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Job Board

CBRE

# Netherlands Startup Employment 2021

Third Edition, October 2021



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Dealroom.co is the foremost data provider on startup, early-stage and growth company ecosystems in Europe and around the globe. Founded in Amsterdam in 2013, we now work with many of the world's most prominent investors, entrepreneurs and government organizations to provide transparency, analysis and insights on venture capital activity. Our offerings include data sets via SaaS and API as well as custom reports and bespoke ecosystem platforms.



At Techleap.nl, it is our mission to establish the Netherlands as the ideal place to start, scale, and internationalize innovative businesses. With our unique connection to the government, corporations, investment funds, startups, and innovation hubs, we aim to merge the Dutch startup ecosystem into one single connected and ambitious hub. We break down barriers and improve access to talent, capital and markets..



CBRE Group, Inc. is the world's largest commercial real estate services and investment firm, with 2019 revenues of \$23.9 billion and more than 100,000 employees (excluding affiliate offices). CBRE offers a broad range of integrated services, including facilities, transaction and project management; property management; investment management; appraisal and valuation; property leasing; strategic consulting; property sales; mortgage services and development services.

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# This is the 3<sup>rd</sup> edition of the Netherlands Startup Employment report by Techleap.nl, CBRE and Dealroom.co

In this report, we look at different cohorts (i.e. generations) of startups founded since 1990. Not every company qualifies as a startup. Only about 2% of all new companies do. The term “startup” is defined in the methodology section.

People often ask why we include older cohorts. The purpose of a startup is to grow fast and then become very big. This is what makes startups relevant to the economy. Getting big often takes two decades (although sometimes shorter). Not including these late-stage startups would defeat the purpose of this report.

This report builds on the [Techleap.nl Startup Finder](#), which is powered by Dealroom. We only count local jobs (based in the Netherlands) created by homegrown startups. We do not include jobs created by [foreign startups](#) in the Netherlands, e.g. Uber in Amsterdam or Templafy in Eindhoven.

As our coverage of the Dutch ecosystem improves, new startups are discovered and new data is added to existing companies. This comes on top of the growing number of startups founded in the Netherlands each year. As a result, the dataset supporting this report has grown to include over 6,000 companies. See the methodology section for an in-depth overview of our approach.



# What you need to know.

## More startup jobs than ever.

The Dutch startup ecosystem currently generates over 130K local jobs across every Province. This is 10K net new jobs, compared to pre-pandemic levels, and in spite of slower hirings in the first part of 2020 (see the [2020 report](#)).

## Distributed growth

Jobs are created right across the country. The vast majority of startup jobs, as well as newly-created jobs, are located outside of the Amsterdam Hub and the wider North-Holland Province.

Groningen in the North, and Brabant in the South of the Netherlands, stand out as two of the best-performing provinces when it comes to job growth.

## A competition for talent rages.

More companies are joining the race for talents across a variety of roles. Startups aren't just looking for tech jobs, such as engineers and developers.

In fact, most roles currently open are in functions including sales, business development, legal, HR or customer support.

## Emerging trends

Impact-driven Dutch startups are creating a disproportionate number of jobs.

A new generation of employee alumni of Dutch tech behemoths that have gone on to become entrepreneurs in their own right, are leading a wave of job-creating startups across the country.

This snowballing effect is a sign of a maturing ecosystem, where talent is recycled in the entrepreneurial ecosystem.

# Key Figures.

**11K**

Homegrown startups, scaleups and grownups. **6.1K companies are included in the report.\***

**130K**

Local jobs at homegrown startups. This is an 8% annual growth since 2018, with a notable acceleration in some sectors.

**€5B**

**VC funds invested** in 2021 into homegrown startups, as of October 2021.

**€296B**

Combined enterprise value of homegrown startups, as of October 2021.

\*Companies with jobs data and at least two known employees in the Netherlands. See the methodology for more information.

**1**

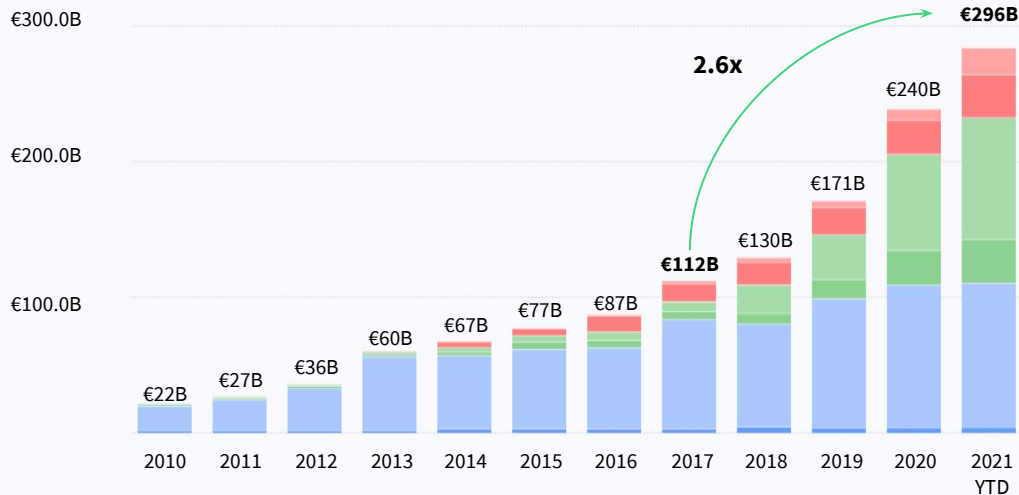
# The Dutch Startup Landscape



# The combined value of Dutch startups, scaleups and grownups has reached €296B, 2.6x more than in 2017, on the first edition of this report series.

## Enterprise value of Dutch tech companies founded since 1990 [» view online](#)

■ 1990-1994 
 ■ 1995-1999 
 ■ 2000-2004 
 ■ 2005-2009 
 ■ 2010-2014 
 ■ 2015-2021



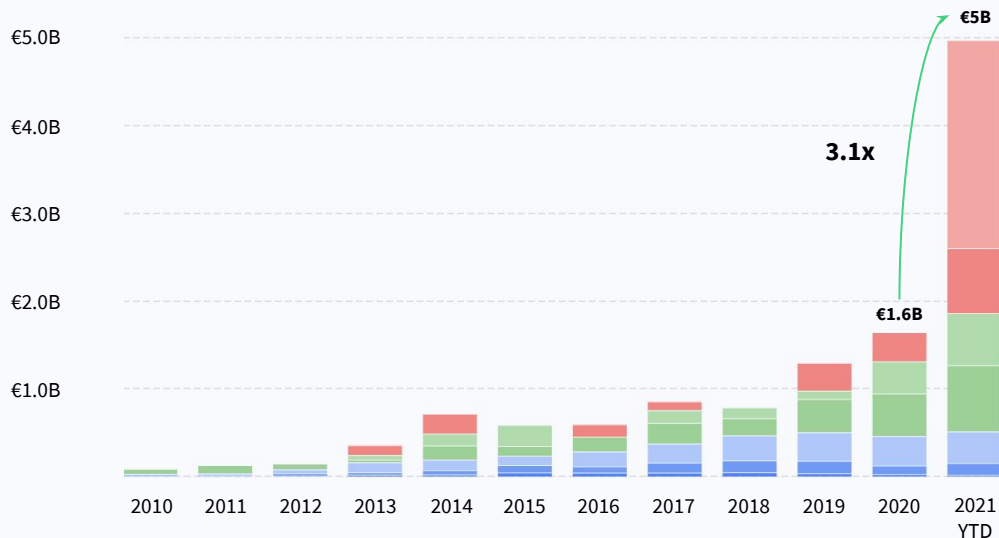
## Most valuable tech companies founded since 1990 [» view online](#)

NAME	MARKET	TYPE	GROWTH SIGNAL	LAUNCH DATE	VALUATION
<b>B.</b> Booking.com #1 hotel booking site owned by Bo...	B2C travel accommodation	machine learning artificial intelligence commission marketplace & ecommerce	<span style="color: red;">↘</span> 15k	1996	€87.5b
<b>adyen</b> Leading next generation global pa...	B2B fintech payments	machine learning artificial intelligence commission saas	<span style="color: green;">↗</span> 2,234	2006	€81.6b
<b>Just Eat Takeaway</b> The leading online food delivery m...	B2C food food logistics & delivery	commission marketplace & ecommerce	<span style="color: red;">↘</span> 1,491	2000	€17.5b
<b>OLX</b> Global general online classifieds pl...	B2C fashion home living apparel	machine learning artificial intelligence commission marketplace & ecommerce	<span style="color: green;">↗</span> 4,000	Mar 2006	€7.7b
<b>Interxion</b> Europe's leading carrier neutral da...	B2B hosting	commission subscription	<span style="color: green;">↗</span> 1,049	Apr 1998	€7.6b
<b>Acerta Pharma</b> Clinical research on cancer and au...	B2B health biotechnology	manufacturing	<span style="color: red;">↘</span> 135	2011	€6.4b
<b>Mollie</b> Payment methods in your website ...	B2B fintech payments	machine learning mobile app artificial intelligence commission saas	<span style="color: green;">↗</span> 488	2004	€5.9b
<b>BE Semiconductor Industries</b> Supplier of semiconductor assem...	B2B semiconductors	hardware deep tech selling own inventory manufacturing	<span style="color: green;">↗</span> 503	May 1995	€5.5b
<b>MessageBird</b> Connects enterprises to global cus...	B2B, B2C telecom enterprise software	hardware subscription	<span style="color: green;">↗</span> 453	Jan 2011	€3.5b

# At over €5.0B since the beginning of the year, VC funding into Dutch startups is already higher than ever, boosted by mega rounds.

