



# Enhancing Public & Private Financing

ShapingBio Summit

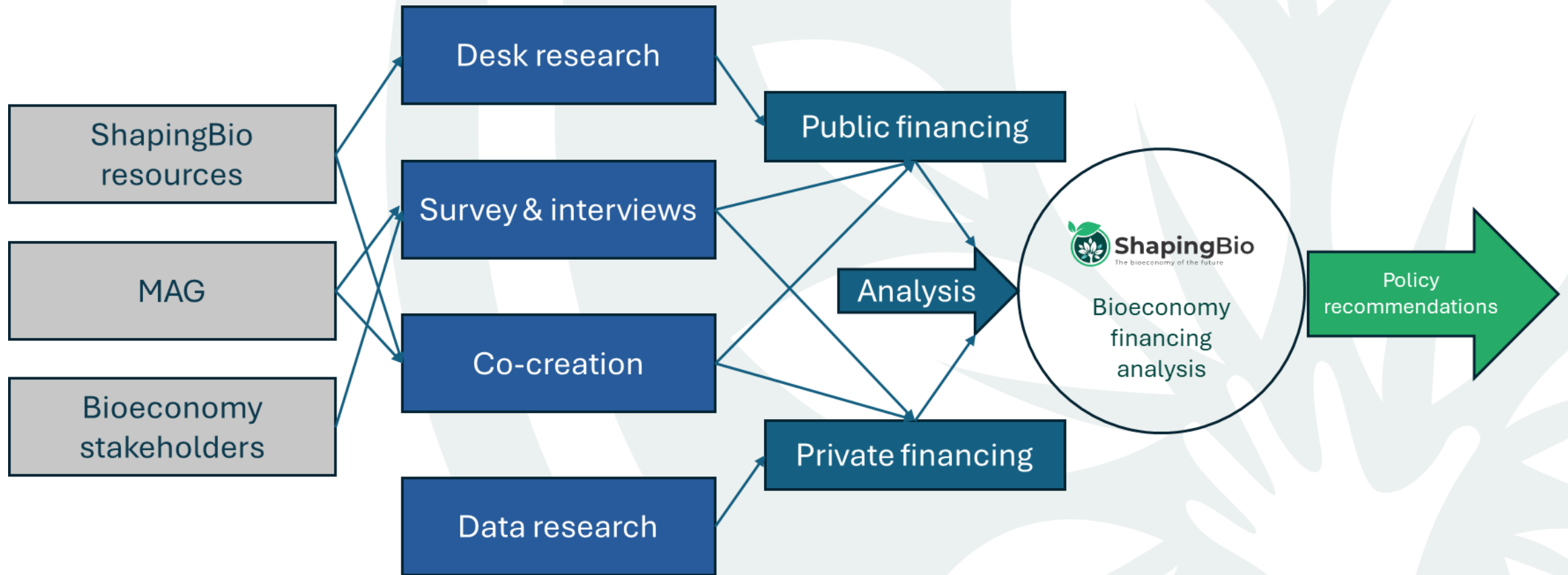
25 June 2025, Brussels

# ShapingBio BEF Analysis



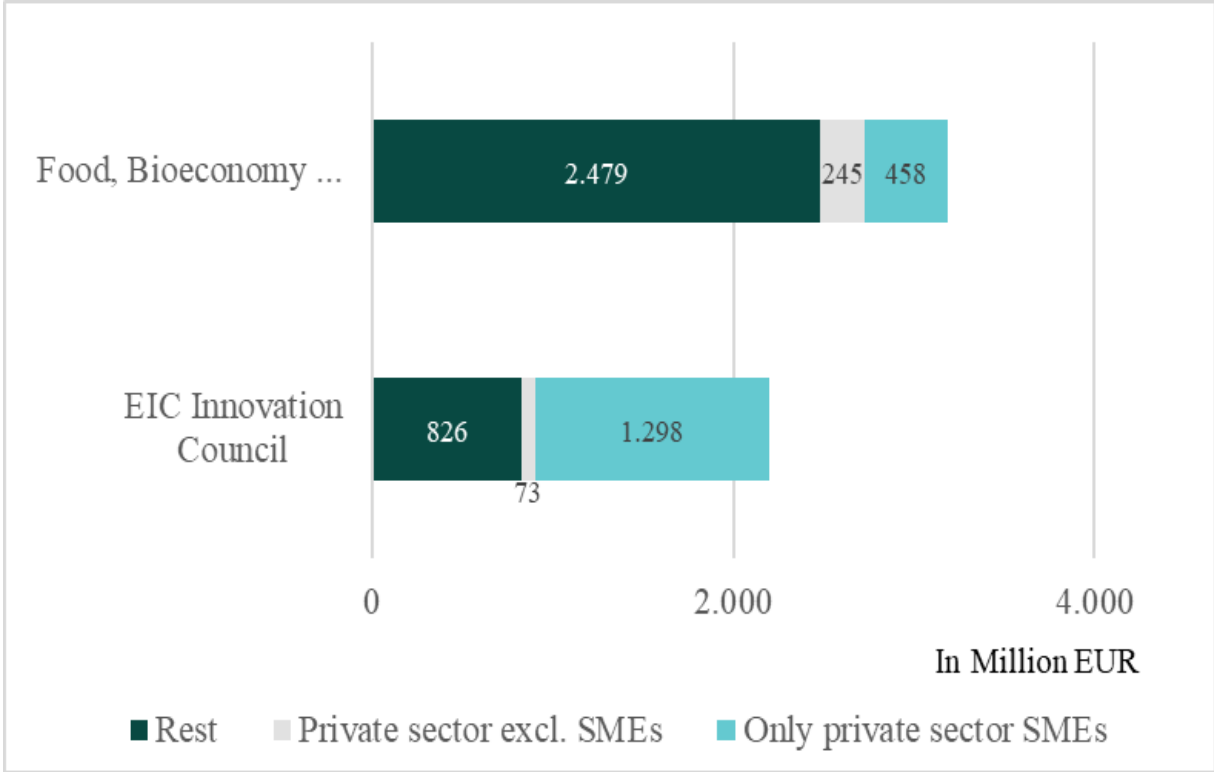
# Bioeconomy financing analysis (BEF) – Methodology

**Objective:** analyse the opportunities and challenges of private and public financing for companies in the EU bioeconomy.

