

TELEFÓNICA OPEN FUTURE

EUROPEAN DIGITAL FORUM

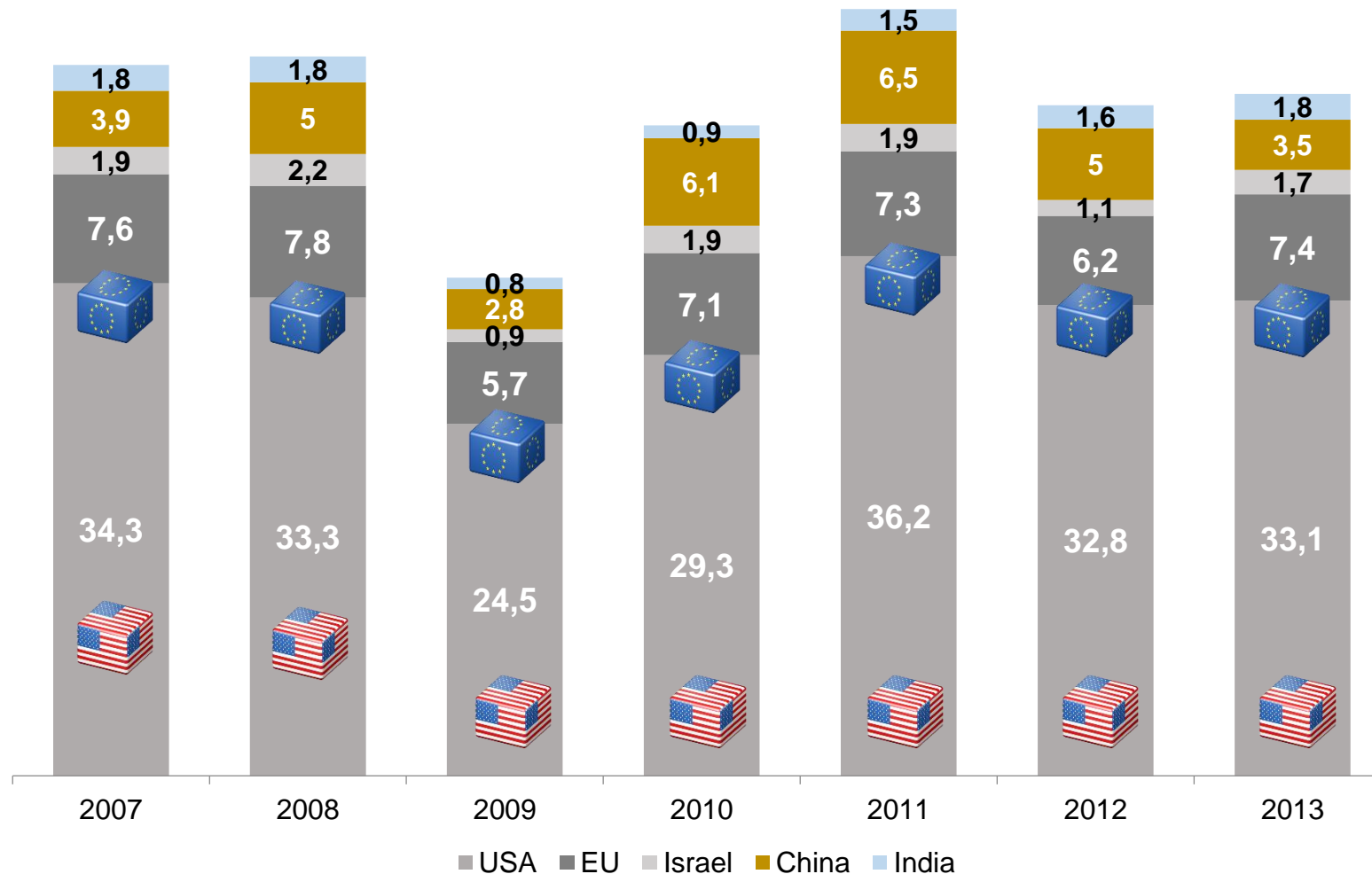
1st JUNE, 2015



VENTURE CAPITAL MARKET INSIGHTS

USA dominate the VC industry followed by Europe and China

Global annual VC investment 2007-2013 (US \$ Bn)



A reality:

Europe is the second largest hotbed in the global VC ranking.

