EUROPEAN CLUSTER COLLABORATION PLATFORM

Life Sciences and Biotech in Europe: Policies, Clusters, and the Road Ahead

Summary

EU Clusters Talks
5 November 2025, 8:30 – 9:45 CET

An initiative of the European Union

Life Sciences and Biotech in Europe: Policies, Clusters, and the Road Ahead

The European Cluster Collaboration Platform, on behalf of the European Commission, hosted the EU Clusters Talk "**Life Sciences and Biotech in Europe: Policies, Clusters, and the Road Ahead**" on 5 November, from 8:30 – 9:45 CET. The session outlined the main elements of the evolving European policy framework, discussed the role of clusters as connectors in the life sciences and biotech ecosystem, and provided insights into priorities for future EU regulation.

Agenda of the meeting

Moderation: Zivile Kropaite

1. News from the European Cluster Collaboration Platform
   Nina Hoppmann, team member of the European Cluster Collaboration Platform
2. Choose Europe for life sciences: A strategy to position the EU as the world's most attractive place for life sciences by 2030
   Ferenc Marofka, Policy Officer, DG GROW, European Commission
3. Panel debate
   Ann Van Gysel, CEO, Biovia
   Iris Öhrn, Investment Advisor – Life Science /Healthcare, Business Region Göteborg
   Kazimierz Murzyn, Managing Director, Klaster LifeScience Kraków
   Ralf Huss, Managing Director, BioM Biotech Cluster Development
4. Funding opportunities
   Nina Hoppmann, team member of the European Cluster Collaboration Platform

Key messages

- Collaboration in Europe is strong, but clusters must go from networking to delivering measurable impact.
- Europe's life sciences ecosystem is too siloed; competitiveness now depends on cross-sector exchanges.
- The main European bottleneck is slow, fragmented validation and clinical trials; pan-European trial frameworks and early-market funding could address the issues.
- Europe must adopt and scale its own innovations and systematically share and replicate best national models across Member States.
- A shared European testbed infrastructure plus a stronger pull for long-term global capital could increase Europe's competitiveness.

1. News from the European Cluster Collaboration Platform

Nina Hoppmann, team member, European Cluster Collaboration Platform

The following news items were presented:

1. Survey to help shape the European Cluster Conference 2026
2. European Commission unveils 2026 work programme
3. Sixteen new Euroclusters selected to strengthen industrial resilience across Europe
4. ECCP Investment Survey launched to collect information on major investments attracted by European clusters for the Summary Report 2025.
5. EU consultation on public procurement; deadline 26 January 2026
6. Call for evidence and public consultation for the Advanced Materials Act; deadline 12 January 2026
7. Call for papers: Research Conference on the EU Single Market; deadline 17 November 2025
8. Streaming the SME Assembly 2025 in Copenhagen
9. Webinar "A Stronger EU Chemicals Industry: Presentation of the Action Plan" on 7 November

2. Choose Europe for life sciences: A strategy to position the EU as the world's most attractive place for life sciences by 2030

Ferenc Marofka, Policy Officer, DG GROW, European Commission

Ferenc Marofka presented the latest EC communication on life sciences, which needs to be seen within a broader political and economic context. Strengthening EU competitiveness has become a central priority for the current Commission, driven by geopolitical pressures and the growing economic gap between Europe, the United States and China. Life sciences are seen as a critical engine for growth, representing nearly 20% of EU R&I investment, millions of jobs and a sector that consistently outperforms overall GDP.

Ferenc Marofka explained that life sciences are defined broadly, spanning health, biotech, agriculture, industrial applications and environmental sustainability. Reflecting this strategic importance, the Commission has launched a series of major initiatives: the Competitiveness Compass, the Savings and Investments Union, the Critical Medicines Act, regulatory simplification packages and the EU Startup and Scaleup Strategy. Additional legislative steps are underway—including two EU Biotech Acts, revisions to medical device rules, a new Bioeconomy Strategy and reforms to pharmaceutical legislation and the European Health Data Space.

Within this wider framework, the "Choose Europe for Life Sciences" strategy serves as a non-legislative roadmap consolidating existing measures and signalling future priorities. Its goal is to make Europe the world's most attractive location for life sciences by 2030. Key objectives include optimising the research and innovation ecosystem, reducing regulatory barriers to market access, strengthening the uptake of innovation and building public trust. Around 30 actions are planned, such as improving multi-country clinical trials, supporting advanced therapies, adopting a One Health

approach and launching a European Life Sciences R&I Data Assembly to enhance the use of AI and interoperable data.

The strategy also emphasises skills development, innovation-responsive regulation and improved financing for start-ups and scale-ups. It includes steps to better connect life science companies with investors and to strengthen governance across EU institutions, Member States and stakeholders. Funding relies heavily on Horizon Europe, which provides around €10 billion annually, and Ferenc Marofka was confident that life sciences will remain a major priority in the next EU multiannual financial framework.

