TAMPERE REGION STARTUP STUDY 2023, 31ST JANUARY 2024 (RESULTS)

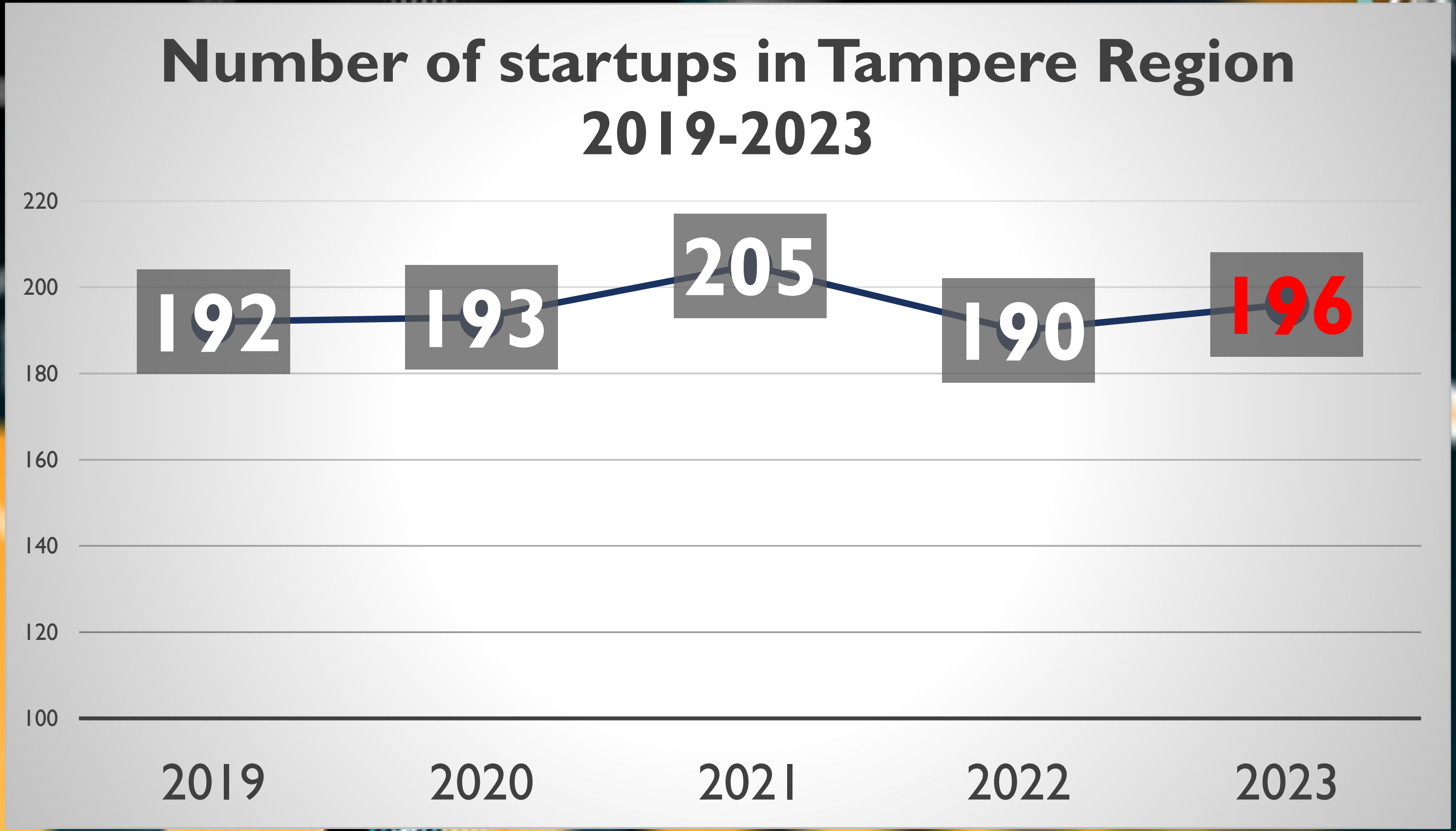
SUMMARY

1) NUMBER OF ACTIVE STARTUPS
2) NUMBER OF STARTUPS BORN
3) SPECIAL FEATURES OF 2023

NUMBER OF ACTIVE STARTUP COMPANIES

Q4/2023

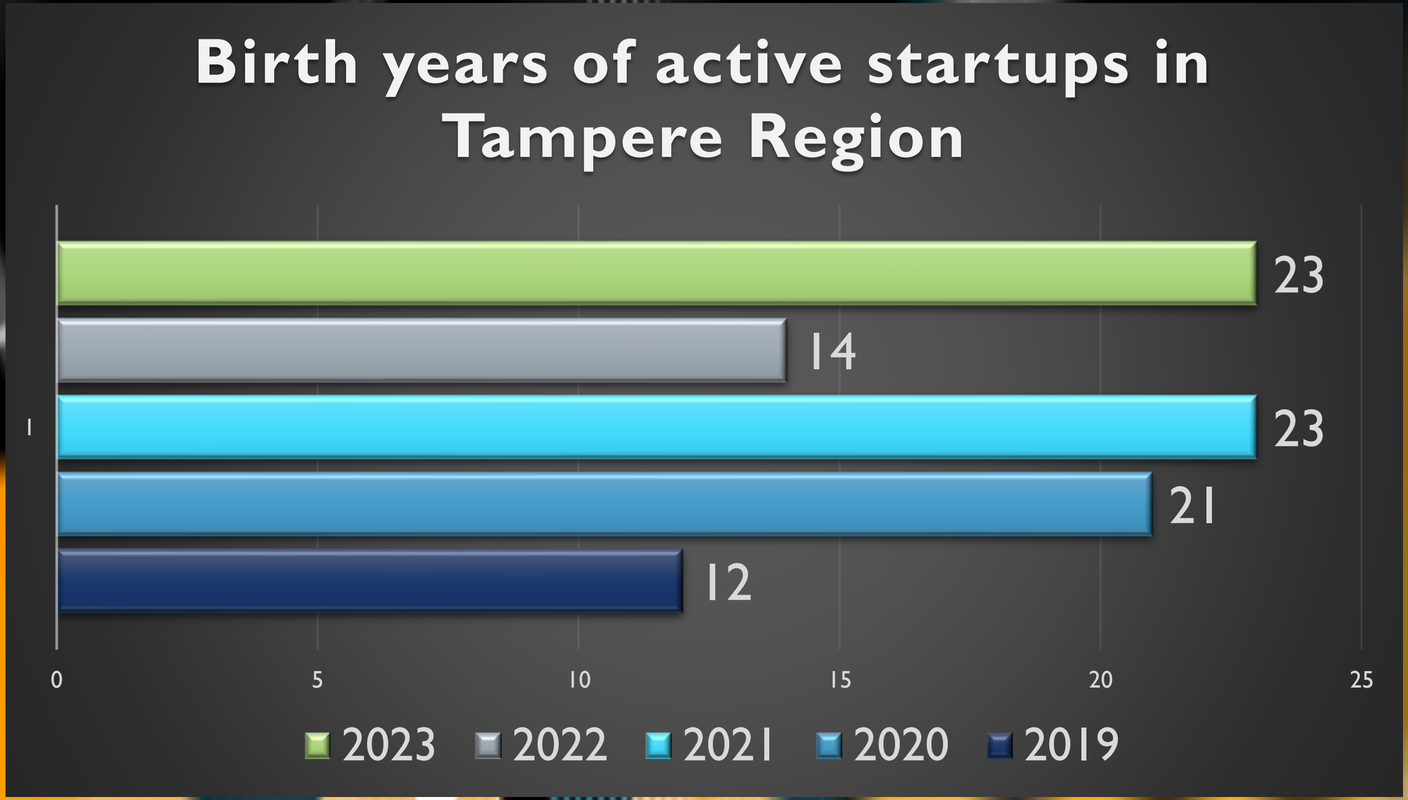
- NUMBER OF ACTIVE STARTUP COMPANIES IN TAMPERE REGION (2023): 196, OF WHICH 47 ARE SCALEUPS
- GLOBALLY, THE NUMBER OF STARTUPS HAS DECREASED DUE TO THE CRISES, BUT IN TAMPERE THE NUMBER HAS REMAINED HIGH



NUMBER OF STARTUP COMPANIES BORN

Q4/2023

- NUMBER OF STARTUP COMPANIES BORN IN TAMPERE REGION (2023): 23
- GLOBALLY, THE NUMBER OF NEW STARTUPS HAS DECREASED DUE TO THE CRISES



SPECIAL FEATURES OF THE 2023 REPORT: CRISES CONTINUE

The study was carried out in the autumn term of 2023.

The crisis situation (rising inflation and slowing down of the global economy) is also visible in startup companies.

The number of startup companies in Tampere region has remained high.

Despite the crises of recent years, the range has been 190-205 startups.

Globally, the birth of startups has been up to -30%, e.g. in Israel (Haaretz, 2022) and in the USA: "2023 was an 'extinction' level year for tech startups" (CNN, 2023).

INTRODUCTION

I INTRODUCTION

2) DEFINITION OF A STARTUP COMPANY

3) STARTUP ECOSYSTEMS IN GENERAL

4) THE STARTUP ECOSYSTEM OF TAMPERE REGION

STARTUP REPORT 2023 – INTRODUCTION

- **Research and evaluation overview of the current situation of the region's startup ecosystem**
  - Based on the acquisition of data (companies' responses and analysis based on them, high response rate)
  - An annual follow-up
- **The main goal is to find out the number of active startup companies in the Tampere region and to analyze current information on the development and growth situation of companies**
  - To be used in the development of business services aimed at growth companies, such as business and financial advice, development services and growth ecosystem development measures.
  - Special attention to the operating environment of the Tampere Region and the Platform6 startup hub.
- **The summarized public results are available to all ecosystem actors, and this presentation material may be distributed freely, as long as the commissioner and author are mentioned at the same time**
  - The report for 2023 has been prepared on the order and commission of the city of Tampere, and it has been carried out by Tommi Uitti / Tampereen startuptukiyhdistys ry
  - Thanks to the authors of previous years' startup surveys, partners and ecosystem developers for their kind help!

DEFINITION OF A STARTUP COMPANY

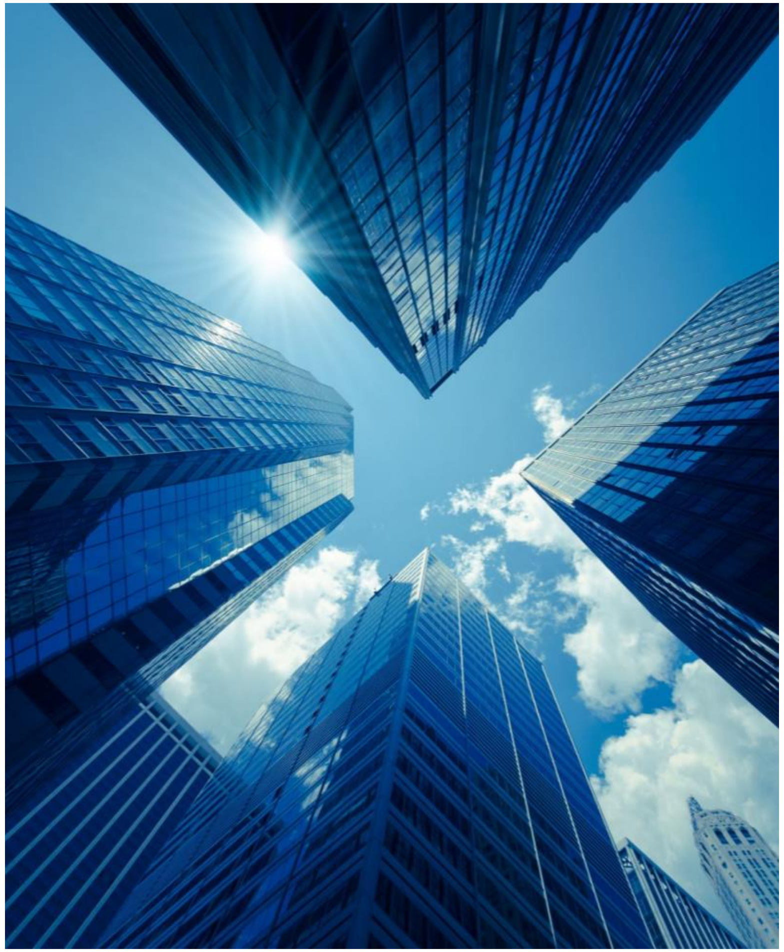
Definition used

- **1. Employability:** Employs 1-49 employees, and has also either joined the employer register or the company has a team where more than one person works.
- **2. Company form:** Is a limited company and privately owned. Subsidiaries of groups or companies owned by the state and municipalities are not taken into account.
- **3. Innovativeness and scalability:** Develop an innovative product or service with high business risk. Looking for a scalable and repeatable business model.
  - Companies that have started to develop a new innovative and scalable business model instead of their previous more established business are also taken into account.
- **4. Growth orientation:** Actively seeks internationalization and strong growth.
- **5. Financing potential:** The company has either received risk financing or is of interest to risk financiers.
- **6. Age of the company:** 0-10 years. Some of the scaleup companies have been included as successful growth companies and because of their continuous growth type nature.

STARTUP ECOSYSTEMS IN GENERAL

- Ecosystems consist of networks between economic development strategies, business activities, and innovative initiatives that increase employment and city vitality (Robertson et al. 2020).
- In the startup ecosystem, various stakeholders establish organizations to build an infrastructure base to support and establish startup companies, promote the development of the national product, and increase jobs on a large scale (Zhavoronkova et al. 2020).
- Startup and innovation ecosystems require the interaction of universities and research institutes as well as business activities to support them.

THE STARTUP ECOSYSTEM OF TAMPERE REGION



- **The region's startup ecosystem is in the activation phase of its development**
  - The public sector funding compensates for the market shortage of early-stage services in particular
  - The city of Tampere is a powerful activity developer and financier, www.tampere.fi
- **The flagship project of the Tampere startup ecosystem is the Platform6 startup hub**
  - The goal is to accelerate the growth and internationalization of startup companies and to attract investors' interest in startup companies located in Tampere
  - Operated by Tampere Startup Hub: www.platform6.fi
- Many important startup ecosystem actors in Tampere: Business Tampere, Tampere University community/Tamlink, etc.

RESULTS OF THE SURVEY

1) NUMBER OF STARTUP COMPANIES IN MORE DETAIL

2) CHANGES IN STARTUP COMPANIES IN RELATION TO 2022

RESULTS 1/2 OF THE SURVEY: THE NUMBER OF STARTUP COMPANIES IN MORE DETAIL - Q4/2023

After the inspection, it was found that there are 196 active startup companies in the Tampere region.

- The names of these companies are published at the end of the report as an appendix (APPENDIX 1).
- Companies not classified as startups are not disclosed in this report.
- The result number of startup companies in the 2022 startup report was 190.

The survey identified 47 scaleup companies.

- Definition: at least to expansion stage (based on the turnover data of 2022, companies that have generally grown to at least to 500 000€ level in annual turnover) and, as a rule, have been operating for at least 5 years.

