

ANNUAL REPORT 2018

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Introduction from **the President**

2018 was an exciting year for the BioWin cluster, as it rolled out the Smart Specialisation Strategy. BioWin concentrated its efforts and resources on the six domains of strategic importance for growth in Wallonia: (bio)pharmacy, cell therapy, radiation applied to health, biomanufacturing, medical devices & in vitro diagnostics, and data science. The aim is to promote scientific excellence and to support high impact research and innovation in the region.

Think tanks have been set up in areas such as clinical innovation and foreign investment strategy for Wallonia, which are designed to feed this strategic approach.

At the European level, thanks to a fresh vision for its portfolio and sustained efforts to strengthen its short- and long-term leadership, BioWin has successfully been involved in different projects in the MedTech field. MAGIA brings together Lyonbiopôle, BioPmed, BioWin and Life Science Nord to promote the internationalisation of their PMEs, particularly towards the US and China, which the project has identified as their preferred markets. The S³martMed project provides a strategy to work across top European clusters in the medical technologies field and, in the long-term, will enable PMEs to create strong partnerships. The project's 5 partner clusters are Lyonbiopole, BioWin, BioPmed, GAPR-Medsilesia and Bioregion STERN. With SAFE N MEDTECH, a H2020 EU Framework programme on Nanotechnologies, Advanced Materials, Biotechnology and Advanced manufacturing and Processing, BioWin integrates with a group of more than 30 MedTech partners as a third party via the

Council for European BioRegion (CEBR). BioWin is, itself, taking part in the NEMS4Bio (Nano-Enabled Micro Systems for Bio-Analysis) project led by IMEC (Flanders) and including East Netherlands, Emilia Romagna, Navarra, Tampere and Auvergne Rhône-Alpes. As Chair of the Walloon Region Health Working Group, BioWin has been in the forefront of defining a regional approach towards European programmes such as H2020 and Horizon Europe.

Operationally, BioWin has officially approved five research and development projects, including one collective support project with the MecaTech Cluster. BioWin has also increased support to project leaders by offering a maturity diagnosis to assess the potential of projects for further development and investment.

Internationally, BioWin has ensured a strong Belgian presence at major industry events such as BioEurope Spring and Fall, Bio US, Bio Japan, BioFIT and BioRegate. For some of them, the cluster collaborated closely with flanders.bio.

In terms of attracting, keeping and training talented scientists in Wallonia, the BioWin-supported initiative BioPharE has now come to an end. Going forward, BioWin has initiated discussions with Catch and Essenscia to develop new initiatives for addressing the talent shortage that is now prevalent in the health sector.

During 2018, BioWin introduced the concept of BioWinConnect to strengthen networking activities and promote the sharing of information and expertise amongst its members. The year culminated with

BioWin Day on the theme of "Artificial Intelligence for Health: Between Dream and Reality". More than 500 people took part and no fewer than 200 B2B meetings took place during this event.

BioWin has attracted 22% more members each year since 2015 and registered 29 new members in 2018 a growing proportion of which are from Brussels and Flanders. For example, Janssen Pharmaceutica and IMEC are two flagship organisations in the Flemish region that have demonstrated a strong interest in exploring research opportunities with BioWin members. To cap the year, BioWin set up a co-membership system with the Medicen Paris Region cluster, aimed at consolidating a critical mass of knowledge and talent.

BioWin looks to the future with optimism and enthusiasm. The focus will continue to be on research and innovation, international support to the members and the development of talent.



Philippe Denoel

Chairman of the Board of BioWin and Head of External R&D at GSK Vaccines



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Mission, strategy & approach

Our mission

BioWin's aims are to speed up innovation in order:

- to meet the challenges of tomorrow faced by the public health sector,
- to develop knowledge, job opportunities and the competitive edge of all players in the health sector community in Wallonia.

Our strategy

BioWin is providing support to the academic, clinical and industrial research players to achieve and maintain a world-class level of excellence in health biotechnologies and medical technologies.

Consistent with the European and Walloon **Smart Specialisation Strategy (S3)**, the cluster is focusing its efforts and resources on six domains of strategic importance for the growth of our region.

Wallonia can now be proud of its global technological leadership in the first four strategic domains, and should be able to maintain this position through continued top-tier research, development and innovation.



(Bio)pharmacy



Cell Therapy



Biomanufacturing



Radiation applied to health

The two strategic domains, medical devices and in vitro diagnostics and data science, represent a high potential for the region but have yet to achieve significant development and innovation to reach world class status.

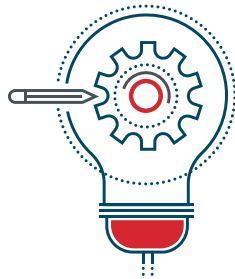


**Medical devices and
in vitro diagnostics**



Data science

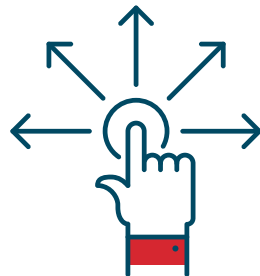
The cluster offers **4 types of activity** to support businesses



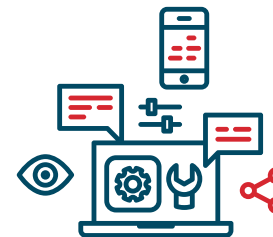
Support for the initiation and development of collaborative R&I projects



International business development



Skills development



Infrastructures and platforms

To achieve the goals of its strategy, BioWin organised **five task forces** to address the themes recommended by the Board of Directors:

Excellence in research



Objectives:

- to coordinate the work of WELBIO and BioWin more strategically to effectively continue their respective activities
- to analyse regional research funding tools: strengths and weaknesses

Clinical innovation



Objectives:

- to find ways to better collaborate between SMEs and hospitals
- to find ways to accelerate the emergence of first-class clinical research projects and help fund them
- to identify opportunities, obstacles and possible tools

Internationalization of SMEs



Objectives:

- to accelerate internationalization of our SME members and address their needs/specificities/markets in our target themes
- to prioritize the range of international services that the cluster can offer its SME members

Company growth



Objectives:

- to facilitate SMEs access to private sources of funding and support their growth
- to create a favorable environment to attract talent and to facilitate the access to qualified workforce

Attracting foreign investment



Objectives:

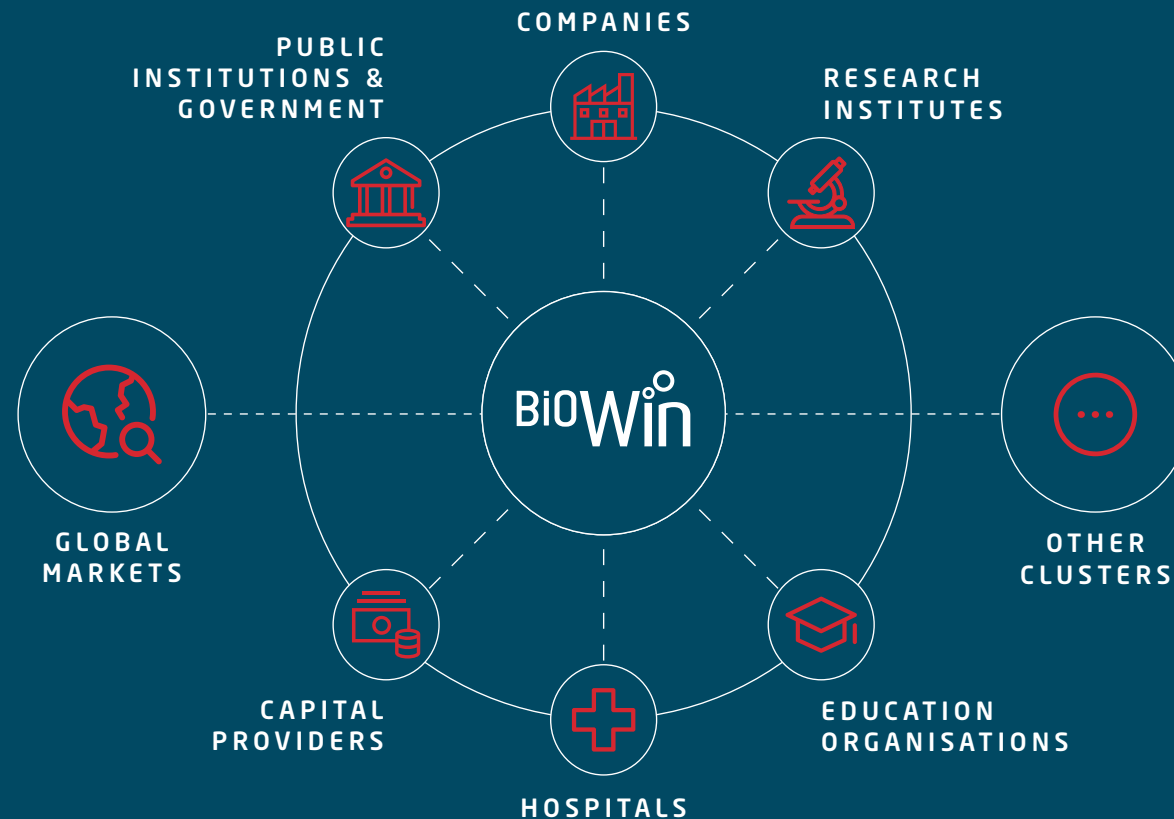
- to find ways to pool the cluster, AWEX and park strategies to consolidate our value chains and fill the gaps
- to determine how to strengthen Wallonia's policy on attracting foreign investors in close collaboration with AWEX Investment

BioWin also plays an important strategic role within the Walloon Region and is often the driving force behind proposals.

In 2018, BioWin advocated for the region by issuing **two strategic notes** addressed to the Minister Pierre-Yves Jeholet. **The first note** proposed an alternative and integrated process for the evaluation of R&I collaborative projects submitted for funding by the Walloon government. **The second note** asked for a better representation of Wallonia in European bodies. In this context, BioWin has taken over the presidency of a health working group, which was essentially created to strengthen Wallonia's position and increase Belgium's presence in these European bodies.

Our **approach**

BioWin helps to strengthen Wallonia's competitiveness and attractiveness by fostering collaborative initiatives between partners driving innovation and growth: large companies, small-medium enterprises (SMEs), start-up firms, service and consulting firms, universities, educational institutions, hospitals, incubators, investment funds, venture capitalists (VCs) and the government.





TREATMENT

MEDICAL

HEALTH

DNA

DOCTOR

4368

RID:9456

RID:7032

RID:2668

HOSPITAL



HS

HN



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Regional health ecosystem

Wallonia, a “biopharma valley”

Wallonia has emerged as a world class biotech and MedTech hub

#1

The pharmaceutical sector is the main industrial activity in Wallonia in terms of added value.

€1,2

billion of private investment into Biopharma R&I in 2017

€1,842

billion of cumulative investment secured by current Walloon BioWin SME members

27%

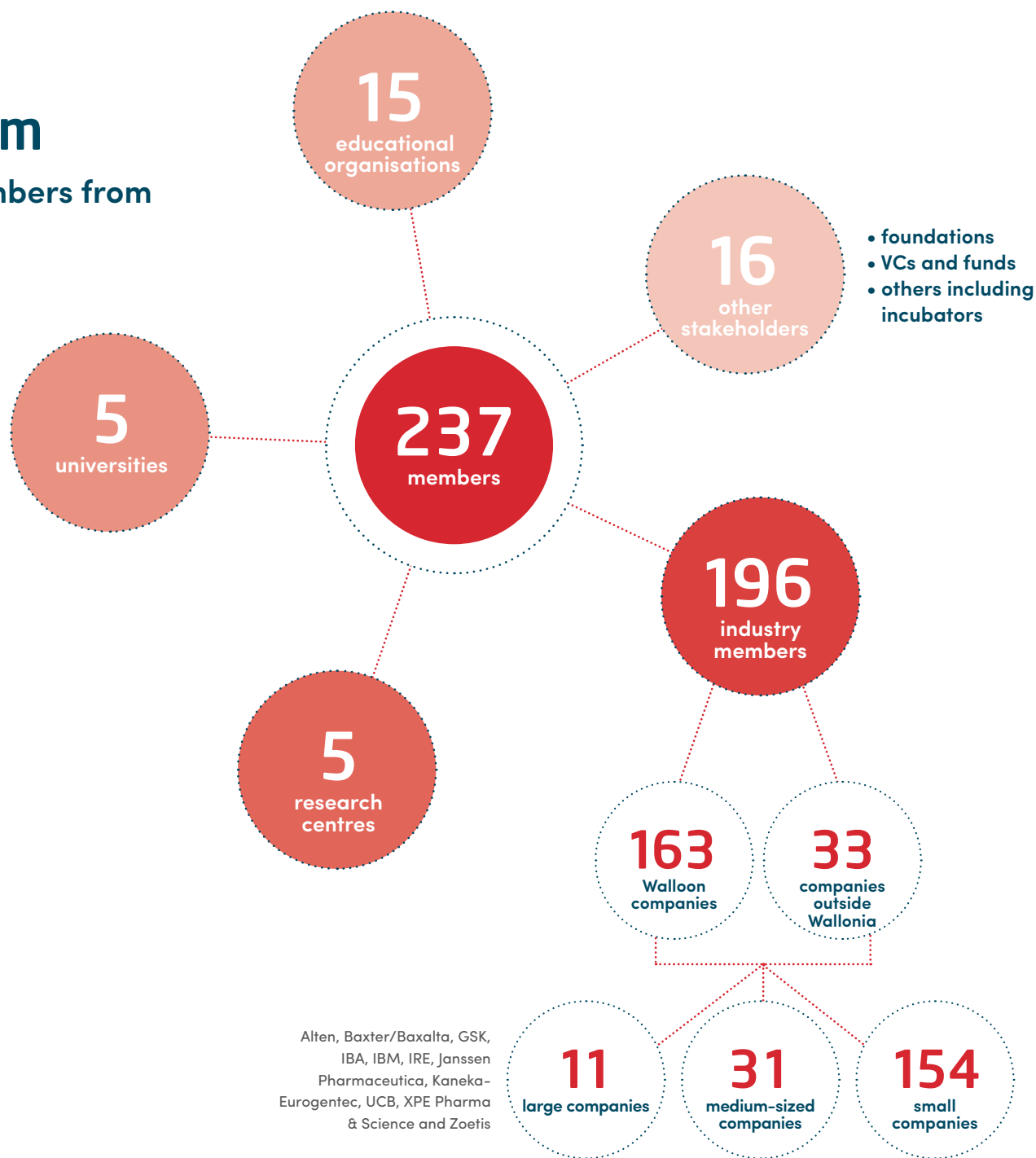
of Walloon exportation

50.000

employees in the Life-Science sector (15.419 direct jobs)

