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**PLUGANDPLAY**

**trendforum  
retail** 

**The ultimate  
innovation platform.**





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## Your presenter



**Bob Rode**

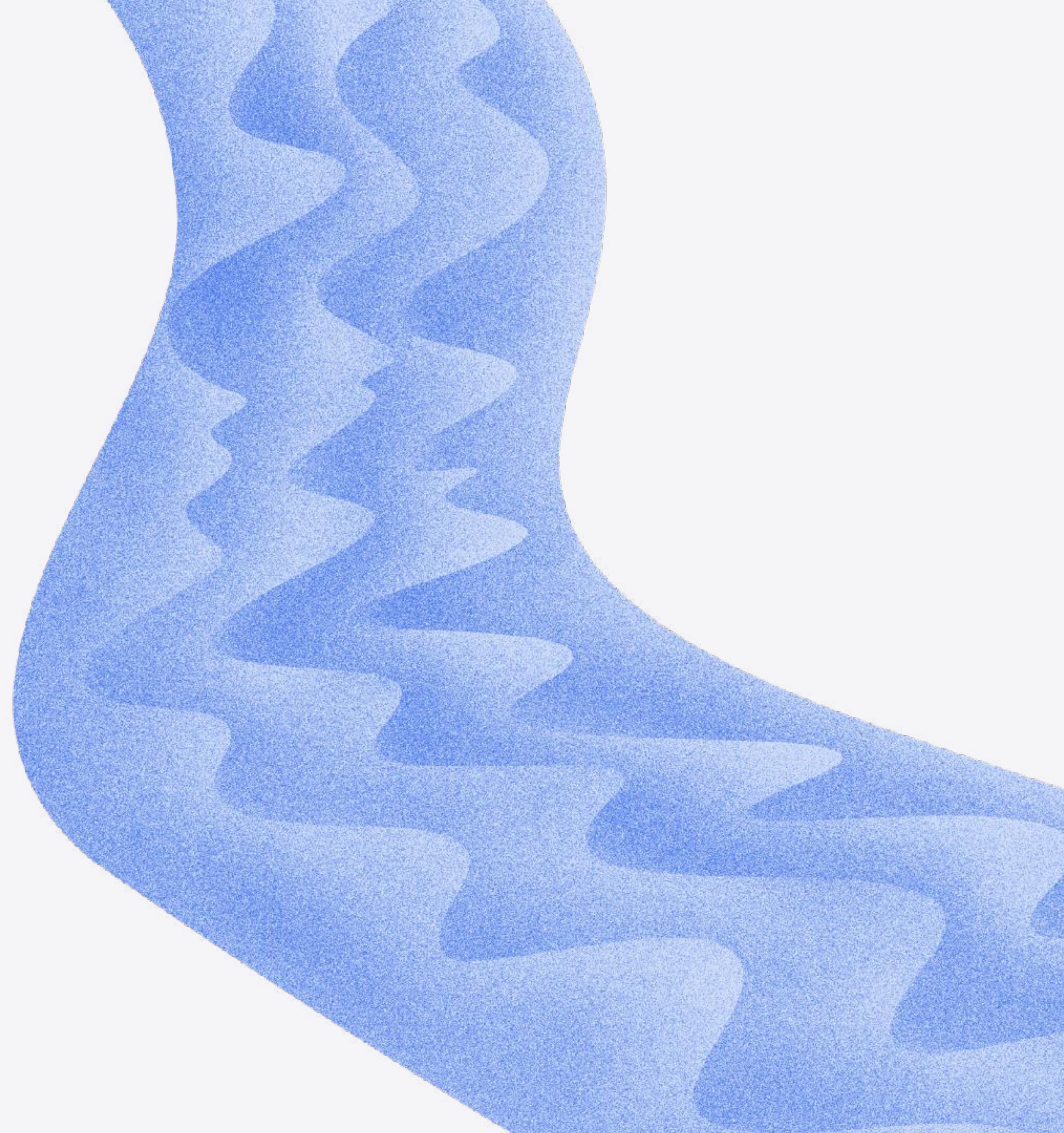
Associate at Plug and Play Ventures



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**PLUGANDPLAY**

# Plug and Play Overview





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## Our innovation platform

### VENTURE CAPITAL

We invest in **over 200** companies worldwide every year and co-invest with **hundreds of VCs**