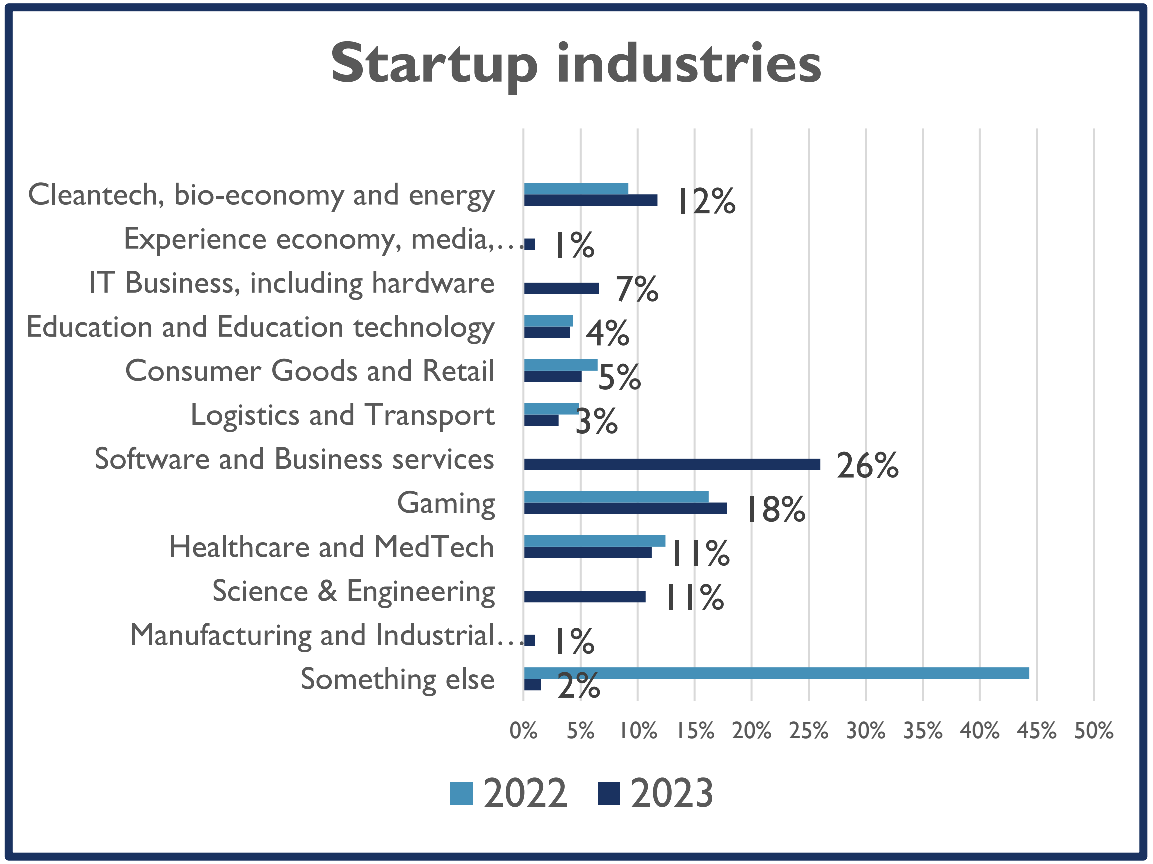
RESULTS 2/2 OF THE SURVEY:
CHANGES IN STARTUP COMPANIES IN RELATION TO 2022

- Change in ownership: 3 companies (from an exit-startup point of view / company purchase - Fabric AI Oy/ Visma Solutions Oy, Movendos/Oiva Health Oy, Nsion/Modirum Security Technologies Oy)
- *Negative factors* affecting the number of startup companies (changes: year 2022 -> year 2023):
  - **Moved/relocated from the region**: 1 (one) company (turnover was around 42 000 euros)
  - **Operations officially ceased (e.g. liquidation / bankruptcy):** 19 companies
  - **The operation is no longer startup-type or outdated beyond the review focus**: 25 companies
  - A total of 45 companies left the startup ecosystem => 20% turnover is normal turnover for startups (in relation to 2022)
- *Positive factors* affecting the number of startup companies (changes: year 2022 -> year 2023):
  - **New startup companies that have moved/located in the region (identified):** 3 companies (NayaDaya Analytics Oy, Codease Oy, Tabnomous; the last two located in Finland from abroad and were founded in Finland, so they are also counted among new startup companies)
  - **New startups born**: 21 companies (Authbound Oy, Aveksana Oy, Biomark Health Oy, Buffer Solutions Oy, Entail Oy, Exercio Oy, Kiki's Home Box Oy, KiwiMedi Oy, Ocricom Oy, Optimo Systems Oy, Orbican Oy, Pixelflake Oy/Webber, Quotallogic Oy, Ravine Interactive Oy, Robosharing Oy, Royal Fork Oy, Rxions Oy, Seafarix Oy, Visage Games, Winse Power Oy, XChi Oy/SoundxVision)
  - **Operations changed to startup type or newly identified companies**: 27 companies

RESULTS OF THE SURVEY

BASIC INFORMATION

INDUSTRIES OF STARTUP COMPANIES (Q2) (2023 *)



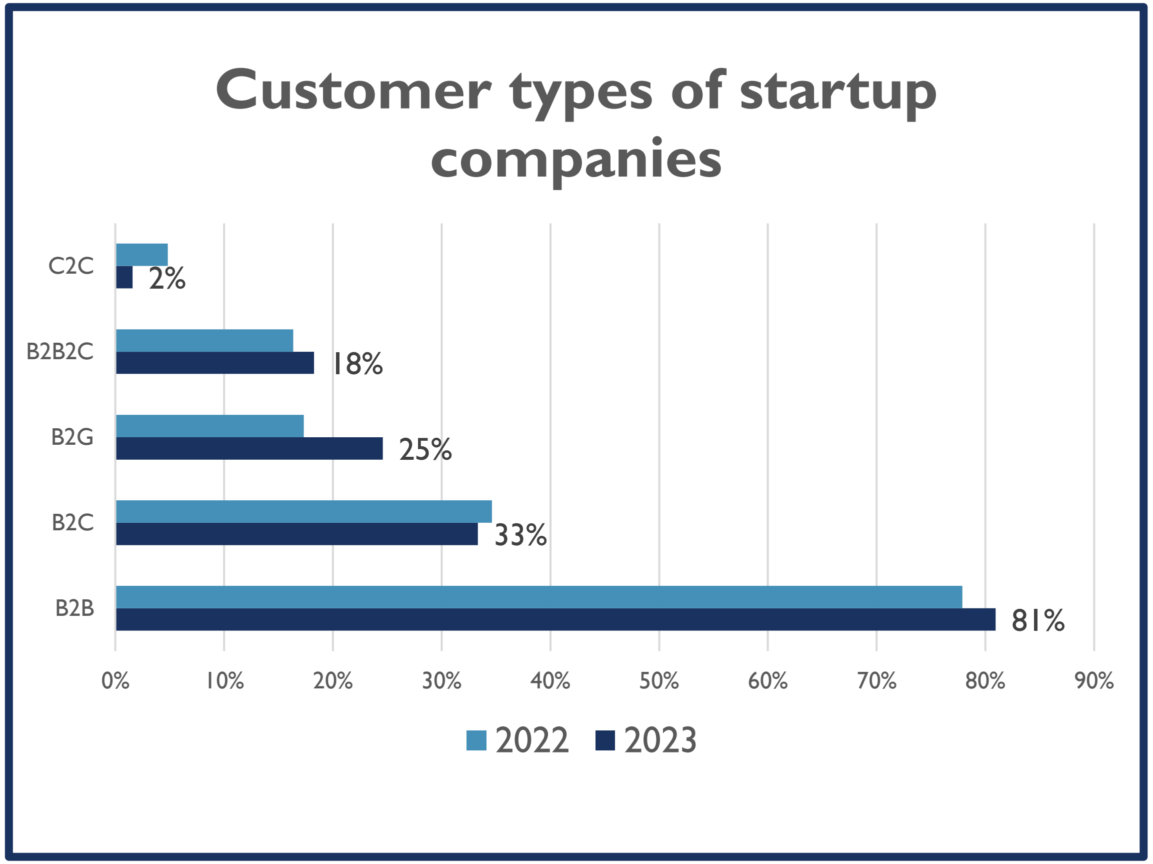
TOP5 industries / company distribution (2023) (light blue 2022, dark blue 2023)

- Software and business services: 26%
- Gaming: 18%
- Cleantech, bio-economy and energy: 12%
- Healthcare and MedTech: 11%
- Science & Engineering: 11%

- **Conclusions:** Software, gaming and cleantech, bio-economy and energy are startup growth areas. No direct comparability to year of 2022, because the categories were modified (software and hardware categories separated from each other)

(*) TOL classification does not work among startups. The division was made according to FiBAN's data collection categorization, www.fiban.org/data

CUSTOMERS OF STARTUP COMPANIES (Q7)

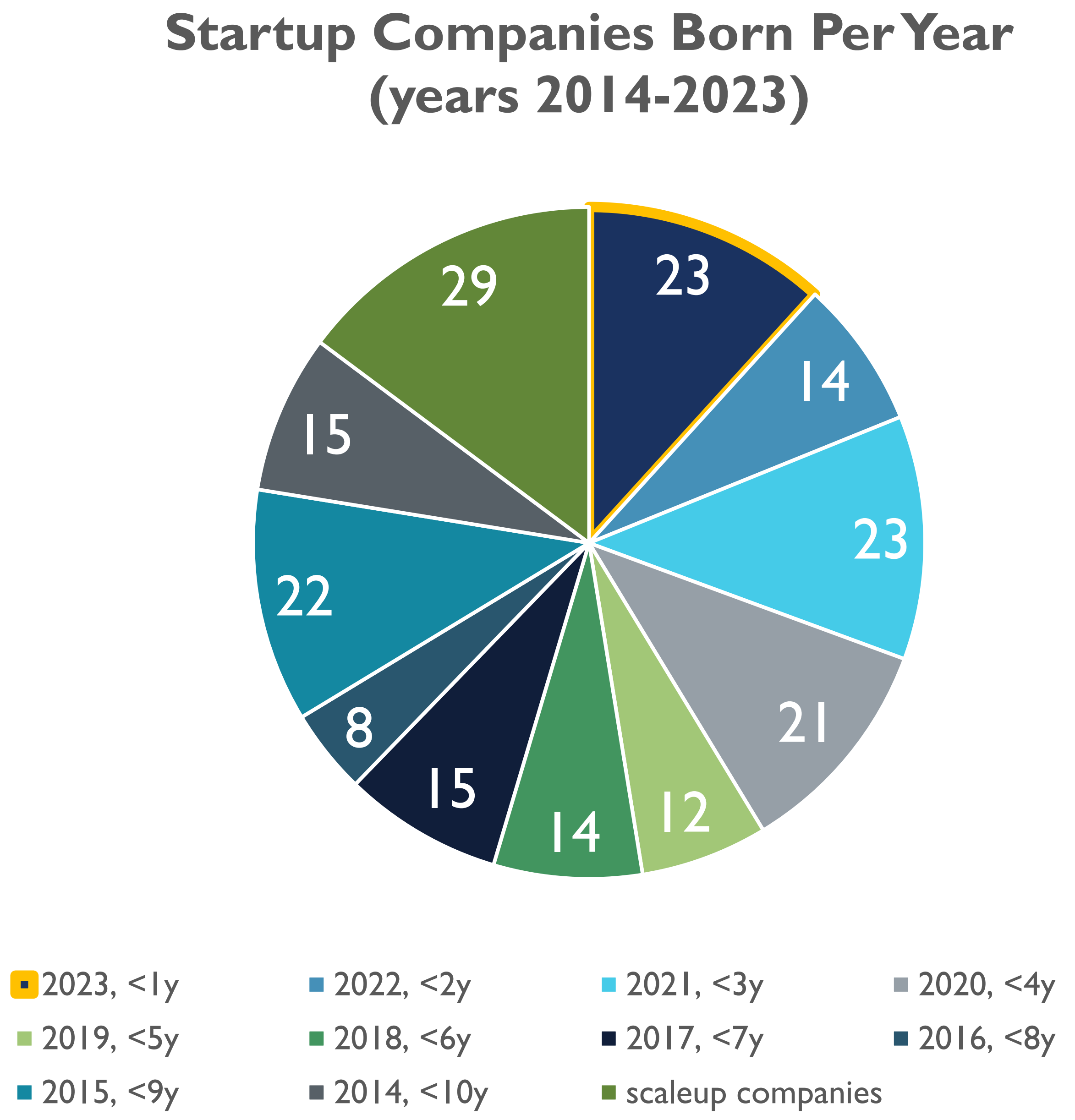


Summary: The company has been able to choose several options, each option is compared in relation to the group of companies (light blue 2022, dark blue 2023)

- 51% B2B
- 21% B2C
- 16% B2G (Business to Government)
- 12% B2B2C
- 1% C2C (Customer-to-Customer)
- B2G companies are mainly energy, education and health technology companies, but there are companies from several industries
- **Conclusions:** In the distribution of customers, B2C and B2B emphases have remained more or less the same. An increasing number of companies think that they will also find customers in the public sector (B2G).

AGE DISTRIBUTION OF STARTUP COMPANIES 2014-2023

- Startups have been established relatively evenly over the years, e.g. year 2015, which has been the peak year in the entire measurement history.
- The number of births in 2023 is at least 23. Some of the startups born this year will not be recognized until the following year.
- Conclusion: In the years 2019-2023, there has been a new rise close to the level of startup births in 2015.



LOCATIONS OF STARTUP COMPANIES IN THE REGION (2023 *)

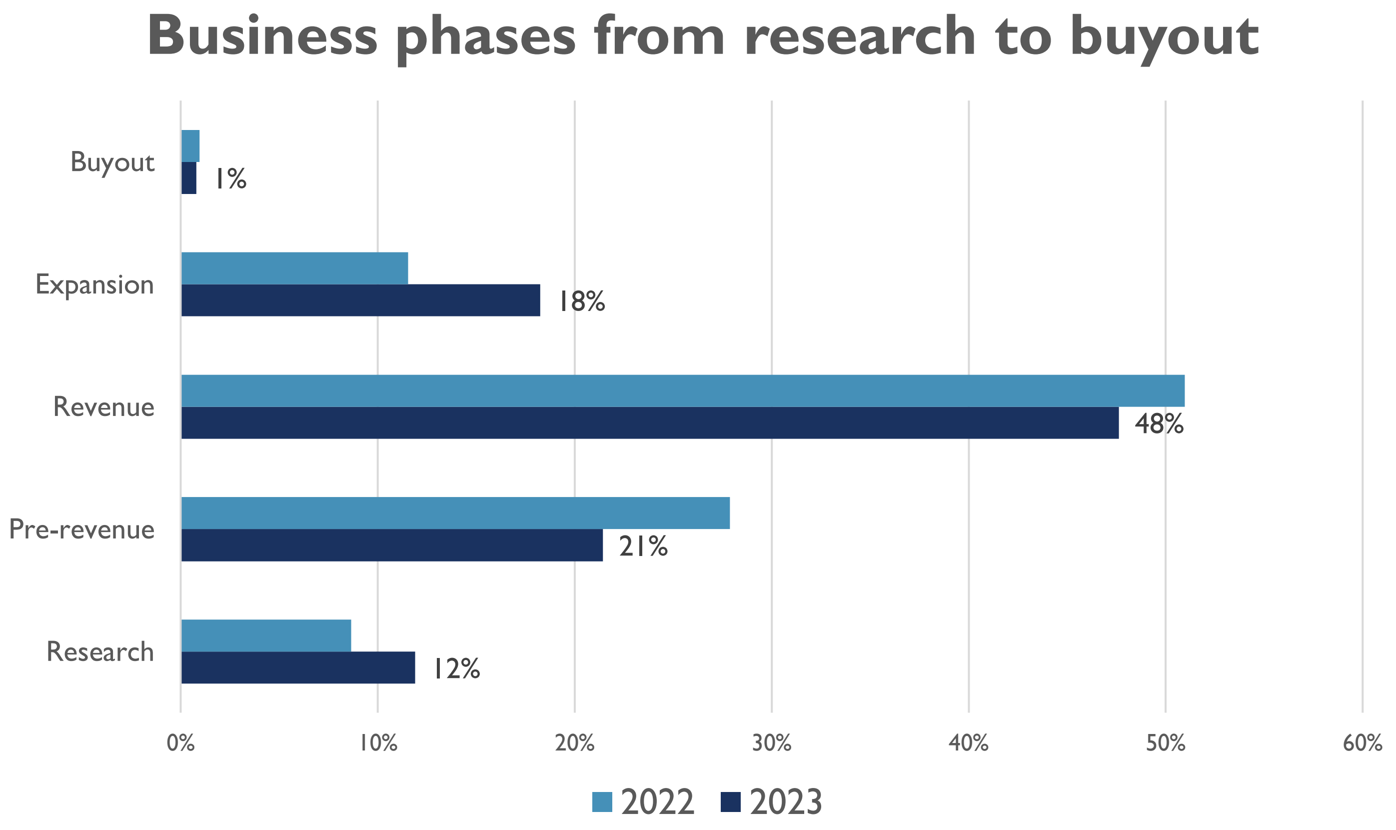
- **TAMPERE** 179 STARTUPS
  - BASED ON POSTAL CODES, MOST ARE LOCATED IN THE CENTRAL AREA OF TAMPERE (33100) AND HERVANTA 33720.
- **NOKIA** 3 STARTUPS (Prönö Enterprises Oy, Saunatemppeli Oy, UDT Technologies Oy)
- **LEMPÄÄLÄ** 2 STARTUPS (Finrenes Oy, Lakka Health Oy)
- **NOKIA** 1 STARTUP (Carbofex Oy)
- **PIRKKALA** 3 STARTUPS (Fitty Murmel Oy, StepOneTech Oy, Wield VR Oy)
- **YLÖJÄRVI** 8 STARTUPS (Arctic Studios Oy, Block Solutions Oy, Cirous Oy/Porkkanapankki, DTS Finland Oy, Kemion Oy, ITFox Oy/Tassuapu, Material Maintenance MaMa Oy, Playliner Oy)

* Location is evaluated primarily by postal address and domicile, and secondarily by company headquarters and based on the location of the majority of the staff. It should be noted that the locations are constantly changing and the up-to-date situation should be checked every year.