A diverse **ecosytem**

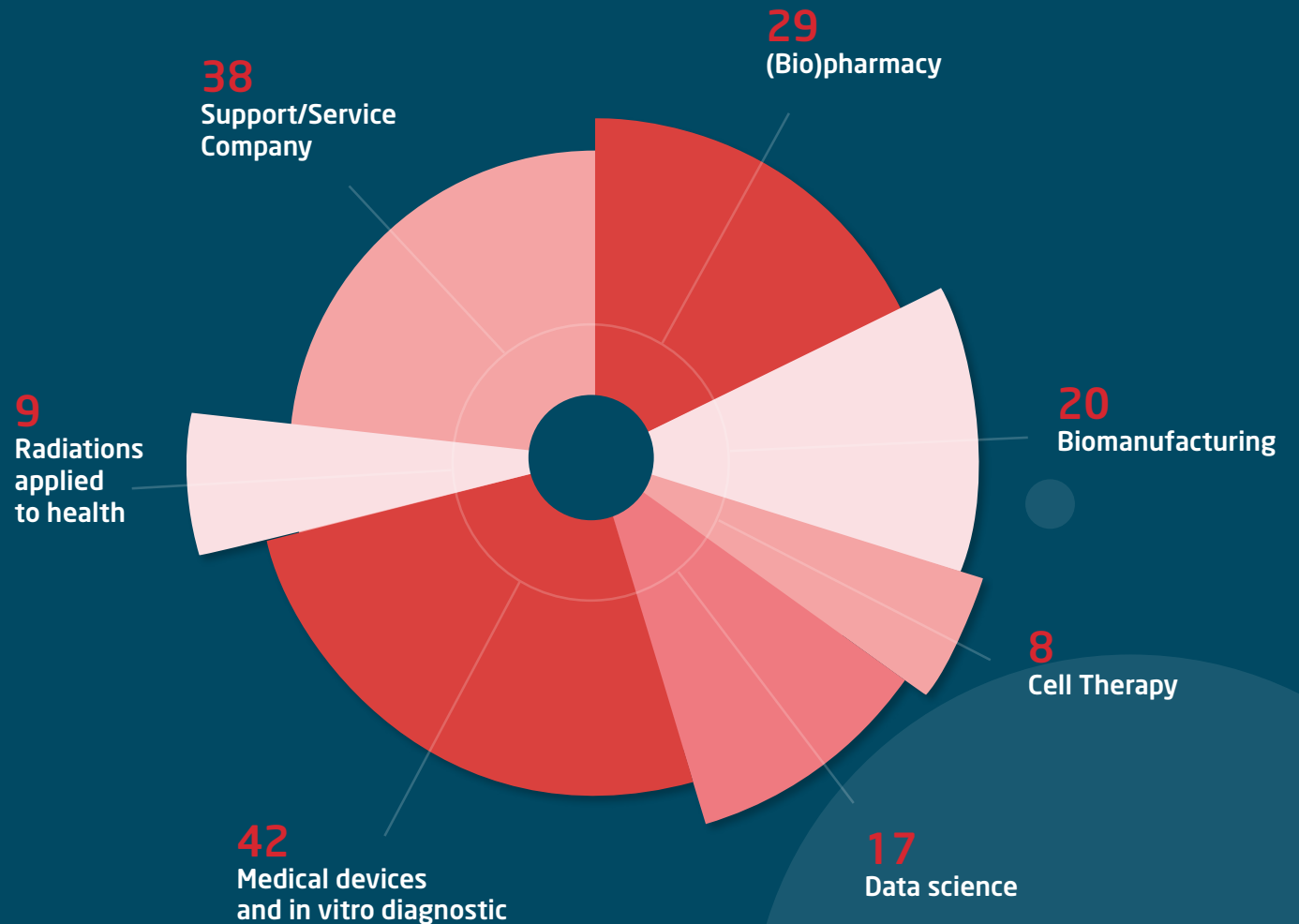
BioWin brings together members from inside and outside Wallonia



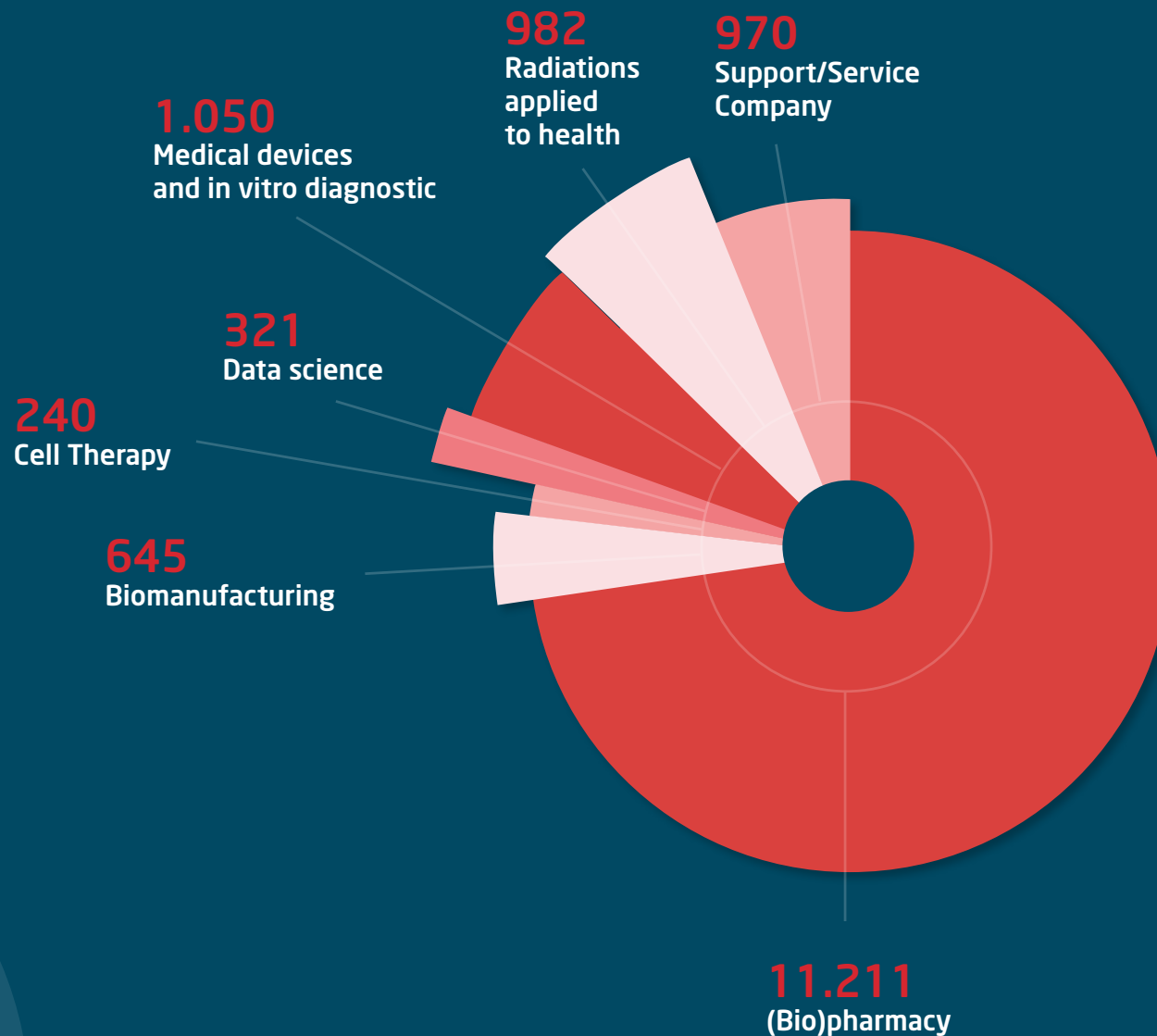
Expertise of our company members

BioWin's company members represent a wide range of expertise encompassing a diverse array of technologies and activities. The industrial ecosystem is supported by specialised service companies (CMO, CROs, biomanufacturing...).

