EIC Scaling Club

Highlights Market Group Next-Gen Computing

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Partners:
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Foreword & Welcome

Market Group: **Next-Gen Computing**

Jean-Michel Deligny
President
Group's Mentors

Goals

The goals of the Group's Mentors are clear: assist the 12 Company Members over the next 2 years to develop their:

1. Investments

2. Sales & Partnerships

3. Leadership

4. Visibility & Recognition

Overview

The 12 Company Members start their scaling journey from a solid base:

- **€341 million** of **investment** already raised or **an average of €28.5 million** per Company
- **5 companies** out of 12 from **Southern or Eastern Europe,** showing Europe's geographic diversity

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4-12. Market Group

12-14. 4 Market Groups

14-21. Scaling Club

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1 of 10 Market Groups

Market Group: **Next-Gen Computing**

Next-Gen Computing
Powering future computing and communications with advanced chips, quantum computing and photonics.

Digital Security and Trust
Enabling data management (AI/ML), software and systems to enhance security and trust.

New Space
Delivering communications and data solutions via satellite and(aero)space systems.

Cardiovascular Therapies
Preventing, detecting and treating cardiovascular conditions with the best outcomes at the most efficient costs.

New Biotech Platforms
Boosting the diagnostics, discovery, development and data for new therapies from cutting-edge biotechnologies.

10
Market Opportunities

Smart Mobility
Improving data and tech solutions to enhance mobility, transport, supply chains and resources.

Renewable Energies
Accelerating the deployment of next-gen renewable and nuclear energies and adapting the grid for mass electrification.

Batteries & Energy Storage
Developing the battery and storage systems of the future, reducing the use of critical materials.

Clean Fuels & Hydrogen
Scaling the green production of hydrogen and valorizing sustainable feedstocks for alternative fuels.

Agri & Food Tech
Optimising farm-to-fork practices from crop science and food production to redesigning supply chains and circular models.

Market Group: **Next-Gen Computing**

Powering future computing and communications with advanced chips, quantum and photonics.

Why it matters

The EU aims to increase its value share in the global production of semiconductors to 20% of the global market. Scaling tech for global interconnectivity boosts competitiveness and innovation.*

Main challenges

- Powering the next generation of cloud and edge computing technologies.
- Deploying technologies for an interconnected industry.

Key technologies

- Photonics, lasers and sensors
- Quantum computing chips
- Semiconductors
- Robotics and automation
- Augmented and mixed reality

Market actors

- Information technology and electronics suppliers
- Media and entertainment
- Telecommunications
- Research/Life Science
- Energy
- Space & Defense
- Consumer goods
- Automotive/Transport

* EU Next Generation Internet Initiative, EU, 2023

Group Manager

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Companies

Market Group: **Next-Gen Computing**

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Mentors

Market Group: **Next-Gen Computing**

Jean-Michel Deligny

Andreas Umbach

Christian Dupont

Jasmin Gungor

Kaija Poysti

Marek Kotelnicki

Maria Costeira

Maria Luisa Garcia

Markus Bohl

Mary Mckenna

Sam Guilaume

Selma Prodanovic

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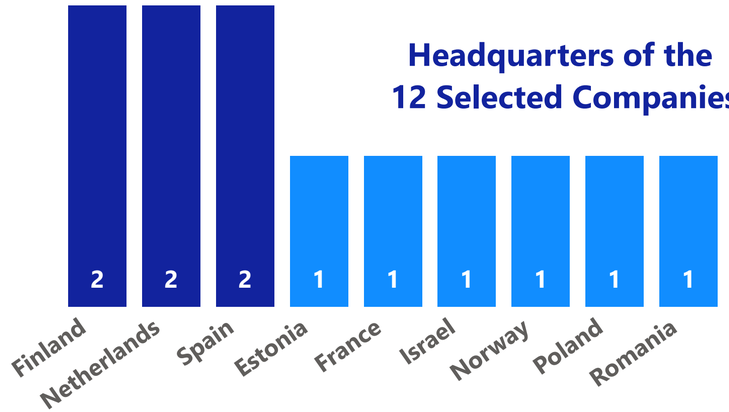
Summary Data

