

BIOWIN

Annual report 2025

Strengthening Wallonia's life sciences and health ecosystem



BioWin Annual Report 2025

From Coordination to Impact

In 2025, BioWin confirmed its role as a strategic engine of Wallonia's health innovation ecosystem – converting scientific excellence into industrial value, international positioning and societal impact.

In a context marked by intensifying global competition, constrained funding and rapid technological change, BioWin made a clear strategic choice: focus, scale and deliver impact.

This translated into the targeted prioritisation of advanced therapies (ATMPs), nuclear medicine and selected HealthTech segments, strengthening key value chains and reinforcing Wallonia's position within the European health innovation landscape.

Delivering Measurable Impact

BioWin generated tangible results across the innovation ecosystem:

- €81.7M structured in collaborative R&D investments in advanced therapies
- A portfolio of 81 projects spanning the full innovation value chain
- A strategic SWOT analysis in nuclear medicine, mobilising the ecosystem and defining a shared roadmap to consolidate regional leadership
- Coordination of key national initiatives such as RAD4MED, strengthening Belgium's integration and visibility in radiopharmaceutical innovation
- Expansion of international partnerships and industrial collaborations, increasing access to global innovation networks
- Contribution to Belgium's positioning in emerging fields including vaccine trials, precision medicine and next-generation therapies

Orchestrating and Scaling the Ecosystem

Beyond funding and project support, BioWin acted as a central orchestrator, aligning academia, industry, hospitals and public authorities to:

- Accelerate innovation
- Reduce fragmentation
- Build critical mass at Belgian and European levels

A key milestone in 2025 was the strengthened collaboration with Flanders, demonstrating the potential of a more integrated Belgian innovation model and unlocking new opportunities for scale, funding and competitiveness.

Strengthening the foundations

BioWin also contributed to shaping future capabilities by:

- Anticipating skills gaps in advanced therapies, biomanufacturing and AI-driven R&D
- Further structuring strategic ecosystems, notably in ATMP and nuclear medicine
- Preparing large-scale initiatives, including a national vaccine trial network to enhance clinical capacity and coordination

Acting as a strategic interface between research, industry and public policy, BioWin ensured alignment between innovation, industrial development and regional priorities.

Looking Ahead

The ambition is clear: scale faster, integrate better and compete globally.

In a competitive and fragmented European landscape, value creation will depend on the ability to structure ecosystems, accelerate industrialisation and secure international positioning.

BioWin will continue to act as a catalyst – ensuring that innovation is not only generated, but transformed into economic value, industrial leadership and tangible benefits for patients and society.



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01

MISSION, VISION,
APPROACH & STRATEGY

Overview

BioWin acts as the strategic interface between research excellence, industrial development and public policy, accelerating the transformation of innovation into economic and societal value. In 2025, BioWin reinforced its strategic role, aligning research, innovation and industrialisation with regional and European priorities.

Over time, BioWin has focused on high-impact sectors such as advanced therapies (ATMPs), biopharma and nuclear medicine, while structuring MedTech and digital health. BioWin prioritised key areas, strengthened partnerships and enhanced Wallonia's international visibility in a more constrained environment.

As a facilitator and connector, BioWin structured value chains, fostered collaboration and supported high-impact projects, contributing to a more resilient and competitive life sciences ecosystem in Europe.

We sincerely thank our community of 240+ member organisations, whose trust and commitment continued to drive innovation and help address tomorrow's public health challenges.

Our mission

To drive the growth of the health innovation ecosystem in Wallonia.

Our vision

Become the leading health ecosystem in Europe, bringing together biopharma and healthtech technologies for a greater economic and societal impact.

Our approach

Progressively, its role has significantly expanded—from supporting research and innovation to actively shaping regional innovation strategy and contributing to the implementation of industrial policy, in close collaboration with stakeholders across and beyond the Walloon ecosystem.

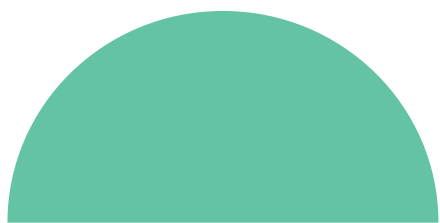


Our strategy

BioWin brings together Walloon entrepreneurship, science, medicine and engineering to transform innovative biopharma and healthtech ideas into concrete health outcomes.

Its strategy is structured around four key domains: advanced therapies (ATMPs), a strategic priority driving European leadership; nuclear medicine, building on strong regional and national know-how; BioPharma, a historical pillar encouraging high-value collaboration; and MedTech and digital health, emerging areas supporting future growth.

Across these domains, BioWin drives collaborative innovation, facilitates high-impact projects and strengthens value chains, contributing to Wallonia's position as a competitive life sciences ecosystem in Europe.



Fully Aligned with the Regional Innovation Strategy

BioWin operates in full alignment with Wallonia's Smart Specialisation Strategy (S3), guiding regional research, innovation and industrial policy. As lead cluster of the Strategic Innovation Domain "Innovating for a Stronger Health" (DIS 2), BioWin coordinates the three Strategic Innovation Initiatives (ATMP Wal, MedReSyst and MedTech Wallonia), ensuring coherence and impact across the ecosystem.

In 2025, BioWin supported the implementation of these strategic innovation initiatives, strengthened collaboration across stakeholders, and contributed to assessing their impact and shaping their future positioning, reinforcing Wallonia's role in the European health innovation landscape.

Focus areas:

Advanced therapies

BioWin coordinates a strong portfolio of collaborative R&D projects worth €81.7 million (ATMP-PIT). These projects are critical to maintaining Wallonia's leadership in cell and gene therapies.

