



Market Roadmap Next-Generation Computing

European
Innovation
Council



Funded by
the European Union

Partners:



- 1. Executive summary**
- 2. Club group overview**
- 3. Roadmap data and insights** across 7 market areas
- 4. Methodology, select reports** & acknowledgements
- 5. Recording** of live workshop presentation
- 6. Self-assessment Roadmap** tool

Introduction & group overview



Dear Club Member and reader,

We are privileged to work with the Members of the Market Group Next-Generation Computing of the EIC Scaling Club. Our only aim is to **add value** to the 12 select Company Members and to promote them.

Therefore, the purpose of this Roadmap is to allow the Company Members to **reflect upon their market strategy and position** going forward in the next 2 years, coinciding with their Club Membership term.

To do so, the Roadmap assesses **where Club Company Members are now and aim to go in the next 2 years**. It also **benchmarks** their positions and plans with the views of their Group's Stakeholder Members, including over 30 specialised mentors, investors, corporations, governmental agencies and clusters.

The Roadmap is **data-driven** but also captured the Club Members's collaborative **insights** across 7 areas.



Jean-Michel Deligny
Group Mentor President
Independent Advisor



Dona El Ferekh
Group Development Manager
Tech Tour



Denitsa Nenkova
Group Programme Manager
Tech Tour

Who is this for? And **why**?

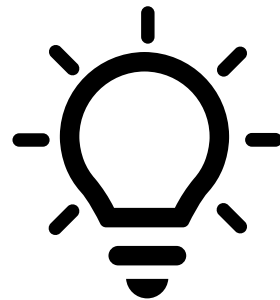
1. Scale-ups

Empowering your **go-to-market journey and strategy** in key areas with benchmarking data and select insights



2. Mentors

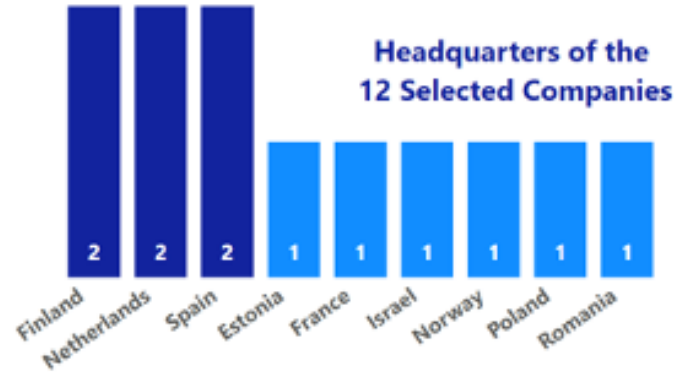
Enhancing your market insights with **new primary data** and peer and expert views



3. Stakeholders

Providing investors, corporations and clusters with **a benchmarking report** for their staff, partners and clients





Next-Generation Computing

Market Group

Contributors Market Roadmap

Club *Stakeholders* Members

Club *Company* Members

Investors



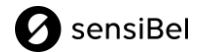
Corporates



Institutions



Companies



Next-Generation Computing

Market Group

Mentor Members



*Jean-Michel
Deligny*



Kaija Poysti



Sam Guillaume



Jasmin Gungor



Marek Kotelnicki



Selma Prodanovic



Christian Dupont



Maria Costeira



Markus Bohl



Maria Luisa Garcia Garcia



Andreas Umbach



Mary Mckenna

Companies selected in the Next-Generation Computing Group



Quside aims to enhance secure connectivity and efficient computation for all, valuing the pursuit of strong cryptographic solutions and computing platforms.



.lumen is creating glasses that empower blind individuals to navigate the world more effectively.



Multiverse Computing utilizes quantum and quantum-inspired solutions to address complex challenges in a variety of sectors.



Dispelix Oy is developing revolutionary see-through display technology for extended reality glasses.



Basemark is a pioneer in providing software and tooling solutions for cutting-edge automotive AR development.



GScan leads the world in cosmic-ray muon tomography, innovating in 3D scanning and chemical composition analysis.



SensiBel is pioneering the next generation of MEMS microphones with its deep-tech optical readout technology.



Axelera AI is revolutionizing computer vision technology with its advanced hardware acceleration.



QuiX Quantum is dedicated to building Europe's quantum computing infrastructure.



Quobly is developing cost-effective universal quantum processors that tackle unsolvable problems across various sectors.

