Life Science and Technology

Innovation in Scotland

Mr Yasutsune Kanatani
Scottish Development International

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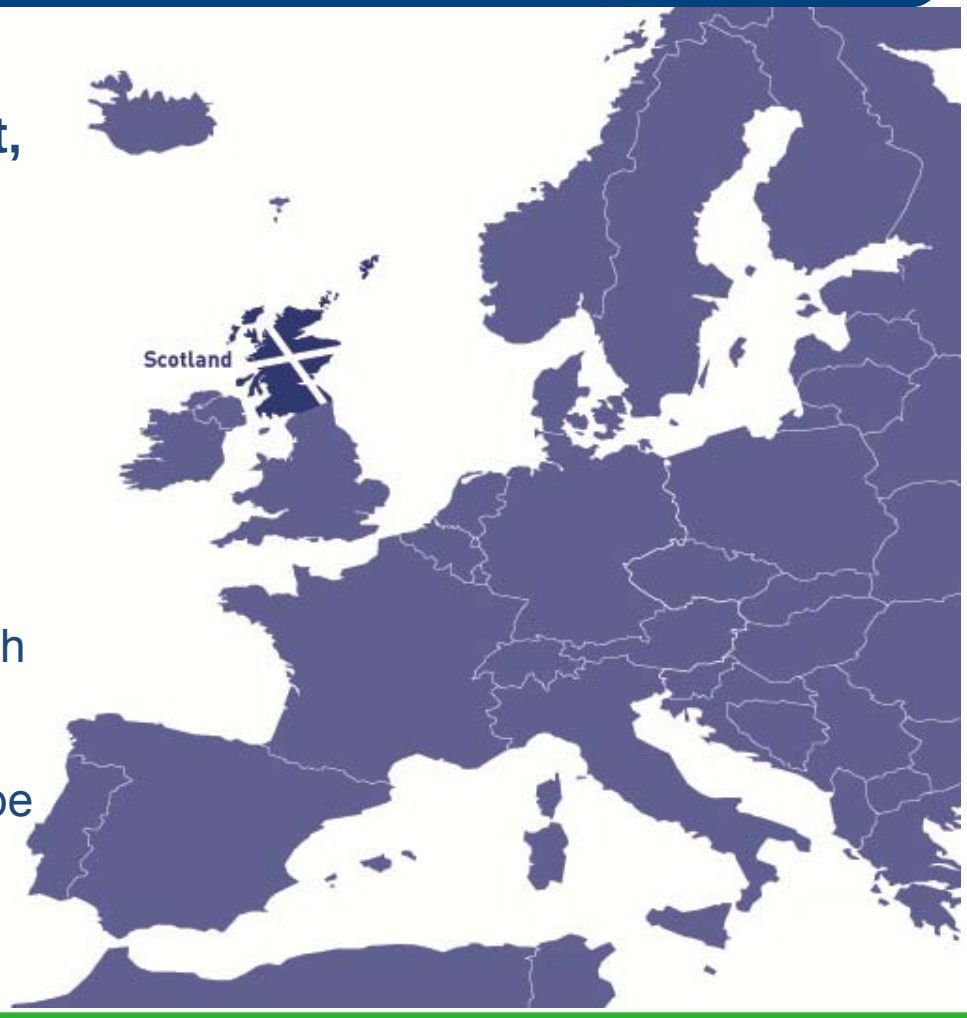
Scotland

From our people to our quality of life, there are many reasons companies choose to start, grow and invest in Scotland:

- 5.3 million people - 8.3% of UK (2012) and a stable population
- Well connected (exchange of knowledge, transport of people and shipment of products) and supportive environment
- Foreign investment in Scotland stands at a 15 year high 10.9% of all UK FDI projects
- Most medical research per head of population in Europe
- Strong history of medical innovation and scientific discovery



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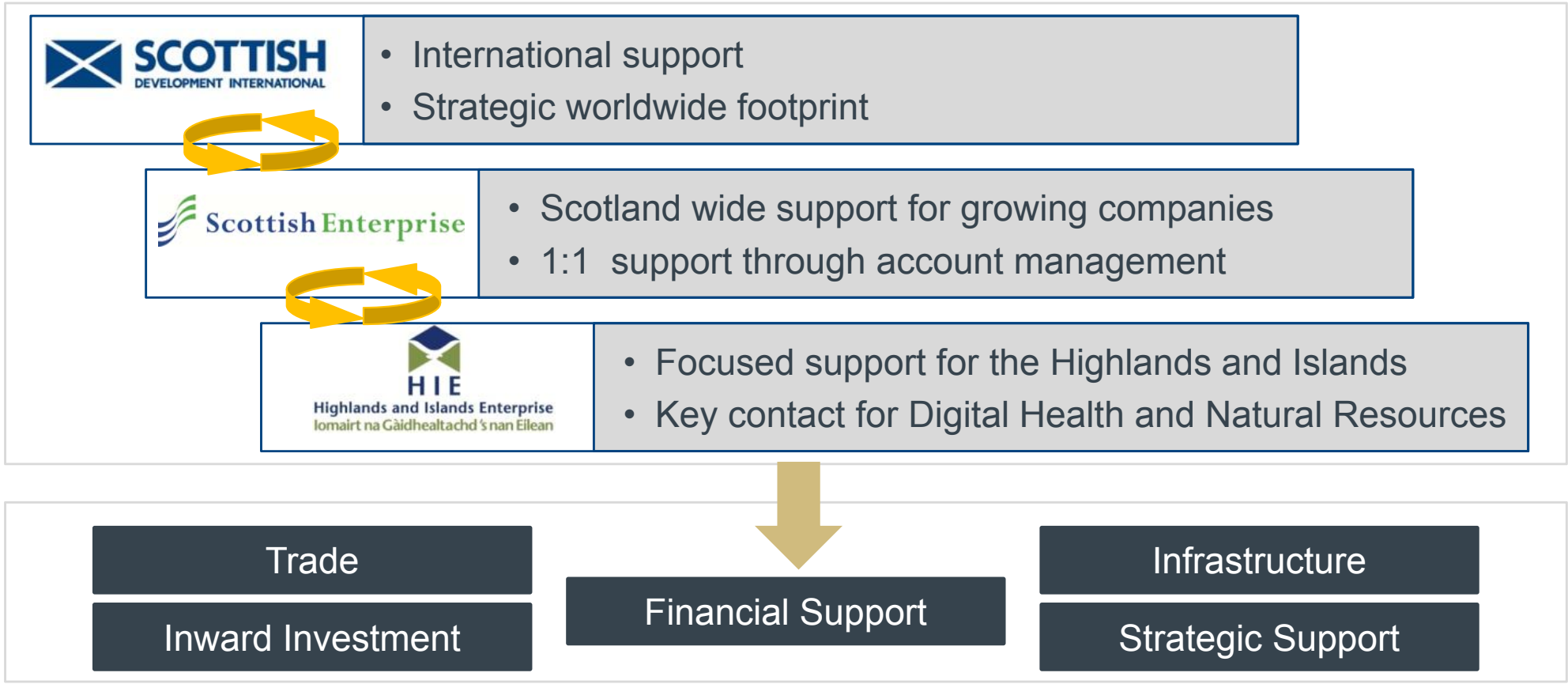
Relationship Model