### CORPORATE INNOVATION

We supercharge the innovation of **over 400** major corporations from every continent



## Our Beginnings: The “Lucky Building”



Google

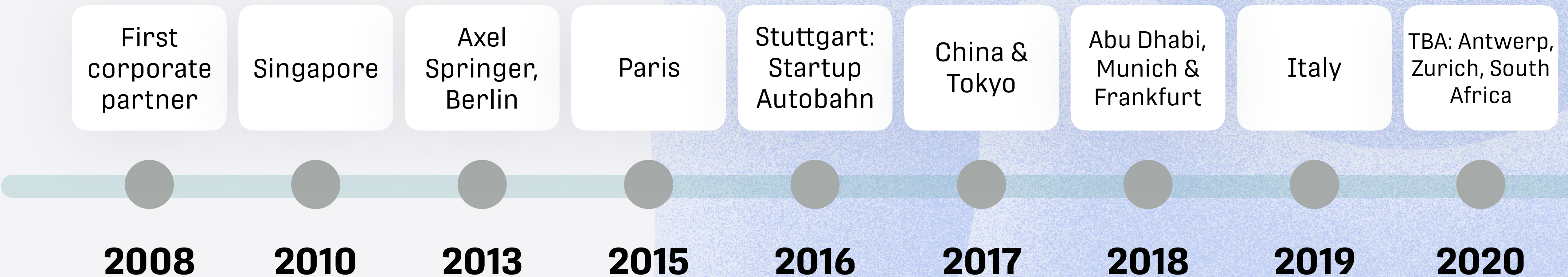
logitech

PayPal

DANGER



## The world's most active VC and open innovation platform





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## Where we stand today

ACTIVE PORTFOLIO  
COMPANIES

**1000+**

CORPORATE PARTNERS  
IN 19 INDUSTRIES

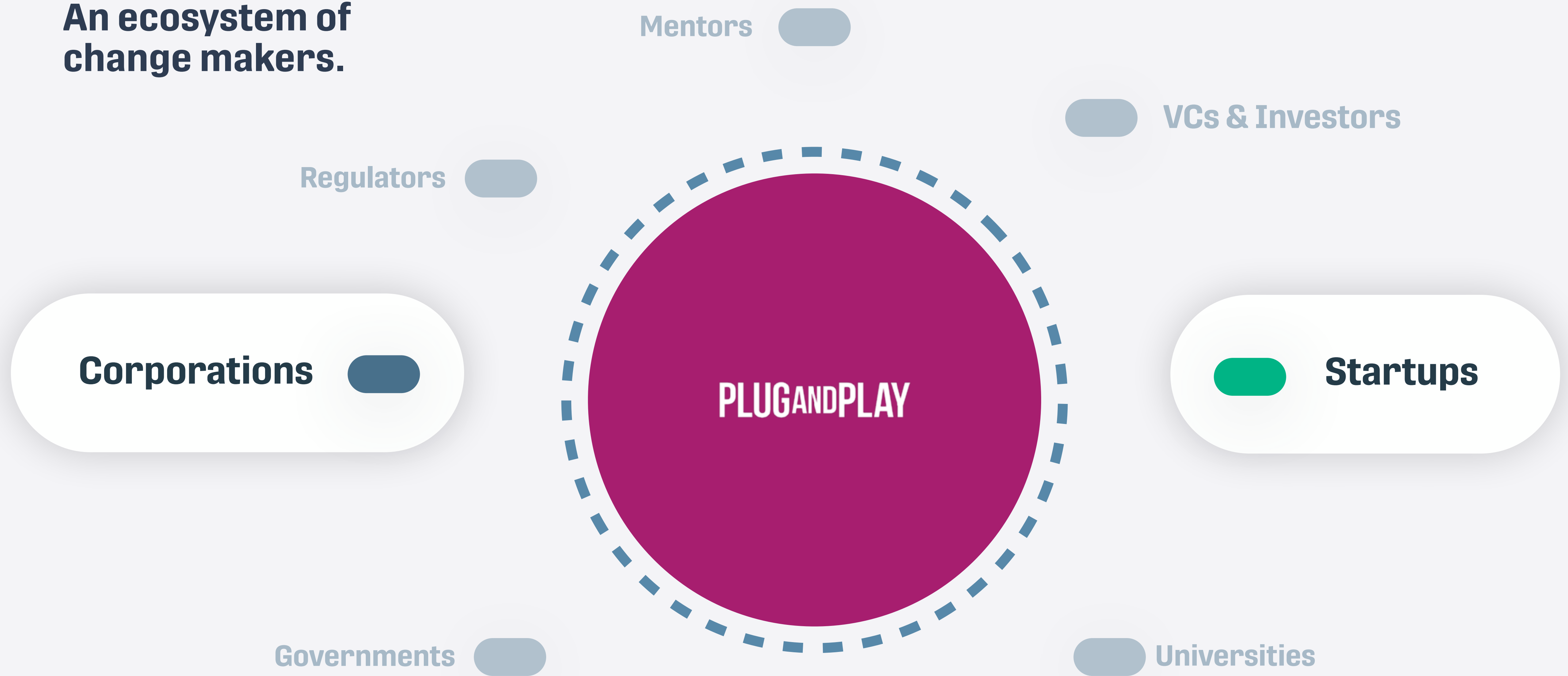
**450+**

EMPLOYEES IN 33  
LOCATIONS

**500+**



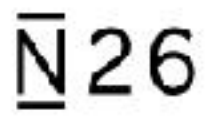

















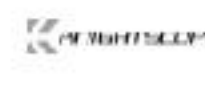






























































**An ecosystem of  
change makers.**





Our portfolio includes 9 unicorns to date including German N26

|         | ACTIVE POSITIONS   | EXITS   |
|---------|--|---|
| \$1B+   |       |        |
| \$100M+ |       <br>      <br>      <br>     |   <br>  <br>  <br>   |
| \$100M  |          <br>         <br>          |  <br> <br>    |

Highlight

A line up of Unicorns and Soonicorns: Honey was our latest big exit (\$4B)



## Programs



**Animal Health**

NEW



**Agtech**

NEW



**COVID-19**

NEW



**Sustainability**

NEW