Nuclear medicine

With acknowledged expertise in isotopes, radioligand therapies and diagnostics, Wallonia is well-positioned to reinforce its leadership in this field. BioWin actively enables this ambition by nurturing focused projects that enhance this strategic advantage. BioWin also ensures the coordination of the Belgian RAD4MED network, strengthening Belgium's integration and visibility in radiopharmaceutical innovation

Biopharma

As a mature sector in Wallonia, Biopharma remains central. BioWin fosters partnerships and initiatives such as a clinical trial network for vaccines, building on existing industrial, clinical and academic capabilities.

Medtech & Digital health

These areas are gaining traction. BioWin supports targeted actions to encourage their integration into the region's health innovation framework.

Making strategic choices to deliver impact

Sylvie Ponchaut, CEO

2025 has been a year of choices and of responsibility.

In an increasingly unstable environment—marked by geopolitical tensions, constrained funding, intensified global competition and rapid transformation in health technologies—BioWin has made a clear decision: **to focus, and to deliver impact.**

We have concentrated our efforts where **Wallonia can truly lead**: advanced therapies, nuclear medicine, and selected high-potential segments in MedTech and digital health.

This is not a positioning on paper. It is reflected in structured, ambitious project portfolios—such as the ATMP–PIT programme—mobilising significant investments and positioning our ecosystem at the forefront of European innovation.

At the same time, we have consolidated our alliances—regionally, nationally and across Europe. Because today, **no ecosystem succeeds in isolation.** Through strategic partnerships, including reinforced collaboration with Flanders and a stronger role at the Belgian level, we are building the critical mass required to access funding, accelerate innovation, and anchor Wallonia in international value chains.

2025 also marks a new level of maturity for BioWin.

Our organisation has evolved, our team has strengthened, and our operating model has become more focused and agile.

In a transforming regional landscape—where coordination, simplification and alignment are no longer optional—BioWin is ready to fully assume its role as **a structuring force for the ecosystem.**

The challenges ahead remain considerable: access to capital, international competition, talent shortages, industrial scale-up, and accelerating innovation cycles.

In response, one path is clear: **focus, collaborate, and execute with discipline and ambition.**

More than ever, value creation will depend on our ability to align efforts, structure value chains, and position ourselves within strong European dynamics.

The achievements presented in this report are not coincidental.

They reflect a deliberate strategy: structuring key sectors, enabling high-impact collaborative projects, strengthening national and international positioning, and increasing the visibility and credibility of our ecosystem.

Finally, I would like to address our members directly.

In a demanding and sometimes uncertain environment, you continue to invest, innovate and take risks. Your resilience, your capacity to adapt, and your commitment are the foundation of this ecosystem.

It is this energy that drives us. It inspires us—and above all, it commits us.

To rise to the challenge.

To create the conditions for your growth.

To turn this momentum into lasting success, for patients, for the economy, and for society.



A word from our President

Xavier Hormaechea, Managing Director UCB Belgium, President

First and foremost, I would like to express my sincere gratitude to the members of our Governing Board and to all our stakeholders for their unwavering commitment and engagement throughout the past months.

In many respects, **2025 has been a year marked by both achievements and challenges**—for our members, and for our broader ecosystem.

As we finalize this annual report, the world around us feels more unpredictable than ever.

In such an environment, it can be tempting to lose our compass amid constant noise and short-term pressures. Yet short-term strategies will never meet long-term imperatives.

The reality is clear: **since the creation of BioWin, 20 years ago, investing in life sciences in our region has proven to be one of our strongest drivers of success.** And as we look beyond the clouds of today, one thing remains certain—we will need more innovation and more solutions to address the public health needs of both today and tomorrow.

BioWin's DNA is to **create the conditions in which our region's competitiveness can fully thrive.**



When we align around the right technologies and shared priorities, the collective impact is always greater than the sum of its parts.

As we embark on the transformation of our regional innovation landscape, we do so with **confidence, determination, and optimism.**

Thank you for your trust in BioWin and in our exceptional team. I look forward to continuing this journey together.

A handwritten signature in black ink, appearing to be 'X. Hormaechea'.



02

INNOVATION

Supporting collaborative
health innovation in
Wallonia

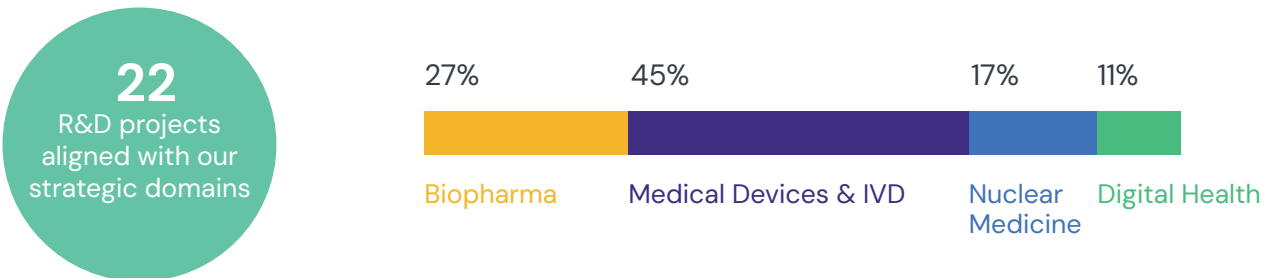
Driving collaborative R&D

BioWin's R&D team supports the full lifecycle of collaborative projects, from emergence to completion. Through three annual calls, BioWin stimulates new ideas, builds consortia and structures high-quality proposals with expert input.