An

opportunity:

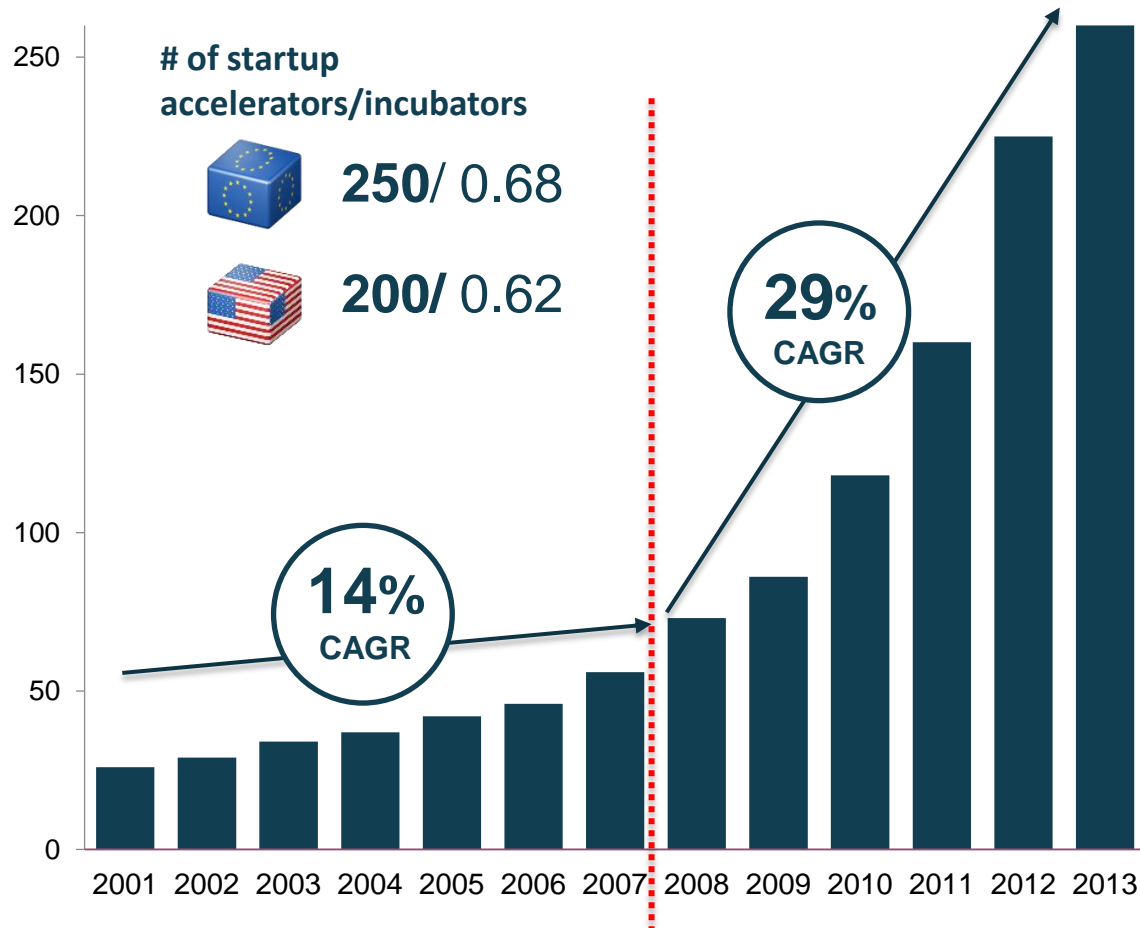
The remarkable rebound in Europe has allowed a **19%** rise in capital invested.

