# ANNUAL REPORT

# BIOWiN

THE HEALTH CLUSTER OF WALLONIA

2020

www.biowin.org

### Introduction



2020 has been a special year in many ways, given the pandemic context. The ecosystem has shown remarkable responsiveness, agility and creativity in responding to the crisis. **BioWin played a structuring role by creating a collaborative platform concentrating offers and requests for partnerships.** During this pandemic, the key role played by Wallonia and Belgium in vaccine production was further highlighted and reinforced.

In 2020, BioWin renewed the Board of Directors. The Board endorsed a new strategy for the period 2020-2023. The Cluster will concentrate its efforts on 2 strategic projects. The first involves strengthening the industrial production sector of biomedicines (biomanufacturing). The second, together with other entities at regional and national level, aims to accelerate the decompartmentalization of the hospital and business worlds and make Wallonia a champion in health innovation.

This year, R&I activities were intense: the Cluster analyzed 19 letters of intent for R&I projects, accompanied 6 dossiers to the Internal Selection Committee and presented 5 of them to the Region. During 2020, five projects were labeled with budgets amounting to € 19.6 million, including € 13 million in subsidies.

Since 2019, thanks to the strengthening of the team, the Cluster has been helping members identify the private or public funding necessary for the development of products and the growth of the companies that develop them. Despite, or perhaps because of, the COVID-19 pandemic, our ecosystem was thriving in 2020. It was a record year of fundraising for BioWin's members, with our SMEs raising no less than € 763.2 million from investment funds and VCs.

#### BioWin has completed a large-scale project aimed to

- 1 | Qualify and quantify the sector's talent needs and
- 2 | Make proposals to the Government to alleviate the talent shortage. Access to a qualified and available workforce is indeed a challenge for all BioRegions of excellence in the world. Eight recommendations have been made, and implementation of some is expected to start in 2021.

Internationally, BioWin has participated in around **ten virtual missions**, with the aim of **strengthening the visibility of the sector and the Region**. The Cluster was also approached by AWEX investment to support files for the potential **establishment of foreign companies** in the Region.

The Cluster is involved in 3 European projects (MAGIA2Market and S3martMed and CE4Big) and chairs the Council of European Bioregions. BioWin is also an associate partner of the European initiative EIT Health.

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MISSION, VISION, APPROACH & STRATEGY



#### **OUR MISSION**

The BioWin competitiveness cluster brings together all the innovation system players in the field of health (biopharma and medtech) in Wallonia, with the goal of stimulating regional economic redeployment.

Accelerate innovation to:

1 | meet tomorrow's public health challenges and 2 | develop the knowledge, employment and competitiveness of all players in the health sector ecosystem in Wallonia.



#### **OUR VISION**

By 2025, Wallonia will be recognized internationally for its world-class academic, clinical and industrial research environment in the field of Life Sciences.

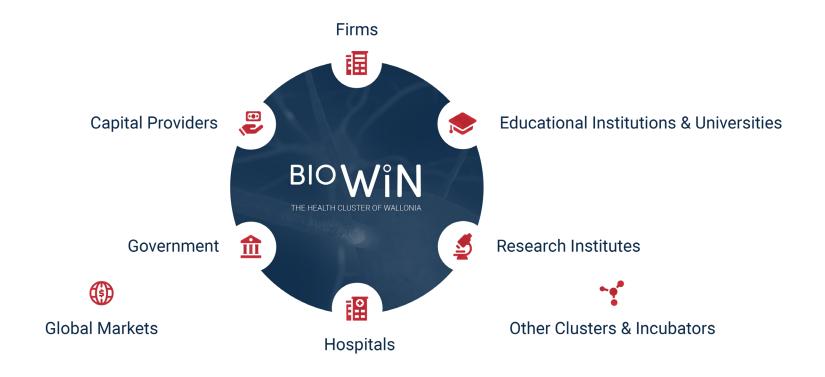
The competitiveness of the Walloon biopharmaceutical industry will be strengthened, and our Region will have become one of the world's largest hubs in research, development and industrial production of vaccines and biologics.