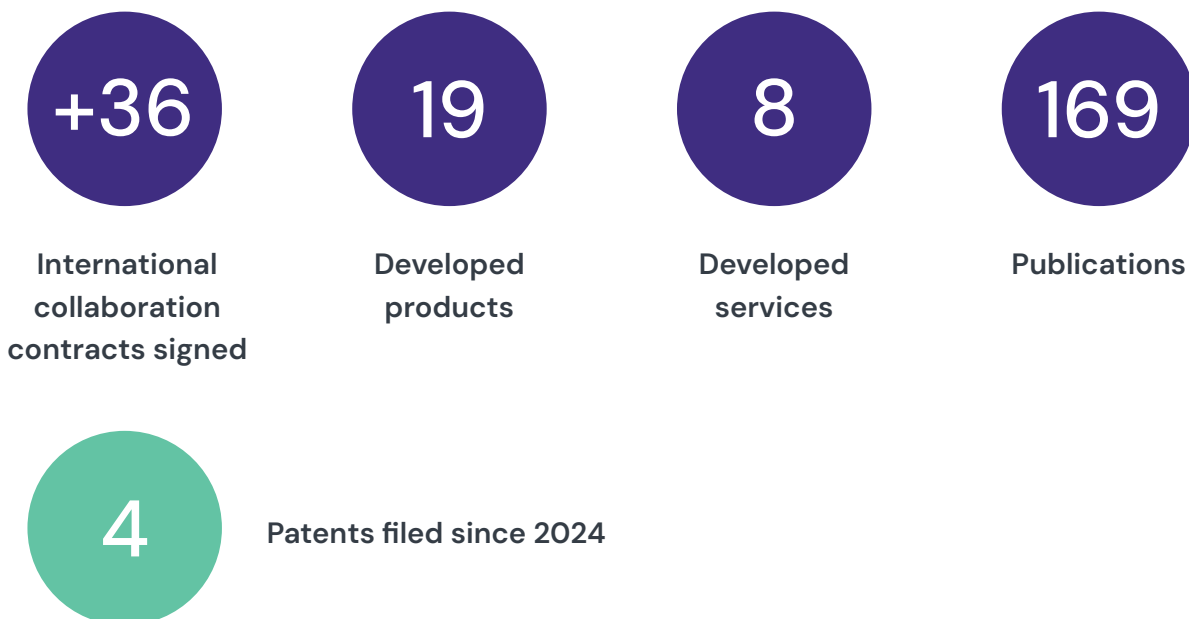
BioWin ensures rigorous follow-up through key milestones, from kick-off to mid-term evaluations, with a focus on execution, risk management and value creation. In 2025, all supported projects remained fully aligned with Wallonia's Smart Specialisation Strategy.

Global overview:

The portfolio includes **81 R&D projects**, with **59 completed** and **22 ongoing**.



Over the last 5 years:



Key achievements in 2025:

3

Project calls

37

Project application reviews

18*

Project development up to maturity assessment

19

Projects entering maturity assessment

12

Project development up to CSI submission

2

Project kickoffs

2

Projects completed in 2025



* Some of the projects were co-developed with other cluster partners

ATMP-PIT: structuring Europe's next generation of advanced therapies

Launched in 2023 with the support of BioWin and the Walloon Public Service, ATMP-PIT is a flagship collaborative initiative covering the full value chain of advanced therapies. Bringing together 21 companies, 4 universities and 1 research centre, the programme is structured around three pillars – gene therapy, cell therapy, and innovative approaches such as exosomes and bacteriophages – across 12 multi-partner work packages.

Key achievements in 2025:

After two years of activity, 7 international industrial collaboration agreements have already been signed, along with 30 publications.

Operating in a demanding environment, the programme demonstrated strong resilience. Several consortia successfully adapted to major challenges, including partner reorganisations and bankruptcies, through mitigation plans, governance adjustments and redistribution of activities, ensuring continuity and preserving key results.

Since 2023, BioWin has played a central coordination role throughout the year,

monitoring progress, supporting reporting obligations, facilitating interactions between partners and contributing to the management of critical issues in coordination with public authorities.

ATMP-PIT continues to act as a strategic lever to strengthen Wallonia's leadership in advanced therapies. It illustrates the capacity of large-scale public-private partnerships to accelerate innovation, structure value chains and position the region as a competitive and credible player at European level.



Nuclear medicine: consolidating a strategic growth engine

Nuclear medicine is a strategically mature and fast-growing sector in Wallonia, supported by a dense and fully integrated value chain spanning academic research, clinical applications, industrial development, specialised equipment and logistics. In a context of sustained double-digit global growth driven by radiopharmaceuticals, targeted therapies and advanced imaging, BioWin reinforced its strategic focus on this high-potential ecosystem in 2025.

Key developments in 2025:

A major milestone was the completion of a comprehensive SWOT analysis, conducted with PwC and based on extensive stakeholder consultations across academia, hospitals, industry and public institutions. This work led to the definition of a strategic roadmap, providing a shared vision and identifying priority actions to further structure the value chain and strengthen international positioning.

In parallel, BioWin significantly intensified its ecosystem coordination role. Dedicated resources were reinforced to ensure continuity and accelerate implementation, while numerous bilateral engagements with key stakeholders helped align priorities, identify opportunities and foster a co-construction dynamic at both regional and national levels.

Visibility and international positioning were further strengthened through targeted actions, including a strong focus on nuclear medicine during BioWin Days 2025, international outreach at EANM, and the promotion of the ecosystem through dedicated communication tools, success stories and a sector-specific brochure.

To stimulate future innovation, BioWin also organised a co-creation workshop gathering the full ecosystem, leading to the identification of key challenges and the emergence of new collaborative project opportunities.

Building on these actions, several collaborative R&D initiatives are progressing, including interregional projects with Flanders and cross-cluster collaborations, further reinforcing Belgium's integrated approach.

Through this combination of strategic analysis, ecosystem mobilisation, international engagement and coordination of the RAD4MED network, BioWin has significantly strengthened the foundations of the nuclear medicine sector. These efforts position Wallonia as a leading hub for innovation and confirm nuclear medicine as a key driver of regional growth and competitiveness.



MedTech & Digital Health: accelerating deployment

MedTech and digital health are gaining momentum as key innovation domains in Wallonia, supported by strong alignment with S3 and IIS initiatives.

