Panel discussion: The innovation landscape in the EU – current barriers and challenges

Luigi Amati, Board of Directors, Business Angels Europe and CEO, META Group, Italy
Sara Dagostini, Policy Officer, Financial Instruments and International Financial Institutions Relations Unit, DG REGIO, European Commission
Daniel Szczechowski, Head of Financial Instruments Unit, Ministry of Development Funds and Regional Policy, Poland
Guillaume Blanchet, Investment Director, UI Investissement, France
Isabelle Canu, Partner, GET Fund, Germany
Vlada Musvydaitė-Vilčiauskė, Founder and CEO, Walk15, Lithuania

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Luigi Amati

The innovation landscape in the EU – current barriers and challenges

Addressing key barriers

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The innovation landscape in the EU – current barriers and challenges

Addressing key barriers

- Improving investment readiness of Deep Tech projects - Preparatory Grants
- Scaling up across Europe - Business Angels and Pan European Equity Instrument
- Accessing capital for disperse excellence - Hubs vs Peripheral regions

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Thank you!

luigi.amati@meta-group.com

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DG REGIO, European Commission

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EU Startup and Scaleup Strategy

Sara Dagostini

Regio representative of the TF

Berlin, 30 09 2025

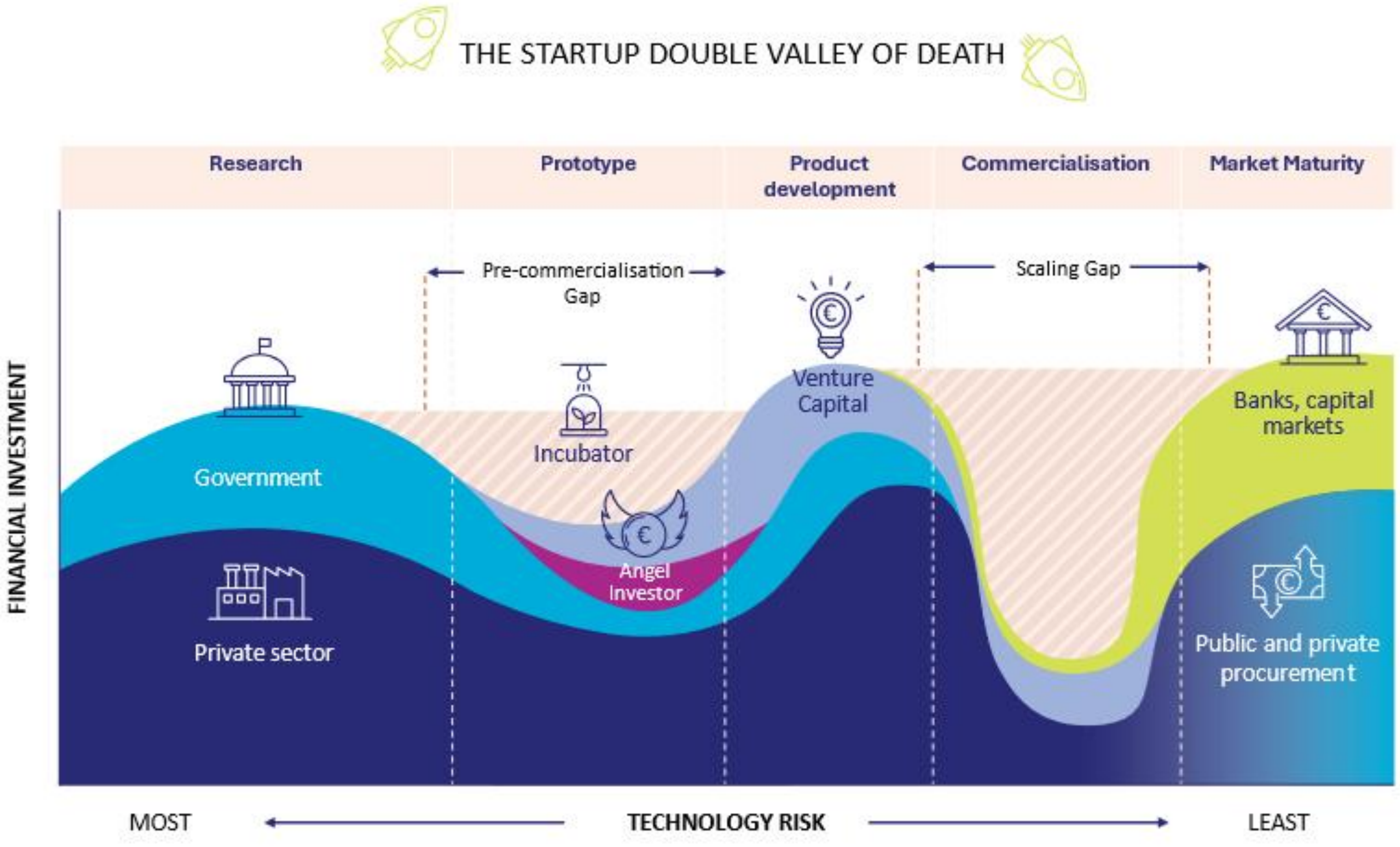