An efficient and competitive healthcare innovation ecosystem will have been created by unifying the hospital and business worlds.

# Our approach



BioWin contributes to strengthening Wallonia's competitiveness and attractiveness by promoting collaborative initiatives between all the major players in biopharma, medtech and digital health sectors.



### Our strategy



#### 4 activities



R&I project support



Skills development



International business development



Growth and financial support

#### 4 strategic areas



#### (Bio)pharmacy (including cell and gene therapy and industrial production of biologics)

The development and industrial production of therapeutic and prophylactic agents, including vaccines and cell and gene therapies, in different treatment areas. Includes related services, e.g. drug discovery, preclinical activities, clinical trials, etc.



#### Medical devices and in vitro diagnostics

The development of devices, equipment, apparatus, digital components and reagents to provide: (1) An alternative to medication for monitoring, relieving or treating a condition. (2) An in vitro test to provide information about the pathophysiological condition of a patient.



#### Radiation applied to health

The use of ionizing radiation to diagnose and treat diseases. This area includes the development of proton therapy, isotope production equipment, biomarkers and decision support tools for imaging.



#### **Digital health**

The multidisciplinary use of massive data and artificial intelligence to serve 4P (predictive, preventive, personalized and participatory) medicine.

In the next 3 years, the cluster intends to address 2 strategic projects: • **BioManufacturing project:** Accelerate the development of the Walloon biomanufacturing industry

Create a global hub for vaccine and biologics production.

**Health Innovation project:** Make Wallonia a champion in the field of health innovation

Unite the hospital and corporate worlds to capitalize on recent rapid healthcare developments.





# Wallonia, a "biopharma valley"





#1

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



€1,2 B
of private investment
into Biopharma
R&I in 2018.



€ 2,945 B
Cumulated private
capital raised by SMEs
(2005-2020).



**35%** of total Walloon exports.



50.000 + employees in the life-science sector (16.424 direct jobs).