In 2025, the Medtech sector demonstrated once again its innovation potential with the launch of two collaborative projects in in vitro diagnostics. DIADENO develops a non-invasive diagnostic solution combining molecular biomarkers and AI, while eSPRiDIAG aims to deliver a fully automated, real-time optical diagnostic platform. Both projects address unmet clinical needs and strengthen the region's technological positioning.

Digital health initiatives continue to evolve within the MedReSyst framework, reinforcing the shift toward 4P medicine and expanding the ecosystem of stakeholders involved in data-driven healthcare innovation.

Together, these developments confirm the transition toward more mature, high-impact innovation activities in both fields.

Advancing Clinical Trial Capacity in Belgium

BioWin led a strategic feasibility study, with the support of Deloitte, commissioned by AWEX and the Walloon Government, to establish a Belgian vaccine trial network – a key step to reinforce national coordination, increase clinical trial capacity and position Belgium in the European vaccine ecosystem.

Bridging regions: advancing interregional innovation with Flanders

In 2025, BioWin and BIOVIA took a major step forward in fostering interregional collaboration between Wallonia and Flanders, translating growing industry demand into concrete joint R&D initiatives.

Two flagship projects emerged as pilot cases. REVIVE (ATMP) successfully secured dual regional support (VLAIO and SPW) and officially launched in early 2026, while NEXUS (nuclear medicine) achieved final approval in March 2026 and is currently under conventioning. These projects bring together leading industrial and academic players from both regions, leveraging complementary funding schemes without the need for new instruments.

Beyond their scientific ambition, these initiatives demonstrate the feasibility of cross-regional project structuring, through coordinated evaluation processes, joint expert involvement and alignment with regional requirements.

They also provided valuable insights into remaining challenges – including call synchronisation, administrative constraints and alignment of valorisation frameworks – which will need to be addressed to fully unlock interregional collaboration potential.

As first-of-their-kind pilots, these projects pave the way for a more integrated Belgian innovation landscape, strengthening competitiveness through closer collaboration across regions.





03

DEVELOPMENT

Leveraging our network to
fuel health innovation

Talent development: structuring skills for future innovation

In 2025, talent development remained a strategic priority for BioWin, addressing the growing need to anticipate skills in a rapidly evolving scientific and technological landscape.

Acting as an ecosystem integrator, BioWin mobilised industry, academia and training stakeholders to better align skills supply with emerging needs in life sciences. These activities, conducted with private funding, focused on delivering concrete insights and actionable recommendations to strengthen the regional talent pipeline.



Key actions and insights in 2025:

• Anticipating emerging skills in AI & data for R&D:

A dedicated workshop with leading industry players (GSK, UCB, J&J) highlighted a rising demand for hybrid profiles combining life sciences and data expertise, as well as gaps in integrated training pathways.

• Structuring talent strategies for advanced therapies (ATMP)

A large-scale initiative enabled the mapping of skills needs across the full value chain (R&D, manufacturing, quality, regulatory), identifying critical shortages and misalignments with current training offer.

• Delivering operational recommendations

Including modular training programmes, hybrid learning pathways, stronger academia–industry partnerships, mentorship initiatives and improved visibility of career opportunities.

Beyond these actions, BioWin helped reinforce the overall ecosystem by promoting collaboration, enabling a coordinated approach and supporting a shared vision for skills development, positioning Wallonia as a competitive hub capable of attracting and developing high-value talent.

Following an evolution of the regional policy framework, these activities were concluded in October 2025, marking the end of BioWin's direct involvement in talent development while leaving a strong foundation for future initiatives.



International development

Helping our members build their network and meet potential partners

In 2025, BioWin further strengthened the international positioning of Wallonia's life sciences ecosystem. In close collaboration with AWEX and through strategic partnerships, it supported companies and research organisations in expanding their global reach and connecting with leading innovation networks.

Our international strategy focused on Europe and North America (USA), with priority domains including advanced therapies (ATMP), biomanufacturing, and nuclear medicine.



Key achievements 2025

• Strengthened international collaborations in advanced therapies and bioproduction

Development of strategic partnerships with leading European and North American clusters and stakeholders, reinforcing integration into global innovation networks.

• Participation in major international events

Active presence at key events such as BIO International Convention (Boston), BIO-Europe Fall (Vienna), LSX World Congress (London), Swiss Biotech Days (Basel), and EANM (Barcelona), enhancing the visibility of the Walloon ecosystem.

• Increased visibility and positioning of Wallonia

Organisation of workshops, participation in high-level panels, and deployment of structured communication tools (success stories, sector maps, promotional materials) to strengthen international attractiveness.

• Highlight on Belgium's events

Co-organisation of initiatives such as Science for Health with Biovia, reinforcing Belgium's positioning and generating new collaboration opportunities.

• Support to AWEX and investor outreach

Contribution to international promotion through targeted workshops, strategic content, and support to investor engagement, particularly in ATMP and nuclear medicine.

Looking ahead

In 2026, BioWin will continue developing international partnerships while supporting AWEX in attracting new companies and investment to Wallonia.

BIO-EUROPE®

Where partnering
becomes the science
of connection

OCT. 3-5, 2025
VIENNA, AUSTRIA

40
SINCE 1985

EA2
NMI

Annual Congress of the European Association of Nuclear Medicine
BARCELONA

OCTOBER 4-8, 2025
eanm25.eanm.org



LSX WORLD CONGRESS (LONDON)

