

EUSKADI

BASQUE COUNTRY

Innovation land

+ More industry ➤ Better industry - Fewer emissions

BIOSPAIN

7-9 October 2025

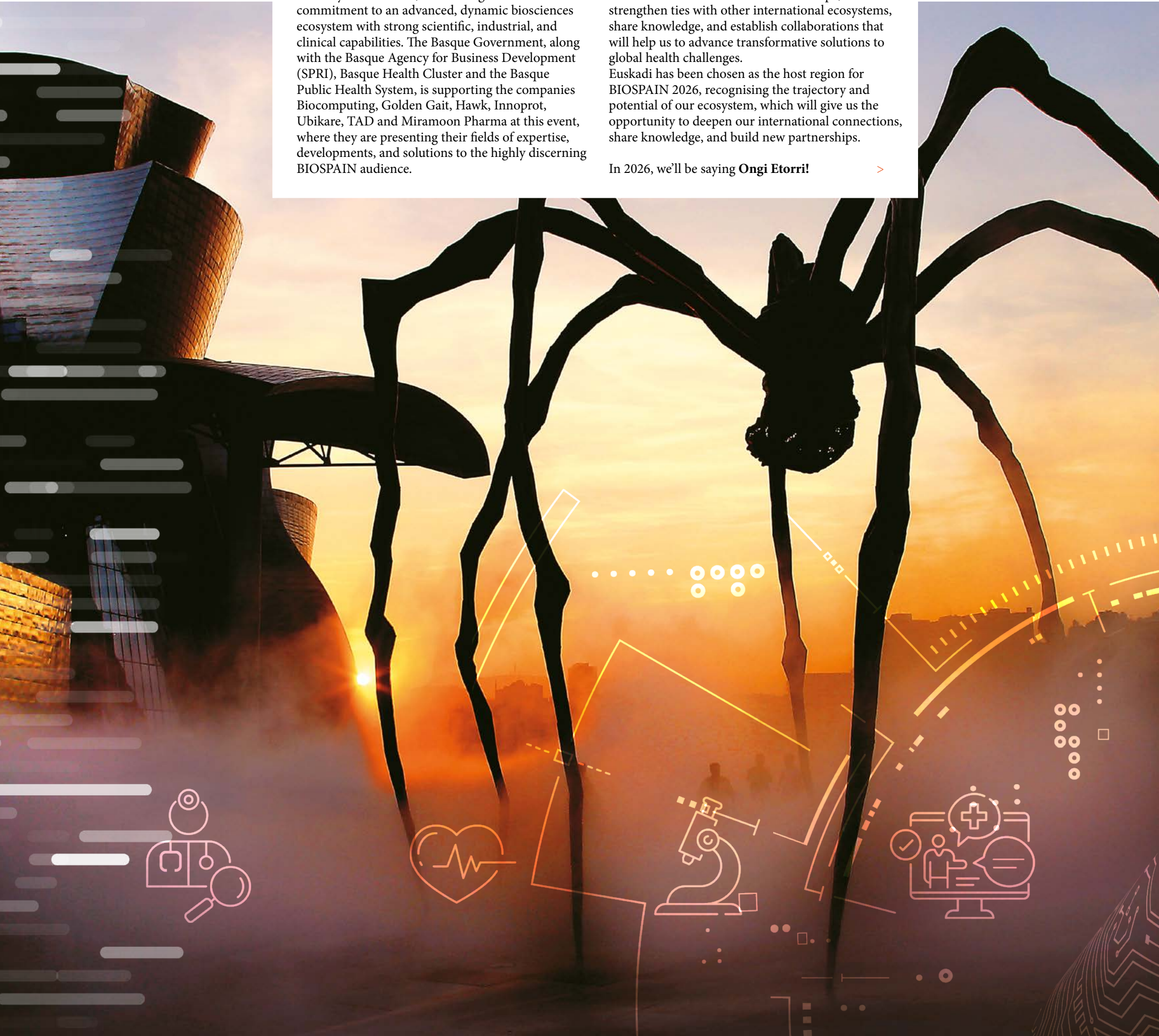
<i>p.2</i> _	<i>p.3</i> _	<i>p.4</i> _	<i>p.5</i> _	<i>p.6-7</i> _	<i>p.8</i> _
Idoia Muñoz. Basque Health Cluster.	Jaione Ganzarain. Basque Government	BRTA Basque Research & Technology Alliance	Basque Technology Park	Basque Public Health System	Companies in the Basque Country booth

