

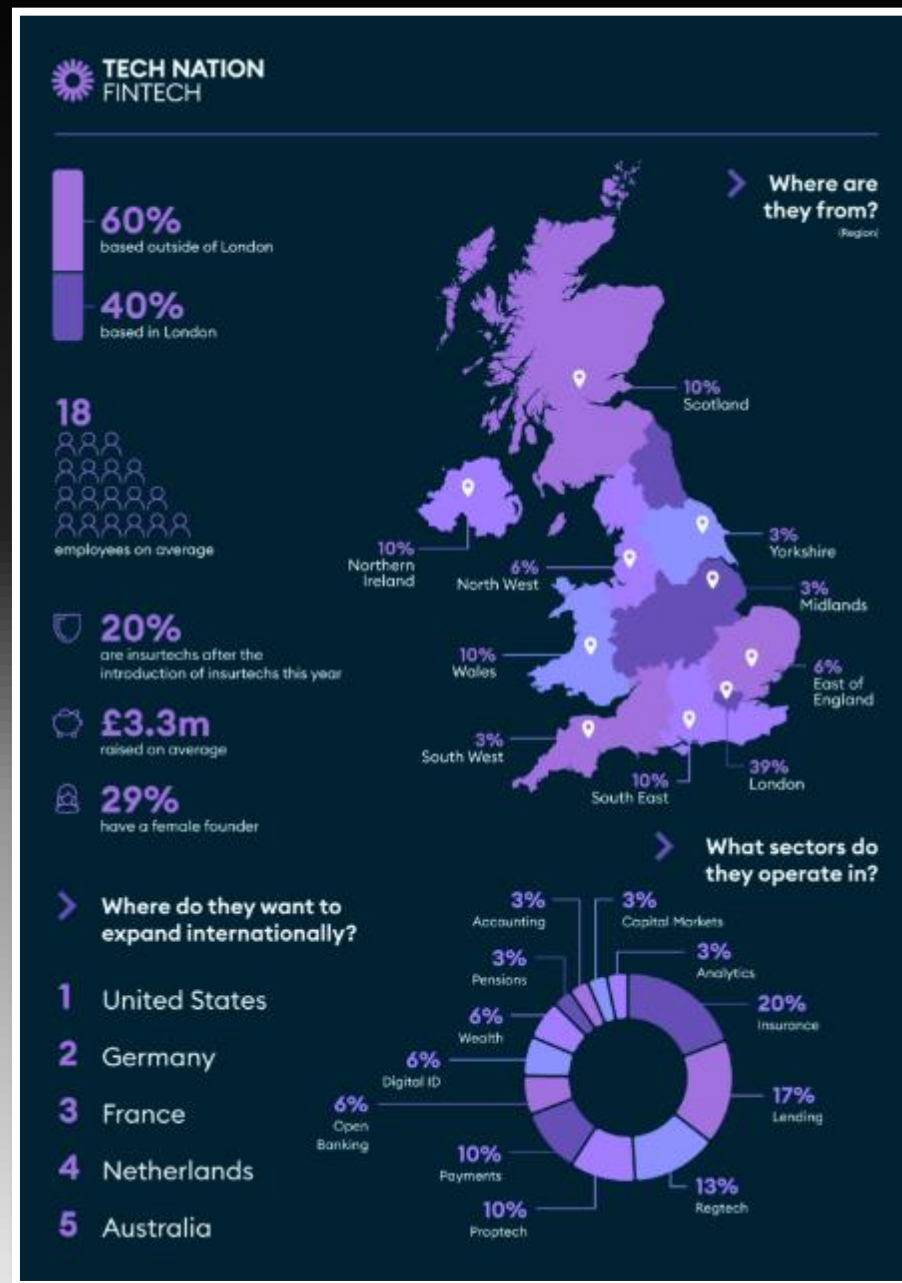


FS Club
 News Events Partnerships

How To Develop An Ecosystem For FinTechs To Thrive

Webinar

Thursday 19 November 2020





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A Word From Today's Chairman



**Professor Michael
Mainelli**

Executive Chairman

Z/Yen Group



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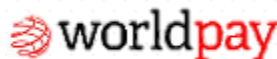
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Agenda

- | | |
|---------------|-------------------------|
| 11:00 – 11:05 | Chairman's Welcome |
| 11:05 – 11:20 | Panellist Introductions |
| 11:20 – 11:30 | Panel Discussion |
| 11:30 – 11:45 | Questions & Answers |