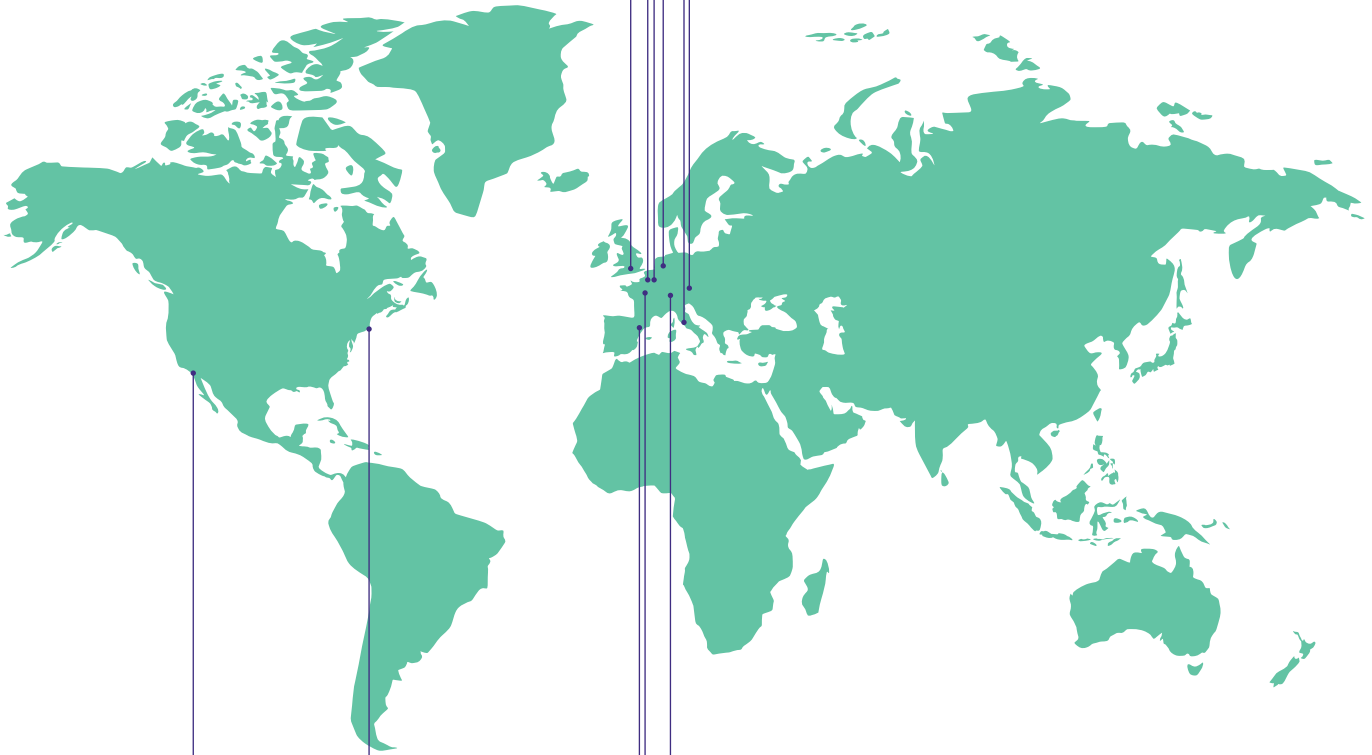
SCIENCE FOR HEALTH (BRUSSELS)

PITCH & MATCH WITH FLANDERS VACCINE (LEUVEN)

BIOEQUITY EUROPE (BRUGES)

CELLS & GENE THERAPY CONGRESS (ROMA)

BIO-EUROPE FALL (VIENNA)



MISSION PRINCIÈRE CALIFORNIA

SWISS BIOTECH DAYS (BASEL)

CONGRÈS BIOPRODUCTION (TOURS)

EANM (BARCELONA)

BIO INTERNATIONAL CONVENTION (BOSTON)



Swiss Biotech Day 2025

May 5-6, 2025 – Congress Center Basel, Switzerland





04

PROMOTION

Amplifying health
innovation visibility and
engagement

Key achievements 2025

Growing visibility and media positioning

Media visibility around health innovation in Wallonia continued to grow across specialised, economic and audiovisual channels, further highlighting the region's expertise and ecosystem dynamics.

Key highlights include:

- A **strategic position paper** on Belgium's role in European health innovation, contributing to the public debate on the sector's future
- Strong visibility of the Walloon life sciences network at the **BioWin Days 2025**
- Strategic partnership announcement with the **Oncidium Foundation**, highlighting Belgium's leadership in nuclear medicine
- Institutional visibility through an interview in L'Echo, further supporting the ecosystem's credibility and visibility

Digital communication and community engagement 2025

BioWin continued to expand and engage its digital community through targeted and high-performing communication channels:

2123

Subscribers to our newsletter

15k⁺

Followers on LinkedIn

5k

Engagements on social network

Press relations and media campaign:

5

Press releases

33

Articles in the Belgian press

9

Articles in the international press

Website:

>11k

Active users reached on biowin.org

Number of member relays and mentions

360+

Across our digital channels

In 2025,

- **Strengthened strategic content production** to shape a clear and distinctive narrative around the Walloon ecosystem
- **Showcased innovation through success stories** featuring leading companies (Trasis, Abscint, Bioxodes, Novadip)
- **Expanded international outreach** via targeted editorial content
- **Enhanced visibility of initiatives and events** through diverse formats (articles, press releases, videos)

Main events

BioWin organised and co-organised several high-impact events throughout the year, to boost innovation and elevate Wallonia's health ecosystem.

In 2025, BioWin organised and co-organised a series of structuring events aimed at strengthening collaboration between academic, industrial, hospital, and institutional stakeholders at regional, national, and international levels.

These initiatives played a key role in fostering the emergence of collaborative projects, structuring strategic value chains, enhancing the visibility of the ecosystem, and connecting stakeholders to innovation and funding opportunities.

BioWin Annual Dinner: a memorable celebration of impact

A memorable celebration of the Walloon life sciences ecosystem – where innovation transforms patients' lives:

- Gathered 137 participants (C-level) from across the ecosystem
- Brought together companies, academics, investors and institutional representatives in a unique networking setting
- Celebrated the collective impact of innovation in health and its tangible benefits for patients

Strengthening interregional collaboration, particularly with Flanders

Collaboration with Biovia (Flanders) intensified in 2025, notably through the joint organisation of events such as Science for Health. This dynamic contributes to enhancing Belgium's visibility as a coherent and competitive ecosystem, while ensuring a strong positioning of Walloon stakeholders within these initiatives.