The spread of the 163 BioWin Walloon members by strategic domain and services companies



The breakdown of FTEs among the 163 BioWin Walloon members by strategic domain and services companies

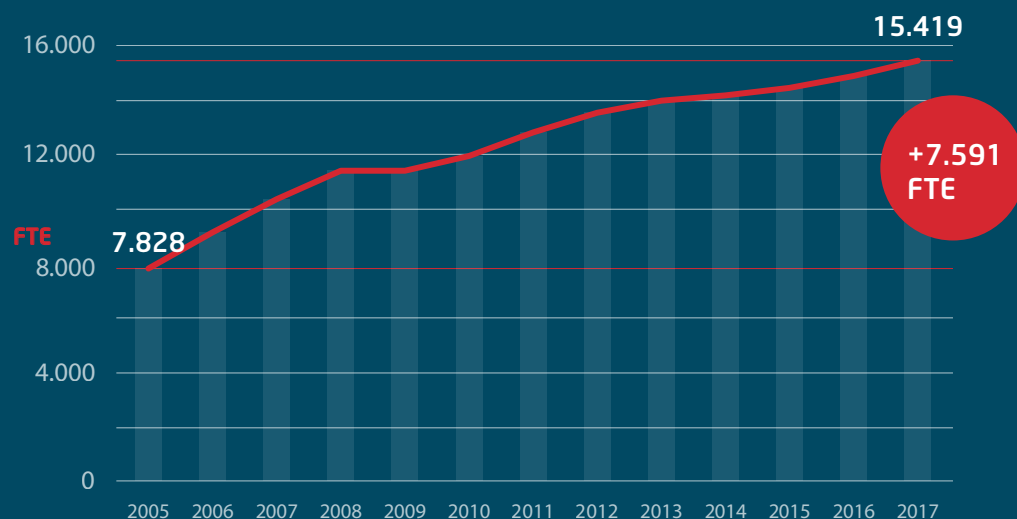


The breakdown of jobs by strategic domain clearly indicates the importance of biopharmacy in Wallonia.

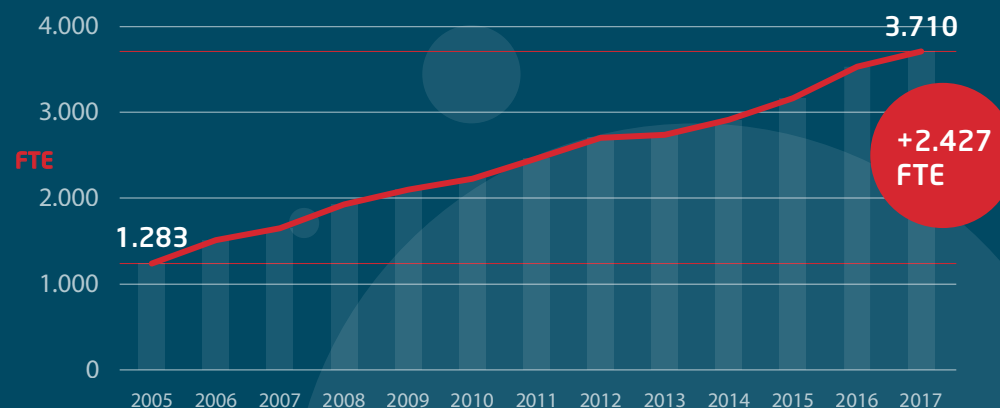
Economic **impact**

Since 2005, the employment rate has grown continuously.
Since the creation of BioWin, the average annual employment growth rate in our Walloon member companies has risen to **7.5%**.

Employment trends for BioWin's Walloon industrial members



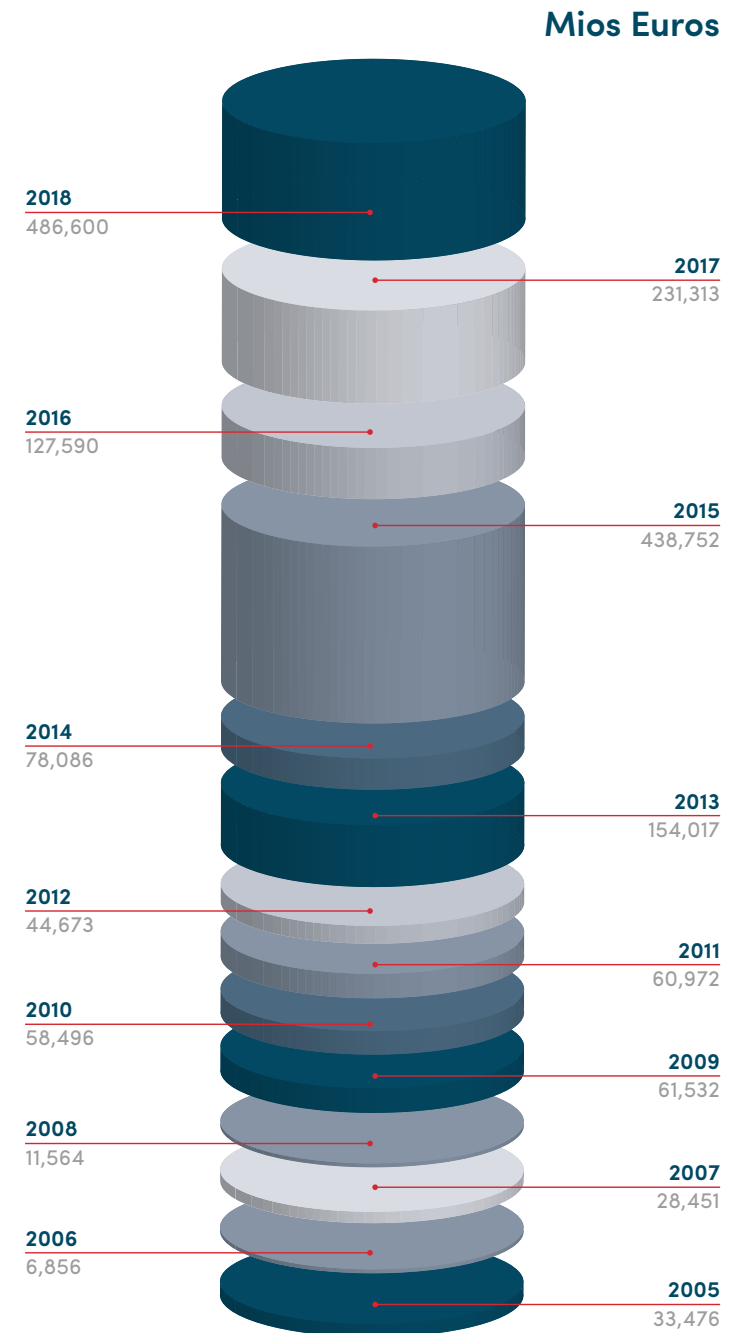
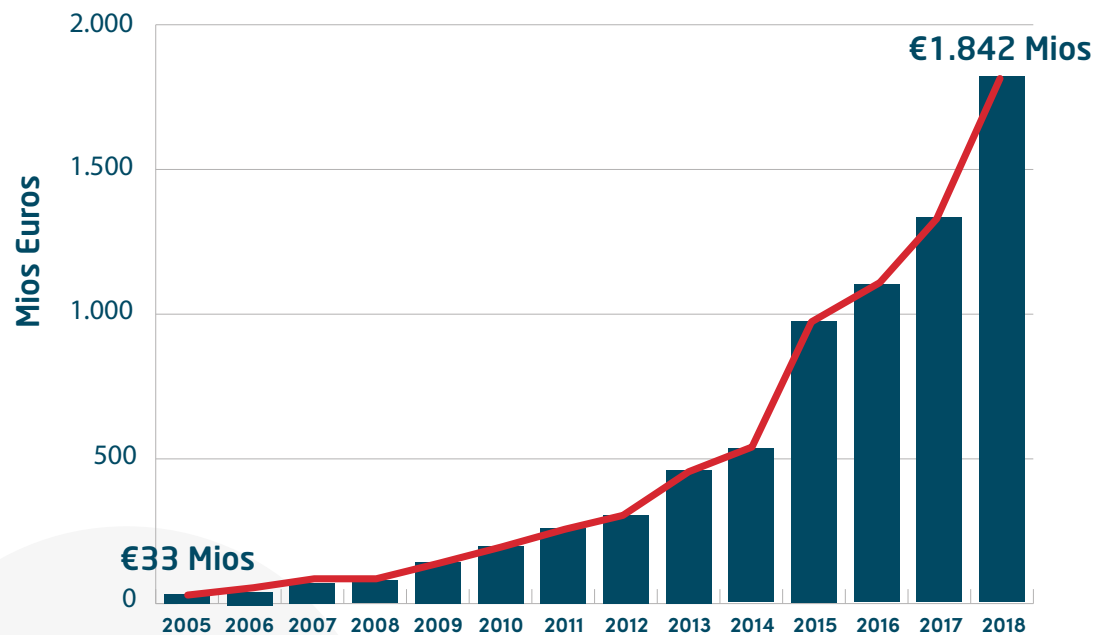
Employment trends for BioWin's Walloon SME members