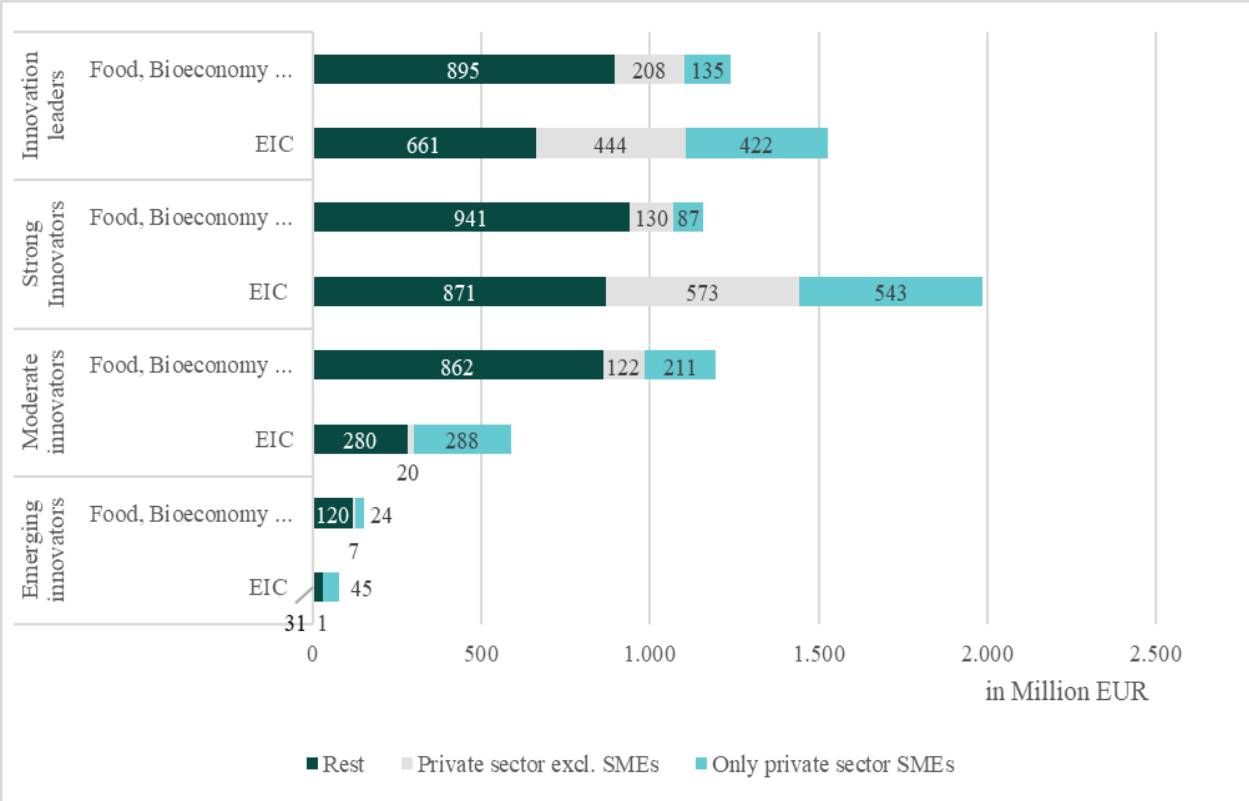


# BEF Analysis – Public Financing – EU level

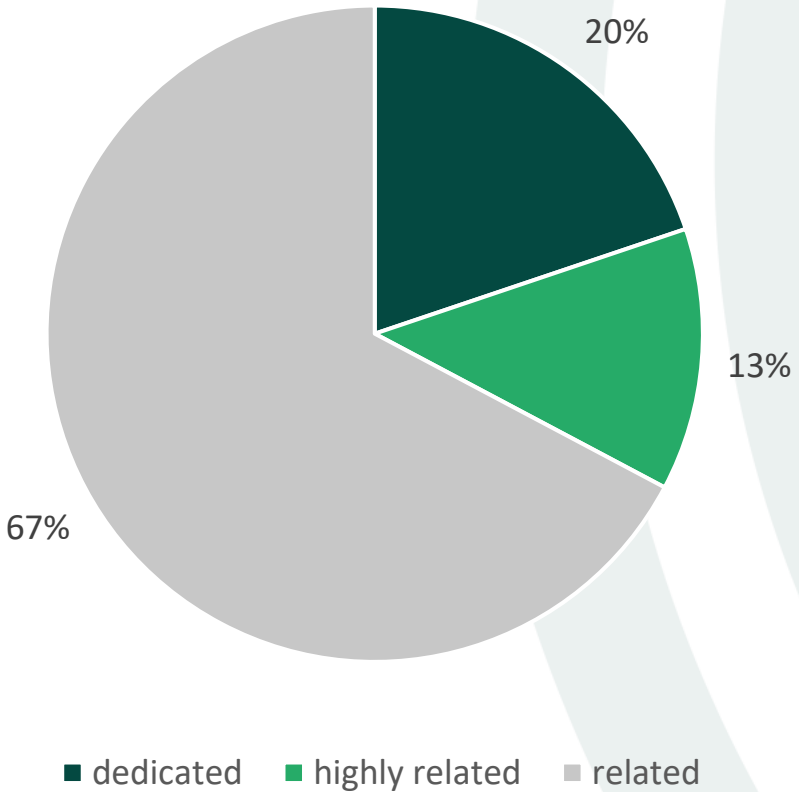