Roadmap Data & Insights

across 7 market areas



Key Data & Insights Future Market Roadmap



1. Expect a focus on specialized applications, beyond mere technological prowess



2. Sales within the industry will remain top but manufacturing and automotive overtake sales to research



3. Sales across Europe and especially the US / North America will prevail as China drops to the bottom of the list



4. Direct sales will still dominate, yet indirect sales will become increasingly relevant



5. Raising funding or investment remains the top challenge



6. Main competitors will be well-funded American companies and internal solutions from customers



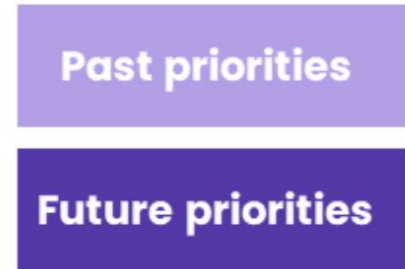
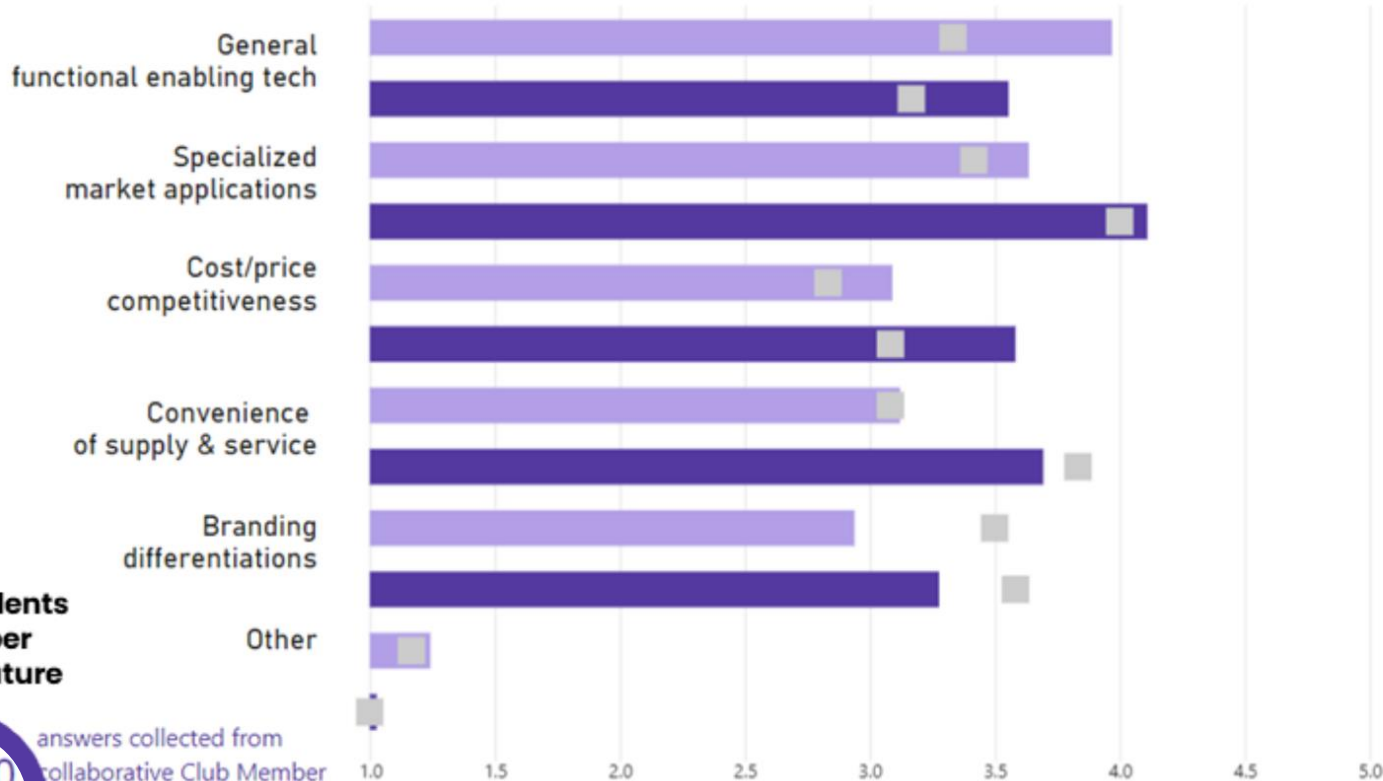
7. Venture capital is expected to remain the **main source of funding**

Next-Generation Computing

Market Group

How to read and interpret results?

