

Accelerating Business Opportunities in SynBio

...unlocking the value chain in Navarre





Capgemini provides *boutique, world-leading innovation at scale*

As class leaders in their own right, Cambridge Consultants, frog and Synapse work at the bleeding-edge of innovation to solve the big societal problems

frog Part of Capgemini Invent

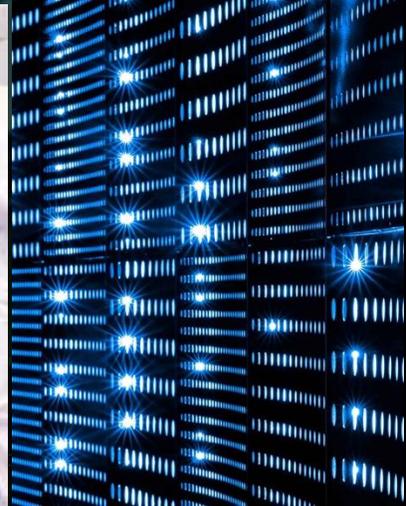
The business reinvention partner, crafting transformative human experiences.

 **cambridge consultants**
Part of Capgemini Invent

The deep-science and tech powerhouse of Capgemini, creating new-to-the-world innovation

SYNAPSE
Part of Capgemini Invent

The physical edge of digital transformation, through product development and sustainable design.





The bioeconomy is a multi-trillion dollar industry set to grow over the next decade, offering new ways to solve the biggest global challenges



Improve global food security



Enable healthier, happier lives



Build a sustainable future



The time *'really is'*
now...

96%

of organisations are already
pursuing Biosolutions

We surveyed 1,000+ corporate
executives & 500+ start-ups



SCAN ME



Sustainability remains
a key driver....

72%

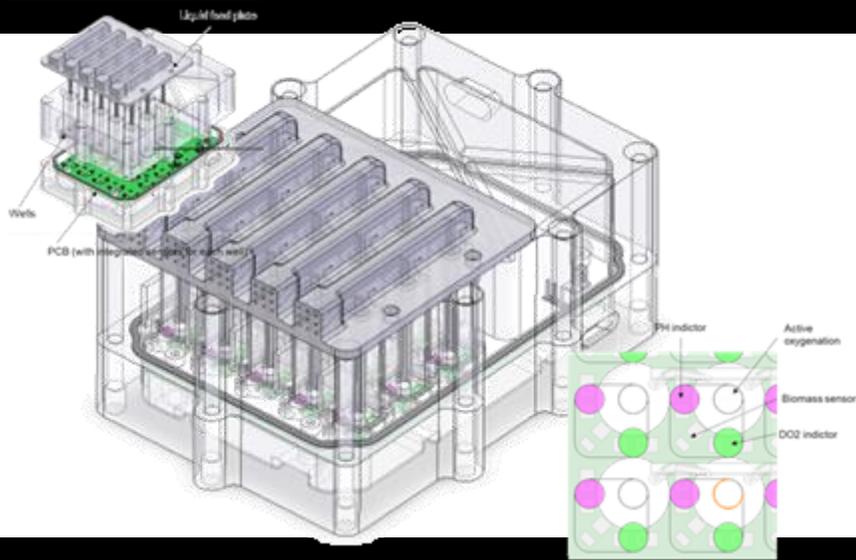
believe that biosolutions *have the potential to* significantly accelerate sustainability goals