Building the Health of the Future

The Euskadi-Basque Country stand has brought together companies and institutions from the Basque Country in Barcelona, showcasing Euskadi's clear commitment to an advanced, dynamic biosciences ecosystem with strong scientific, industrial, and clinical capabilities. The Basque Government, along with the Basque Agency for Business Development (SPRI), Basque Health Cluster and the Basque Public Health System, is supporting the companies Biocomputing, Golden Gait, Hawk, Innoprot, Ubikare, TAD and Miramoon Pharma at this event, where they are presenting their fields of expertise, developments, and solutions to the highly discerning BIOSPAIN audience.

Our joint presence at BIOSPAIN 2025 aims not only to demonstrate the diversity and specialisation of Euskadi's business and research landscape, but also to strengthen ties with other international ecosystems, share knowledge, and establish collaborations that will help us to advance transformative solutions to global health challenges. Euskadi has been chosen as the host region for BIOSPAIN 2026, recognising the trajectory and potential of our ecosystem, which will give us the opportunity to deepen our international connections, share knowledge, and build new partnerships.

In 2026, we'll be saying **Ongi Etorri!** >



IDOIA MUÑOZ LIZÁN

Director, Basque Health Cluster

The Basque Health Ecosystem at BIOSPAIN 2025



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Over recent decades, the biosciences sector in the Basque Country has become one of the driving forces of the regional economy. It is also one of the strategic sectors with the greatest growth potential and transformative capacity, underpinning the country's clear commitment to an industrial future based on knowledge, public-private collaboration, and innovation with social impact.



The Basque Health Cluster plays a central role as a coordinating and catalysing agent of Euskadi's biosciences ecosystem. The cluster works to strengthen the sector's capabilities, promote cooperation among its more than 130 member organisations - including companies, technology centres, hospitals, universities and healthcare-related institutions - and promote the region's value proposition internationally. Our mission is clear: to boost the competitiveness of the health sector in Euskadi and generate economic and social impact through innovation. This is why Basque Health Cluster also focuses on two major challenges in our sector: talent and investment.

Euskadi benefits from a highly qualified talent pool, thanks to a robust education system, a specialised university offering, and a continuous training system that responds to emerging sectoral needs. The region also has a strong financial

tradition supporting industrial development, now reflected in initiatives such as Basquefik, which aims to mobilise public-private capital for innovative projects. We work in close collaboration with all of these stakeholders to foster talent development, facilitate access to finance, and accelerate the sector's growth and internationalisation.

One of the most ambitious examples of our ecosystem is Osasun Poloa, the Basque Country's Health Innovation Hub, conceived as an international benchmark in biosciences. This initiative, driven by the Basque Government and supported by the cluster, seeks to concentrate and coordinate capabilities within an ecosystem of excellence aimed at generating innovative products and services, industrial scaling, and attracting both investment and talent.

Let me take this opportunity to invite you to visit the Euskadi-Basque Country stand, where you will be warmly welcomed.

"OUR MISSION IS CLEAR: TO BOOST THE COMPETITIVENESS OF THE HEALTHCARE SECTOR IN THE BASQUE COUNTRY AND GENERATE ECONOMIC AND SOCIAL IMPACT THROUGH INNOVATION".

JAIONE GANZARAIN

Deputy Minister for Technology,
Innovation and Digital Transformation
of the Basque Government

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Life sciences and biotechnology are playing an increasingly important role in Europe, as evidenced by the Letta and Draghi reports, the European Commission's programme, and its "Competitiveness Compass for the European Union". **Jaione Ganzarain, Deputy Minister for Technology, Innovation and Digital Transformation of the Basque Government**, shares her views on the current state of the biosciences industry and the main policies supporting its development.