Overview

1. The vision: choose Europe to start and scale
2. Key challenges
3. Building Blocks of the Strategy

The vision: choose Europe to start and scale

- The EU Startup and Scaleup Strategy aims to make Europe the best place in the world to launch and grow global technology-driven companies
- The strategy seeks to shift the European economy towards a more entrepreneurial, innovative model
- A thriving startup and scaleup ecosystem can transform Europe’s economy – by increasing productivity, creating quality jobs and attracting talent and investments
- **Our competitiveness and ultimately prosperity depend on it**

Key challenges



Simplified illustration of the startup double valley of death

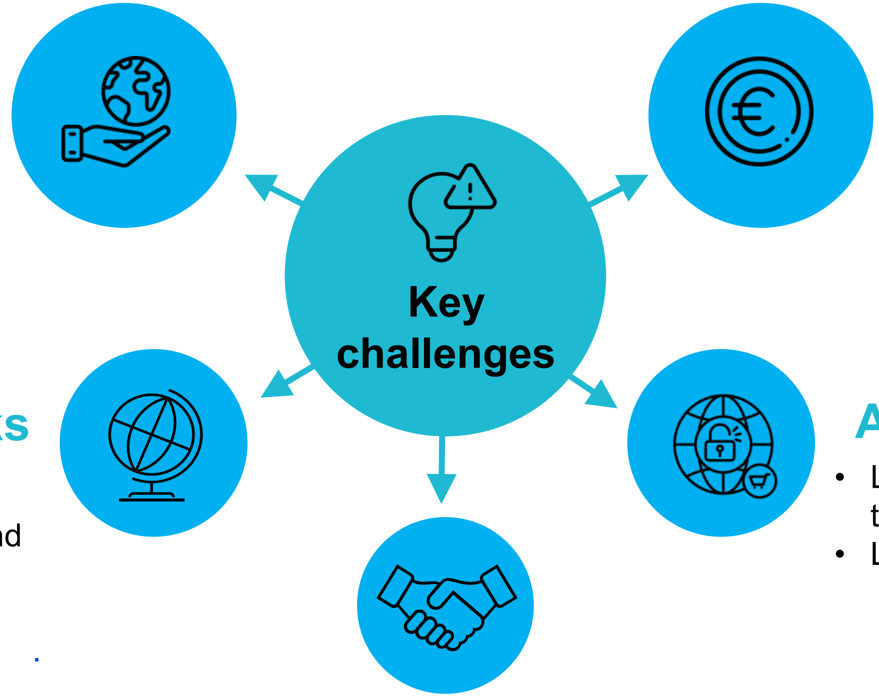
Key challenges

Regulatory and bureaucratic burdens and fragmentation

- Fragmented reporting requirements, taxation & employment conditions and high failure costs.
- Slow regulatory approval for new technologies and slow adaptation of existing regulatory frameworks to innovation.

Access to finance

- Underdeveloped EU financial market and a patchwork of national measures regulating various aspects of private investment
- The EU's VC market remains significantly underdeveloped compared to that in the US. The highest gap is observed at later-stage financing.



Access to infrastructure, networks and services

- Difficult access to and fragmentation of research and technology infrastructures, business acceleration services, coaching and networking support.