We surveyed 1,000+ corporate executives & 500+ start-ups

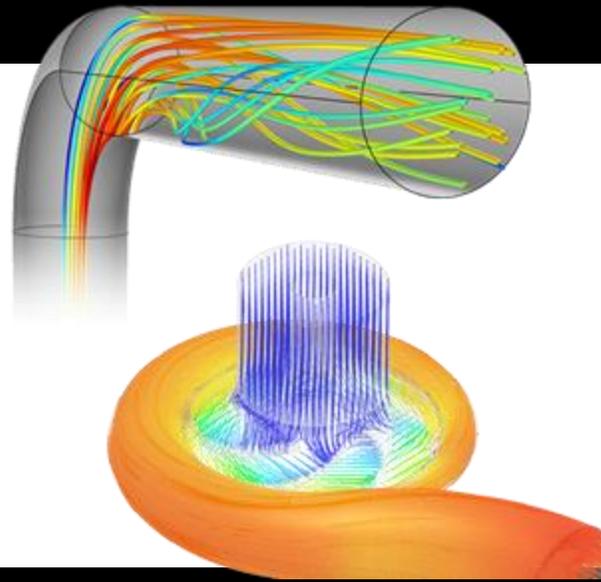


SCAN ME

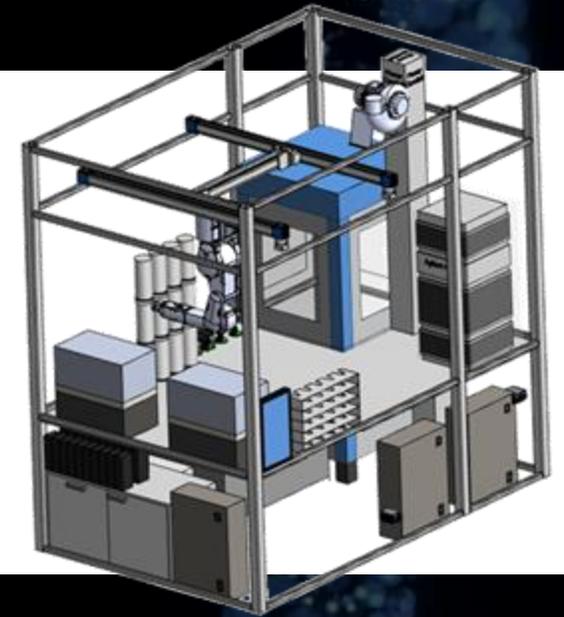
Converging tech & AI means biology is no longer purely in the realm of biologists...



