



europaean **Life** **Science**

Clusters – the future
of the Baltic Sea region

Food and therapy interaction
project launched in Øresund

CytoCentrics speeds up
patch clamp screenings

The UK – a formidable force in the
commercialisation of nanotechnology

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Stronger clusters needed

More than 250 million patients have benefited from the 142 biopharmaceuticals approved since 1982 (treatment of heart attacks, multiple sclerosis, breast cancer, cystic fibrosis, leukaemia, etc). And the report “Competitiveness of the European biotechnology industry” from the European Commission, Enterprise and Industry DG shows that, overall, Europe’s basic research and knowledge-building are world class. However, Europe does not excel in turning research into commercial applications on a broad front.

Compared to the US, the number of successful European biotech companies is still low, even though the continent excels at new company formation and even after the 2001 crunch new company formation in 2003-2004 was as high as 18-25% in several Member States (ES, IT, AT, GR, NL, PT) while reaching approximately 15% in some countries with a mature biotech industry (DK, UK, CH, SE, IE, FR).

Europe’s competitive edge lies mainly in healthcare applications and in industrial biotechnology including the chemical industry. But the rate of start-ups is a poor measure of success and the growth problems of European SMEs are a sign of warning. Fewer but stronger companies is a more preferable path.

Many company clusters have been formed in Europe with the aim of bringing together the resources of the life sciences industry: hospitals, universities, public research institutions, and investors. Although progress has been made, Europe is still very much fragmented in terms of the research communities, the business communities, and the capital markets. The majority of European biotechnology clusters do not seem big enough to compete effectively with those in the US.

Let us hope that the launch of The Council of European Bio Regions in 2006 will enable better networking between bioclusters and regional associations in Europe. By telling about what is happening in the different life science clusters across the continent, we as a publication also aim at bringing the clusters together.

However, let us not forget the opportunities awaiting European enterprises at the other end of the Atlantic Ocean or in the Pacific. In this issue we’ll take a closer look at the Montreal life science scene, as well as presenting some news from Hong Kong and Singapore.

Anders Lindgren
Editor-in-Chief

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Advisory Board of European Life Science Journal

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Three strategies for healthy growth

By Johan Falk

The reality for contract research organisations (CROs) is changing. The happy go lucky attitude of the CRO-boom of the early '80s and '90s has been replaced by customers who know what they are looking for in a CRO. The name of the CRO-game is spelled: geographical coverage, competence and resources.

CONTRACT RESEARCH Trial Form and Support (TFS) are now consolidating and implementing their strategies in order to meet the changing realities for a clinical CRO with growth ambitions.

"The marketplace has matured considerably during the last decades," TFS' CEO Daniel Spasic states. "If we want to continue to be the largest independent and private European CRO we have to act resolutely."

TFS is a Swedish company with subsidiaries in 16 countries, two of which are located in Asia, in Tokyo and Mumbai. The common thread for all the TFS affiliates is the focused support on development of pharmaceuticals and devices in the human trial phase. This support can come in the shape of clinical trials by the Phase I Unit located at the Karolinska University Hospital in Stockholm, a pan-European Project Delivery team in Phase II and III, or in the business area that is growing fastest at the moment – Contract Placement Solutions.

"The market currently strongly favours outsourcing in many forms. One effective way for pharmaceutical companies to ensure availability of skilled personnel in times of non-hiring, is to contract our skilled clinical research consultants," Daniel Spasic says.

Building up for the future

When TFS now looks to the future there are three points on the agenda for success. One of these leads is to do the same thing that TFS did in 2005, namely acquisition.

"When we acquired Clinical Data Care (CDC), overnight we became a major European clinical CRO. I believe that within two years we will have to do a similar acquisition, size wise, in order to keep the positive momentum going," Daniel Spasic states.

In fact the strategy of acquiring is already being implemented with assets in

"The marketplace has matured considerably during the last decades"

two new markets coming into the TFS fold, with 40 new skilled co-workers and revenues of SEK 35 million added to the financial muscle of TFS for 2008.

Even if acquisitions will be a major part of the future growth for TFS, it is only a purpose to an end not a goal in itself. TFS will continue to grow organically as it has done since its establishment in 1996. During the third quarter of 2008 a new vice-president for three new subsidiaries in Poland, The Czech Republic and Romania will be recruited.

"All of our efforts are geared towards one goal, to be able to have the geographical coverage to ensure that our clients feel secure in our ability to answer any need that they may have," Daniel Spasic says.

Clearer definitions

The third point of implementing a continued success for TFS is to put the different business areas in sharper focus.

"We will emphasize the contract placement solutions as a separate business area, separating it more clearly from our project delivery based activities and our early clinical development organisation."

In making this sharper definition with-

in TFS the outcome will not only be clearer decision processes and growth incitements for the local subsidiaries, it will also put the customer need in sharper focus. Each business area will become more consistent in their work and thereby more efficient, and this will create a 'best in class' performance in each function.

"I think that a more independent contract placement business helps our clients tremendously. I also feel that separated business areas will make it easier for our clients when they contact us, they know exactly who they need to talk to within our organisation, depending on what services they are utilising from TFS."

With the three-step programme: acquisitions, organic growth and clearly defined independent business areas, TFS will be ready to reach for its goal. By the end of 2009 Daniel Spasic and his colleagues expect that the company turnover will have increased by 100%, reaching SEK half a billion and have an operational coverage in 20 key markets. ✚



Daniel Spasic, CEO of TFS Trial Form Support.