Support for Scottish companies operating in national and international markets



Supporting Company Location

SDI actively manage relationships with more than 400 inward investors in Scotland to nurture & build on the 150,000 jobs they provide

Investment Incentives	Grants	Tax Incentives
• Regional Selective Assistance • Equity Funding	• R&D Grant • Additional Innovation Grants	• Tax Credits • Patent box

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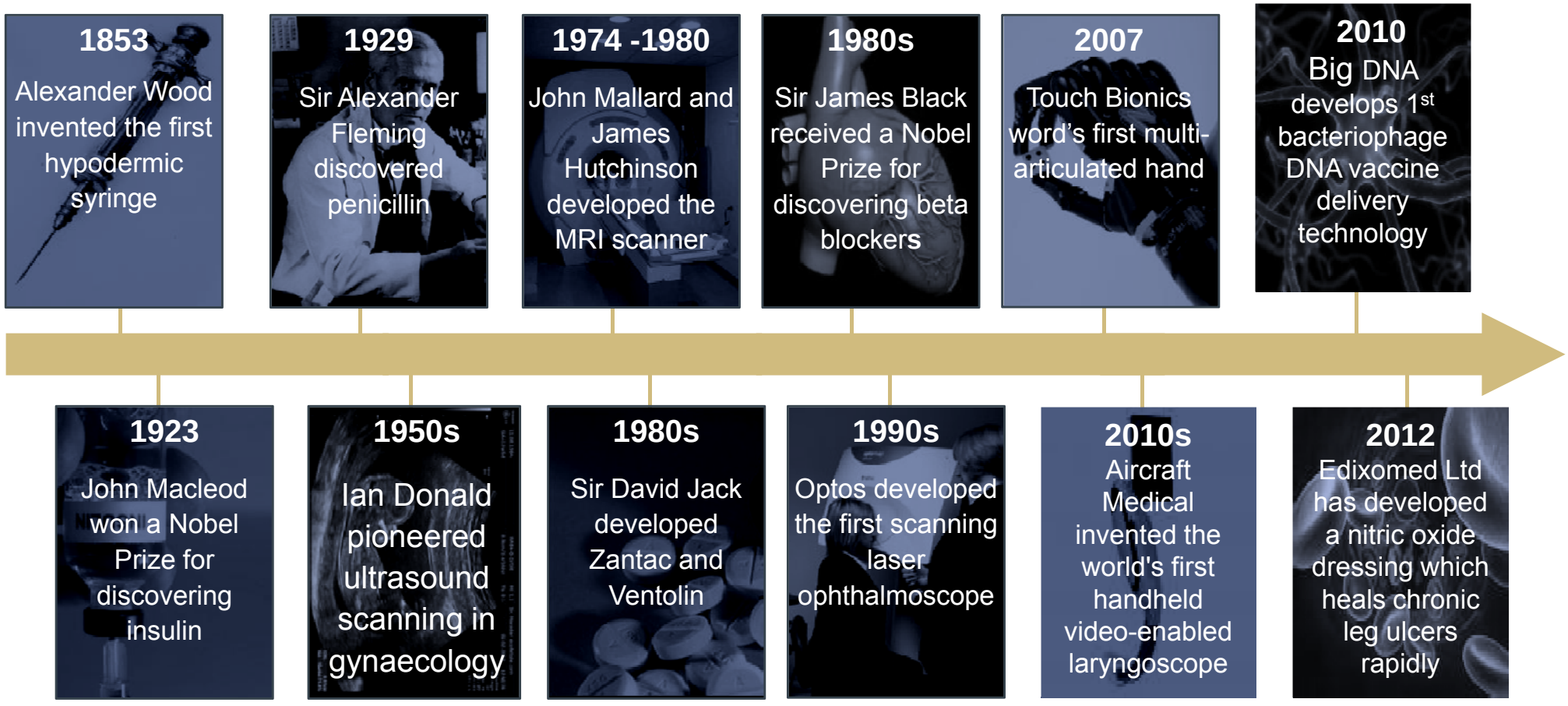
A History of Innovation