## VC investment in the Netherlands » [view online](#)

■ €0–1M (pre-seed) 
 ■ €1–4M (seed) 
 ■ €4–15M (Series A) 
 ■ €15–40M (Series B) 
 ■ €40–100M (Series C) 
 ■ €100–250M 
 ■ €250M+



## Over 450+ Netherlands-based startups raised in 2021 » [view online](#)

NAME	MARKET	TYPE	GROWTH SIGNAL	LAUNCH DATE	VALUATION
<b>MessageBird</b> ★ ❤️ Connects enterprises to global cus...	B2B, B2C telecom enterprise software	hardware subscription saas	453	Jan 2011	€3B
<b>Picnic</b> ★ ❤️ Online supermarket, that delivers...	B2C food food logistics & delivery	machine learning artificial intelligence marketplace & ecommerce	2,213	Oct 2015	€2.4B
<b>Mollie</b> ★ ❤️ Payment methods in your website...	B2B fintech payments	machine learning mobile app artificial intelligence commission saas	488	2004	€5B
<b>Redwood Software</b> ★ ❤️ Cloud-based business process aut...	B2B enterprise software	subscription saas	201	1993	-
<b>bunq</b> ★ ❤️ Reinventing money itself with mo...	B2C fintech banking	subscription	237	2012	€1B
<b>Sendcloud</b> ★ ❤️ Helping +23,000 e-commerce busi...	B2B transportation enterprise software logistics & delivery	subscription	345	Oct 2012	€66M
<b>VanMoof</b> ★ 🚲 ❤️ Dutch company that builds and sel...	B2B, B2C sports transportation vehicle production mobility	iot internetofthings hardware connected device commission selling own inventory	462	May 2009	€465M
<b>NewAmsterdam Pharma</b> ❤️ Clinical stage company focused on...	B2B health pharmaceutical biotechnology	selling own inventory manufacturing	12	2019	€640M

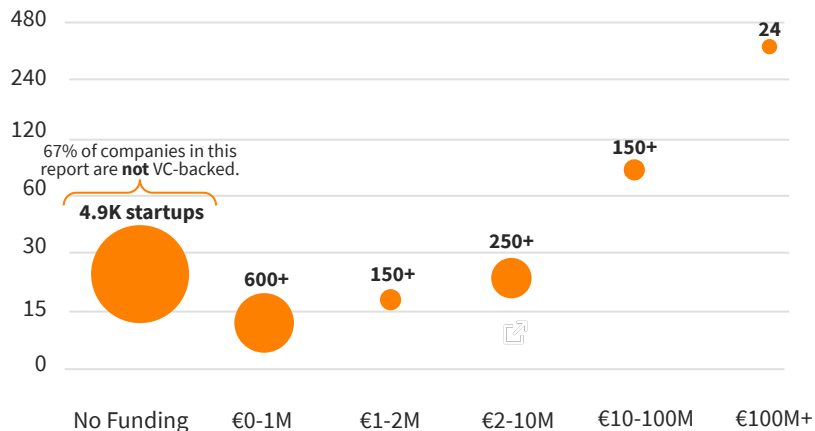


# VC funding is a catalyst for job growth.

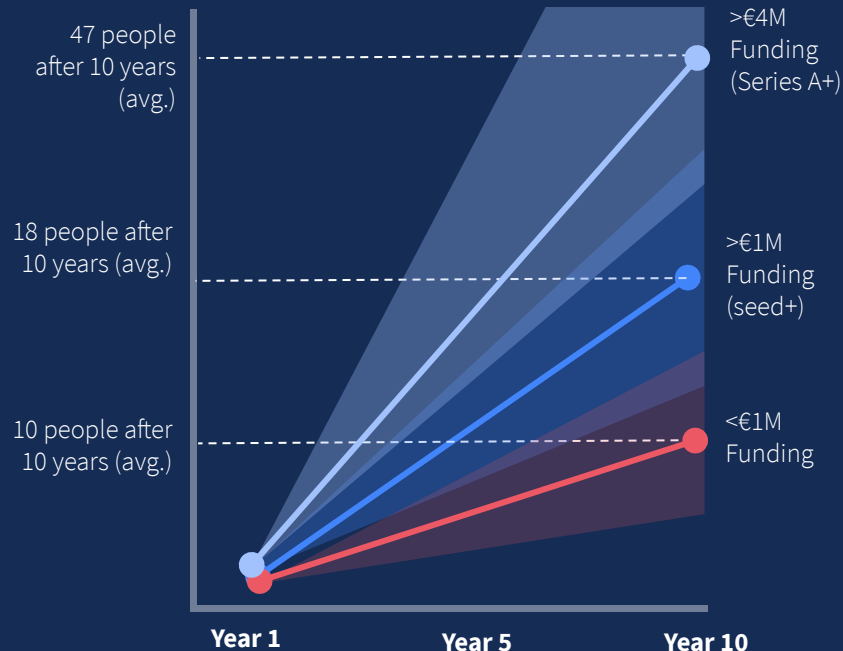
The recorded growth in VC funding in 2021 so far signals that the dutch tech ecosystem has surpassed pre-pandemic levels.

VC funding and jobs growth are linear. On average, startups receiving seed funding scale two times faster than those that didn't. Series A+ startups grow five times faster. As a result, **VC funding at a record level in 2021 bodes well for further employment growth.**

### Average number of local employees by VC-funding stage, 2021

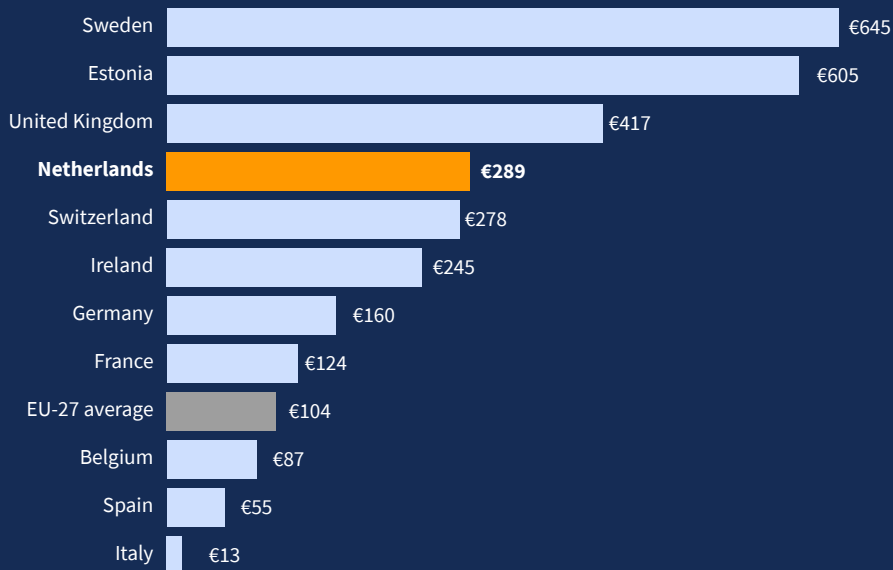


## VC-backed or not: very different growth trajectories

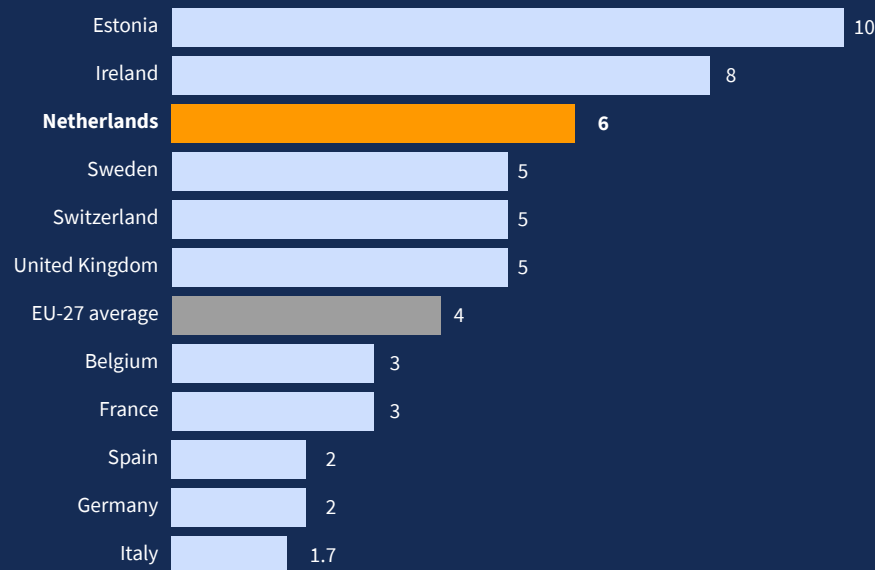


# Dutch startups rank favourably on the European stage, but have still raised less than half the VC investment per capita of Sweden in 2021.