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The Basque Country is one of the high innovation regions - the European Commission considers the Basque Country a "pole of excellence" - and maintains an investment in R&D of around 2.2% of GDP (2023), close to the European average. It also has a great industrial tradition, supported for decades by sustained investment in R&D and innovation. And recently it's adopted a new Industrial Plan - Euskadi 2030 - to reinforce its industrial profile. What role does the biosciences industry play in this Plan? What does the new Plan mean for its growth?

Since the early 2000s, the Basque Country has maintained a sustained commitment to the health sector and to a life sciences industry that contributes significantly to the Basque economy. This industry is still young by international standards, but it already comprises around 300 companies contributing over €1.1 billion and generating more than 5,300 direct jobs. It is a dynamic, growing, and diversified sector, open to the

world, based on R&D&I, and with a significant socio-economic impact. We are aligned with the European reindustrialisation strategy and the recognition of the geostrategic importance of the healthcare sector, and we share the need to reduce external dependency across the entire biosciences value chain. For this reason, our Plan recognises the biosciences industry as a sector of the future. And to support it, we will have the so-called Transformational Projects, which are strategic levers of public-private collaboration and in which the clusters will play a critical role in their identification and development, to ensure the greatest impact on the sector.

What types of companies make up the Basque biosciences industry? What are its main strengths?

The industry includes two main segments: biopharmaceuticals and medical devices - the latter encompassing *in vitro* diagnostics and digital health - with recognised players in several specialised fields. Focusing on biotechnology and biopharma, we are a hub for production and biomanufacturing, with significant assets in advanced therapies. We have several strong companies working in drug discovery, particularly in areas such as oncology and neurodegenerative diseases, as well as in *in vitro* diagnostics and the application of artificial intelligence to support clinical decision-making.

We also differentiate between manufacturers and suppliers across the supply and service chain. The convergence of

biotechnology with data science, computing, engineering, and manufacturing is essential to securing key elements of the value chain. The sum of companies with a long history, such as pharmaceutical companies, plus new companies that emerge both from the scientific-technological community and through diversification processes, and suppliers form a fabric that is part of an innovation ecosystem which, we believe, provides essential support.

"OUR PLAN RECOGNIZES THE BIOSCIENCES INDUSTRY AS A SECTOR WITH A PROMISING FUTURE. AND TO SUPPORT IT, WE WILL HAVE WHAT ARE KNOWN AS TRANSFORMATIONAL PROJECTS, WHICH ARE STRATEGIC LEVERS FOR PUBLIC-PRIVATE COLLABORATION."

J. GANZARAIN



Every industry needs a foundation for growth - what underpins the Basque bioindustry?

If I had to sum it up in one phrase: public-private collaboration at all levels, from strategy design to the execution of initiatives and programmes. Focusing on the key elements for the biosciences industry, first we have a powerful Basque Network of Science, Technology and Innovation Agents, with excellent groups and internationally recognised centres.

The Basque Government continues to support R&D, which we see as the cornerstone for tackling radical transformation. We have committed to increasing the annual R&D budget by at least 6%, with the goal of reaching 3% of GDP by 2030.

The scientific and technological community creates value, which is captured through spin-offs or transferred to the business sector. To support this, we

have a network of science and technology parks, incubators, accelerators, investors, and dedicated instruments that foster the creation and growth of new companies. One such example is the Basque Tek Ventures initiative, which aims to accelerate the commercialisation of the most promising technologies through a structured path for creating and accelerating deep tech startups. Around 50% of the projects supported or in development fall within the health sector.

Finally, I would like to refer to an essential asset for the development of this industry, the Basque public healthcare system. It is a crucial element due to the diversity of roles it plays in the ecosystem: researcher, entrepreneur, co-developer of products and services, prescriber, buyer and user, as well as custodian of our data, which are key to the disruptive innovation we are going to need to gain competitiveness.

Research and Innovation in the Basque Public.