High correlation
screening



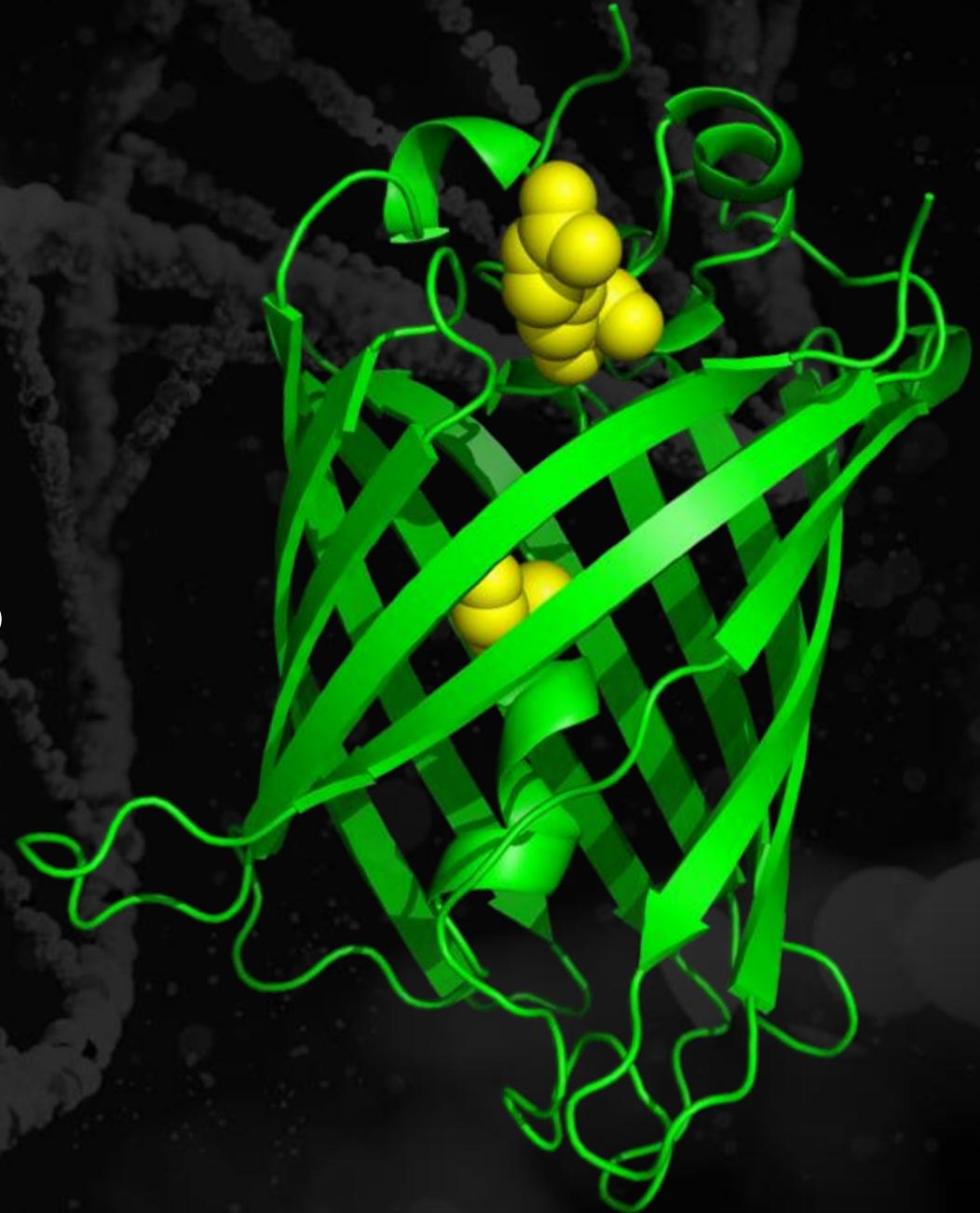
Thermofluidic
modelling



AI Native
facilities



Gen AI is a huge game changer. Our pLLM discovered world leading protein variants with 99% less data points





However there remain
barriers...

Overcoming these barriers
will be crucial over the next
few years



Regulation

63%

of startups cite regulatory complexity as a challenge, with 53% believing that regulations are outdated or restrictive



Talent and upskilling

62%

of firms lack the multidisciplinary talent required to progress effective biosolutions

A hand wearing a blue nitrile glove is pointing with a black pen at a DNA microarray. The microarray consists of a grid of small, colorful spots (red, green, blue, yellow) on a dark background. The background is slightly blurred, emphasizing the hand and the pen.

High cost barrier-to-entry

63%

of engineering biology startups say they face challenges in obtaining financing and 52% of corporates cite high costs to commit



Infrastructure

64%

of start-ups and 57% of corporates cite the lack of suitable large-scale infrastructure



Consumer and public perception

65%

of startups cite lack of market acceptance as a barrier



Uniting these challenges and opportunities require building ecosystems and communities...

an ecosystem like Navarre

- Multi-trillion euro opportunity
- Commercial acceleration
- Corporate & Sustainability focus
- Bioconvergence
- Gen AI accelerators
- Nurturing Talent
- Investing in infrastructure

