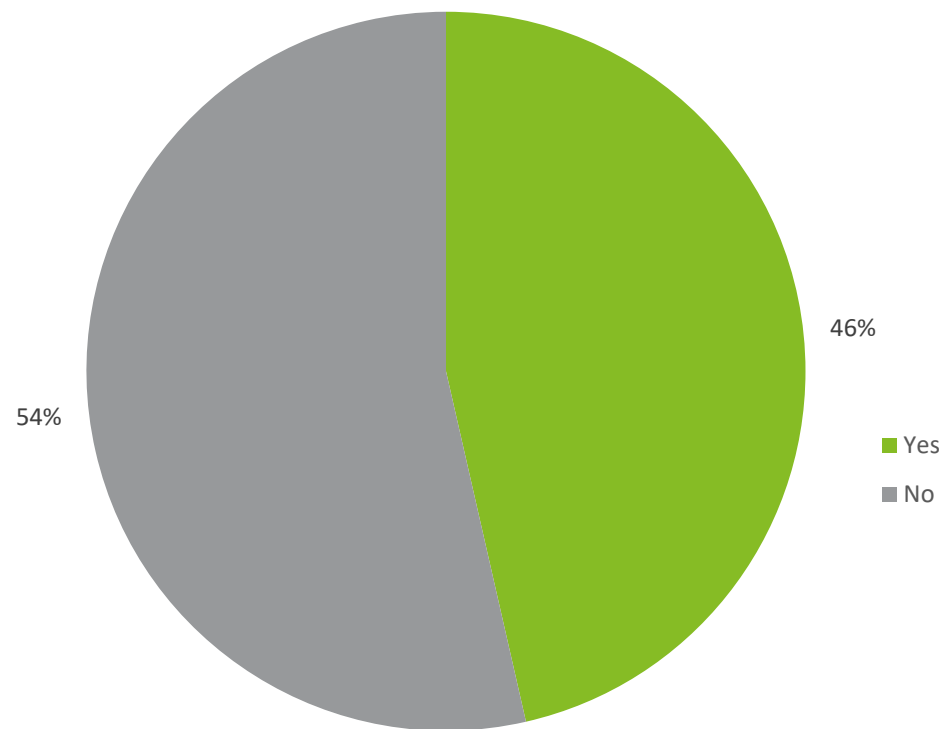


Services scale-ups managed to achieve a greater than expected revenue growth in 2021, up 10%, and expect to also achieve a similar revenue growth in 2022

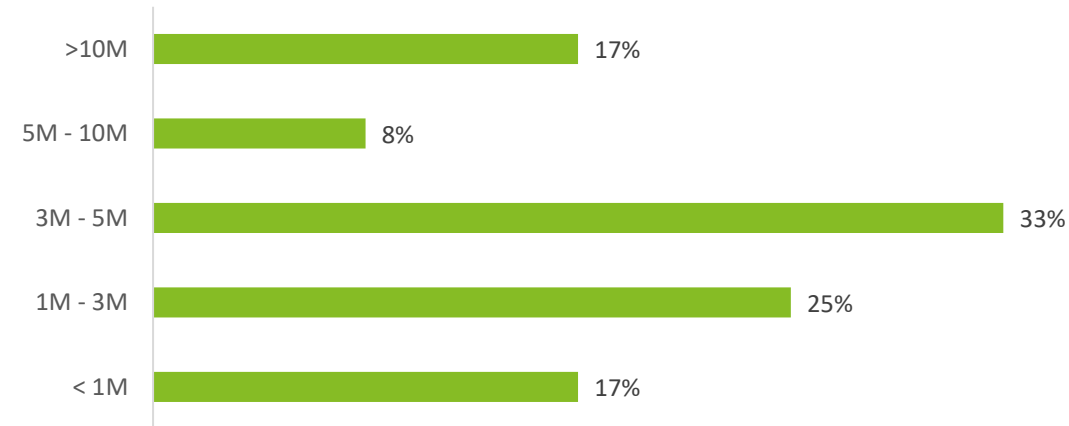


Only 46% of Services scale-ups seek additional funding, with more than half of them (58%) seeking funding of at least 3 million euro

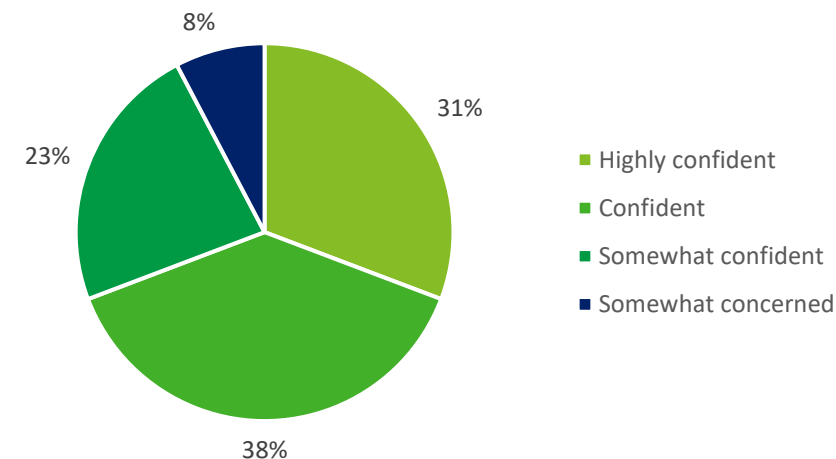
Q: Do you seek additional funding?



Q: What funding amount are you looking for? (in €)

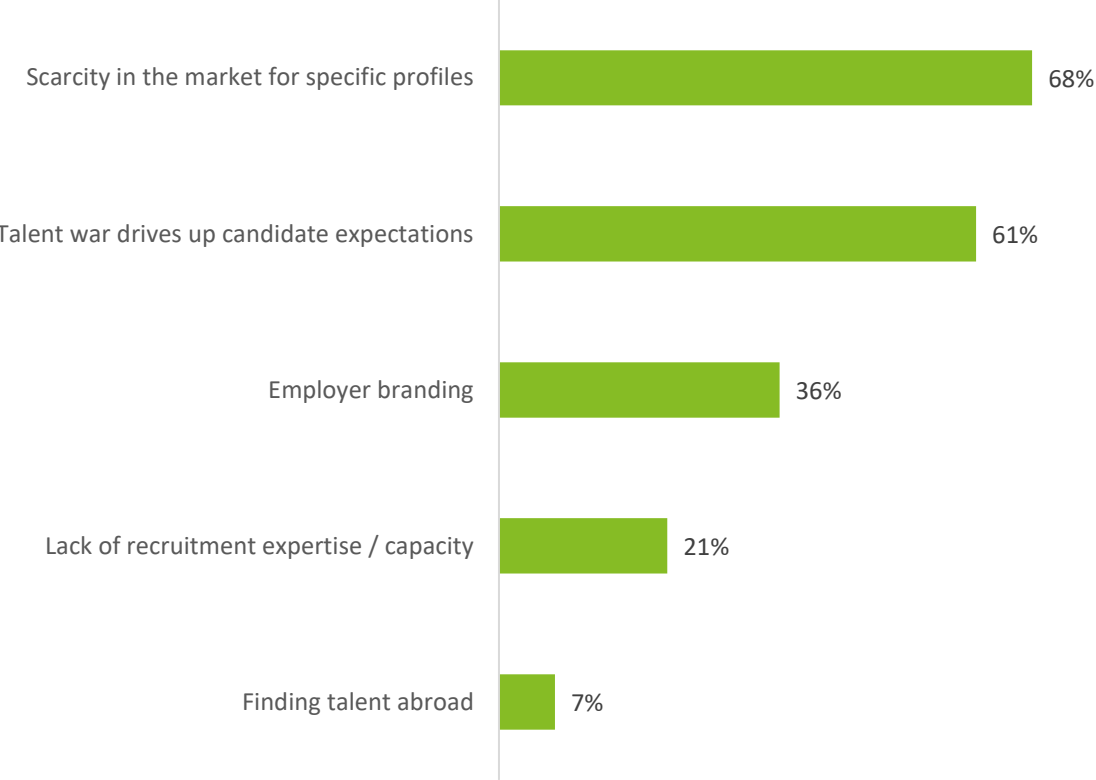


Confidence in obtaining the required funding

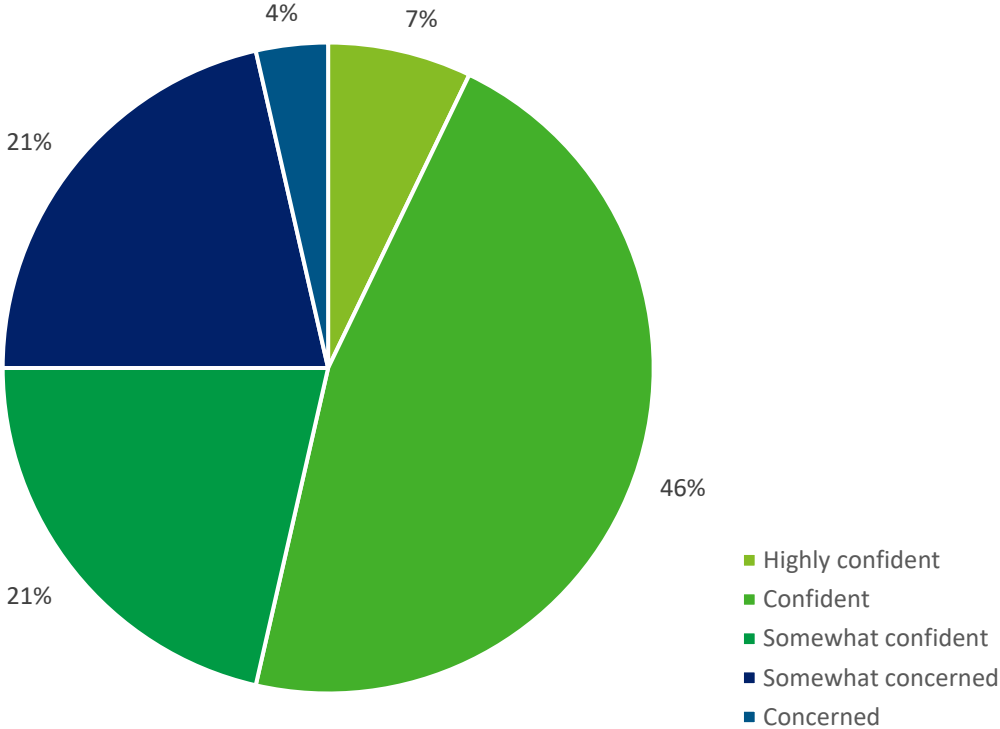


Services scale-ups list the scarcity in the market for specific profiles and the fight for talent as their main hurdles, and compared to other scale-ups (15%) more than double of services scale-ups (36%) see employer branding as a hurdle in attracting and retaining talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,6

