

Bionow

The North West UK Regional Biomedical Cluster

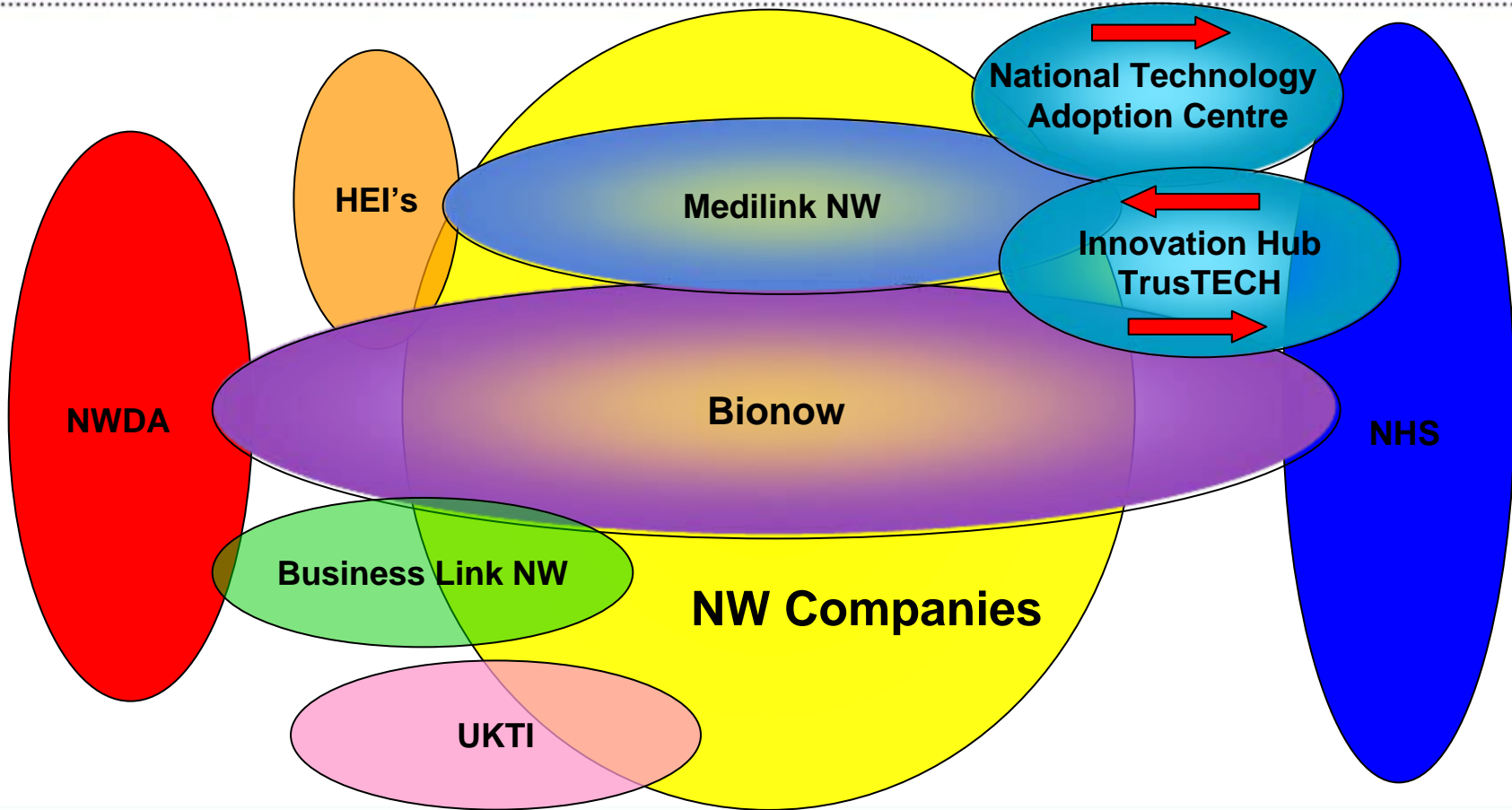
Dr Geoff Davison

Sector Head Biomedical & Director of Bionow, NWDA

- £106 billion economy, the 12th largest in Europe; a population of nearly seven million people and 230,000 successful businesses.
- Three-quarters of the UK's top 100 companies have a base here and it is home to more AIM-registered PLCs than anywhere else in the UK outside London.
- Manchester, voted Britain's Best City for Business 2007 behind London; Liverpool, one of Europe's fastest-growing economies and has a free zone for non EU goods (European City of Culture 2008); Cheshire, home to AstraZeneca's largest global R&D centre; Lancashire, a world leader in advanced manufacturing and engineering; and Cumbria, at the international cutting-edge of nuclear technology.
- Airports serving over 270 destinations worldwide, fast rail links across the UK, extensive motorway networks and a peerless technological infrastructure.