Market Group: **Next-Gen Computing**

12 Number of Selected Companies



108 Active Investors

Total Amount Raised

341.47 M

Average Raised per Company

28.5 M

Average Raised per Round

4.9 M

Data as of 21 March 2024

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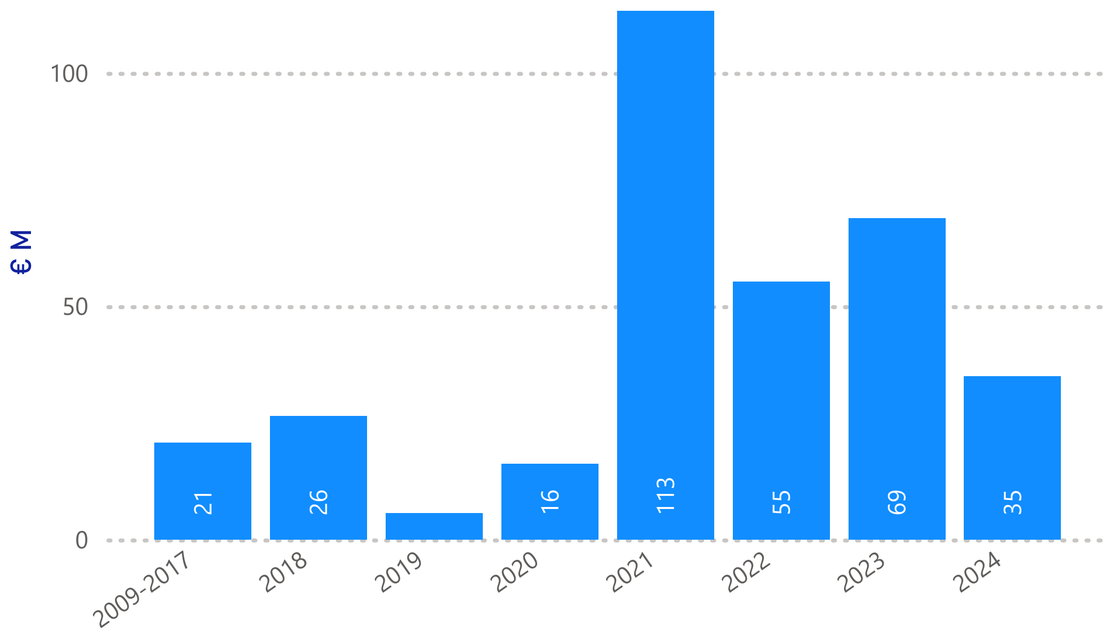
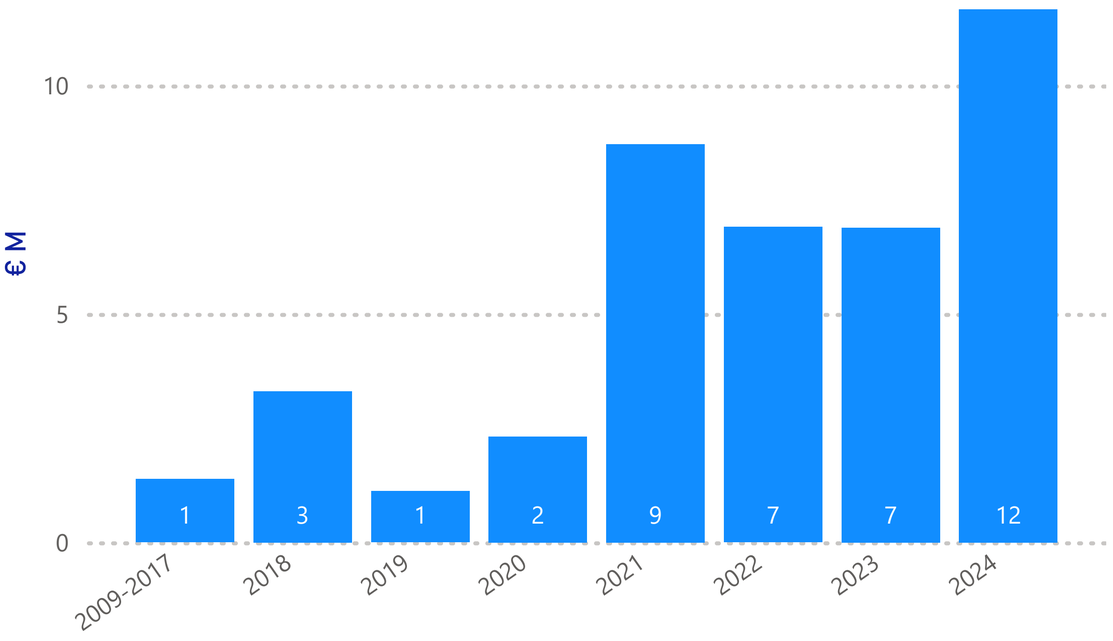
Investments Raised to date