Accumulated capital raised by BioWin Walloon SME members

The cumulative private investment secured by current BioWin Walloon SME members since 2005 amounted to **€1.842 Mios**. These investments demonstrate the technological excellence of our members.

TOTAL: €1.842 Mios







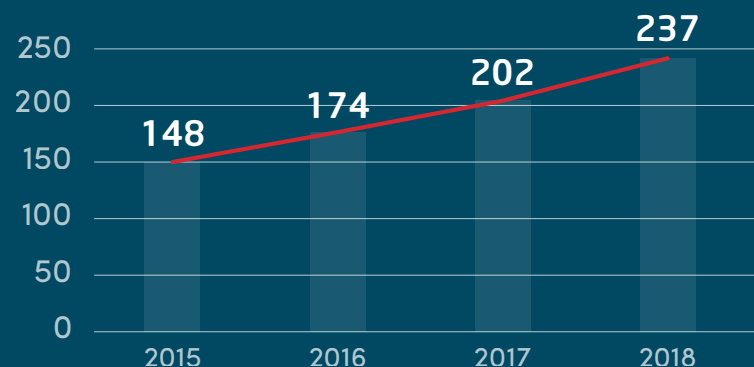
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Membership

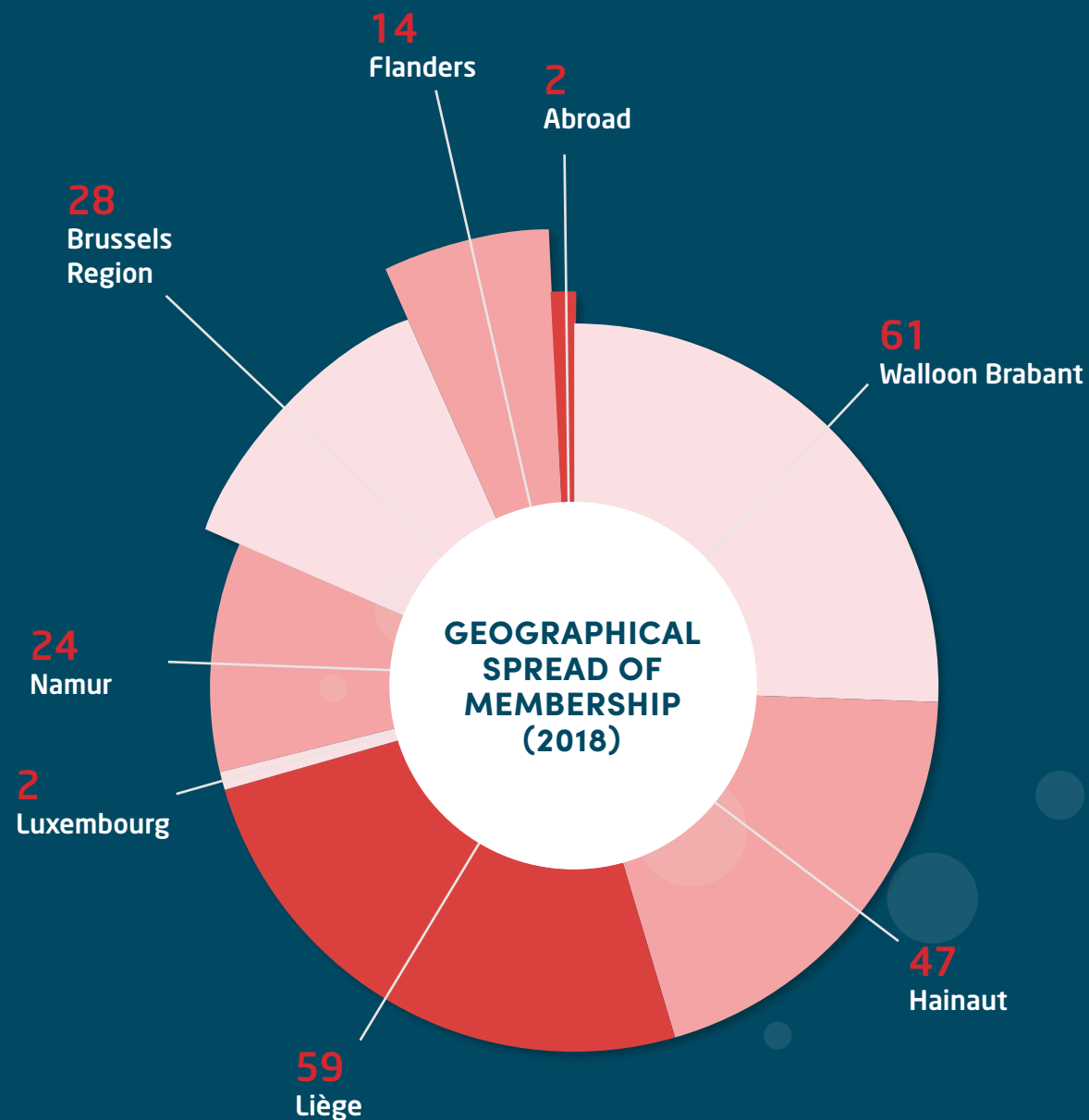
Membership trends

BioWin currently has **237 member entities**.

The number of cluster memberships has been growing steadily since 2015:



Since 2015, the annual growth equals **22%**.