RESULTS OF THE SURVEY

BUSINESS, GROWTH AND FUNDING

BUSINESS PHASES OF STARTUP COMPANIES (Q15) (*)



Business phases of startup companies based on companies' own announcement: (n=126), (light blue 2022, dark blue 2023)

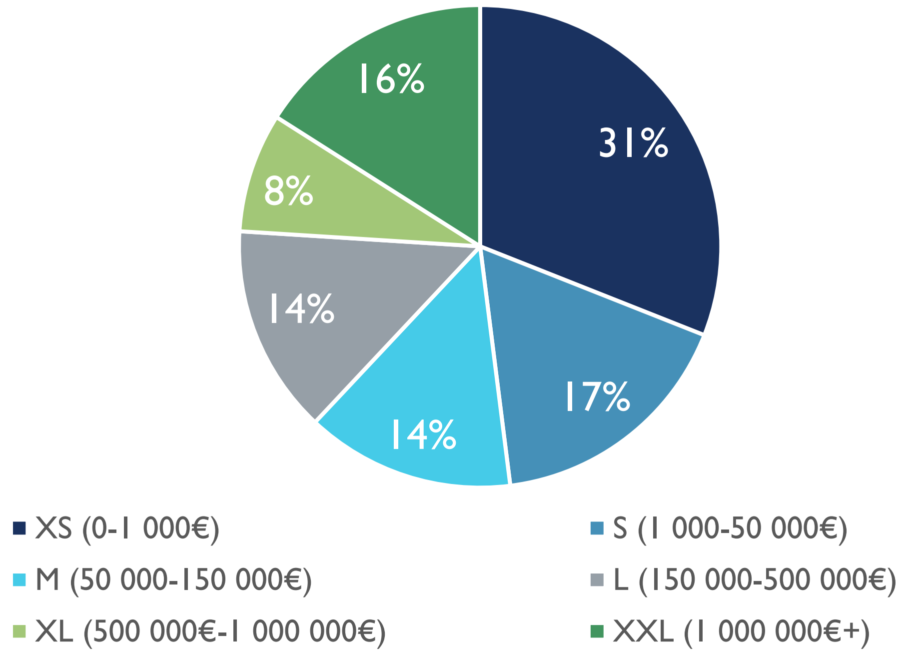
- 12% research
- 21% pre-revenue
- **48% revenue**
- 18% in the expansion phase
- 1 startup as buyout (FabricAI, the company's operation has been purchased)

Conclusion: Tampere has plenty of companies in the growth phase that set an example for startups in earlier startup phases.

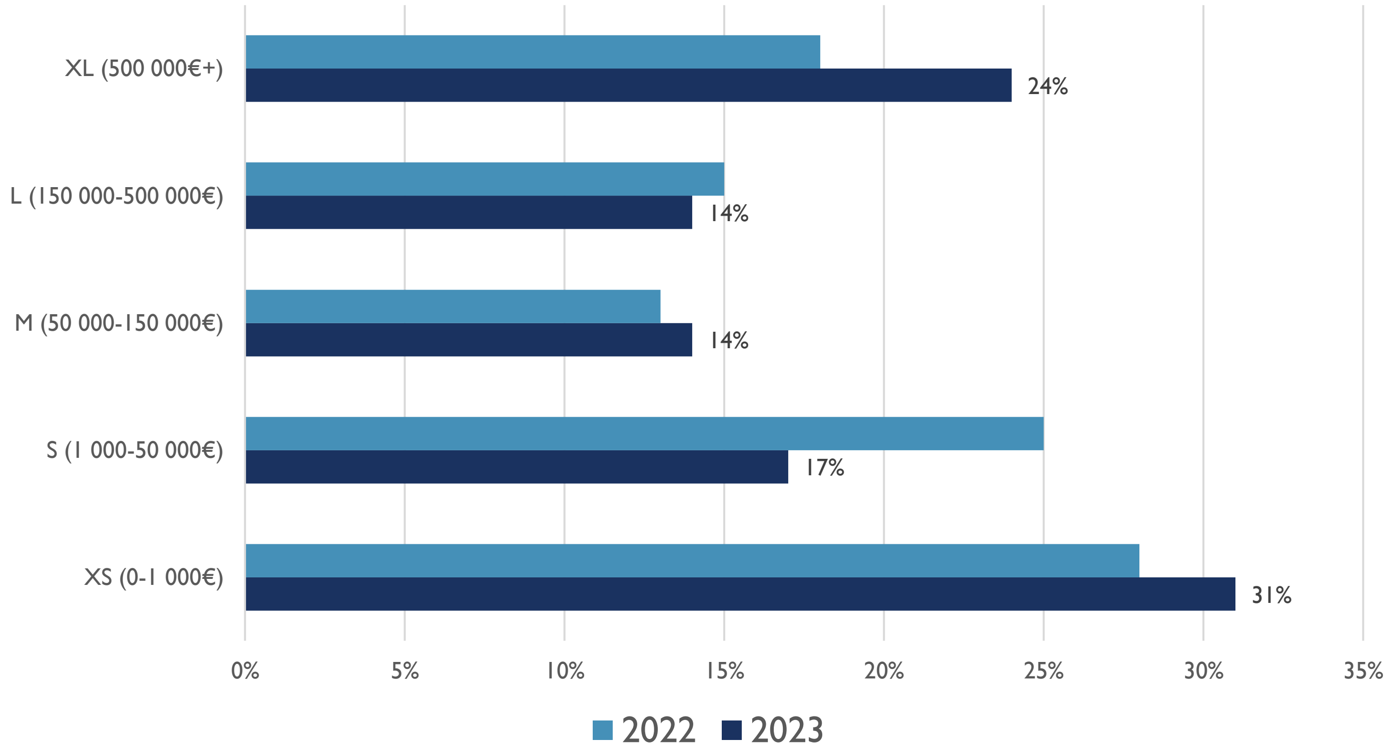
(*) Categorization made according to the division used by Business Finland

SIZE CATEGORIES OF STARTUP COMPANIES

Size categories of company revenue (2022)



Changes in size categories (2021-2022)



Conclusion: The comparisons have been made based on the 2022 financial statements. About a third of the companies are in the pre-revenue stage (turnover is still under 1 000€), half of the companies have annual turnover of less than 50 000€.

Conclusion: Some L and XL companies have grown to XL and XXL size categories, new XS companies have been born (light blue 2022, dark blue 2023).

TURNOVER AND EMPLOYMENT OF STARTUP COMPANIES

Startup phase and scaleup phases (2022)

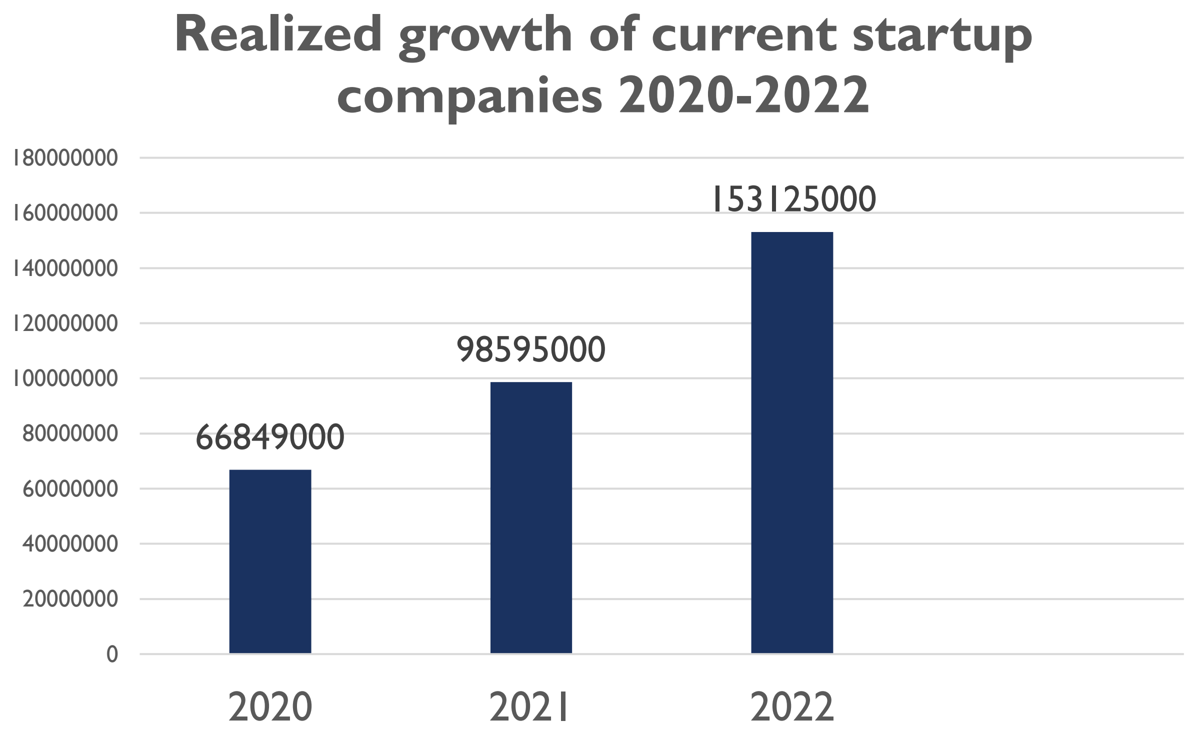
- Turnover of startup companies (149): 11 258 000 €
- Employment of startup companies (149): 370 person-years
  - Turnover / employee: 30 430 € / employee

- Turnover of scaleup companies (47): 141 867 000 €
- Employment of scaleup companies (47): 757 person-years
  - Turnover / employee: 187 410 € / employee

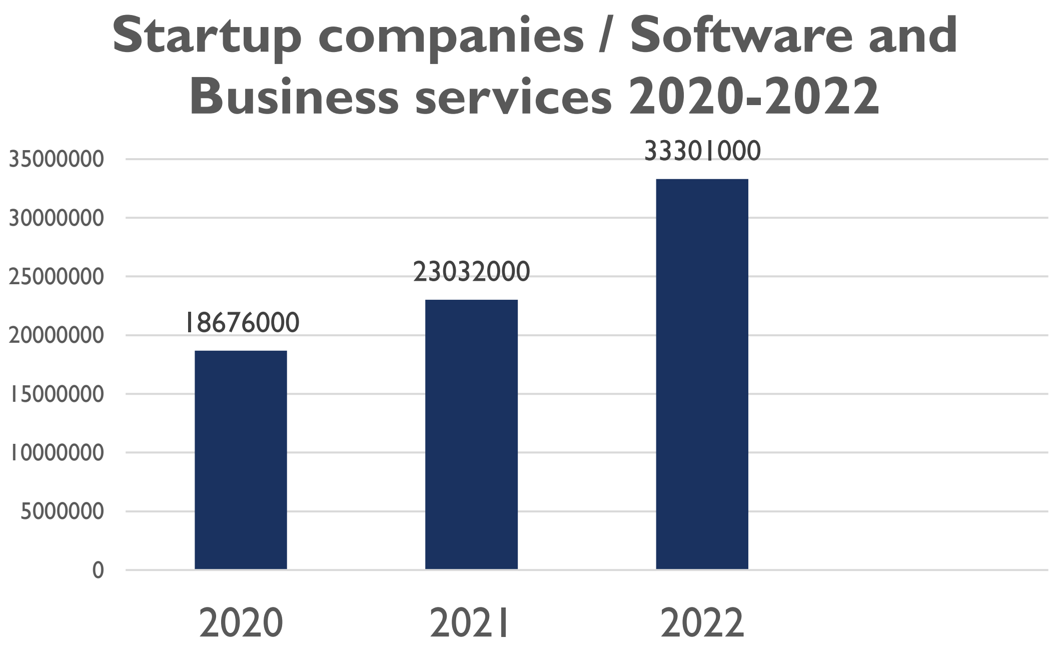
Total: Startup turnover and employees (2022)

- **Turnover of all startup companies: 153 125 000 €**
- **Employees of all startups: 1127 person-years**

REALIZED GROWTH OF STARTUP COMPANIES 2020-2022



An example from the software industry



Conclusion: Realized revenue growth: +129% (~1,3X) since 2020

Conclusion: Realized revenue growth: +97% (~1X) since 2020

POSITIVE OUTLOOK FOR STARTUP COMPANIES (Q9-Q11)