## Startup investment per 1M inhabitants, 2021

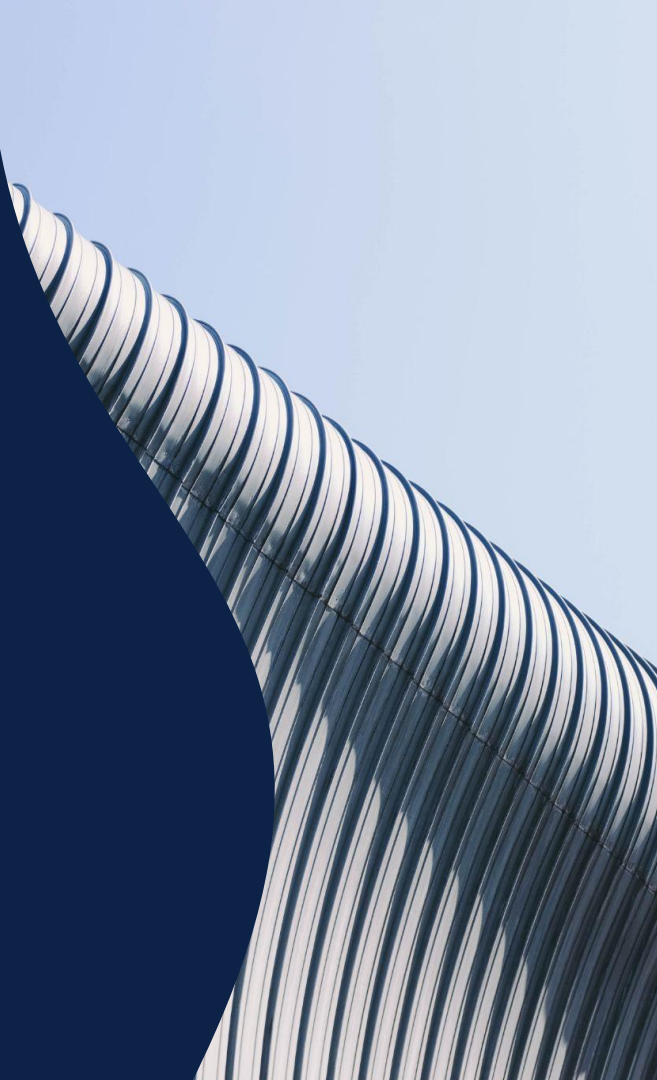


## Startup density per 1M inhabitants



2

# Startup Employment



# Companies in this report.

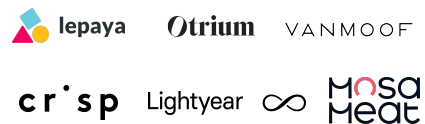
## Grownups

Former startups & scaleups.  
More than 500 people globally.  
Founded in the Netherlands  
after 1990 (in the information age).



## Scaleups

Former startups.  
50-500 people globally.  
Founded in the  
Netherlands after 1990.

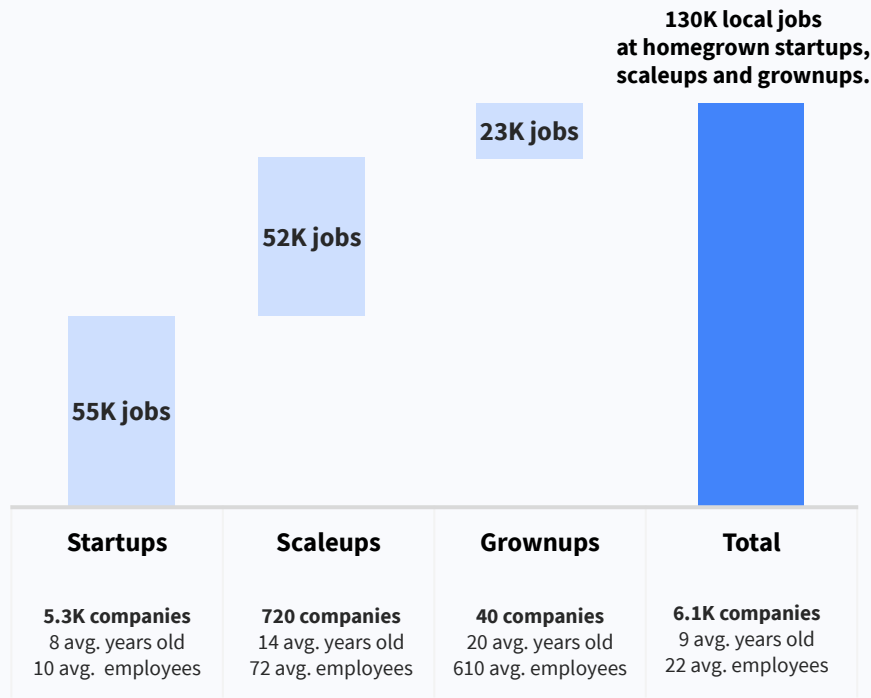


## Startups

Companies designed  
to grow fast.  
VC-backable business model.  
Less than 50 people.  
Founded in the  
Netherlands after 1990.



# Employees by company type.

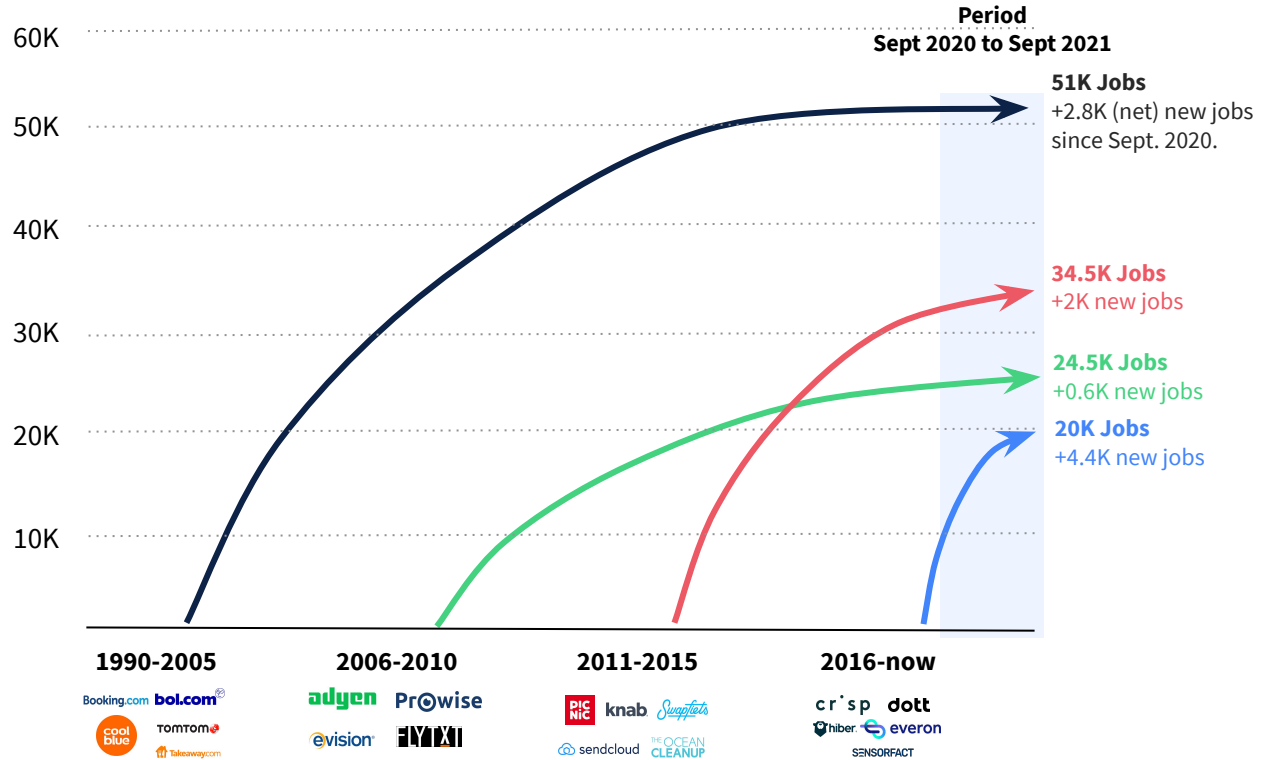


# Startups in the Netherlands currently generate 130K jobs, with younger companies adding most of the new positions.

Following a similar trend observed in previous reports, companies founded before 2005 remain the biggest employers in the dutch startup and scaleup ecosystem, currently employing 51K people across the country. However, this cohort of companies now records the slowest growth, at 2.5% year-over-year on average.

The youngest cohort of companies is providing the lion's share of new jobs: Startup founded since 2016 created over 40% of all (net) new jobs, or a little over 4.4K new local jobs.

## Total jobs



Source: Dealroom.co

# A new generation of startups is emerging as former employees of Dutch tech behemoths turn to entrepreneurship.

Using Dealroom data, we identified 70+ startups (co-)founded by former employees of just 20 homegrown mature tech companies and unicorns in the past 10 years. This new generation of companies already generates 2.5K local jobs, and over 4.5K jobs globally.



