

Control points: becoming impossible to ignore

October 2025

Objective of this workshop

- How to become impossible to ignore in the value chain
 - How to identify potential control points ?
 - How to develop and implement control points ?
 - How to secure and sustain control points over time ?

Agenda



Welcome

Examples of successful companies	14:30 – 14:35
Becoming impossible to ignore	14:35– 14:40
Introduction case 1: Vivolta	14:40 – 14:55
Introduction case 2: Munckhof	14:55 – 15:10
Discussion & wrap up: reflection on assets, growth phase and key success factors	15:10 – 15:15

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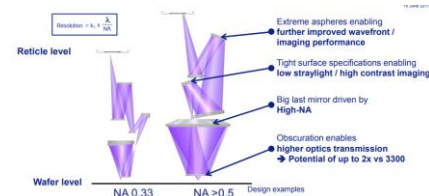
Building winners: becoming impossible to ignore

Winners create higher returns over a longer time

- Which assets and capabilities are more important than others?
 - What are the challenges in a specific growth phase – How can you overcome them?
 - Do you recognize (and fulfill?) the key success factors?
-

Examples of companies that reshaped industries

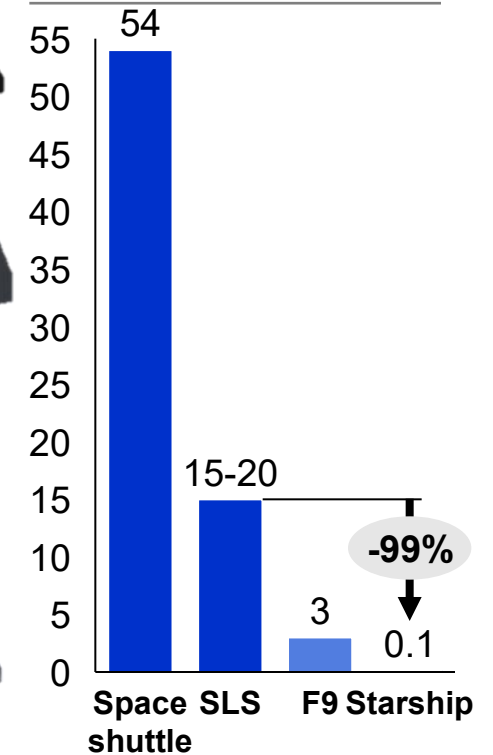
ASML



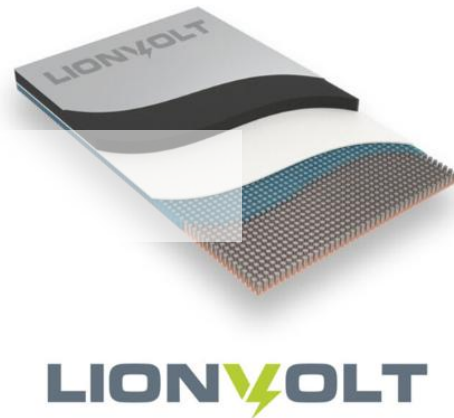
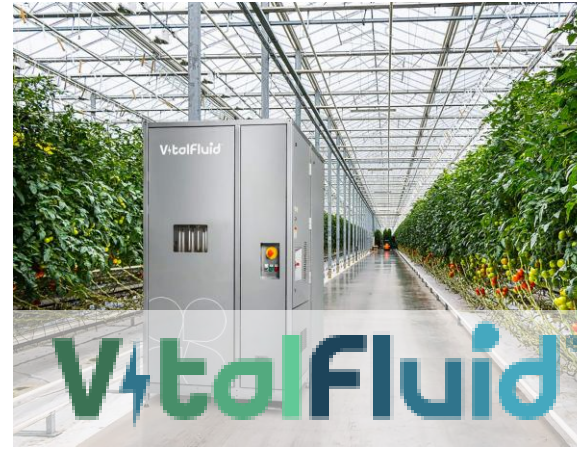
SPACEX



Expected launch cost
USD '000 / kg



NXTGEN Hightech companies with 'control point potential'



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Objective NXTGEN HIGHTECH

The NXTGEN HIGHTECH program aims to:

- 1. Leverage and expand an internationally leading high-tech equipment ecosystem**
 - Investments, talent and spill-overs
- 2. Acquire control points in new value chains**
 - Develop new, unique and hard to replicate business activities/assets
- 3. Strengthen the scientific knowledge base of the high-tech equipment ecosystem**
 - Programs on 5 key enabling technologies and 2 system technologies

What is a control point?