Challenge:

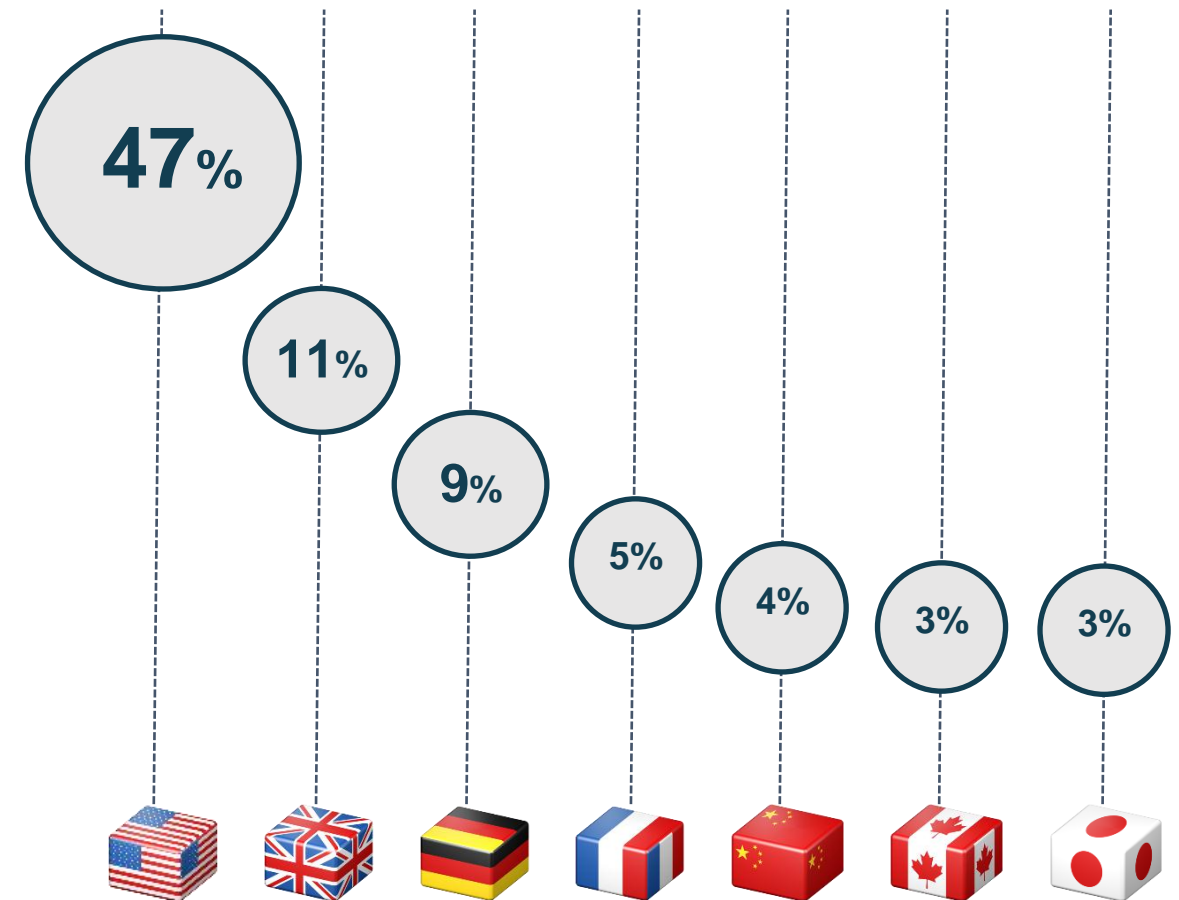
Europe represents only the **15%** of global VC activity when the US accounts for **68%** of global VC activity.

