

Enterprise Ireland – Growing an Indigenous Lifesciences Sector

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Lifesciences Sector in Ireland

- ❑ Global Industry with sales of \$1.3 trillion. 7% CAGR.
- ❑ Vital to Irish economy. 50k+ people, Exports of €40bn annually, >50% exports
- ❑ World's 4th largest exporter of pharmaceuticals.
- ❑ 18 of the world's top 20 pharma companies; 15 of the world's top 25 medtech
- ❑ Europe's leading location for development/manufacture of medical technologies

Indigenous Lifesciences Sector

- **Burgeoning indigenous base with 200+ companies**
- **2008 sales of €800m, exports of €610m and employment of 5,000 people**
- **CAGR of 17% over '05-'07 and growth of 22% in 2008**
- **Strongest export regions for the sector are the Americas (32%), UK (19%), Northern Europe (15%) and GCEE (18%) followed by SEMEA (7%), Asia (8%) and ROW (1%)**

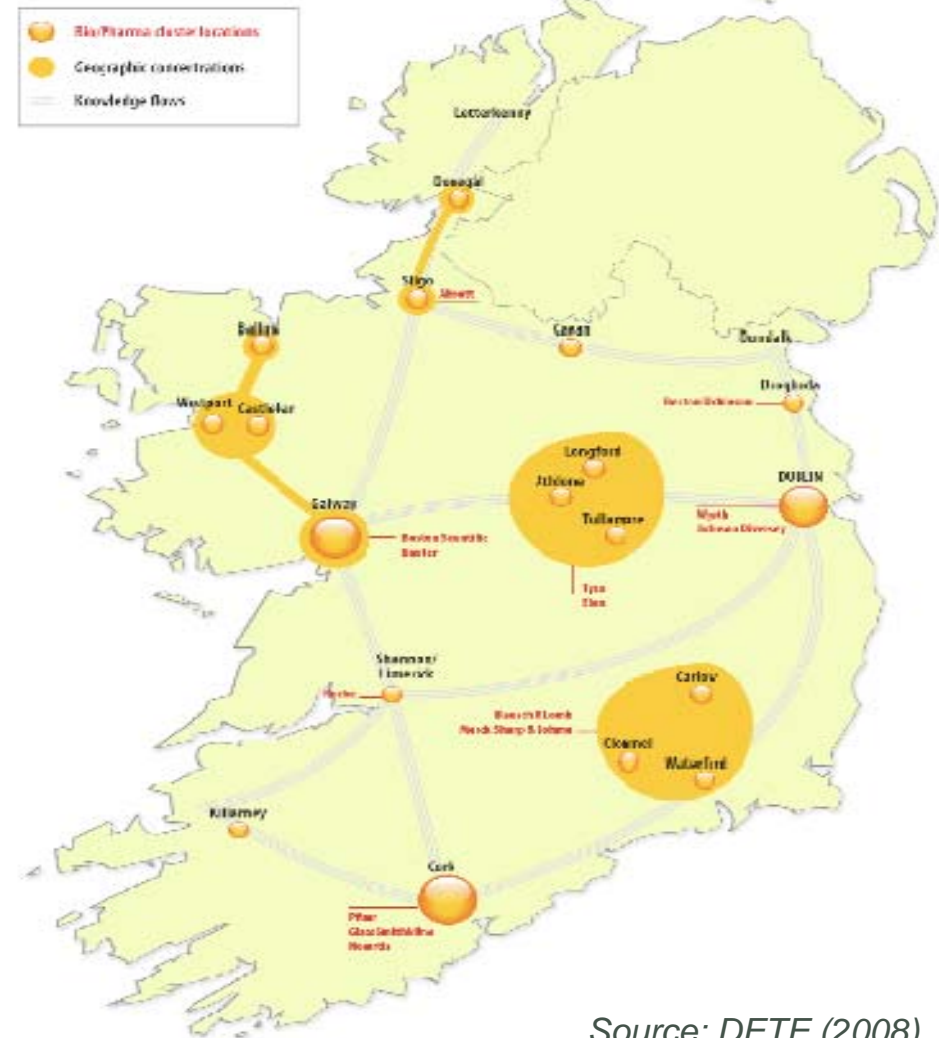
Indigenous Lifesciences Sector

■ Clusters of strength & excellence

- Medical sub-supply
- Finished devices & medical aids
- Diagnostics
- Chemicals, pharma/vet pharma manufacturing
- Drug development (speciality pharma, GI/immunology)
- Nutritionals* (health vs wellness)

Leverage Existing Cluster(s)

Ireland's bio/pharma cluster map



- High & MNC footprint in Ireland
- 200+ indigenous
- Number of clusters

Government Committed to Lifesciences Sector



An Roinn Fiontar, Trádála agus Fostaíochta
Department of Enterprise, Trade and Employment