Market Group: **Next-Gen Computing**

Amount Raised (in € M)



Average Round (in € M)



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Stakeholder Members

Market Group: **Next-Gen Computing**

Investors

Armilar

ATLANTIC BRIDGE

Bosch Ventures
BOSCH

CATALYST ROMANIA
Early Growth Investor

TRUMPF

VIGO VENTURES

Jolt Capital

MIG CAPITAL

!ndustrifonden

PMV
Vlaamse investeringsmaatschappij

IRON HANDS CAPITAL

WORLD FUND

Corporates

indra

intel ignite

Infineon

SIEMENS

Agencies & Gov.

The Research Council of Norway

SPRIN-D

FFG
Promoting Innovation.

altum
Attīstības finanšu institūcija

ANI AGÊNCIA NACIONAL DE INOVAÇÃO

Tesi

TNW

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Stakeholders seen on this slide have given consent for use of their logos.
For the full list of Stakeholders kindly contact your Group Manager

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Selection Process

Market Group: **Next-Gen Computing**

Minimum Criteria

1. Total Previous **Funding :** Min € 7.5 million or Min € 5.0 million in Horizon Europe widening countries and Associated Countries equivalent of R&I performance

2. Latest round of **Funding** after 1st Jan **2019**

3. Headquartered EU27 + Horizon Europe Associated countries

4. Within the **Scope** of 1 of 10 Market Opportunities

Review Criteria

1. **Management** Experience
2. Product / **Technology** Merit
3. Go to **Market**/Strategy
4. **Competitive** Position
5. **Investment** potential
6. **Presentation** Quality