Business

Research

Policy



European ecosystems

Research



IMPERIAL



Policy

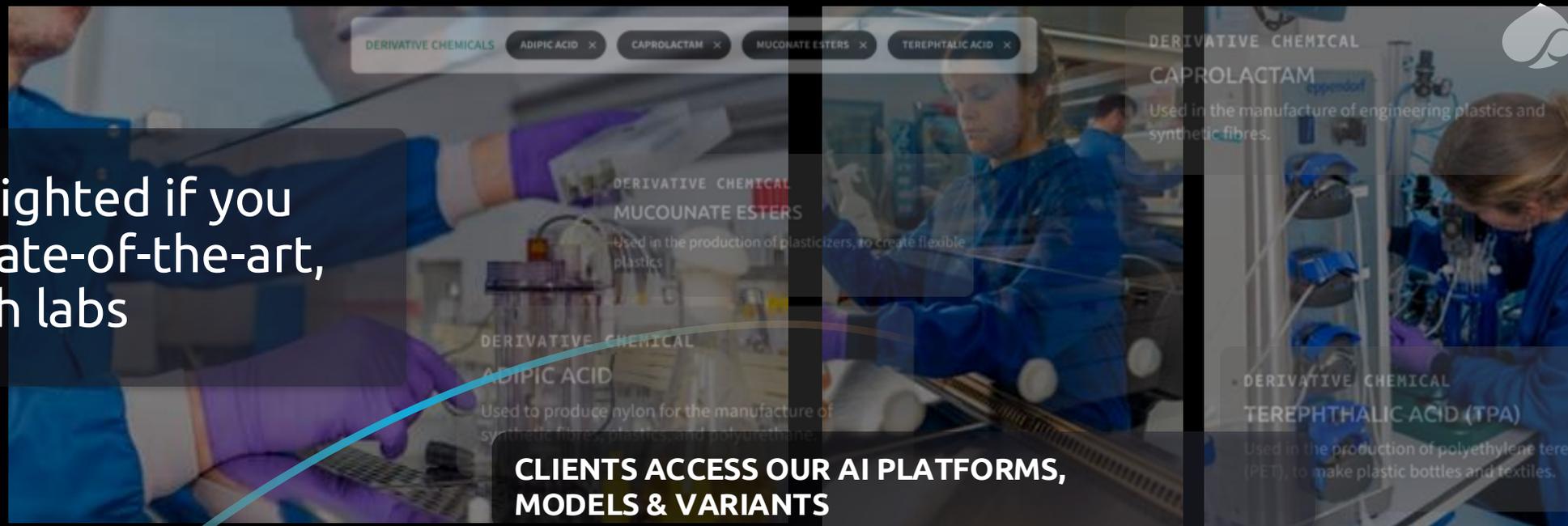


WORLD ECONOMIC FORUM

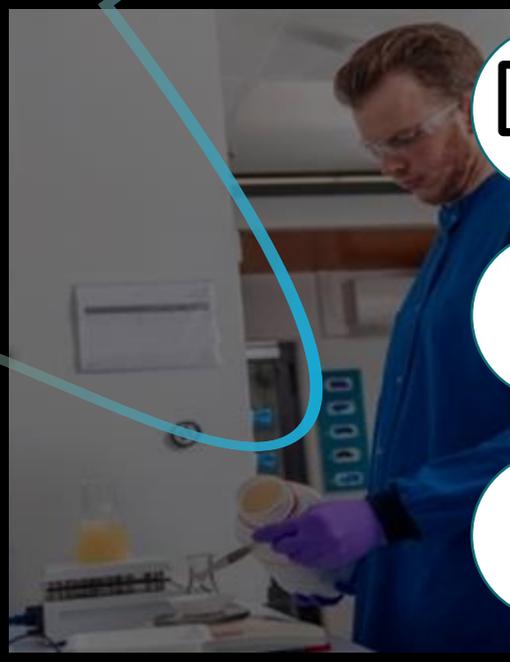
Business & investment



We would be delighted if you could visit our state-of-the-art, AI-driven, biotech labs



CLIENTS ACCESS OUR AI PLATFORMS, MODELS & VARIANTS



Retrosynthesis AI – Proprietary Pathway Discovery

Our AI-driven tool maps **novel biochemical pathways**, identifying the most efficient routes for bio-based ingredient production, reducing trial-and-error in strain engineering.



Metabolic Modelling AI – Predictive Yield Optimization

Our proprietary AI simulates **enzyme-substrate interactions**, using deep learning to optimize metabolic conditions and maximize production yields.



AI-Driven Protein Optimization – Smart Variant Selection

Our AI selects top-performing protein variants, outperforming traditional screening and rational design to accelerate enzyme and biocatalyst development.