



Switzerland – One Nation – One Biotech Cluster

How Industry and Academia meet at KTT (WTT)

Cathy Kroll
Industry Leader

Agenda

- Clusters in Switzerland
 - KTT (WTT) Program
- Overview 2006

Switzerland at a Glance

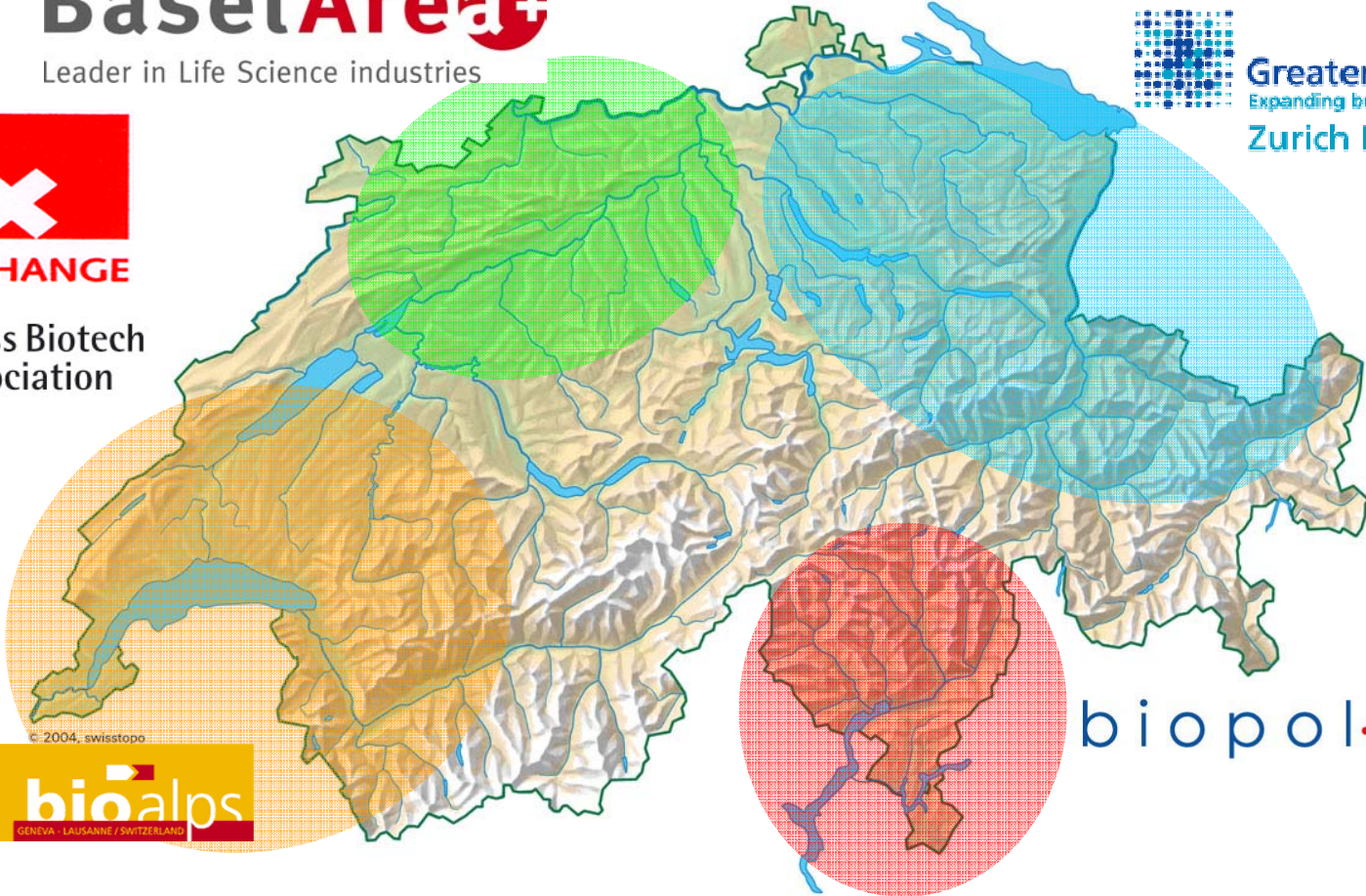
- 2005 was globally the 3rd best year in financing
- Again high number of FDA approvals for biotech products
- Switzerland ranks 2nd in respect to product pipeline in Europe
- Arpida made its IPO in May and with Speedel's listing the total number of listed biotech increased to 9 companies; more companies to come in the near future
- CHF 295 million of venture capital found its way into Swiss biotechs, which makes Switzerland rank as number 3 in Europe
- Total of 229 companies (6 more than 2004) which reflects stable conditions for the industry
- Still tough times for early stage, not product focused companies regarding financing