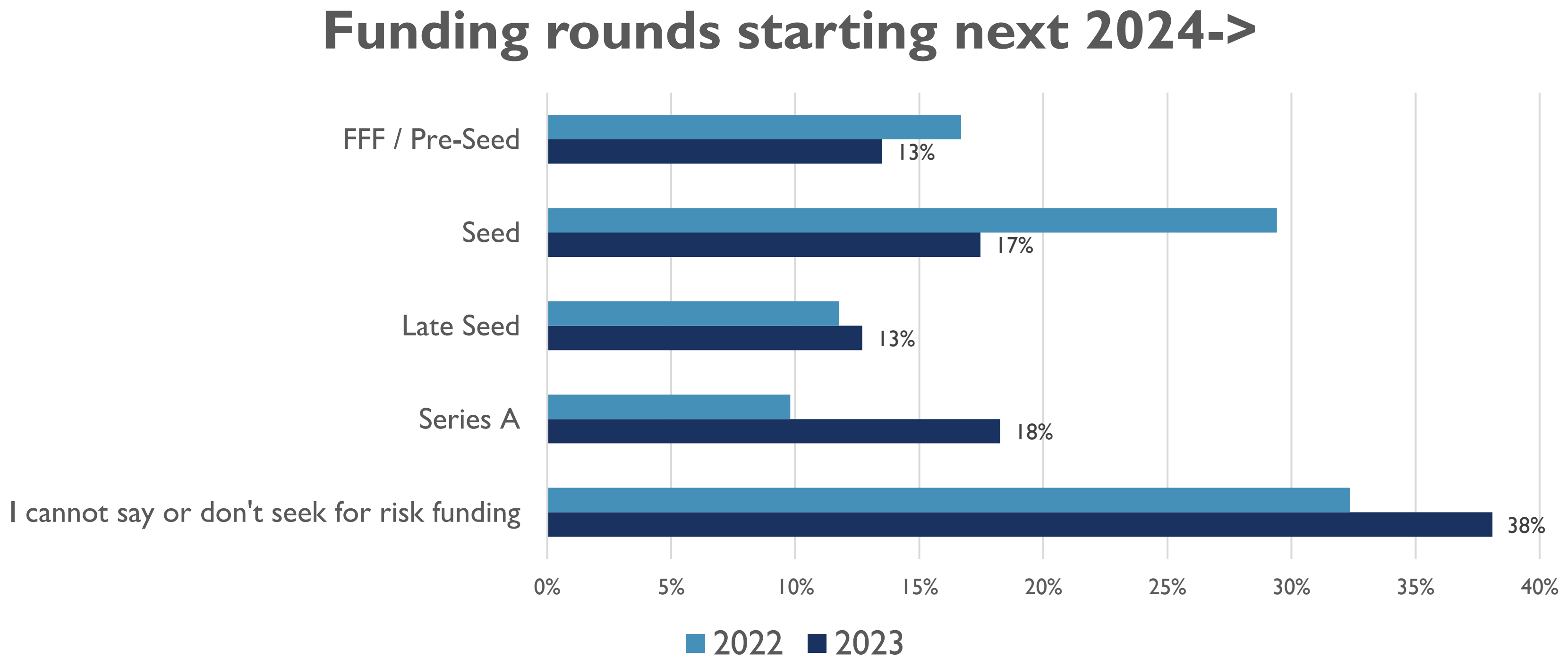
- Growth forecast, all sectors (2022 -> 2023):
  - **Revenue forecast: +37,8%**
    - *total about 22 831 000€ more turnover*
  - **Employment forecast: +47,2%**
    - *total about 295 new employees*
- Example of a rapidly scaling industry: Software and Business services companies
  - Growth forecast:
    +54,9% revenue growth during 2023

FUNDING ROUNDS OF STARTUP COMPANIES (Q20) (*)

Funding rounds of startup companies based on self-report: (n=126), (light blue 2022, dark blue 2023)

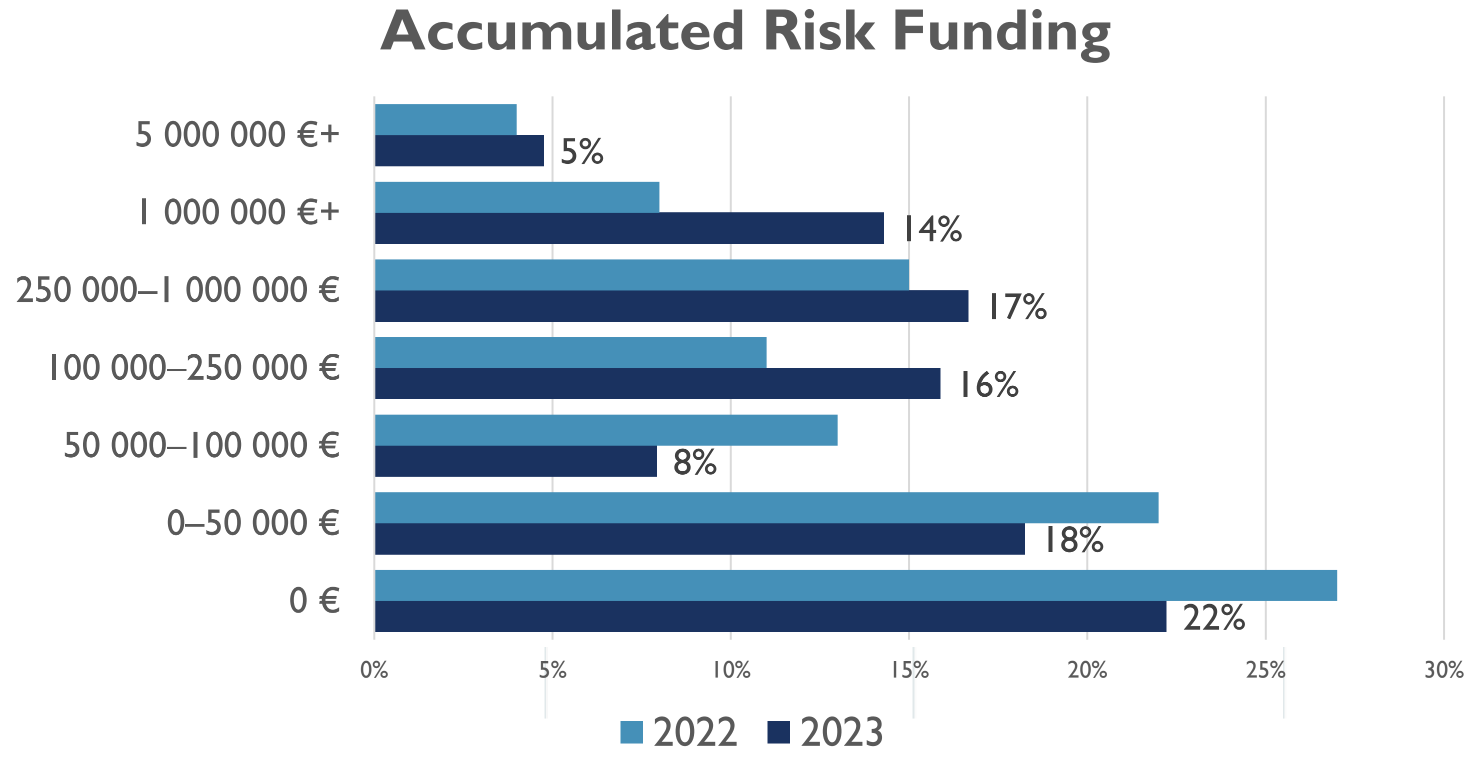
- 13% in Pre-Seed, 17% in Seed, 13% in the Late Seed and 18% in Series A round
- 38% of companies currently do not apply for external risk funding, which is slightly more than in 2022 (+5%)

Conclusion: The funding rounds are well balanced in relation to each other => Series A rounds increased – emphasized funding need and growth direction



(*) More information on the definition of funding rounds, especially the difference between Pre-Seed and Seed : https://www.brex.com/blog/pre-seed-vs-seed-funding-round-what-is-the-difference/

ACCUMULATED RISK FUNDING OF STARTUP COMPANIES (Q21)



The funding raised by startups over the years has grown and is now estimated to be well over 50 000 000M€+.

In addition to risk investments, this may also include other equity financing.

34 startups/27% of startups had a funding round open in 2023 (n=126)

- **Summary:** (light blue 2022, dark blue 2023)
  - 22% of the companies have not yet raised risk funding and 18% have started with a share of 0-50 000€, total 40% have collected less than 50 000€ in funding.
  - The shares of those who acquired more risk funding are distributed as follows for the entire startup population: 8% 50 000-100 000€, 16% 100 000-250 000€, 17% 250 000-1 000 000€ and 14% 1 000 000€+
  - Over the years, 5 companies have agreed on risk funding of over 5 000 000M€.

RISK CAPITAL INVESTMENTS IN STARTUP COMPANIES (2023)

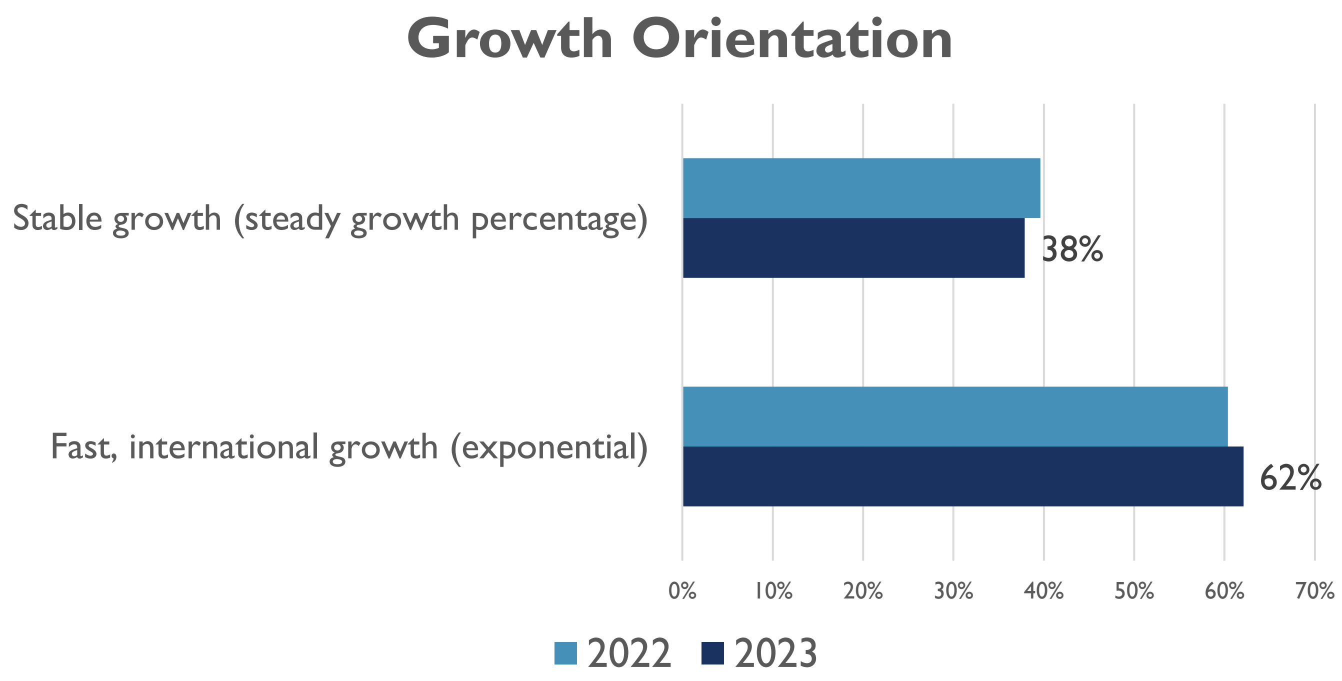
	Company	Company type	Funding round	Investment
	1	Startup	Seed	500 000€
	2	Startup	Seed	1 500 000€
	3	Startup	Late Seed	4 300 000€
	4	Startup	Pre-Seed	130 000€
	5	Startup	Late Seed	3 900 000€
	6	Startup	Pre-Seed	200 000€
	7	Startup	Late Seed	1 000 000€
	8	Startup	Pre-Seed	50 000€
	9	Startup	Seed	880 000€
	10	Startup	Pre-Seed	300 000€
	11	Startup	Pre-Seed	240 000€
	12	Startup	Pre-Seed	700 000€
	13	Startup	Seed	600 000€
	14	Startup	Seed	500 000€
	15	Startup	Pre-Seed	280 000€
	16	Scaleup	Late Seed	3 500 000€

- The number of companies that received investments and the level of funding rounds are higher than in 2022, total min 18 500 000€. Note! Publicized investments are only part of the financing received by companies, e.g. public financial instruments.

RESULTS OF THE SURVEY

GROWTH AND DEVELOPMENT POTENTIAL

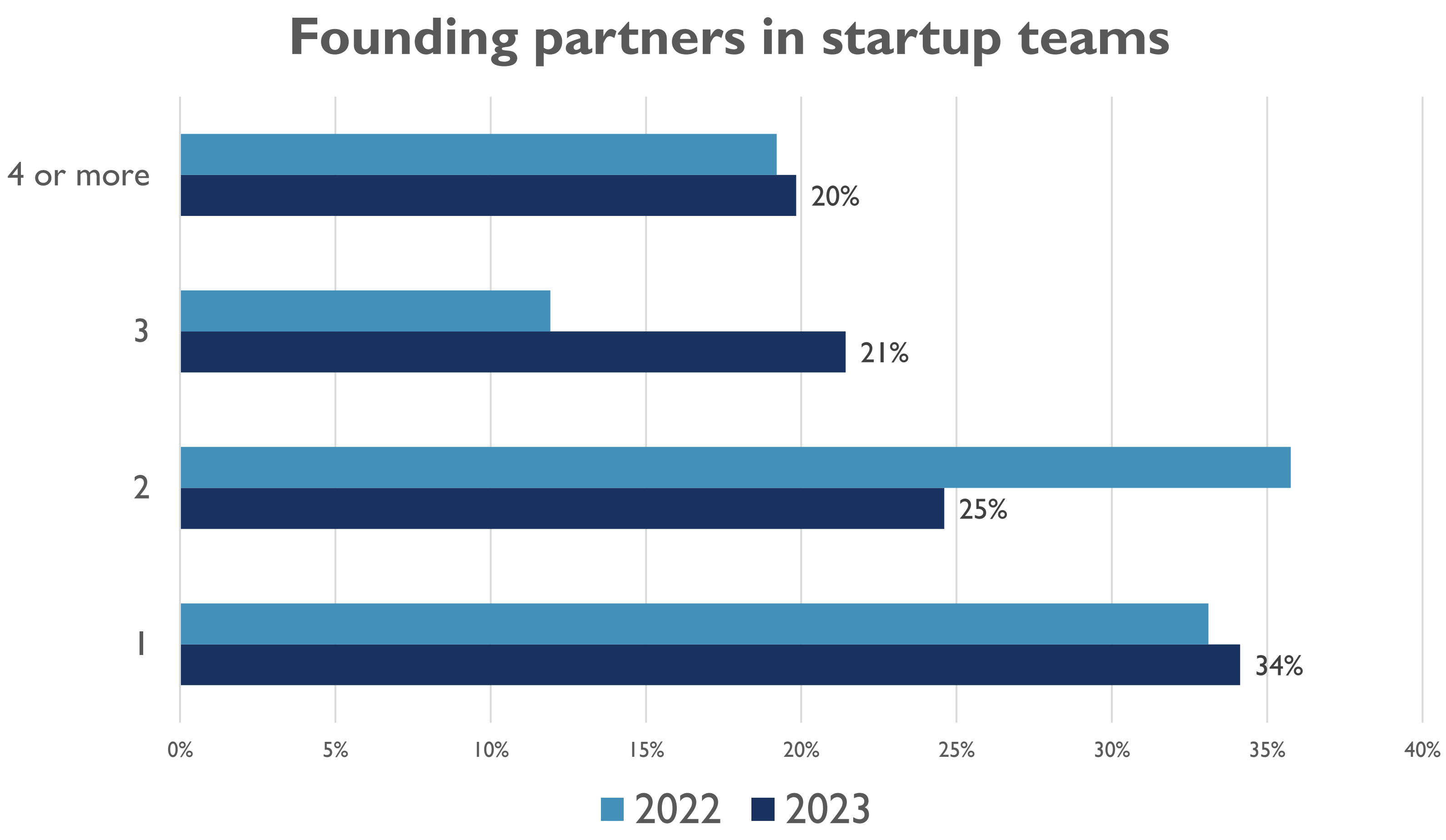
GROWTH ORIENTED OR NOT? (Q8)



- About 62% seek fast international growth, about 38% stable growth (or are forming new growth goals) (light blue 2022, dark blue 2023)
- Companies without a growth target are excluded from the result set of the report in accordance with the startup definition.

FOUNDING PARTNERS (Q5)

- In founding partners distribution, there has been an increase in founding teams of 3 people and a decrease of 2 people.
- It could be evaluated that building larger teams has been more successful than before.
- Conclusion: This indicates the constant need for team building, communities and matchmaking in the startup and growth phases of startup teams.