Important to consider

7. **Women** in Management

Selection

Steps

A. Reviews by investor and corporate Stakeholder Members on Criteria

B. Collective call to review the ranking by all Group Stakeholder Members

Composition Group of 12

- Min. 50% EIC companies
- Min. 2 companies from CEE
- Min. 2 companies from SE

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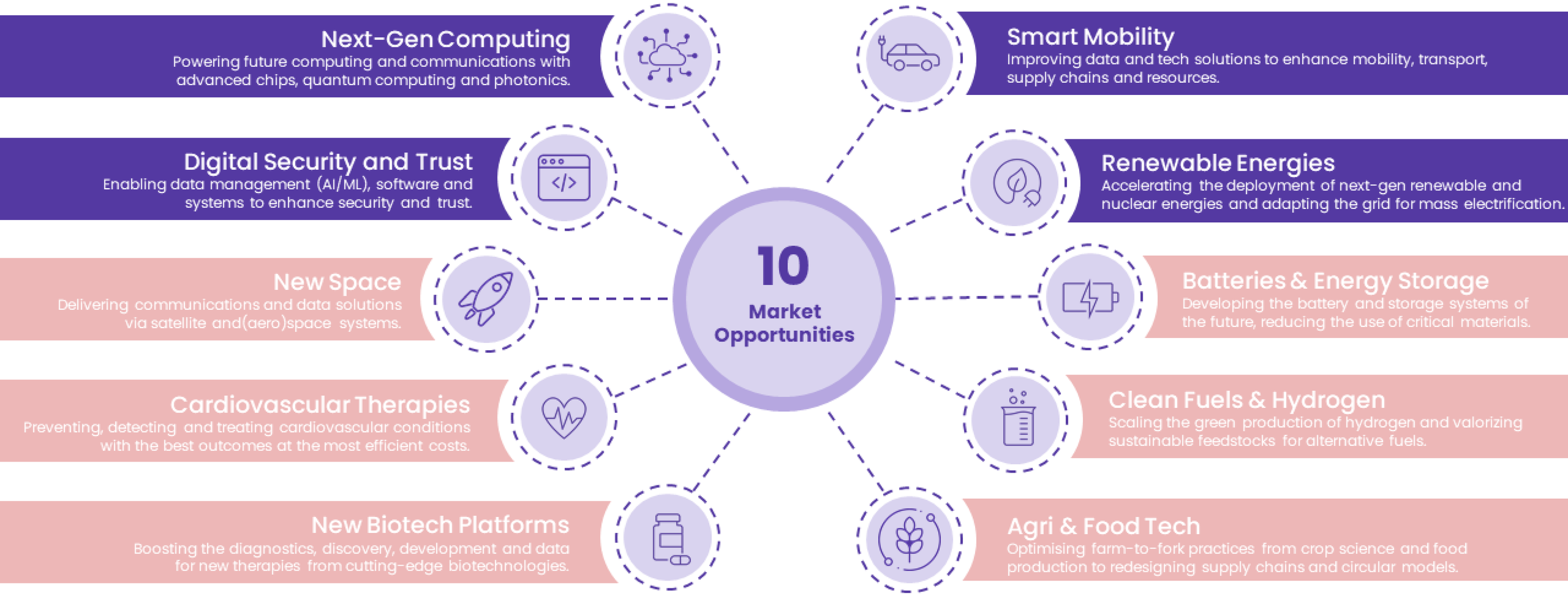
4 out of 10 Market Groups



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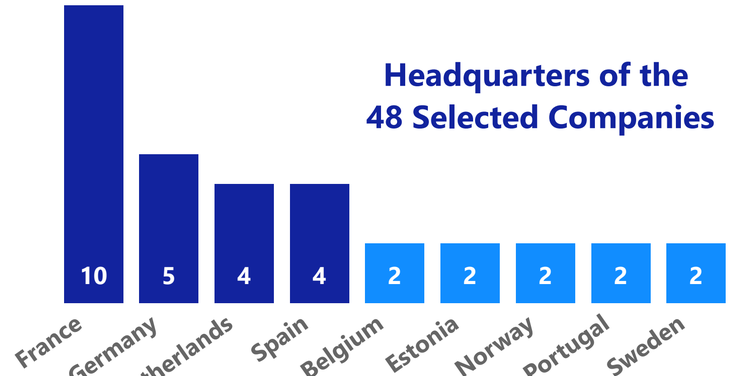
Summary Data

4 Market Groups = 48 Member Companies

48 Number of Selected Companies

Headquarters of the 48 Selected Companies



414 Active Investors

Total Amount Raised

1.37 Billion

Average Raised per Company

28.5 M

Average Raised per Round

6.1 M

Data as of 21 March 2024

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About the EIC Scaling Club

European deep tech scale-ups have the potential to make a massive positive impact on the world.

United, we can turn that into a reality.

