The Walloon Clustering Policy

The Walloon clustering policy is organized in two structures: the Business Clusters and the Competitive Clusters. Business Clusters, created in the 2000s, are based on a bottom-up approach: companies gathered around a sector in order to boost their economic activity and promote business partnerships. There are currently seven clusters: CAP Construction, Eco-Construction, EquisFair, ICT Cluster Infopole, Plastiwin, TWEED and TWIST. The six Walloon Competitive Clusters were created at the initiative of the Walloon Government on the basis of a study of the leading sectors in Wallonia. Their mission is to initiate innovative projects resulting from the synergy between companies, universities, and research centers and centers of competence. Research and innovation are supported as a lever for competitiveness and therefore for growth. The six priority sectors led to the creation of BioWin, GreenWin, Logistics in Wallonia, MecaTech, Skywin and Wagralim.

Whereas Business Clusters are funded to develop economic animation, Competitive Clusters are mainly supported to carry out investment, research and development or training projects in line with their own strategy, with a view to valorization, particularly at the international level.

Business Clusters and Competitive Clusters therefore play complementary roles in the Region’s economic landscape, favoring innovative partnerships, whether industrial, commercial or technological. Their action is part of an international development objective and of a support to the participation of their members in the various European programs. Business Clusters and Competitive Clusters are also developing a strategy to support the digitization of their members.

The Clustering policy is an integral part of Wallonia’s Intelligent Specialization Strategy.

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BIOWIN IS THE HEALTH COMPETITIVE CLUSTER OF WALLONIA (SOUTH BELGIUM). ITS ROLE IS TO BRING TOGETHER ALL THE WALLOON STAKEHOLDERS PARTICIPATING IN INNOVATIVE PROJECTS AND/OR TRAINING IN THE FIELDS OF HEALTH BIOTECHNOLOGY AND MEDICAL TECHNOLOGIES.

ITS AIMS ARE

- Support for the emergence / development of R&I projects
- Skills development
- International positioning and business development
- Support to business growth

BIOWIN MEMBERS (2018)

BioWin gathers 237 members, among which:

- 196 companies (11 large and 185 SME’s),
- 5 universities
- 12 higher education schools
- 5 research centres
- 19 organizations (foundations, training centres, incubators…)

BioWin members are primarily focusing on six strategic domains: (Bio)pharmacy, Cell Therapy, Radiations applied to health, Medical Devices & In Vitro diagnostics, Biomanufacturing and Data Science.

FIGURES FOR THE SECTOR (2018)

- 20,000 hospital beds
- European leader in clinical trial phase I
- EUR 1.2 billion private R&D investment
- EUR 1,842 billion accumulated private capital raised by BioWin Walloon SME members (2005-2018)
GREENWIN IS THE WALLOON INNOVATION CLUSTER DEDICATED TO GREEN CHEMISTRY, INNOVATIVE AND SUSTAINABLE CONSTRUCTION AND BUILDING MATERIALS, ENVIRONMENTAL TECHNOLOGIES & CLEANTECH.

GREENWIN: BOOSTING ENVIRONMENTAL INNOVATIONS

As an innovation accelerator, the GreenWin cluster supports innovation, fostering the development of collaborative research and development (R & D) and investment or training projects, in order to stimulate business growth and job creation in buoyant markets. By working at bringing more efficient environmental technologies to market, GreenWin is focusing on improving the product lifecycle through leaner material and energy usage, recycling, and the use of renewable resources. It also encourages broader environmental management and remediation.

FIELDS OF ACTIVITIES & TARGET MARKETS

1. Sustainable chemistry
2. Sustainable construction and building materials
3. Cleantech

In particular, the GreenWin cluster focuses its efforts on promising issues such as bio-based chemistry, white biotechnologies, energy storage and management, eco-neighbourhoods, sustainable renovation, the management and sanitation of soil and water, recovery and treatment of sewage sludge, and the recycling of waste.

A DYNAMIC NETWORK OF 200 MEMBERS

GreenWin brings together, within a single network, around 200 members (140 of which are companies -75% of them SMEs- that include several world leaders), universities and colleges, 140 university departments, 17 industrial research centres, 5 training operators, 31 specific training options and about 100 educational programmes.