Example



All Respondents



Respondents Number
Past | Future



Answers collected from collaborative Club Member sessions

Ctrl. + Select = Multiple Choice

Stakeholder Type

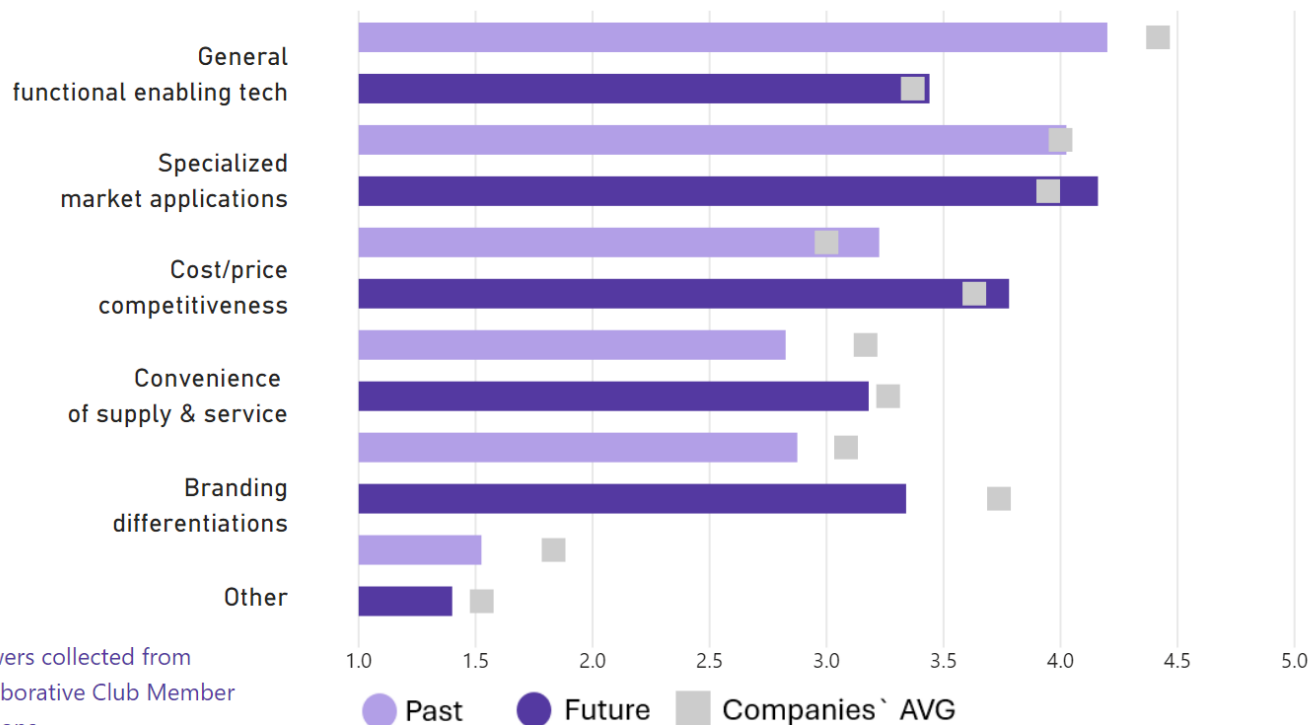
All

Past_Future

All

Market Needs - Past vs. Future

where 1 is "Least Important" and 5 is "Most Important"



40 | 50
Past | Future

answers collected from collaborative Club Member sessions

Please observe that the less stakeholders' types you select in the filter, the sample may no longer be representative

Future Roadmap Findings

- ✓ Growing a **specialised application is essential**, beyond tech abilities
- ✓ **Cost/price competitiveness and convenience of supply & service are more crucial** for Club members in the future
- ✓ Building a **strong brand** in the market is **more important to companies than stakeholders**

“Defining and evaluating specific applications/markets for a deep tech product is important to find a good beach-head entry market.”



Serban Mogos
Investment Manager
TRUMPF Venture

“For us, product-market fit, branding, pricing and knowledge about the market will become more relevant in the future.”



Andi Hektor
Chief Strategy Officer
GScan

“Working jointly with various stakeholders (end users, direct customers & supply chain partners) is key to enable paradigm shift in the market from general functional enabling tech to specialized market applications.”