Access to markets

- Low participation rate to public procurement in the EU, the link with corporates, expanding the customer base.
- Lack of commercialisation of research.

Access to talent

- Bureaucracy, regulations, tax rules and costs prevent startups and scaleups from tapping into the highly-skilled talent they need to develop innovative products and solutions.

Building Blocks of the Strategy

- The Strategy is structured according to different needs that an innovative company may face through its lifecycle:
  - Innovation-friendly regulation
  - Better finance
  - Fast market uptake and expansion
  - Support for the best talent
  - Access to infrastructure, networks and services
- Plus: a section dedicated to measuring progress for reaching the Strategy's aims

Actions included in the Strategy

Innovation-friendly regulation

- 28th regime for companies (Q1 2026)
- European Business Wallet (Q4 2025)
- European Innovation Act (Q1 2026)
- Voluntary "Innovation Stress Test" (Q1 2026)
- Reduce regulatory burdens in strategic sectors (as of 2025)
- Revision of the Standardisation Regulation (2026)
- Study on corporate restructuring (2026)

Better finance for startups and scaleups

- Expand and simplify the European Innovation Council (2025)
- Scaleup Europe Fund (2026)
- European Innovation Investment Pact (2026)
- European investment instruments for security and defence startups and scaleups (2026)
- Framework for IP valuation (Q2 2027)
- Support for European business angels (2026)
- Review of the definition of "undertaking in difficulty" (as of Q2 2025)
- Review of the Horizontal and Non-Horizontal merger Guidelines (2027)
- European Corporate Network (2026)

Fast market uptake and expansion

- Lab to Unicorn initiative (2026)
  - European Startup & Scaleup Hubs
  - Blueprint for licensing, royalty-and revenue sharing and equity participation for academic institutions and their inventors
  - Legal and implementation guidance on the applicable State aid rules
- Pro-innovation procurement measures (2025-2026)

Support for the best talent in Europe

- Blue Carpet Initiative (2025-2026)
  - Entrepreneurial education &upskilling through EIT
  - Blueprint for an academic career development framework
  - ESOs
  - Recommendation to eliminate tax obstacles for remote cross-border employees for startups and scaleups
  - EU Visa Strategy
  - Pilot of Multipurpose Legal Gateway Offices
  - information activities for the EU Blue Card Directive
  - Encourage Member States to put in place fast-track schemes for founder residence and work permits
  - Simplify and reinforce existing EURAXESS services for innovators
- Fair Labour Mobility Package (2026)

Access to infrastructure, networks and services

- Charter of Access for industrial users to research and technology infrastructures (2025)
- European Innovation Act promoting the access of innovative companies to European research and technology infrastructures (Q1 2026)
- Guidance on the applicable State aid rules for universities and public research organisations to grant access to infrastructure (2026)

Measuring progress: Definition of startups, scaleups and innovative companies (Q1 2026), Annual startup and scaleup survey (as of 2026), European Startup and Scaleup Scoreboard (as of 2026)

Thank you

Impact on regional and territorial development

Benefits for the regions

- Economic Growth
- Enhanced Innovation Ecosystems
- Increased cohesion
- Infrastructure Development
- Job creation
- Talent Retention and Attraction
- Access to Funding and Resources

Synergies between EU funding

Better access to finance allows regions to benefits from increased availability of EU funding. EU funded programs collectively provide a comprehensive funding landscape that regions can tap into to drive innovation, economic growth and cohesion across the EU. This allow regions to capitalize on their specific strengths and needs by integrating multiple funding streams.

There are opportunities for synergies between these programs to maximize their impact.

Combining different funding sources, like pairing ERDF's regional focus with Horizon Europe's innovation drive, can optimize resource use and enhance project scope.