OTHER FACTS & FIGURES

In terms of results, the cluster also means 42 projects (4 of them European), partly funded by Wallonia for a total budget of over € 110 million.
LOGISTICS IN WALLONIA IS THE COMPETITIVE CLUSTER FOR THE TRANSPORT, LOGISTICS AND MOBILITY SECTOR IN WALLONIA.

SCOPE
Transport, logistics and mobility activities are present on a transversally basis in a countless number of enterprises. Logistics in Wallonia therefore focuses on the major transport and logistics enterprises, on industrial shippers transporting volumes and the major regional or European distribution centers. The indirect scope is composed of the sector suppliers and the training and research bodies that are active in the sector.

MARKET AND MARKET NICHES
Logistics in Wallonia is primarily intended to transport and logistics operators whatever the mode of transport: road, rail, waterway or air. Its members are active in one or several of these transport modes. In addition, the cluster focuses also on industrial shippers from sectors such as food, healthcare, retail...

MEMBERS OF LOGISTICS IN WALLONIA
The cluster has some 300 members.
- Transport and logistics enterprises, all transport modes: TNT, Vincent Logistics, Jost Group, Sedis Logistics...
- Industrial shippers of different sectors: Total, Johnson & Johnson, Baxter, ArcelorMittal, Prayon...
- Infrastructure managers: Liege Airport, the Walloon autonomous ports, Baxter Distribution Center Europe, Idea, the SPI...
- Suppliers and component manufacturers: Alstom Transport, Meuse & Sambre, Zetes, Etilux...
- Training operators: High Schools, Forem Logistique, Randstad...
- Research operators: Universities, Multitel, the CETIC, the Road Research Centre...

ACTIONS
The cluster aims at boosting innovation in the sector, stimulating networking and support to enterprises and promoting Wallonia abroad to attract new investors and new activities.
MECATECH IS THE COMPETITIVE CLUSTER FOR MECHANICAL ENGINEERING.

MISSIONS

- To boost activity and employment by engineering and conducting projects of international dimension that rely on networks which combine large companies, SMEs, universities, and research and skills centres.
- To be a driving force for the mechanical engineering sector as a whole.

SCOPE

Mechanical Engineering provides customers with innovative functional systems (machines, industrial or consumer equipment, as well as processes). It calls upon a large range of technologies among which 4 strategic axes are prevailing:

- Materials and surfaces of the future: integration of new properties/features into materials (new materials and surface treatment);
- Comprehensive technologies: fast, complex and thrifty shaping of materials;
- Microtechnologies and mechatronics: integration of smart features into systems;
- Intelligent maintenance and Manufacturing: integration of new technologies in support of production and maintenance (sensors, measurements, expert systems…).

MECATECH MEMBERS

This hybridation of technologies (from pure mechanics to mechatronics, chemistry, nanomaterials, organic matter, biomimetics, …) and cross-applications make the networking of operators essential. Our projects implement strong technological, scientific and industrial skills in Wallonia as regards full-line suppliers/integrators, technological enterprises and research stakeholders (universities, high schools and research centres).

MECATECH HAS 290 MEMBERS - OUTCOMES OF THE 23 CALLS FOR PROJECTS

73 research projects, 13 investment projects, 22 training projects, and 4 technology platforms:

- 47 large companies (participating in projects a total of 98 times)
- 140 SMEs (185)
- 78 academic labs (164)
- 18 approved research centres (75)
- 5 high schools (10)
- 3 training centres (22).
SKYWIN WALLONIA IS THE AEROSPACE COMPETITIVE CLUSTER OF WALLONIA.

MARKET AND MARKET NIChes
The Skywin pole is defined around 5 sectors and 6 technological axes. The 5 economic sectors covered by the cluster have their own different business models justifying specific approach

- **Civil Aeronautics** and **Space**, integrates the members of the existing EWA and Wallonie Espace clusters.
- The **Drone** sector is still consolidating, focussing on the development of new flying machines, sensors, control and applied software, and also on the possible synergies with the space sector, especially for earth observation.
- The **Defense** sector bases on the awareness of a European defense need and the recent appearance of European and Federal research programs dedicated.
- The **Engineering** sector is dedicated to the various service providers needed for the technological development of the other 4 sectors, including software developers.
- The **Composite materials and industrial processes** sector; the Walloon aerospace industry is focusing on materials of the future, both for design and manufacturing;
- The **Metallic materials and industrial processes** sector; the integration of operational excellence and Additive Manufacturing into the industrial process are major challenges for the sector;
- The **Embedded systems** sector; for aeronautical, space and drone uses;
- The **Airport services** sector; the number of airports will continue to grow, with new operational and technical opportunities of management of these infrastructures.
- The **Space and drones applications and systems** sector; the global market for nano and micro-satellites (new space concept) is growing; the availability and the combination of data derived from space observation and the use of drones involve the development of plenty new applications;
- The **Modelling and simulation** sector; the Walloon industrial and scientific sector contains some SME leaders in this specific international market.