Olivier Rousseaux
Director of Venture Development
IMEC

Ctrl. + Select = Multiple Choice

Stakeholder Type

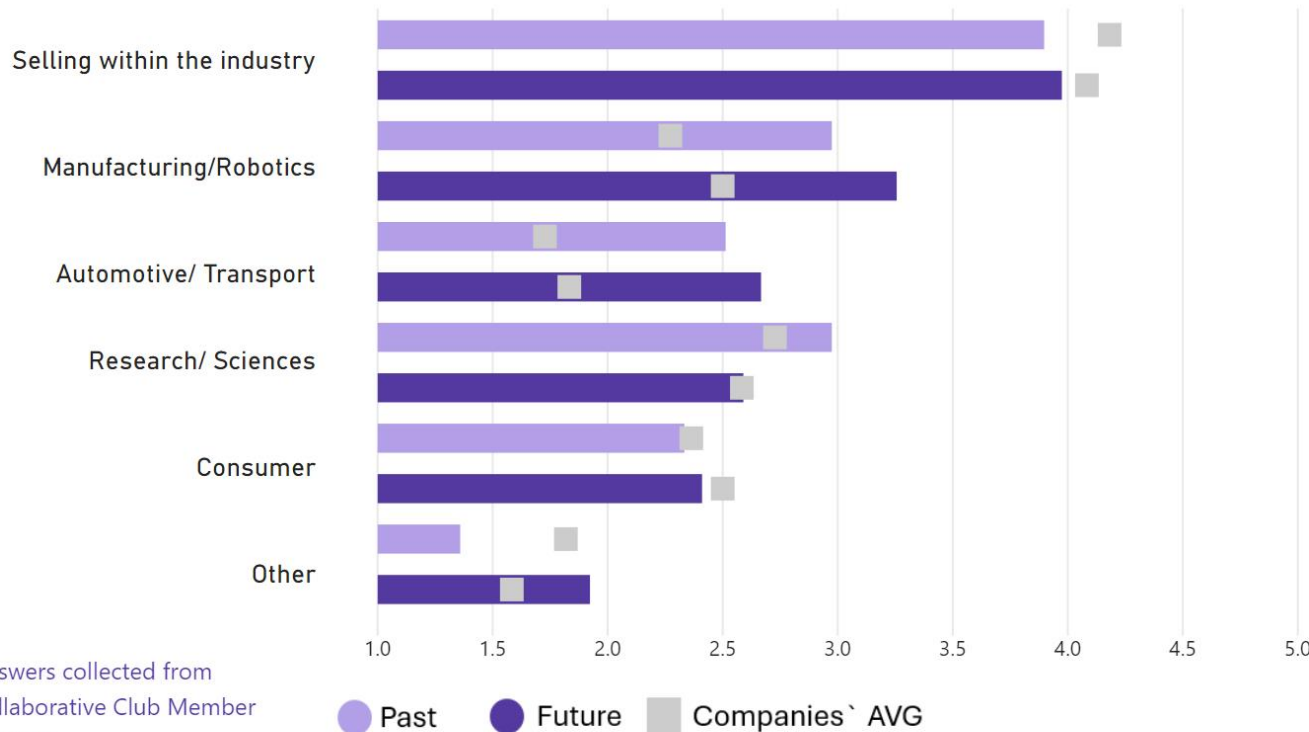
All

Past_Future

All

Sales Industries - Past vs. Future

where 1 is "Least Important" and 5 is "Most Important"



39 | 39
Past Future

answers collected from collaborative Club Member sessions

● Past ● Future ■ Companies' AVG

Please observe that the less stakeholders' types you select in the filter, the sample may no longer be representative

Future Roadmap Findings

- ✓ Selling within the industry will **remain a priority** for Next-Gen companies
- ✓ **Robotics and Manufacturing** applications are priorities for stakeholders but not for companies
- ✓ The **Automotive and Transport** industries **are more of a focus for stakeholders** than companies

“Automotive is massive but high risk as you either get it or you don’t but you spend a lot of time and money either way.”



Hugh Brown
Chief of Staff
Axelera AI

“You go for the industry which is seen as the low-hanging fruit. Whoever is waiting in front of your door and whom you can sell to quite fast.”



Gitte Bedford
Vice President
Robert Bosch
Venture
Capital

“Data center technologies are key, that’s where the big money is.”



Jean-Michel Deligny
President and Mentor
EIC Scaling Club

Ctrl. + Select = Multiple Choice

Stakeholder Type

All

Past_Future

All

Sales Geographies - Past vs. Future

where 1 is "Least Important" and 5 is "Most Important"



35 | 41
Past Future

answers collected from collaborative Club Member sessions

Please observe that the less stakeholders' types you select in the filter, the sample may no longer be representative

Future Roadmap Findings

- ✓ **Europe and North America are the key growth markets** for companies in the future
- ✓ **South & East Asia is an important market to address** in the future for to companies, as opposed to investors whose focus is on the US
- ✓ Companies and stakeholders have both **deprioritized the Chinese market**

“The US is still the single biggest market for fast adoption, and it is a must have market to trigger trade sale or an IPO.”



Susanne K. Schorsch
Partner
Amadeus Capital Partners

“You must be cautious on how you're going to sell in China. Your best defense is your innovation.”



Maxime Mallet
General Partner
Jolt Capital

“For us, accessing US customers will in help winning US investment”



