

Hit the world running UK

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Why the UK?

- One of the most productive life science economies in the world employing more than 400,000 employees
- 35% of pharma products discovered in Europe from UK
- 35% of European clinical trials take place in UK
- Revenue generated from life science products £23 billion (2004)
- UK pharma export account for £13.9 billion (2006)
- In 2006 UK Pharma industry invested £3.3 billion in R&D
- Top four international institutions for post-doc work in UK

Source: UK Trade & Investment, 2008

Critical factors for cluster development

- Strong science base
- Entrepreneurial culture
- Growing company base
- Ability to attract key staff
- Availability of finance
- Premises and Infrastructure
- Business support services & large companies
- Skilled workforce
- Effective Networks

UK Life Science Clusters

- Cambridge
- London
- South East (Oxford)
- South West
- North West
- East Midlands
- Scotland
- Wales
- Northern Ireland

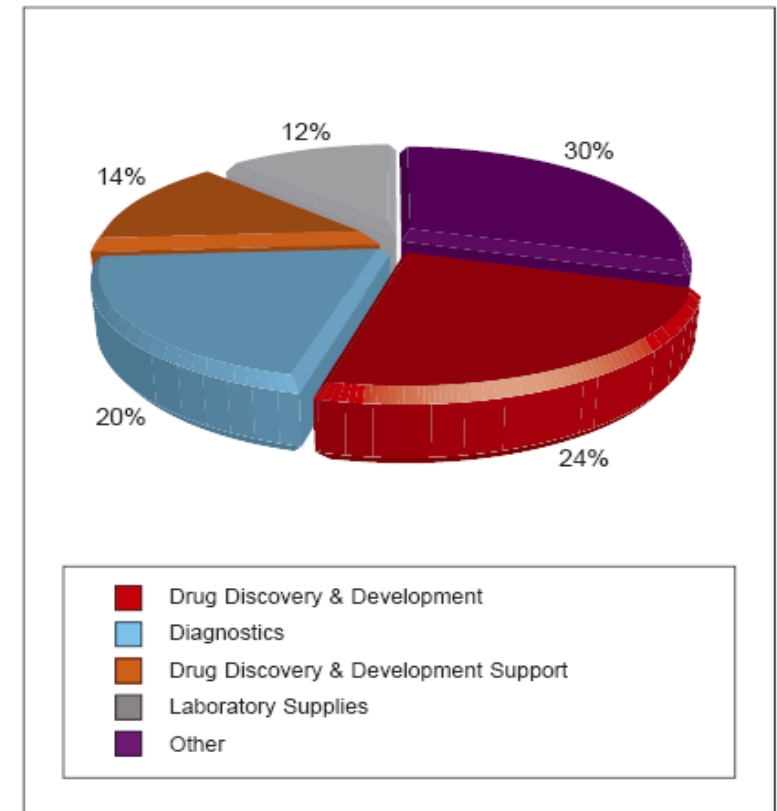
Cambridge

- 250 companies (GSK, Amgen, Genzyme)
- 14 Nobel prize winners in Chemistry & Medicine (since Watson and Crick)
- Leading centres: Sanger Centre, John Innes, Babraham Institute
- University Hospital: Addenbrookes, Papworth
- VC Funding: Avlar Bioventures, Merlin Biosciences
- Regional Industry Group: ERBI (over 300 members)
- Labs/Offices: 1.5 million² feet labs in Cambridge region

London

- 100 Bioscience companies
- 5 leading medical schools on 15 hospital sites
- 28 Universities, 50 clinical research institutions
- Incubator space: London BioScience Innovation Centre (LBIC) Imperial Biocubator, Whitechapel Innovation Centre
- Home to MHRA and EMEA
- LSE (Main and AIM)
- London Technology Network, London Biotechnology Network

- 142 companies in cluster
65% companies greater than 6 years old, 13% new start ups
- Since 2005 over 30 companies have joined the BioCluster
- PowderMed exit £214 million in 2006



Source: OBN BioCluster 2008

Other strong regional clusters

North West

- Bioprocessing strengths: Eli Lilly, Novartis Vaccines, MedImmune (Speke, Liverpool)
- National Biomanufacturing Centre
- UK Biobank: 500,000 volunteers, 40-69 years of age for 20-30 years run from Manchester University

Scotland

- 1.4 million square feet of flexible development
- The largest grouping of stem-cell researchers in the UK
- Purpose-built facility on the Centre for Biomedical Research site that will also include GMP-grade facility for development of HSC (Haematopoietic Stem Cell) lines
- On-site business development team

Value of Networks –Case Study approach

In search of KOL



In search of KOL



7000 Academics 40 Institutions



Leading UK academic found
for validation of neurological
enquiry in 2 hours

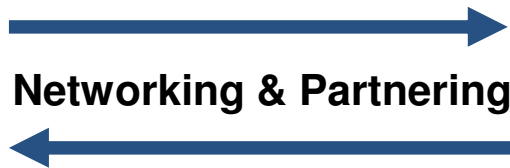


Inflammation and Immune Disorders Event



University of London

Lecturer in Oral Pathology



Networking & Partnering



Dry mouth side effect in 120+ drugs

Tooth decay & general health

Assessing state of current research

Enable extensive in-house testing

Examples of Regional Funding Support

SME Innovation Support

- Up to £6,000 specialist support to provide technical and commercial assessment of a company's innovation, free project consultancy plan and up to £30,000 in funding.