- Despite the size of its economy the GVA (or output) is 12% lower than the England average resulting in an output gap of £13billion
- The Regional Economic Strategy (RES) identifies internationally competitive sectors including biomedical where it will concentrate some of its efforts, to at least in part, address this gap
- Via the RES NWDA has a vision to create
“A dynamic, sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life for all..”

- **Bionow – the brand name for NWDA biomedical cluster development programme**
- **Biotechnology, Pharmaceuticals, Medical Devices & Healthcare Technology focus**
- **We work for and on behalf of industry including SME's**
- **Major interfaces are industry, HEIs and NHS (increasingly in current policy environment)**
- **Promote and market the North West biomedical cluster**
- **Run and support Network Events, Conferences, Annual Dinner & Award Ceremony**
- **Bid for internal and external funds to support biotech projects and companies**
- **Direct management and championing of Strategic Projects (portfolio value of c £70M)**
- **Direct interaction with other regional and national biotechnology organisations in the UK**
- **Direct interaction with BIS, DH & UKTI (UK) R&D/bio groups**



- 160 biomedical plus 120 medical device and healthcare companies employing close to 30,000 people – one of UK's top three bio clusters
- Seven multinational pharmaceutical companies (AstraZeneca, Eli Lilly, BMS, Novartis, Sanofi Aventis, GSK, Teva)
- One of the largest producers of pharmaceuticals in the UK:
 - Exports of £3.4 Billion in 2007
 - Balance of Trade £2.4 Billion 2007 (UK #1)
- Significant health & personal care sector eg SSL, Cardinal Health, Baxter, Terumo, Advanced Medical Solutions, Unilever, Vernon Carus, Depuy (J&J)
- Internationally renowned basic and clinical research centres in Manchester & Liverpool

Research Centres and Facilities

<ul style="list-style-type: none"> ICLRD Garsbury Laboratories Lancaster University Liverpool John Moores University Manchester Metropolitan University University of Bolton University of Central Lancashire University of Liverpool University of Manchester University of Salford One Technology Facility (OTF) 	<ul style="list-style-type: none"> Garsbury Innovation Centre Liverpool National Centre for Zoonosis Research Liverpool School of Tropical Medicine Liverpool Science Park Manchester Science Park Manuscript Incubator Mill Stem Centre Centre National Biomanufacturing Centre (NBC) Northwest Genetic Knowledge Park (Nougan) Northwest Institute for Bio/Health Informatics (NIH4) 	<ul style="list-style-type: none"> Pelargon Institute for Cancer Research Splice Biopark The Biomedical Cancer Research Centre (BCRC) The University of Manchester, Wilson Molecular Imaging Centre UK Centre for Tissue Engineering & Regenerative Medicine UK CRC Medicine for Children (M4C) University of Liverpool Cancer Research Centre University of Manchester Incubator Wellcome Trust Clinical Research Facility Wellcome Research Institute
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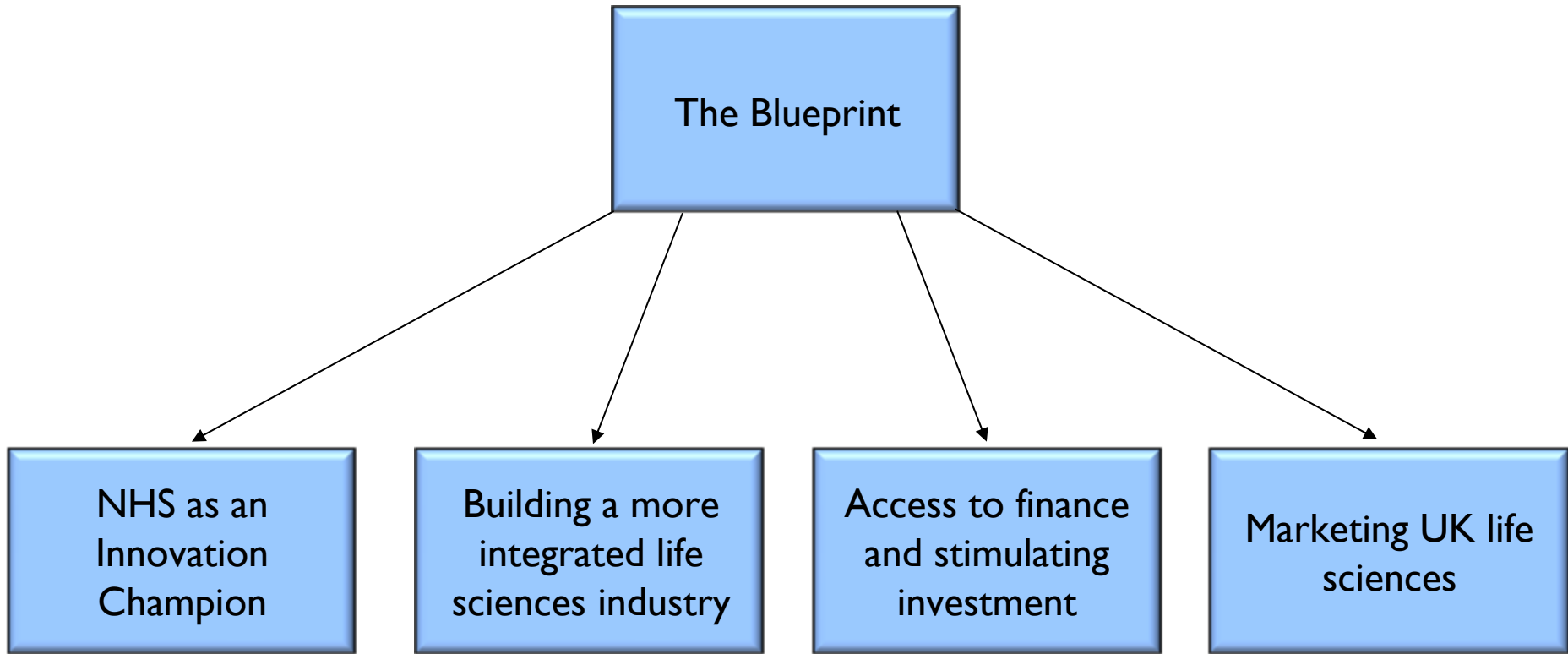
- **Leading NHS teaching hospitals with major population centres in Manchester & Liverpool for clinical studies eg Neurodegenerative Diseases, Cardiovascular, Diabetes**
- **Christie Hospital – largest cancer centre in Europe and leading clinical trials site**
- **Liverpool Biomedical Research Centre (Infectious Diseases)**
- **Manchester Biomedical Research Centre**
- **Wellcome Trust Clinical Research Facility**
- **NIHR Medicines for Children Research Network & NIHR Mental Health Research Network (with London) plus all other topic specific networks and 3 CLRNs**
- **MAHSC – Manchester Academic Health Science Centre**
- **TrusTECH - the IP and commercialisation hub for all research active NHS Trusts in the region and a UK benchmark for best practice**
- **DH National Technology Adoption Centre**
- **Medilink NW**
- **NHS National Blood Products Laboratories (Tissue)**