A control point is a unique business activity that players in the value chain cannot circumvent

- It is based on one or more unique assets or capabilities
- The value chain depends on it, and as a result margins can be high
- It provides leverage in the context of open strategic autonomy



Unique assets/capabilities for a control point

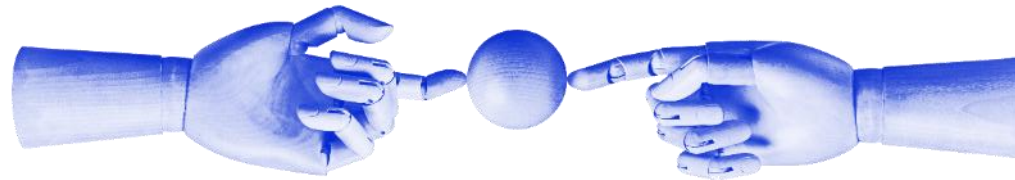
Dimensions	Examples	Company examples
Technology development	Tangible and tacit technological assets & capabilities such as IP (e.g., publications, patents), control over stack, continued innovation	ASML, NVIDIA, Apple, ChatGPT, SONY, Nintendo, Google, Tesla
Manufacturing process	Proprietary production resources, facilities, capacities, scalability, sustainability	ASML, Apple, Heineken, Tesla
Supply base	Strategic partnerships for access to materials, knowledge and skills, vertical integration, negotiating power	ASML, amazon, Tesla, Apple, AliExpress
Customer base	Domain and market knowledge, relationships and strategic partnerships with customers, co-creation, customer loyalty, branding, network effects	ASML, Leiy, Nike, SONY, Apple, Heineken, Nintendo, amazon, NESPRESSO, Microsoft
Business model	Value proposition (HW / SW), revenue streams, diversification, vertical integration, iterative development, complimentary products and services	amazon, Tesla, SPACEX
Services	Customer support, after-sales care, proactive maintenance, tailored marketing	ASML, Apple
Infrastructure	Supporting physical and digital infrastructure, such as access to research and production facilities, shared or proprietary data & analytics	ASML, Tesla, Nintendo, Apple, Microsoft, Leiy
Ecosystem	Embeddedness and participation in innovation networks, hubs, clusters, platforms, etc.	ASML, Tesla, Apple
Institutional setting	Compliance with laws & regulation, product approval (FDA, EU EMA), set proprietary standards, IP enforcement, political and economic stability	SPACEX, Pfizer, SONY
Leadership	Experienced or inspirational management, organizational vision and roadmap	ASML, Apple, SPACEX, Tesla
Organizational enablers	Financial strength, high skilled talent and education, innovative culture, logistics, procurement, etc.	ASML, Tesla, Leiy

Which assets and capabilities are more important than others?

Successful growth leaders share several key success factors

Outrageous ambition

balanced with



Speed and execution

Seven keys to business building

1

Lead with game-changing ambition. Set sight on creating something significant from the start

2

Sign up captive demand before scaling. Invite customers to invest in the business upfront to align interests even further

3

Secure a cost advantage by identifying a scaling breakpoint to reach viability as quickly as possible

4

Assess technological pathways for both maturity and performance at scale before committing investments at scale

5

Build capacity with parallel scaling. Create a modular, replicable standard for production rather than a tailor-made, one-off pilot

6

Proactively create business ecosystems. Collaborate with players in the value chains and make sure that the critical infrastructure and investments are in place