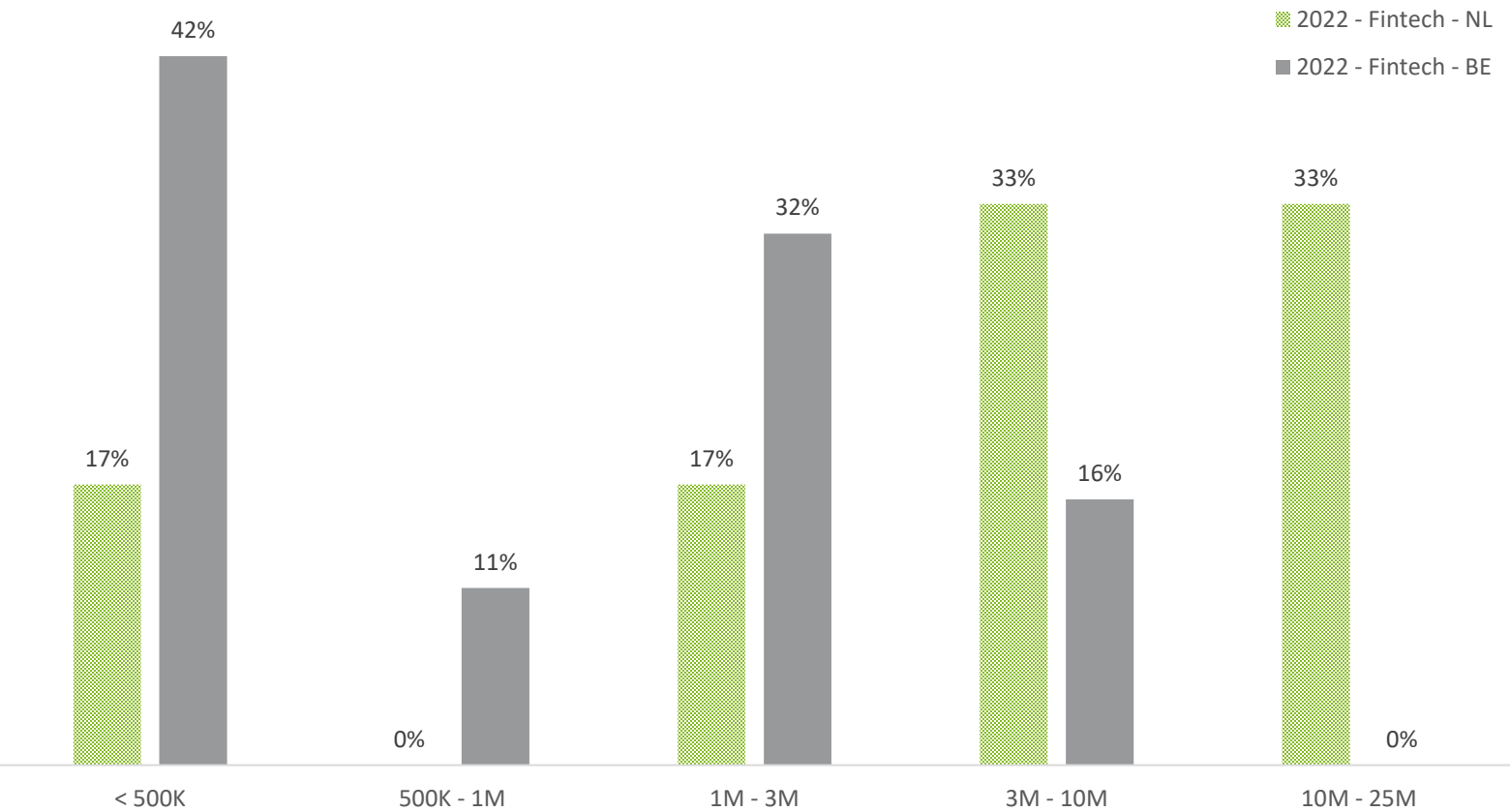
Detailed segments analysis

FinTech



26 FinTech scale-ups responded in this year's survey with 19 respondents from Belgium and 6 from the Netherlands

Percentage of respondents per revenue band

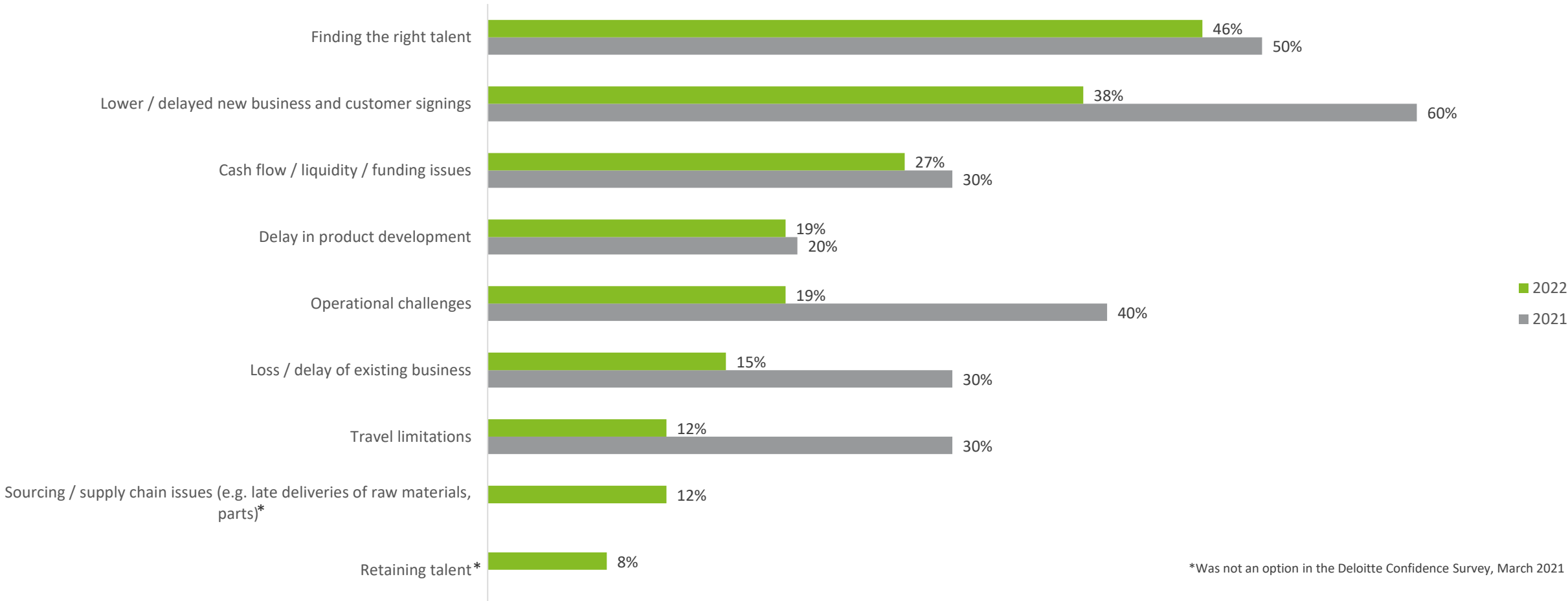


FinTech scale-ups realised a higher than expected average revenue growth in 2021, up 21% to 171%, which makes it the segment with the highest growth.

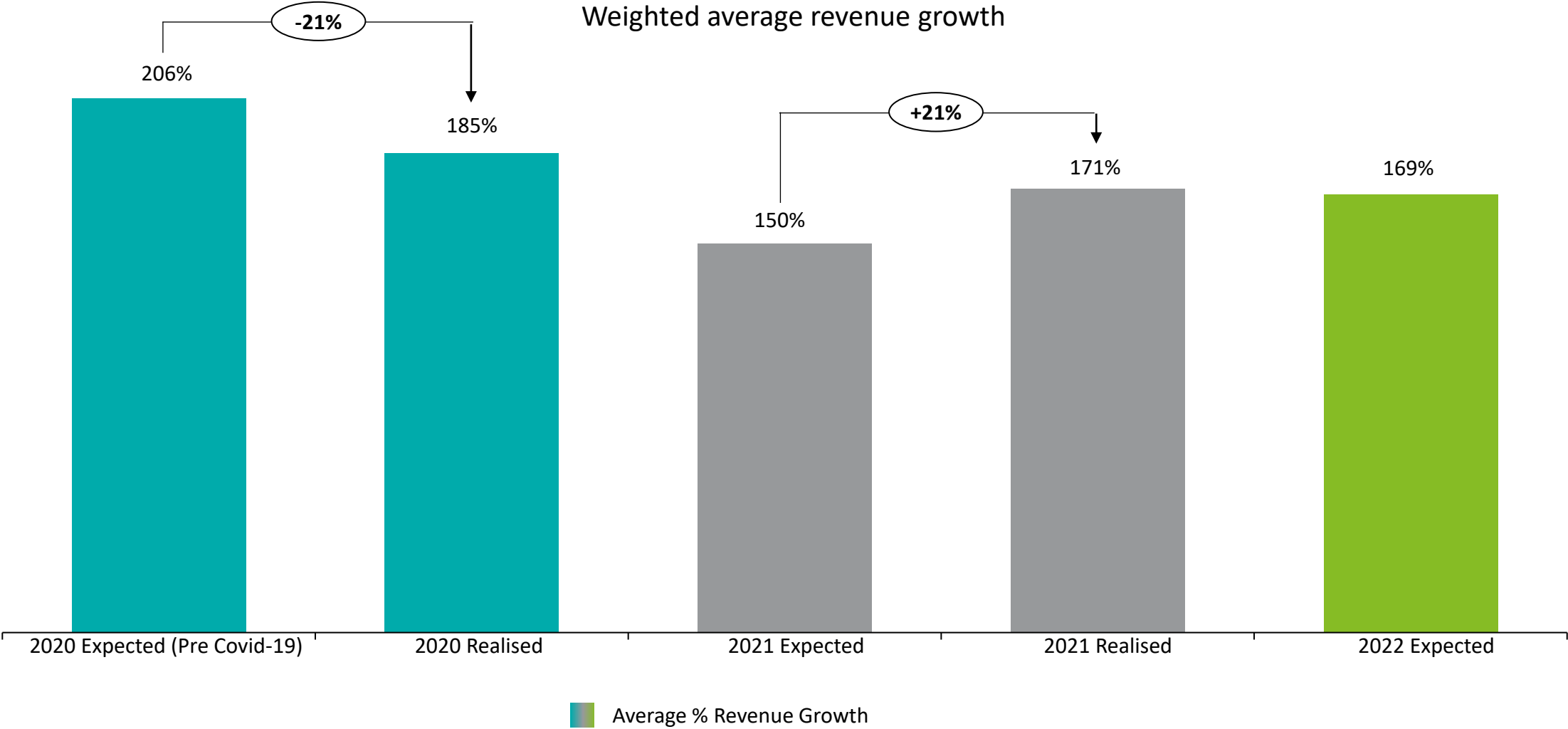
They expect their revenue growth to continue in 2022 with an average expected revenue growth of 169%.

Finding the right talent was the biggest challenge for FinTech scale-ups (however falling 4% compared to last year) and is followed by lower/delayed new business and customer signings

Q: Looking back, what were the biggest challenges to reach your growth ambition?

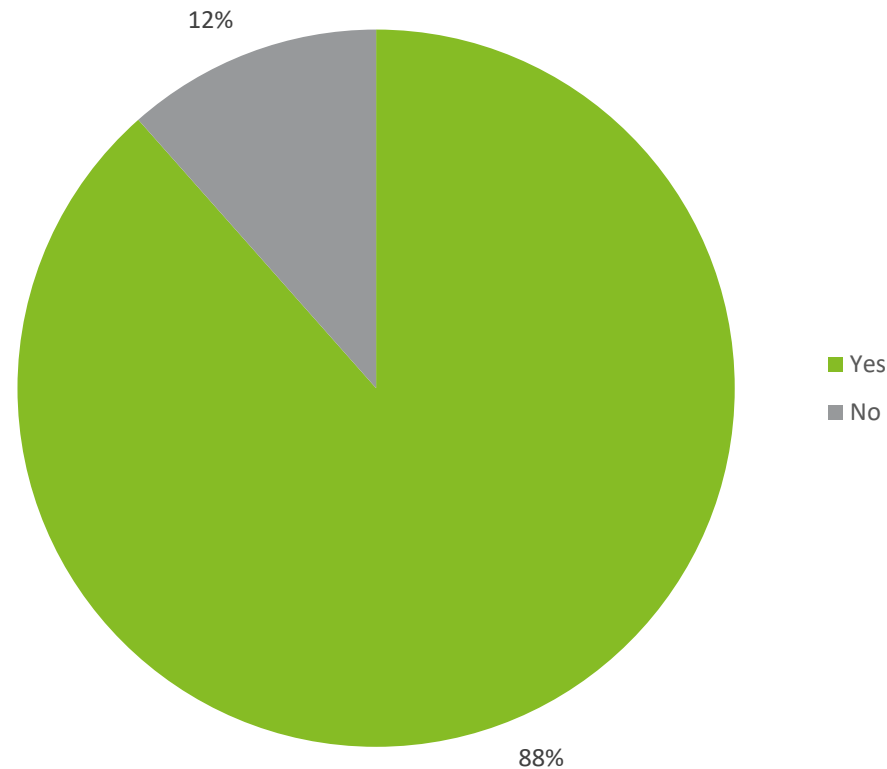


FinTech scale-ups managed to exceed their expected revenue growth in 2021 by 21% and expect to continue this growth in 2022