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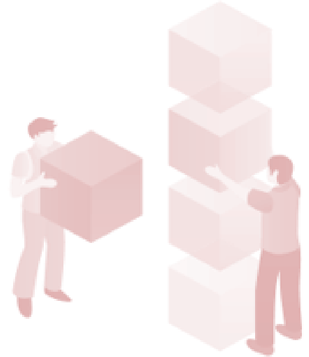
We are on a mission to boost and showcase Europe's deep tech excellence

100

Select deep tech companies



€1B

Growing their valuations beyond

" **Building word-class businesses** with deep solutions for **global challenges** "

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Market Groups

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Legend: Digital-related markets · Health-related markets · Climate-related markets

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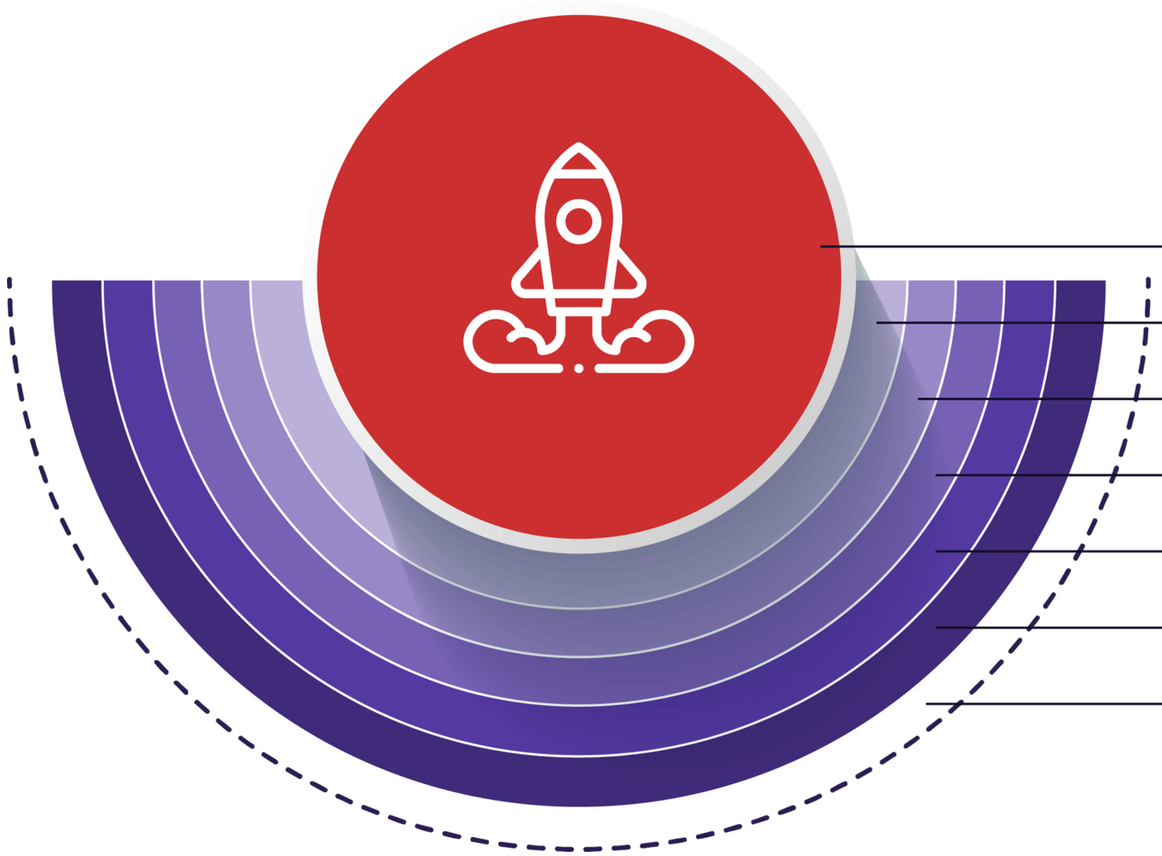
Collaborate to grow value