- Increase in no. core* companies = +61%
- Venture funding raised by 'incubator' companies c £312M
- Maturing of newcos - 11 of 17 main or AIM listed companies have done since 2002 (total mkt. cap c £500M Sep 2007) eg Renovo, Intercytex plus M&A eg Neutec Pharma (mkt. cap £1billion)
- Growth & investment centred round key hubs of Manchester, Liverpool/Speke & Cheshire (inc Daresbury)

* companies with majority activity based on R&D, manufacturing or lab based services for the biomed sector

- **27th January 2009: Prime Minister's Summit with Life Sciences industry. PM asked Lord Drayson to lead an "Office for Life Sciences"**
- **"Life Sciences" comprises Pharmaceuticals, Medical Biotechnology, and Medical Technology**
- **Mission: To establish a tailored approach to supporting the Life Sciences sector in the UK, a key strategic sector for future UK economic growth.**
- **April 2009: "New Industries, New Jobs" (NINJ) Report placed OLS in context of industrial policy. Life Sciences was identified as a key industry**
- **July 14th 2009: Published Life Sciences Blueprint**

- **A unified, cross-Government Life Sciences Policy that:**
 - **Supports the life sciences industry as a high-tech strategic industry of the future**
 - **Ensures the UK is the country of choice for life sciences companies to do business**
 - **Ensures NHS embraces its role as an engine for growth and a leader in innovation**
 - **Promotes continued excellence in world-class bioscience research and development**



- **Innovation Pass**
 - NICE-led process for giving NHS access to selected innovative medicines
 - Pilot in 2010/11 with a budget of £25m
- **Strategic Health Authority (SHA) delivery group**
 - Improve uptake and engagement between industry and the NHS
- **NHS Chief Executive**
 - To lead review of levers & incentives to accelerate the uptake of new medicines
- **Greater emphasis on research and clinical trials in the next NHS Operating Framework**
 - Building on the metrics which Trusts report in their Quality Accounts

- **Society of Biology will accredit undergraduate bioscience degrees from 2010**
 - Promote maths and practical skills
- **Establish an industry and Higher Education forum to address skills gaps**
- **Support for formation of UK Life Sciences Super Clusters**
 - Coordinate work across industry, Higher Education & the NHS
 - Boost international recognition of UK life sciences.