Innovation Lab 2025: accelerating collaboration

On 22 May 2025, the BioWin Innovation Lab gathered over 100 participants from industry, academia, and hospitals around key health data challenges.

Organised with the three IIS of the DIS2, the event generated new collaborative R&D ideas through structured ideation sessions, focusing on AI, 4P medicine, telemedicine, and the digital and sustainable transition.

This 2025 edition played a key role in fostering cross-sector exchanges and shaping future collaborative initiatives.



Four events, uniting Belgium's regions

BioWin Days 2025: strengthening visibility and connections

On 23–24 September 2025, BioWin Days, the flagship event of the year, gathered over 380 Belgian and international participants.

Day 1 featured thematic conferences covering ATMPs, HealthTech, vaccines, and nuclear medicine, with contributions from industry leaders, academics, investors, and regulatory authorities. Day 2, "BioWin on Tour," offered visits to key sites such as the BioPark in Gosselies, LégiaPark in Liège, and leading companies, showcasing regional infrastructure and expertise.

The 2025 edition strengthened collaborations, enhanced the international visibility of the ecosystem, and connected stakeholders to new innovation opportunities.

GT4Health Day 2025: advancing ATMP collaboration

On 4 June 2025, the GT4Health Day brought together Belgian academic and industrial stakeholders active in gene therapies.

The event showcased the progress of the GT4Health project and its integration within the ATMP-Wal strategic initiative, while strengthening interactions between partners.

It contributed to further structuring the advanced therapies value chain in Belgium and reinforcing national collaboration in this rapidly evolving field.

Science for Health 2025: fostering interregional collaboration

On 4 November 2025, Science for Health, co-organised with Biovia, brought together a Belgian and international audience to explore major transformations in the healthcare sector.

Focused on advanced therapies and emerging therapeutic modalities, the event fostered interregional dialogue and strengthened collaboration between research, industry, and clinicians.

This 2025 edition highlighted Belgium's capacity to position itself as an integrated and innovative health ecosystem.

Inter-IIS Event 2025: shaping the future of healthcare

On 9 September 2025, the inter-IIS event "Building the health of tomorrow today," co-organised with MedReSyst and MedTech Wallonia, gathered 184 participants from academia, hospitals, and industry.

Focused on 4P medicine, the event fostered interdisciplinary exchanges and explored new collaboration opportunities around the hospital of the future.

Interactive workshops helped identify key challenges and structure joint initiatives between IIS, contributing to a more coherent and integrated health ecosystem.