Kathy Willing
Chief Financial Officer
Quix Quantum

Ctrl. + Select = Multiple Choice

Stakeholder Type

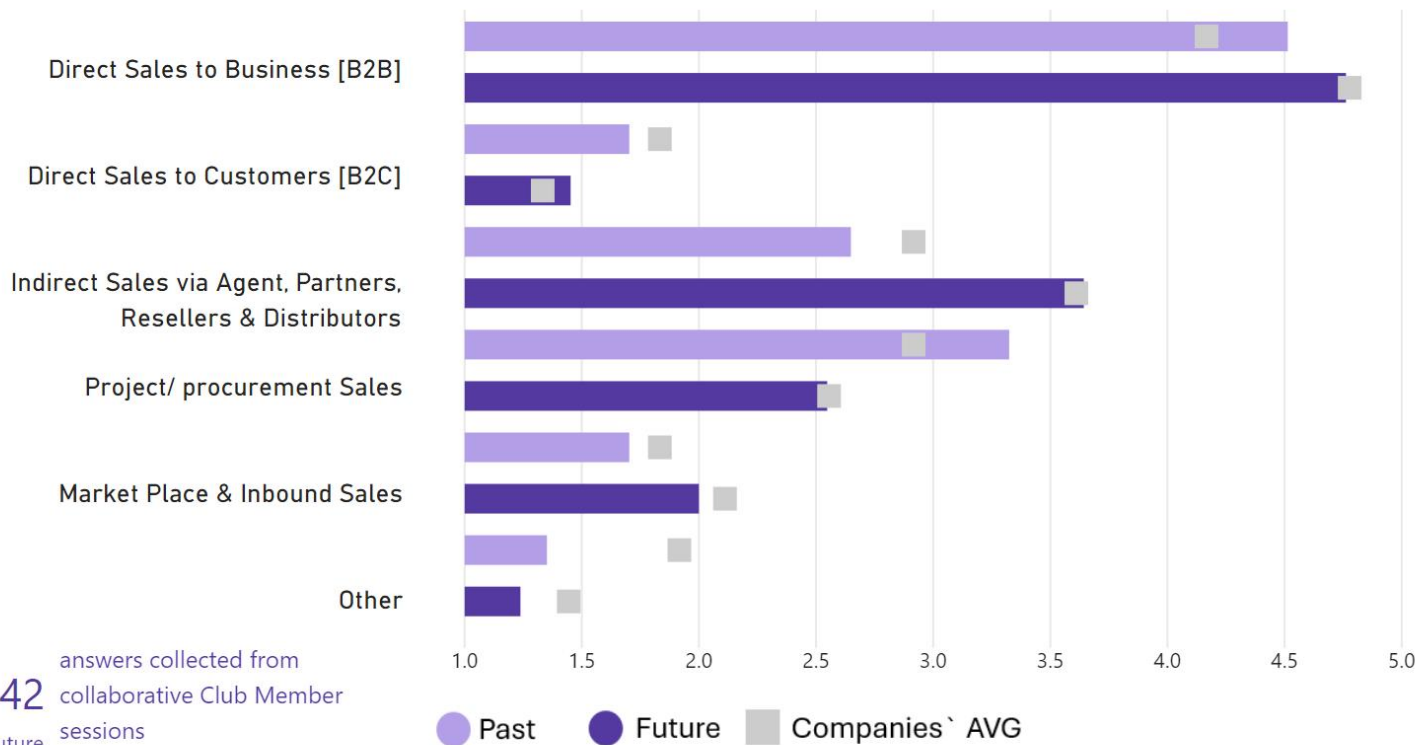
All

Past_Future

All

Customer Channels - Past vs. Future

where 1 is "Least Important" and 5 is "Most Important"



37 | 42
Past Future

answers collected from collaborative Club Member sessions

● Past ● Future ■ Companies' AVG

Please observe that the less stakeholders' types you select in the filter, the sample may no longer be representative

Future Roadmap Findings

- ✓ **B2B is the priority customer channel** for all
- ✓ **Indirect sales** holds promise for companies and stakeholders **in the future**
- ✓ Project/procurement sales is **more important to stakeholders than companies**
- ✓ **Market place & inbound sales** is seen as not significant, particularly by stakeholders

“Having a balance between B2B sales and distribution channels is essential in order to lower your risks”



Nadia Serina

*Strategic E&D Agreements
Manager*

ST Microelectronics

“Direct sales is key to understand customer pains and customizing the product. Afterwards you can move to indirect sales once the product is more standardized.”



Lamin Ben-Hamdane

*Head of Start-up Cooperation
and Partnerships*

Infineon Technologies

“Public procurement can be a big help for start-ups to build trust and accountability.”



Samira Nik

*Program Manager for
Quantum*

EIC

Future Risks or Challenges - Next-Generation Computing

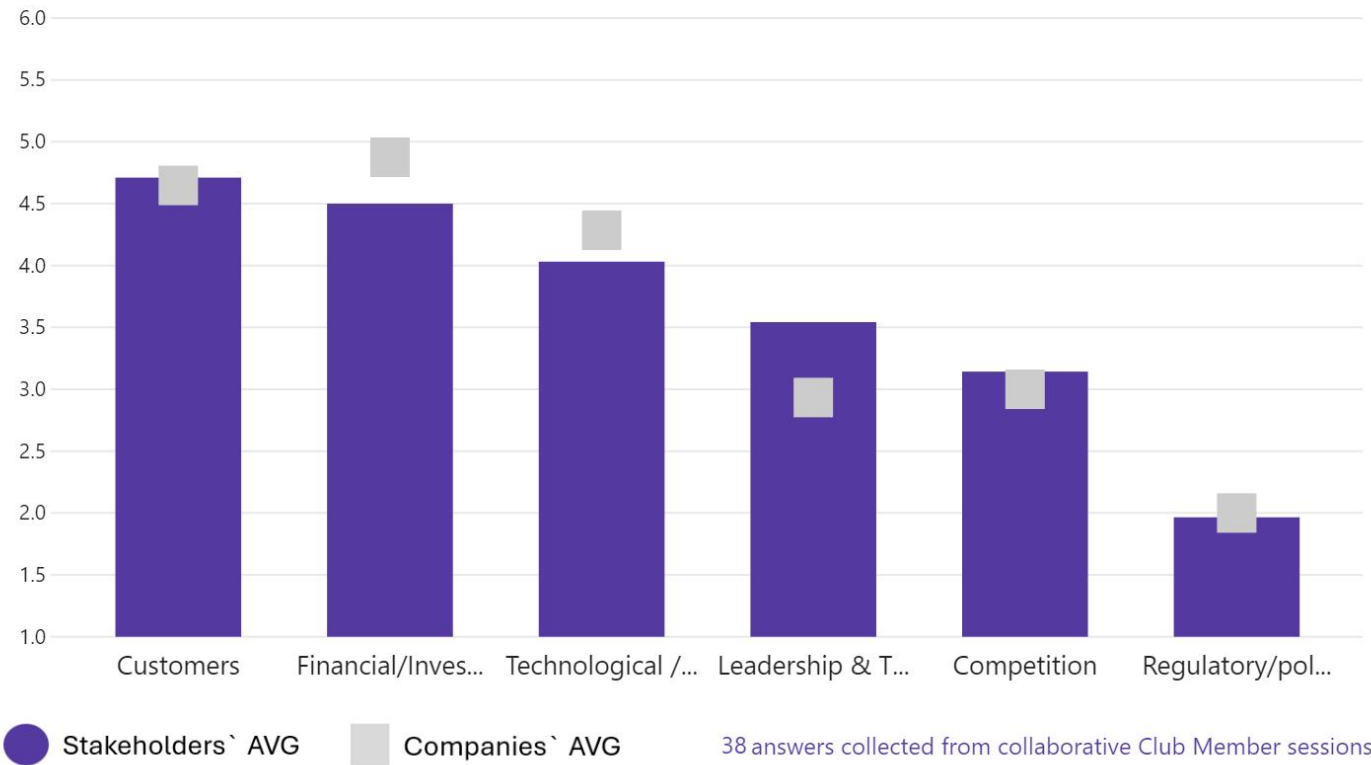
Ranking - 1 is "Least Important" and 6 is "Most Important"