# A diverse ecosystem





238 **MEMBERS INCLUDING** 



187

**INDUSTRIAL MEMBERS** 



圃

155

WALLOON **COMPANIES** 





10

GLOBAL **LEADERS** 















5

**UNIVERSITIES** (including 400 research units)



6

PRIVATE RESEARCH **CENTERS** 



11.000

RESEARCHERS



20.000

**HOSPITALS BEDS** 



45

SERVICE **PROVIDERS** 



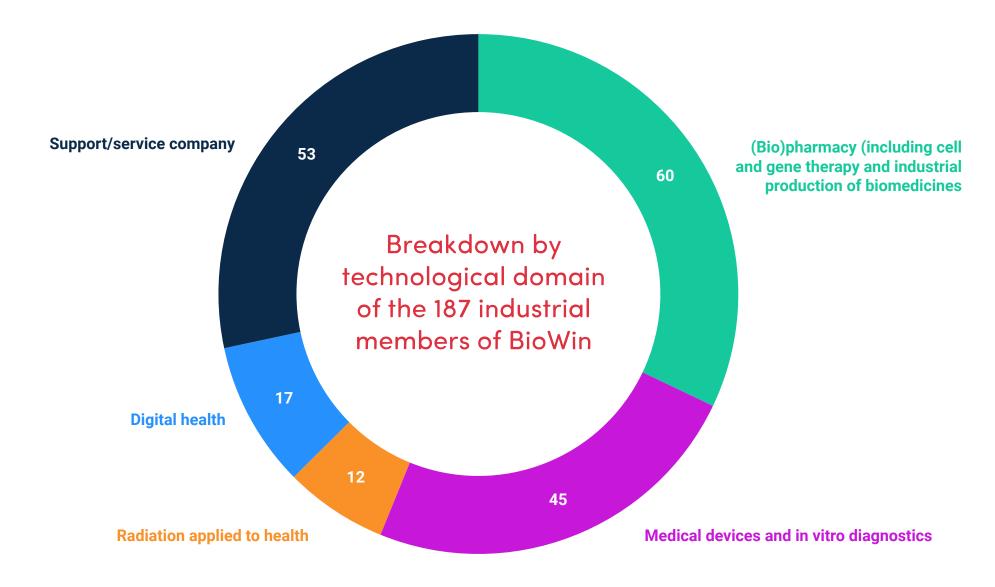






# Expertise of our company members





# Economic impact

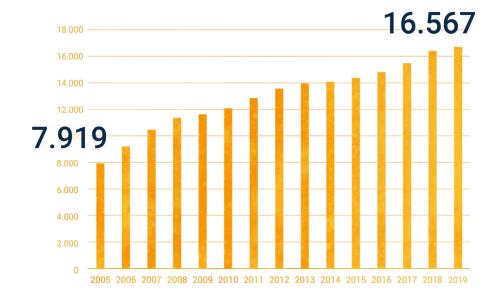


**Evolution of employment in BioWin's 155 industrial members in Wallonia.** 



Since the creation of BioWin, the average annual employment growth rate has increased continuously.

In our Walloon member companies, it has risen by **7,3%** in 2020.



8.648 FTE

+7,3%

employment growth in 2020

# Economic impact

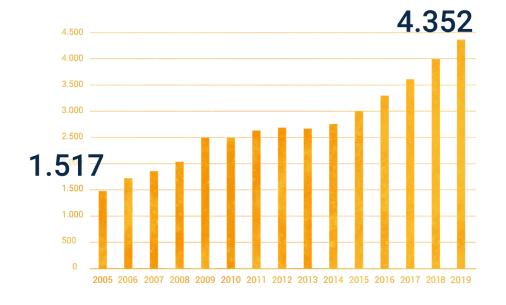


**Evolution of employment in BioWin's 177 SME members in Wallonia (including small companies).** 



Since the creation of BioWin, the average annual employment growth rate has increased continuously.

In our Walloon member companies, it has risen by **12,5%** in 2020.



3.246 FTE job creation (2005-2019)

+12,5%

employment growth in 2020

# Economic impact



Evolution of added value for BioWin's 155 industrial members in Wallonia.



In 2019, the added value of the members of the Cluster located in Wallonia was  $\in$  7,751 B (compared to  $\in$  1,42 B in 2005).



€ 6.331 M added value (2005-2019)

# Private fundraising



Since the Cluster began, SMEs have raised nearly 3 billion Euros from investment funds, which is truly exceptional and testifies to the quality and excellence of the research carried out in our member entities.





# BIOWiN



### Coronavirus





The coronavirus disease 2019 (COVID-19) pandemic is undoubtedly the greatest hallenge global health systems have faced in 2020.

Like other European countries, Belgium was strongly impacted and the surge in infections in the spring prompted the government to enforce a historical nationwide lockdown on the 18th of March.

Faced with this unprecedented health crisis, governing entities and members of the Walloon Health and Life Sciences ecosystem showed a remarkable reactivity, agility and creativity in their response to the pandemic. Universities and companies, both large and small, mobilized and offered creative solutions to the numerous challenges arising from the crisis through numerous national and international collaborations and initiatives.

Playing an important role in structuring the ecosystem since its creation in 2005, BioWin contributed by rapidly activating Walloon resources, identifying the expertise and talents needed for new projects, and facilitating collaborations between the different actors.

While the significant knowledge gaps about the pathogenesis of COVID-19 and the ever changing epidemiological and social parameters of the crisis have proven to be undeniable challenges, the various actors underlying the Walloon response have risen to the task and, collectively, provided invaluable support towards controlling the repercussions of the pandemic in our country.

### **Achievements**



#### Development of an online collaborative platform to capture offers and requests during and after the COVID-19 crisis.

More than 200 participants from 25 different countries actively took part in this networking action under the supervision of BioWin's operational team.

The implementation of this platform completed the networking offer from the MecaTech cluster and the WeLL (Wallonia e-Health Living Lab) in the same spirit of facilitation.