Received funding CL6 HE



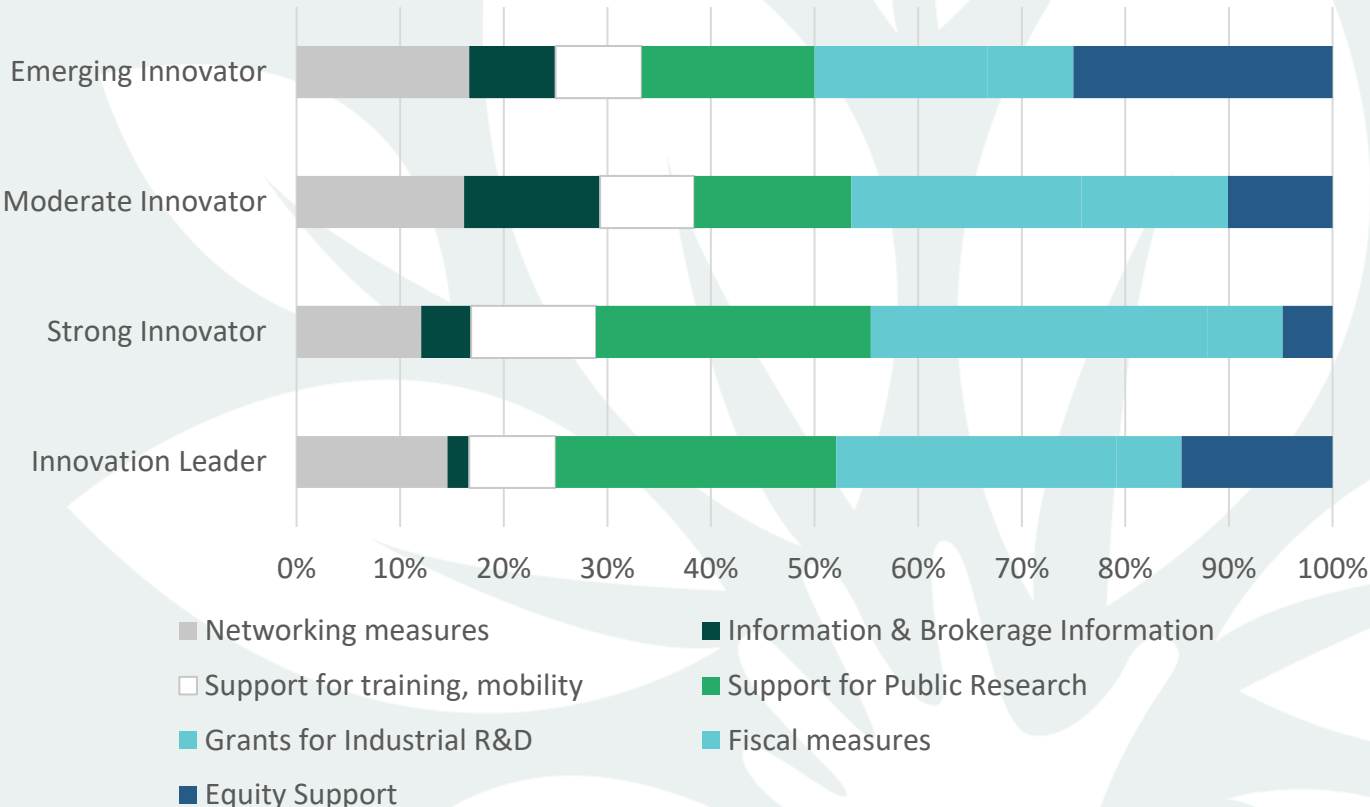
Received funding CL6 HE – innovation groups