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The Basque Research and Technology Alliance (BRTA) is a collaborative network of 17 R&D centers in the Basque Country, bringing together over 4,000 researchers — more than 700 of whom are actively engaged in health-related projects. BRTA integrates both Technological Centers, focused on applied industrial R&D, and Cooperative Research Centers (CICs), dedicated to high-impact scientific research. This diversity enables BRTA to connect science and technology, offering comprehensive solutions to incoming complex needs by healthcare systems, ranging from robust capabilities for early-stage biomarker discovery and advanced manufacturing, to increasingly digital patient-centric diagnostics and clinical validation systems, naturally building up from basic research to translational science.

In the health domain, BRTA addresses critical challenges facing healthcare systems today, including the demographic shift toward ageing, the growing burden of chronic diseases, and the need for digital and technological transformation. Its approach is grounded in personalised, preventive, and precision healthcare, supported by multidisciplinary expertise in biology, engineering, data science, and materials.

BRTA's health-related capabilities span:

- Multi-Omic infrastructure and integration coupled with systems biology approaches for early-stage biomarker discovery and disease modeling.



- Biomaterials and bioprinting for regenerative medicine and tissue engineering.
- Point-of-care diagnostics with lab-on-a-chip and biosensor platforms.
- Nanomedicine for controlled drug design and delivery and theranostics.
- Synthetic biology for medical and biotechnological applications
- AI-driven clinical decision support, remote monitoring, and digital therapeutics.
- Medical robotics and neuroengineering for rehabilitation and intervention.

This scientific and technological development relies on access to specialised infrastructures, which are essential for innovation in health. BRTA members operate cutting-edge facilities such as high-field NMR and omics platforms (CIC bioGUNE), molecular imaging units (CIC biomaGUNE), nanomaterials labs (CIC nanoGUNE), robotics and biosensing testbeds (TECNALIA), AI and imaging technology labs (Vicomtech), and nanomedicine development platforms (CIDETEC).

These capabilities are further illustrated through the strengths of BRTA centres devoted to Health. For example:

- CIC bioGUNE leads in disease-oriented chemical, molecular, cell, and synthetic biology, capitalizing on a multi-omic suite to translate molecular signals into precision markers for personalized medicine research.

- CIC biomaGUNE specialises in molecular imaging and biofunctional nanomaterials, hosting one of Spain's leading imaging infrastructures.
- CIC nanoGUNE brings innovation in tissue engineering, Alzheimer diagnostics, and antimicrobial coatings using nanotechnologies.
- Tecnalia develops neurotechnology, medical robotics, digital health platforms, and biosensing systems.
- Vicomtech delivers AI-powered decision support, medical imaging, and digital therapeutics for predictive and personalized care.
- Cidetec advances nanomedicine, bioactive coatings, and smart drug delivery systems, especially in oncology and gene therapy.
- Tekniker focuses on certified medical devices, assistive robotics, wearables, and automation for health applications.
- Gaiker offers NAMs for efficacy and safety testing, 3D in vitro models, and POC diagnostics, with focus on oncology and regenerative medicine.
- Leartiker contributes 3D bioprinting, injectable biomaterials, and organ-on-chip platforms for tissue engineering and diagnostics.

BRTA's collective health R&D strategy is framed by a shared Health Agenda, targeting priorities such as:

- Active and healthy ageing and multimorbidity management.
- Secure, ethical, and interoperable use of clinical data and biological samples.



BRTA
BASQUE RESEARCH
& TECHNOLOGY
ALLIANCE

- Clinical validation and regulatory readiness of new technologies.
- Multidisciplinary workforce training and capacity building.
- Industrial scale-up and go-to-market strategies for innovative solutions.
- Creation of a multiomic data space for integrative or federated work.
- "Disease pathway" vision that cut across cancer, chronic, and infectious disorders, with expertise in translating mechanism to patient centred interventions.

Collaboration is a core principle. BRTA works closely with hospitals, universities, and companies through initiatives like the Basque Health Cluster and the Innosasun program. These collaborations foster agile innovation and help accelerate the translation of science into clinical and commercial impact.

With its integrated structure and commitment to real-world health challenges, BRTA reinforces the Basque Country's position as a hub of biomedical and technological innovation with both regional and global relevance.