*It is a ranking that has been recalculated to an absolute value

Ctrl + Select = Multiple Choice

Stakeholder Type

All



Future Roadmap Findings

- ✓ Financial Investment is seen as the **biggest challenge** for all members
- ✓ **Acquiring customers and technology manufacturing** are the other two challenges of high importance for companies
- ✓ Regulatory/policy is the **lowest priority** for club members.

“Without access to funding all other challenges have no meaning. Tech advancements are possible only with funding.”



Kathy Willing
Chief Financial Officer
Quix Quantum

“Customers and financial investment affect each other. If you solve your customer challenge, it will be easier to gain traction for investment.”



Ion Hauer
Principal
APEX Ventures

“Investment, customers and legalities should be all considered from the very early stages. Plan ahead to protect yourself.”



Marta Garcia Cid
Senior Engineer
Indra

Next-Generation Computing

Market Group

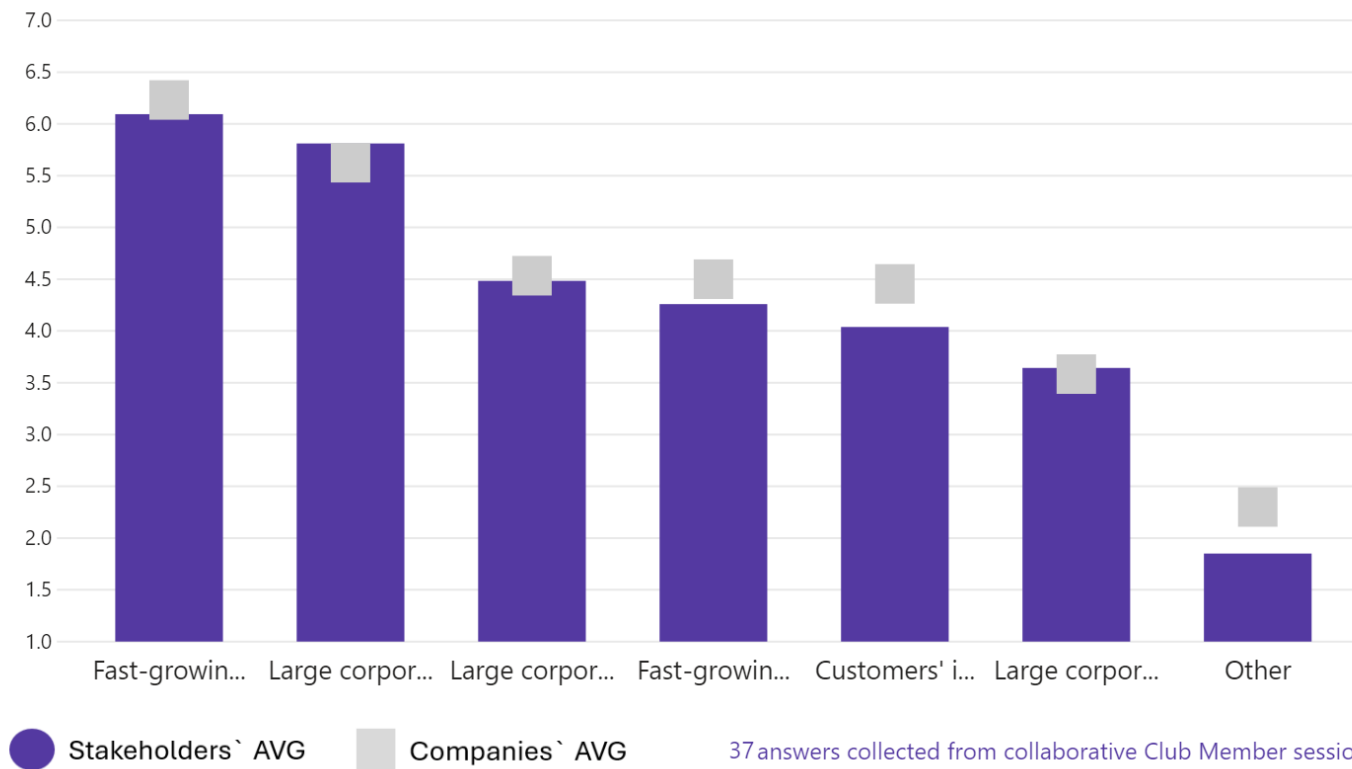
Ctrl. + Select = Multiple Choice

Stakeholder Type

Future Competition - Next-Generation Computing