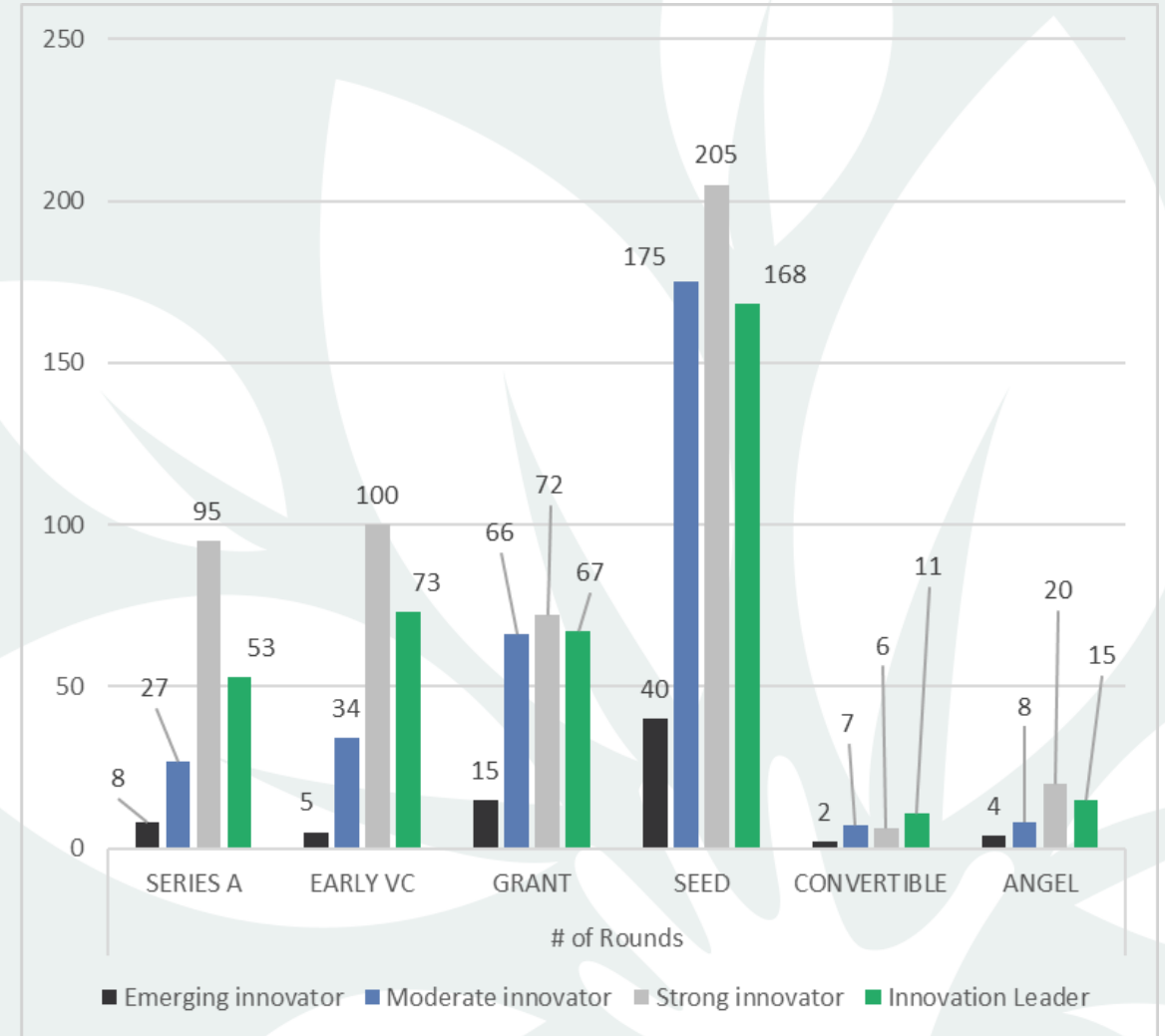