The European startup ecosystem is healthy... but mature investment opportunities are seized by non-European investors

Accumulated number of incubators and accelerators in 10 European countries



European scaleups exits by origin of buyers in 2014



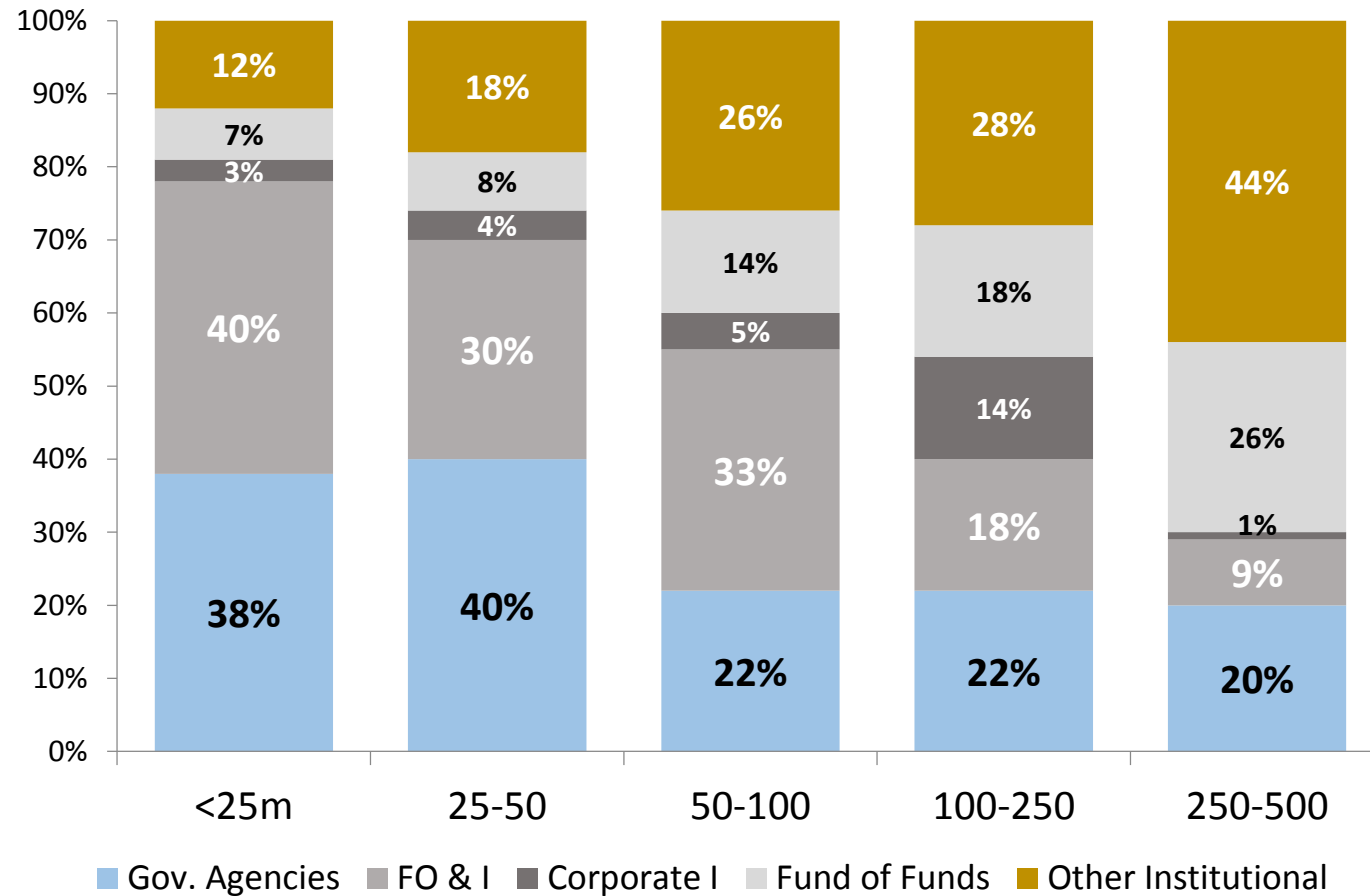
Source: Telefónica based on The Accelerator and Incubator ecosystem in Europe and SEP monitor, 2015.