Scotland has a strong track record of Innovation



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Life Sciences Landscape

NHS Scotland
a single healthcare system

over **170** core **medical device** companies

cluster of **world class** researchers and clinicians

Life Sciences in Scotland

Cradle to Grave
single medical record

Growing **Digital** and **Connected Health** capabilities and assets

a **world leading** centre for **stem cell research** & **regenerative medicine**

More than **30,000** employees in over **600** organisations

Over **160** **pharma services** companies

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Innovative start ups to major global players

Areas of Strength

Scotland hosts one of the most sizeable Life Sciences clusters in Europe

Medical Technologies	Pharma Services	Regenerative Medicine	Connected Healthcare	Precision Medicine	Animal Health
					

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Pharmaceutical Services

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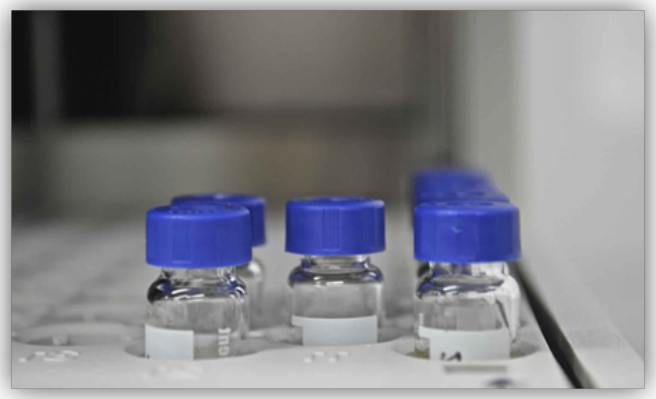
Drug discovery excellence in Scotland

Drug Discovery

Scotland has world class discovery consortia involving the world's biggest pharmaceutical companies

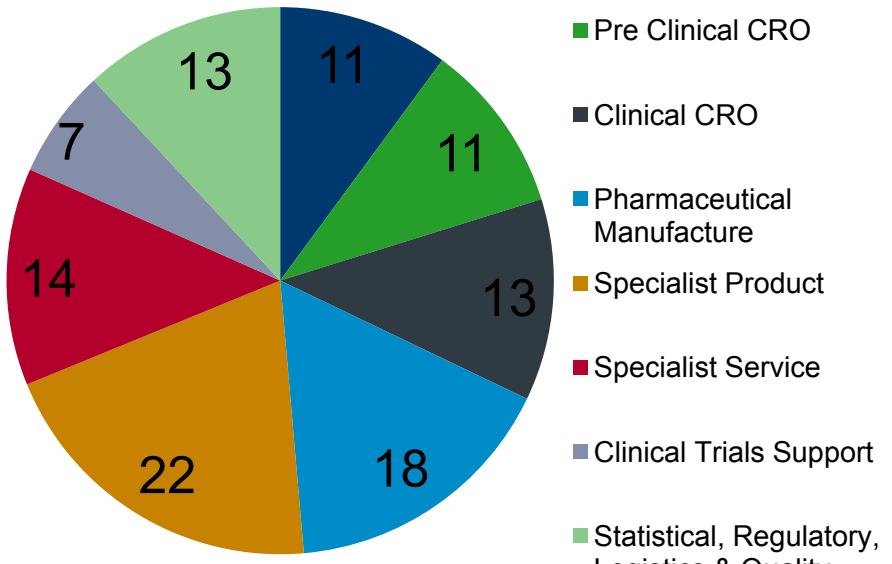


- Scotland has a history of **drug discovery excellence** and Scottish scientists**:**
  - Discovered world's first vaccine against viral Hepatitis B
  - Awarded Nobel prize for discovering beta blockers
  - Discovered Atracurium, the world's best-selling muscle relaxant
  - Discovered Salbutamol, the world's best-selling asthma treatment
  - Discovered Zantac for peptic ulcers
- Innovative discovery assays supporting **early lead identification and validation**
- Host to **Joint European Compound Library** and **European Screening Centre,** part of £100m EU project

Strengths of pharmaceutical services in Scotland

- **More than 160 companies** employing over **9,000** people with a turnover of **£1.2bn**[1]
- Global CROs and specialist service providers ensure **a comprehensive supply chain** across all stages of drug discovery and development
- **60% of Europe's biopharmaceutical safety testing** is carried out in Scotland[2]
- Preferred clinical trial site for **Pfizer, PPD, Quintiles and Roche**
- Global leaders in pharmaceutical manufacture **AMRI, BASF, Capsugel, GSK and SAFC** recognise the advantages of operating in Scotland
- Refined testing and manufacturing expertise in **fast-growing ADC market**

% of Pharmaceutical Services Sector by Company Capability



[1] *Internal analysis 2014*

[2] *Biopharmaceutical drug development capabilities: Benchmarking Scotland's position versus key markets, Evolution LS 2010.*

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A comprehensive supply chain in Scotland

Scotland's Pharmaceutical Services sector incorporates every stage of the complex and diverse drug discovery, development and manufacturing process

Scotland fulfils all stages of drug development

Service & Product Innovation

Tissue provision, discovery tools, specialist imaging analysis services, regulatory consultancies, data management, supply chain logistics, data analytics etc.

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Scotland delivers across all stages of drug development

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Innovative and expert pre-clinical testing in Scotland

Preclinical CROs

60% of Europe's preclinical testing of biopharmaceuticals is carried out in Scotland

- **Global leaders in preclinical contract research** are based in Scotland such as Bioreliance, BioOutsource and Charles River Laboratories
- Niche expertise in companies such as Biopta, Tissue Solutions and Clyde Biosciences provide **innovative solutions to pre-clinical efficacy and safety testing**.
- **Diverse Capabilities** including investigative toxicology, safety evaluation, laboratory sciences and expert in-vivo scanning and imaging capabilities
- **Bespoke testing and formulation expertise** in fast-growing ADC market

Globally competitive clinical research in Scotland

Clinical CROs

Scotland is one of the top 5 sites world wide for recruitment and start up times.