Increasing attractiveness of the Walloon health ecosystem for non-Walloon members

Joint membership

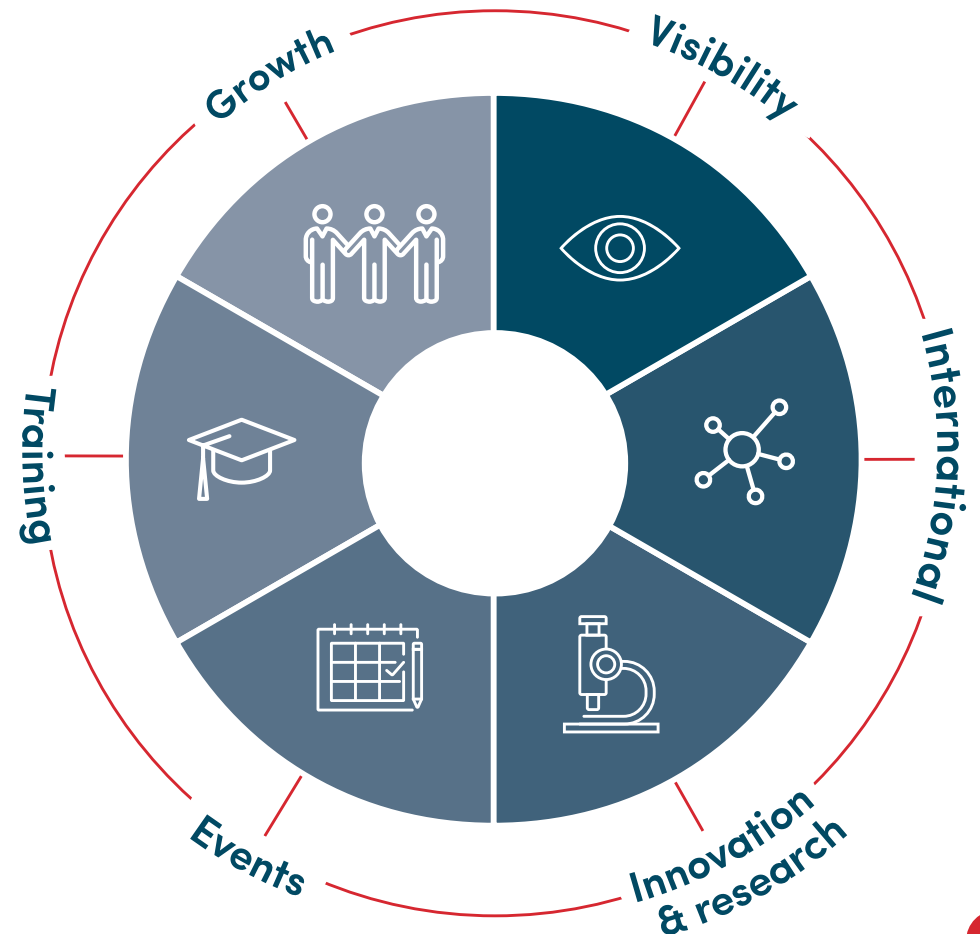
with other clusters

At the end of 2018, BioWin initiated a **joint membership** system with the **Paris Region Medicen cluster**. This system expands collaboration opportunities for members of both clusters and helps strengthen the health-care ecosystem.

Broad range of **services**

In 2018, BioWin broadened and defined its range of services. Members were offered a broad range of services in our catalogue dedicated to different categories of members.

- Support for all aspects of R&I projects (national or EU level)
- Accelerate international development
- Attracting investors to sustain company growth
- Organise theme-based events
- Develop trainings and advertize jobs
- Insure national and international visibility of our members' key messages