Basic Research



Skill Training



Irish Owned Enterprise



Policy Analysis and Advice



Inward Investment

Strategy for Science, Technology and Innovation 2006-2013

- Research and Innovation central to Ireland's economic growth & sustained business development
- World Class Research
- Capturing, Protecting and Commercialising IPR
- R & D for Enterprise, Innovation and Growth
- €8B to 2013
- Dec 2008 – Smart Economy



Building Ireland's Smart Economy
A Framework for Sustainable Economic Renewal



www.enterprise-ireland.com

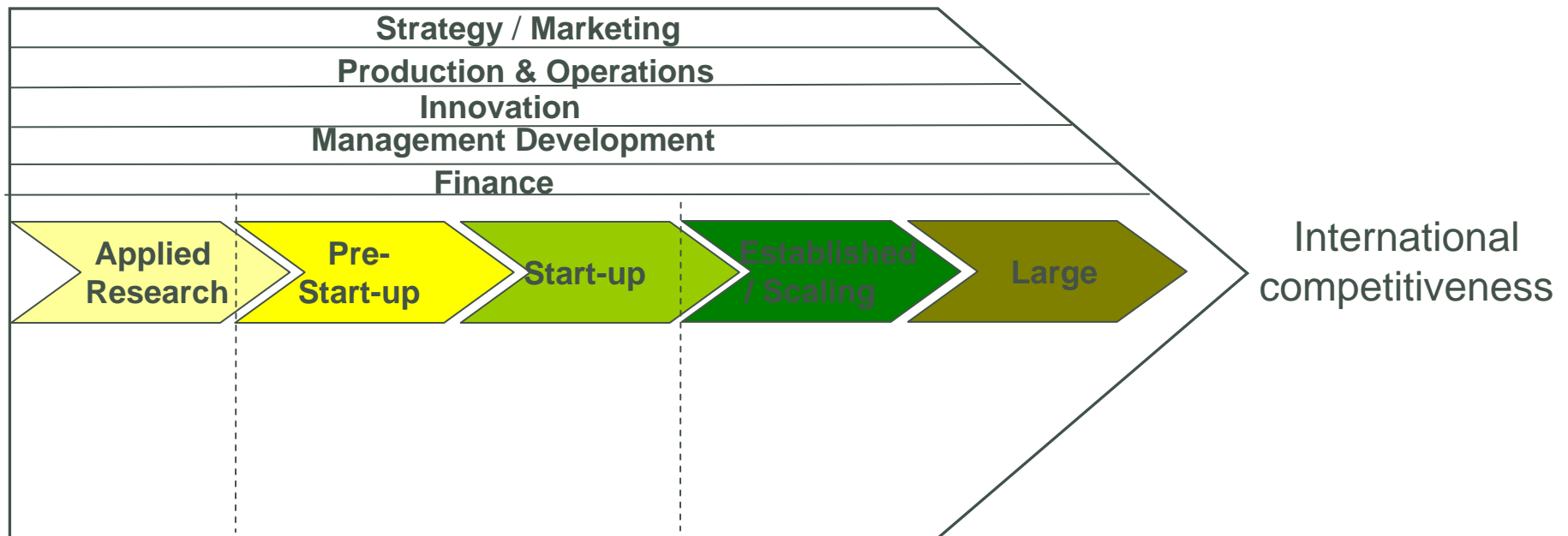
What can the State Do?

- Invest in Human Capital
- Entrepreneurial education
- Focused support for research
- Provide framework for commercialisation of research
- Leverage venture capital
- Provide favourable tax environment



Image: National Research Council Canada

From Research to Market – Building Indigenous Companies



- *Accelerate indigenous export growth for lifesciences– BD/partnering*
- *Develop platform for longer term growth*
- *Build innovation capability and linkages with 3rd level/Clinicians*
- *Develop leadership/management capability & international networks*



Ecosystem Development & Direct Sectoral Support



- **Research Funding**
- **Company investments**
- **Industry Led Collaborations**
- **Management & Entrepreneurship**
- **Technology Transfer Strengthening**
- **Incubators & Wet Lab Space**
- **Seed & Venture Capital Fund**
- **International Networks**
- **Export Market Access**

EI & Ecosystem Development



➤ Incubators & Wet Lab Space

- Bioincubator Programme
- Wet Lab Space

➤ Seed & Venture Capital Fund

- €175M leveraged >€800M

➤ Management & Entrepreneurship

- Leadership for Growth
- Business Partners

➤ Technology Transfer Strengthening

- Boost TTO infrastructure

➤ *Other factors.....fiscal, legal*

EI's Direct Sectoral Support ENTERPRISE IRELAND

➤ **Research Commercialisation**

- Targeted investment in research with commercial potential
- €60M lifesciences portfolio – licences & spin-outs

