



LIFE SCIENCES FLANDERS

Prof. Dr. Ann Van Gysel,
Managing Director FlandersBio



FLANDERS, BELGIUM

Centrally Located Biotech hub

SUCCESSFUL BIOTECH HUB

- World renowned research centers, universities and hospitals
- 143 life sciences companies with biotech activities
 - 118 conduct innovative R&D
- Flanders ranks no 2 in Europe
 - Total market cap, stock listed biotech companies
- Flanders Ranks no 1 in Europe
 - Annual life sciences convention >900 participants

LIFE SCIENCES AREAS

- Medical Biotech - focus on healthcare, from diagnostics to therapeutics
- Plant Biotech - largest R&D hub in Europe, from molecular breeding to GMOs
- Industrial Biotech - focus on bioprocessing, from enzymes to biofuels and food

STRONG IN R&D

- Innovative research
- Strong life sciences companies network
- Big in Biopharma
- Clinical excellence



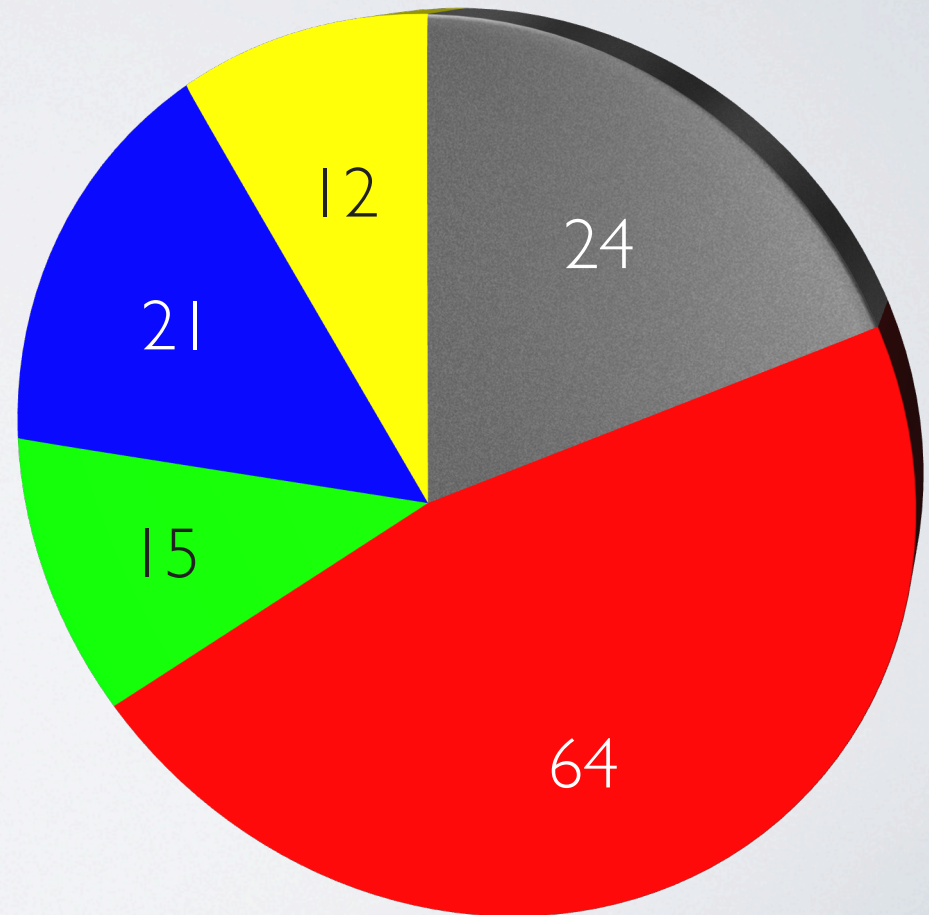
INNOVATIVE RESEARCH

- High quality universities
- Excellent research institutes, focus on life sciences
 - VIB [world class biotech research]
 - IMEC [focus on nanotechnology]
 - CMI [translational medicine]