#### PERSONAL PROTECTIVE EQUIPMENT (PPE) AND MATERIALS

#### **Mask production**

 Selected by the government to ensure the large-scale manufacturing of surgical masks



3D printing of swabs





#### Mask decontamination

Decontamination through the combination of a proprietary confinement chamber and decontamination device





- Coordination LIÈGE
  - UV decontamination method
  - Ethylene oxide decontamination method



#### **TESTING**

#### **Testing methods**

SANA (SARS-CoV-2 Namur) project:
 Development of a high quality diagnostic test



· Development of an automated testing method



Development of the rapid viral antigen detection method



#### Serological testing

Collaboration with a Zheda (China)
 Development of a rapid IgG/IgM detection test



#### **Platforms**

- Diagnostic platforms
  - Universities of the Wallonie-Bruxelles federation





LIÈGE









- "Bis" Testing platform
  - · Back-up diagnostic centres in case if increase in SARS-CoV-2 cases











UNIVERSITE DE NAMUR









Provided reagents and equipment to the diagnostic laboratories





### **Achievements**



#### **TREATMENT**

#### **Vaccines**

Collaboration with Sanofi



Colaboration with Reithera (Italy) and Leukocare (Germany)



Collaboration with Astra-Zeneca



#### Other treatments

Development of anti-viral treatmen



- Communication about platform developments to members (at least 1 communication every 4 weeks during the containment phase).
- Communication about the European opportunities in terms of funding and collaboration to members (at least 1 communication updated every 6 weeks during the acute phase of the crisis).
- Setting up at least one regional or international collaborative project linked to the COVID-19 crisis.





# BIOWiN







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



#### 58 projects

(34 completed / 24 ongoing)
for a total budget of
€ 168 M including
€ 131 M subsidies



#### 5 co-labelled

1 with Wagralim 4 with MecaTech



### 5 new projects labelled in 2020

NeuroInsights, BoneRec, FAR, M2-Targets, and EPT-1 (co-labelled with MecaTech)



### € 19,6 M total budget

including € 13 M subsidies



116 patent applications



71 developed products

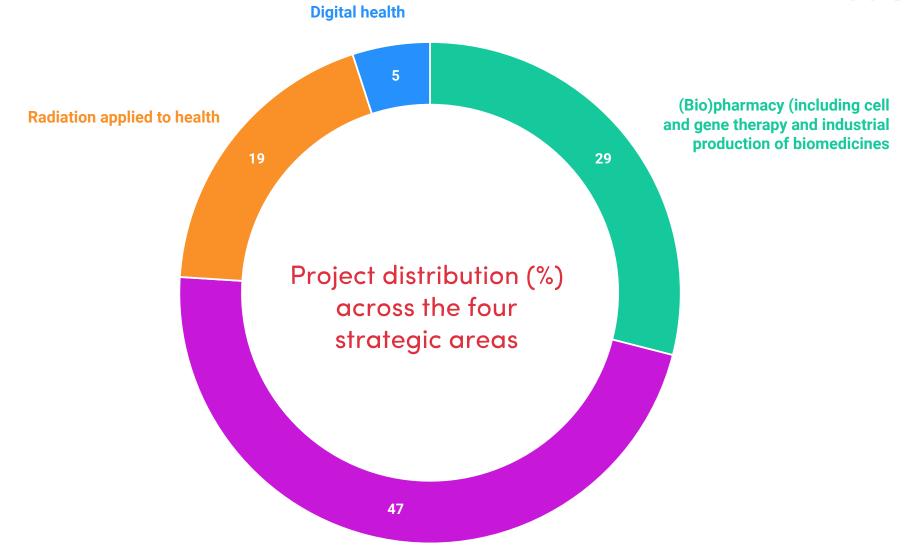


# 36 developed services

including companies, research centres & universities







Medical devices and in vitro diagnostics

### Achievements



In 2020, the R&I Unit opened 3 calls for projects (calls 30, 31 and 32). In total, including the projects co-labeled with other clusters, the unit analyzed 19 R&I project intentions, accompanied 6 files to the Internal Selection Committee and presented 5 files to the Region.