100+ Companies
Grow your business and value

Mentors guide the leadership and board

Investors lead (co-)investments

Corporations grow new markets

Government Agencies boost champions

Member States foster competitive ecosystems

The Network of financiers, partners and talent seeking opportunities

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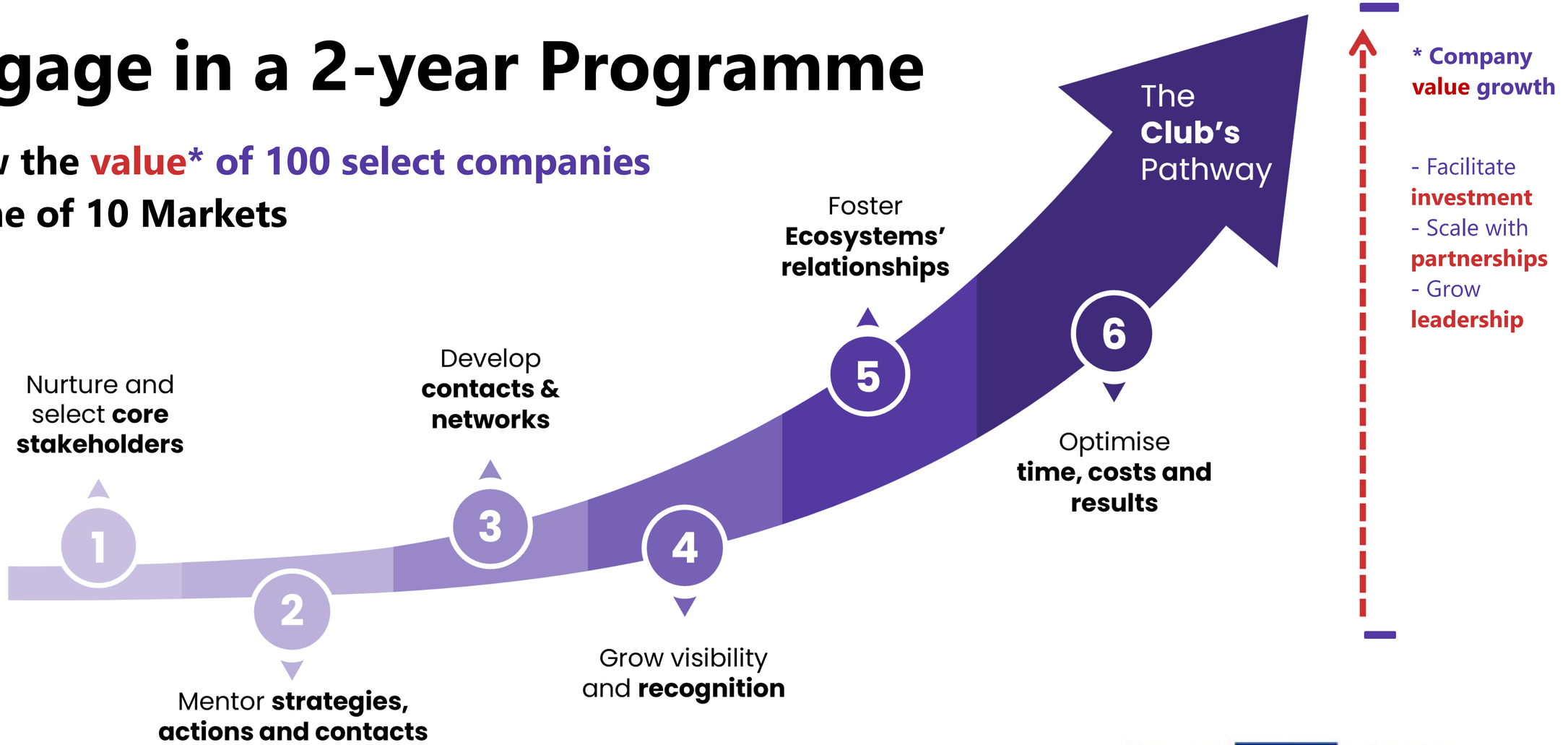
Engage in a 2-year Programme

Grow the value* of 100 select companies in one of 10 Markets



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