BaselArea+

Leader in Life Science industries



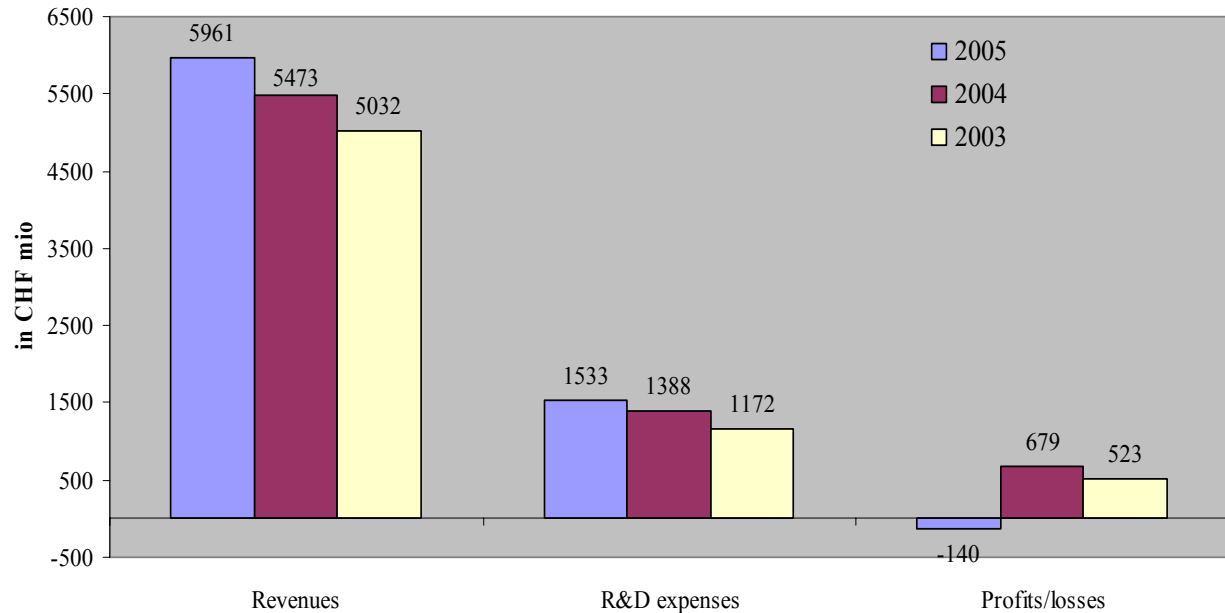
Greater Zurich Area
Expanding business horizons
Zurich MedNet



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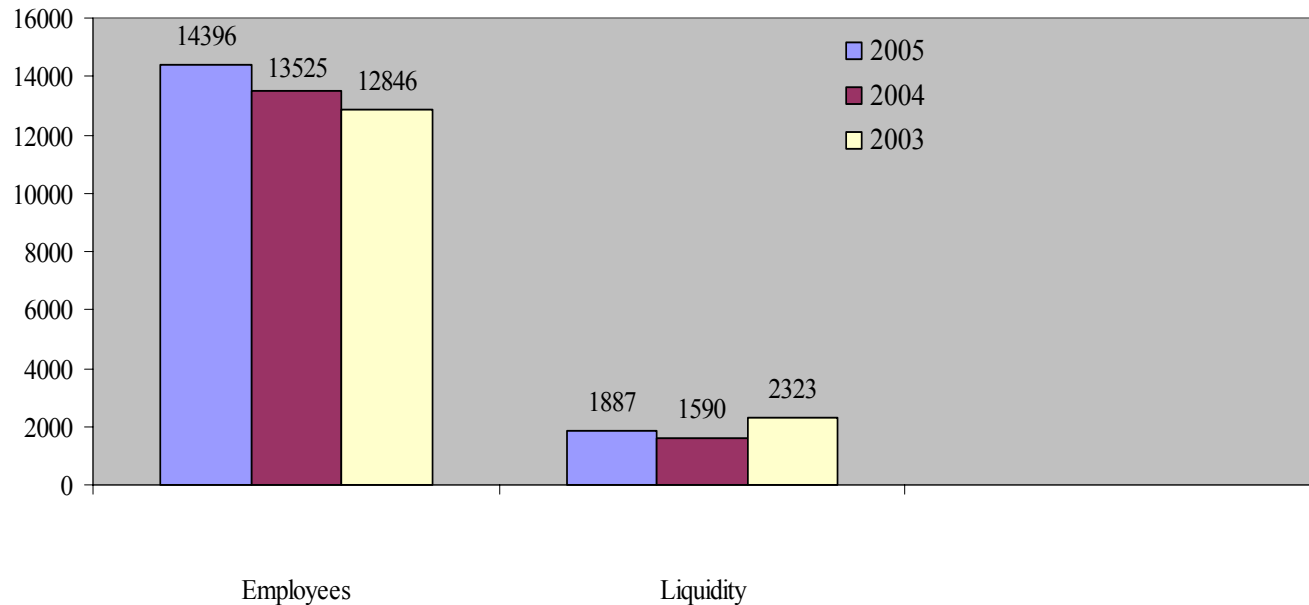
Revenues, R&D expenses, Profits/losses