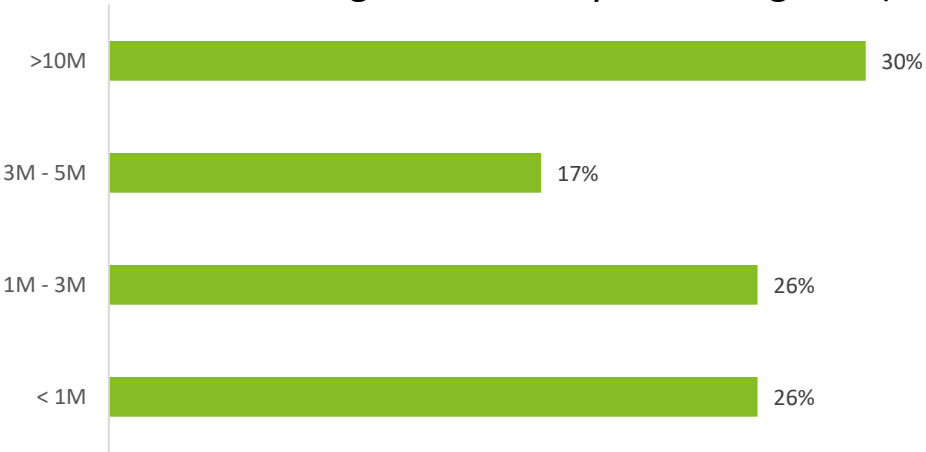


88% of FinTech scale-ups seek additional funding, with 30% of them looking for funding over 10 million euro. Yet 96% of them are confident that they will obtain the required funding

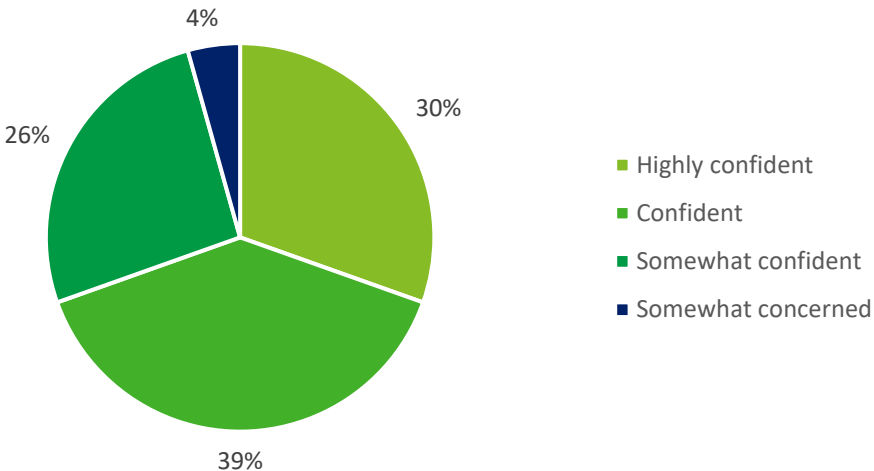
Q: Do you seek additional funding?



Q: What funding amount are you looking for? (in €)

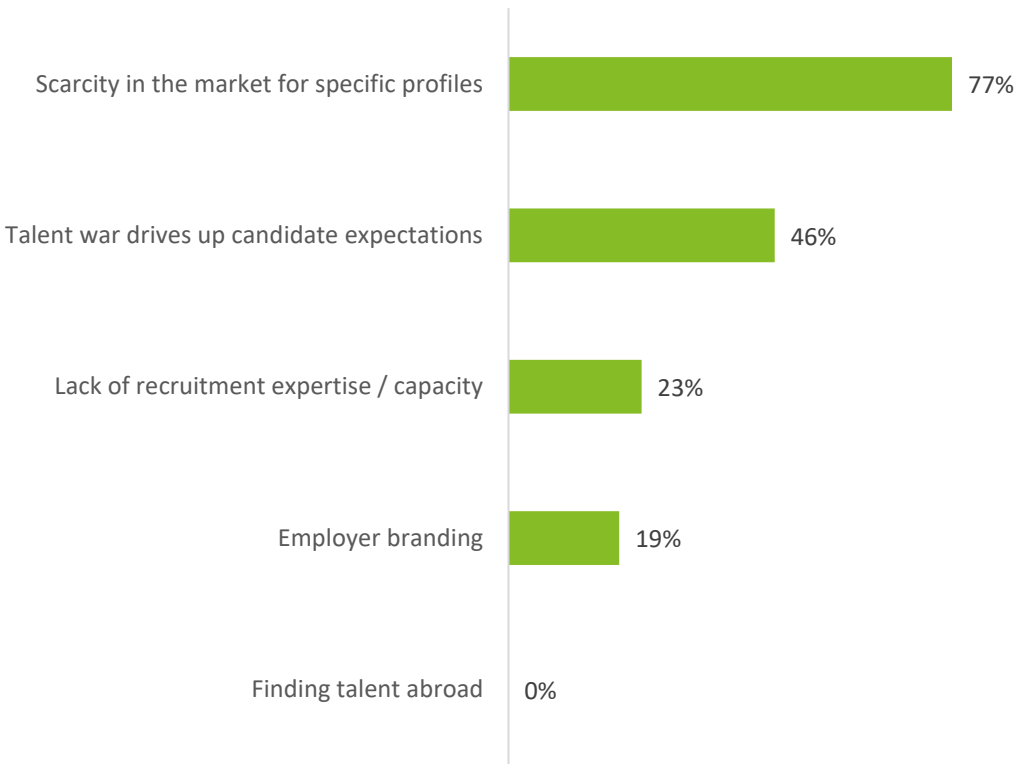


Confidence in obtaining the required funding

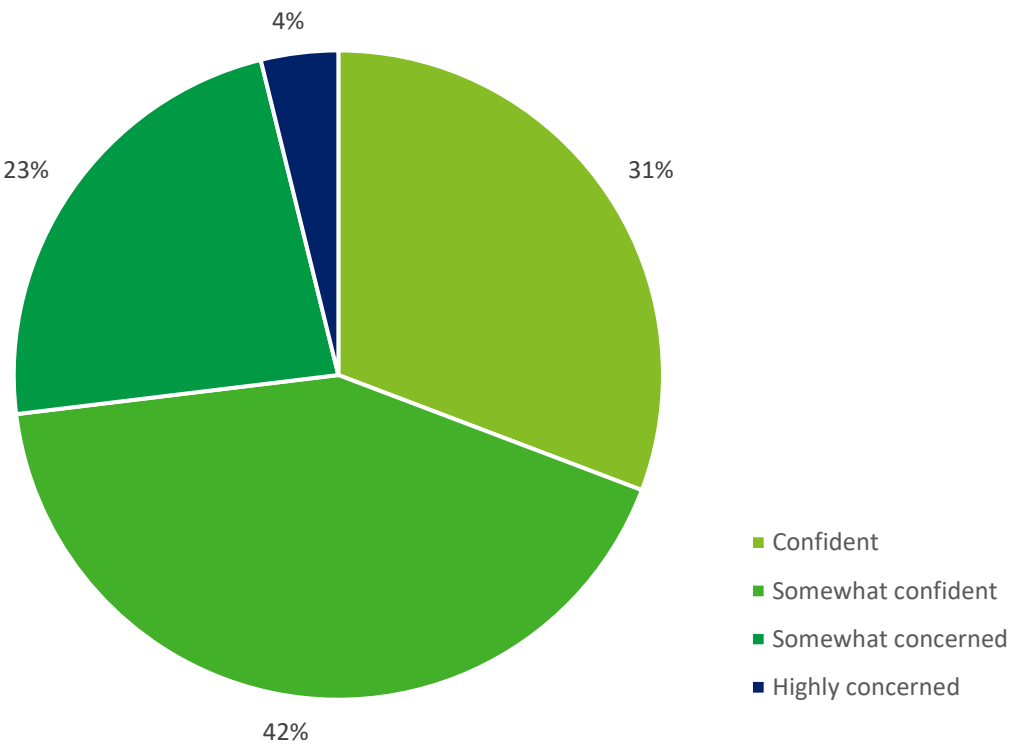


FinTech scale-ups see the scarcity in the market for specific profiles as their main hurdle in attracting and retaining talent, yet 96% of scale-ups is confident that they will find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,5

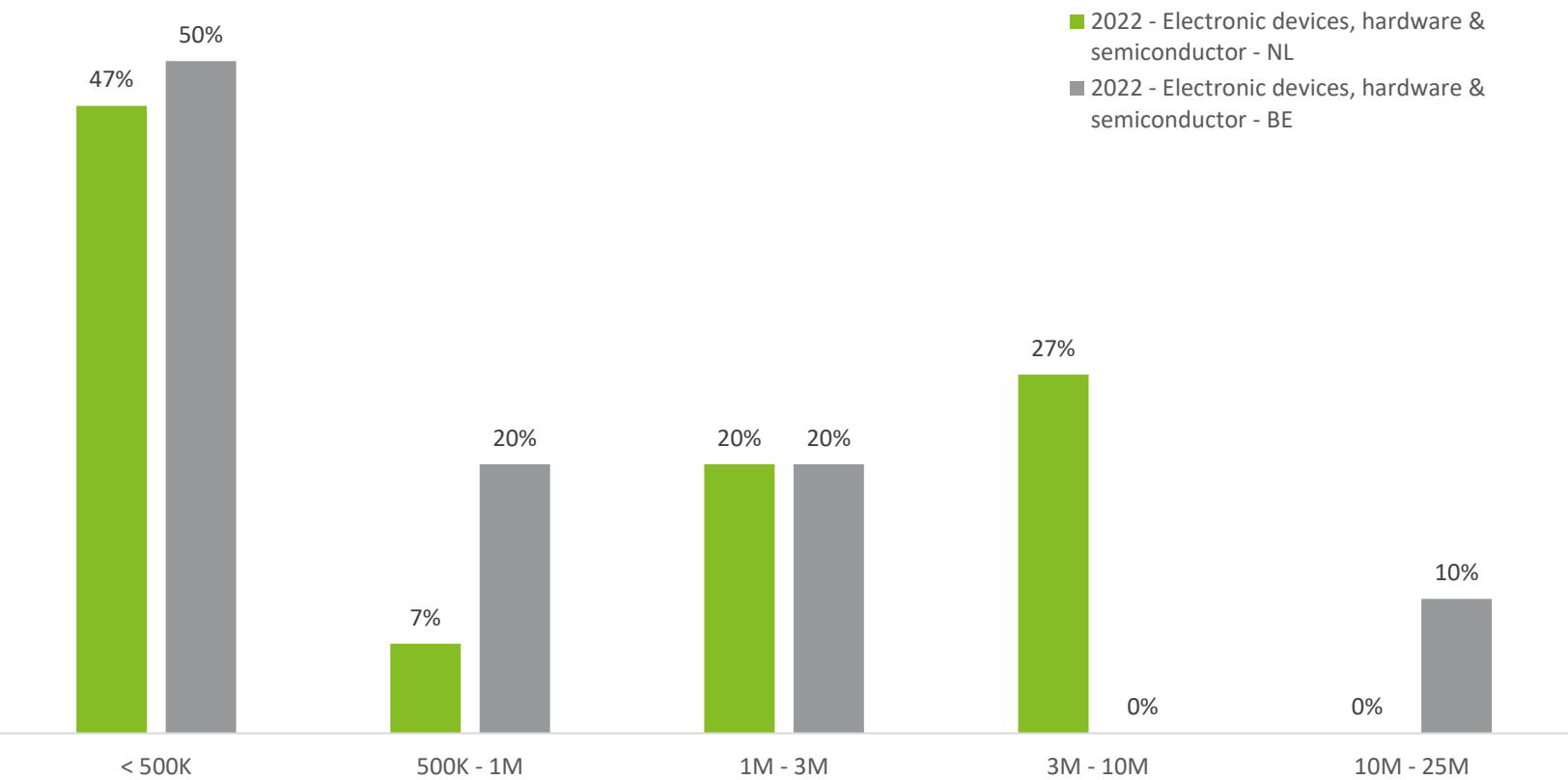
Detailed segments analysis

Electronic devices, hardware & semiconductors



25 Electronic devices, hardware & semiconductors scale-ups responded in this year's survey with 10 respondents from Belgium and 15 from the Netherlands