MEMBERS OF SKYWIN
Skywin has 148 members among which:

- 115 Companies: SMEs (84) and large companies (31);
- 25 Research operators;
- 2 Training centres;
- 6 Other bodies (agency, association,...).

FIGURES FOR THE SECTOR IN WALLONIA
Turnover of the sector: €1.75 billion  
Employment figures: 7,500 direct jobs

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Wallonia Clusters
OBJECTIVES
Wagralim is a competitiveness cluster allowing to accelerate the growth of companies active in the agrifood industry in Wallonia. It brings together economic operators, scientists and training centres to reach a critical size in its field.
It provides its members with several services:
- networking at national and international levels (search for partners, ingredients, equipment, …)
- support in your innovation projects and applications for investment
- scientific and technological support in adapting and improving your products
- training and inspiration on trends and developments in the sector

MARKET AND MARKET NICHEs
Wagralim strategy focuses on priority development fields:
- Axes 1 - Health and Nutrition – relates to the design, development and assessment of products or ingredients with proven health benefits and/or responding to an improved nutritional quality.
- Axes 2 - Industrial efficiency – aims to improve manufacturing processes and methods of food preservation, particularly through organizational innovation by working on the methods of industrial management (production, quality, safety, skills).
- Axes 3 - Development of sustainable agro-industry networks – aims to optimize the production process and the by-products, in order to increase the added value, reduce the costs or enhance the sustainable and responsible nature of an activity.

WAGRALIM MEMBERS
Wagralim has 180 members among which:
- 80 % agrifood enterprises, 10% research or training centres ; 10% service or equipment companies,
- 46 innovation projects

FIGURES FOR THE SECTOR IN WALLONIA (ESTIMATE)
Turnover of the sector : € 8.6 billion
CAP CONSTRUCTION BRINGS TOGETHER ANY TYPE OF PROFESSIONAL STAKEHOLDERS IN THE CONSTRUCTION SECTOR. TOGETHER, MEMBERS COLLABORATE TO PROMOTE SUSTAINABLE CONSTRUCTION, ACQUIRE NEW SKILLS AND DEVELOP THEIR BUSINESS.

OBJECTIVES, ACTIVITIES AND PRIORITY THEMES

CAP Construction brings together architects, engineering offices, contractors, installers, producers & suppliers of materials and equipment, real estate developers, research and training centres, experts, inter-municipal associations, federations, etc.

The objective of the cluster is to promote the economic development of the sustainable building sector. To achieve this, CAP Construction has set two strategic axes:

- The acquisition of skills of the operators of the sector
- The emergence of projects

And this through numerous actions: events, working groups, visits, exchanges of good practices, research and innovation projects, collaborative projects, promotion of our Walloon skills abroad, fairs and exhibitions, etc.

In 2019 and 2020, the cluster focused will focus on 7 priority themes:

- Energy efficiency,
- Well-being and health & comfort,
- Silver economy,
- Smart building,
- Smart district/city & eco-district,
- Innovation & new technologies,
- Circular economy & life cycle of materials.

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THE ECO-CONSTRUCTION CLUSTER IS THE NETWORK FOR COMPANIES, ARCHITECTS, STUDY CENTERS AND ALL PROFESSIONALS THAT INTEGRATE THE PRINCIPLES OF GREEN BUILDING IN THEIR ACTIVITY.

MARKETS AND MARKET NICHES

The Eco-construction Cluster raises awareness, informs, organizes training activities, represents the sector with public authorities, and works for the economic development of eco-construction.