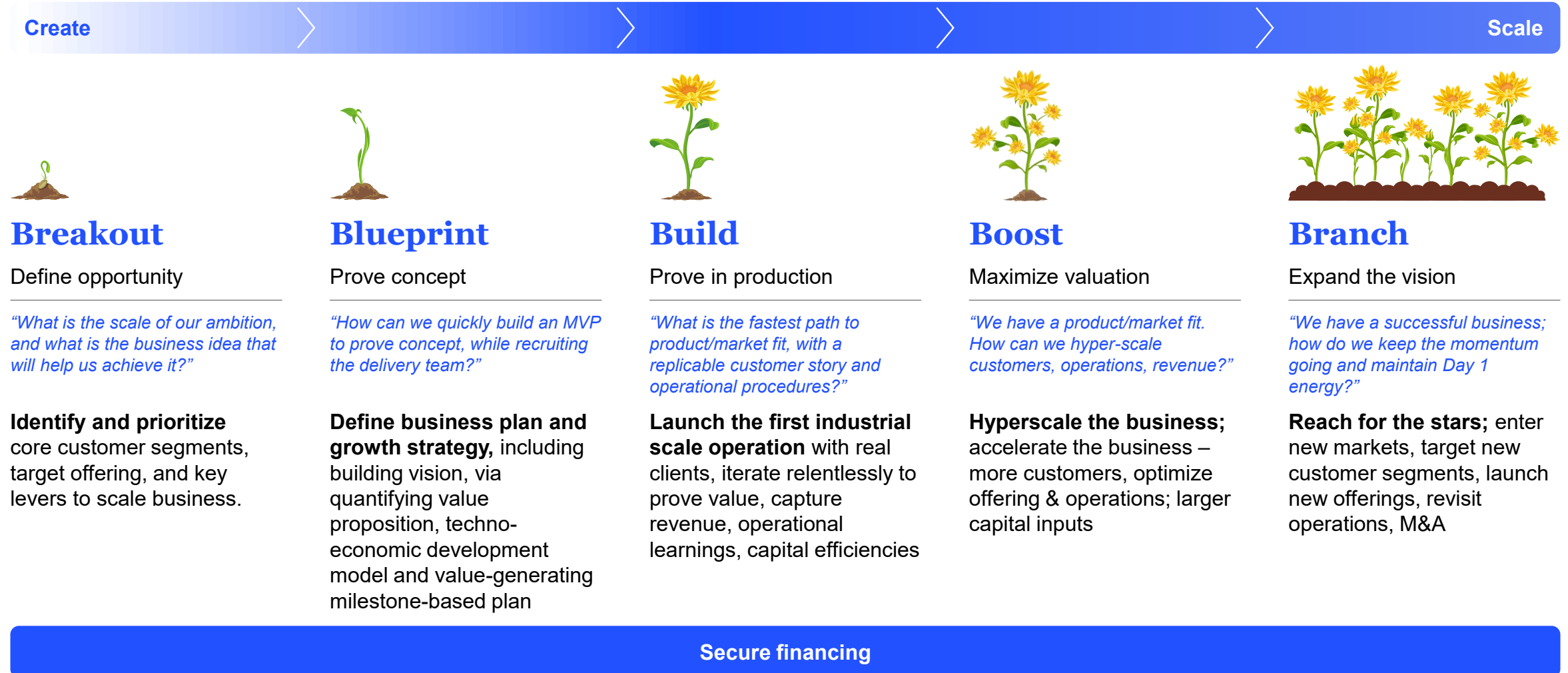
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Dedicate recruiting resources early in the process. The team makes the difference

Do you recognize (and fulfill?) the key success factors?

We have developed a proven recipe to build and scale new businesses through 5 phases

McKinsey's 5B model is a silicon valley-proven, milestone-based, agile approach to scaling physical and digital unicorns



What are the challenges in a specific growth phase - can you overcome?

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THANK
YOU



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