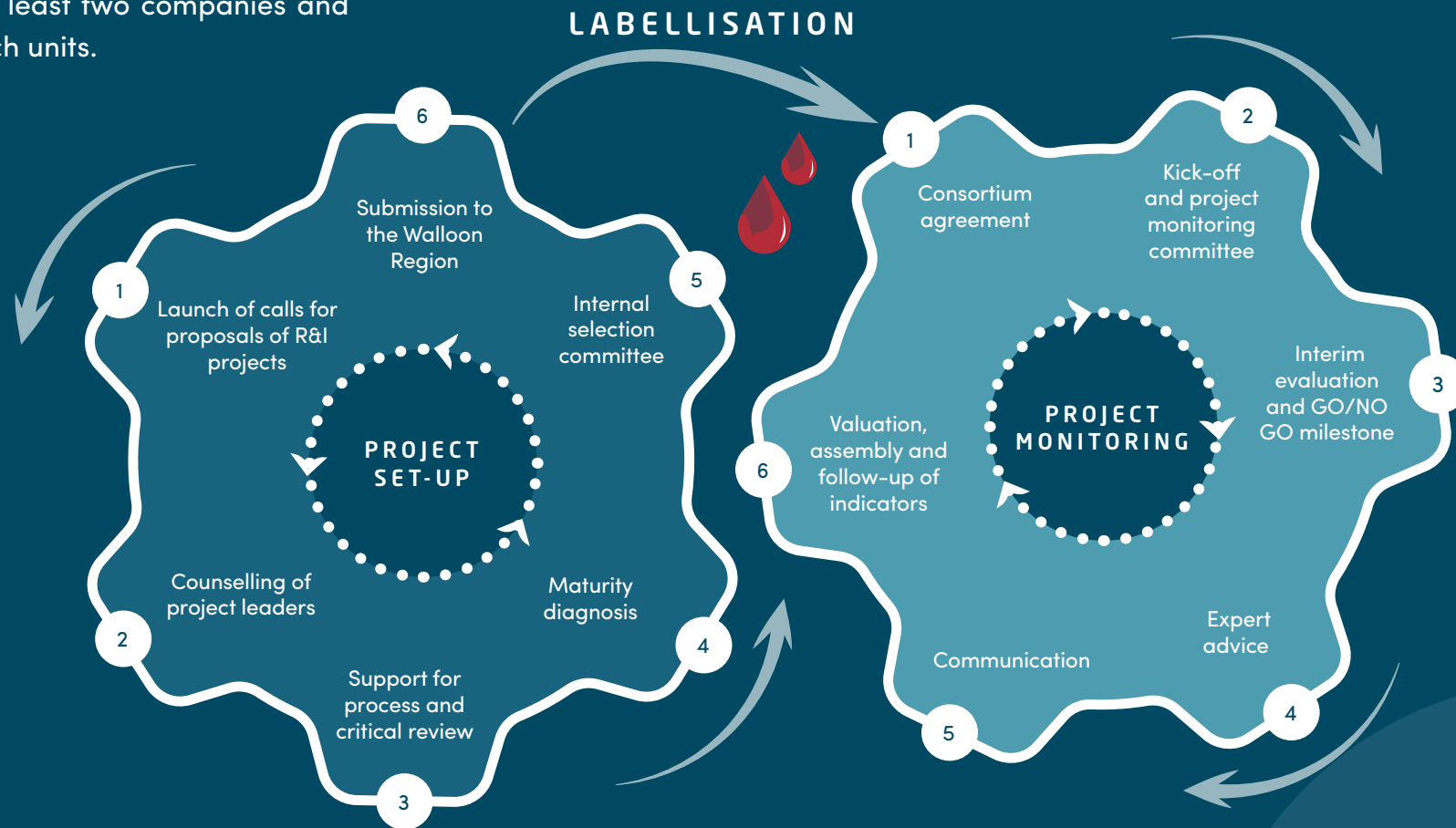


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Core activities

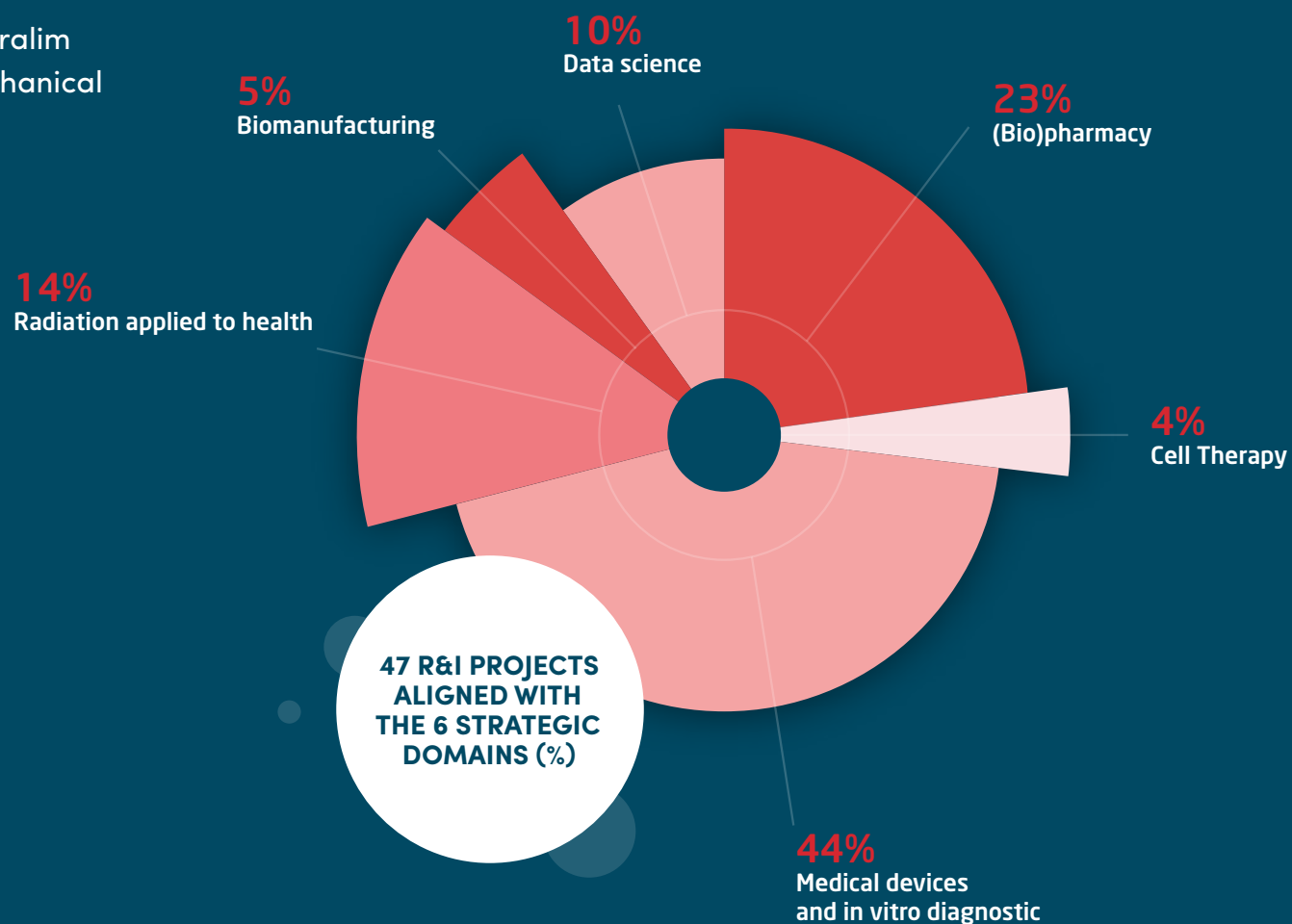
Regional R&I

The innovation strategy is based on the dynamism of BioWin members and a robust process for the set-up and follow-up of innovative and collaborative projects bringing together at least two companies and two research units.



Key figures for the portfolio of R&I projects include:

- **47** R&I projects for a total budget **€144** million:
 - **271** partners including companies, research centres and universities
 - Public funding: **€113** million
- **3** R&I projects in collaboration with Wagralim (agro-food cluster) and MecaTech (mechanical engineering cluster)



Key achievements 2018

Activities	Indicators
Calls for proposals	3
Review of project proposals	14
Project set-up	7
Submission of projects to the Region	6
Official approval of projects (labellisation)	5
Interim Evaluation – Go / No Go milestone	3

- **5** projects have been granted: **IonCath** (call 18), **eLisa** (call 22), **CQIntégré** and **BENEFIT** (call 23) for a total budget of **€11,3** million, including **€7,8** million subsidies. **ArcPT** was developed by MecaTech collectively with BioWin.
- The R&I team is monitoring **17 ongoing projects**, **3** of which have passed the interim evaluation.
- Submission of a **strategic note** to the Government proposing an alternative and integrated process for the evaluation of the R&I collaborative candidate projects.

Key indicators

124 
patent applications

64 
developed products

31 
developped services

249 
publications

International **development**

European interclustering projects

BioWin's strong network of European partners enables its participation in interclustering projects that fit with BioWin's S3 target areas. For all of these projects, a particular emphasis is placed on providing support to SMEs.

COSME multi-cluster projects



- **MAGIA** is a European MedTech alliance to support the internationalization of SMEs. This initiative gathers **4** centres of excellence – Lyonbiopole (France), BioPmed (Italy), BioWin and Life Science Nord (Germany). Its main goals are to facilitate the internationalization of their SMEs through cooperation and resource sharing and give greater visibility to the European medical technology industry.



- **S³martMed** was launched in November 2018. This project is an opportunity for BioWin to develop a joint cluster partnership strategy with several European clusters thriving in medical technologies. **5** regions are working on this project: Lyonbiopole (France), BioWin, BioPmed (Italy), MedSilesia (Poland) et BioRegioStern (Germany).

Key achievements 2018

- In 2018, BioWin participated in different events organised by the European Commission to position the Walloon health sector, our S3 Strategy and the BioWin cluster at the European level.
- In addition, BioWin has joined forces with Europe's leading centres on two major projects **MAGIA** and **S³martMed** to support partnerships in the healthcare sector across Europe.
- With **SAFE N MEDTECH**, a H2020 EU Framework programme on Nanotechnologies, Advanced Materials, Biotechnology and Advanced manufacturing and Processing, BioWin integrates with a group of more than 30 MedTech partners as a third party via the Council for European BioRegion (CEBR).
- As Chair of the Walloon Region Health Working Group, BioWin has been in the forefront of defining a regional approach towards European programmes such as H2020 and Horizon Europe.

Helping our members to build their network and meet potential partners

BioWin is in contact with the world's most innovative bioregions to help its members to connect with the best possible partners. We offer global networking events by making extensive use of our networks and partners (hubs, clusters, bioregions, science and technology parks). By working closely with AWEX (Wallonia Foreign Trade and Investment Agency) and WBI (Wallonia Brussels International), we accompany delegations at international Biotech-MedTech trade fairs (BioWin/AWEX programme) and we contribute to the attraction of foreign investors.

We also organise first-class matchmaking events to help members in their international development with different objectives (R&I, strategic or business partnerships), always focused on specific topics based on our Smart Specialisation Strategy.

Our international strategy targets the following geographic areas: Europe, USA, Canada, Asia Pacific and Israel.

Key achievements 2018

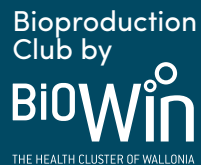


Our councils and networks

Together with different not-for-profit national and international entities, BioWin has joined several networks based on its strategic domains. Networking is key to giving visibility to the health sector in Wallonia and to identifying opportunities for further activities with our international partners. BioWin is active in the following networks:



The Council of European Bioregions (CEBR) gathers around 40 health clusters in Europe, contributing to developing the competitiveness of the European biotech sector through networking activities, collaborations, recommendations and exchanges of good practice between these regional bio-communities.



Bioproduction Club is a regional network created by BioWin in 2017 to bring together members active in biomanufacturing.



The Belgian Network for Radiation Applications in Healthcare (Rad4Med.be) gathers more than 60 members active in this field with the aim to support the worldwide development of a sector in which Belgium is a world leader.