Source: Annual Reports and Website information

Please note: All figures are headquarter-counted; The 2005-data in this table are based on the information available in early March 2006, when this report was compiled. At this time some of the companies had not yet disclosed the final financial figures for 2005. Therefore, some figures were carefully extrapolated on the basis of newest interim data publicly available (e.g. Q3 2005).

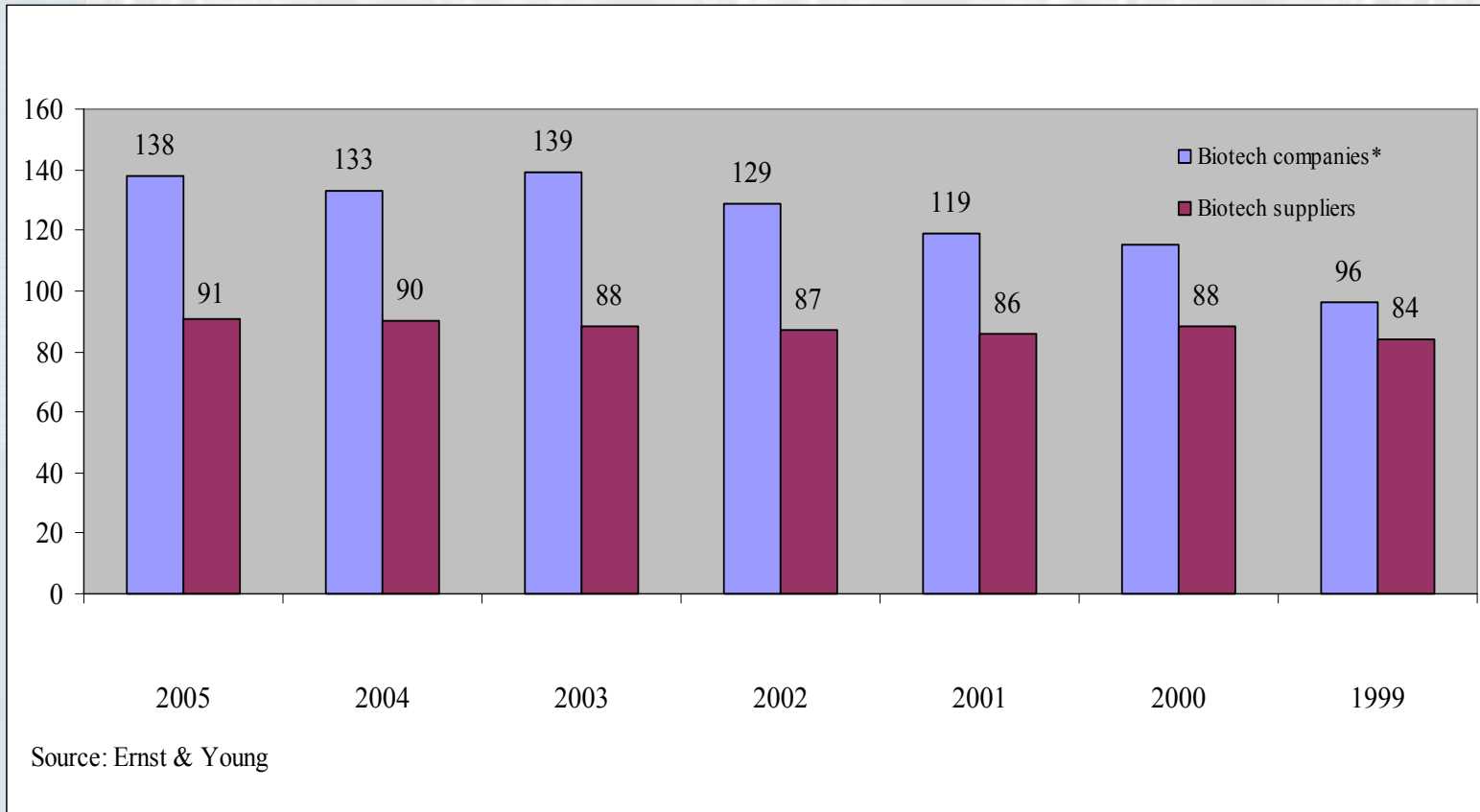
Number of Employees, Liquidity (in CHF mio)