Ranking - 1 is "Least Important" and 7 is "Most Important"

*It is a ranking that has been recalculated to an absolute value



Company Competition

Market Roadmap Data Benchmark 6/7

Future Roadmap Findings

- ✓ 90% of respondents see US actors (scale-ups and corporates) **the biggest competitors**
- ✓ **Customers' internal solutions and Chinese corporations** are also viewed as strong competitors
- ✓ **Companies view fast-growing European scale-ups as competitors**, while stakeholders do not

“US large tech may seem scary, but it is surprising how well VC backed European companies can compete technologically.”



Juha Lehtola
Head of Direct VC Investments
Tesi

“Big US corporates have very deep pockets to sell the idea that they are the best, and this poses a big risk.”



Andrea Busch
Chief of Staff & BD
Quobly

“It is imperative to consider internal competition from the consumer themselves.”



Sam Guillaume
Founder
Latitude 45

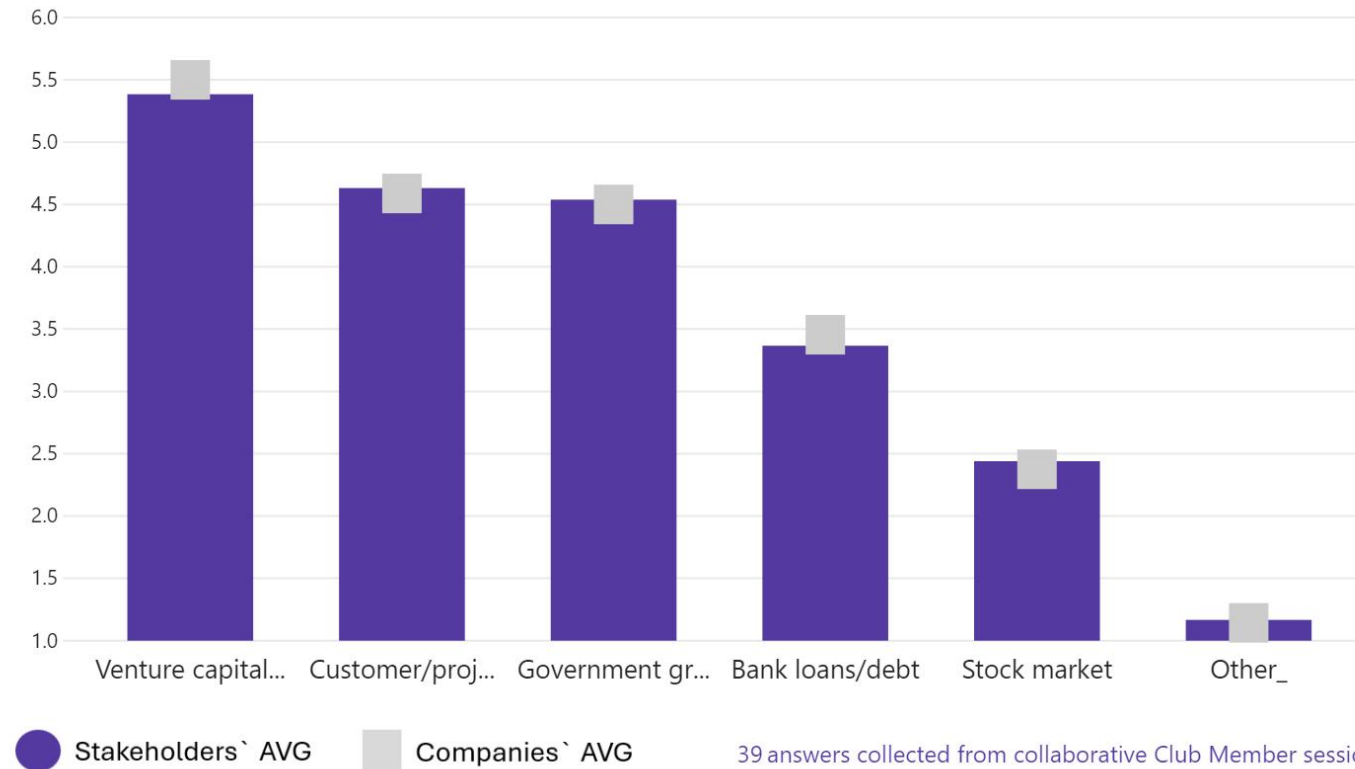
Ctrl. + Select = Multiple Choice

Stakeholder Type

Company Funding - Next-Generation Computing

Ranking - 1 is "Least Important" and 6 is "Most Important"