Eco-construction consists in building or renovating while respecting our environment, future generations, health of the building’s inhabitants and workers, and offering maximum comfort, including:

- using **green materials**, made from renewable resources, that consume little energy during the manufacturing process, transport, implementation and recycling;
- using **building techniques** that need skilled and local labor rather than large quantities of energy;
- **smart architectural choices**: integrating bioclimatic principles, ensuring a good thermal insulation of the entire building envelope, ensuring good ventilation and thermal inertia of buildings;
- using **smart energy**: low polluting fuels, resort to renewable energies;
- using **smart equipment**: low-energy lighting and household appliances, efficient and correctly sized heating, rational use and treatment of water.

MEMBERS OF THE ECO-CONSTRUCTION CLUSTER

The Cluster brings together more than 270 professionals, including architects, green building and green renovation companies, manufacturers, green materials suppliers (insulation, paints, coatings, etc.), and also consulting firms and renewable energies companies, research centers and universities, etc.
EQUISFAIR - EQUESTRIAN CLUSTER IN WALLONIA, IN ALL SECTORS.

OBJECTIVES

- Promoting the emergence and development of partnerships is the very nature of the cluster. EquisFair positions itself in order to develop new and professionalize existing networks, intensify marketing, boost own skills and support the key stages of R & D towards market launch.

AREAS OF STRATEGIC DEVELOPMENT

- To structure the equestrian sector in Wallonia and promote activities in favour of interactions.
- To highlight resources and opportunities for development in the Walloon Region.
- To exploit international market opportunities, especially with high added value products.
- To deepen the interactions with the sectors of biotechnology and mechanical engineering to develop and invest in in Vet-Tech projects.
- To develop international collaborations and thus encourage foreign investment in the Walloon Region.

EQUISFAIR MEMBERS

- EquisFair began its activity in February 2019 and has 8 founding companies and 14 active members in various fields: horse feed, feed supplements, breeding, infrastructure design, fencing, health care products, biotechnology, pharmaceuticals, communication, transport, event organization, smartphone applications, … EquisFair also collaborates with schools and universities, equestrian federations and research centers.

FIGURES FOR THE SECTOR IN WALLONIA

- Turnover of the sector: 1 billion € per year
- Employment figures: 6.600 direct and indirect jobs
- 2.200 companies
- 77.233 hectares of farmland necessary (11 % of agricultural area)
- 131.000 horses in Wallonia (403000 in Belgium)

EQUIISFAIR ASBL

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THE INFOPOLE CLUSTER TIC IS THE BUSINESS CLUSTER THAT BRINGS TOGETHER AND UNITES PROFESSIONALS FROM INFORMATION AND COMMUNICATION TECHNOLOGIES (ICT) IN ORDER TO PROMOTE BUSINESS AND INNOVATION THROUGH PARTNERSHIP

MARKET AND MARKET NICHES

Our ambition is to contribute to the implementation of a specific and original response to strengthen synergies and allow operators to better position themselves on the market. Proposed activities and services can be distributed into three categories:

- Visibility and linking (Getting to know and be known);
- Dissemination of projects or business opportunities (Doing more business);
- Support to partnership & innovation (Doing more business together).

Several application areas are the foundation of our actions: Industry 4.0, health (eHealth), intelligent transports, Internet of Things (IoT), Serious Game, Big Data, Open Data, Transmedia, Cyber Security, Web, commerce,…

MEMBERS OF INFOPOLE CLUSTER TIC

The INFOPOLE Cluster TIC has more than 130 members:
90 SMEs · 16 large companies · 19 universities and training and research centres · 5 public partners.

SOME MEMBERS

Audaxis · BizzDev · BEA · Cenaero · CETIC · Computerland · IBM · Microsoft Innovation Center · Multitel · Nokia · NRB · RealDolmen · Skylane Optics · Technord · Thales · Win

FIGURES FOR THE SECTOR IN WALLONIA (ESTIMATE)

- Turnover of the sector: €1.38 billion
- Employment figures: an average of 50 employees

Through its network of more than 130 companies, INFOPOLE can help you find the ideal partner whatever your IT project!

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Wallonia Clusters
PLASTIWIN, THE WALLOON CLUSTER OF PLASTICS INDUSTRY, GATHERS 106 KEY PLAYERS OF POLYMERS & BIOPOLYMERS, ELASTOMERS, COMPOSITES AND SYNTHETIC TEXTILES.