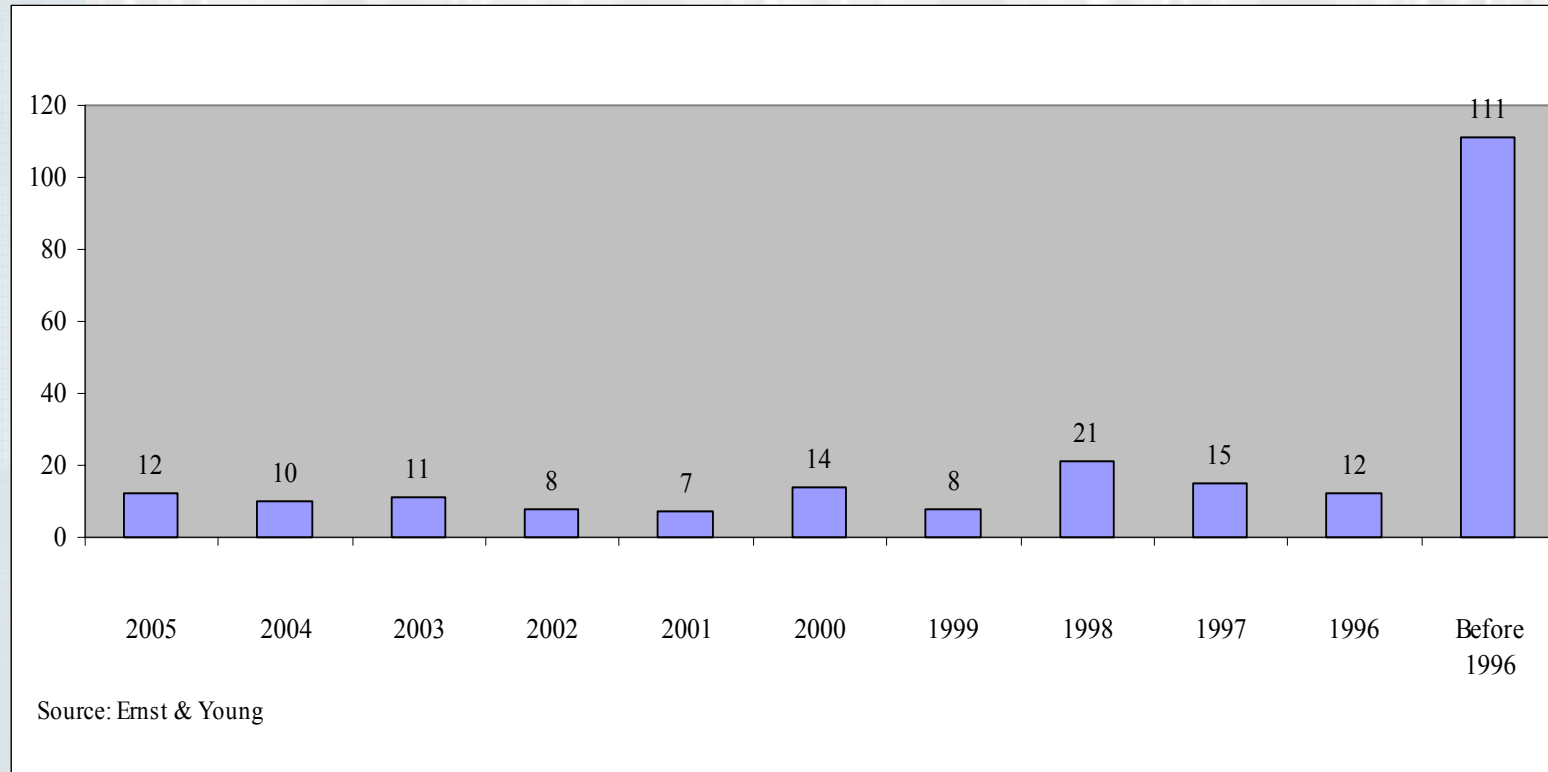
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