- **Preferred clinical trial site** for Quintiles, PPD and Pfizer
- **Managed clinical trial delivery** through NHS Research Scotland
- **Globally Competitive** trial recruitment and start-up times (commercial approval 20 days)
- **A unified health provider (NHS)** with outstanding collaboration across academia government and industry and a **unique patient identifier number** (CHI) used from cradle to grave creating a unique environment for data driven clinical research
- **Access to Clinical investigators and patients** across all major therapeutic areas including diabetes, oncology, dementia, MS and stroke
- **A clinical CRO company base** that can support Phase I to IV clinical trials and post-market surveillance.

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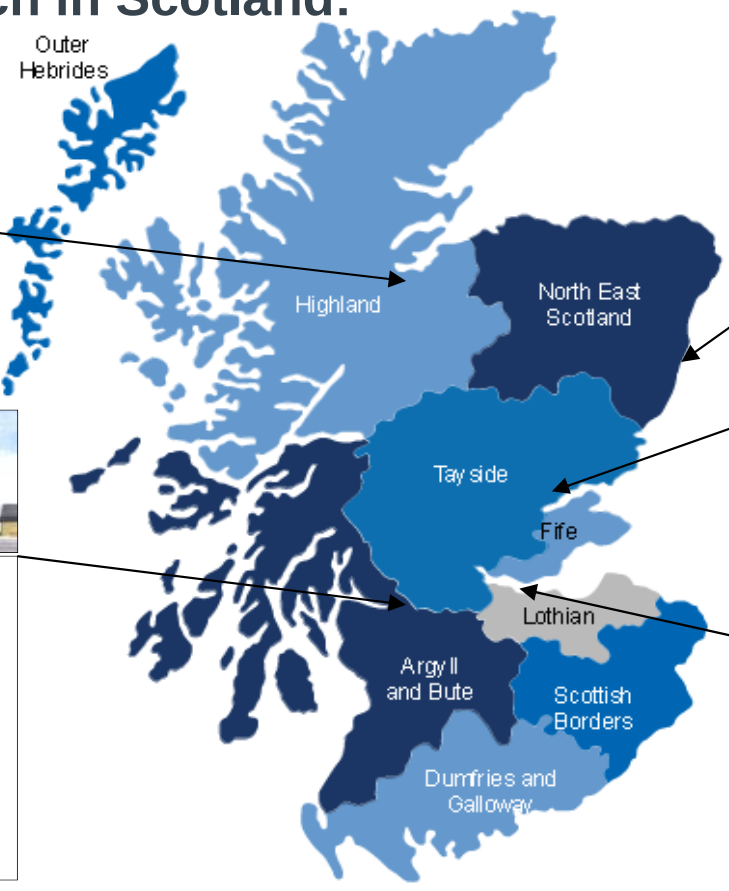
Globally competitive clinical research in Scotland cont.

Streamlined process for feasibility and to obtain R&D permission for multicentre research in Scotland:

Inverness
Highland CRF
Lipidomics Research Facility
Highland Surgical Research Facility

Glasgow
Biomedical Research Centre
Glasgow Clinical Research Facility (multiple hubs)
BHF Cardiovascular Research Centre
CRUK Beatson Institute
Beatson Oncology Centre
MRC Social and Public Health Services Unit
Sackler Institute



Aberdeen
NRS Permissions Coordinating Centre
Institute of Medical Sciences
Institute of Applied Health Sciences
Aberdeen Clinical Research Facility
Health Services Research Unit
Health Economics Unit

Dundee
CRUK Laboratories
Dundee Clinical Research Facility
Health Informatics Centre
Medicines Monitoring Unit

Edinburgh
Edinburgh Bioquarter
Wellcome Clinical Research Facility
Queen's Medical Research Institute
Institute of Genetics and Molecular Medicine
(MRC/CRUK/UoE)
Edinburgh Neuroscience
Farr Institute

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Innovative manufacture and drug delivery in Scotland

Pharmaceutical Manufacture

Global leaders in pharmaceutical manufacture recognise the advantages of operating in Scotland

- **30 dedicated** pharmaceutical manufacture and speciality formulation companies located in Scotland
- **Improved cost efficiencies** through widespread lean processes.
- **Strong compliance** badging and supply security
- **Global top two** universities for pharmacological research
- **Innovative** manufacture solutions such as XstalBio and Solid Form Solutions providing **bioformulation** and **complex delivery expertise**.
- Industry leaders AMRI, BASF, Capsugel, GSK and SAFC recognise the advantages of siting **global operations in Scotland.**

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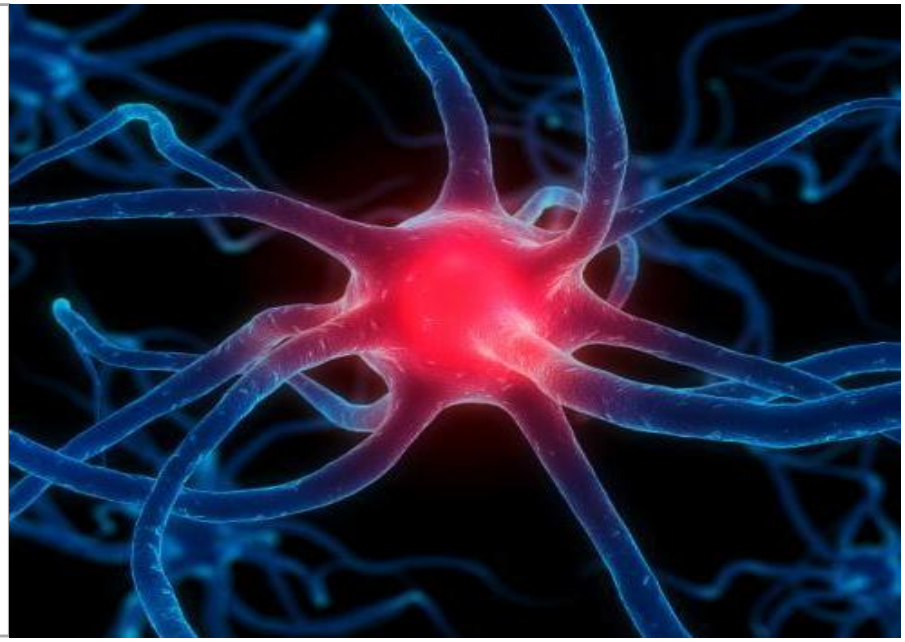
Diverse and expert products and services in Scotland