143 BIOTECH COMPANIES

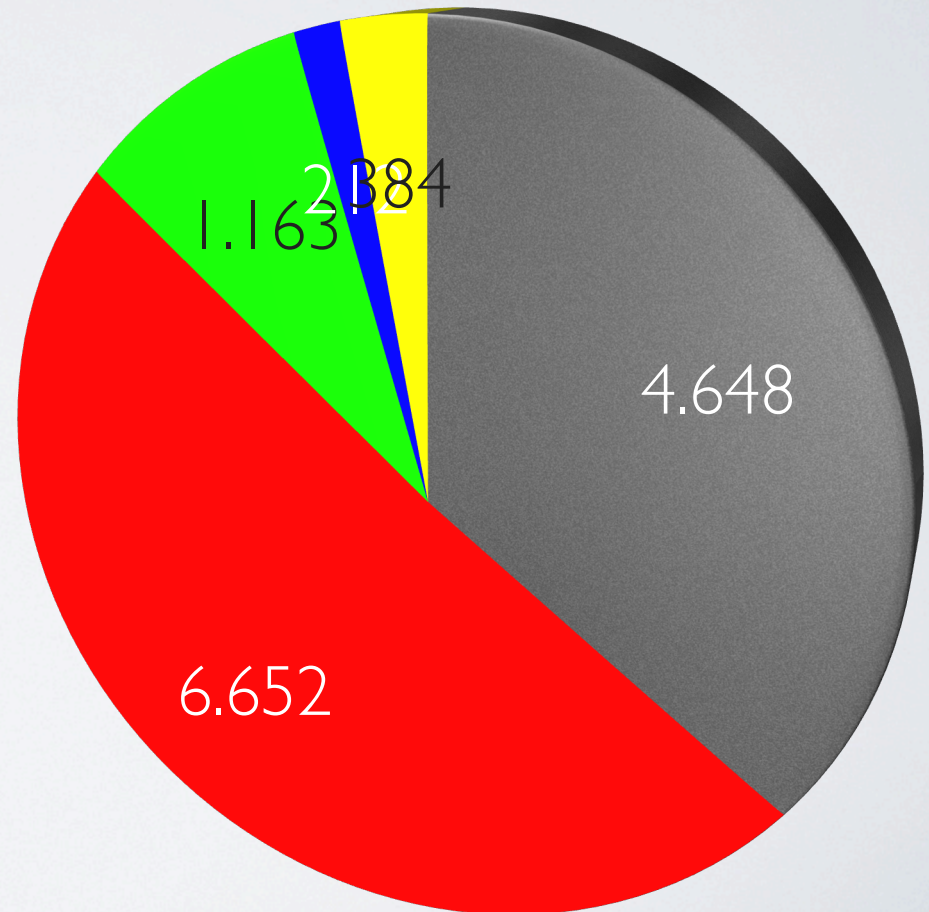
- Ind. Products
- Health care
- Agro & Food
- R&D provider
- Tech provider



13.000 EMPLOYEES IN R&D

>30.000 in total

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- Health care
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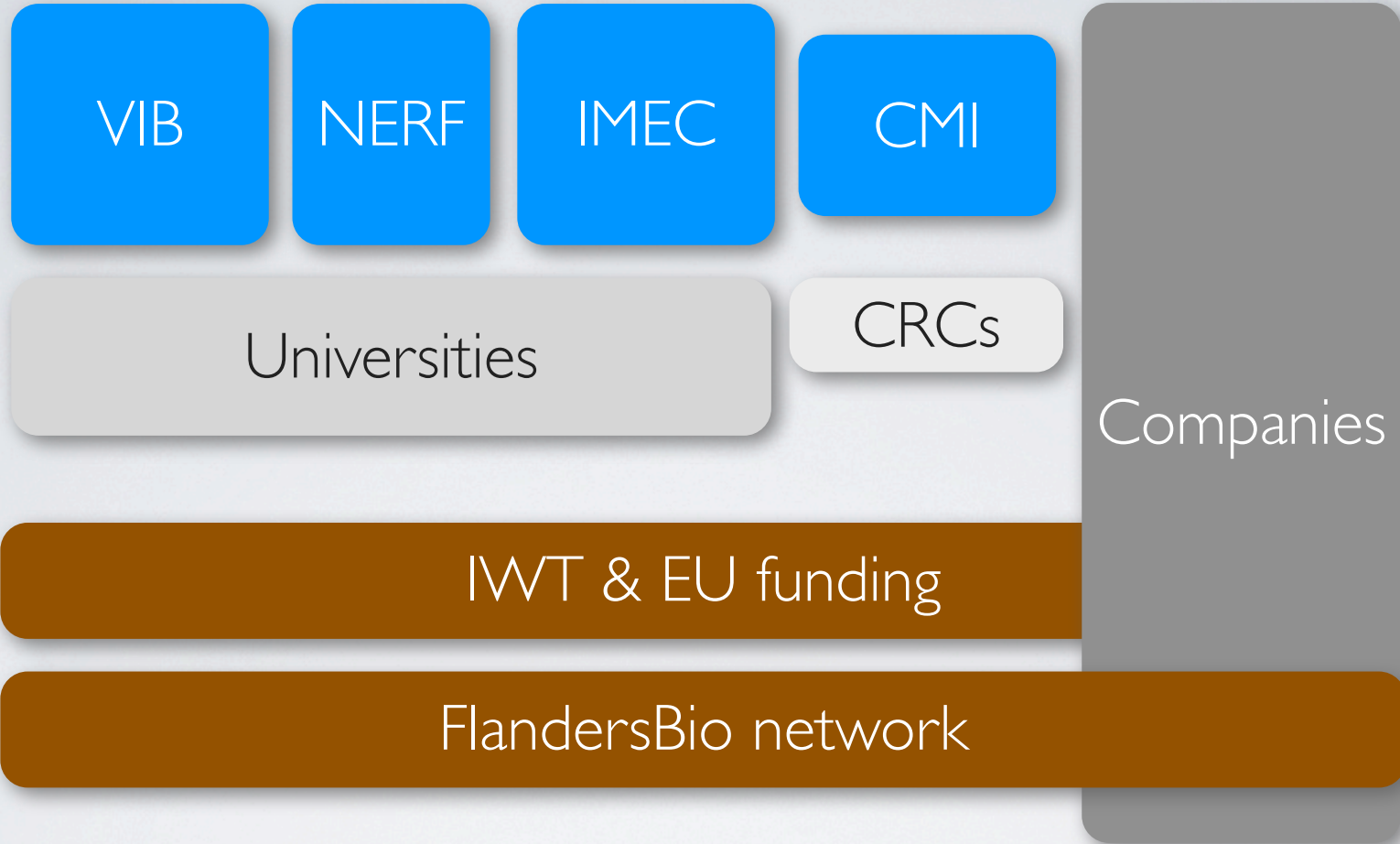
BELGIUM, HOME TO ...