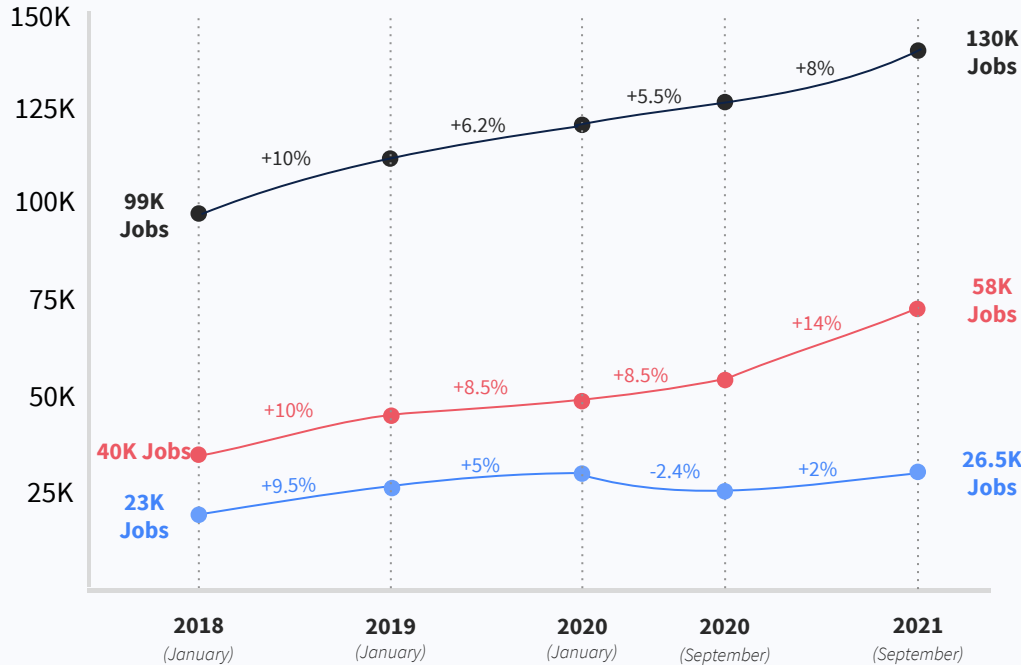
**3**

## **Growth by Sector**



# Job growth is increasingly uneven across sectors.

## Total jobs



■ Total employment at homegrown startups

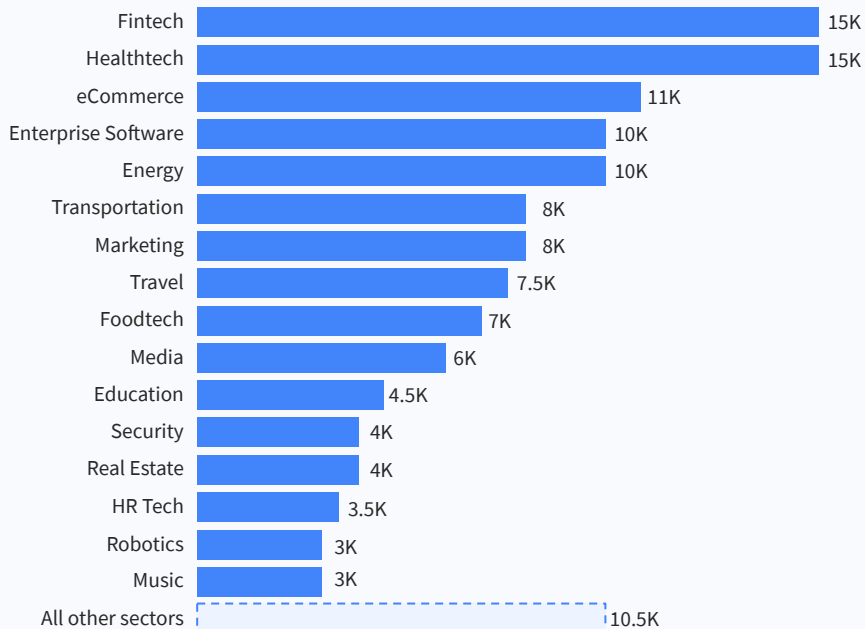
■ 5 top job-creating sectors: Health, Fintech, eCommerce, Energy, Foodtech.

■ 5 slow-growth sectors: Travel, Media, Marketing, Telecom, Hosting

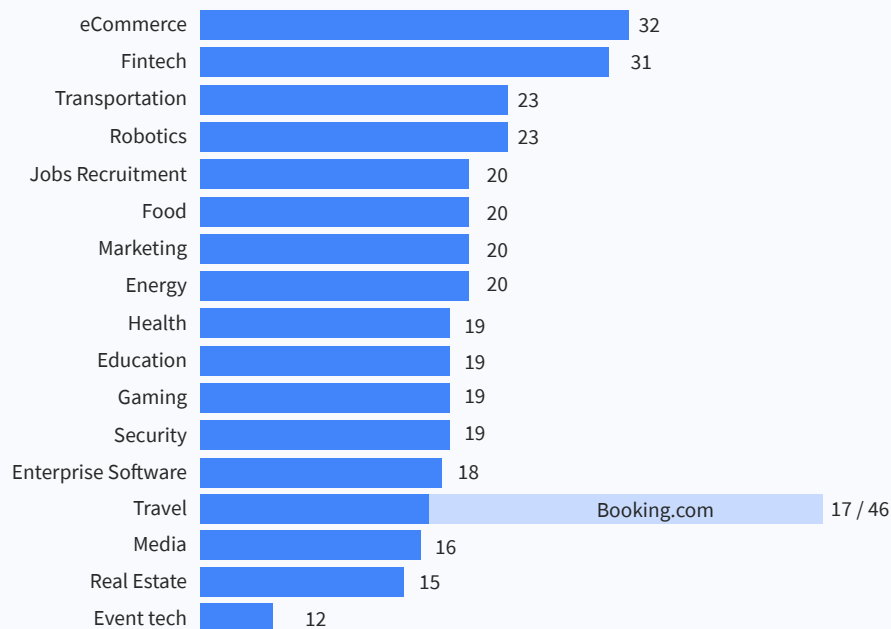


# Fintech and Healthtech provide the most jobs, eCommerce and fintech are have the largest teams on average.

## Startup jobs by sector, 2021



## Average team size by sector, 2021



# eCommerce is now growing the fastest, ahead of foodtech for the first time.

## Fastest-growing sectors of employment over the past year annual job growth, 2020-2021



## Fastest-growing sectors of employment, 2018 - Now average job growth, annualized



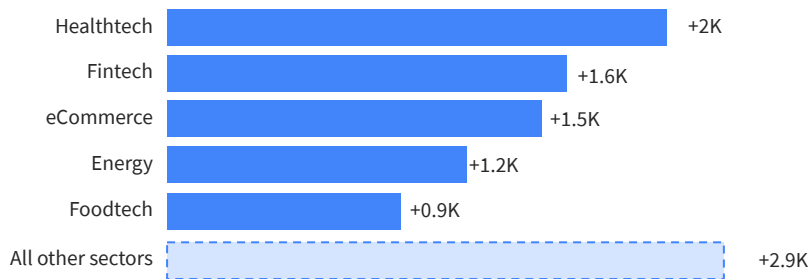
Whilst foodtech remains a dynamic sector and the fastest-growing since 2018, having dominated the job growth race on previous editions of this report series, it was outpaced by eCommerce for the first time over the past year.

**eCommerce is now growing the fastest, at 16% year-on-year**, a steep rise, considering it was growing at an average of 10% between 2018 and the emergence of Covid19.

**Coolblue, Otrium** and **Catawiki** are just a few examples of a rising number of homegrown successes in this space, which are contributing to this trend.

# Dutch Healthtech now creates more new jobs than any other sector.

Net new jobs added over the past year, by sector



**Healthtech overtook Fintech as the startup sector creating the most news jobs in the Netherlands.** Job growth at healthtech startups picked up significantly, rising from an average of 8.5% since 2018 (just above the national average over this period, at 8%), to over 13% over the past year, which is much faster than national average (still 8%).

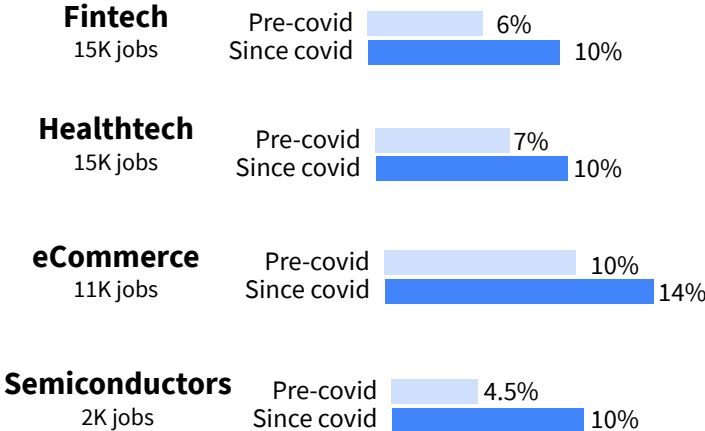
Taken together, the five leading sectors in terms of job creation, Healthtech, Fintech, eCommerce, Energy and Foodtech, contribute to over 70% of all net new jobs added over the past year.