**Brand & Retail**



**Media & Ad**



**Fintech**



**Food**



**Energy**



**Enterprise Tech**



**Health**



**IoT**



**Insurtech**



**Mobility**



**New Materials**



**Real Estate**



**Supply Chain**



**Smart Cities**



**Travel**



## Our efforts in Germany

### Munich



Health



Insurtech



Retail



### Frankfurt



Fintech



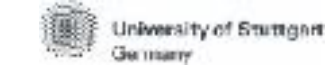
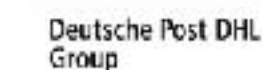
TechQuartier



### Stuttgart



STARTUPAUTOBAHN  
powered by PLUGANDPLAY



### Hamburg



Supply Chain





## Brand & Retail is at the core of our activities: 70+ Partners

Walmart

MONCLER

breuninger

SCHWARZ

amazon moments



Mercedes-Benz



L'ORÉAL  
PARIS



X5RETAILGROUP

KERING

KOHL'S

TJX  
THE TJX COMPANIES, INC.



Lagardère

LACOSTE



ESTÉE LAUDER

RICHEMONT



MediaMarktSaturn  
Retail Group





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**PLUGANDPLAY**

# How can corporate partners engage?





## How corporate partners engage with us



### Innovation Outlook

Portfolio Days

Innovation Days

Corporate innovation  
best practices  
seminars &  
roundtables

Exclusive themed pitch  
events ("Deep Dives")



### Pilots & Investments

- Dealflows
- Program
- Investment Opportunities area

-> Global sourcing and  
(virtual) meetings will  
be organized by Plug  
and Play for respected  
Business Units