BACKGROUND VARIABLES: FOUNDERS / COMPANIES (Q6, Q12, Q13)

The companies have been founded by at least one person who:
- has not founded companies before (new entrepreneur), 59% of companies
- founded companies before (serial entrepreneur), 53% of companies

- female, 29%
- male, 89%

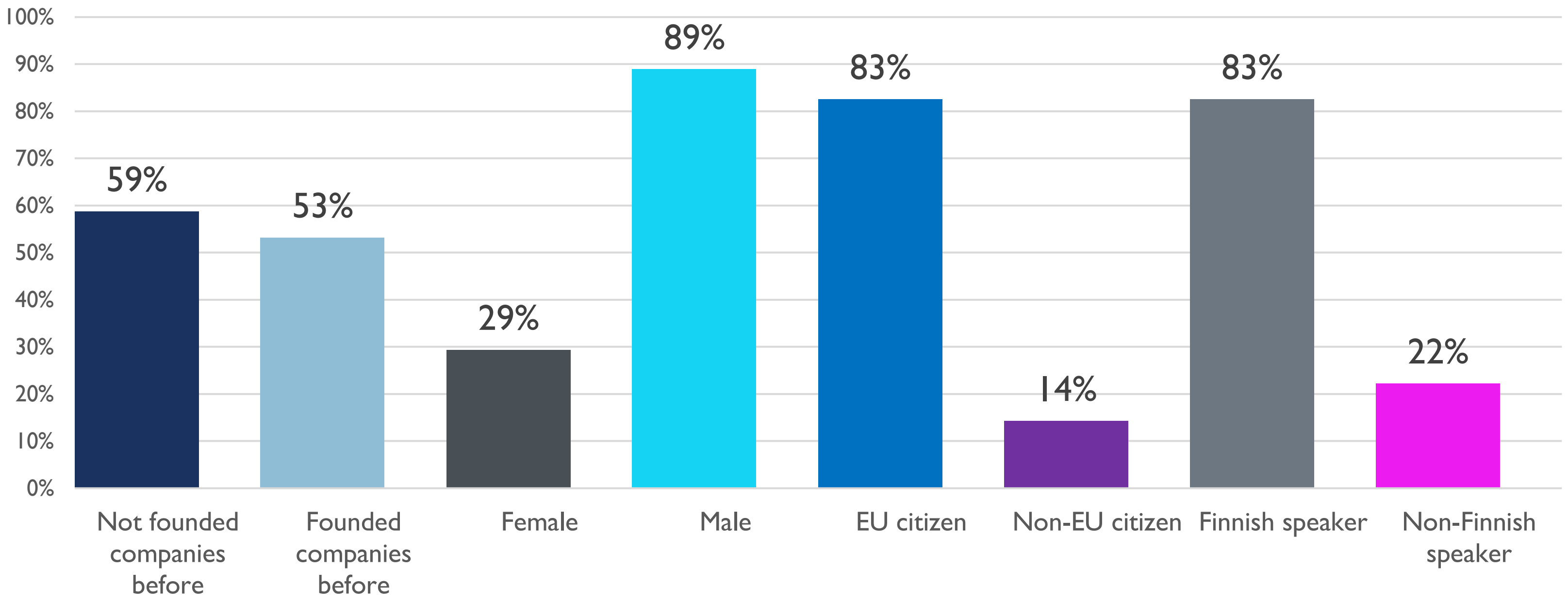
- non-EU citizens, 14%
- non-Finnish speakers, 22%

The company background:
- founded elsewhere in Finland, 8%
- came from abroad, 2%

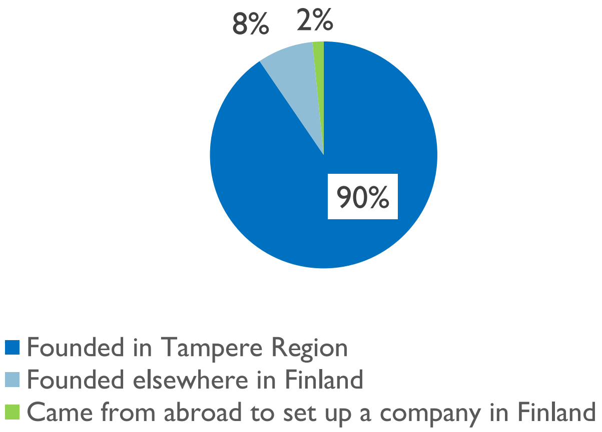
- English as the main working language, 53%
- Finnish as the main working language, 47%

(n=126), no comparability to the study of 2022 because the questions are new

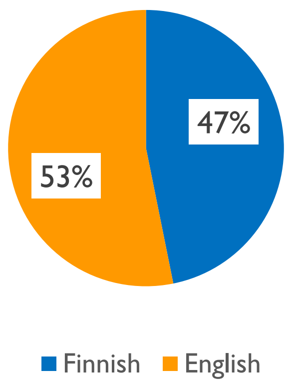
Company founders at the time of establishment by company-level



Where the company was established



Main working language



UNIVERSITY RELATIONSHIP OF STARTUP COMPANIES (Q26)

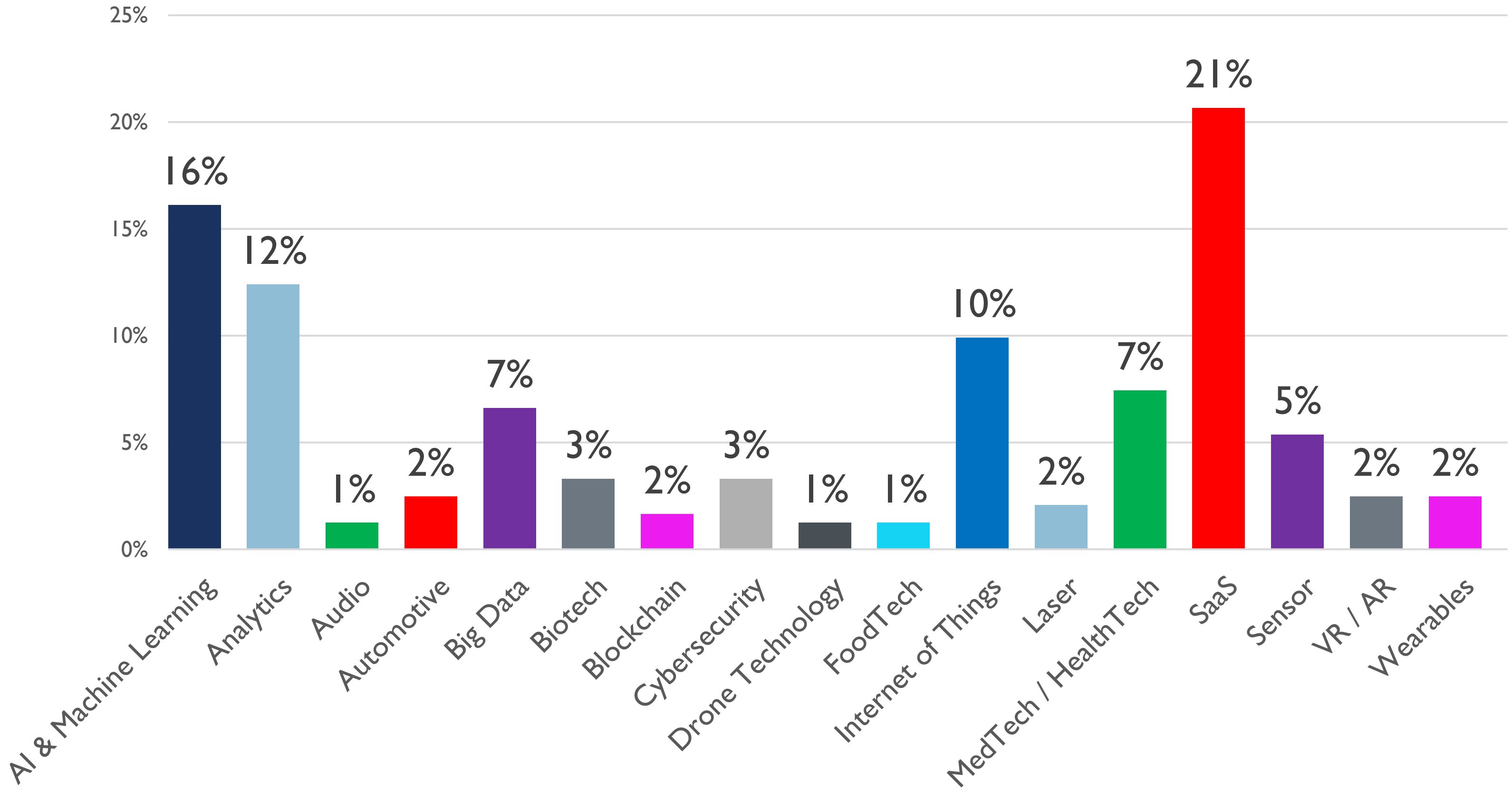
- A startup with a university background has a higher potential to grow than without this relationship.
- **According to the report, at least 21 startup or spinoff companies have been identified that have a birth or support relationship from the university**
  - Spinoff
  - Technology transfer
  - or developed from the innovation cooperation of the higher education community, and not necessarily technology transfer – Tamlink, SPARK Finland, etc.
- Aeroff Oy, Ampliconyx Oy, Battery Intelligence Oy/Bamomas, Braincare Oy/Soenia, CeLLife Technologies Oy, ColloidTek Oy, Fibrotics Oy, Fluivia Oy, Forciot Oy, Greenseq Oy, MoistMaster Oy, NeuroEventLabs Oy, Olfactomics Oy, Picophotonics Oy, Plasmomics Oy, RobustCo Oy/Enion, Sensotrend Oy, StemSight Oy, Vexlum Oy, Visumo Oy/Visuon, Wellness Warehouse Engine Oy/W2E

TECHNOLOGIES AND WEAK SIGNALS (Q3)

Technologies and weak signals describe the technological development of startup companies and possible trends.

Conclusion: AI & Machine Learning has clearly been thematically on the rise in 2023 compared to previous years.

Most commonly used technologies by startups



TOP 3 technologies (2023)

- 1) SaaS 21%
- 2) AI & Machine Learning 16%
- 3) Analytics 12%

Other significant / silent signals

- IoT, Big Data, MedTech/HealthTech, Sensor, Biotech, Cybersecurity
- The others contain an even distribution in different areas (<3%)

RESULTS OF THE SURVEY

TARGET COUNTRIES FOR INTERNATIONALIZATION

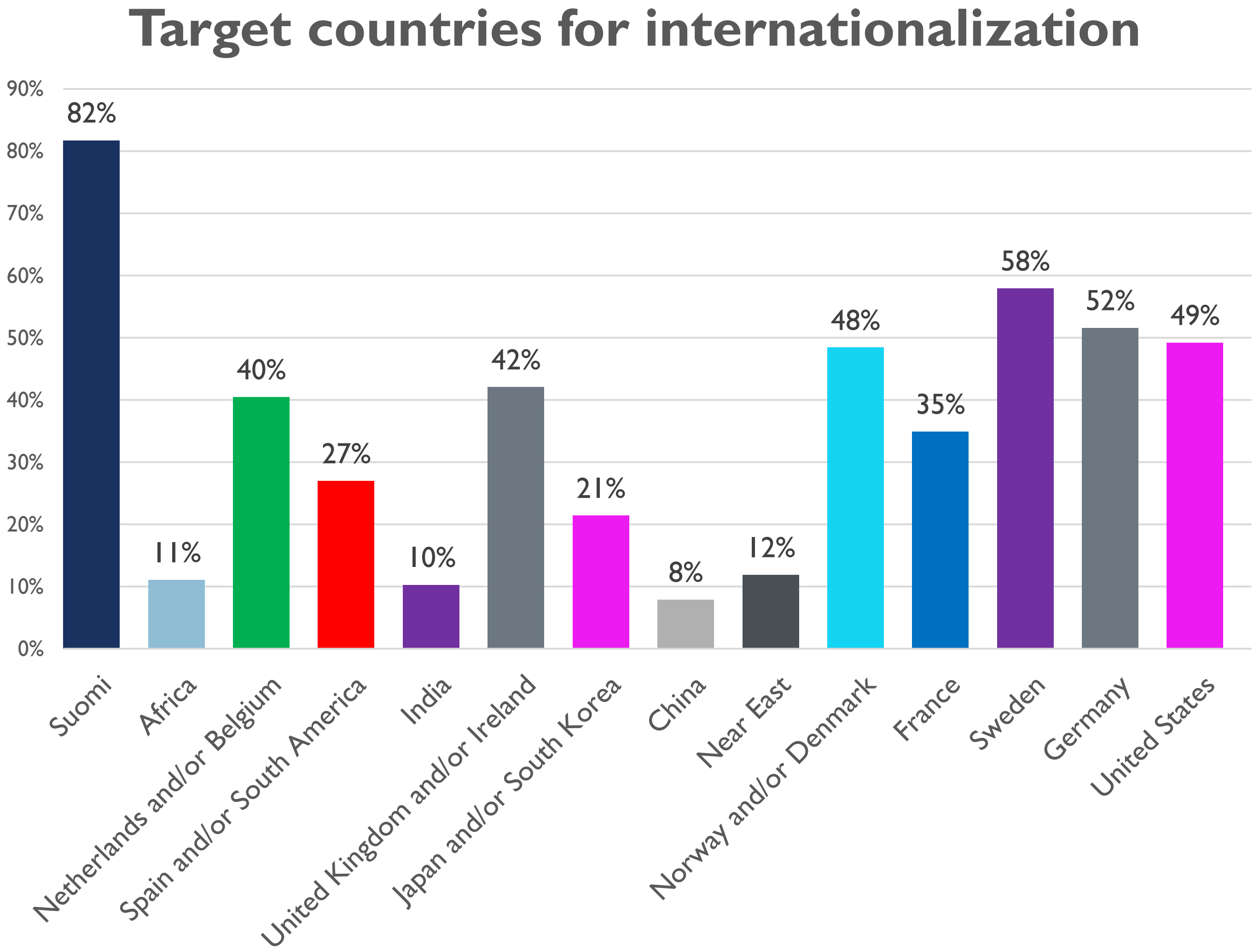
TARGET COUNTRIES FOR STARTUP COMPANIES (Q16)

The company could choose several target countries. Target countries have been added for 2023 (compared to the study of 2022)

Conclusions: Sweden has overtaken Germany as the most popular destination country.

The vast majority of startup companies, i.e. more than 80%, start in the domestic market. Some of the companies say right from the start that their business is only targeted abroad.

TOP 5: Target countries for startups (2023)
1) Sweden 58% (2022: 43%)
2) Germany 52% (2022: 44%)
3) USA 49% (2022: 38%)
4) Norway and/or Denmark 48%
5) UK and/or Ireland 42% (2022: 25%)



RESULTS OF THE SURVEY

EXCEPTIONAL SITUATION – THE EFFECTS OF THE WAR

EFFECTS OF THE WAR (Q14)

The effects of the war have been quite negative - visible effects:

- Indirect effects through the global economy, financial markets and customers. Interest rates on loans also had an impact.
- The general uncertainty has affected the purchasing behavior of customers - as industrial investments are postponed and costs rise. General uncertainty reduced customer investments and development projects.
- Customers have tight financial times. Bids are rejected due to the economy.
- The prices of materials rose and longer delivery times.