» **Explore Dutch Healthtech startups**

# The post-Covid paradigm has drastically changed the job growth landscape.

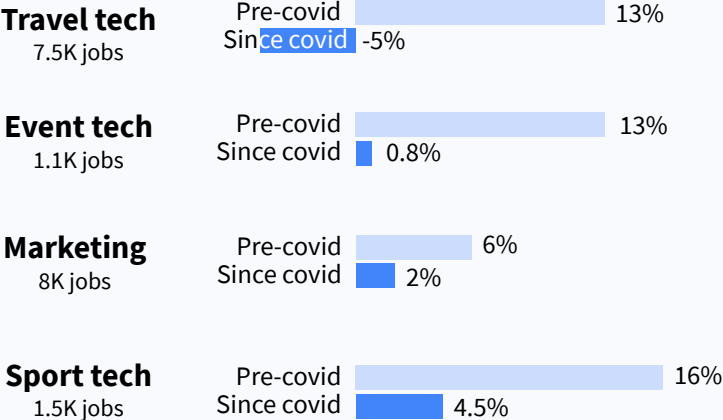
## Sectors accelerating since Covid

Average annual job growth, 2018 - 2019 v. Jan. 2020 - Sept. 2021



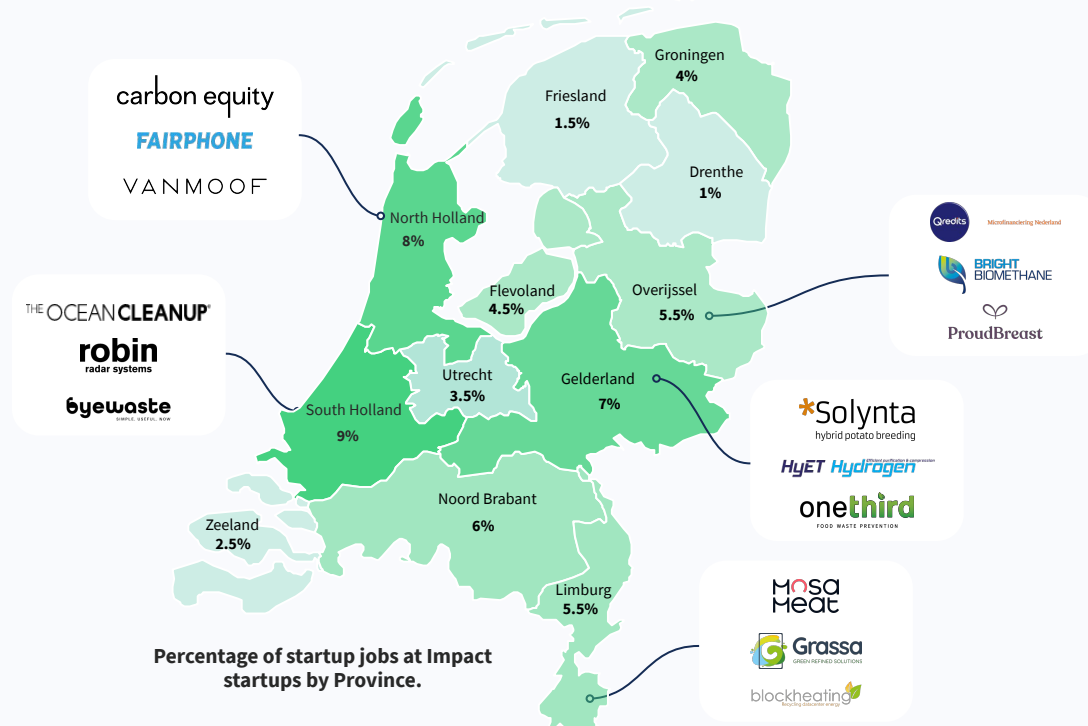
## Sectors slowing down since Covid

Average annual job growth, 2018 - 2019 v. Jan. 2020 - Sept. 2021



# 550+ dutch impact startups are crafting solutions for a better future. Today, they already provide over 7% of all startup jobs in the Netherlands.

Impact startups are emerging right across the country.





“Access to talent is the most important challenge to achieving growth at scale at the moment.

**Coos Santing**

Program Manager

**ImpactCity**  
The Hague

### **How has the hiring landscape in South Holland / The Hague changed in the last year and half?**

With Covid-19, everyone expected the number of vacancies to fall, but that didn't happen. More entrepreneurs are now finding it difficult to find employees than a year ago (17,3% vs 9,6%). This is clear in tech, but also in impact sectors such as energy transition.

### **Are there any roles that are particularly hard to fill?**

We of course see a shortage in backend developers. But in the impact economy we also see a shortage in engineers, as well as a shortage of marketing and communication experts.

### **South Holland-based impact startups are performing well according to our data. Why do you think that might be?**

With programs like ImpactCity, we've been investing in the Impact Economy for many years now. The region also hosts several of the best universities and universities of applied sciences which create great founding teams of impact companies. The Hague as the seat of Government in the Netherlands is a good location for impact companies for whom government is an important stakeholder. While Rotterdam, with the largest seaport in Europe, still has a major transformation to undertake toward a carbon-neutral and circular port.

### **What are the challenges to scaling in South Holland / The Hague?**

Access to talent is the most important challenge. We have a lot of homegrown talent, but demand is so high we also have to hire internationally. Access to capital and appropriate office space are also key challenges.

# 4 Growth by Province



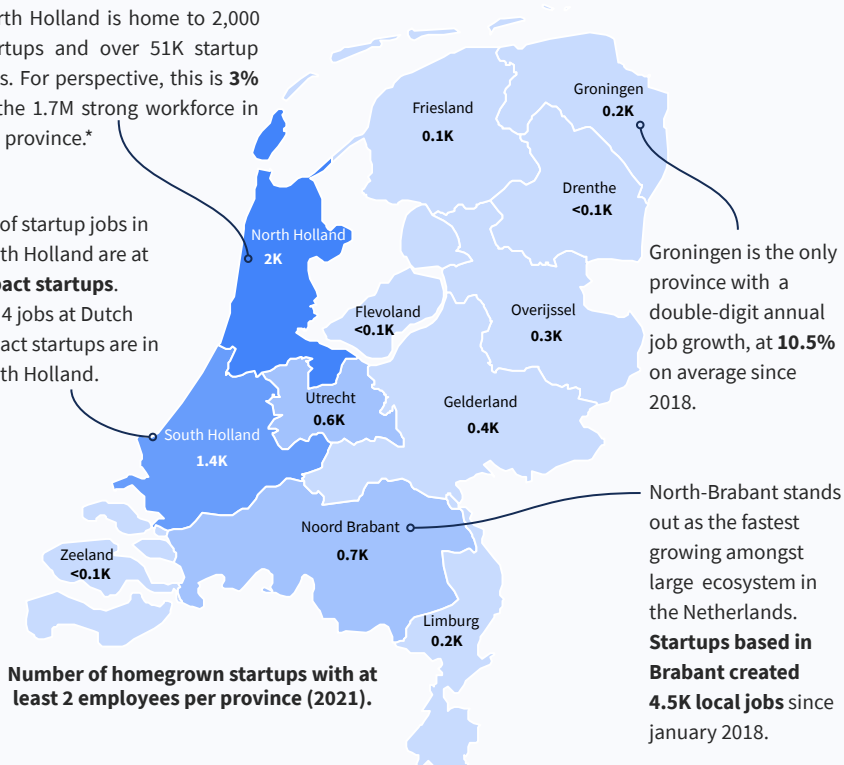
# Regional hotspots & Key figures.

North Holland is home to 2,000 startups and over 51K startup jobs. For perspective, this is **3%** of the 1.7M strong workforce in the province.\*

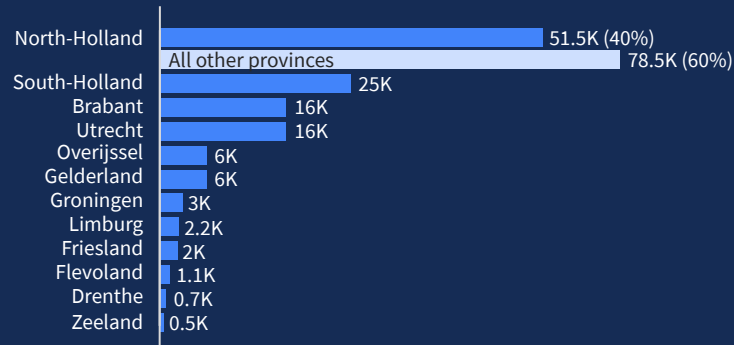
**9%** of startup jobs in South Holland are at **impact startups**. 1 in 4 jobs at Dutch impact startups are in South Holland.

Groningen is the only province with a double-digit annual job growth, at **10.5%** on average since 2018.