Activities	Indicators
Project calls	3
Project intention analyses	19 (16+1*+2**)
Projects accompanied to the Internal Selection Committee	6 (4+2**)
Project submissions to the Region	5 (4+1**)
Project labeling	5 (4+1**)
Project kickoffs	4
Mid-term evaluation – go/no go	5
Projects completed	2

<sup>\*</sup> collaboration, BioWin as main Cluster; \*\* collaboration, BioWin as secondary Cluster

#### 2 co-organized networking events:

- Anchoring clinical research in Belgium: a guided journey in a multistakeholder landscape
- GSK meets Belgian Universities 3rd Edition





# International development



The international strategy consists of consolidating the Strategic Activity Areas and strategic projects of the Cluster in selected territories where the Cluster has identified opportunities (research and economic growth) for members:

- Europe
- North America
- · Asia (China, South Korea and Japan)



#### The international strategy is based on 4 pillars:

- Ensure international visibility for Wallonia, the cluster and its members.
- Activate networking and networking between players from the best Biotech and Pharma hubs in the world.
- Foster the internationalization and development of members (especially SMEs) through strategic research and / or technology partnerships and exposure to specialist investors.
- · Support AWEX in its mission of attracting foreign investors and coordinating Economic Activity Parks.

### **Achievements**



#### 9 participations in national and international events in 2020

- BioEurope Spring
- Covid19 Virtual Partnering Event
- BioKorea
- · Bio Digital US
- · CEBR Annual Meeting
- On Helix
- Knowledge for Growth
- BioEurope Fall
- China Healthcare Summit

#### and 2 co-organized networking events

- European Market Access Days in Europe
- BSMA Europe Cell & Gene therapy session

#### Partner in 3 COSME interclustering projects

- S3MartMed, a European project identifying investment and collaboration opportunities in the medical technology sector
- CE4BIG, fostering European-wide collaboration between clusters and their SMEs
- MAGIA2Market, pursuing European strategic partnerships in medical technology (European Alliance for the Internationalization of innovative MedTech SMEs)

#### **Involvement in 3 European networks**

- Presidence of the CEBR, Council of European Bioregions (Network of 40 European health clusters)
- ECA (European Cluster Alliance) and direct contacts with different EC departments: DG Grow, DG Connect, DG health.
- EIT Health & EIT Manufacturing: BioWin is a network partner of the EIT Health Benelux initiative. In 2020, a connection with EIT France and its biomanufacturing initiatives has been initiated.





# Financial support

BIOWIN

Since 2019, BioWin has aided biotech and medtech companies with financial strategy, together with finding and applying for funding throughout Wallonia and Europe.

This new service is in addition to the 3 other services:

- R&I project support
- Skills development
- International business development

Over the past year, the cluster helped support the growth of companies by facilitating access to public and private financial resources.

### **Achievements**

BioWin's strengthened financial team has helped members find private or public funding sources to allow them to develop products and encourage company growth. BioWin co-organized a networking event, Euronext - "Health and Financing beyond borders" and now supports multiple member companies in their fundraising.







# Skills development



#### The Cluster's strategy for skills development is as follows:

- Contribute to sector monitoring
- Support the sector's economic development by helping to increase the employability of workers, in collaboration with training operators, colleges and universities.



### Achievements



In view of the talent shortage facing our sector, a study was entrusted to BioWin by the Office of the Minister of the Economy.

#### The aims of this study were:

- To qualify and quantify the talent needs of member companies of the Cluster within a 3-year horizon.
- To propose solutions to the Government. The following eight recommendations were made.
  - a. Raise awareness and inform young people and students about opportunities in the industry.
  - b. Deliver initial training that meets businesses' needs through better interaction between academia / high schools and companies < (with possible adaptation of business models).
  - c. Ensure long life training offer to guarantee the employability of talents throughout an individual's professional career. In particular, clarify the Walloon offer since businesses identified it as abundant but confusing.
  - d. Reform the system for financing training projects by Forem.
  - e. Make the deployment of work-study training (working while studying) in the Wallonia-Brussels Federation a political priority.
  - f. Accelerate the accreditation of the Bachelor in work-study program in bioindustry, to start training ideally from September 2021.
  - g. Develop longer-term internships in companies as part of certain courses to facilitate the integration of graduates.
  - h. Urgently address the talent shortage in the bioproduction sector and develop, in collaboration with a consortium of companies, an initiative:
    - 1 | that aims to ensure good coordination of the various training operators for greater efficiency
    - 2 | which contributes to increase synergies between actors who today work in a too dispersed way.