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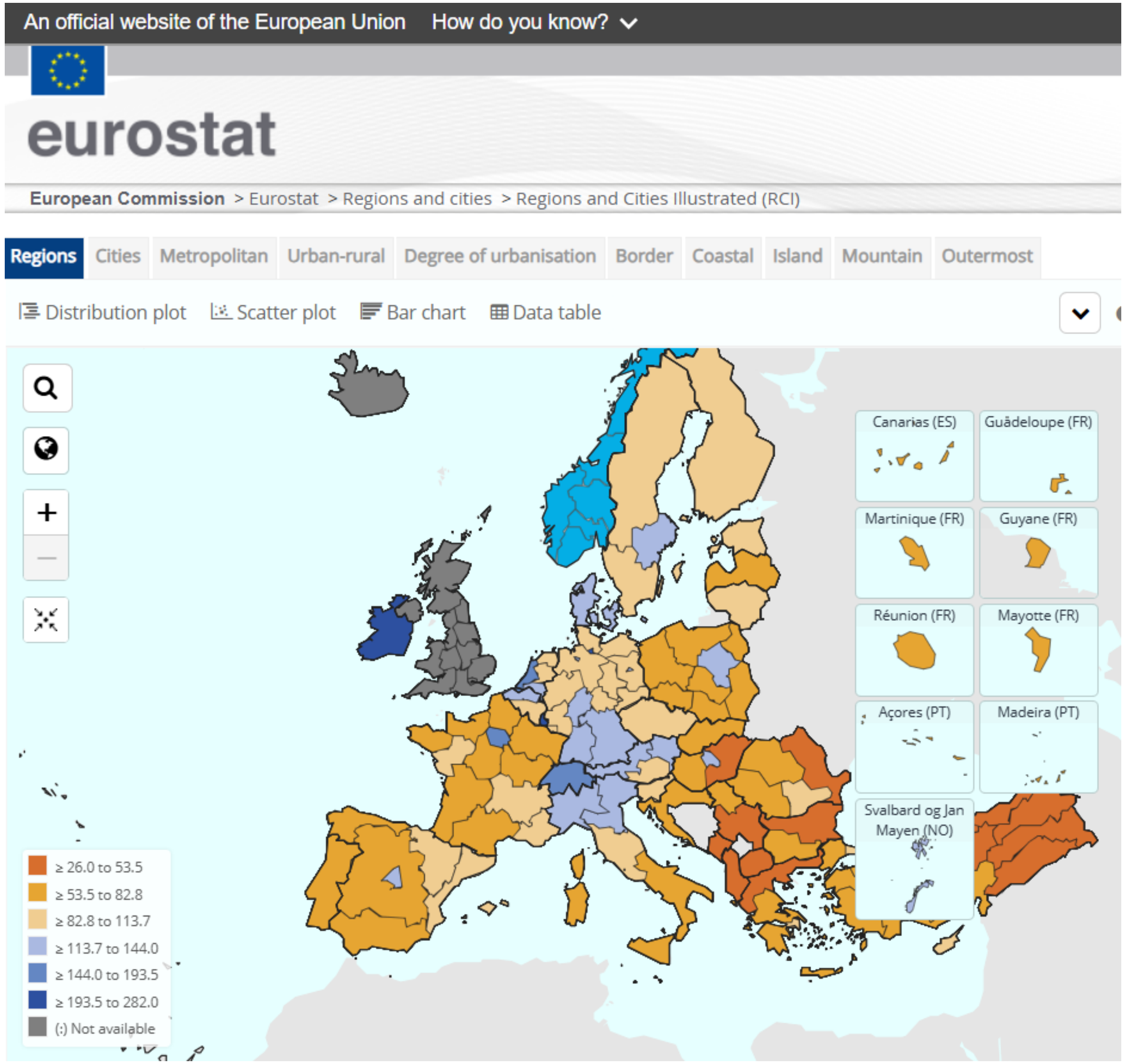
The French economy is centralised

Bourgogne-Franche-Comté GDP per inhabitant is below the EU-27 average



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And the same is true for the start-up funding scene