### Future Trends

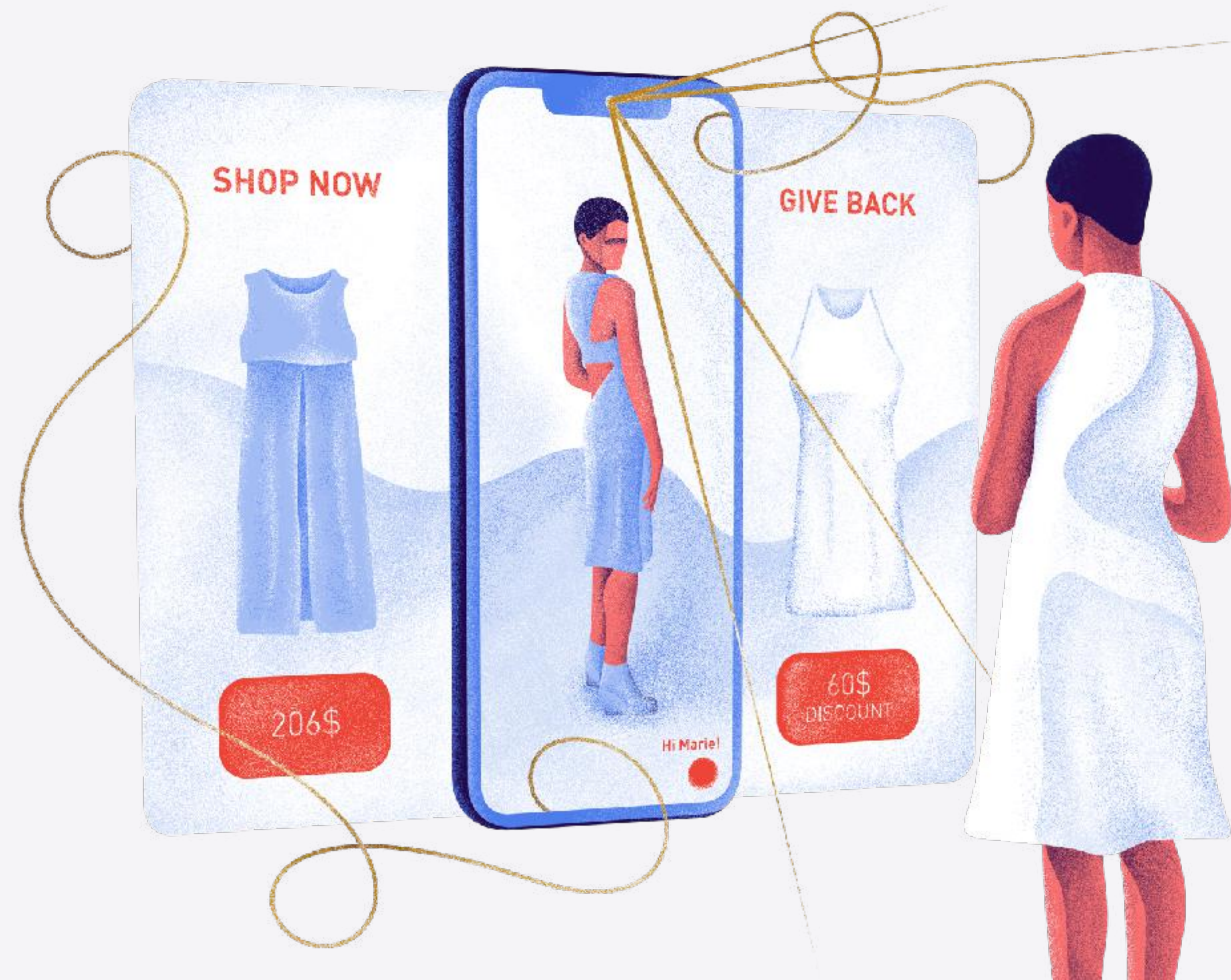
Insight into global  
technology markets or  
(globally) relevant  
startups and their  
different development  
stages with regards to  
production readiness  
and adaptability to the  
European landscape



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PLUGANDPLAY

# Trends we are seeing





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## The pace of change is accelerating