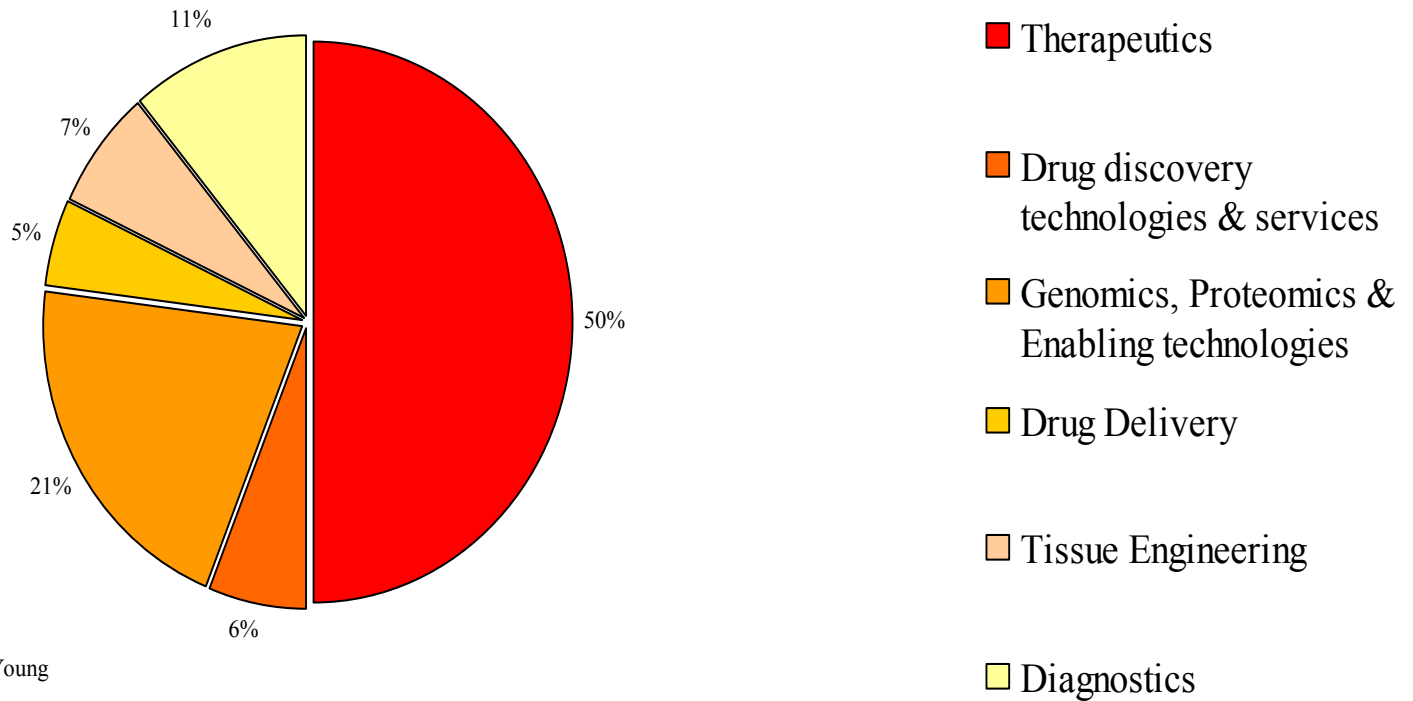
Number of Biotech Companies in Switzerland