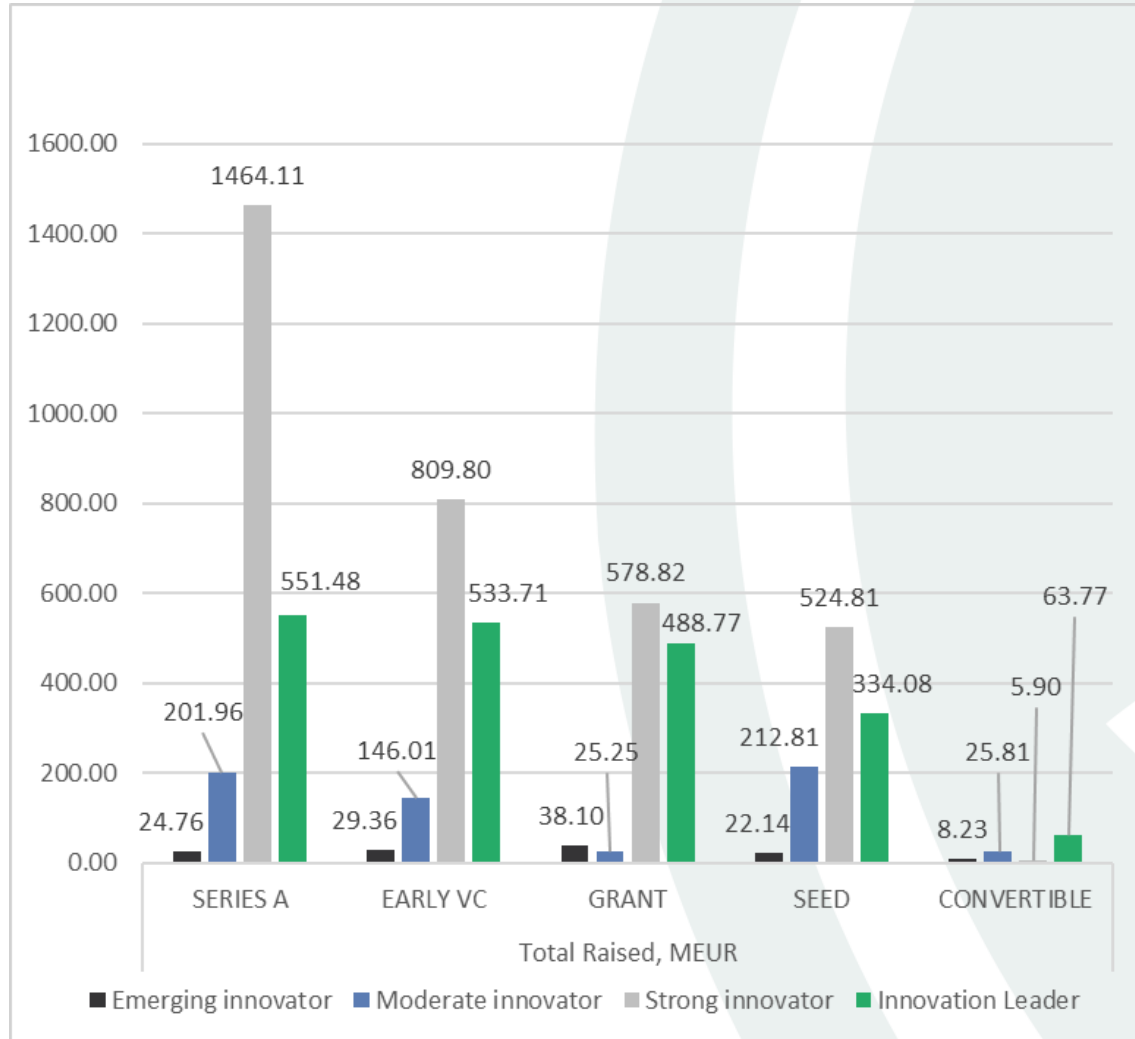
National programmes for BE