Percentage of respondents per revenue band



Detailed segments analysis Electronic devices, hardware & semiconductors



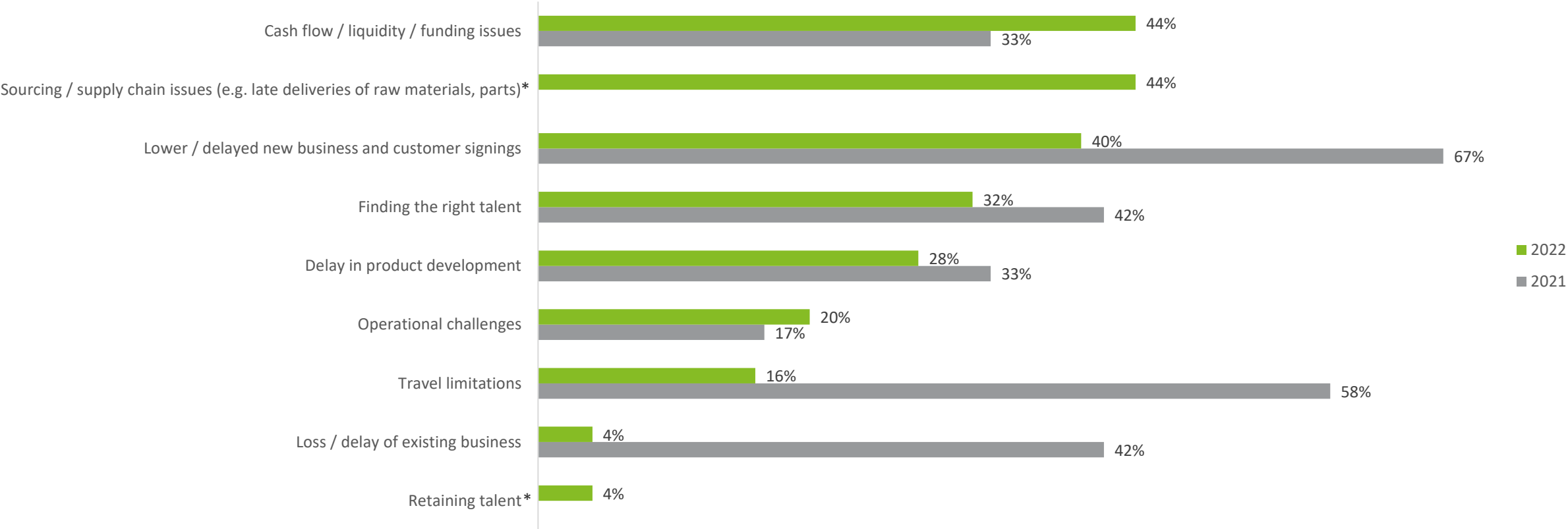
Electronic devices, hardware & semiconductors scale-ups expect the highest revenue growth in 2022 at 184%, compared with other segments.

In contrast with the other segments, finding the right talent only ranks 4th for Electronic devices, hardware & semiconductors scale-ups when asked about their biggest challenges in 2021.

Unlike other scale-ups, Electronic devices, hardware & semiconductors scale-ups list cash flow, liquidity and funding issues, and sourcing and supply chain issues as their biggest challenges



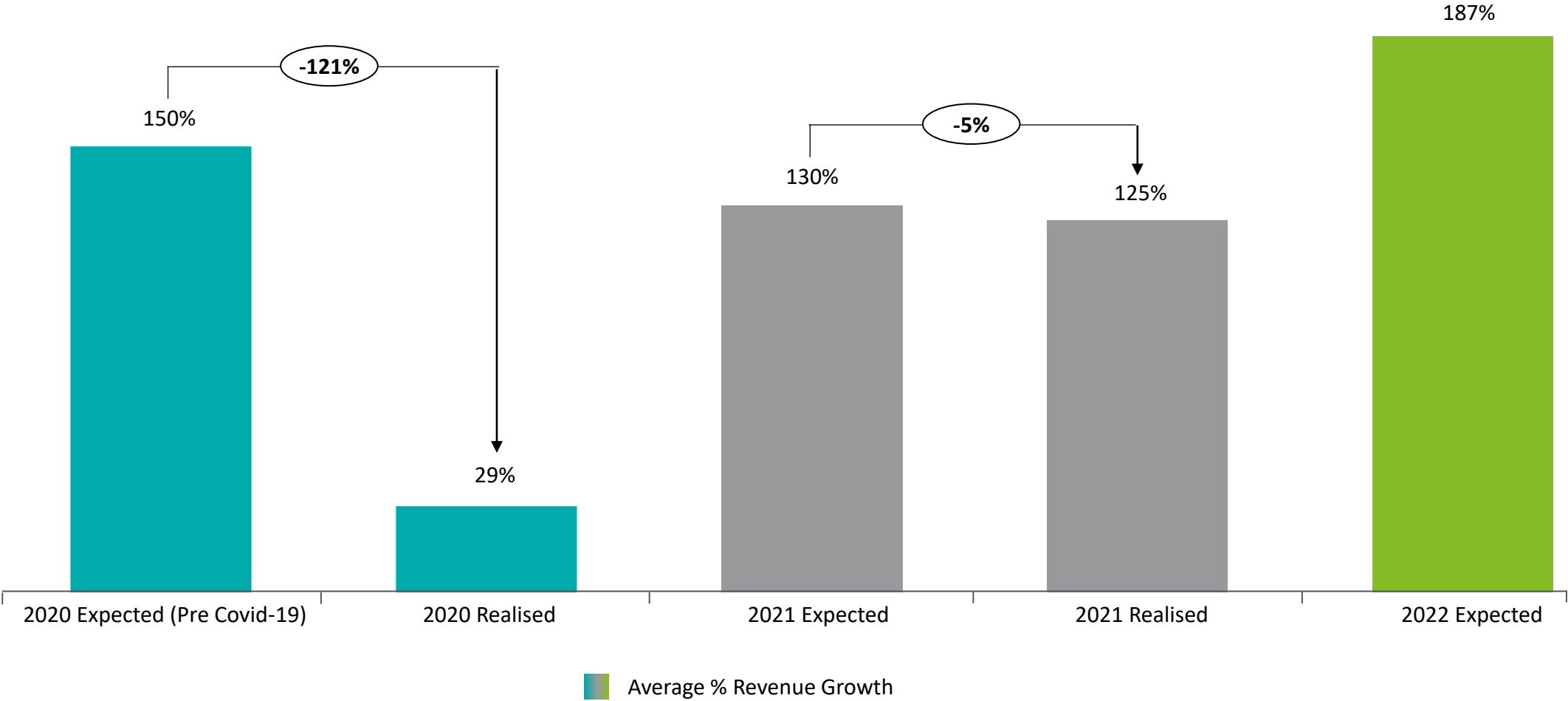
Q: Looking back, what were the biggest challenges to reach your growth ambition?



*Was not an option in the Deloitte Confidence Survey, March 2021

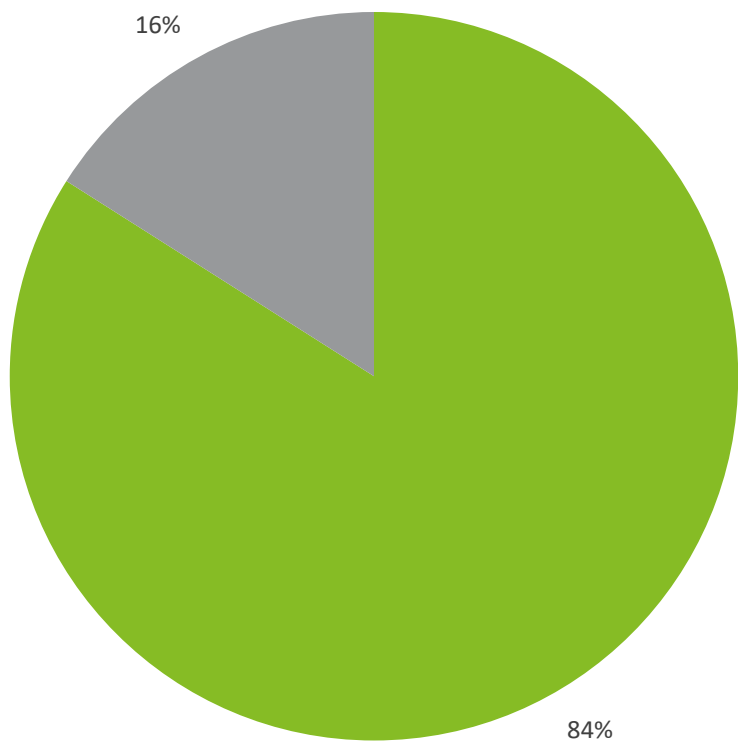
Electronic devices, hardware and semiconductor scale-ups expect their revenue growth to increase by 62% compared to their realised revenue growth in 2021

Weighted average revenue growth



84% of Electronic devices, hardware & semiconductors scale-ups seek additional funding, with almost half of them (48%) seeking funding of more than 5 million euro

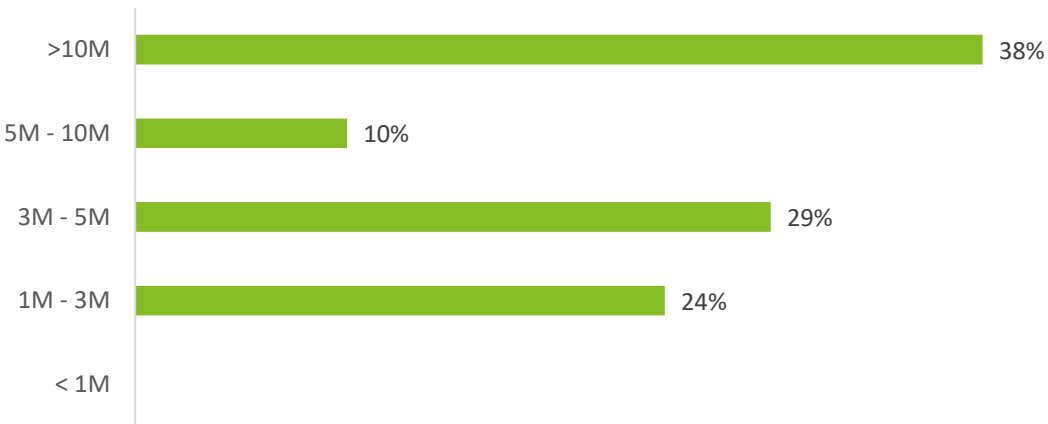
Q: Do you seek additional funding?