The European Diagnostic Clusters Alliance (EDCA) is an international alliance of eight clusters with the aim of promoting and developing collaboration between European diagnostic clusters to consolidate the competitiveness of their SMEs.



Wal-Dx is a regional network created by BioWin in 2009 to facilitate discussion and exchange of best practice within the 20 members (mainly companies) active in diagnostics in Wallonia.

Skills development

BioWin has developed a one-stop shopping platform that includes continuous training programmes in Wallonia for the health sector. This platform is part of the BioPharE project and is a catalogue bringing together training offers from various Walloon providers.

Also, with its skill-development services, BioWin aims to:

- Contribute to the monitoring of the pharmaceutical sector to anticipate the shortage of critical skills in the employment market for the benefit of universities, higher education schools, as well as research and technology institutes
- Support the economic development of the health sector by increasing the employability of workers
- Ensure the visibility of good quality training programmes across the S3 target areas
- Encourage the collaboration between industry and universities to enhance the employability of students

Key achievements 2018

- **4** training projects active in 2018: **BioPharE, STIP, Technimed & 4cells.**
- **40,000** hours of training given within the BioPharE project.

In 2018, BioWin has completed the roll out of BioPharE programme launched in 2011. BioPharE has been designed to be THE project for developing critical skills for cross-sectional integration and strategic and operational excellence in the value chain of health biotech companies.

The BioPharE project helped decompartmentalize training in our sector and expand the range of training courses available and have them accessible from a single site (one-stop shop).

BioWin has also opened discussions with Catch (Catalysts for Charleroi) and Essenscia (Belgian Federation for Chemistry and Life Sciences Industries) to explore solutions to deal with the current labour shortage in our sector.

Technology **platforms**

BioWin contributes to the creation of technology platforms. The development of such platforms are major projects which have an acceleration effect on the entire sector.

Key achievements 2018

- **Biobanks platform project** was completed at the end of 2018. A working group involving the Wallonia-Brussels Biobank (BWB) played a key part in helping to instigate the Royal Decree on biobanks by publishing a compendium for users in August 2018. BioWin participated in a multi-stakeholder dialog led by the King Baudouin Foundation, the objective of which was to identify the research priorities on biobanks and liver diseases. The conclusions for Priority Setting on Biobanks and Liver Diseases are now available.
- **Prother-Wall** (proton therapy platform) is on track. The company ProtonW.be is to be created and the Prother-Wall project is expected to be launched in early 2019.
- **MedTech Wallonia project.** At the end of 2017, BioWin, MecaTech and WSL set up a one-stop shop for MedTech operators in Wallonia. The following joint efforts were undertaken in 2018:
 - Speaker at the MedTech Meetup (Brussels)
 - Organisation of 2 regulatory affairs workshops
 - Mapping active industrial MedTech operators
 - Creating the MedTech Wallonia website

Communication and events

BioWin is extremely proactive in promoting the technological strengths of Wallonia in the healthcare sector. The cluster places particular emphasis on highlighting the Walloon expertise, skills and potential of academic and industrial organisations.

The BioWin cluster has organised different networking events.

BioWinConnect

In 2018, the cluster created the new BioWinConnect concept to improve networking and experience sharing. These events bring members together and give them the opportunity to share their expertise and attend presentations, debates and training on specific topics like **ethics, communication, biomanufacturing, finances...** followed by discussions and networking sessions. BioWinConnect events foster new research and business partnerships among members. They are also a unique opportunity to share industry information. Five BioWinConnect events were organised in 2018.

National initiatives

In 2018, several joint initiatives were taken with **flanders.bio**, particularly at major international fairs including BioUS and BioJapan.

Networking events for large companies, SMEs and Belgian universities

The foothold and reach of large groups are key to regional economic growth. In 2018, GSK, together with BioWin, flanders.bio and Flanders Vaccines organised the “**GSK meets Belgian Universities**” event. The aim was to create opportunities for Belgian academics and GSK scientists to share skills. Following last year’s success, the event was repeated in 2019.

BioWin Day 2018

In December, BioWin organised its BioWin Day on the theme “**Artificial Intelligence for health: between dream and reality**”. Over **500** people attended the event, which had **23** speakers and moderators. **200** B2B meetings took place and **44** companies were present in the exhibition hall. Its varied programme, high attendance and the interactions during networking made this 7th edition a resounding success. In choosing to focus attention on this particular theme, BioWin’s goals were to:

- show members and politicians how valuable these technologies will become for the entire health sector (from research to health care)
- stress the need to rapidly invest in research programmes in this field

Communication tools



Website



Emailing



Social media



Press relations
& media campaign



Theme-based events and
international trade fairs



Theme-based flyers



Blog

Key achievements 2018

Website

Launch of the new
website in **May 2018**



Emailing & social media

1.482 
subscribers to our newsletter

3.279 
followers on LinkedIn

1.715 
followers on Twitter

Press relations & media campaign


2 
press releases

7 
articles in the
Belgian press

9 
European
publications

2 
campaigns (in La Libre
and Trends Tendances)

Events

8 
events with
over **750** attendees
(organised by BioWin)

14 
international trade fairs with more
than **180** Walloon companies participating
(attended by BioWin)





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Governance, team and new members

Governance

BioWin was established in 2006 as a non-for-profit organisation.
Philippe Denoël has been the president of the Board of Directors from January, 2018.

President

P. Denoel
GSK

Vice-Presidents

SME

T. Jonckheere
IMMUNXPERS

D. Demonte
(until Q3 2018)
O. Leo (from Q4 2018)
ULB

University

Board members

Large
companies

I. Dheur
EUROGENTEC SA

C. Dumont
ZOETIS

D. Malherbe
UCB SA

J-M. Geets
IBA SA

SMEs

F. Blondel
KITOZYME SA

D. Bedoret
MASTHERCELL

M. Detheux
(until Q3 2018)
ITEOS THERAPEUTICS

T. Helleputte
DNALYTICS

Universities

J-L. Balligand
UCLouvain

M. Georges
ULIÈGE

M. Raes
UNAMUR

L. Ris
UMONS

Research
centre

B. Moinet
CER GROUPE

BioWin team



Sylvie Ponchaut	Managing Director
Delphine Ramelot	Executive Assistant
Marianne Ghyoot	Advice and support for the development of innovative, collaborative and regional R&I projects
Thierry Ferain	Advice and support for the development of innovative, collaborative and regional R&I projects
Damien Diop	Membership Development
Carolina Heredia	Administrative assistant of the training programme
Laurence Timmermans (until Q2 2018)	International development of technological partnerships for the cluster and its members
Monique Marrec-Fairley	Support for the development of innovative European projects
Amélie Moyaerts	Communications, visibility & sponsoring
Marine Di Vincenzo	Digital communications, CRM & knowledge Management
Rose-May Delrue (until Q1 2018)	Training Programme Director
Marc Dechamps (from Q4 2018)	Director of International Affairs

New membership 2018

In 2018, **29 new members** joined the cluster:

- 2Bridge
- Agilos
- BCI Pharma
- Beckmann Bio
- Brussels Medical Device Centre
- Burdinola Benelux
- CBC Banque
- ChromaCure
- Consultys
- CONVERT Pharmaceuticals
- Covartim
- Cytomine
- Digital Orthopaedics
- Eureka
- Genalyse Partner
- Gespodo
- Global project Management
- HeX Group
- IQVIA
- Materia Nova
- Janssen Pharmaceutica
- JOBS@SKILLS
- Knoware
- KOAN Law Firm
- Medidee
- Quality By Design
- SalamanderU
- StartupStudio.be
- Syndesi Therapeutics

Partners





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