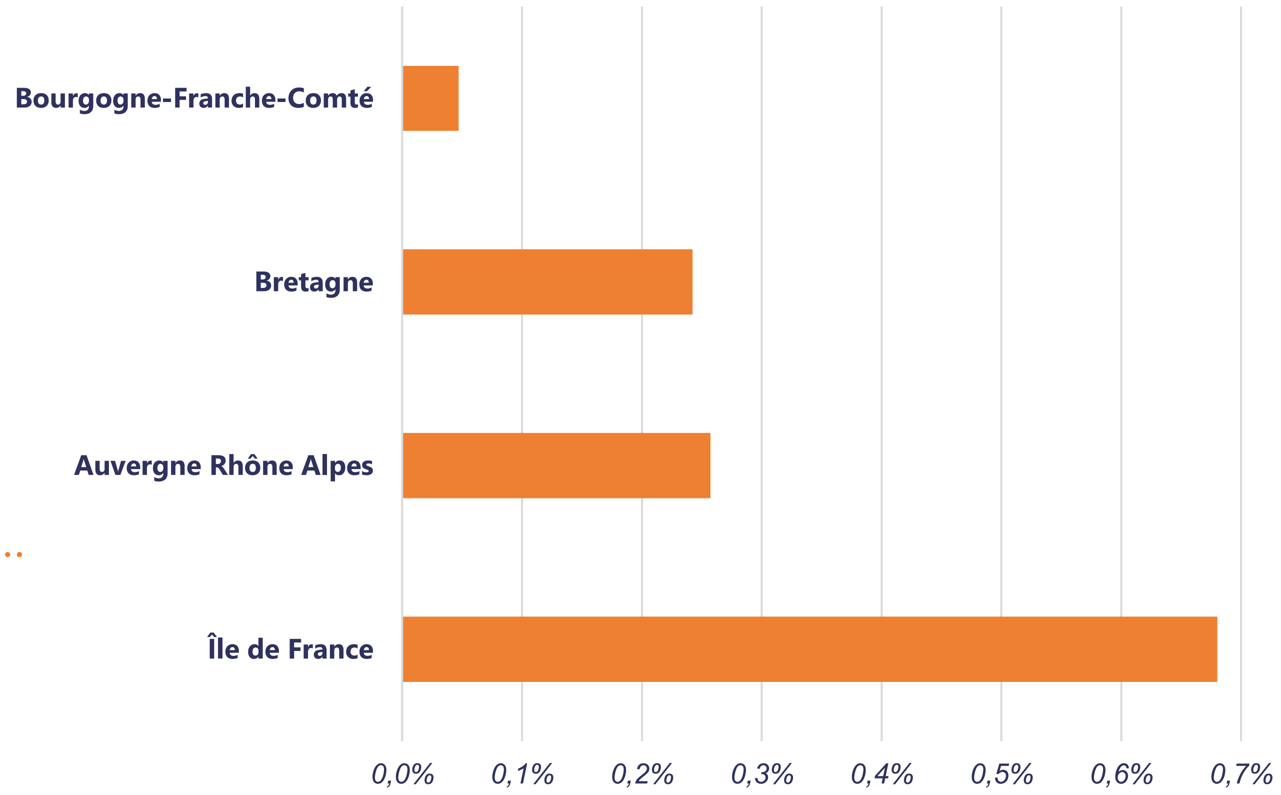
In 2024, French start-ups raised :

- 5,199m€ in Ile-de-France
- 748m€ in Auvergne Rhône Alpes
- 98m€ in Bretagne
- 51m€ in Bourgogne-Franche-Comté…

… and it was only 6m€ in 2022

Source : EY

Start-up funding raised as a percentage of regional GDP



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OSER Bourgogne-Franche-Comté

Key strength of Bourgogne-Franche-Comté's innovation ecosystem

- **Industrial heritage & strong focus on transition & decarbonisation**
  - A historically important industrial base gives the region technical know-how, manufacturing capability, and skilled workforce.
  - Sectors like micro-technologies, advanced manufacturing, vehicle of the future, materials/polymers, greentech, hydrogen, medical devices, biomanufacturing, etc., are well represented.