Comments from entrepreneurs:

- "Made it very difficult. Customers' willingness to invest has worsened"
- "Decision-making is slower in customer companies, especially retail as an industry has suffered from inflation"
- "Industrial demand for our services has collapsed"
- "The purchase of new technologies stopped as if at a wall"
- "Inflation sets a higher threshold for critical equipment purchases, especially lending with rising interest rates is a bigger threshold"
- "Spending habits have changed. It's harder to get funding"
- "Availability of investment as a challenge. Customer companies' caution regarding ordering"
- "Had a negative impact on getting funding, among other things“, "Yes. The last funding round failed"
- "Has not affected anything other than the timing of funding rounds"
- "Has made it very difficult to get publishers and funding for games. We also have a situation where (according to the investors themselves) we would have already concluded a investment agreement for the next two years without these events"
- "There are no sales opportunities for the Russian market at all. Inflation and high interest rates have made it difficult to get financing"

EFFECTS OF THE WAR (Q14)

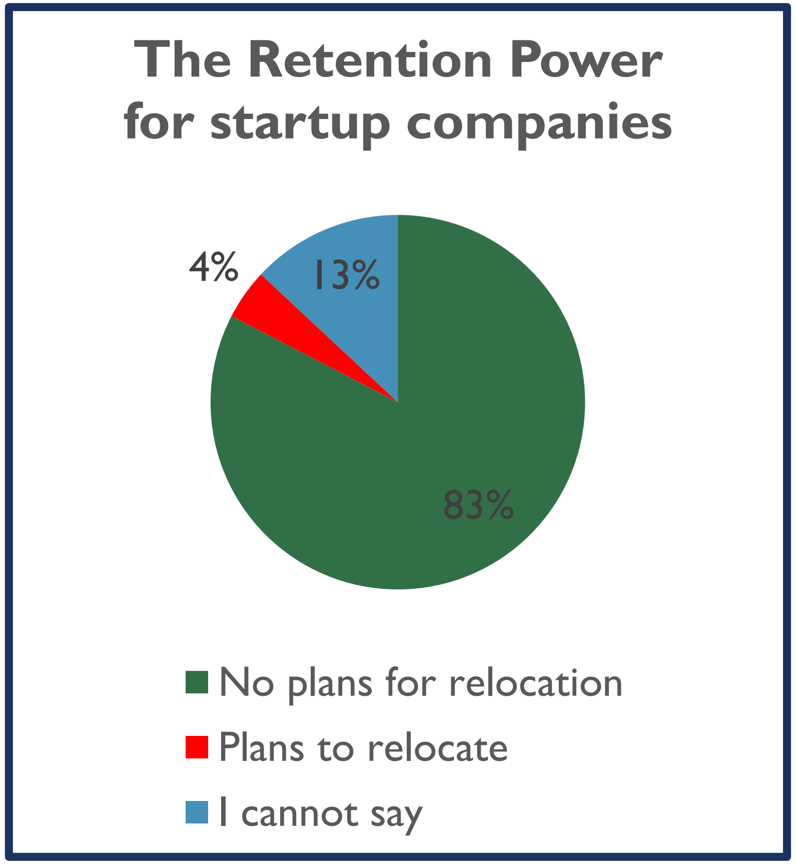
…

- " We have one Ukrainian team member, and it took time and also an emotional toll although he is doing well. We are in the healthcare business so the main problems come from the COVID pandemic. One very large hospital is unable to purchase medical SaaS from us due to financial reasons."
- "The attack scared our employees and one decided to return to his home country (quit). Other effects are minor."
- "Uncertainty whether Russian employees will be accepted as part of the company"
- "No way, but before the war it was an option to cooperate with Russian operators"
- "No influence on revenue, only Russian registration activities have been put on hold"
- "Collaboration with Russian-owned factory was terminated.", "Massive hit, we were working on a big project in Russia, all stopped"
- "Divided: The BRICS countries are apparently excluded from customers for geopolitical reasons, which is a shame because both S and B and especially I would be potential customers while C and R are clearly out of the game. On the other hand, certain other development costs, including NATO membership, have brought uncertainty to old suppliers and created an opportunity for Finland to rise to a significant position in this industry in the medium term."
- "The attack has not had a direct impact on our operations. Indirectly, of course, it has brought uncertainty and perhaps suspicion towards digital services. Finland's geographical position as a service provider and investment destination can potentially be a negative factor when making decisions. The energy crisis/economic situation is reflected directly and requires continuous evaluation of the customer benefit."
- "Sufficient availability of components had to be paid attention to in supply chain management. Loan rates have risen."
- "The increase in transport prices increased interest in our services"
- "Opened people's eyes to energy prices and their uncertainty -> positive impact on our business"
- "New products and ideas regarding cyber as well as different systems have been born", "Increased demand for defense technology", "Generally weakened situation in the construction industry"

RESULTS OF THE SURVEY

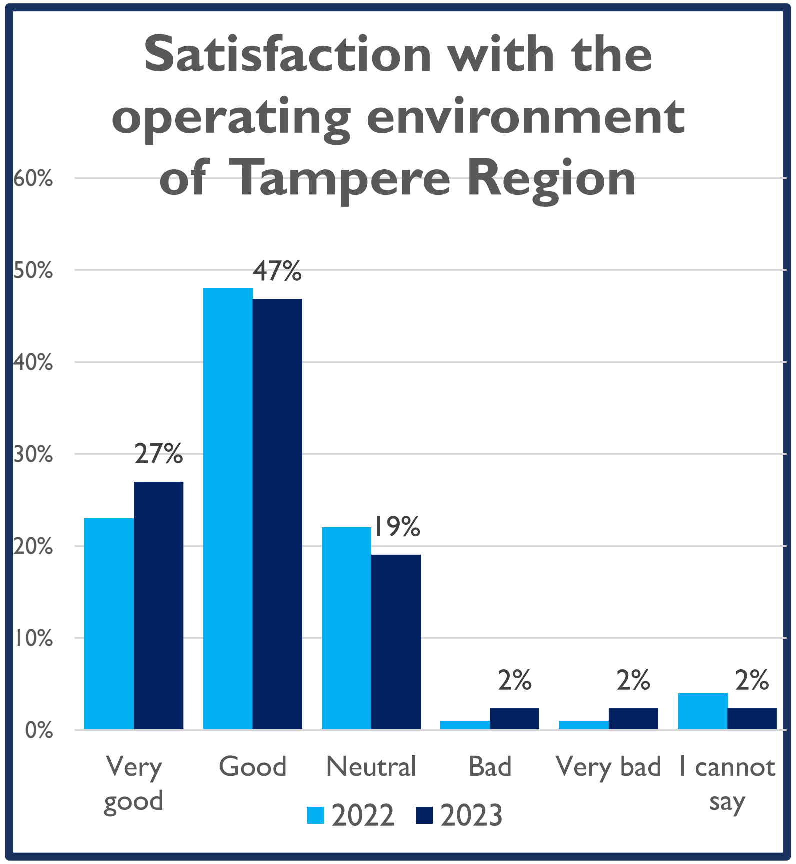
OPERATING ENVIRONMENT

TAMPERE REGION – THE RETENTION POWER FROM THE PERSPECTIVE OF STARTUPS (Q27)



- **Summary:**
  - 83% say they are not planning to move out (+3% compared to 2022)
  - 6 startups say they are planning to relocate.
  - About 13% can't say (-7% compared to 2022).
- **Conclusions:**
  - **Statistical**: Tampere's retention power has increased
  - **Realized**: The retention power of the Tampere region helps to keep startup companies in Tampere region
    - In 2022, 3 startups said they were planning to move out. When looking at the situation in retrospect, one identified startup relocated in 2023

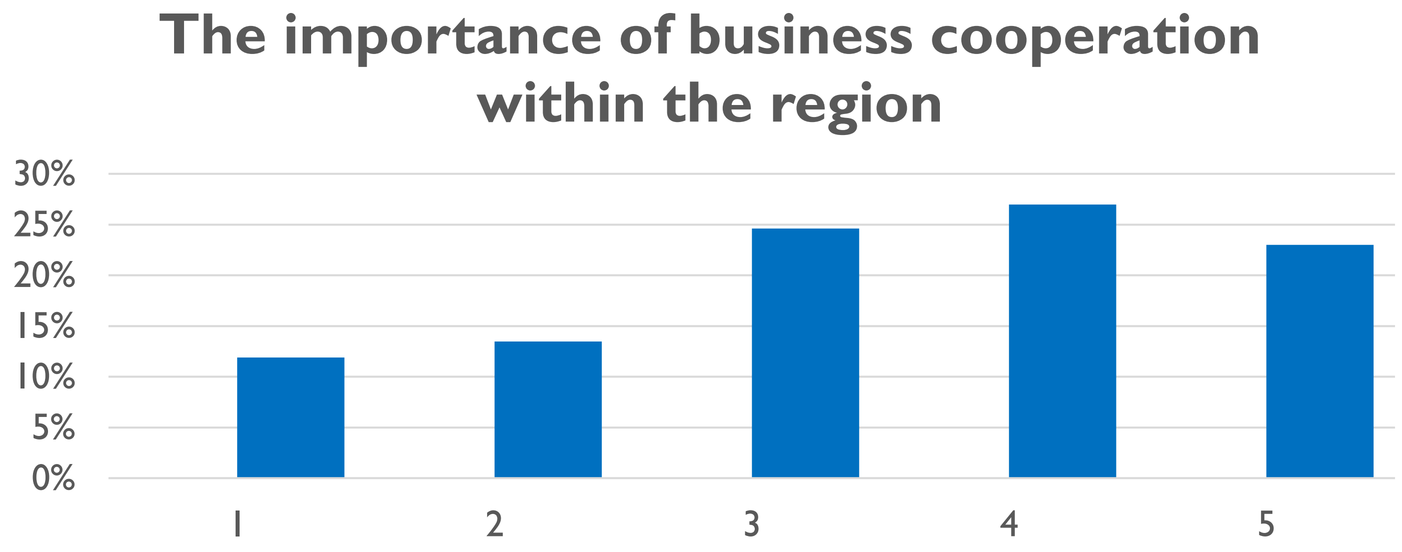
TAMPERE REGION
– EXCELLENT OPERATING ENVIRONMENT FOR STARTUPS (Q29)



- **Background information:**
  - **Question:** ”Miten arvioitte Tampereen kaupunkia startup-yrityksenne toimintaympäristönä?” / ”How do you evaluate the city of Tampere as an operating environment for your startup?”
  - **Answer options**: Very good, good, neutral, bad, very bad, I cannot say
- **Summary:**
  - Startup operating environment in Tampere received good feedback: **27% gave a very good and 47% a good assessment.** Bad and very bad ratings were given by 3 startups each.
  - The very good answer has increased by +4% compared to 2022
  - There has been a decrease in neutral and I cannot say answers
- **Conclusions:**
  - The average rating of the operating environment is good
  - At least 70 can be formed as an NPS index

TAMPERE REGION – THE IMPORTANCE OF BUSINESS COOPERATION WITHIN THE REGION (Q30)

- **Summary:** The importance of business cooperation within the region is emphasized as important, average 3.36 (5=very important, 1=not important)
  - Some of the expectations for cooperation between companies have been received as qualitative feedback in open answers
  - The answers are not comparable to the study of 2022, because the scale has been changed
- **Conclusion:** Building business networks and clusters regionally meets the needs of startup companies
  - As a subject for further research, the material enables the search for differences in emphasis with the help of following variables: serial entrepreneurs, industries, size class, age



RESULTS OF THE SURVEY

THE CURRENT SITUATION

THE CURRENT SITUATION: OPERATING ENVIRONMENT OF TAMPERE REGION

- The city of Tampere acts as the central organization of the startup ecosystem. The mayor's program and city strategy of the city of Tampere recognize the role of startup companies in versatile urban development. The importance of Platform6 as a growth and development platform that gathers startup companies and services has been emphasized.
  - According to the survey, 27 of the active startup companies are located in the Platform6 startup hub according to their postal address. In addition to this, many other companies have operations on Platform6. Contact information about locations and an up-to-date listing of Platform6's startup companies are available at: www.platform6.fi.
- Business Tampere has played a significant role as a developer of the startup ecosystem in 2018-2021. From 2022, Business Tampere's role has focused on financial advice and serving scaleup companies.
- Tampere University plays a wide-ranging role as a developer of innovation activities and a growth platform for new spinoff companies. The birth of the new Tampere University in 2019 has brought new perspectives and opportunities for development.
- Through the survey, the startup companies have given feedback on the Tampere ecosystem and the city of Tampere. Based on them, the factors affecting the growth and development of startups in Tampere are continuously monitored and researched.
- The survey has identified topics for further development and research, for example, growth services and building business networks with large companies and the city. The subject area could also benefit from further academic research to support management with information and to identify good practices of ecosystems and business networks in accordance with business-led principles.

SNAPSHOT:
GLOBAL AND NATIONAL CHANGES

Investment in Israeli tech firms slumps 56%, hit by political upheaval and Hamas war

2023 saw the number of deals plunge 44% year-on-year, while foreign investors' share in funding Israeli startups increased in wartime, IVC-Leumitech data shows

(Times of Israel, 2023, https://www.timesofisrael.com/investment-in-israeli-tech-firms-slumps-56-hit-by-political-upheaval-and-hamas-war/)

- Globally, the birth of startups has decreased in e.g. Israel (Times of Israel, 2023) and the USA: "2023 was an 'extinction' level year for tech startups" (CNN, 2023).
- According to the report, the following global and macroeconomic factors affect the number and success of startup companies:
  - Russia's war of aggression against Ukraine and the disruptions it causes to supply chains and the economic system (Russia connections, inflation)
- The startup population number of Tampere Region in 2023 compared to 2022 is +3,2% higher (in 2022: 190 startups; in 2023: 196 startups)
  - **Tampere has succeeded relatively well in the globally difficult startup cycle, because the number of startup companies, their turnover and their funding have increased in Tampere Region.**

THANK YOU!

ADDITIONAL INFORMATION:

TOMMI UITTI

TOMMI.UITTI@TUNI.FI

APPENDIX 1: LIST OF NAMES OF ACTIVE STARTUP COMPANIES

Adjective Animal Oy
Adventure Toe Studios Oy
Aeroff Oy
Agendium Oy/Cyberday
AI IO Oy
AI Marketing Oy/Dashboa
Ampliconyx Oy
Arctic Biomaterials Oy
Arctic Studios Oy/CloudBounce
AssetInsights Oy/AssetCanyon
Authbound Oy
Avalosys Oy
Aveksana Oy
Battery Intelligence Oy/Bamomas
Big Game Company Oy
BioGenium Microsystems Oy
Biomark Health Oy
Biomendex Oy
BioMensio Oy
BioNavis Oy
Bioretec Oy
Block Solutions Oy
Blokgarden Oy
Boom Corp Oy
Braincare Oy/Soenia
Brighterwave Oy
Brightlife Oy
Buffer Solutions Oy/The Storage
Buildie Oy
Buildlink Oy
Carbofex Oy
CCE Finland Oy/eSisu Schools
CeLLife Technologies Oy
Cirous Oy/Porkkanapankki
Citynomadi Oy
Codease Oy
ColloidTek Oy
Colossal Order Oy
Combinostics Oy
CoreHW Oy
CoreSeer Company Oy
Crosshill Oy
CySec Ice Wall Oy
Deep Space Studios Oy
Delta Cygni Labs Oy
Dextrous Games Oy
Dooap Oy
Dreamloop Games Oy
DTS Finland Oy
eeedo Oy
eGate Smart Building Innovation Oy
Entail Oy
Epse Oy
eSend Finland Oy
EVA Solutions Group Oy/EVA Global
Evergreen Farm Oy

APPENDIX 1: LIST OF NAMES OF ACTIVE STARTUP COMPANIES

Exafore Oy
Exercio Oy
FabricAI Oy/Visma Solutions
Fentec Oy
Fibrobotics Oy
Fifth Innovation Oy/IKI Carbon
Finnora Oy/Crowdsorsa
Finrenes Oy
Fitty Murmel Oy
Fitwood Oy
Fluivia Oy
Forciot Oy
GameProofer Oy
Genevia Technologies Oy
Gnomecraft Oy
Go SportY Oy
Greenseq Oy
Grundium Oy
Helmee Imaging Oy
Hologram Monster Oy
Hyperkani Oy
Höpöhöpö Oy
Iceflake Studios Oy
IGL-Technologies Oy
Injeq Oy
IQoL Oy
iTechRe Oy
ITFox Oy/Tassuapu