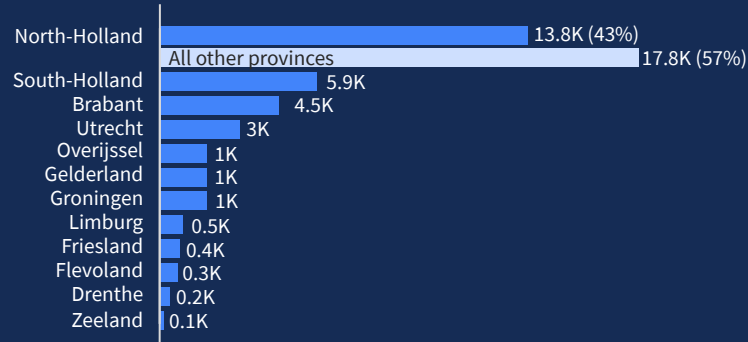
North-Brabant stands out as the fastest growing amongst large ecosystem in the Netherlands. **Startups based in Brabant created 4.5K local jobs** since January 2018.



## Startup jobs by Province in 2021



## Net startup jobs added since 2018





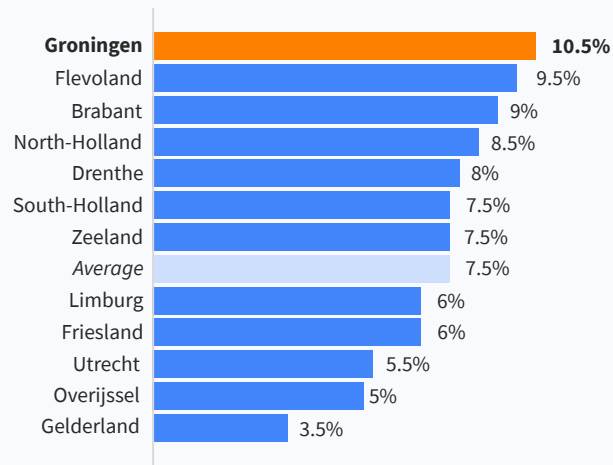
# Groningen and Brabant stand out as the fastest-growing startup ecosystems.

North Holland, which includes the Amsterdam region, is home to the largest pool of startup jobs in the Netherlands. But the majority (**60%**) of startup jobs are actually located outside of **North-Holland**.

Looking at job growth, **Groningen** takes the lead: the ~200-strong startup ecosystem has grown its ranks by over 10% annually since 2018. This translates into over **1,000 new local jobs** at Groningen based startups since 2018. North-Holland on the other hand, only comes 4th at an annual 8.5% job growth on average over the same period. This is above the national average, which stands at 7.5%.

**Brabant stands out** as the 4th largest pool of startup jobs in the Netherlands, with over 16K jobs in 700+ startups in 2021. Brabant is the 3rd fastest growing province and fastest-growing amongst major dutch ecosystems, at an annual rate of 9% since 2018. This translates into 4.5K net startup jobs created by Brabant-based startups since 2018.

Annual job growth per Province, 2018-2021



# The number of monthly hires vary widely by province and sector.

Monthly net new jobs over the past year, by sector and province.

	Noord Holland	Zuid Holland	Noord Brabant	Utrecht	Overijssel	Groningen	Gelderland	Friesland	Limburg	Flevoland	Drenthe	Zeeland
All sectors	+400	+130	+150	+50	+20	+25	+30	+10	+6	+5	+2	+2
	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓
Healthtech	+64	+33	+15	+22	+14	+5	+10	+3	+2	+2	±0	±0
Fintech	+105	net loss	+7	+17	+4	+2	+3	±0	±0	+1	±0	±0
eCommerce	+32	+68	+6	+12	net loss	+3	+5	+1	±0	+2	±0	±0
Energy	+53	+8	+33	+5	±0	+3	net loss	+6	net loss	±0	±0	±0
Foodtech	+40	+7	+15	+1	±0	±0	+5	±0	+6	+1	±0	+2
Industrial Tech (Robotics + Semiconductors)	+6	+7	+28	±0	+4	<1	±0	±0	±0	±0	+1	±0

Growth in **Healthtech** jobs is the most geographically distributed. Healthtech startups are adding jobs across the country, and the sector accounts for a significant share of startup jobs growth in some provinces, notably Overijssel and Gelderland.

**Fintech** startups in North-Holland are adding jobs faster than anywhere else. Over the past year, 230+ Fintech startups in the province created 100+ jobs per month on average, amounting to one in four net new startup job in North Holland.

**Industrial tech** startups (Semiconductor and Robotics startups) are growing the fastest in Brabant. Over 50 industrial tech startups and scaleups created 28 new jobs a month over the past 12 months. Driving this trend are homegrown heavyweights such as [Prodrive Technologies](#), and rising stars such as photonics specialists [Smart Photonics](#) and [EFFECT Photonics](#).

**Foodtech** startups are also growing across every province. In Limburg, Foodtech is the fastest growing sector: [Mosa Meat](#) and other innovative Foodtech startups driving a surge in job creation.

# Take a deep-dive into the Dutch ecosystem & beyond with our interactive comparison chart.

	NUMBER OF STARTUPS	NUMBER OF STARTUPS FOUNDED IN LAST 10 YEARS	NUMBER OF UNICORNS	NUMBER OF FUNDING ROUNDS	VC FUNDING	MOST FUNDED INDUSTRIES IN LAST 36 MONTHS
Netherlands	11k	7,269	24	3,135	€13.0b	1. enterprise software 2. health 3. fintech
North Holland, Netherlands	3,461	2,564	17	1,466	€8.3b	1. fintech 2. telecom 3. enterprise software
Amsterdam region	3,106	2,366	16	1,413	€8.2b	1. fintech 2. telecom 3. enterprise software
South Holland, Netherlands	2,199	1,524	2	651	€1.4b	1. health 2. enterprise software 3. energy
Rotterdam Metropolitan Area	1,698	1,229	0	523	€1.0b	1. health 2. enterprise software 3. home living
Noord-Brabant, Netherlands	1,157	749	3	316	€1.2b	1. health 2. transportation 3. enterprise software
Utrecht Region	1,007	666	0	225	€1.2b	1. health 2. enterprise software 3. fintech
Gelderland, Netherlands	716	475	1	138	€276m	1. health 2. food 3. energy
Overijssel, Netherlands	461	294	0	123	€118m	1. transportation 2. semiconductors 3. health
Groningen, Netherlands	314	235	0	40	€86.5m	1. energy 2. media 3. health
Limburg, Netherlands	295	205	1	71	€198m	1. food 2. health 3. energy
Friesland, Netherlands	189	113	0	17	€43.3m	1. energy 2. transportation 3. enterprise software
Flevoland, Netherlands	118	72	0	31	€29.4m	1. health 2. marketing 3. fashion
Drenthe, Netherlands	70	46	0	10	€3.4m	1. food 2. health 3. semiconductors
Zeeland, Netherlands	61	30	0	5	€50m	1. food 2. energy

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# 5 Access to Talent



**“The constant growth shows that the ecosystem is becoming more mature. An important consequence is that there is a huge demand for talent.**

“The Dutch labor market is currently unprecedentedly tight and many startups are struggling to find and retain the right talent. To take the next step, it is important that on a short term the Dutch government looks at a competitive tax rate for employee participation and accreditation of private coding schools. On the long term a clear strategy must be set to increase the current talent pool with both Dutch and foreign talent.

**Marloes Mantel**  
Director of Talent  
[techleap.nl](https://techleap.nl)



# A tight labour market means increased difficulties to scale for startups.

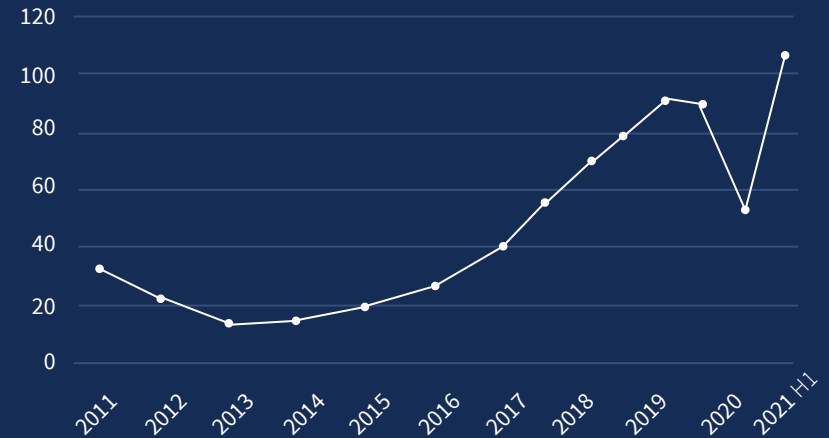
The Dutch economy will be growing fast according to the [latest figures](#) made available by the Netherlands Bureau of Statistics (CBS, in Dutch). Next year, unemployment should reach 3.6% in the Netherlands. This means that shortages on the labor market are here to stay.

In fact, it is suggested that tightness on the labour market, i.e. (the ratio between job openings and unemployed members of the labour force, has already reached its highest point in 50 years.