Accelerator Fund

- The Accelerator Fund is a loan fund which supports companies in the South East with the potential for significant growth. The fund can lend from £25,000 to £100,000.

National Funding Support

CASE STUDENTSHIPS- through research councils

- Students receive funding for 3.5 years. Companies provide an additional top up to the project of a minimum of a third of the funding. This top-up currently comes to about £22,000 over the course of the project. The student must spend at least three months at the company.

Technology Strategy Board

- Competition for funding of collaborative R&D projects involving two or more partners including one or more business.

BioPartnering Europe 11-14 October 2009

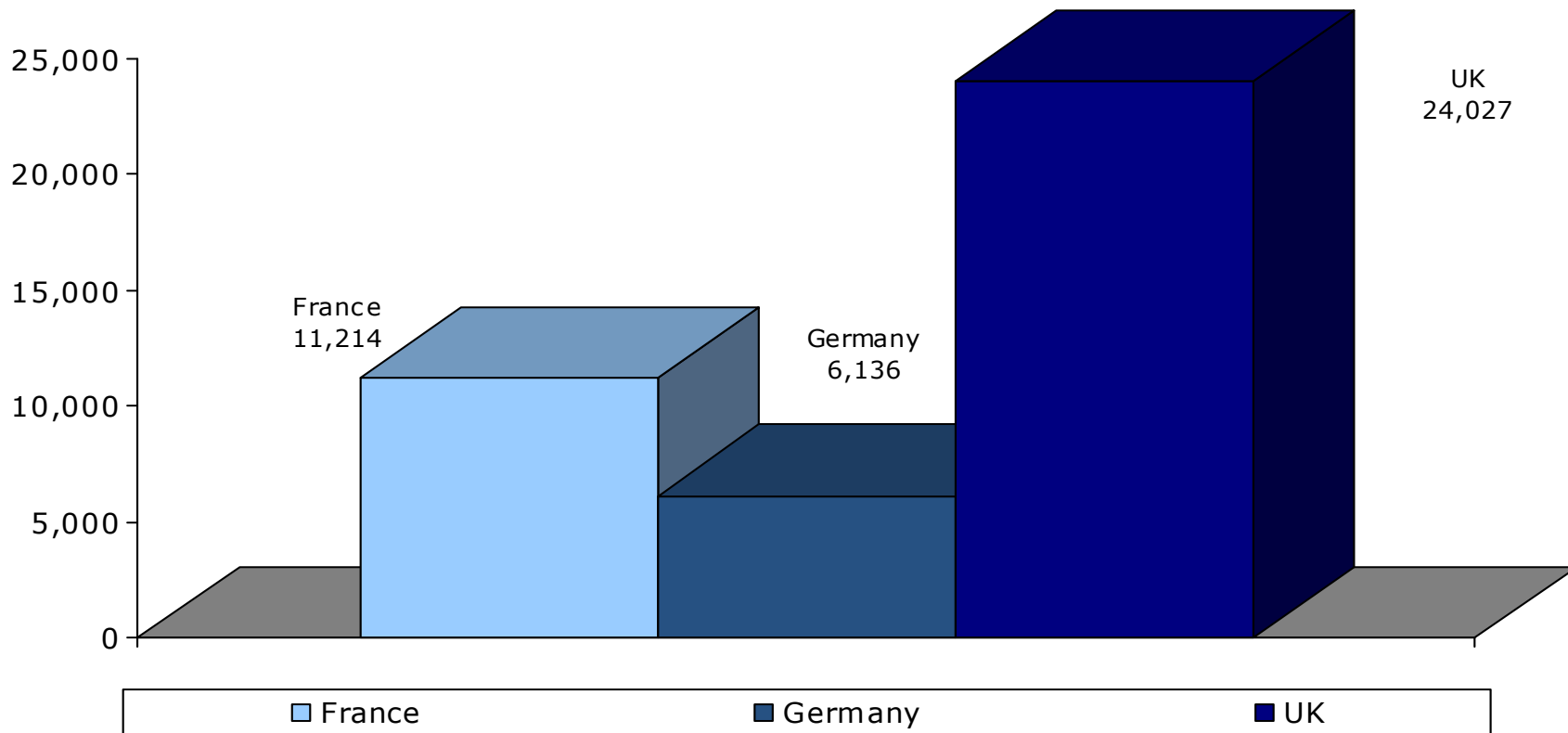
- **1,200+ delegates** from more than 650 companies
- **150 company presentations** by innovative, cutting-edge life science companies
- **5,500 one-to-one meetings** scheduled throughout the conference

Genesis 10-11 December 2009

- **700+ delegates**
- **Companies including:** Amgen, Eli Lilly, GE, GSK, Merck, Novartis....

Why the UK

Japanese companies as an example: UK is the top location for Japanese FDI (stock) in Europe. There are currently 1,445 Japanese companies based in the UK (*Source: Dun & Bradstreet, 2006*) and of this 256 are involved in manufacturing, 125 R&D, and 87 EHQ. (*Source: One Source, 2006*). The chart shows the total number of Japanese projects attracted by each of the key locations of interest at the end of 2005.



Investing in the UK

UKTI can help with:

- **Organising regional programmes**
- **Building key contacts**
- **Choosing your location**
- **Setting up your new office**

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