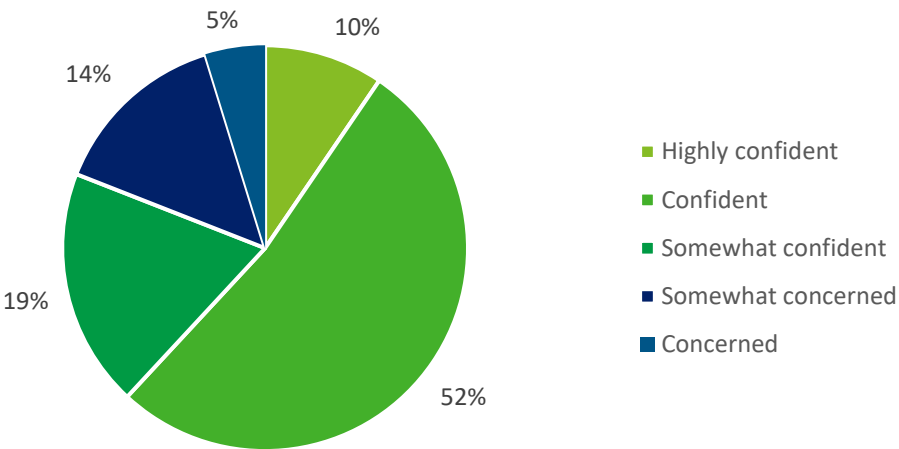
■ Yes
■ No



Q: What funding amount are you looking for? (in €)

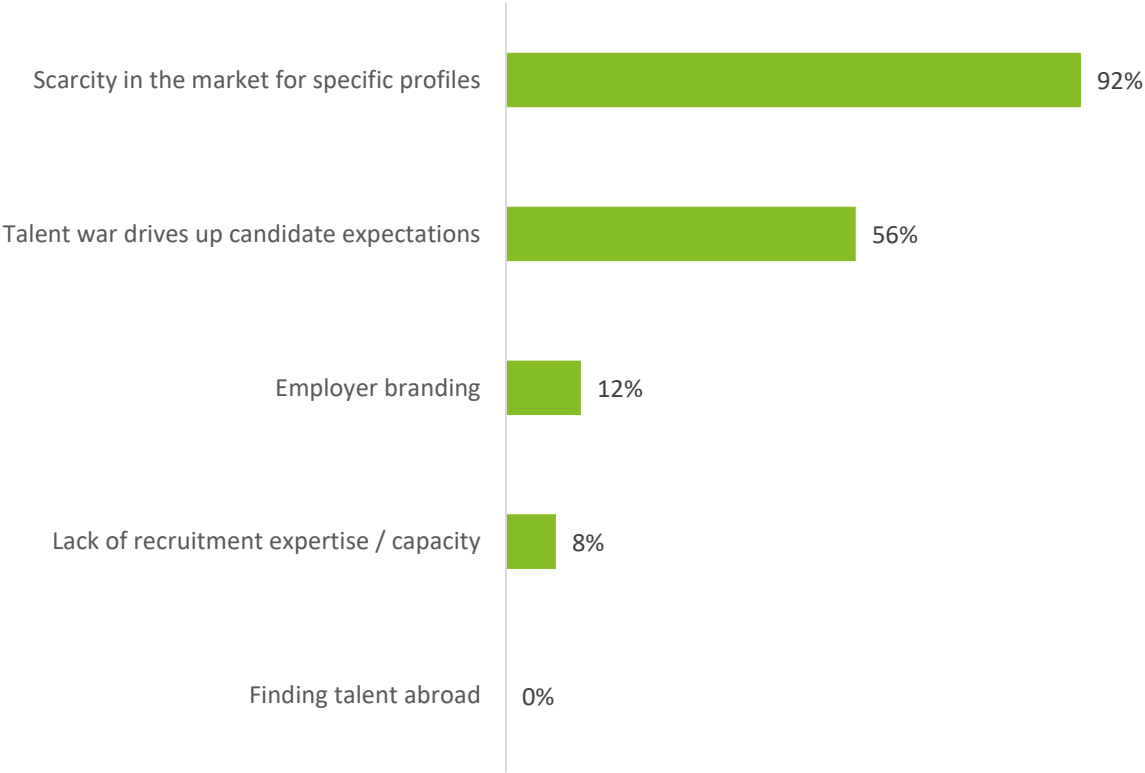


Confidence in obtaining the required funding

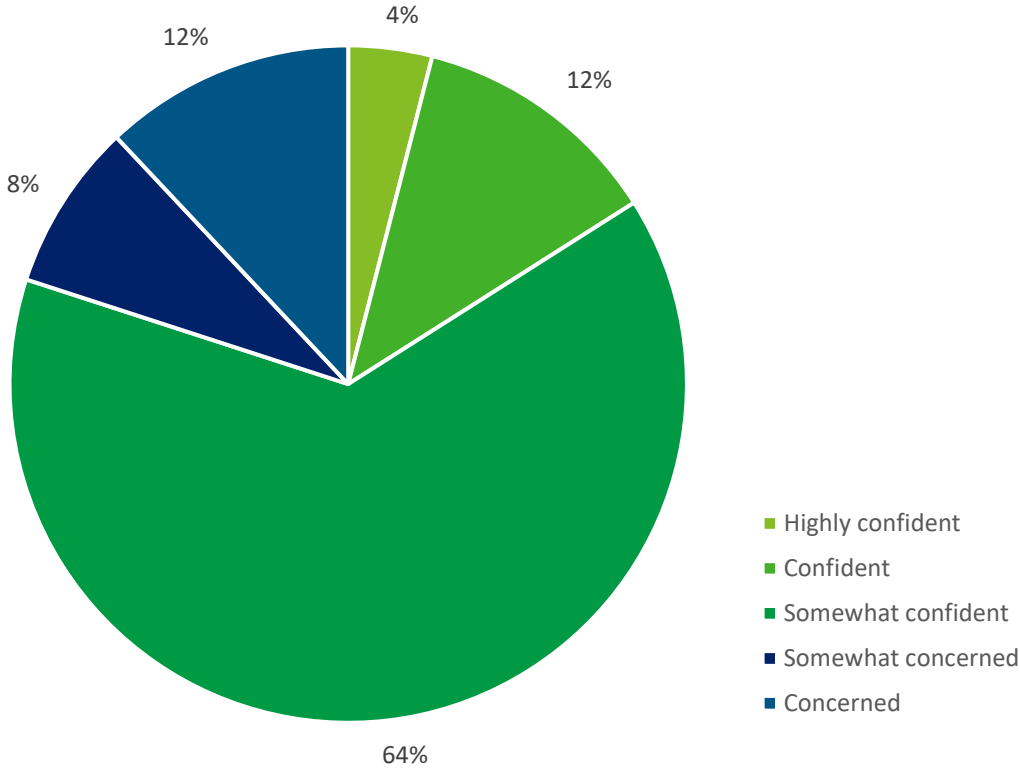


Electronic devices, hardware & semiconductors scale-ups name scarcity in the market for specific profiles as their main hurdle, followed by the ongoing fight for talent, yet 80% of scale-ups is confident that they will find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,2

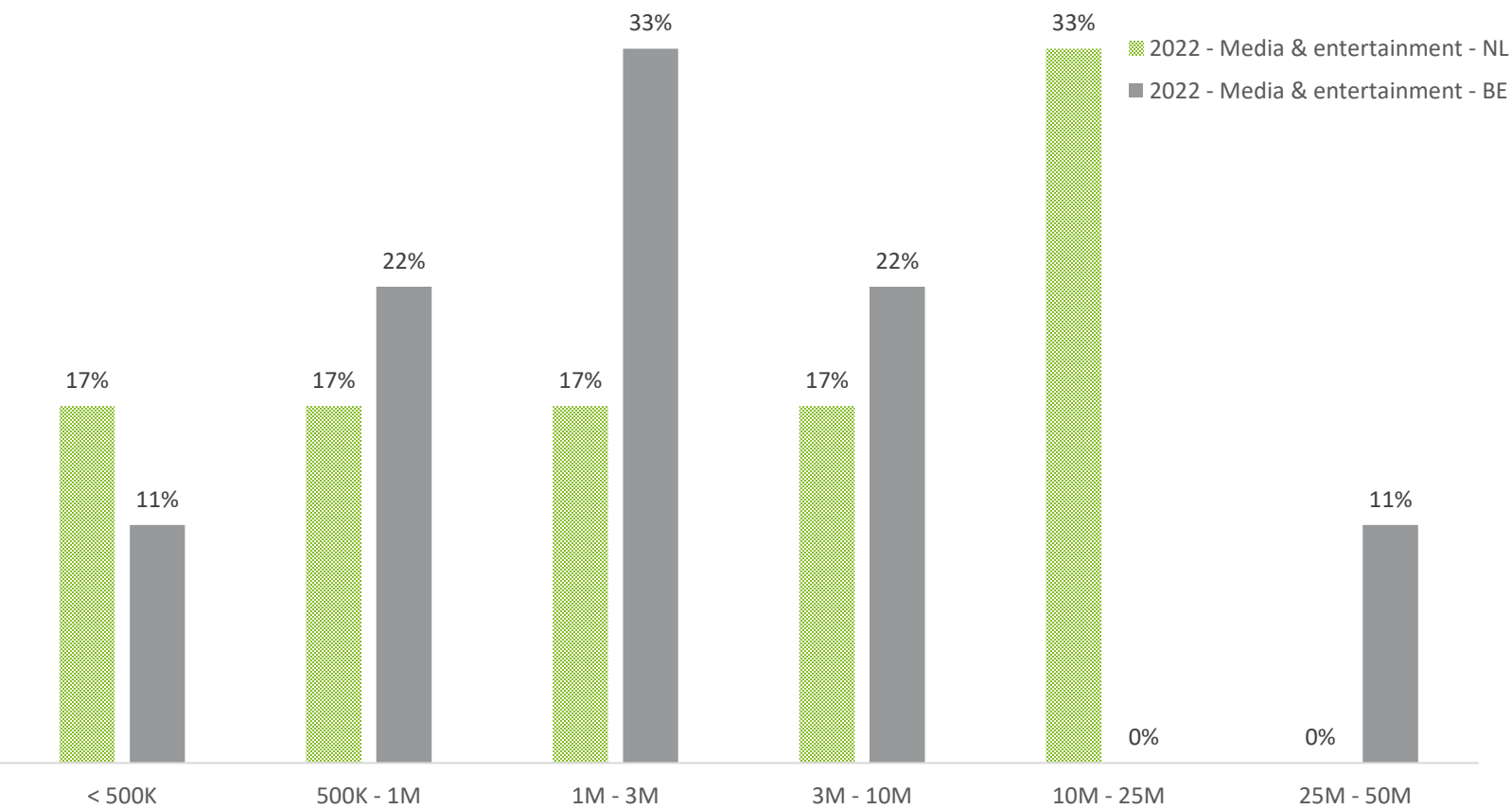
Detailed segments analysis

Media & entertainment



24 Media & entertainment scale-ups responded in this year's survey with 18 respondents from Belgium and 6 from the Netherlands

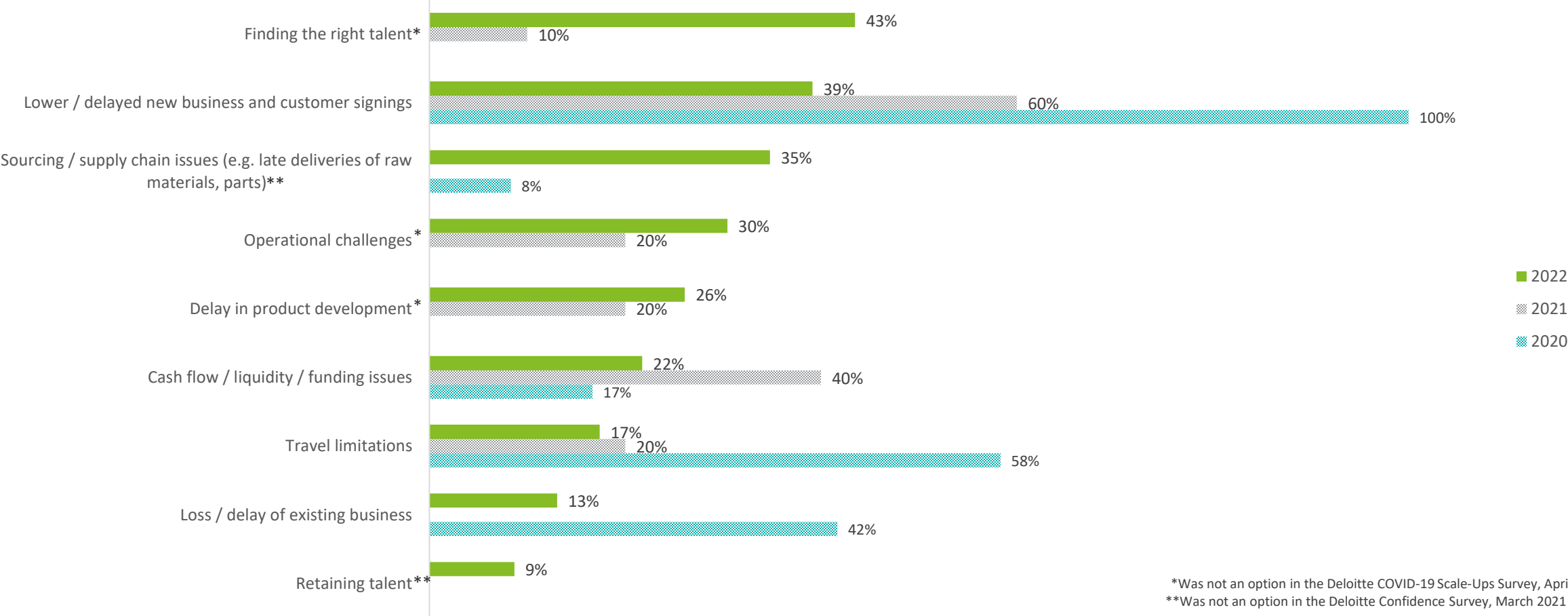
Percentage of respondents per revenue band



Media & entertainment reported a significant dip in revenue growth in 2020, compared to what they had expected. This could in great part be attributed to the Covid-19 pandemic. Nevertheless scale-ups are again expecting to realise an exponential revenue growth of 120%.