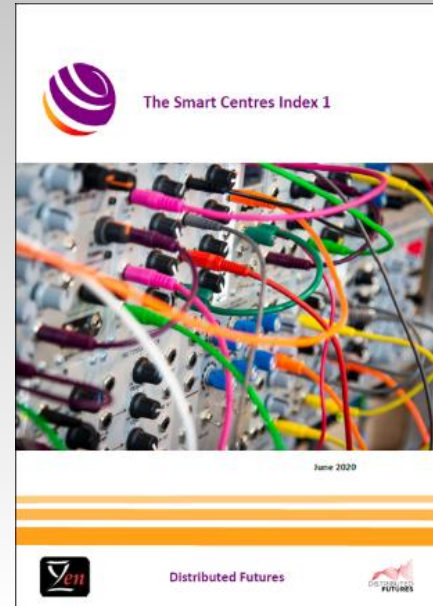
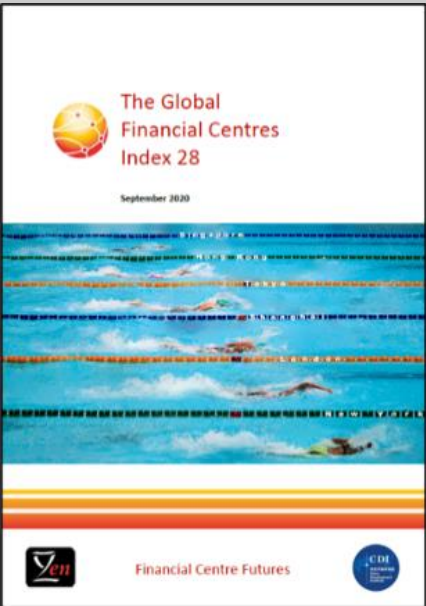


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GFCI 28 FINTECH RANKING

Centre	GFCI 28		GFCI 27		Change In Rank	Change in Rating
	FinTech Rank	FinTech Rating	FinTech Rank	FinTech Rating		
New York	1	735	1	735	0	0
Beijing	2	725	2	729	0	▼4
Shanghai	3	719	3	722	0	▼3
London	4	716	4	719	0	▼3
Shenzhen	5	713	6	709	▲1	▲4
Hong Kong	6	707	7	705	▲1	▲2
San Francisco	7	706	9	701	▲2	▲5
Guangzhou	8	701	8	702	0	▼1
Singapore	9	698	5	714	▼4	▼16
Washington DC	10	696	11	697	▲1	▼1
Boston	11	694	20	676	▲9	▲18
Los Angeles	12	693	14	692	▲2	▲1
Chicago	13	685	15	691	▲2	▼6
Tokyo	14	677	10	698	▼4	▼21
Paris	15	674	18	678	▲3	▼4
Edinburgh	16	669	26	656	▲10	▲13
Amsterdam	17	665	25	659	▲8	▲6
Seoul	18	661	27	655	▲9	▲6
Frankfurt	19	660	19	677	0	▼17
Vancouver	20	659	New	New	New	New





UK FINTECH OVERVIEW

+1600

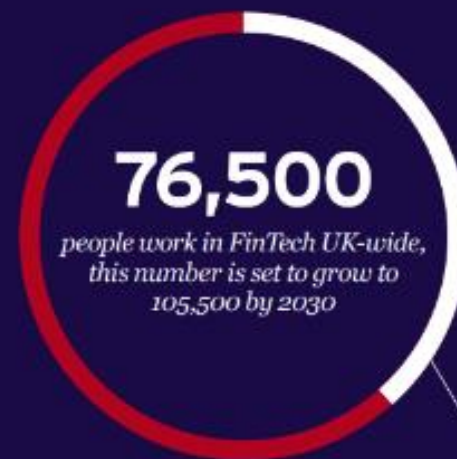
FinTech firms in the UK, estimates suggest this will more than double by 2030

42%

UK's FinTech adoption rate. Global average is 33%

82%

of incumbents expect to increase FinTech partnerships in the next three to five years



89,000

finance and insurance firms in the UK

\$3.3bn

of VC, PE and CVC investments into UK FinTech in 2018

42%

of workers in UK FinTech are from overseas

56%

of traditional financial institutions have put disruption at the heart of their strategy

64,000

London has the world's highest concentration of financial and professional service firms



TOP 10 EMEA FINTECH DEALS IN H1 2020

Top 10 fintech deals in EMEA in H1 2020



1. **N26** — \$570M, Berlin, Germany — Banking — *Series D*
2. **Revolut** — \$500M, London, UK — Payments/transactions — *Series D*
3. **Klarna** — \$200M, Stockholm, Sweden — Payments/transactions — *Late-stage VC*
4. **Prepaid Financial Services** — \$162.3M, London, UK** — Payments/transactions — *M&A*
5. **Checkout.com** — \$150M, London, UK — Payments/transactions — *Series B*
6. **Starling Bank** — \$123.1M, London, UK — Payments/transactions — *Late-stage VC****
7. **CurrencyCloud** — \$121.8M, London, UK — Payments/transactions — *Series E*
8. **Qonto** — \$115.8M, Paris, France — Payments/transactions — *Series C*
9. **Tink (Financial Software)** — \$100.2M, Stockholm, Sweden — Lending — *Series E*
10. **Onfido** — \$100M, London, UK — Cybersecurity — *Late-stage VC*