Supporting measures

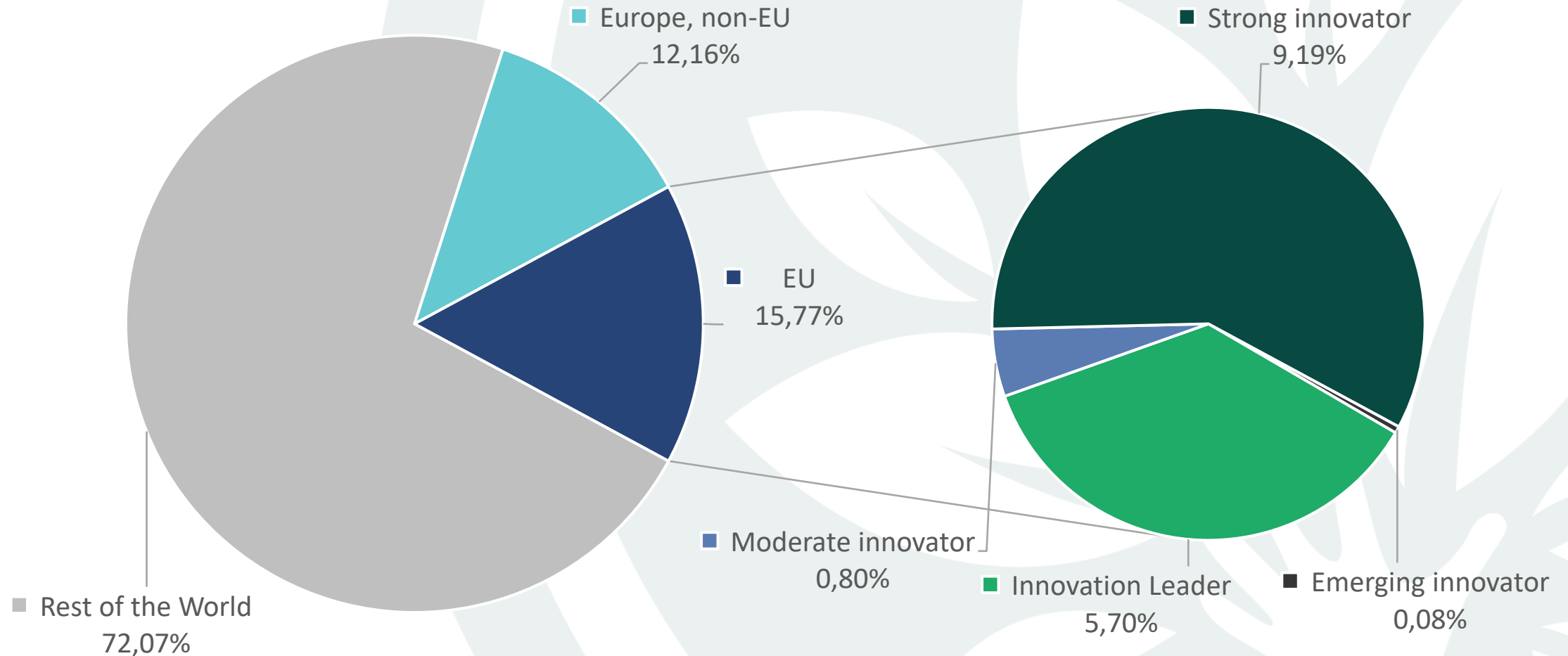


# BEF Analysis – Private Financing – early stage



# BEF Analysis – Private Financing – investors' HQ

Investors in the EU bioeconomy – by financing amounts



- **Commercialisation bottlenecks**

Limited support for business modelling, investor matchmaking, IP transfer, and other soft infrastructure critical to scaling innovations; stakeholders unfamiliar with financing/de-risking opportunities PPP

- **Funding design gaps**

Emphasis on short-term KPIs, insufficient funding per project, limiting support for commercialisation costly scale-up phases (e.g., pilot plants, FOAK facilities).

- **Regulatory complexity**

Complex regulatory landscape limiting market entry, strains SME scaling capacity and hinders investment (higher risk for new products compared with fossil-based)