An interview with Mrs Sylvie PONCHAUT

Managing Director of the BioWin health cluster

What are the key figures for the biotech and medtech sectors in Wallonia?

Belgium, and more specifically Wallonia, has a rich and significant history in the field of life sciences, dating back centuries. The presence of industry leaders like UCB, GSK, Takeda and IBA has further solidified the country's position in the life sciences sector. Belgium is one of the most advanced hubs of excellence for biopharma and healthtech technologies today.

Compared to our neighboring countries, Belgium is by far the country with the highest per capita investment in biopharmaceutical R&D in Europe. While Belgium only represents 2.6% of the EU population, the biopharmaceutical industry accounts for 7.8% of jobs, 18.7% of exports and 19.3% of research and development expenditures within the EU. This puts Belgium in third, second and first place respectively in Europe. Zooming into BioWin's 139 industrial members located in Wallonia, the health ecosystem has been steadily growing since 2013. Over the last 10 years, average annual employment growth has been 5.3%. Employment in our member companies has doubled in 17 years. The added value of member companies amounted to €5.9 billion (member companies developing R&D or industrial production activities). There is no doubt that this is one of the most important sectors in the Walloon economy.



© BioWin

Could you tell us about BioWin’s strategy?

BioWin’s role is to accelerate innovation to address the public health challenges of the future and to develop knowledge, employment and the competitiveness of everyone involved in the health sector ecosystem in Wallonia. The mission of BioWin is to drive the growth of the health innovation ecosystem in Wallonia and to become the leading health ecosystem in Europe, bringing together biopharma and healthtech technologies for a greater economic and societal impact.

BioWin will continue to follow its strategy that was deployed at the outset: supporting the emergence and development of R&D projects; developing talents; integrating companies in international markets; forming and nurturing networks and supporting the growth of companies.

BioWin is focusing on internationalisation and interdisciplinarity in order to achieve its goals for the next 4 years. BioWin will offer its members new opportunities for R&D collaboration with the best ecosystems in the world, near or far, and will provide help to set up European projects.

To add to the value chains and nurture the health sector ecosystem, BioWin, in close collaboration with AWEX, will reinforce its efforts to attract foreign investors. And as part of the smart specialization goal in Europe, BioWin will be prioritising those areas of activity and technology in which Wallonia has a competitive edge. Our strategy is to build on the excellence in our 2 main strategic domains: (bio)pharmacy and healthtech technologies with a specific focus on advanced therapies, nuclear medicine and health

data.



© BioWin

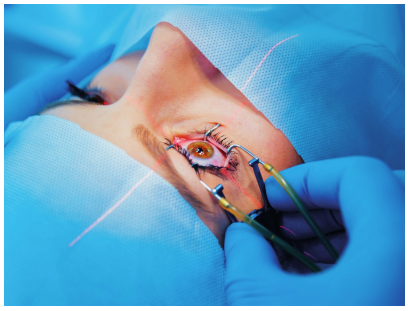
What services does BioWin offer its members?

BioWin brings together 90% of the health-biotechnology and medical technology players in Wallonia. The cluster therefore has a clear view of the technology value chains and an in-depth knowledge of the stakeholders in the region. This allows BioWin to offer its members the most appropriate services in terms of R&D, internationalisation, skills development and support for company growth. From early development in R&D to commercialization, BioWin provides support for projects arising from regional and international calls, and one-off assistance to SMEs and start-ups to support their economic development.

At the international level, BioWin works with the world's most innovative regions to help its members identify the best partners for business and research collaborations. BioWin's main focus is on networks and partnerships, forging links with key clusters and science parks.

Together with AWEX, BioWin helps Walloon companies increase their international activities by facilitating their visibility at key events in Europe, North America, South-East Asia and China. Together with other clusters in Europe, BioWin helps companies identify relevant gateways to enter key markets.

BioWin works to develop human capital, with a strategic focus on promoting innovation and growth in companies by (a) contributing to the forward management of skills and talents, (b) encouraging uniformity in the region's training initiatives, (c) expanding and enriching the pool of regional skills and talents, (d) helping to create bridges between university courses and industry. In addition, BioWin supports company growth by facilitating SME access to private sources of funding and by creating a favourable environment to attract and identify the best talent and expertise.



© BioWin

How does BioWin support its members in developing innovative projects and securing public funding?

BioWin initiates three calls for projects per year and offers sustained support in the development of the project proposals for participating consortia. For this support, BioWin's R&D team help identify the required skills, facilitate the creation of the proposal and provide critical input. Furthermore, the R&D team supports a consortium by optimizing the procedures that are required to obtain the public funding. BioWin also monitors all funded projects with a particular focus on the results generated. The R&D project portfolio includes 71 innovative projects, with 49 completed and 22 ongoing. 87% of the projects have short to medium time to market.