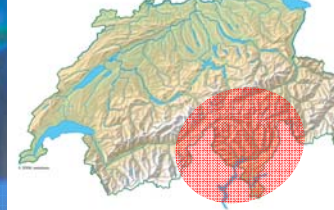
Year of Foundation of the 229 Swiss Biotech Companies



Industry Segmentation of the 138 Swiss Biotech Companies



• University of Zurich	20'600 students
• University of Geneva	13'200
• ETH Zurich	11'500
• University of Berne	10'200
• Universities of Basel	8'000
• Univ. of Applied Sciences /Life Sciences	17'000
• EPF Lausanne	5'100
• University of St. Gallen	4'500
• University of Neuchâtel	3'400
• Università della Svizzera Italiana	1'600
Total just over	100'000



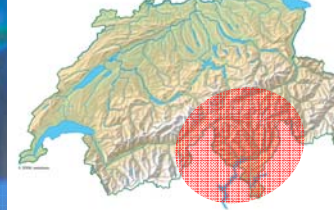
Main Industry

- **Chemical and pharmaceutical**
- **Banking**
- **Textile**
- **Tourism**

Key Academic Institutions

- **Università della Svizzera Italiana, Accademia di architettura,**
- **University of Applied Sciences**
- **Institute for Research in Biomedicine**
- **Istituto Oncologico della Svizzera Italiana**
- **Istituto delle Molle per la ricerca sull'intelligenza artificiale**
- **Centro Svizzero di Calcolo Scientifico**

Initiative: www.biopolo.ch



Specialities

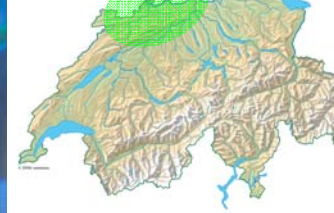
- **Strong manufacturing cluster**
- **Strong clinical settings (public and private)**

„Flagships“ (selection)

- **Helsinn SA, IBSA SA**
- **KerrHawe SA, Medacta SA**
- **Jetpharma SA, Micromacinazione SA**
- **Start-ups:**
 - **Mondobiotech SA**
 - **Oncore Therapeutics SA**

Competitive Advantages

- **Competitive position for research in human immunology**
- **Proximity to Italy**
- **Quality of life**

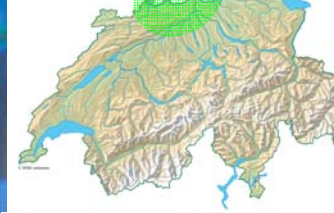


Main Industry

- **Life Sciences: Novartis, Roche, Aventis, Syngenta, Lonza**
- **Chemistry: Ciba Specialty Chemicals, Clariant**
- **Logistics: Danzas, Panalpina, Rhenus**

Key Academic Institutions

- **Universities of Basel, Biocenter/Pharmacenter**
- **Department of clinical-biological sciences (DKBW)**
- **National Nanotechnology Center of Competences in Research (NCCR)**
- **European Center of Pharmaceutical Medicine (ECPM)**
- **As from 2006: ETH Institute for systemsbiology**
- **Friedrich Miescher Institute (FMI)**
- **Swiss Tropical Institute**
- **Universities of Mulhouse, Freiburg, Strasbourg**



Specialities

- lectures / BioTech roundtables
- International conferences: BioSquare 2004, MipTec, ECB11th...
- access to trinational Life Sciences Network in France, Germany and Switzerland
- BioValley Journal (www.biovalley.com)

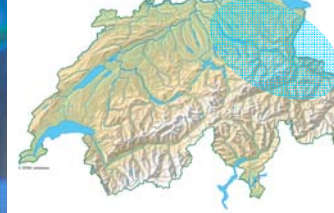
„Flagships“ (selection)

- Actelion Pharmaceutical Ltd.
- Basilea Pharmaceutica AG (IPO in March 2004)
- Hesperion
- RCC, Solvias, Speedel, etc.

Competitive Advantages

- BioValley (cross-border) initiative
- “big pharma” connections
- High concentration of science and engineering community





Main Industry

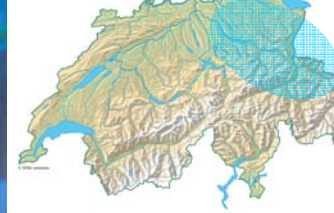
- **(Mechanical) Engineering**
- **Services**
- **Banking**

Key Academic Institutions

- **University of Zurich**
- **Federal Institute of Technology (ETHZ)**
- **Universities of Applied Sciences (Wädenswil, Winterthur)**
- **University Hospital**
- **Neuroscience Center**
- **Functional Genomics Center**

Initiative: www.zurichmednet.org





Specialities

- **LifeScience Incubator - Biotop**
- **LifeScience Park Zurich-Schlieren**
- **Conferences and Life Science seminars**
- **Focused Investment conferences**

„Flagships“ (selection)

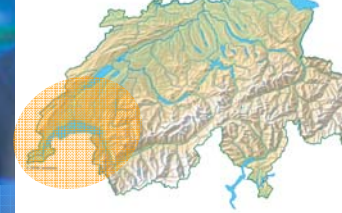
- **Cytos Biotechnology**
- **ESBATech**
- **Prionics**
- **SWX – Swiss Exchange**
- **Nobel BioCare**
- **Novo Nordisk**

Competitive Advantages

- **global initiative**
- **virtual network**
- **financial community**



Lake Geneva Area / BioAlps (1/2)