**For startups and scaleups with a hunger for talents, workforce shortages can stand in the way of growth.** Whilst startups are looking for a wide range of talents and skills, they also often seek to strike a balance between technical and interpersonal skills. Hiring plans are also increasingly driven by the need to maintain, if not to move towards, more diverse teams. As a result hiring isn't only about finding the right talent, but also one that fits the company's culture, and aspires to contribute to its mission whilst embracing its values.

## Tightness on the labour market\*

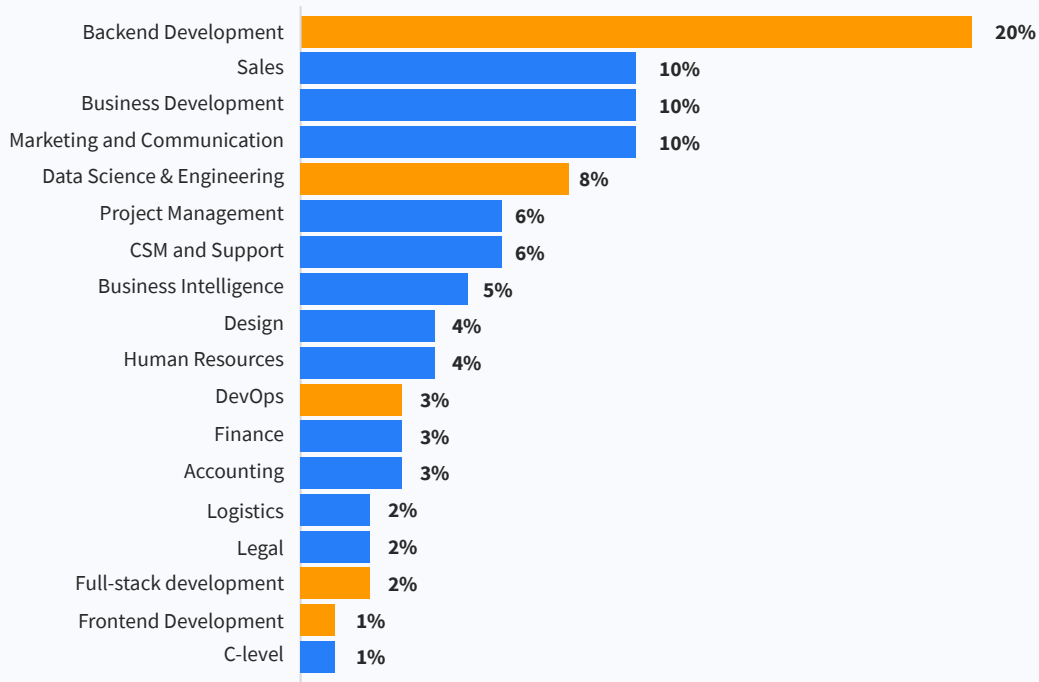
Job openings per 100 unemployed people



# Startups are hungry for talent across different skill sets.

## Job openings at dutch startups in october 2021 by position type

Tech jobs (34% of all current job openings) | Other positions (66%)



## Notable startups actively hiring in the Netherlands

mollie



adyen

felyx!

Lightyear ∞

Otrium

klippa



browse each startup's jobs openings

One clear goal to scale...



**Ruben van Bergeijk**  
Growth Marketeer

**SWISH FUND**

“We want to be the most attractive alternative financier for entrepreneurs in the Netherlands, but we also want to be the most attractive employer in the Dutch fintech industry!”

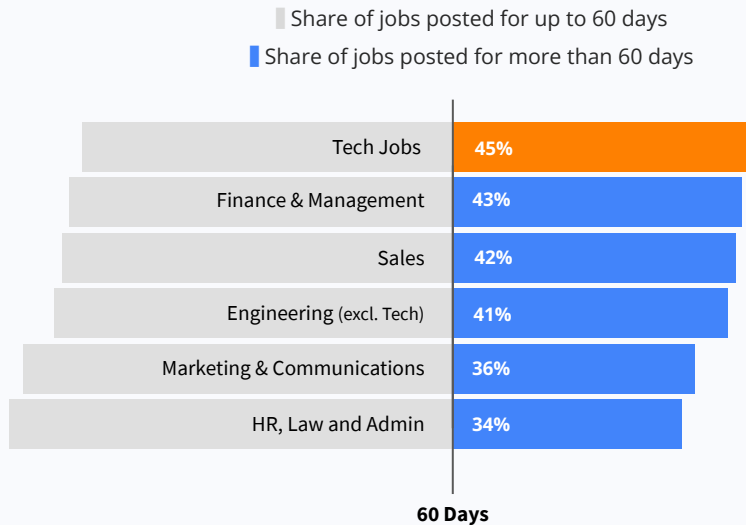
“Our biggest challenge remains finding new talents in combination with making our services scalable through technological development. Swishfund must be and remain attractive to be able to hire the right candidates.”

» [Read the full interview](#)



# Tech job openings are hardest to fill.

## Hard-to-fill positions by job function, 2021



**Tech jobs are hardest to fill in startups.** Out of 6000+ IT job openings (tech jobs), that opened and closed at startups in the last year, 45% stayed open 60+ days. This qualifies them as hard-to-fill jobs. Close behind are finance and management as well as sales positions, with 43% and 42% of hard-to-fill positions respectively, out of over 2,000 advertisements for each job function. On the other hand, just over a third of HR, Law and Admin positions remained online for over 60 days.

**As startups scale, they often look to fill positions that require specific competencies:** unlike the general technical demand for Microsoft Office, startups look for Software Engineering, Python, Data-Analysis or JavaScript skills, only to cite a few.

Additionally, more than a third of the job openings specify a **need for good communication skills and self-motivation**, according to an analysis of job descriptions from jobfeed by textkernel.

## Hiring during hypergrowth.



**Roline Spijkervet**

Head of Talent Acquisition at Picnic



**“At scale, the exciting challenge is to focus on building enough new things to stay ahead, keep operations of the existing business low, and find a healthy balance between moonshots, roof shots, and day-to-day ops.”**

“Our business has been growing very fast since the early days, but in the last two years we saw exceptional hypergrowth. Finding unique talent has never been easy. However, at scale we have now a new challenge that we need talent with very specific experience.”

[» Read the full interview](#)

# 5K+ job openings at Dutch startups.

Try advanced searches to  
find your next dream job:

“use the filters for job functions  
or advanced searches via the  
search bar”

» Visit  
[startupjobs.techleap.nl](https://startupjobs.techleap.nl)

The screenshot displays the homepage of startupjobs.techleap.nl. At the top, it says "Find the job you love" and "Explore thousands of career opportunities on the Netherlands' largest startup job board." Below this, it shows "930 Companies" and "34 Jobs". A search bar is present with the placeholder text "Search in companies and jobs..." and a "Search →" button. A tip below the search bar reads: "Tip: You can now search within our techleap 'programs' and 'regional partners'". On the left side, there are filter options: "Showing 34 jobs", "Clear filters (5)", "Programs & Partners", "Companies", "Locations", and "Job Functions". The "Job Functions" filter is expanded, showing a list of categories with counts: Design (34), Software Engineering (6), Product (5), IT (1), Other Engineering (1), and Sales & Business Development (1). The main content area displays a grid of job listings, each with a company logo, name, job title, and location. The listings include: Mendix (PreSales UI/UX Specialist, Rotterdam, Netherlands), Mapiq (Lead Product Designer, Remote), Yuki (Creative Designer, Rotterdam, Netherlands), PHYSEE (Front-End UX/UI Developer, Delft, Netherlands), IMSystems (Mechanical Design Engineer (EN), Delft, Netherlands), HousingAnywhere (UX Researcher, Rotterdam, Netherlands), Pararius (UX Designer), Hardt Hyperloop (Graphic Designer), and Paladin Studios (Game Designer).

# 6

# Methodology



# How we arrived at the final dataset.

Starting point of **36.5K** businesses with an office in the Netherlands on the [Techleap.nl Startup Finder](#), which is powered by Dealroom.

These companies were detected via the methods described in this section.

Of which **11K** **verified, homegrown** startups, scaleups and grownups.

Of which **6K** homegrown startups, scaleups and grownups with employment data.

- Verified means manually verified to qualify as a startup.
- Homegrown companies = founded in, and current HQ in the Netherlands.

Removed: companies without employee data or <2 employees (micro-startups).

**Scope of this report.**

# What is a startup?

The word *startup* is often used and seldom understood.