Specialist Service + Product Innovation

Excellent transport links with reliable courier services delivering to most of Europe within 24 hours.

- Deliver to most European destinations **within 24 hours**; Scotland's dominance in preclinical testing in Europe is reflected in Scotland's specialised logistics network
- **Over 50** specialist service and product companies including data analytics, imaging analysis, drug discovery platforms, clinical trial packaging, quality management systems, regulatory consulting, tissue procurement, genetic testing
- Reliable **supply chain logistics**
- **Comprehensive bio and health informatics** infrastructure and existing company base

Regenerative Medicine



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Stem Cells and Regenerative Medicine: Vision

Our vision is for Scotland to be Europe's leading location for the development of stem cell applications, and to establish the optimum environment for translating research into therapeutic benefits for patients.

Scotland's reputation as one of the leading locations for the development of new tools and technologies, as well as the clinical assessment of new cell-based therapies, is due to:

- **its connectivity**
- **its comprehensive translational, clinical, analytical and regulatory support mechanisms.**

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Scottish Government Investment

Scotland is one of the world's leading locations for stem cell the Scottish Government has, since 2004, invested over £100 million across various interventions to help translate this expertise into applied medicine and practice

Innovation & Infrastructure		Funding	People	Promotion
Manufacturing: Roslin Cells	Scottish Centre for Regenerative Medicine	Scottish Enterprise & MRC Cell Technology Translational Fund	Skills Development Scotland – Life Sciences Skills Investment Plan	International Promotion
Manufacturing: Blood Cells	Manufacturing: Cell Lines for Pre-Clinical Use	Scottish Enterprise & UKSCF Cell Therapy Translational Fund	Attracting Talent for Scottish Centre for Regenerative Medicine	International Collaborations & Partnerships

Centre for Regenerative Medicine

Scottish Enterprise

UK STEM CELL FOUNDATION

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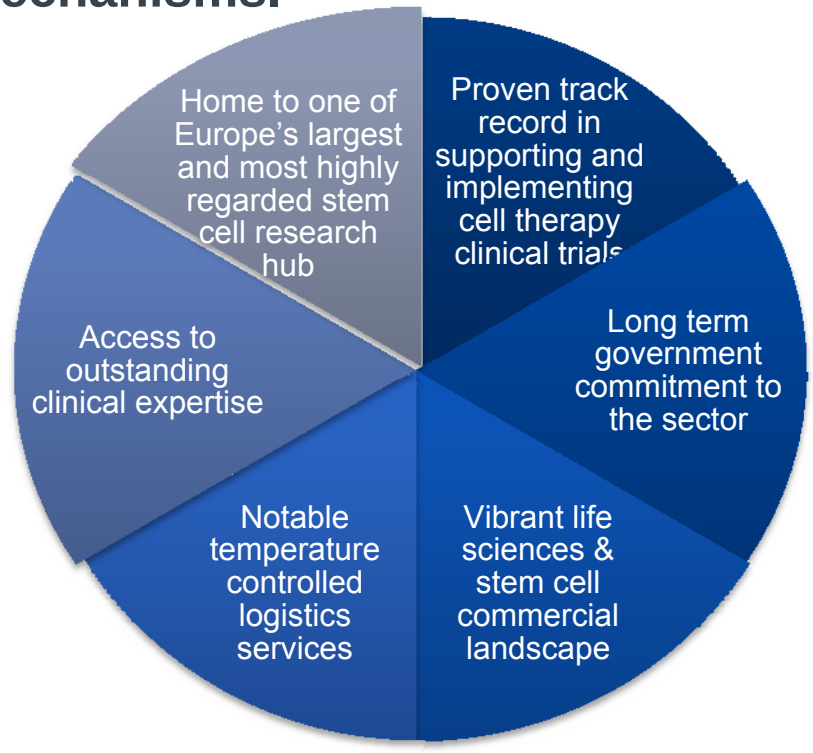
Scotland’s Stem Cell Cluster

“Scotland's reputation as a leading location for the development of new tools and technologies, as well as the clinical assessment of new cell-based therapies, is due to its connectivity and to its comprehensive translational, clinical, analytical and regulatory support mechanisms.”