Media & entertainment scale-ups identified that the 3 biggest challenges were finding the right talent, lower and delayed new business and customer signings, and sourcing and supply chain issues

Q: Looking back, what were the biggest challenges to reach your growth ambition?

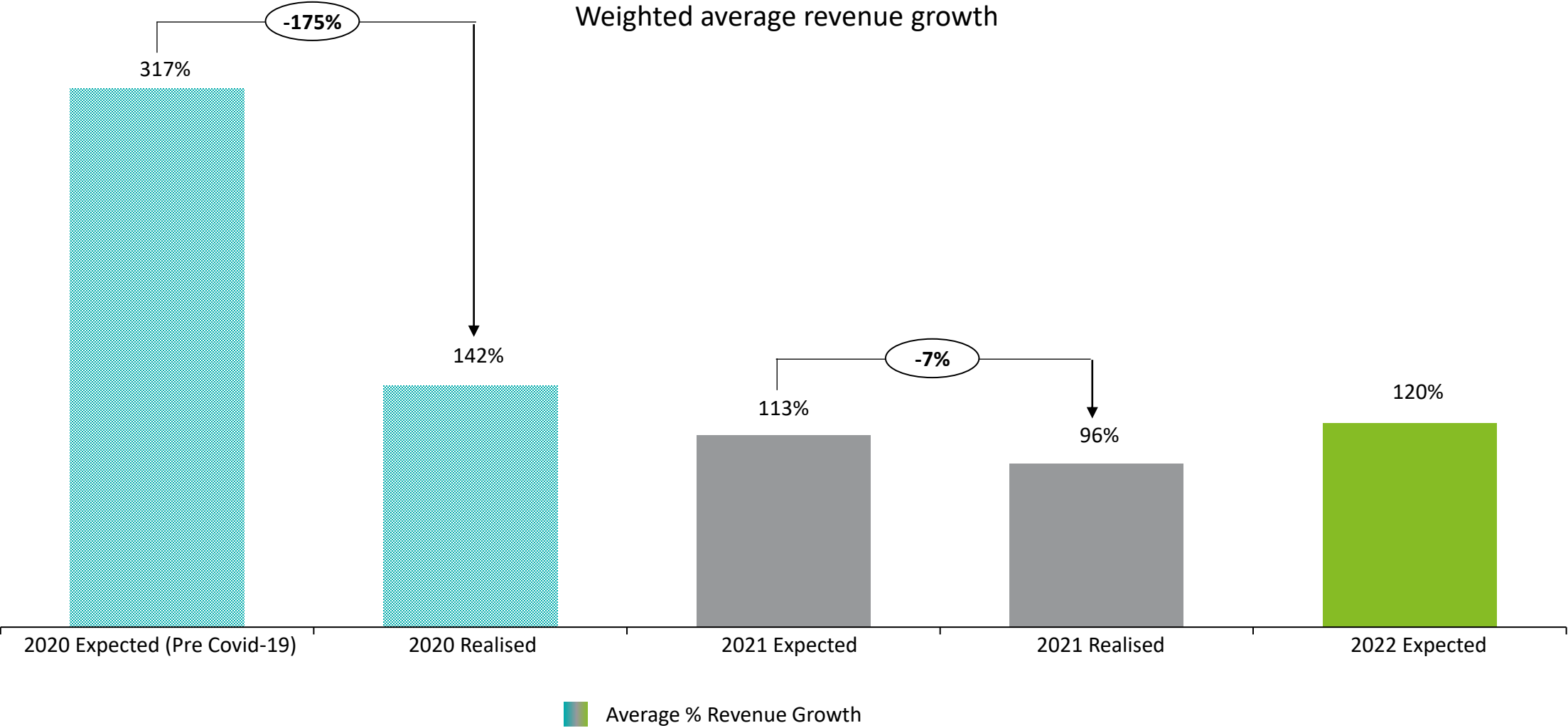


*Was not an option in the Deloitte COVID-19 Scale-Ups Survey, April 2020
**Was not an option in the Deloitte Confidence Survey, March 2021

Bars are shaded if fewer than 10 respondents

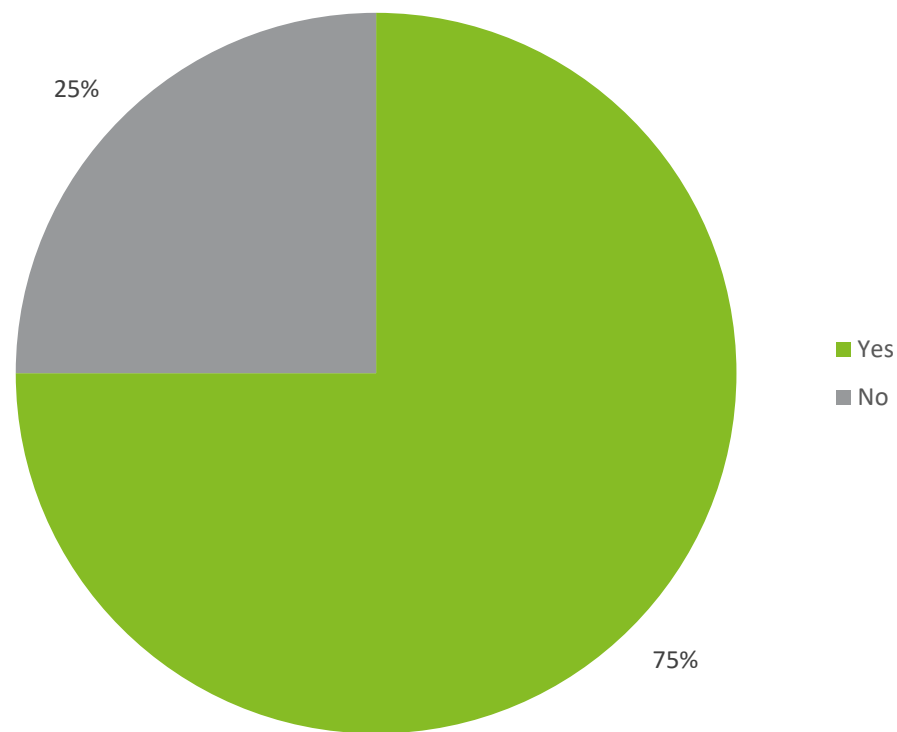
Source: Deloitte COVID-19 Scale-ups Survey, April 2020. N = 6
Source: Deloitte Confidence Survey, March 2021, Question 10. N = 5
Source: Deloitte Confidence Survey, March 2022, Question 2.5. N = 24

After a significant drop in revenue growth to what they expected in 2020, Media & entertainment scale-ups expect to regain an exponential growth in 2022



75% of Media & entertainment scale-ups seek additional funding, with 65% of them looking for funding of less than 3 million. All scale-ups are confident that they will find their required funding

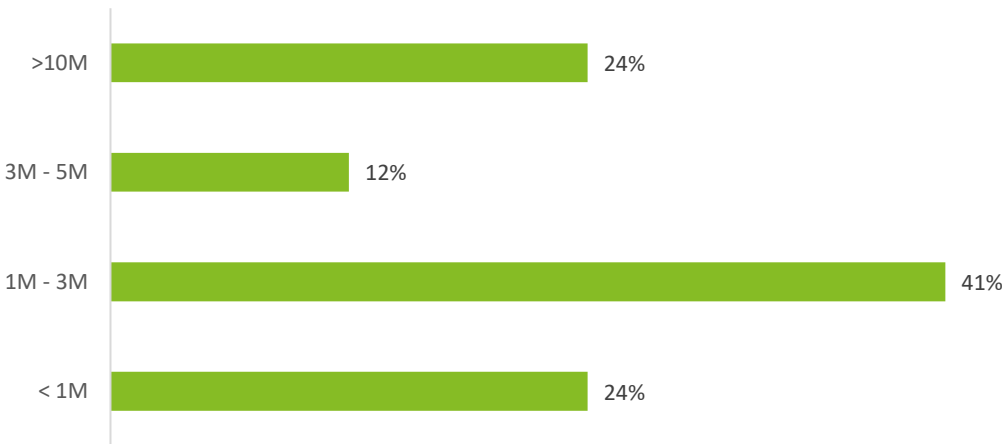
Q: Do you seek additional funding?



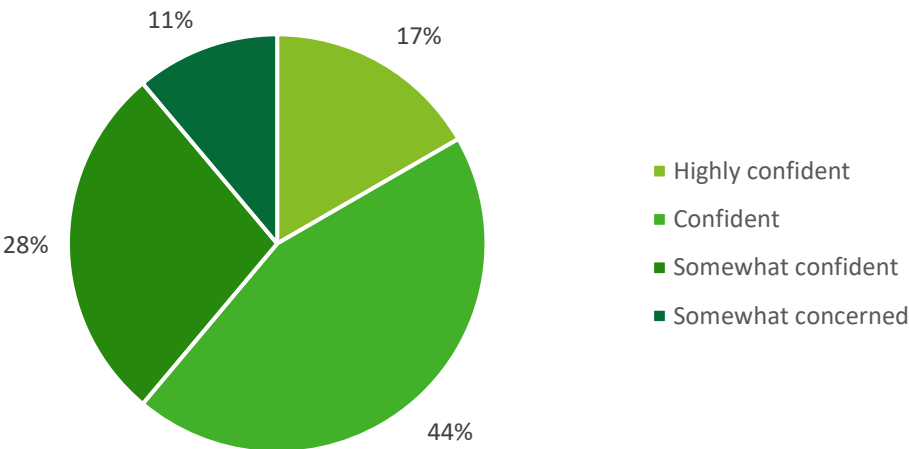
■ Yes
■ No



Q: What funding amount are you looking for? (in €)