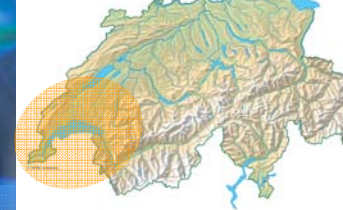
Main Industry

- **Microelectronics**
- **Watches**
- **Private Banking**

Key Academic Institutions

- **University of Geneva / Lausanne (HUG/CHUV)**
- **Swiss Federal Institute of Technology (EPFL)**
- **Swiss Institute for Cancer Research Ludwig Institute**
- **Swiss Institute for Bioinformatics**
- **ISREC, Lausanne**

Initiative: www.bioalps.com



Specialities

- **Geneva Proteomics (GeneProt)**
- **joint efforts of academic institutions in Life Sciences**
- **scientific parks / incubators**

„Flagships“ (selection)

- **Serono International Ltd.**
- **Addex**
- **NovImmune**
- **Medtronic**
- **GeneBio, Covance**

Competitive Advantages

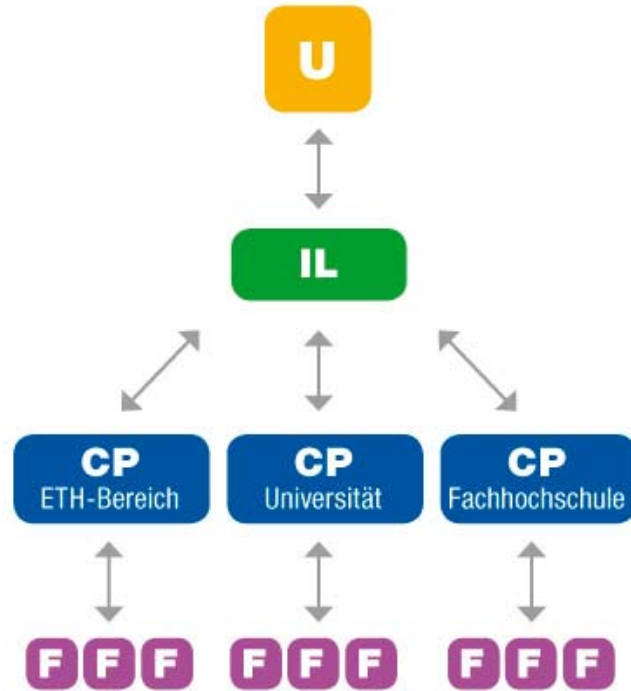
- **multi-disciplinary research activities**
- **international environment**
- **quality of life**

Bio Polo is part of the w6 – consortia

www.whoch6.ch

**Goal is to get more Pull Projects initiated
by the industry.**

How does it work?



- U** = Unternehmen
- IL** = Industry Leader
- CP** = Contact Point
- F** = Forschende

Internet based potential





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Forschung und Entwicklung werden immer internationaler. So existieren auf europäischer Ebene zahlreiche Instrumente zur gezielten Förderung von F&E, die auch für Schweizer KMU sehr attraktiv sein können.

Die bekanntesten sind dabei wohl das [6. Forschungsrahmenprogramm](#) oder das geplante Programm für [Wettbewerbsfähigkeit und Innovation](#) der Europäischen Union.

In diesen grossen Programmen den Überblick zu bewahren und das richtige Teilprogramm, die passende Ausschreibung oder die besten Kooperationspartner zu finden, ist nicht immer ganz einfach. Wir bieten Ihnen kostenlos professionelle Auskünfte zu den europäischen F&E Programmen und weisen Ihnen – je nach Ihren Bedürfnissen und Interessen – den Weg zu den für Ihren Bereich zuständigen Kontaktstellen und –personen in der Schweiz oder in Brüssel.

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Für SBA-Mitglieder gelten die folgenden Vorzugskonditionen:

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Planen Sie eine Werbekampagne? Welche Zeitschrift wird von wem, wo gelesen? Dank der Zeitschriftenliste mit Angabe von Auflage, geographischer Verteilung und Kategorisierung der Leserschaft können Sie Ihre Inserate besser platzieren.