- Pharmaceutical companies
 - 5% of the top-100 drugs are developed in Belgium
 - Per capita the highest number of drugs in development
 - Total production: 5.2 billion euro
 - Total export value: 34 billion euro

CLINICAL EXCELLENCE

- Dense medical network
 - 4 MDs per 1.000 inhabitants (> OECD average 2.9)
- Renowned standard of care
- Excellent equipped hospitals
 - No I in clinical trials





R&D LIFE SCIENCES TRACK

Focus on healthcare

IWT, REGIONAL FUNDING

- Unique in its support and stimulation of Industrial R&D and technology transfer
 - Academic research
 - Industrial basic research, prototype development and mixed research



HIGH LEVEL BIOTECH HUB

2ND IN EUROPE

TOTAL MARKET CAP EURONEXT COMP

- Movetis
- Thrombogenics
- Galapagos
- Ablynx
- Tigenix
- Devgen
- drugs gastro intestinal
- cardio and eye disease
- bone and joint disease
- nanobody platform
- cartilage defects
- agro biotech

MOVETIS

- Development of gastro intestinal drugs
- Resolor; approved in EEA for 'symptomatic treatment of constipation in women, in whom laxatives fail to provide adequate relief'
- 100 M euro IPO in December 2009
- Shire offer; +74% per stock, >65% secured

THROMBOGENICS

- Biopharmaceutical company, developing therapeutics for eye and blood vessel diseases and cancer
- Microplasmin; very positive Phase III results
 - Transformation of the treatment of retinal disorders
 - Resolving vitreomacular adhesion
 - Cure full thickness macular hole, without surgery

GALAPAGOS

- Hybrid biotech company
 - R&D pipeline
 - Small molecule, antibody therapies
 - Rheumatoid arthritis, osteoarthritis and osteoporosis
 - Largest pipeline (4 clinical and >40 preclinical programs)
 - Contract Service

GALAPAGOS

- Buys GSK research centre in Croatia
- Growth of 1/5 up to 800 people

REMYND

- Development of disease modifying treatments against Alzheimer's disease and Parkinson's disease
 - R&D pipeline; 2 blockbusters (2012 in Phase I)
 - CRO
- Roche deal
 - 500 M euro milestone payments

BIOCARTIS

- Molecular diagnostics company, multiplexed detection of molecular based biomarkers
- Founded by Rudi Pauwels



SUCCESSFUL, BUT FRAGILE

KNOWLEDGE BASED ECONOMY?

- Special care is needed for technology driven areas of expertise
- Government support; regional and European
 - Academic research
 - SMEs
 - Drivers of employment and innovation

FLANDERSBIO

building biotech bridges



NETWORK FOR BIOTECH

- To support and facilitate the sector's sustained development
- To ensure that life sciences remain a strong driver of economic growth

STRONG LOCAL NETWORK

- >210 member companies
- Strong political connections
- Connected to universities and research institutes
- Partnerships with pharma companies
- Partnerships with capital providers

INTERNATIONAL CONNECTED

- European network of clusters CEBR
- BioNewJersey, USA
- Osaka Biotech cluster, Japan

SUPPORT INNOVATION AND R&D

- National and international network has proven very valuable
- Support SMEs to set up cross border partnerships
 - R&D
 - Financial partnerships
- Proactive lobbying

NO I IN EUROPE

ANNUAL LIFE SCIENCES CONVENTION

- Knowledge for Growth
- Annual convention and exhibition in May
 - > 900 participants in 2010
 - >90 companies presented at the venue
- May 5, 2011

FLANDERSBIO

www.flandersbio.be