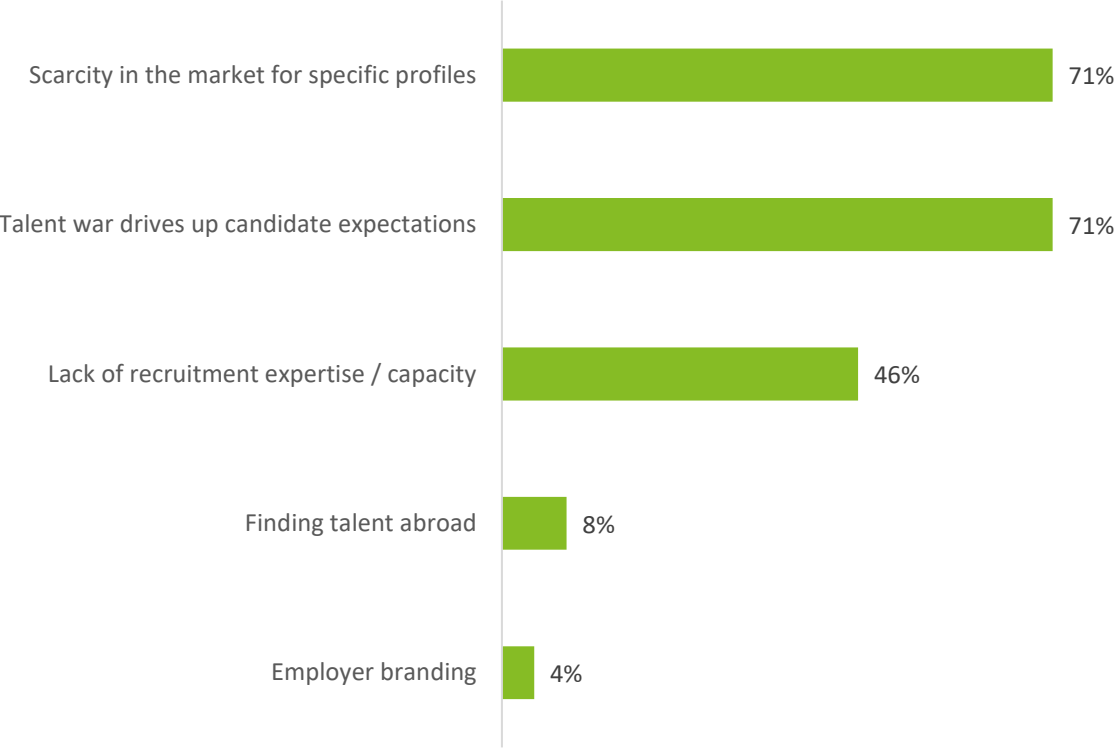
Confidence in obtaining the required funding



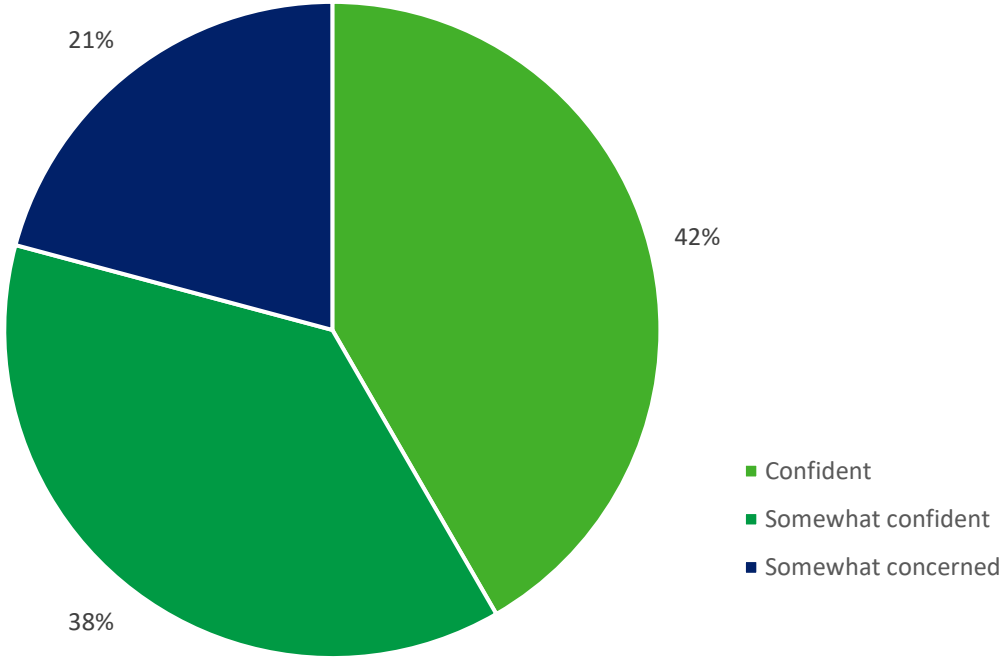
■ Highly confident
■ Confident
■ Somewhat confident
■ Somewhat concerned

Media & entertainment scale-ups see the scarcity in the market for specific profiles and the fight for talent as their main hurdles, with 79% of scale-ups at least somewhat confident that they will find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent



Confidence Score:

8,5

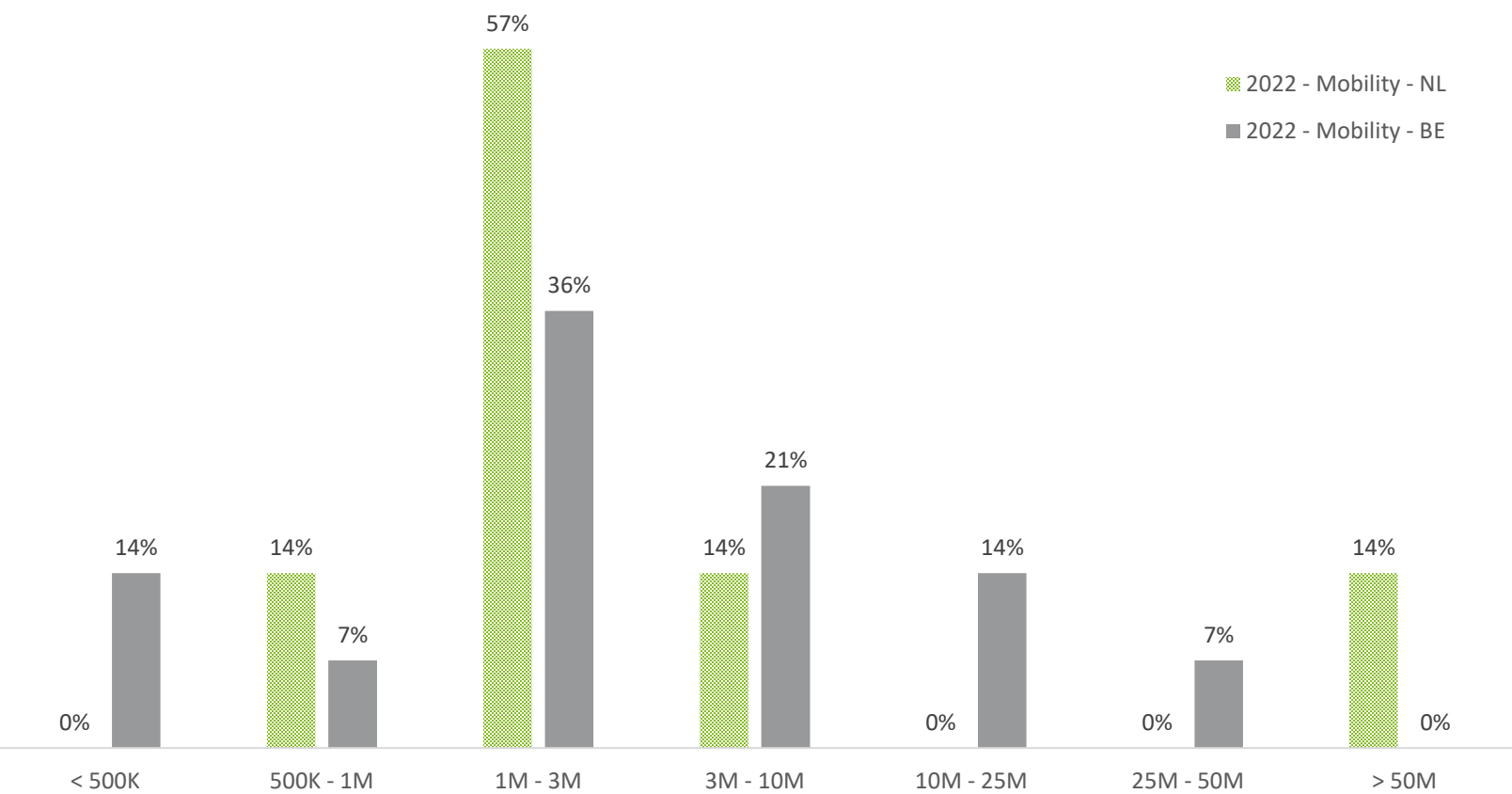
Detailed segments analysis


Mobility



23 Mobility scale-ups responded in this year's survey with 15 respondents from Belgium and 7 from the Netherlands


Percentage of respondents per revenue band





Detailed segments analysis

Mobility

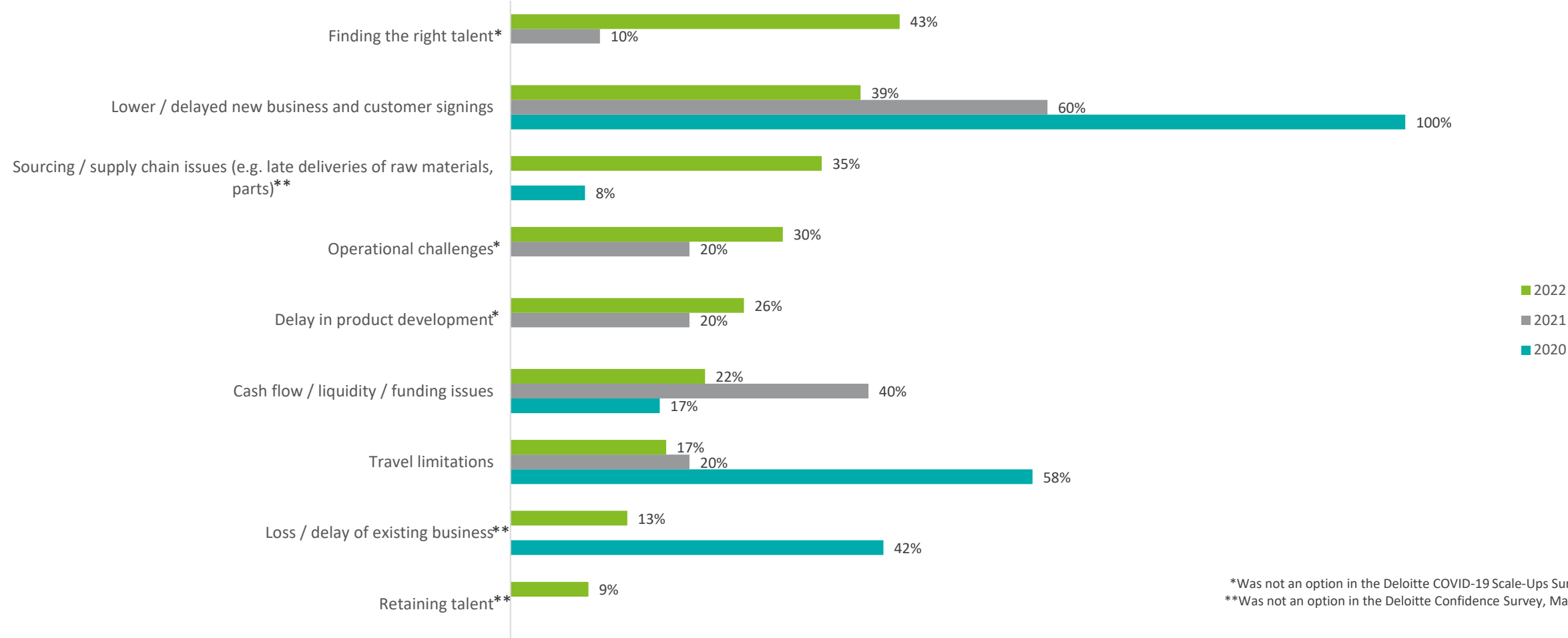


With a confidence score of 8.5, Mobility scale-ups are on average slightly more confident than other scale-ups.

Their confidence is particularly strong when it comes to obtaining their required funding and finding the right talent.