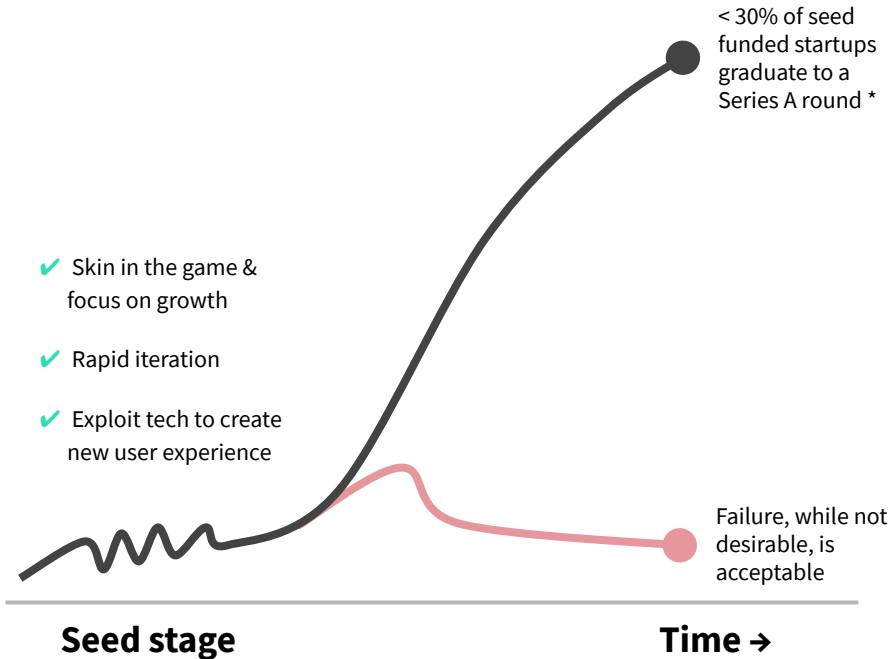
“A startup is a company designed to grow fast” wrote [Paul Graham](#), the legendary startup builder, investor and co-founder of Y Combinator. Notice the absence of the word “tech”. This is deliberate:

*“Being newly founded does not in itself make a company a startup. Nor is it necessary for a startup to work on technology, or take venture funding, or have some sort of “exit.” The only essential thing is growth. Everything else we associate with startups follows from growth.”*

At Dealroom, we’ve found this the most useful explanation of the term startup.

What about tech? Indeed, most startups are tech enabled. But so are lots of companies. Many traditional companies work more deeply on technology than the majority of startups. When talking about “technology” in the context of startups, we actually mean information-age technologies (internet, software, AI, algorithms) that can enable companies to decouple output from costs and achieve non-linear growth. The real common denominator is not tech, but the intention to scale very rapidly.

# What makes startups so effective at innovating?



\* for instance, see [Journey to Series A](#) report.

## Where the data comes from.



### AGGREGATING PUBLIC DATA

Extensive manual research, powered by machine learning



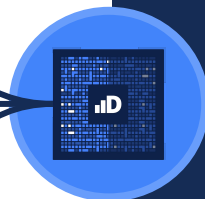
### LOCAL APIs & PARTNERSHIPS

Official local data, knowledge & sources in the Netherlands.



### COMMUNITY SOURCED

Data submitted by startups, angels, VC, accelerators, universities, regional development banks, etc



## The Dealroom API.

The set of companies in the report is sourced from the Techleap.nl Finder [finder.techleap.nl](https://finder.techleap.nl). This is an open access database, powered by Dealroom. Dealroom's proprietary database and software aggregate public information via machine learning and APIs. This includes the Dutch Chamber of Commerce, news flow, and user-generated data verified by Dealroom. All data is verified and curated with an extensive manual process.

Please visit [dealroom.co](https://dealroom.co) or contact [support@dealroom.co](mailto:support@dealroom.co) for more info.

# Definitions.

## Companies

A startup is a company designed to grow fast. Generally, such companies are VC-investable businesses. Sometimes they can become very big (e.g. \$1B+ valuation). When startups are successful, they develop into scaleups (>50 people), grownups (>500 people) and result in big companies, like Adyen or Picnic. In this report, the term “tech ecosystem” refers collectively to the startups, scaleups and grownups headquartered in the Netherlands. Only companies founded in or after 1990 are included in this report. This report sometimes refers simply to startups as a container for startups, scaleups and grownups.

## Jobs data

The words “jobs” and “employees” are used interchangeably. Number of jobs represent the total number of employees at homegrown startups. It is assumed that Netherlands-based employees work at the company’s headquarters. Employees not based in the Netherlands are not included.

The number of jobs is sourced from publicly available data including company statements, professional social media and interviews. This report counts all jobs at startups, not just tech jobs, (incl. mechanics, receptionists, concierges, helpdesk, ...). However, gig workers (e.g. riders, babysitters, ...) are not counted. Tech jobs at companies not covered in the report are not counted.

## Venture capital

Investment numbers refer to rounds such as Seed, Series A, B, C,...late stage, and growth equity rounds. Venture capital investment figures exclude debt or other non-equity funding, lending capital, grants and ICOs.

Buyouts, M&A, secondary rounds, and IPOs are treated as exits: excluded from funding data. Additional information can be found on Dealroom’s knowledge base [here](#).

Investment rounds are sourced from public disclosures including press releases, news, filings and verified user-submitted information

## Valuation

The combined valuation of startups based on their market cap or latest transaction value. Transaction value is realised from exit or implied unrealised valuation from the latest VC round, which is either announced or estimated by Dealroom based on market-based assumptions for dilution.

## Impact

We consider impact startups to be companies that address one or more of the UN Sustainable Development Goals (SDGs). A detailed methodology of Dealroom’s impact classification is provided on the [Impact Database](#).



# Startup sectors.

**Ecommerce** Online retail, connecting buyers to sellers and products on shopping sites and digital marketplaces.

**Gaming** Startups involved in the development, marketing, and monetisation of games (video games, online games, board games...)

**Foodtech** Startups addressing agrifood (from production to distribution), innovating on the products, distribution, marketing or business model.

**Education** Startups developing solutions, software and tools designed to enhance teacher-led learning in classrooms and improve students' education outcomes

**Energy** Startups working towards transitioning to sustainable energy, making our energy consumption more green and more efficient, solutions for recycling and handling waste.

**Fintech** Computer programs and other technology used to support or enable banking and financial services. Technology and innovation that aims to compete with traditional financial methods in the delivery of financial services.

**Security** Cyber security or information technology security are the techniques of protecting computers, networks, programs and data from unauthorised access or attacks that are aimed for exploitation.

**Semiconductors** Startups developing innovative semiconductors (chips), working on processors, chips for sensors, chips for the automotive sector, AI chips, IoT chips, data centre chips...

**Enterprise software** Startups developing computer software designed to satisfy the needs of an organisation rather than individual users.

**Transportation** Startups developing solutions, software, tools and machines used to solve problems or improve conditions in respect to the movement of people and goods

**Healthtech**, or digital health, uses technology (databases, applications, mobiles, wearables) to improve the delivery, payment, and/or consumption of care, with the ability to increase the development and commercialisation of medicinal products

**Real estate** Real Estate tech or PropTech (property technology) is the use of information technology to help individuals and companies research, buy, sell and manage real estate

**Travel** Startups developing services and products focused on travel and tourism, including booking services, search and planning platforms, on-demand travel, and recommendation sites.

**HR Tech** Startups developing solutions, services & software designed to improve the recruitment process within a business or for individuals seeking a job.

**Robotics** Startups dealing with the design, construction, operation, and use of robots, as well as computer systems for their control, sensory feedback, and information processing

**Marketing** Marketing technology (also known as MarTech) describes any number of systems and tools that help marketers better engage with potential and existing customers.

**Event Tech** Startups developing solutions and technologies helping you plan, manage, and organise data when putting on an event (conference, wedding, party, etc)

**Legal** Legal technology, also known as Legal Tech, refers to the use of technology and software to provide legal services.

**Telecom** Startups developing solutions aiming at disrupting the telecommunications industry: startups offering mobile plans, internet subscriptions, better communication services...

**Kids** Startups developing products, solutions and tech for children or to help parents with their children

**Sports** Startups developing tech products and services designed to improve sporting performance, provide sporting activities and engage sports fans.

**Media** Media technology is any hardware, software, or tool that is used to compose, create, produce, deliver and manage media including audio, video, images, information, interactive media, video games, virtual reality, and augmented reality environments.

Put your startup on the map.

Let the best VCs find you

Attract top talent

Contribute to an open dataset

» Claim your profile

The screenshot shows a detailed profile for Lightyear, an electric car startup. The profile includes a logo, a description, location, website, and various industry tags. It also features a navigation menu, a related landscape section, an analytics dashboard, and a company information section.

**Lightyear** ✓  
The electric car that charges itself  
Helmond Noord-Brabant (HQ)  
https://www.lightyear.one/

**Tags:** B2C, manufacturing, energy, transportation, clean energy, vehicle production, maintenance

**Categories:** sustainable development goals, automotive, solar energy, electric vehicle  
sustainable cities & communities (#11), affordable & clean energy (#7), climate action (#13)

**Navigation:** OVERVIEW, SIMILAR COMPANIES, ANALYTICS, TEAM (9), NOTES, JOBS (61), INNOVATIONS (0)

**RELATED LANDSCAPES AND LISTS**  
Dutch Funding Landscape - H1 2021 » Transportation  
Includes logos for Lightyear, dott, GO+, felyx, and shyppl.

**ANALYTICS**  
Employees | Web visits  
Line chart showing growth from Sep 2019 to Sep 2021YTD.

	CURRENT	GROWTH RANK
Web users	109K monthly visits	16,509th (top 10%)
App users	-	-
Social engagement	8K followers	-
Employees	262	10,609th (top 5%)
Top countries	-	-

**COMPANY INFORMATION**

Launch date	Nov 2016
Employees	262 people
Ownership	angel, venture capital
Firm valuation	€132—198m (Dealroom.co estimates Sep)

**TECH STACK**