Source: Pulse of Fintech 2020, Global Analysis of Investment in Fintech, KPMG International (data provided by PitchBook), *as of 30 June 2020. **Prepaid Financial Services' head office is in London, so per PitchBook methodology, its headquarters is listed as residing in the UK. However, it has a front office in Ireland and was founded by Irish entrepreneurs, so it also operates within the Irish venture ecosystem. ***Starling Bank's fundraising was conducted across several tranches over a period of time, which per PitchBook methodology were summed and also indicated as closed when the final tranche was concluded.



A QUICK POLL

Do you represent:

- 1) A FinTech
- 2) A Financial Institution
- 3) Neither



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Ian Lavery

Regional Director

Invest Northern
Ireland

FINTECH IN NORTHERN IRELAND

Northern Ireland:

“We looked at many potential locations and Belfast was the outstanding choice. The combination of a highly educated workforce, attractive business environment and great infrastructure, underpinned by the support of local government and Invest Northern Ireland, offers a compelling proposition for a global financial services group such as ours.”

Luke Barnett - Group CIO at Tullett Prebon





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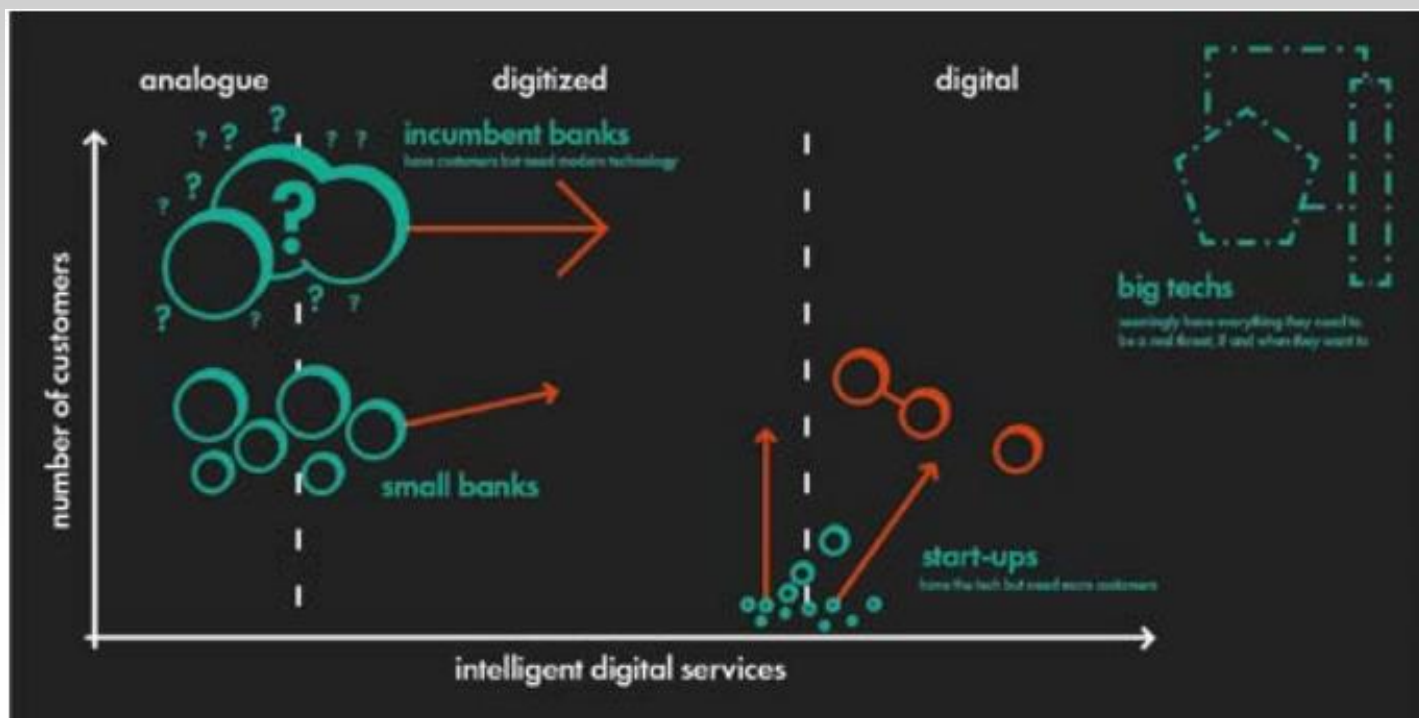


John O'Hara

Chief Executive

Taskize

PARTNERSHIPS, CULTURE & INNOVATION



“What really excites me is how fintechs can be a key element to accelerating change, and how we can collectively work to reduce friction in financial services and provide more personalized services.”