Joinplay Games Studios Oy
KeloTwin Oy
Kemion Oy
Kiki's Home Box Oy
KiwiMedi Oy
Koodikaverit Oy/Kodarit
Kuulea Energia Oy
Lainappi Oy
LAKKA Health Oy
Leadership as a Service Company Oy
Lenio Oy
LessonApp Oy
Lingoes Technologies Oy
Linio Biotech Oy
Liquid Sun Oy
Loikka Design Oy/NurseBuddy
Loopshore Oy
Lumo Health Oy
Lumoin Oy
Makea Games Oy
MAQALID Markets Oy
Marginum Oy
Material Maintenance MaMa Oy
Meluta Oy
Midnight Forge Oy/Virtual Dawn
Minilabz Oy
Missing-Link Oy
MoistMaster Oy

APPENDIX 1: LIST OF NAMES OF ACTIVE STARTUP COMPANIES

MorrowX Oy
Movendos Oy/Oiva Health Oy
NayaDaya Analytics Oy
Neatly Production Oy
Neuro Event Labs Oy
Nighthouse Games Oy
No Roof Games Oy
NoNoNo.io Oy
Nordic Market Research Oy/Buenno Research
NorthBase Oy
Nsion Technologies/Modirum Security Technologies Oy
Ocricom Oy
Oinride Oy
Olfactomics Oy
Oncarbon Oy
One Trick Entertainment Oy
Optimo Systems Oy
Orbican Oy
Osumia Games Oy
Ozonium Oy
Picophotonics Oy
Pixelflake Oy/Webber
Plasmonics Oy/Nanoksi Group
Playliner Oy
Please Be Patient Oy
Polar Night Energy Oy
Polar Partners Oy
ProChoice Oy/Vaihtopenkki
Productive Software Solutions Oy/Luuri.ai
ProTieto FI Oy
Prönö Enterprises Oy
Pure Recycle Oy
QualityDesk Oy
Quanscient Oy
Quotalogic Oy
Quva Oy
Radientum Oy
Random Potion Oy
Ravine Interactive Oy
RecceID Oy/Wellness Warehouse Engine/W2E
ReceiptHero Oy
Red Stage Entertainment Oy
RefleKron Oy
Reforest Finland Oy
Remion Oy
Repo Work Oy/Foxie AI
Robosharing Oy
RobustCo Oy/Enion
Ronsam Digital Oy/Commu
Royal Fork Oy
Rxions Oy
Saunatemppeli Oy
Seafarix Oy
Sensotrend Oy
Skydome Entertainment Oy
SmoothTeam Oy

APPENDIX 1: LIST OF NAMES OF ACTIVE STARTUP COMPANIES

Solar Fire Concentration Oy
Songpool Oy/SonicLake
Soseilu Games Oy
StemSight Oy
StepOne Tech Oy
Studio Laaya Oy
SupplyZ Oy/Resoniks
Tabnomous (Moving to Tampere)
Think Tone Oy/Digital Dogsitter
Trackinno Oy
Treon Oy
UDT Technologies Oy
Vaisto Solutions Oy
Valaa Technologies Oy/Nobody Engineering
Vektorio Oy
Vexlum Oy
Vihreä Älyenergia Oy
Visage Games
Visumo Oy/Visuon
Voconaut Oy
WatchMyDC Analytics Oy
WellO2 Oy/Hapella
Wield VR Oy
Winse Power Oy
Wisehockey Oy
Wølmark Finland Oy
XChi Oy/SoundxVision
XMLdation Oy

APPENDIX 2: QUESTIONS

- **1) Mikä on startup-yrityksenne nimi? / What is the name of your startup company?**
- **2) Mikä on startup-yrityksenne tärkein toimiala?** (Valitse paras vaihtoehto) **/ What is your most important industry for your startup?** (Choose the best option)
  - Cleantech, biotalous ja energia / Cleantech, bio-economy and energy
  - Elämystalous, ml. media ja viihde / Experience economy, including media and entertainment
  - IT-liiketoiminta, ml. hardware / Information Technology Business, including hardware
  - IT-ohjelmisto- ja yrityspalvelut / Software and Business services
  - Koulutus ja koulutusteknologia / Education and Education technology
  - Kuluttajatuotteet ja vähittäiskauppa / Consumer Goods and Retail
  - Logistiikka ja kuljetus / Logistics and Transport
  - Peliala / Gaming
  - Terveydenhuolto ja terveysteknologia / Healthcare and MedTech
  - Tieteelliset ja tekniset innovaatiot / Science & Engineering
  - Valmistus ja teolliset teknologiat / Manufacturing and Industrial Technology
  - Muu, mikä? / Something else, what?

APPENDIX 2: QUESTIONS

- **3) Mitkä avainsanat kuvastavat parhaiten teknologiaa tai palvelua johon startup-yrityksenne on erikoistunut?** (Voit valita useita) **/ Which keywords best reflect the technology or service your startup specializes in?** (You could choose multiple choices)
  - AI & Machine Learning
  - Analytics
  - Audio
  - Automotive
  - Big Data
  - Biotech
  - Blockchain
  - Cybersecurity
  - Drone Technology
  - FoodTech
  - Internet of Things
  - Laser
  - MedTech / HealthTech
  - SaaS
  - Sensor
  - VR / AR
  - Wearables
  - Muu, mikä? / Something else, what?

APPENDIX 2: QUESTIONS

- **4) Minkä pääongelman startup-yrityksenne pyrkii ratkaisemaan? / What is the main problem your startup is trying to solve?**
- **5) Kuinka monta päätoimista perustajaosakasta startup-yrityksessänne on mukana? / How many full-time founder shareholders your startup has?**
  - 1
  - 2
  - 3
  - 4 tai enemmän / or more
- **6) Tarkastelemme joitakin yrityksen perustajien historiaan ja demografiaan liittyviä taustamuuttujia. Mitkä seuraavista muuttujista olivat voimassa yrityksen perustamishetkellä?** (Voit valita useita jos on useita perustajia) **/ We look at some background variables related to the history and demographics of the founders of the company. Which of the following variables were in effect at the time the company was founded?** (You could choose several if there are several founders)
  - Ei-perustanut yrityksiä aiemmin / Not founded companies before
  - Perustanut yrityksiä aiemmin / Founded companies before
  - Nainen / Female
  - Mies / Male
  - EU-kansalainen / EU citizen
  - Ei-EU –kansalainen / Non-EU citizen
  - Ei-suomenkielinen / Non-Finnish speaker
  - Suomenkielinen / Finnish speaker

APPENDIX 2: QUESTIONS

- **7) Mitkä ovat startup-yrityksenne pääasialliset asiakkaat?** (Voit valita useita) **/ What are the main customers of your startup company?** (You could choose multiple choices)
  - B2B (Business to Business)
  - B2C (Business to Consumer)
  - B2G (Business to Government)
  - C2C (Consumer to Consumer)
  - B2B2C (Business to Business to Consumer)
- **8) Onko startup-yrityksenne kasvuhakuinen? / Is your startup company growth-oriented?**
  - Nopea kansainvälinen kasvu (eksponentiaalinen) / Fast, international growth (exponential)
  - Vakaa kasvu (tasainen kasvuprosentti) / Stable growth (steady growth percentage)
  - Ei tavoitetta kasvaa / Not aiming for growth

APPENDIX 2: QUESTIONS

- **9) Mikä on startup-yrityksenne arvio liikevaihdosta vuoden 2023 loppuun mennessä (tilikausi)? / What is the estimated revenue of your startup company by the end of 2023 (financial period)?**
- **10) Mikä oli startup-yrityksenne työntekijöiden määrä 1.1.2023?** (Kokopäiväinen vastaavuus: kaksi 50 % osa-aikaista työntekijää vastaa yhtä kokoaikaista työntekijää, ml. kokopäiväiset perustajaosakkaat) **/ What was the number of employees of your startup company 1st of January 2023?** (Full-Time Equivalents: two 50% part-time employees together equal one full-time employee equivalent, including full-time founder shareholders)
- **11) Mikä on arvio startup-yrityksenne työntekijöiden määrästä vuoden 2023 loppuun mennessä?** (ml. päätoimiset perustajaosakkaat) **/ What is your startup company's estimated number of employees by the end of 2023?** (including full-time founder shareholders)
- **12) Missä yritys on perustettu?** (Valitse paras vaihtoehto) **/ Where has the company been established?** (Choose the best option)
  - Perustettu Tampereen seudulla / Founded in Tampere Region
  - Perustettu muualla Suomessa / Founded elsewhere in Finland
  - Tullut ulkomailta perustamaan yrityksen Suomeen / Came from abroad to set up a company in Finland

APPENDIX 2: QUESTIONS

- **13) Mikä on yrityksen pääasiallinen työkieli?** (Valitse paras vaihtoehto) **/ What is the primary working language of your company?** (Choose the best option)
  - Suomi
  - English
  - Muu / other
- **14) Miten Venäjän hyökkäys Ukrainaan (ml. Euroopan energiakriisi ja korkea inflaatio) on vaikuttanut liiketoimintaanne vuonna 2023? / How has the Russian attack in Ukraine (including. European Energy Crisis and high inflation) affected your business in 2023?**
- **15) Mikä on startup-yrityksenne liiketoimintavaihe?** (Business Finlandin mukaan) **/ What is the business maturity stage of your startup?** (according to Business Finland)
  - Research (tutkimus- tai käynnistysvaihe)
  - Pre-revenue (liiketoimintamallin validointi, ml. maksuttomia pilottiasiakkaita)
  - Revenue (liikevaihdon kasvu maksavien asiakkaiden avulla)
  - Expansion (skaalautuva ja kansainvälinen kasvu)
  - Pre-IPO (viimeinen kasvuvaihe ennen listautumista)
  - Buyout (yrityskauppa)

APPENDIX 2: QUESTIONS

- **16) Millä markkina-alueilla startup-yrityksellänne on tavoite saada lisää asiakkuuksia? / In which market areas does your startup aim to gain more customers?**
  - Suomi
  - Afrikka // Africa
  - Alankomaat ja/tai Belgia // Netherlands and/or Belgium
  - Espanja ja/tai Etelä-Amerikka // Spain and/or South America
  - Intia // India
  - Iso-Britannia ja/tai Irlanti // Great Britain and/or Ireland
  - Japani ja/tai Etelä-Korea // Japan and/or South Korea
  - Kiina // China
  - Lähi-itä // Near East
  - Norja ja/tai Tanska // Norway and/or Denmark
  - Ranska // France
  - Ruotsi // Sweden
  - Saksa // Germany
  - Yhdysvallat // United States
  - Joku muu, mikä? // Other, which one?

APPENDIX 2: QUESTIONS

- **17) Mitä apua tarvitsette startup-yrityksenne liiketoiminnan kehittämiseen?** (Valitse enintään kolme tärkeintä) **/ What help do you need to develop your startups's business?** (Choose max. three most important options)
  - Juridiikka, patentit (startup) / Legal issues, patents (startup)
  - Kansainvälisen markkinoillemenon rahoitus / Funding for entry to international markets
  - Kansainvälinen myyntiosaaminen / Sales expertise at international markets
  - Kumppaniverkostojen rakentaminen / Building partnership networks
  - Markkinointiosaaminen / Marketing expertise
  - Osaavan työvoiman löytäminen / Finding talented workforce
  - Rahoittajien ja sijoittajien kontaktointi / Funding and investor contacts
  - Rahoitussuunnitelmien tekeminen / Creating funding plans
  - Toimialaosaaminen / Industry expertise
  - Tuotekehitys korkeakoulujen tai tutkimuslaitosten kanssa / R&D with universities and research institutions
  - Emme tarvitse apua liiketoiminnan kehittämiseen / We don't need any help on business development

APPENDIX 2: QUESTIONS

- **18) Onko startup-yrityksellänne ollut avoin rahoituskierros vuonna 2023? / Has your startup had an open funding round in 2023?**
  - Ei / No
  - Kyllä / Yes
- **19) Jos rahoituskierros on päättynyt, mikä oli rahoituskierroksen koko? / If the funding round has closed, how much was the funding round?**
- **20) Minkä rahoituskierroksen vaiheen startup-yrityksenne on aloittamassa seuraavaksi vuonna 2024-2025? / Which funding round stage is your startup starting next in 2024-2025?** (Tarkista Pre-Seed ja Seed -ero: https://www.brex.com/blog/pre-seed-vs-seed-funding-round-what-is-the-difference/)
  - FFF / Pre-Seed
  - Seed
  - Late Seed
  - Series A
  - Emme hae ulkopuolista rahoitusta / We do not apply for external funding
  - En tiedä / I cannot say

APPENDIX 2: QUESTIONS

- **21) Paljonko startup-yrityksenne on saanut pääomarahoitusta tähän mennessä koko elinkaaren aikana? / How much capital funding has your startup received so far during its life cycle?**
  - 0 €
  - 0–50 000 €
  - 50 000–100 000 €
  - 100 000–250 000 €
  - 250 000–1 000 000 €
  - 1 000 000 €+
  - 5 000 000 €+

APPENDIX 2: QUESTIONS

- **22) Mistä julkisesta palvelusta sinulle on ollut eniten apua startup-yrityksenne kehittämisessä?** (Mainitse enintään kolme) **/ Which public service has helped you the most in developing your startup?** (Choose max. three most important options)
- **23) Mikä julkinen palvelu on vastannut vähiten odotuksia, ja miksi? / Which public service has met your expectations the least, and why?**
- **24) Mihin Tampereen kärkiekosysteemien toimintaympäristöjen toimintaan olette osallistunut viimeisen kahden vuoden aikana?** (Voit valita useita) **/ Which operating environments of Tampere's key ecosystems have you participated in during the last 2 years?** (You could choose multiple choices)
  - Sustainable Industry X
  - Rakennukset, energia ja infra / Buildings, energy and infrastructure
  - Digitaaliset terveysratkaisut / Digital Health
  - Ei ole hyödynnetty / Has not been utilized
- **25) Miten arvioisitte käyttämienne ekosysteemien toimintaympäristöjen toimivuutta?** (Avoin vastaus) **/ How would you evaluate the functionality of the operating environments of the ecosystems you have used?** (Open answer)

APPENDIX 2: QUESTIONS

- **26) Mistä startup-yrityksen liiketoiminta tai tiimi on lähtöisin tai kehittynyt? / Where did the startup company's business or team originate or develop?**
  - Itsenäinen idean ja tiimin kehitys / Independent idea and team development
  - Kehittänyt korkeakoulussa liikeidean tai saanut sieltä merkittävää tukea tutkimukseen, kaupallistamiseen, rahoitukseen tai aineettoman pääoman hallintaan / Developed a business idea at university or received significant support from it for research, commercialization, financing, or management of intangible capital
  - Opiskelijana korkeakoulun tukemana / As a student supported by the university
  - Uusyrityskeskuksen kautta / By Enterprise Agency
  - Innovaatiokilpailun tai -haasteen kautta / By innovation competition or challenge
  - Yrityksen spinoff / As a spin-off of the company
  - Joku muu, mikä? / Other, which one?