➤ **Company Specific Funding**

- Start-up, expansion, R&D, HRD

➤ **Industry Led Collaborations**

- Project (IPP) – Programme (ILRP) – Centre (CC)

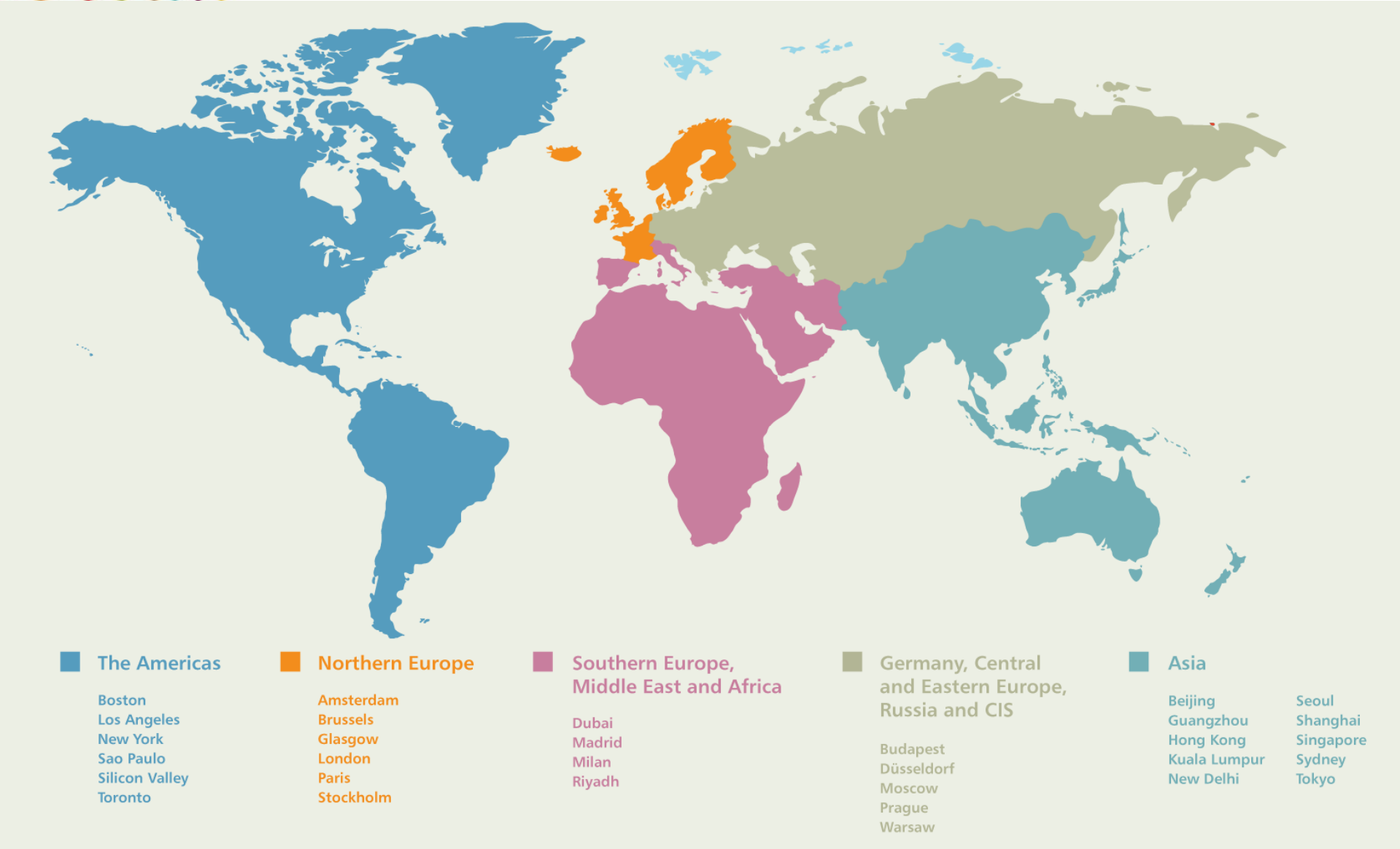
➤ **International Networks**

- Cleveland Clinic, NIH, USDA, BioLINK, Techlink

➤ **Export Market Access....**

International Sales & Partnering

33 Offices Globally





The Irish Times - Wednesday, February 18, 2009

Opsona gets €18m in biotech funding



Alimentary Health's Probiotic Technology Launched Nationwide in the US

PR Newswire May 11th, 2009



Merrion signs deal worth up to €350m with Novo Nordisk

Irish Independent Tuesday November 25 2008

Thank You!

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