It has been a special year in terms of communication.



The aim was to keep members and the network as informed as possible about the pandemic (needs, offers, possibilities for collaboration, etc.) while maintaining a neutral position.

### **Achievements**



- Publication of the 2019 Annual Report.
- Brainstorming about a new website to better highlight the services of the cluster for its members and the Walloon ecosystem of the sector.
- Publication of a collection of Cluster member activities
   regarding the COVID crisis (annexe 1).
- Consideration for a better presentation of services for international prospects and to attract foreign investors. Updated thematic flyers (the Cluster's strategic areas of activity).
- Creation of a brand new, more professional corporate presentation reflecting the **new visual identity of BioWin**. Creation of a brand new, more professional corporate presentation
- Publication of now-weekly newsletters.
- Reinforced presence on social networks, especially during the COVID crisis.
- Articles published in the Belgian and international press. During the health crisis, BioWin was in great demand and many articles appeared in the press

(Trends, Echo, Biotech Finances, Hospitals, etc.). About sixty articles refering to the BioWin Cluster were published in 2020.





GOVERNANCE, TEAM & NEW MEMBERS



BioWin was established in 2006 as a not-for-profit organization.

Philippe Denoël has been the president of the Board of Directors since January 2018.



Philippe Denoel | President

**Hugues Bultot** | Vice-President

**Oberdan Leo** | Vice-President

**Didier Malherbe** | Administrator

**Damien Prieels** | Administrator

**Christophe Allard** | Administrator

Ingrid Dheur | Administrator

Thibault Helleputte | Administrator

Melanie Mestdagt | Administrator

**Jehan Lienart Van Lidth De Jeude** | Administrator

**Javier Martinez** | Administrator

Julie De Wever | Administrator

Jean-Luc Balligand | Administrator

**Michel Georges** | Administrator

**Carine Michiels** | Administrator

**Laurence Ris** | Administrator

Bertrand Moinet | Administrator

### The BioWin Team

### BIOWIN



Sylvie Ponchaut Managing Director



Delphine Ramelot
Administrative
Assistant



Olivier Poswick Director Investmen & Finance



Thierry Ferain

Director Innovation

& Growth



Marianne Ghyoot
Director Research
& Innovation



Joëlle Gahimbare
Project Manager European Collaborations
& Innovation



Damien Diop Head of Membership Development



Marc Dechamps
International Affairs
Representative



Carolina Heredia Membership Development Assistan



Alexandra Schiettekatte

Head of

Communications



Marine Di Vincenzo
Digital Communications
Manager



To specifically support the growth and development of its members, BioWin plans to cooperate more proactively with its associate members; service companies whose quality and expertise could provide great added value to the entire ecosystem. This partnership approach will enable BioWin to organize events around themes relevant to the concerns of Cluster members.

In 2020, BioWin signed two partnerships with Agio Capital & Business Solutions and Modis.



#### AGIO

Agio Capital & Business Solutions is an international advisory boutique with offices in Europe and Asia. The company provides financial & business solutions & partnership programs in Europe and Asia (focus China). Agio Capital & Business Solutions works closely together with its partner Agio Law which offers legal services & advice.

### modis

Modis is a team of over 300 life science consultants that can assist companies at every stage of the life science product life cycle, from drug development to patient care. The team provides solutions to accelerate business by facilitating connections between experts and companies.



Our partner Keyrus shared their expertise with our members focused on the digitalization of clinical trials. This came in the form of several webinars which were organized throughout the year and proved to be very beneficial to our ecosystem.



















































O P<sup>3</sup>Lab





**NEW MEMBERS** 

In 2020, 27 new members joined the cluster



**PROBARE** 

# BIOWiN

THE HEALTH CLUSTER OF WALLONIA

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