3. Panel debate

Iris Öhrn argued that while Europe already has strong collaboration frameworks, clusters must now shift from collaboration as an end in itself to delivering concrete impact. Drawing on 15 years of experience, she observed that European clusters remain too siloed by sector, while global competition increasingly revolves around cross-cutting technologies such as AI and quantum. She suggested that Europe should accelerate cross-sectoral cluster cooperation—combining life sciences with tech, clean tech, mobility and other fields—to tap into expertise that already exists in neighbouring sectors. As an example, she presented Sweden's new "Health Innovation City", which gathered companies from multiple industries with a shared health focus.

A further priority, she argued, is ensuring that European innovations are tested, validated and adopted within Europe itself. European life science companies are often too small and too fragile to compete globally unless their products are first implemented in their home markets. However, she recognises that integrating the life science industry with Europe's healthcare systems is difficult due to procurement rules and distinct regulatory environments. However, we could learn from successful collaboration models within Europe. Sweden, for example, has been studying Spain's more effective clinical trial environment, including mechanisms such as hospital exemptions for advanced therapies and incentives for clinicians. She proposes that systematically sharing such business models and best practices across Member States could be a practical step to strengthening Europe's competitiveness in life sciences.

Ann Van Gysel emphasised the importance of European frameworks, noting that EU strategies are essential not only for clusters but also for the companies they support. However, clusters and companies must move faster than regulation to address urgent challenges. Many promising technologies struggle to secure funding due to uncertainty, slow private capital and TRL levels that investors perceive as too risky. To make Europe a globally attractive location for life sciences, implementation of policy—rather than further discussion—is now critical. She welcomed upcoming changes to MDR and biotech regulation as steps in the right direction. She also sees a growing willingness across regions and stakeholders to collaborate more closely and push for quicker implementation.

She identified implementation, validation and clinical trials as Europe's main bottlenecks, arguing that pan-European clinical trials and targeted early-market funding are urgently needed. Without these, promising start-ups stall or leave Europe altogether. She agreed that having a much stronger exchange of successful business models and best practices across Member States is useful, noting

that countries like Spain perform significantly better in certain areas. Sharing and scaling such successes across clusters would help build a more unified and competitive European life sciences ecosystem.

Kazimierz Murzyn agreed that what matters are tangible outcomes of collaboration. To counter this, his cluster is adopting a systems-thinking approach, developing cross-cutting collaboration roadmaps around themes such as digital twins, diagnostics and ethics, and shifting focus from sector-based initiatives to outcome-driven, cross-sector solutions. Furthermore, he spoke of the importance of boosting Europe's strategic autonomy in biomanufacturing and critical technologies. Recent geopolitical tensions and the experience of the pandemic demonstrate the need for Europe to build resilient, self-sufficient value chains and develop capabilities that can withstand crises—from conflicts to future health emergencies. He argued that Europe has strong potential but must organise it more effectively through coordinated collaboration and better infrastructure. He suggested to create a pan-European network of biomanufacturing testbeds and test sites, offering innovators accessible facilities to test, validate and scale new technologies. Such a shared infrastructure is currently missing in Europe but could have great impact.

Ralf Huss made the point that Europe must actively cultivate international investor relationships and build stronger "pull effects" to attract capital into its own ecosystem. His long-established biopharmaceutical cluster has companies capable of raising up to €1 billion annually in Series B and C rounds — but achieving this requires time, focus and strong ties with the United States.

Because biopharmaceutical development involves exceptionally long timelines and high costs, he agreed on the sector's core bottleneck: clinical trial validation in Europe. He argued that Europe urgently needs an efficient, standardised regulatory framework that enables clinical trials — and therefore product validation — to happen more smoothly across the Union. He also pointed out that Europe rarely sees life science companies going public, as most scale-ups are acquired by large international corporates. To reverse this pattern, Europe must create conditions in which the entire value chain — from early research to clinical validation and market entry — can be completed on European soil. This includes attracting investors. For this, Ralf Huss highlighted a temporary window of opportunity: political uncertainty in the United States is driving renewed interest in Europe among investors, scientists and founders. Yet Europe will only benefit if it rapidly addresses its fragmentation, regulatory inefficiencies and lack of long-term investment opportunities.

4. Funding opportunities

Nina Hoppmann, team member, European Cluster Collaboration Platform

Closing the EU Clusters Talk, Nina Hoppmann shared the following examples of funding opportunities:

1. Call for proposals for health data for biotech innovation leveraging the European Health Data Space; deadline 6 January 2026.
2. Expanding Investment Ecosystems; deadline 20 January 2026.
3. Scaling up deep tech ecosystems; deadline 20 January 2026.
4. Support for Ukrainian tech SMEs and start-ups; deadline 26 November 2025.