The Basque Technology Park: A Hub for Health Innovation and Technology

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The Basque Technology Park is one of Europe's leading centres for the manufacturing of advanced therapies. It is also notable for its application of artificial intelligence to improve diagnoses and treatments, the development of personalised health technologies, and the promotion of biotechnology and research into new treatments and therapies. Collaborative work between businesses, research centres and universities is enabling the development of new medical technologies and treatments, positioning Euskadi at the forefront of innovation and offering increasingly effective solutions to improve public health.

Key Figures for the Health Sector at the Basque Technology Park Data shows that 19% of the 673 entities based at the Basque Technology Park operate in the health sector. In terms of employment, 3,078 people, 13% of the Park's total workforce of 23,674, are employed by companies, start-ups, and technology and research centres in the sector.

By region, the campuses located in Bizkaia bring together 53 companies from the health ecosystem, employing 1,256 people in this field. Notably, this territory hosts benchmark facilities for the sector, such as Achúcarro's Human Cell Biomodels Platform, CIC bioGUNE's proteomics platform, and FBB – Fundación Biofísica Bizkaia's platforms for molecular and cellular imaging, protein structure, and biophysical systems. In terms of R&D infrastructure, Bizkaia is also home to several reference laboratories within centres such as Tecnalia Research & Innovation, IBF – Institute of Biophysics, Gaiker, and the public health regulatory laboratory of the Basque Government's Department of Health.

In the case of Gipuzkoa, the growth and positioning of the health sector is particularly noteworthy, with a portfolio of companies and projects that already place this territory at the forefront in Europe. The Donostia

and Hernani campuses host 50 organisations, with 1,165 jobs in companies and research centres in the health sector. The catalogue of platforms, infrastructures and health-related companies located in this territory is diverse, expanding, and increasingly influential. For example, CIC biomaGUNE has a distributed biomedical imaging network, as well as mass spectrometry and Molecular and Functional Imaging platforms, while the Biogipuzkoa Health Research Institute provides its Animal Facility and Experimental Surgery Unit, Clinical Trials Platform and Histology Platform. These assets are complemented by those offered by BCBL (Basque Center on Cognition, Brain and Language), CEIT, CITA Alzheimer, Tecnalia Research & Innovation, Vicomtech, and the Basque Culinary Center.

In Araba, on the Vitoria-Gasteiz Campus, 42 organisations specialise in the health sector, generating 604 jobs. This territory is home to key infrastructures such as the GMP pharmaceutical development laboratory Basque Pharmed Labs (Tecnalia R&I), as well as Neiker's laboratories in food safety, animal testing, microbiology and immunology, analytical chemistry and molecular biology.

Altogether, companies within the health ecosystem of the Basque Technology Park play a fundamental role in research, development and innovation. Thanks to their work, and to that of academic institutions and research centres with which

they collaborate to develop advanced solutions in medicine and medical technology, the Basque Technology Park has become a centre of excellence in the health sector, contributing to scientific progress and improving people's quality of life.

The Basque Country Technology Park is the space where innovation and talent come together in an avant-garde, green and sustainable environment to promote the development of projects and professionals. Spread across six active campuses throughout the Basque Country, it is a rich ecosystem of innovation with more than 23,670 professionals (around 10% of whom have PhDs) from 673 entities of all kinds, including start-ups, companies, science and technology institutions, innovation support agents, and public entities. The biohealth sector is one of the most represented.

Parke

EUSKADIKO
PARKE
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Research and Innovation in the Basque Public Health System.

Euskadi: A Leader in Healthcare Innovation

Euskadi's commitment to integrated, digitalised and results-oriented healthcare research is yielding clear results. Its collaborative model, intelligent use of data, promotion of personalised medicine and advanced therapies, focus on value-based healthcare, and close ties to the business ecosystem have positioned the Basque system as a leader in the future of health.

Collaborative Innovation: The Key to Transforming the System

The Basque system is committed to collaborative and dynamic research that is directly connected to the local health ecosystem, encompassing scientific, technological and business actors.