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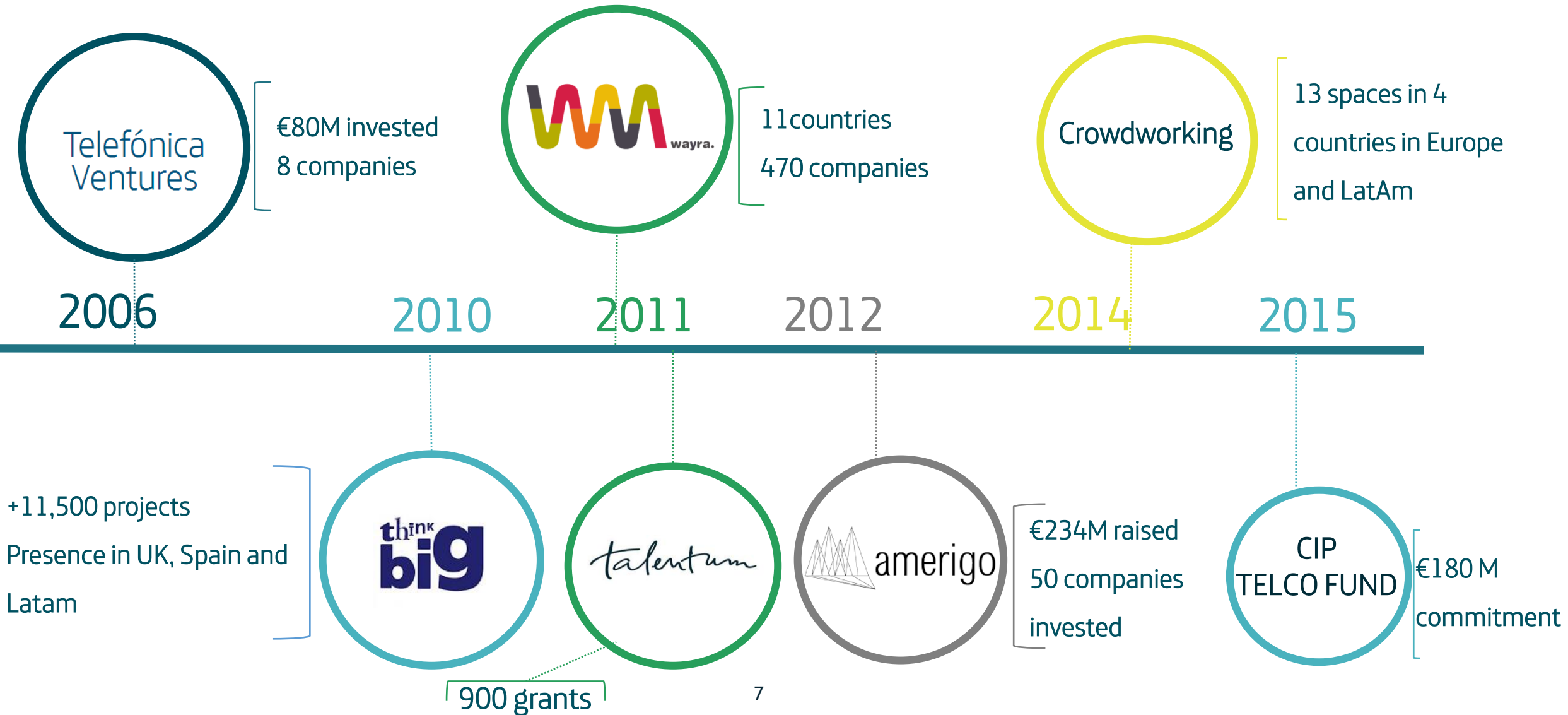
Government agencies dominate the VC scene in Europe, particularly in funds sized under €50m