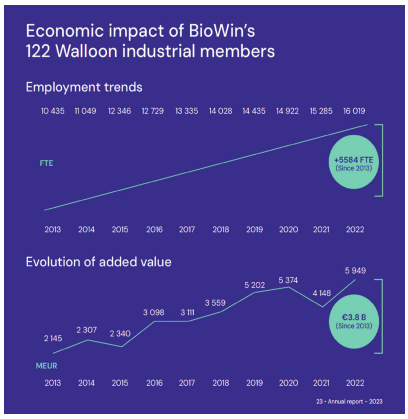
Can you elaborate on the strategic initiative BioWin is leading in the field of Advanced Therapies and how it is contributing to the region's ecosystem?

Belgium, and particularly Wallonia, have an ATMP ecosystem that is unique in Europe. BioWin, and its members, have been working for months on a strategic initiative focusing on advanced therapies, disruptive approaches that open new fields in the history of medicine by enabling patients to be cured – and no longer just treated. In collaboration with the SPW-EER, we contributed to setting up and selecting the ATMP-PIT research and innovation portfolio. This portfolio is made up of 3 thematic pillars, each comprising 4 collaborative work packages, and bringing together a total of 26 partners in the field of Advanced Therapies. Public funding accounts for around 60% of the budget, which totals nearly €82m. The success of this project illustrates the interest of large public-private technological partnerships and opens the door to the construction of additional portfolio projects in other domains of excellence in the region.

What partnerships have you developed in Europe and abroad?

BioWin is in contact with the world's most innovative regions to help our members to connect with the best possible partners. We offer global networking events by making extensive use of our networks and partners (hubs, clusters, science and technology parks). By working closely with AWEX (Wallonia Foreign Trade and Investment Agency), we accompany delegations at international Biopharma and Healthtech trade fairs (BioWin/ AWEX programme).

(1) cf. report published by Pharma.be
(2) cf. S3 Wallonie
(3) More information on the ATMP collaborative project



© BioWin

We also organise first-class matchmaking events to help members in their international development with different objectives (R&D, strategic or business partnerships), always focused on specific topics based on our Smart Specialisation Strategy (S3). Our international strategy targets the following geographic areas: Europe, North America (USA, Canada), Asia (Japan, South Korea).



© BioWin

What are BioWin’s objectives for the next three years?

We are driving the development of three major sectors. The first, our ‘historic sector,’ which has been evolving for over 60 years in Wallonia, is the biopharmaceutical sector, encompassing vaccines, biomedicines, and advanced therapy medicinal products (ATMPs), including gene, cellular, and tissue therapies. Simultaneously, we seek to consolidate the emerging and less structured medtech sector in Wallonia. This sector faces numerous challenges, particularly with respect to the European directive on medical devices, which significantly hampers its growth. However, we are beginning to reach a critical mass in the field of radiopharmaceutical products and the development of associated equipment. Lastly, we are promoting the e-health sector, focusing on digital solutions and AI applied to health data. We are collaborating with our Flemish counterparts to raise concerns with federal authorities on a range of issues, especially the secondary use of health data for research purposes, and to align ourselves with the European health data space.

How does BioWin envision its future role in expanding collaborations and evolving its strategy to strengthen Belgium’s position in the health and biotech sector?

We are poised to expand our outreach, particularly towards Flanders, fostering enhanced collaboration opportunities for our members. Through the unveiling of a comprehensive joint action plan with our Flemish counterpart, MEDVIA, we aim to cultivate strategic alliances with this esteemed ecosystem, further solidifying Belgium’s as the “Health and Biotech Valley of the future”. Secondly, by leveraging the insights gleaned from the ATMP-PIT project, we will forge additional transformative public-private partnerships. Given the sector’s pivotal role, the convergence of private enterprises and public authorities around impactful research and development endeavors holds immense

potential for our region, for the benefit of the patients. And furthermore, BioWin is steadfast in its commitment to evolving its revenue model, charting a course towards greater financial autonomy by introducing a set of innovative services for our partners and members. This strategic endeavor will not only augment our financial standing but also will enable us to present even more opportunities for our members and partners.

Key figures for the BioWin cluster (2024)

- 157 Industrial companies;
- 62 Service companies and partners;
- 5 universities;
- 4 Bioparks;
- 10 Research & training centers;
- 20 Foundations, federations and other regional public entities;
- 2 Investment funds;
- 19K direct jobs in Wallonia.



© BioWin