Adrian Poole
Head of Financial Services,
Google Cloud Platform UK & Ireland





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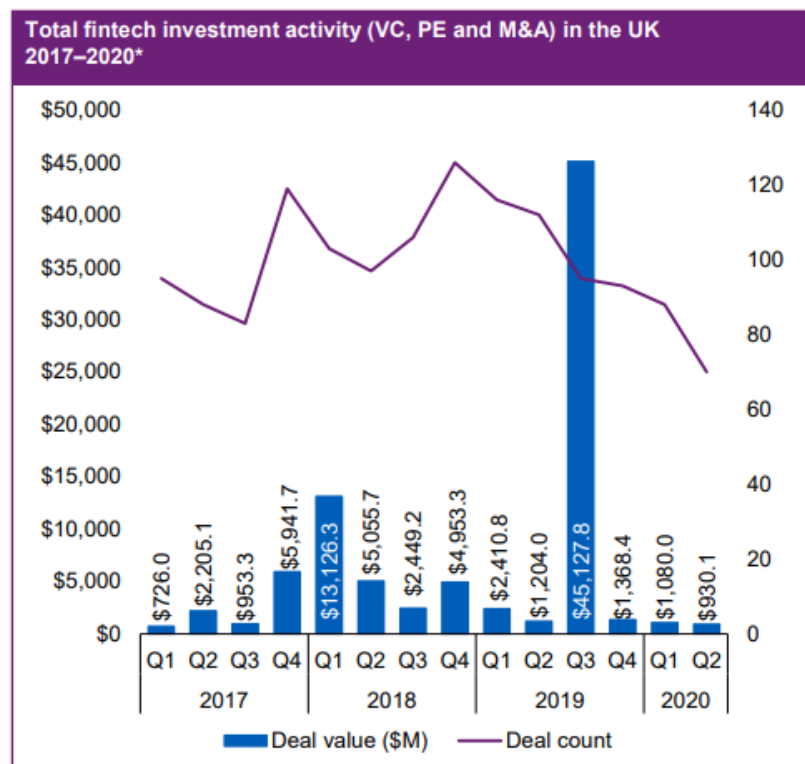
Kirk Wylie

Technology Executive

NatWest Group

FINTECH INVESTMENT & LEGACY FIRMS

UK corporates doubling down on fintech funds



Source: Pulse of Fintech H1'20, Global Analysis of Investment in Fintech, KPMG International (data provided by PitchBook), *as of 30 June 2020.

“ Current events are driving a real digital dislocation in the financial services market. Certainly, here in the UK, legacy firms are realizing that they need to become a lot more progressive in terms of how they invest in new capabilities. The corporates will likely come out of this a lot stronger and with a much firmer commitment to fintech investment. ”

Anton Ruddenklau
 Global Co-Leader of Fintech, KPMG International,
 Partner, Head of Digital & Innovation, KPMG in the UK



A SECOND POLL

What is the likelihood of FinTech disrupting the technology landscape?

- 1) They will completely transform financial services, in time
- 2) They will improve financial services, displacing older firms
- 3) They will improve the ecosystem, but the overall landscape will remain familiar
- 4) They have failed to impact on the industry in any noticeable way



A FINAL POLL

With the pandemic and Brexit how should FinTechs be treated by the government?

- 1) The government should do whatever it takes to stop FinTechs relocating to Europe/US, including grants and investments
- 2) Tax breaks should be retained for FinTechs
- 3) No special treatment
- 4) Other?

PANEL DISCUSSION



Ian Lavery

Regional Director

Invest Northern Ireland



John O'Hara

Chief Executive

Taskize



Kirk Wylie

Technology Executive

NatWest Group

QUESTIONS & DISCUSSION, ANSWERS?





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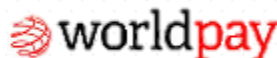
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- Monday 23 Nov (11:00) [Going Paperless: E-Signatures In CEE](#)
- Tuesday 24 Nov (10:00) [What Does Banking Stand For?](#)
- Wednesday 25 Nov (15:30) [Money In The New & Old Testament – The Influence Of Christian Thinking On Finance](#)
- Thursday 26 Nov (09:00) [Innovation & The Law](#)

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