VC Funds with Final Closing 2009-2014 – by fund Size

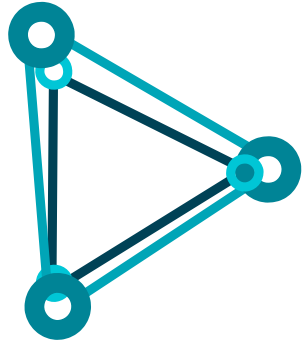


*TELEFÓNICA IS ENGAGING PUBLIC AND PRIVATE PARTNERS TO
ENCOURAGE EUROPEAN ENTREPRENEURIAL ECOSYSTEMS*

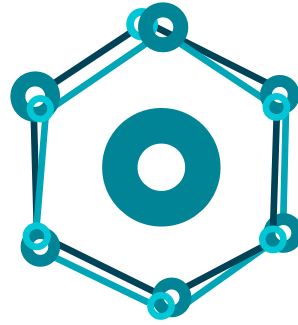
Over the last years Telefónica has launched several initiatives to promote entrepreneurship and investment in technological projects...



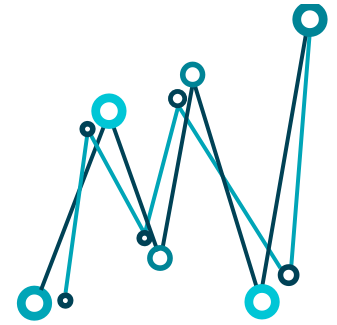
All this initiatives have been integrated in a single model which accompanies talent in all its growth phases: Open Future_



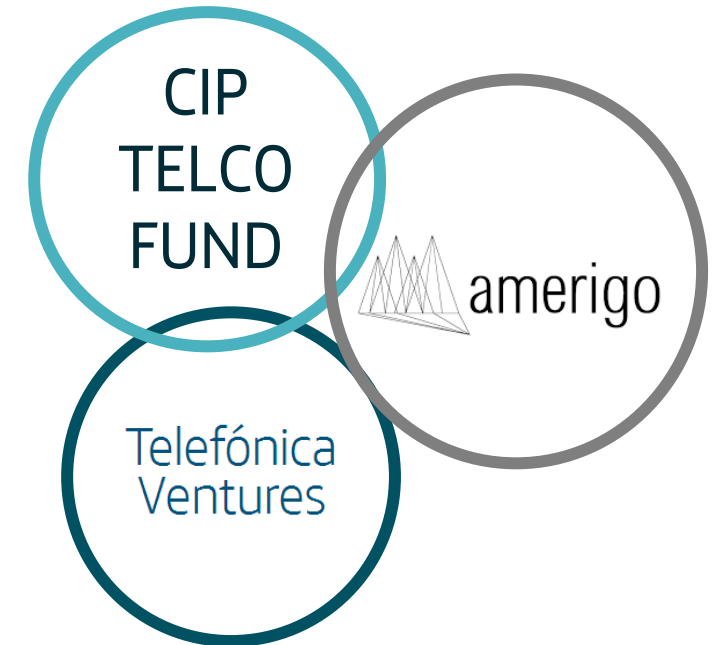
ENCOURAGE_



ACCELERATE_



INVEST_



Telefónica's global entrepreneurship and innovation network, open to partners

Wayra

Venezuela	Mexico
Brazil	Ireland
Argentina	UK
Chile	Germany
Peru	Czech Republic
Colombia	Spain (2)

Crowdworking

Seville (ES)	Costa Rica
Caceres (ES)	Chile
Tarragona (ES)	Ecuador
Santiago de compostela (ES)	

Amerigo

Chile
Brazil
Colombia
Peru
Mexico
Spain (2)

Telefónica Ventures

USA
Israel

China Open Future

China

550

companies
invested

62

public &
private
partners

17

different
countries

€647M

total investment
committed
(Telefónica &
Partners)

€738M

total amount
devoted to TOF_
Initiatives

Telefónica

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FUTURE_*

ANNEX-DETAIL OF THE INITIATIVES

OPENFUTURE.ORG

STARTED IN OCT 2014

Sign Up Now

Connect with



or enter your email

EMAIL

PASSWORD

Forgot your password?