APPENDIX 2: QUESTIONS

- **27) Suunnitteleeko startup-yrityksenne muuttoa pois Tampereen seudulta seuraavan 12 kk aikana? / Is your startup planning to move out of the Tampere Region in the next 12 months?**
  - Ei / No
  - Kyllä / Yes
  - En osaa sanoa / I cannot say
- **28) Jos kyllä, miksi? / If yes, why?**
- **29) Miten arvioitte Tampereen kaupunkia startup-yrityksenne toimintaympäristönä? / How do you evaluate the city of Tampere as an operating environment for your startup?**
  - Erittäin hyvä / Very good
  - Hyvä / Good
  - Neutraali / Neutral
  - Huono / Bad
  - Erittäin huono / Very bad
  - En osaa sanoa / I cannot say
- **30) Kuinka tärkeää yhteistyö Tampereen seudun muiden yritysten kanssa on startup-yrityksellenne? / How important is cooperation with the other companies in the Tampere region for your startup?** [1-5]
- **31) Jäikö jotain sanomatta tai onko jotain, josta haluaisit vielä kertoa? / Is there anything left unsaid or is there anything else you would like to tell us about?**

APPENDIX 3: PRIVACY NOTICE

Tietosuojailmoitus (terms of privacy protection), Tampereen seudun startup-selvitys, 21.6.2023
Päivitetty viimeksi 13.9.2023

1. Rekisterinpitäjä

Tampereen startuptukiyhdistys ry
Åkerlundinkatu 8, 33100 TAMPERE

2. Yhteyshenkilö henkilörekisteriä ja tietosuojailmoitusta koskevissa asioissa

Tommi Uitti, 040-367 5698, tommi.uitti@tuni.fi
Tampereen startuptukiyhdistys ry

3. Kuvaus startup-selvityksestä ja henkilötietojen käsittelyn tarkoitus

Palveluntuottaja eli Tampereen startuptukiyhdistys toteuttaa:

- Tampereen kaupungin toimeksiannosta luottamuksellisen Tampereen seudun startup-selvityksen.
- Vastaava selvitys on toteutettu vuodesta 2018 lähtien, ja sen arviointiosuutta käytetään startup-ekosysteemin kehittämiseksi.
- Selvitämme yritysten kasvua, kehitystä, kasvutarpeita ja arviota seudun toimintaympäristöstä.
- Selvityksen yhteenvetotiedoista muodostetaan julkinen raportti Tampereen seudun startup-ekosysteemistä.
- Yrityskohtaisia tietoja ja henkilötietoja käsitellään luottamuksellisesti, ja tietojen käsittelystä, säilyttämisestä ja luovuttamisesta on kerrottu tarkemmin tämän tietosuojailmoituksen kuvauksessa. Yrityskohtaisia tietoja käytetään palveluiden kehittämiseen.

Palveluntuottaja ja startup-selvityksen toteuttaja toimii itsenäisenä rekisterinpitäjänä. Palveluntuottaja noudattaa henkilötietojen rekisterinpitäjän velvoitteita henkilötietojen käsittelystä. Palveluntuottaja vastaa tietopyyntöihin itsenäisesti.

Startup-selvityksen yhteydessä muodostuu kaksi rekisteriä: henkilörekisteri, jossa on tiedot yrityksen yhteyshenkilöistä ja näiden yhteystiedoista, ja Tampereen seudun potentiaalisista startup-tyyppisistä yrityksistä yritysrekisteri, jossa on vain kyseistä yritystä koskevia tietoja ja näkemyksiä, eikä lainkaan henkilötietoja.

Startup-selvityksessä kerätään erilaisia tietoaineistoja ainakin kahdessa eri vaiheessa. Tällä tietosuojailmoituksella ilmoitetaan ainoastaan nyt kerättävän aineiston rekisteritiedot. Muut aineiston osat kerätään selvityksen aiemmassa ja myöhemmissä vaiheissa ja niistä ilmoitetaan tarvittaessa erikseen kunkin aineistonhankinnan yhteydessä.

Tässä ilmoituksessa kuvattava aineisto koostuu startup-selvityksessä startup- ja scaleup-yritysten edustajilta yritysten kehitystilanteesta ja näkemyksistä kerättävän kyselyn vastauksista. Vastaukset tuotetaan kyselyalustalla, johon vastaaja etenee hänelle annetun linkin kautta tai antamalla vastauksen puhelimitse tai kasvokkain käydyn keskustelun perusteella.

Vastaajaehdokkaat on vaiheittain poimittu käsin yritysrekisteristä, joka on koostettu tätä startup-selvitystä varten. Startup-selvityksen toteuttaja lähettää vaiheittain näille poimituille henkilöille kullekin vuorollaan vastauspyynnön. Näiden vastausten perusteella muodostuu vastausaineisto, jota käytetään startup-selvityksen analyysivaiheessa startup-ekosysteemin kehityksen tietojen analysointiin.

Henkilötietoja käytetään vain yrityksen edustajan kontaktointiin vastauksen saamiseksi, eikä niistä koosteta varsinaista vastausaineistoa, jota käytetään startup-selvityksen analyysiosuuteen.

4. Yritysrekisterin ja vastausaineiston tietojen käsittely

Yrityksen edustajan antamia vastausaineistoja yhdistetään ja analysoidaan yritysrekisterin muiden yritysten antamien vastaavien vastausaineistojen kanssa siten, että niistä voidaan nähdä erilaisten yritysjoukkojen (toimiala-, ikä- tai vastaavat tekijät) mukaisia yhteisiä tekijöitä ja kehityskulkuja.

Tampereen seudun potentiaaliset startup- ja scaleup-yritykset on kerätty yritysrekisteriin itsenäisesti ja monipuolisesti eri julkisista lähteistä. Yritysrekisteri ja sen yhteystiedot on koostettu pääasiassa seuraavista tietolähteistä: YTJ-rekisteri, Kaupparekisteri, Dealroom/Business Finland, B2B Profinder, Fonecta, Talouselämä, Crunchbase, Tampereen kaupungin, Business Tampereen ja Platform6:n nettisivut. Yritysrekisterin tietoja voidaan rikastaa käyttämällä tietoaineistoja näistä eri lähteistä.

Yksittäisen yrityksen vastaustietoja ei julkaista selvityksessä yhdistettynä yrityksen nimitietoon, eikä yrityksen luottamuksellisten vastausten kautta saatuja tietoja luovuteta eteenpäin ilman erillistä tietojen luovutusta koskevaa nimenomaista lupaa.

Yrityksen osallistuminen selvitykseen ja tunnistaminen startup-yritykseksi voidaan julkistaa. Tämä voidaan tehdä myös julkisista lähteistä tehtävän analyysin perusteella, eli yrityksellä ei ole mahdollisuutta pyytää poistumista kokonaan yritysrekisteristä.

Henkilötietoja käytetään vain yrityksen edustajan kontaktointiin vastauksen saamiseksi, eikä niitä julkaista missään yhteydessä tai välitetä eteenpäin ilman erillistä suostumusta.

Palveluntuottaja noudattaa voimassa olevan tietosuojalainsäädännön edellyttämiä menettelytapoja ja henkilötietojen käsittelyä ja suojaamista koskevia säännöksiä. Palveluntuottaja vastaa siitä, että palvelu on kulloinkin voimassa olevan tietosuojalainsäädännön mukainen ja ottaa huomioon tietosuojaan liittyviä vakiintuneita käytäntöjä ja sen mitä on erikseen kunkin osapuolen kanssa sovittu.

5. Selvityksen nimi, luonne ja kesto- ja säilytysaika

APPENDIX 3: PRIVACY NOTICE

Selvitys on Tampereen seudun startup-selvitys 2023, joka sisältää sekä kvantitatiivista ja kvalitatiivista menetelmällistä tutkimusta ja sen perusteella muodostettua analyysiä, pohdintaa ja toimenpidesuosituksia.

Startup-selvityksen aineiston keruun arvioitu kestoaika on syyskausi 2023. Startup-selvitys valmistumistavoite on joulukuussa 2023, ja se saatetaan julkisesti saatavaksi Tampereen kaupungin kanssa erikseen sovituilla tavalla.

Tämän aineiston osalta startup-selvitys on kertatutkimus. Aineistot arkistoidaan ja säilytetään tutkimuksellisista syistä 5 vuotta vertailukelpoisuuden saavuttamiseksi mahdollisten tulevien selvitysten ja akateemisten tutkimusten mahdollistamiseksi.

6. Selvityksen osapuolet ja vastuunjako

Tilaaja:
Tampereen kaupunki, Timo Antikainen, elinkeinojohtaja

Toteuttaja:
Tampereen startuptukiyhdistys, Tommi Uitti, tutkimuspäällikkö

7. Henkilötietojen käsittelyn oikeusperuste

Henkilötietojen käsittelyn oikeusperusteena käytetään EU:n yleistä tietosuoja-asetusta, artikla 6 kohta 1 sekä tietosuojalaki 4 §, joiden mukaan startup-selvityksen oikeusperuste henkilötietojen käsittelyyn on startup-selvitykseen osallistujan oma suostumus.

8. Arkaluonteiset henkilötiedot (erityisiin henkilötietoryhmiin kuuluvat tiedot)

Selvityksessä ei käsitellä arkaluonteisia henkilötietoja.

9. Tietosisältö henkilötietojen osalta

Selvityksessä kuvatun aineiston osalta kerätään ja käsitellään seuraavia henkilötietoja vastausaineiston hankkimiseksi yrityksen tietojen osalta: yrityksen yhteyshenkilön etu- ja sukunimi, puhelinnumero, sähköpostiosoite.

Yritysrekisterin vastausaineisto startup-selvityksen analyysin toteuttamiseksi ei sisällä henkilötietoja.

10. Tietojen siirto tai luovuttaminen rekisterinpitäjän ulkopuolelle

Työn sisällön immateriaalioikeudet ovat tilaajan ja toteuttajan omaisuutta. Tilaaja saa ilman erillistä korvausta vapaat ja rajoittamattomat käyttö-, muuntelu-, kopiointi-, julkaisu- ja edelleenluovutusoikeudet toimeksiannosta syntyvään aineistoon. Toteuttaja säilyttää aineiston käyttö-, muuntelu-, kopiointi-, julkaisu- ja edelleenluovutusoikeudet akateemisella tasolla toteutettaviin kaupunkitasoisiin tutkimuksiin ja selvityksiin.

APPENDIX 3: PRIVACY NOTICE

Henkilötietoja ja yritysrekisterin tietoja voidaan siirtää kokonaisuudessaan Tampereen kaupungin haltuun. Muuten tietoja ei siirretä rekisterinpitäjän ulkopuolelle. Tietoja voidaan julkiseksi saatettavan analyysin osalta yhdistellä ja anonymisoida, mikä tarkoittaa sitä että yksittäinen vastaaja ei ole tunnistettavissa.

Yksittäisiä henkilötietoja ja yritysrekisteriin liittyviä vastausaineistoja voidaan muissa tapauksissa luovuttaa ulos vain erillisellä suostumuksella.

11. Tietojen siirto tai luovuttaminen EU:n/ETA-alueen ulkopuolelle

Rekisterin tietoja ei siirretä kolmanteen maahan tai kansainväliselle järjestölle EU:n tai ETA-alueen ulkopuolelle.

12. Automatisoitu päätöksenteko ja kontaktointi

Automaattisia päätöksiä tai kontaktointia ei tehdä hyödyntämällä henkilötietoja tai yritysrekisterin tietoja.

13. Rekisterin suojauksen periaatteet

Aineistoja ei käsitellä paperilla, vaan tiedot pidetään digitaalisesti suojattuina Tampereen yliopiston tietojärjestelmien voimassa olevien tietojasuojakäytäntöjen mukaisesti.

Tietosuojakäytäntö sisältää Tampereen yliopiston käyttäjätunnusten luottamuksellisen käytön ja pääsynhallinnan. Vastausrekisteriin on pääsy vain tutkimuksen toteuttajalla, ja Tampereen yliopiston tietosuojakäytännön mukaan yksittäisen käyttäjän luottamuksellinen ja yksityinen tietojenkäsittely on suojattu monipuolisella pääsynhallinnalla ja verkonvalvonnalla. Tampereen yliopisto, tietoturva: https://www.tuni.fi/fi/it-palvelut/kasikirja/tietoturva

Vastausaineistoja käsitellään paikallisesti vain selvityksen toteuttajan omalla erikseen kryptatulla kovalevyllä. Tietoja ei sellaisenaan siirretä verkon yli, eikä siihen liittyvälle tietojensiirron salaukselle ole tarvetta.

14. Startup-selvityksen suorittajat ja tietojenkäsittelijät

Startup-selvityksen suorittaa Tommi Uitti, ja hänen apunaan voi toimia erikseen valtuutettuja tutkimusapulaisia, joiden valtuutuksen voi tarkistaa viittaamalla tähän tietosuojailmoitukseen.

Valtuutettujen henkilöiden tiedot täydennetään tähän alle, jos valtuutettuja henkilöitä käytetään:

Juho Rissanen

15. Startup-selvityksen toteuttajan ja palveluntuottajan yhteystiedot

Tarkempia tietoja voi tiedustella startup-selvityksen toteuttajalta ja palveluntuottajalta:

Tommi Uitti

tommi.uitti@tuni.fi
Tampereen startuptukiyhdistys ry, y-tunnus 2869288-9

APPENDIX 3: PRIVACY NOTICE

APPENDIX 4:

IMPLEMENTATION OF THE REPORT – WORK PROCESSES

Mapping work: 252 companies were selected based on a preliminary mapping: the startup type of these companies was checked in the survey work in relation to the startup criteria.

Investigation work: A division into 4 categories was carried out based on the mapping work:

A) probably a startup company that will be contacted

B) possibly but unlikely a startup

C) the company was identified or established only during the investigation

D) a scaleup company that is already known

Analysis work: After a review based on data and criteria, it was concluded that there are 196 active startup companies in the Tampere region. The names of these companies are published as an appendix at the end of the report.

IMPLEMENTATION OF THE REPORT – DESCRIPTION OF THE METHOD AND FINDINGS

- **Class A**: 170 direct information and contact requests for the company, goal: contact with about 90% certainty.
  - By e-mail, phone and meetings, 155 companies were contacted: *138 full response series/interview + 17 quick phone conversation/meeting*. From these, sufficient information was obtained to check the type of startup, and of these 9 company data were not included in the result, because they do not meet the definition of active startup business activity.
  - *20 companies* did not respond to the contact request or could not be reached, but based on other sources and information, it was estimated that it is probably still a startup company and can be counted. This group mainly includes gaming companies.
- **Class B:** 60+ companies were considered unlikely but possibly startups, so an inquiry was sent to these companies to find out the type of startup. *Through this, 7 previously unidentified startup companies were identified* (7 answered the full set of answers).
- **Class C:** *During the research, 23 startup companies were identified* that were not yet included in the preliminary survey, for example new, established startup companies (12 answered the full set of answers). The identification was made in relation to companies established in the Tampere region and using open data sources.
- **Class D:** *Scaleup companies that are already known* were included in the study: 23 (some of the scaleups responded to the full set of answers and thus belong to class A). This information was obtained especially from the funding funnel maintained by Business Tampere online.

IMPLEMENTATION OF THE REPORT – INFORMATION SOURCES AND PROCESSES IN MORE DETAIL

Information sources:

- The company name list of the 2022 startup report was used as a starting point, on top of which additional information was compiled. Tamlink/Tampere University community, Health Hub, Red Brick, the city of Tampere and Business Tampere helped with the preliminary mapping work by offering company names.
- Personal data and confidential company data, such as people's names and CRM data, have not been transferred between organizations.
- Business network contacts, company databases/websites listing companies (YTJ, Tilastokeskus, Business Tampere, Crunchbase, Platform6, Business Finland) and other sources suitable for examining the startup type of companies, such as company websites, have been used as enriching data sources.

Information processes:

- The most labor-intensive phases have been implemented in two phases: August-September 2023 and October-December 2023.
- <u>Mapping work</u>: Forming survey questions (APPENDIX 2), preliminary mapping of companies, other background work
- <u>Investigation work:</u>
  - Contacting companies and collecting information via e-mail, forms, telephone and meetings. Companies that did not respond to the contact request were contacted again 3 separate times by e-mail and by calling. The work has been done in stages along with other activities and when permitted.
  - Text messages, social media channels and contact networks were used as reminders for the contact work. Only some of the scaleup companies were contacted because there is a lot of public information available about them.
  - The study was assisted by subcontractor Juho Rissanen through the BrainStormCorner company.
  - Regarding the report, the data privacy notice (APPENDIX 3) is valid.
- <u>Analysis work</u>:
  - The analysis was mainly carried out with the same type of information needs as in previous years. Excel and analytics tools have been used for the analysis.
  - Part of the analysis part is left only for the commissioner, but the vast majority of the analysis is available to everyone.