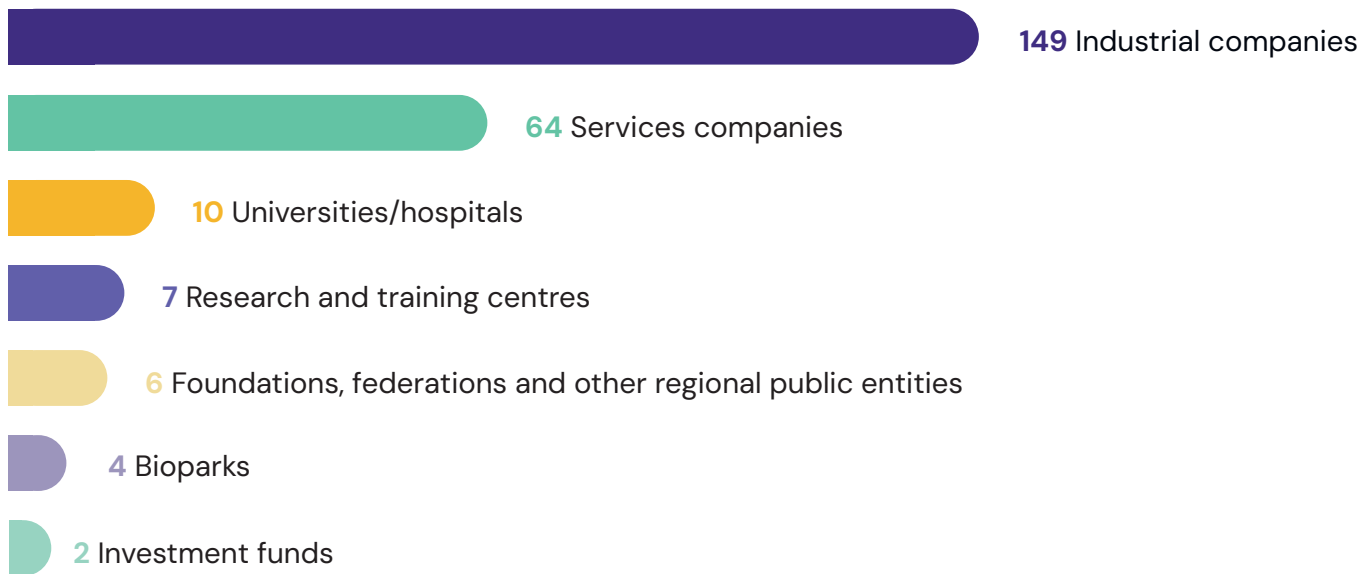
05

REGIONAL HEALTH ECOSYSTEM

A diverse and growing ecosystem of active members

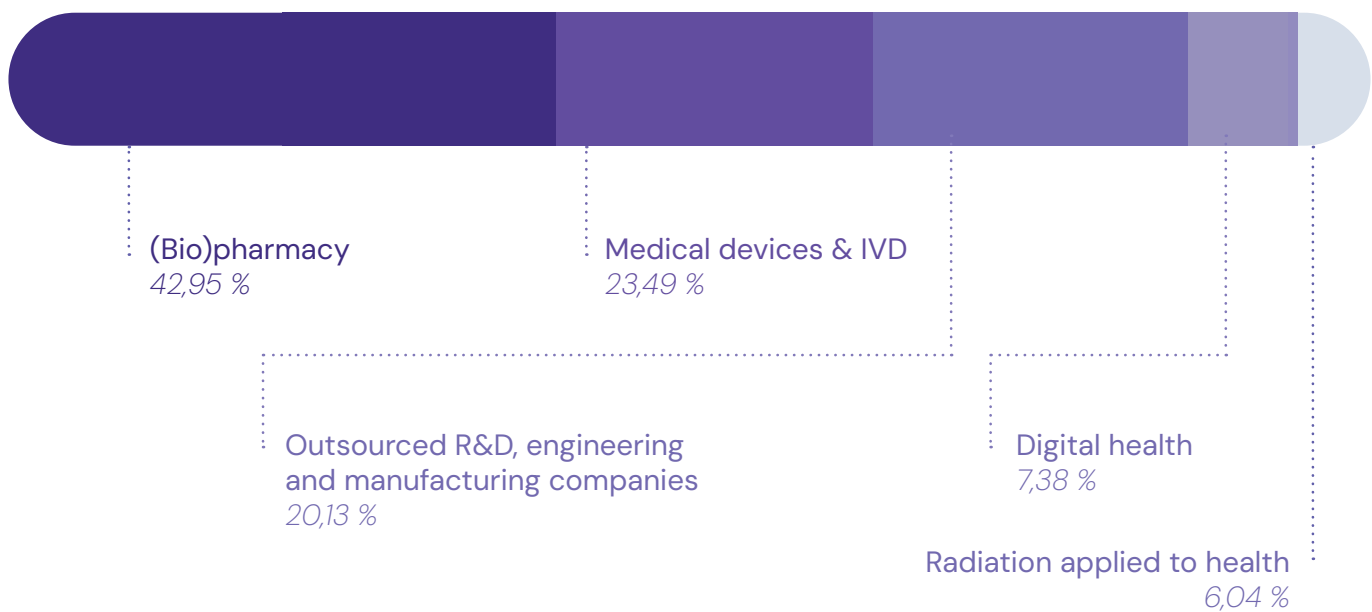
More than 90% of the biopharma and health-tech stakeholders in Wallonia

BioWin members and partners distribution



Distribution of BioWin's 149 industrial companies members

Technological domain distribution



Visit our [member](#) & [partner directories](#)

A decade of growth for health innovation in Wallonia

Among the industrial companies member of BioWin, 120 are located in Wallonia. The health ecosystem in Wallonia has been steadily growing since 2014.

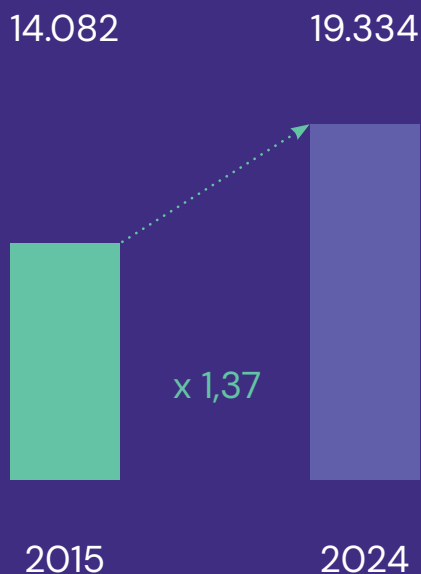
Over the last 10 years, employment in our member companies has grown by nearly 40%, representing an average annual growth of around 3.5%.

The added value of our member companies reached €9.7 billion in 2024, confirming the sector as one of the key pillars of the Walloon economy.

Economic impact of BioWin's Walloon 120 industrial members

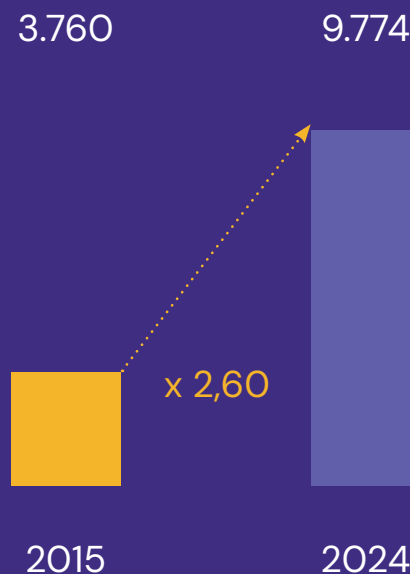
Employment trends

FTEs



Evolution of added value

in billions €



Membership development

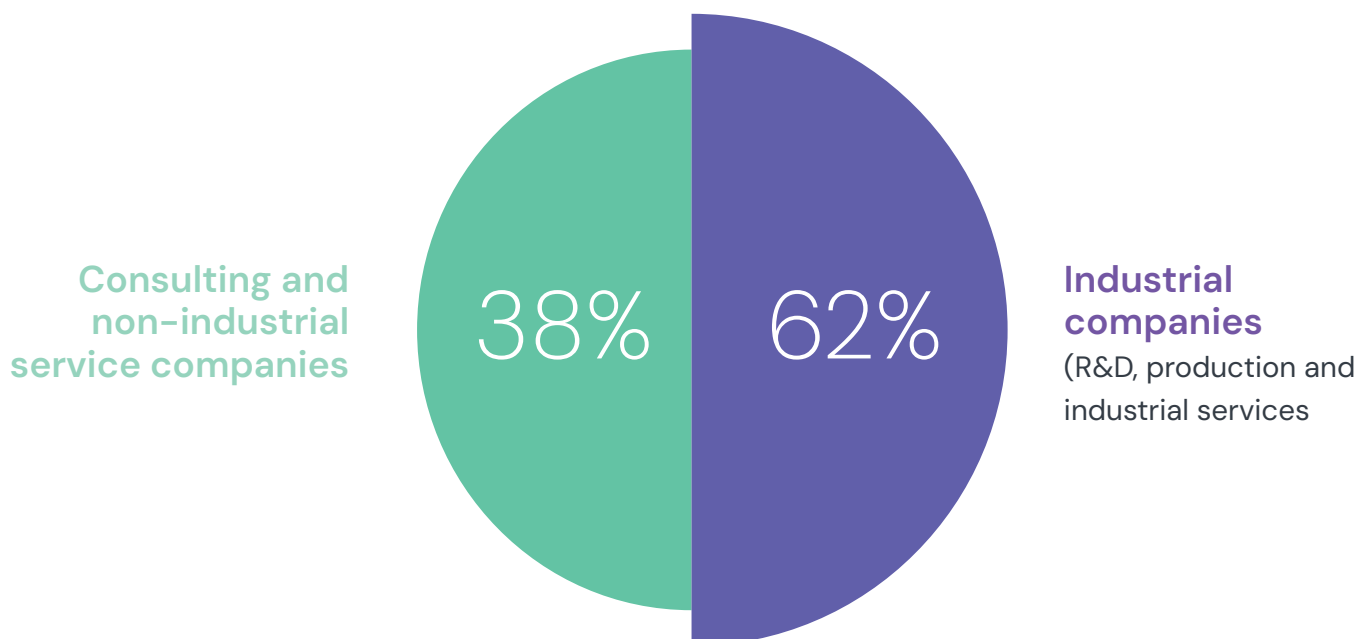
In 2025, BioWin recorded 28 new members, while also observing 26 departures and several restructuring situations (bankruptcies, mergers, or reorganizations).