- **Dense start-up base & support infrastructure**
  - around 400 startups in the region over the last 5 years
  - numerous universities, incubators, accelerators, competitiveness clusters, and support structures
  - the region was named *French Tech Capital of the Year 2024*

OSER Bourgogne-Franche-Comté

Makes it possible to address the market failure

- **A real and effective leverage effect to attract early-stage private funding**
  - 2,4m€ invested by OSER Bourgogne-Franche-Comté generated :
    - ✓ ~15m€ private dilutive financing
    - ✓ ~9m€ non-dilutive financing

- **from struggling to raise capital to becoming a technology leader**

pixee medical

Activity : Augmented Surgery Imaging

Capital raised : 14m€ series A

Since funding : From 1,000 to 6,000 knee surgeries per year involving Pixee's technology, with >100% growth projected from 2025 onward

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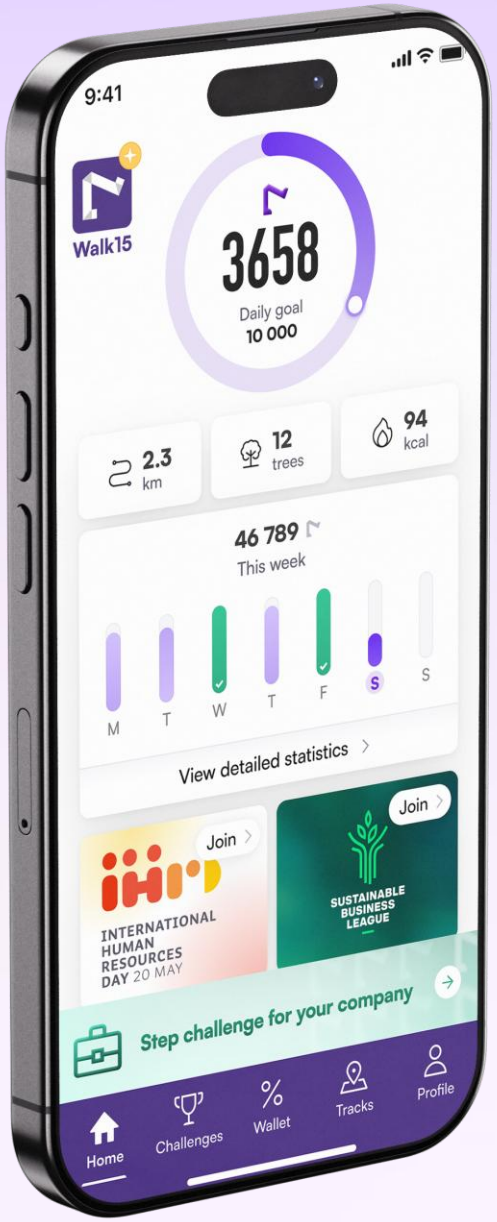

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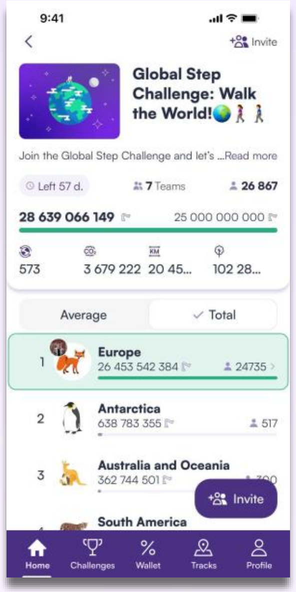
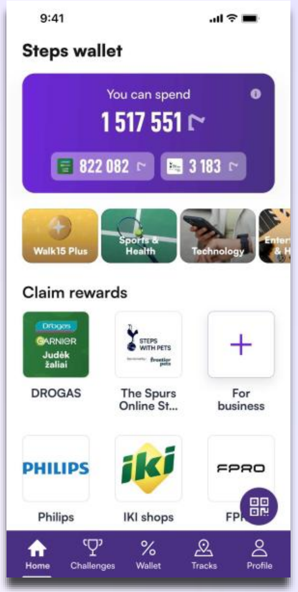
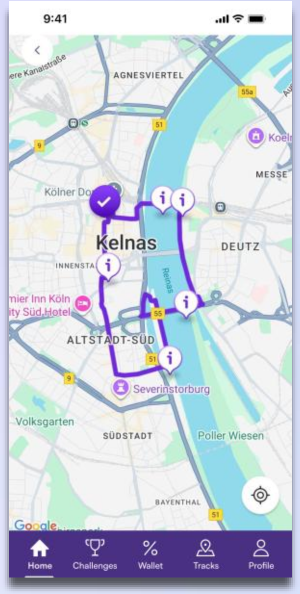
Challenges



Steps Wallet



Tracks



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