Over the last ten years Scotland has:

- Capitalised on its world-leading research expertise in stem cells
- Invested in the infrastructure and commercial support necessary to create a viable industry cluster and
- Created a strong supply chain as well as strong inclusive and collaborative community.



http://www.lifesciencesscotland.com/solutions/scotland's-strengths/stem-cells.aspx

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Stem Cells Commercial Landscape

	R&D	Pre-Clinical	Phase 1	Phase 2	Phase 3+	Launch Product
Therapeutics & Manufacturing	TC BIOPHARM, Roslin Cells, Scottish National Blood Transfusion Service					
Drug development, Tools & Services	FibromEd, Clyde Biosciences, sb Drug Discovery, biopta human tissue services, Ubiquigent, Collagen solutions, Tissue Solutions™ Working with you, for you...					
Enabling technologies & Contract Research	charles river, bio outsource Global biotesting soluti, Vitrology, Deliverics, Pharmacells, R BIOMEDICAL, ingenza, avanticell science, antoxis, TEPNEL Pharma Services, biogelx, BioReliance Clearance Services, Sistemic, Onorach, HYALTECH, life technologies					
Regulatory Advice & Guidance	vyvo Biosolutions, QPMED Global Ltd, R BIOMEDICAL, compliancepath Life Science Solutions, Gael, Scottish Medicines Consortium, AptivSolutions, Scottish National Blood Transfusion Service					
Logistics	Catalent, Colpitts World Travel, World Courier, TNT					

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Successful Delivery of Cell Therapies

Scotland is one of Europe's leading locations for the development of stem cell applications.

Cell Therapies in Clinical Practice	Cell Therapies in Clinical Development		
Pancreatic islet programme representing 50% of UK islet transplants	Phase I CTX stem cell line for **critical limb ischemia**	Phase I/II CD133 cells for **chronic liver failure**	Phase IIb T-cell immunotherapy for **melanoma**
EBV Cytotoxic T lymphocyte (CTL) bank to treat patients with post-transplant lympho-proliferative disease including refractory EBV-driven non-Hodgkin's lymphoma	Phase I/II corneal epithelial stem cell transplant for **corneal blindness**	Phase I ReN001 neural stem cell therapy for patients left disabled by **ischemic stroke**	Phase II MultiStem for **ischemic stroke**

Scotland has significant expertise in regulatory approval & clinical trials

NHS SCOTLAND
NHS RESEARCH SCOTLAND

HEALTH SCIENCE SCOTLAND

SCOTTISH NATIONAL BLOOD TRANSFUSION SERVICE

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Regenerative Medicine at Edinburgh BioQuarter

The MRC Centre for Regenerative Medicine is a world leading research centre based at the University of Edinburgh, studying stem cells, disease and tissue repair to advance human health.

World Leading Research	• Scottish Centre for Regenerative Medicine - MRC Centre for Regenerative Medicine: • Pluripotency & iPS • Lineage & Cell Specification • Neural Differentiation & Tissue Repair (Brain & Spinal Cord) • Haematopoietic Stem Cell Biology & Regeneration (Blood) • Liver Stem Cell Biology & Tissue Repair
iPS Cell Bank	• Roslin Cells Leads European iPS Cell Bank • €35 million project • European consortium of 26 partners including Neusentis/ Pfizer, AstraZeneca, H. Lundbeck, Janssen and UCB Pharma • Leading facility for storage and distribution of iPS cells
The Niche	• £25M Regenerative Medicine Platform funding to boost the development of regenerative medicine therapies • £5M for Edinburgh Stem Cell Niche Hub • £10M for Edinburgh Computational and Chemical Biology of the Stem Cell Niche
Cell Therapy Manufacturing	• Roslin Cells & SNBTS • 6 Cell Therapies Manufactured at EBQ including cell therapies for • Pfizer/Neusentis & Reneuron

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Medical Technologies

Scotland's Multinational Medtech Companies

A number of companies have grown in Scotland to become global players based on Scottish innovation/IP

Toshiba Medical Visualisation Systems Europe

- Voxar : Founded early 1990s
- Powerful 3D CT, MR imaging software
- Nov 2008 – acquired by Toshiba
- Based in Edinburgh

LifeScan Scotland

- Created in 2001 when Johnson & Johnson acquired Inverness Medical Ltd.
- Employ over 1,000 people
- Main area of interest:diabetes.
- Main product is the OneTouch® Brand of blood glucose monitoring systems

Optos Plc

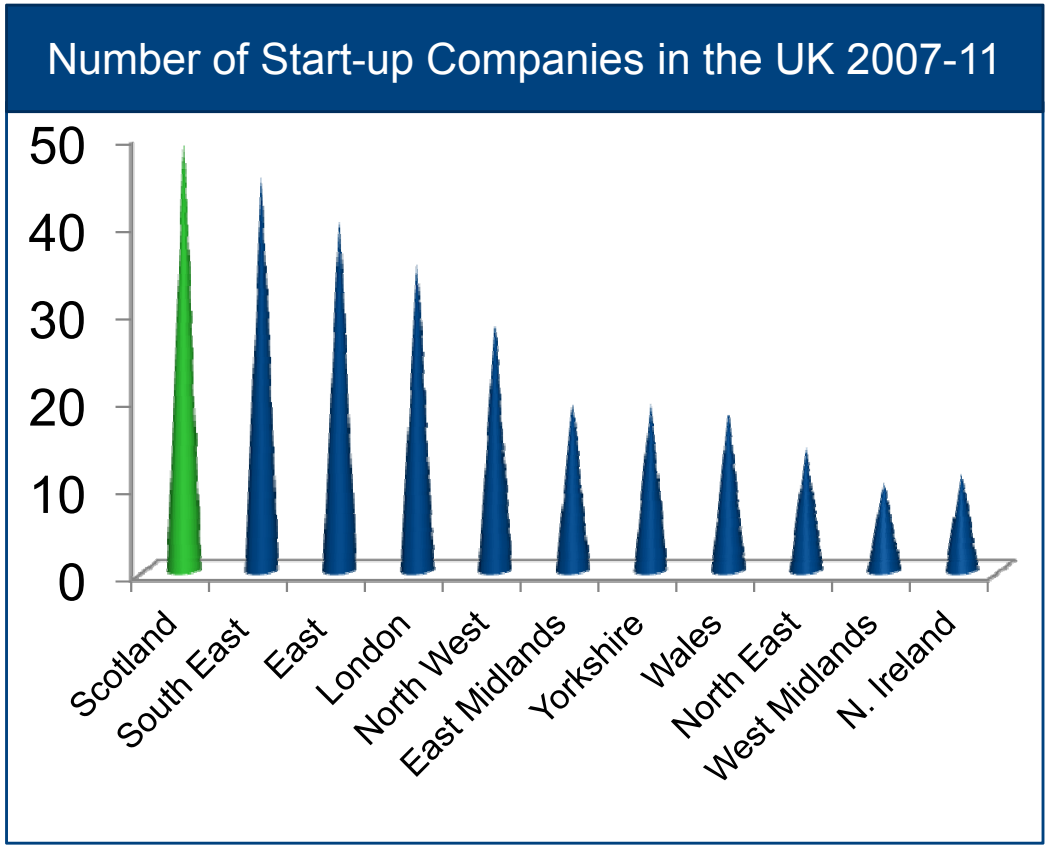
- Founded in 1992
- Scanning laser ophthalmoscope - captures a digital ultra wide-field image of the retina in a single take
- Over 33 million eye performed examinations so far, $196m turnover in 2012