LOG IN

OR ENTER YOUR EMAIL

Telefonica

OPEN FUTURE

Welcome to a place where your ideas come true. No matter if you are an entrepreneur, startup, or company, Open Future offers you a space to achieve this.

+ 7000
USERS

+ 40
CHALLENGES
LAUNCHED

+ 2000
PROJECTS
CREATED



11,500
PROJECTS HELPED

6
COUNTRIES



Talentum

Construye tu futuro
con Telefónica.

900
STUDENTS
GRANTS

CROWDWORKING SPACES

STARTED IN FEB 2014

CHILE (1)

ECUADOR (1)

***COSTA RICA
(1)***

SPAIN (4)


CHINA (2)

EXTREMADURA
OPEN FUTURE™

Open ideas. Open Future™

**Crowdworking
Garaje 2.0**

UNA INICIATIVA DE *Extremadura*

gob 



WAYRA

STARTED IN APR 2011

13
ACADEMIES

11
COUNTRIES

466
STARTUPS

€108,7M
**FUNDING
RECEIVED BY
STARTUPS**

*A BUSINESS OPPORTUNITY FOR THE STARTUP
THROUGH TELEFONICA COMMERCIAL UNITS*

**SOCIAL
BEYOND**

wayra.

**TURN YOUR WIFI
INTO YOUR
FAVOURITE
SOCIAL MEDIA
MARKETING TOOL.**



movistar

Deigual

nostrum

Häagen-Dazs

AMÉRIGO

STARTED IN JUN 2012



PRESENCE
IN SPAIN

PRESENCE
IN LATAM

48
COMPANIES
(4 EXITS)

€234M
FUND
COMMITTED

ReviewPro

jobandtalent

adjust

SanaExpert
aus Liebe zur Gesundheit

minube

peerTransfer
International education payments made easy

Redbooth

Barnebys®

Captio

ticketbis

inbenta

vizzuality

packlink.es

traity

ODILO

PER|CEN|TIL

FISHBRAIN

Promociones
Farma.com

*INTERNATIONALIZING A SOLUTION WHICH IS CORE
FOR TELEFÓNICA BUSINESS*

Blueliv.



Serious Security— simpler.

With our turnkey platform, you can see results in minutes
and scale quickly with low risk.

REMOVE THE COMPLEXITY FROM SERIOUS PROTECTION >

TEF VENTURES
STARTED IN 2006

Telefónica
Ventures

PART OF **OPEN FUTURE_**



**GLOBAL
PRESENCE**

**MAINLY IN
ISRAEL AND
US**

9 COMPANIES

**€85M
INVESTED**

INVESTING IN THE FUTURE NETWORK



Telefónica
Ventures



TELEFÓNICA LAUNCHED OPEN FUTURE_ A GLOBAL NETWORK TO FOSTER STARTUP ECOSYSTEMS WITHIN THE COLLABORATION OF PRIVATE AND PUBLIC PARTNERS.



openfuture.or

think
bi9



amerigo

talentum

Crowdworking

Telefónica
Ventures

BY MEANS OF A MODEL WHICH ACCOMPANIES TALENT IN ALL ITS GROWTH PHASES.

#1 WHERE PUBLIC AND PRIVATE PARTNERS COLLABORATE TO FOSTER LOCAL ECOSYSTEMS.

#2 WHERE UNIVERSITIES PLAY A KEY ROLE.

#3 WHERE BIG CORPORATIONS ARE CHALLENGED TO START WORKING WITH STARTUPS.

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