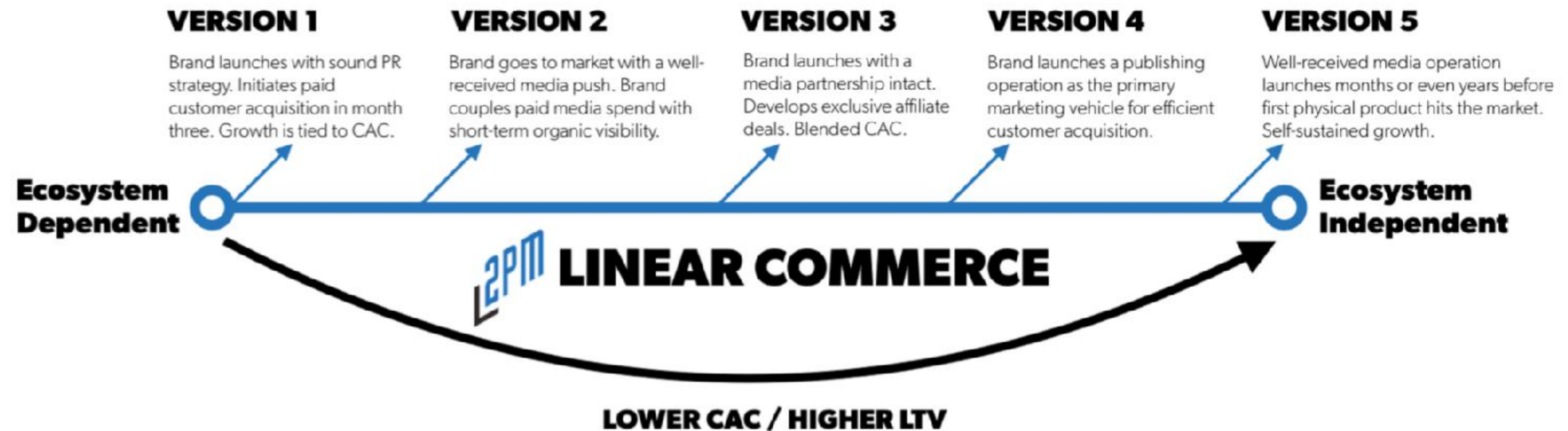
Customer expectations are changing

Competitive landscapes are shifting (e.g. Amazon and Google)

Collaboration between major corporations and startups is commonplace



## Prediction #1: The line between Media & Retail further blurs -> Linear commerce



(Web Smith 2PM)



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## Prediction #2: Retraining and training will be key for future of retail work

- With Stores closing and needs changing, **staff needs to be retrained** and the necessity for **continuous training** is growing
- Virtual courses and learning environments serve this need and make it easy for corporates to access
- Open online course provider Udemy saw a **425% increase** in enrollments from February to March 2020 and Masterclass raised **\$100M in Series E**
- Massive investment opportunities as the market will **continue to grow**

It's the Year 2120. MasterClass Is the Only School Left.

(New York Times)



## Prediction #3: E-Commerce increase leads to fulfillment & delivery challenges

- E-Commerce has grown by 25% YoY worldwide
- Customers expect convenience, speed and cost efficiency in their deliveries (1-Day Delivery)
- Players often are too slow to react to the new volumes and challenges

Therefore, **investment and efficiency opportunities arise in:**

- 1) **Tech Platforms that facilitate delivery**
- 2) **Alternative delivery solutions (e.g. Lockers, urban delivery services) & nano fulfillment**
- 3) **Novel forms of drop-shipping**
- 4) **Warehouse matchmaking solutions**





## Our retail focus topics for 2019 vs. 2020

### 2019



**On Demand Production**

**New Store Concepts**

**D2C Brands**

**Unstructured Data Analysis**

**Experimental Marketing**

### 2020



**Linear Commerce (New Platforms, Media)**

**Headless Commerce**

**Remote Work**

**Retraining & Continuous Learning**

**Fulfillment & Delivery**



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**Want to become a partner or learn more? Reach out to us**



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