Journal	Circulation	Geographic Distribution	Customer Segments
American Biotech Laboratory	53'000	USA	15% chemistry 12% biotech 10% pharma 10% analytics 7% genomics 7% drug discovery
American Clinical Laboratory			
American Laboratory News	91'000	USA/Canada	25% chemistry 13% analytics 13% university 12% pharma
Bio Tech International	27'000	78% Europe 14% Asia	13% pharma 13% molecular biology 10% biochemistry 6% microbiology 5% cell biology

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Ausgewählte Links
Home

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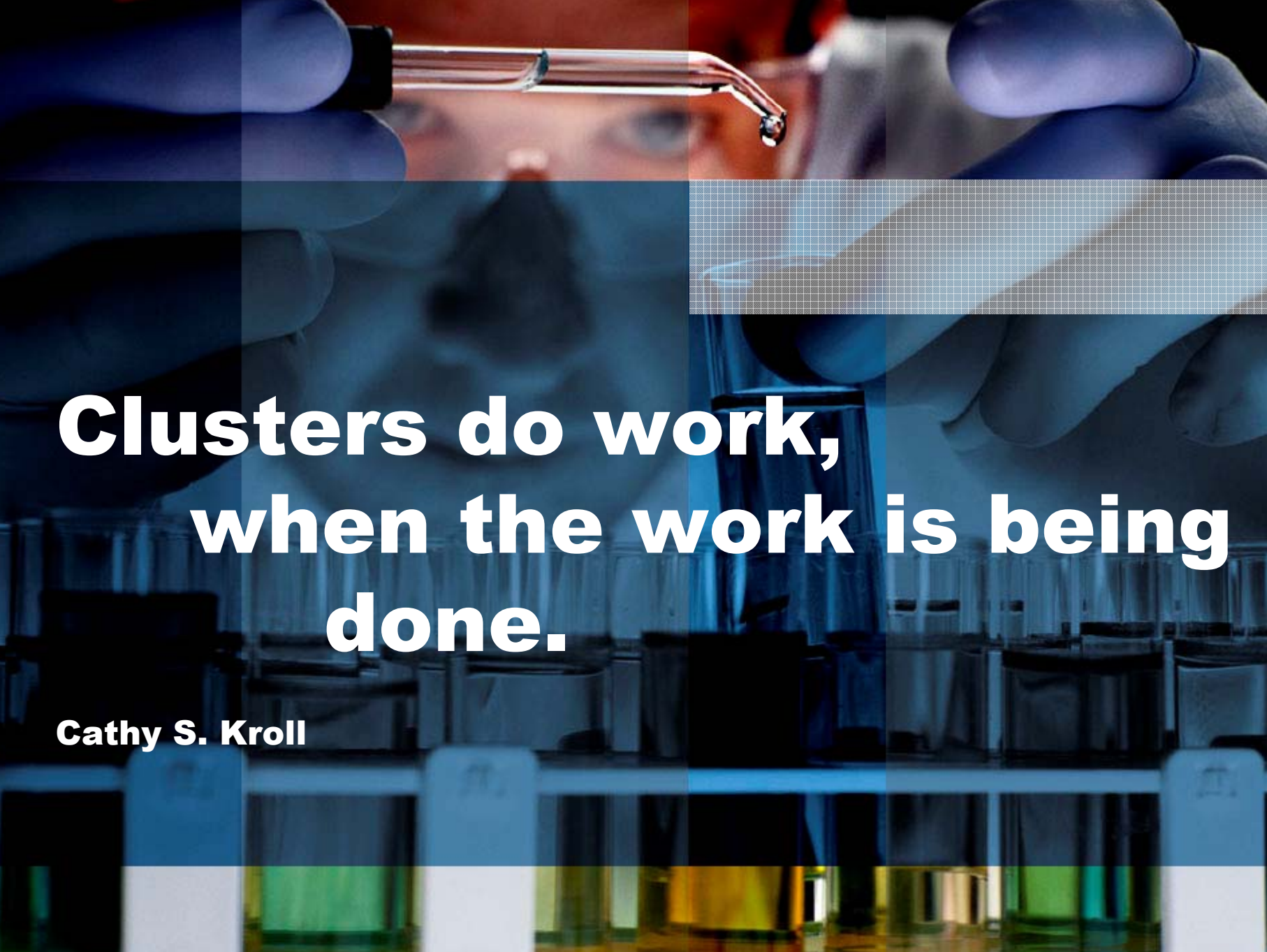
Kontakt:

Meine Email-Adresse:

SBA-Member:

Ja Nein

Mitteilung:

A collage of laboratory-related images. The top left shows a close-up of a hand holding a pipette with a drop of liquid. The top right shows a hand holding a test tube. The background is a blurred image of a person's face, possibly a scientist, looking intently. The bottom part of the image shows a rack of test tubes containing various colored liquids (green, yellow, orange, red).

**Clusters do work,
when the work is being
done.**

Cathy S. Kroll