This synergy, particularly with the business sector, is essential to ensuring that research outcomes reach the market and directly benefit people.

Thanks to this strategy, Euskadi is developing projects that incorporate emerging technologies such as artificial intelligence, virtual and augmented reality, additive manufacturing, and collaborative robotics, among others.

To foster these partnerships, the health research institutes have innovation support units that work in coordination with BIOEF, linking the healthcare system with companies to validate and develop new health technologies.

An Advanced Network Connecting Science, Technology and Wellbeing

The Basque Public Health System has placed research and innovation at the core of its strategy to transform healthcare. Its aim is clear: to improve population health through more advanced, personalised, and efficient care.

This commitment is built on a strong network of Health Research Institutes: Bioaraba, Biobizkaia, Biogipuzkoa and Biosistemak.

Coordinated by the Basque Foundation for Health Research and Innovation (BIOEF), this network works closely with Osakidetza, the Department of Health, and the University of the Basque Country (EHU), which acts as a strategic partner.

A Scientific Network in Constant Growth

Research activity has grown steadily in recent years. Today, nearly 3,000 researchers - 67% of whom are women - take part in more than 1,700 projects and clinical studies each year, engaging in scientific networks at local, national and international levels.

Among the international collaborations are the Partnership for the Transformation of Health and Care Systems (THCS), the European Partnership for Personalised Medicine (EP PerMed), and the network of European Regional and Local Health Authorities (EUREGHA).

Almost 50% of the funding comes from competitive sources and focuses on priority areas such as oncology and neurology, which together account for 43% of all projects.



Genomics, Immunotherapy and Data: Pillars of a More Precise, Value-Based Medicine

Among the priority areas is the promotion of personalised medicine, particularly in fields such as genomic medicine and advanced therapies.

Another area of focus is research into value-based medicine, which aims to enhance healthcare by incorporating the patient perspective in relation to cost, with the goal of optimising care processes and ensuring the sustainability of the healthcare system.

This shift towards a more precise and value-based approach is closely linked to digital transformation. Euskadi has a single, integrated electronic health record system that centralises each patient's medical information and is accessible at all levels of care, a key element in the intelligent use of clinical data.



The Basque Biobank: a strategic platform for biomedical research

The Basque Biobank, present in all major Osakidetza hospitals and integrated into the health research institutes, it manages and processes biological samples and associated clinical data for scientific purposes, in line with strict quality and legal standards.

Structured as a network with a single contact point via BIOEF, the Biobank currently offers:

- > Over 1,013,575 biological samples,
- > 111,000 donors with various pathologies,
- > and 704,168 samples from the neonatal screening programme.

Medtech Initiative: Supporting Innovation from Basque SMEs

Collaboration with the business sector is further reinforced through Medtech, an initiative promoted by the Department of Health to support projects developed by Basque SMEs in collaboration with the health research institutes.

Launched in 2018 with 15 initial projects from 13 companies, Medtech has, over the past six years, funded 227 projects from 93 companies - a testament to the sector's parallel growth with the broader health ecosystem in Euskadi.

Technology Portfolio and Intellectual Property: Science with Real-World Impact

The technological portfolio of the Basque Health System includes more than 80 developments (medical devices, diagnostic kits, new therapies and software/ICT health) protected with more than 48 families of patents, utility models and industrial designs. Of the total assets, 30% have a commercial exploitation agreement, including two spin-offs arising from the healthcare system itself.

The Technology Offer Catalogue can be consulted to find detailed information on developments that require collaboration to advance through the valorisation and transfer phases.

AGENDA – PITCHES

Pavillion 1, Fira de Barcelona

Tuesday, 7 October at 12:15
MIRAMOON PHARMA

Track Finance & Investment,
section: Oncology &
Neurodegeneration.

Ramón y Cajal Room

Tuesday, 7 October at 15:00
UBIKARE

Track Finance & Investment,
section: Medtech. Digital Health
& AI.

Ramón y Cajal Room

Wednesday, 8 October at 15:15
ROUND TABLE

Biotech Made in Euskadi:
Collaborative Science for
Global Health.
How an agile, collaborative,
and ambitious ecosystem is
driving therapies, technological
platforms, and disruptive models
from Euskadi to the world.