OUR KEY MARKETS
- Packaging
- Construction and building
- Health & Medical: equipment, devices, appliances, machines...
- Transport (railway, automotive…)
- Environment: recovery of recycled materials

OUR TECHNOLOGICAL AREAS
- Recycling and recovery of materials
- Plastics Industry 4.0 (connected objects, encapsulation…)
- Moulds and tools optimisation
- Ecodesign & industrial design
- Composites technologies

PLASTIWIN MEMBERS
- Designers, research centres, engineering offices…
- Raw materials manufacturers and suppliers
- Converters
- Machines, tools and moulds makers
- Recyclers
- Training centres

OUR MISSIONS
- Strengthen the economic, technological and commercial potential of members
- Promote the value chain and networking

OUR ACTIVITIES
- Initiate collaborative projects: research, innovation, industrialization ...
- Promote the «Business Development»: new markets and products, prospecting...
- Improve competitiveness: process optimization and cost reduction
- Highlight the skills of members in Belgium and abroad
THE CLUSTER TWEED (TECHNOLOGY OF WALLONIA ENERGY - ENVIRONMENT AND SUSTAINABLE DEVELOPMENT) IS A WALLOON ORGANIZATION INCLUDING ONE HUNDRED ENTERPRISES ACTIVE IN THE SECTOR OF SUSTAINABLE ENERGY

The Business Cluster plays a major role in business development in the «sustainable energy» areas. Sustainable energy stands for:

- renewable energy sources
- the implementation of processes allowing to achieve energy savings, energy efficiency and greenhouse gas reduction including CO₂, in industry and in the tertiary sector
- the development of products for the same effects, for industry, the tertiary sector or individuals (« green » products and services)

To promote investments in the production and exploitation of sustainable energy, the Cluster TWEED is organized according to the main following axes:

- the networking of stakeholders through the organization of conferences, networking events, visits to companies...
- the technical support to the drawing up of investment / R&D projects in the sector
- the promotion of the skills of the cluster members, especially during missions/trade fairs abroad
- the implementation of a technology watch
- the organization of « project groups » comprising enterprises with complementary skills in order to meet regional or European calls for tenders and provide comprehensive solutions to customers in industrial-scale projects
- the drawing up of market studies and economic and technological analyses on sustainable energy

TWEED MEMBERS

TWEED has more than 120 members, including 80% of enterprises. The members of TWEED are enterprises with a registered office and/or an operating site in the Walloon Region (or in the Brussels Region) active in the «sustainable energy » area, in all sectors. There are enterprises such as equipment assemblers, components manufacturers, energy producers but also services enterprises, design offices, CO2 certificates traders or training centres, research centres, university services and other public partners.
TWIST (Technologies from Wallonia for Image, Sound and Text) IS A BUSINESS NETWORK AND A COMMUNITY PLATFORM THAT FOSTERS INNOVATION AND GROWTH IN THE DIGITAL INDUSTRIES AND MAINLY IN THE SMART MEDIA INDUSTRY SECTOR.

TWIST MARKETS

- The content producers market: Cinema, TV, Animation;
- The TV Channels market: development of broadcast technologies and facilities;
- The marketing/communication/Event/Sport/Museum market: development of immersive and interactive content and technologies.

TWIST, A RECOGNIZED EUROPEAN COMMUNITY PLATFORM

TWIST has developed an expertise in the “smart media” market and more specifically in the fields related to “live sport & entertainment”: immersive & interactive technologies and content, hyper-personalization of content, AI, IoT, social networks, etc. In order to respond adequately to the issues related to these current and future technologies and to new market trends, TWIST can rely on a network of European and international partners based, notably, in Munich (Germany), Paris (France), Barcelona (Spain), Seoul (South Korea) or the USA. TWIST and its partners are supported by the European Commission.

TWIST, A RECOGNIZED REGIONAL COMMUNITY PLATFORM

Within 10 years, TWIST has built a strong network of some 110 members (representing 4,500 direct jobs and a turnover of 1 billion euros) including 80% SMEs, 5 TV channels, 6 universities & research centres and 2 investments funds. TWIST is also supported by its public authorities and is an official partner of Digital Wallonia, the digital strategy adopted by the Government of Wallonia.

FIGURES FOR THE SECTOR IN WALLONIA AND BRUSSELS (ESTIMATE)

- Turnover of the sector: € 1 billion
- Number of jobs: 5,000 direct jobs and 2,000 indirect jobs