Vascutek Terumo

- Founded 1982
- Develop and manufacture vascular implants
- Growth fuelled by strong R&D capability most recently in endovascular area

Innovative Start-ups

Scotland is the UK's leading location for Life Sciences Start-ups



Approx half of all life science start ups from 2005-2009 were Medtech focused (approx 22 in total).

Medtech Start Ups

- Ambicare
- Mode Diagnostics
- Reactiv Lab
- Ohmedics
- Vueklar
- i2eye Diagnostics
- Taragenyx

UK Life Sciences Start Up Report 2010 and 2012, Mobius Life Sciences

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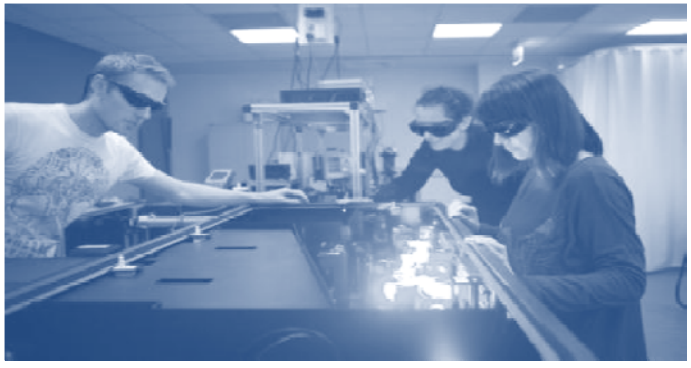
Academic Research in Medical Technologies

Scotland's research base offers easy access to a wealth of world-class, expertise and facilities as well as depth of relevant experience in convergent technologies critical to development of modern medical technologies

- Scotland's 15 universities are all involved in ground-breaking med-tech research
- Centres of excellence:
  - Strathclyde Institute for Medical Devices
  - Institute for Medical Science and Technology in Dundee
- University pools are gateways to academic excellence
- Strathclyde Medtech: Strathclyde Institute of Medical Devices is running a supporting scheme for industry and academia collaboration

SINAPSE

SUPA



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Commercial innovations

Scotland has an impressive track record of medical innovations:

In the past decade, Scotland's medtech companies have launched global health innovations including:

- A portable unit to treat non-melanoma skin cancer using photodynamic therapy – Ambicare
- The first scanning laser ophthalmoscope to provide enhanced clinical information to detect diseases of the retina - Optos
- The world's first commercially available multi-articulated prosthetic hand – Touch Bionics
- A hand-held light-based device for checking breast health – PWB Health
- The world's first handheld video-enabled laryngoscope to facilitate intubations – Aircraft Medical






optos
ambicare Health
pwbHealth innovations for personal wellbeing
touch bionics
AIRCRAFT MEDICAL

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Connected Health

Connected Health

Outstanding level of collaboration between industry , universities, NHS and Government – open innovation environment

Industry collaboration is a key part of the vision in creating a world leading R&D environment to develop informatics based healthcare solutions of the future.

Strong Academic And Commercial Base

- Scotland is building on a strong academic and commercial base in informatics to develop work class infrastructure to support the continuing move towards a connected and personalized healthcare environment.

Stable Population

- In comparison to rest of UK and US populations, Scotland has an incredibly stable population. It has cradle to grave patient records underpinned by the Community Health Index (CHI) number; the only unique patient identifier for Scotland assigned to everyone who is registered with a GP practice.

Centralised Healthcare Provider

- A centralised healthcare system- including a national Picture Archiving System (PACs)- and a high incidence of morbidity of common complex diseases.

These elements make Scotland well differentiated to develop new solutions for healthcare based around informatics, big data and patient stratification.

Connected Health

Continuing to develop and build upon current strengths and expertise:

Scottish Health Informatics Programme (SHIP)	• $6.4m collaboration of four Scottish universities and the NHS to deliver improved infrastructure and governance for research using linked health records in Scotland.
e-Health Informatics Research Centre (e-HIRC)	• One of 4 UK e-health informatics research centres with Scotland's centre leading the UK-wide network.
Health Informatics Research Advisory Group (HIRAG)	• Developing a national strategy for health and bioinformatics research in Scotland.
The Farr Institute	• Investment builds on the e-HIRCS to strengthen the UK's capacity to analyse patient records and health data in safe environments.
Scottish Informatics & Computer Science Alliance (SICSA)	• This university research collaboration that allows companies to engage with 10 of Scotland's software universities via one access point.
Significant Academic Expertise and Growing Company Base	• e.g. Aridhia, OracleBio, Pharmatics Ltd, Toshiba, Craneware