Severo Ochoa Room



BIOCOMPUTING

At BioComputing, we accelerate research in life sciences and industry by integrating computational methods into biological and engineering workflows. Our multidisciplinary team combines expertise in molecular dynamics, machine learning, deep learning, and data science to solve complex scientific challenges.



GOLDEN GAIT BIOTECH

Golden Gait Biotech is developing a drug to overcome movement problems suffered by Parkinson patients. The biggest problems are Falls that can result in severe injuries or even death. This causes Parkinson patients to live with a constant fear, robbing them their daily life. In 60 patients, our drug reduced both Falls and Freezing-of-Gait by over 40%.



HAWK

HAWK Biosystems is redefining spatial proteomics with QF-Pro® — the first and only technology that can truly quantify protein function in tissues. Our patented platform enables simultaneous visualisation and measurement of protein functions with unmatched precision, offering deep insights into protein interplay and dynamics. QF-Pro® uniquely quantifies functional proteomic events at nanoscopic resolution.



INNOPROT

Innoprot is a biotechnology company with a primary focus on advancing cell-based assays and technologies tailored for drug discovery. Our proprietary platforms include Nomad Biosensors, enabling high-throughput multiplexed screening of G Protein-Coupled Receptors (GPCRs). We have also developed in vitro models that faithfully replicate key cellular pathways involved in major neurodegenerative diseases such as Parkinson's, Alzheimer's, and Amyotrophic Lateral Sclerosis (ALS).



TAD

TAD | THE ART OF DISCOVERY, provides unique reliable, scientifically rigorous, and adaptative *in vivo* evaluation services to the pharmaceutical industry and academics in all phases of drug discovery. TAD has managed to eliminate deviations between animal and human results in evaluations, combining *in vivo* industrial quality assays with cutting-edge mathematical modelling to deliver robust and translational insights.



MIRAMOON PHARMA

Miramoon Pharma has developed a proprietary platform to generate small molecules with neuroprotective properties aimed at halting tissue degeneration. Our lead candidate, MP-004, has shown promising results in inherited retinal disorders such as retinitis pigmentosa. Topical administration preserved up to 70% of photoreceptor activity and significantly reduced photoreceptor cell death in murine models.



UBIKARE

Ubikare aims to democratise health, impacting people's quality of life and supporting healthcare professionals and clinical research. The core of NAIHA, its software, is an AI engine based on data processing and automatic rules, which supports evidence-based decision making.



BIOEF

The Basque Foundation for Health Research and Innovation is the instrument of the Department of Health of the Basque Government to promote and coordinate R&D&I in the Basque health system, in a framework of collaboration between the different sectors at regional, state or international level. It acts as the corporate head of the four Health Research Institutes (IIS) and is responsible, among others, for the management of key infrastructures such as the OTC and the Basque Biobank, as well as the management of R&D&I grants and the coordination of collaboration with the business sector.



Bioaraba

Bioaraba is the leading Health Research Institute in Álava. Its model combines translational research, innovation, and knowledge transfer, focusing on improving clinical practice and population health. It operates across seven priority areas, with over 400 professionals in 41 multidisciplinary groups.



Biogipuzkoa

Biogipuzkoa is the leading Health Research Institute in Gipuzkoa and is accredited by the Instituto de Salud Carlos III (ISCIII). It comprises 32 research groups in seven scientific areas, with over 500 professionals. Its model connects science, innovation and health, with a clear focus on improving healthcare and positively impacting population health and the regional economy.



Biobizkaia

Biobizkaia is a leading Health Research Institute accredited by the Instituto de Salud Carlos III (ISCIII). It is a top-tier scientific institution in Bizkaia, driving translational research and healthcare innovation to create value and improve health and quality of life.



Biosistemak

The Biosistemak Institute conducts applied research on the organisation and management of health and social care systems. Its research focuses on four main areas: public policy evaluation, decision-making support, new organisational models, and the analysis of processes and outcomes.