*It is a ranking that has been recalculated to an absolute value



Future Roadmap Findings

- ✓ Club members identify **VC/PE funding** as the highest priority
- ✓ Customers, projects, and government grants/research are also **top sources of funding**
- ✓ Companies **do not see stock market** as an important funding option compared to stakeholders

“Know how to bring value with the additional funding sources beyond VCs. Big ambition + great execution = funding”



Marek Kotelnicki
Managing Partner
VIGO Ventures

“**Cap tables remain a key issue** for growth companies to scale, especially in the hardware space.”



Martha Ivanovas
Deal Flow and Portfolio Manager
Intel Ignite

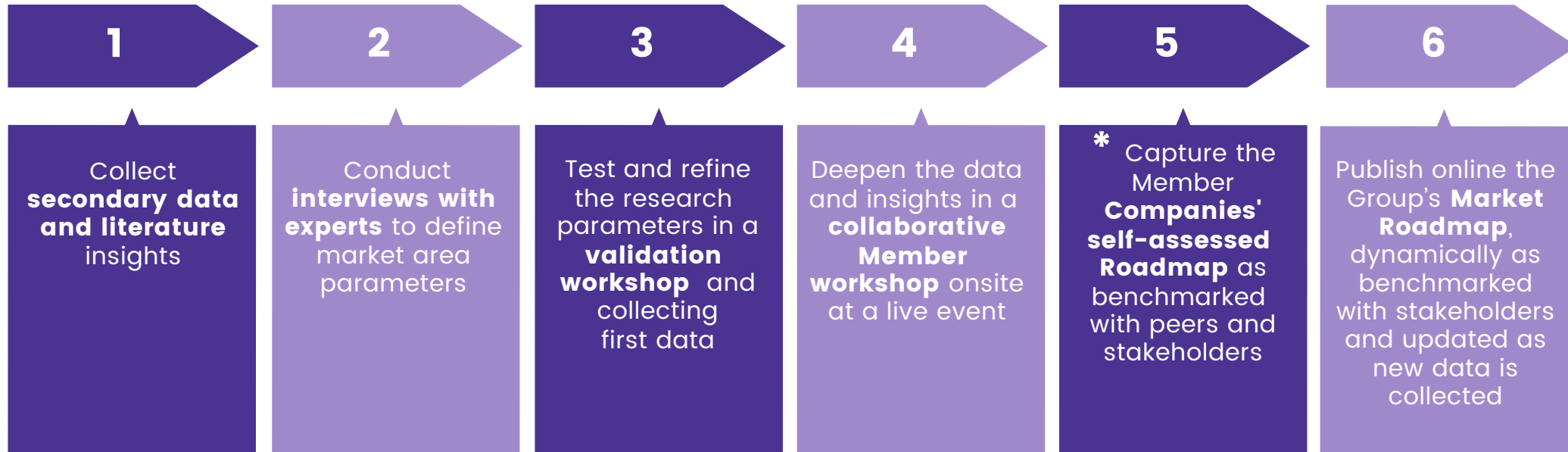
“You can get substantial funding from the customer through joint projects and product revenue. Investigate how early you can make that happen.”



Olivier Rousseaux
Director of Venture Development
IMEC

Methodology, additional reports & acknowledgements





- * Member **Companies** can :
- Reflect on their market roadmap **focus**
 - **Share** with colleagues, advisors or Mentors
 - Assess in the future their Roadmap's **accuracy**

Selection of additional reports, publications to go further

- [1. Five Game Changing Technologies Nearing their Tipping Point](#)
- [2. State of Quantum Report](#)
- [3. Next-Generation Computing Roadmap](#)

Other Market Roadmaps of the EIC Scaling Club

MR Digital Security & Trust

MR Renewable Energies

MR Smart Mobility

Scaling Challenges Roadmap of the EIC Scaling Club

In addition to Market Roadmaps, the EIC Scaling Club consortium produced a series of reports dedicated to help companies solve their specific challenges to scale, based on literature review and workshops with experienced professionals.



Sam Guillaume
Founder
Latitude 45



Olivier Rousseaux
Director of Venture
Development
IMEC



Maxime Mallet
General Partner
Jolt Capital

Roadmap Recording





Self-Assessment Roadmap



We invite **you** to self-assess
Your Company Roadmap

1. **Click** on the QR code on the right
2. **Take** the Roadmap mentimeter **survey** - it takes max 10-15 mins
3. Gain **your Roadmap response immediately after** - fill in your e-mail



EIC Scaling Club

EICScalingClub.eu

For more information reach out to:
itchetinova@techtour.com

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Thank you!