For Mobility scale-ups, the 3 biggest challenges were finding the right talent, lower and delayed new business and customer signings, and sourcing and supply chain issues

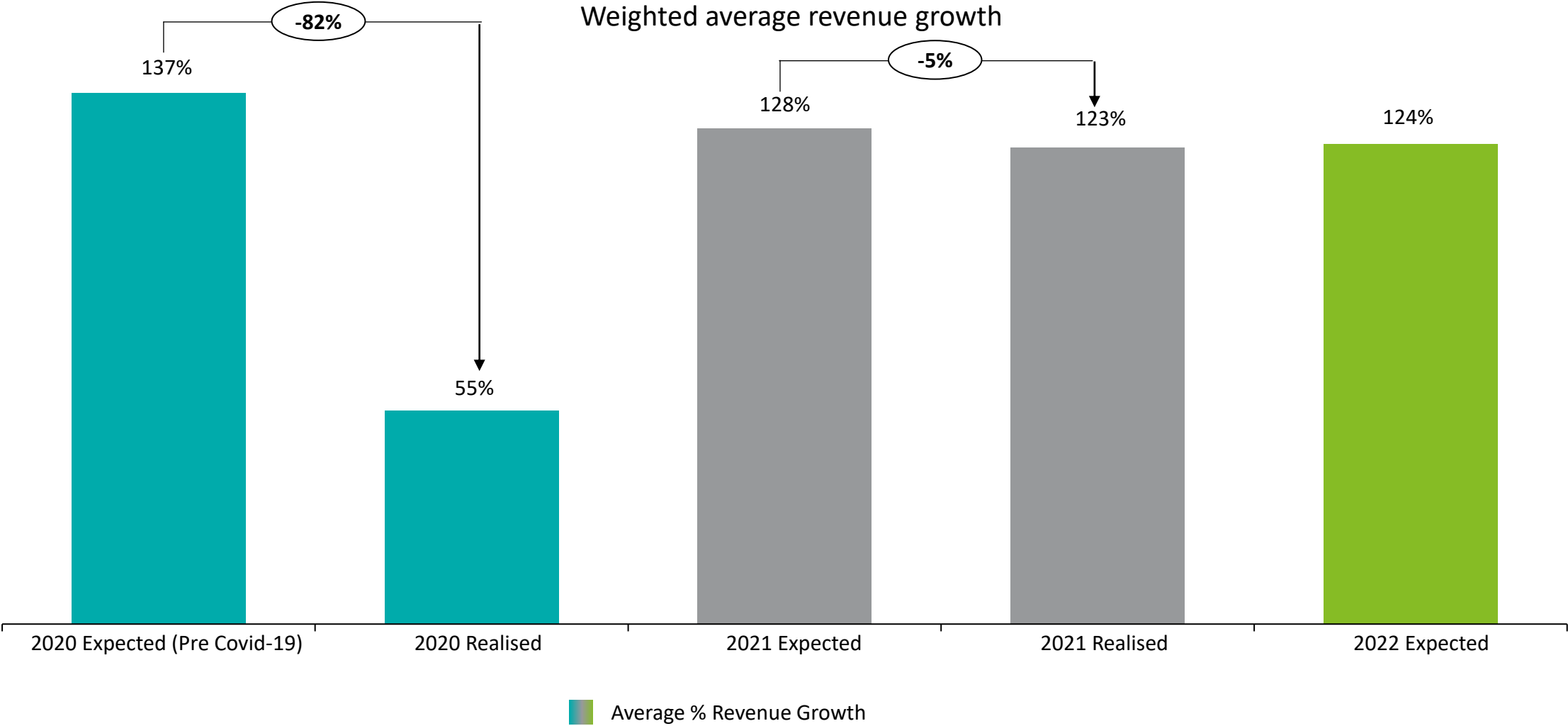
Q: Looking back, what were the biggest challenges to reach your growth ambition?



*Was not an option in the Deloitte COVID-19 Scale-Ups Survey, April 2020

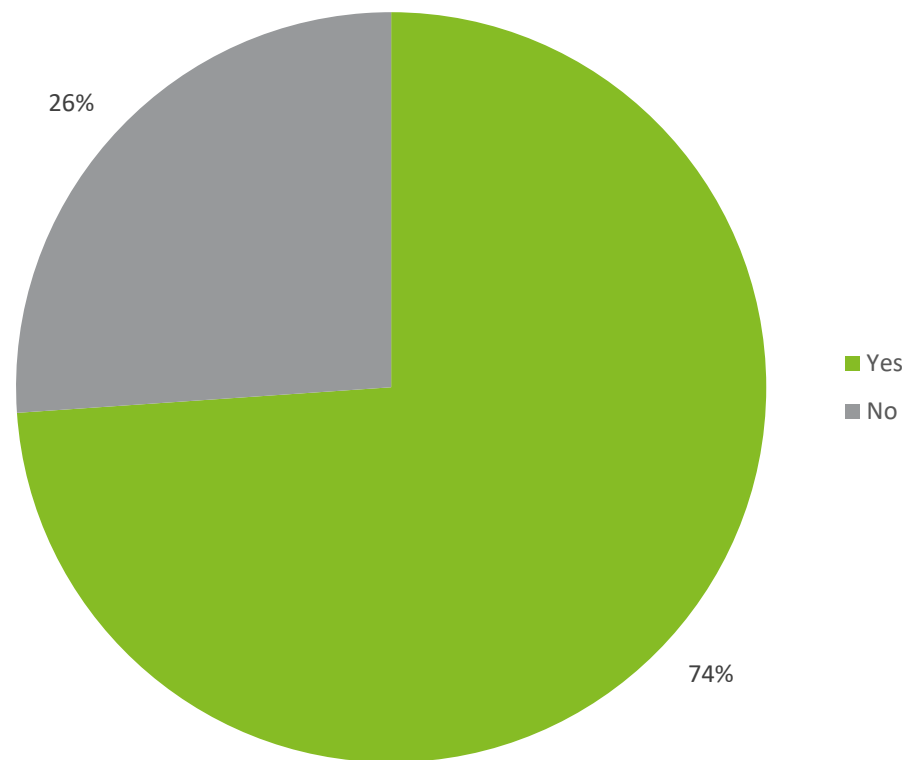
**Was not an option in the Deloitte Confidence Survey, March 2021

Mobility scale-ups expect to continue their exponential growth as they were able to accomplish in 2021

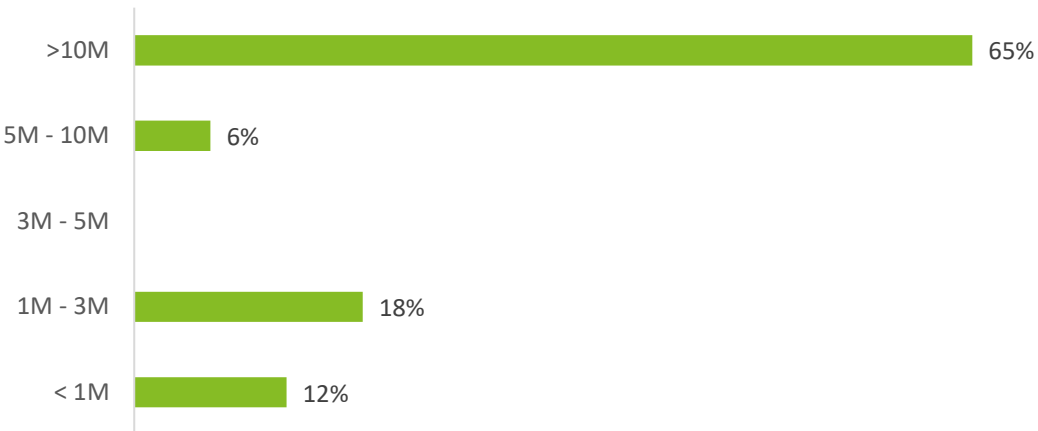


74% of Mobility scale-ups seek additional funding, with the majority (65%) looking for funding of more than 10 million euro. Confidence however is high, with only 6% being somewhat concerned

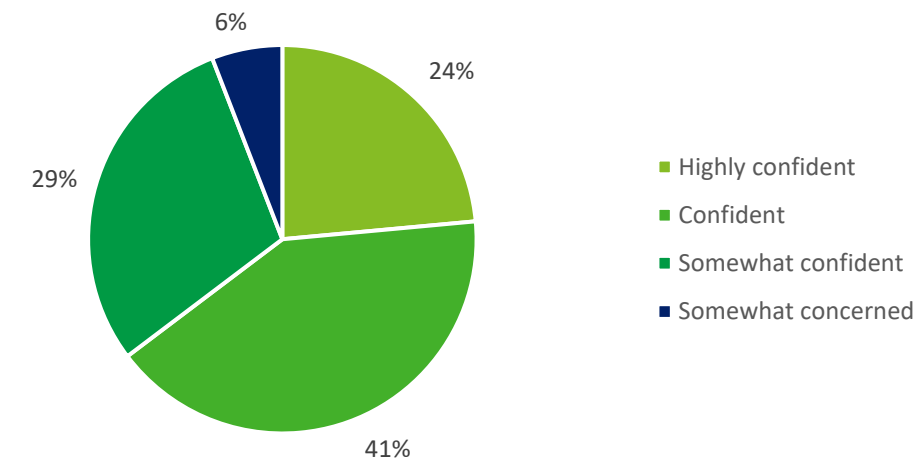
Q: Do you seek additional funding?



Q: What funding amount are you looking for? (in €)

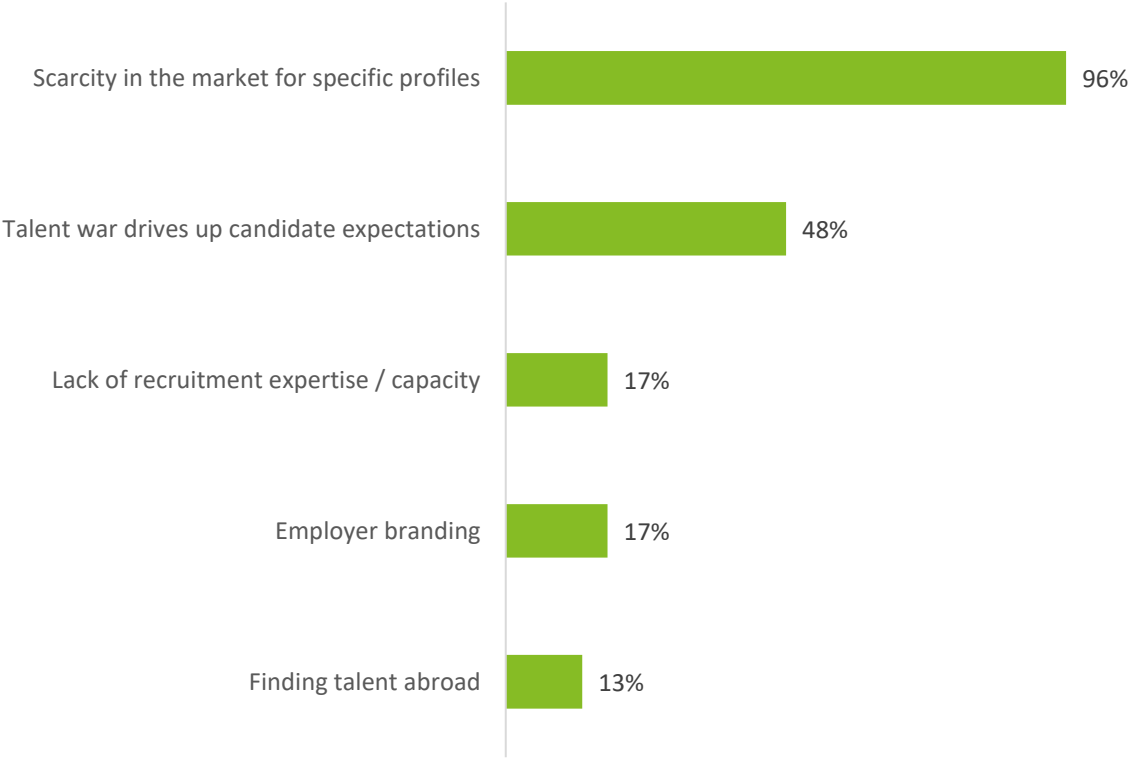


Confidence in obtaining the required funding



Almost all Mobility scale-ups (96%) identify scarcity in the market for specific profiles as their main hurdle, nevertheless 70% of scale-ups is confident that they will find the right talent

Main hurdles in attracting and retaining talent



Confidence in finding the right talent