This evolution reflects:

- the cluster's continued attractiveness, including for new international players and emerging profiles;
- but also a phase of sector consolidation, characteristic of innovation cycles in the life sciences, particularly in a more demanding economic context;
- The new members reflect the growing diversity of the ecosystem, including:
 - innovative biopharma and medtech companies;
 - international companies;
 - specialized service providers (quality, regulatory, engineering, data, etc.).

A total of 28 new members and partners

BioWin welcomed 28 new members in 2025, showing that companies and organisations continue to see value in joining our network. The new members come from different areas of the life sciences field and reflect the ongoing interest in being part of a professional and collaborative community. The breakdown of new members is as follows:



They joined the network in 2025

CROIX-ROUGE DE BELGIQUE, CLINIGEN CLINICAL SUPPLIES MANAGEMENT, COMATE, ANTLERON, BECTON DICKINSON BENELUX, BEUN - DE RONDE - SERLABO, BIOCUBIK, CUREWIKI, ESOX LUCIUS, HIRUNDO BIOSCIENCES, ICURE BELGIUM, NATIX, QP PRO SERVICES, QUIDDITAS, SAMANTREE MEDICAL, TEBU-BIO, VORTAL, IASO DISCOVERY, SMADMINX, BECRO ASBL, HRONE, JANSEN CLEANROOMS & LABS, KLARO CARDS, NORMEC ADVIPRO, OOHOO BV, SOPARTEC, WATSON & CRICK HILL BY KADANS SCIENCE PARTNER, YELIDO.

06 GOVERNANCE & TEAM



Governance

The Board of Directors, renewed every three years, has been in place since June 2023 and will serve until June 2026. Since 2024, its composition has been strengthened with the integration of five hospital representatives, enhancing the representation of the healthcare sector within BioWin's governance.

In parallel, BioWin has further reinforced its governance framework to support the evolution of its missions. A Strategic Advisory Board (SAB) has been established as an independent advisory body, providing external perspectives on the cluster's strategic orientations. The SAB convened twice in 2025, contributing to the refinement of BioWin's strategic roadmap in alignment with evolving sector challenges.

President:

Xavier Hormaechea, UCB Belgium

Vice-presidents:

Mélanie Mestdagt, EyeD Pharma

Serge Schiffmann, ULB

Large companies:

Philippe Denoel, GSK

Cristiana Gameiro, IBA

Florence Xhonneux, Eurogentec Kaneka

SMEs:

Alfred Attipoe, Comunicare

Sébastien Linard de Guertechin, Telix

Denis Dufrane, Novadip

Hugues Wallemacq, EXO Biologics

Universities:

Jean-Christophe Renauld, UCLouvain

Anne-Emilie Decleves, UMon

Brigitte Malgrange, ULiège

Carine Michiels, UNamur

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Économie | Industrie | Recherche | Numérique

(Cabinet du Ministre Pierre-Yves Jeholet)

2025 marks a pivotal turning point for BioWin and for Wallonia's life sciences ecosystem.

It closes over two decades of competitiveness cluster policy that successfully built a dense, high-quality, and economically impactful ecosystem.

In a challenging global context—characterized by reduced funding, geopolitical uncertainty, and increasing competition—BioWin has deliberately shifted from expansion to focus, consolidation, and impact-driven prioritization. By concentrating on high-potential domains in advanced therapies, nuclear medicine, HealthTech, and biopharma, BioWin continues to strengthen Wallonia's strategic positioning in Europe.

At the same time, 2026 opens a new chapter with the transition toward a renewed innovation cluster model. BioWin has proactively prepared for this shift, reinforcing its ability to mobilize private funding and demonstrating the value of its services—while navigating structural resource constraints inherent to a small region.

Looking ahead, scale and collaboration will be critical success factors. Strengthening

integration across Belgium—particularly with Flanders and Brussels—will be essential to reach critical mass, enhance international visibility, and capture investment opportunities in an increasingly competitive European landscape.

The success of this transition will depend on clear alignment between ambitions and resources, as well as on a strong, trust-based partnership with public authorities. Without this, there is a tangible risk of eroding the achievements built over the past twenty years.

In this context, life sciences remain a strategic pillar for Wallonia, contributing to innovation, high-value jobs, and European health sovereignty.

BioWin intends to play a central role in this new phase—acting as a catalyst for collaboration, structuring high-impact initiatives, and positioning Wallonia as a leading health innovation hub in Europe.

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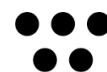
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