

Innovation Statement – a call to global biotechnology action

Harmonising, defragmenting, accelerating, and scaling were the common goals identified in an inaugural meeting of biotechnology associations from across three continents at BIO-Europe in Vienna. The groups discussed their ecosystems in 2025 and their priorities for 2026, to deliver BIO Europe's inaugural **Innovation Statement** for this globally critical technology.

Key bottlenecks to robust biotechnology sectors were identified across the groups, with proposed solutions and directions for development. The intention is to convene twice per year at events in the BIO-Europe conference series to expand global collaboration, engage global policy makers and call for harmonised policy action across countries.

The growing strategic significance of biotechnology

The Innovation Statement reflects priorities from a broad biotechnology coalition, including biotechnology associations representing regions and countries of all sizes from Europe, Asia and North America, with many inside larger blocs such as the EU. Some have relatively mature life science and biotech ecosystems, with high political awareness, whilst others are growing recognition, capacity and economic footprint. In many areas, primary conventional sectors have often taken priority, such as automotive and steel, with biotech positioned as a future competitiveness angle. However, now, such existing sectors are being identified as insufficient, and the high-tech agenda is gaining momentum.

Geopolitical shock and urgent action

2025 delivered a profound geopolitical shock to biotechnology innovators and markets. In addition to existing strains to the ecosystem from Covid and the ongoing war in Ukraine, the imposition of tariffs and the move towards most favoured nation pricing were sources of further destabilization. These factors are reshaping innovation and manufacturing pathways globally.

This has focussed political and financial attention towards key deliverables for biotechnology regions. The removal of barriers to ensure access to services, capacity and strengths that match innovation needs is identified as the key action area for change. Innovation must be able to grow and move without complexity.

Response to the geopolitical shock has also changed priorities and timescales for action. Improving regulatory frameworks and skills capacity has become a competitiveness priority, with regions such as the EU and Canada taking significant actions, targeting changes that increase market access, speed and scale.

The defragmentation of markets is critical. This includes clinical trials, which experience fragmentation on multiple levels, the ability to grow home-based innovation and to open international markets. Movement across borders is integral to this, whether across regions in the same country, or across larger blocs.

A global call to action for innovation and delivery

The focus is on well-connected critical mass of biotechnology growth, not just the headline grabbing unicorns, but resilient, long lasting industrial activity. Coherent and ambitious government policy is central. Regulatory reform has already been initiated in regions, including the EU, which is undertaking a series of regulatory simplification omnibus legislations plus a dedicated Biotech Act, with Part I launched in December 2025.

Global Associations call for the key ambitions for biotechnology growth to:

- Unlock locally generated intellectual property and drive better commercialisation

- De-risk long term investment for innovators, compared to short term exit from overly de-risked early investment
- Connecting regional with national and international pathways
- Enable growth through geographical mobility, agility and scale
- Simplify and defragment regulatory frameworks
- Contribute into emerging biotech applications such as defence, especially where conventional defence is not a national capacity
- Benefit from a disrupted skills market and build value within key technology platforms
- Develop and strengthen trade deals and partnerships

Attending Organizations:

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| 1. Atlanpole (FR) | 15. International Contract Pharma Association (IN) |
| 2. BioM (DE) | 16. Life Science Nord (DE) |
| 3. BIOQuébec (CA) | 17. Life Sciences British Columbia |
| 4. Biosaxony (DE) | 18. Mabdesign (FR) |
| 5. Biotech Austria (AT) | 19. Mediwailes (UK) |
| 6. BIOTECCanada (CA) | 20. Navarra Health (ES) |
| 7. Biowin (BE) | 21. OBN (UK) |
| 8. BIODeutschland (DE) | 22. One Nucleus (UK) |
| 9. CEBR (EU) | 23. Oslo Cancer Cluster (NO) |
| 10. EuropaBio (EU) | 24. Pbio (PT) |
| 11. Finnish Bioindustries (FI) | 25. Prague BIO (CZ) |
| 12. France Biotech (FR) | 26. Swiss Biotech Association (CH) |
| 13. HBio (GR) | |
| 14. Hollandbio (NL) | |