Digital Health in Scotland

“Scotland has a highly collaborative Telehealthcare community drawing together leading academics, policy makers, multinational companies and a globally admired National Healthcare Service”. [1]

- Strong government push, favourable environment (policy & financial - £98M pa)
- Scotland will integrate health and care – led by NHS24 (different to England and Wales)
- A total investment of up to £23 million is being made in the UK-wide DALLAS programme – Delivering Assisted Living Lifestyles at Scale. This comprises an £18m investment by the Technology Strategy Board and the National Institute for Health Research, with a further £5m contribution from the Scottish Government, Highlands and Islands Enterprise and Scottish Enterprise.
- CHI Number: Anonymised electronic patient health information
- Around 100 Scottish companies active in this space
- Recently launched Digital Health Institute

DIGITAL HEALTH & CARE INSTITUTE

Innovation Centres

- Ageing population
- Rise in long term conditions and co-morbidity
- Health Service Constraints
- Personalisation of Medicine
- Low carbon economy

[1] George Crooks OBE, Medical Director NHS 24

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Digital Health Cluster

A highly networked, innovative community of pioneers from business, academia and healthcare

- Rapid growth in activity with a world-class pool of skills and talent
- A highly networked, innovative community of pioneers from business, academia and healthcare with a fully representative supply chain
- At Scale Deployment: One of the world largest deployments of digital healthcare is under way (initiated in 2012).
- New national Innovation Centres in digital health, stratified medicine and sensors

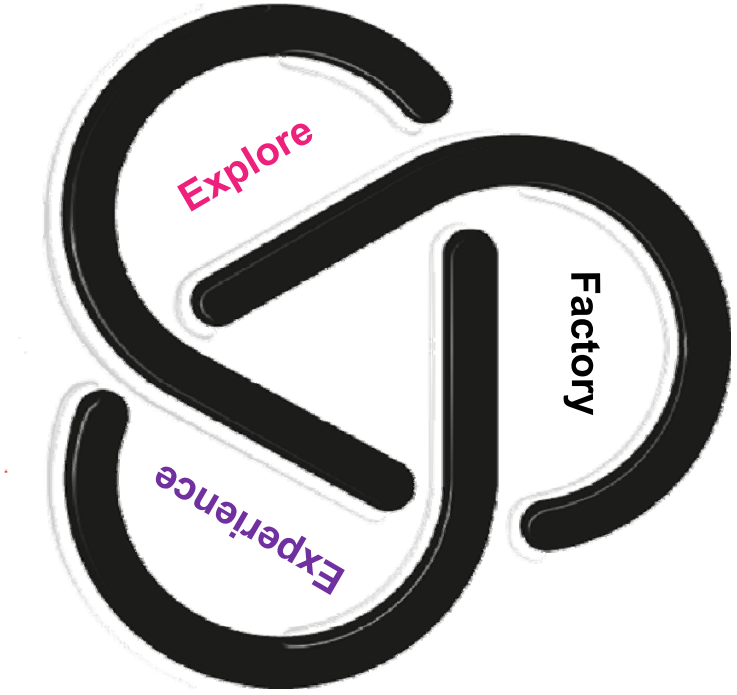
The Digital Health Institute

Mission: To develop products and services that will result in a step change in health and care delivery

DIGITAL HEALTH & CARE INSTITUTE

Innovation Centres

- Enable collaboration between industry, National Health Service (NHS), care, academia
- Agile design processes to assist product development
- Trials and evaluation facilities
- Open to all companies to participate



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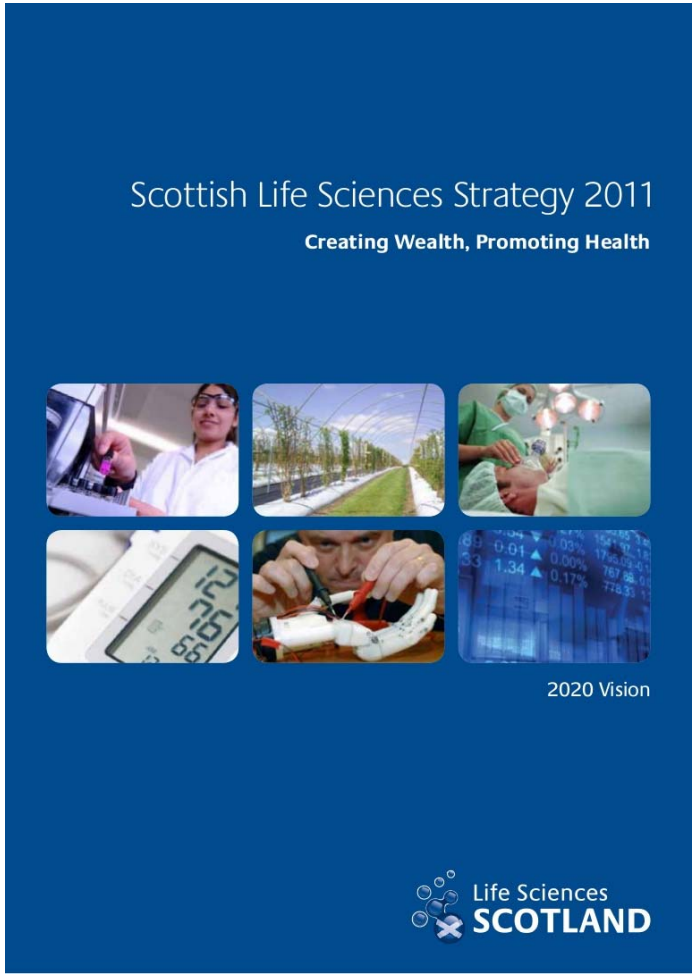
Working together to deliver solutions in Scotland



Life Science Advisory Board – Industry, Academia, NHS and Government

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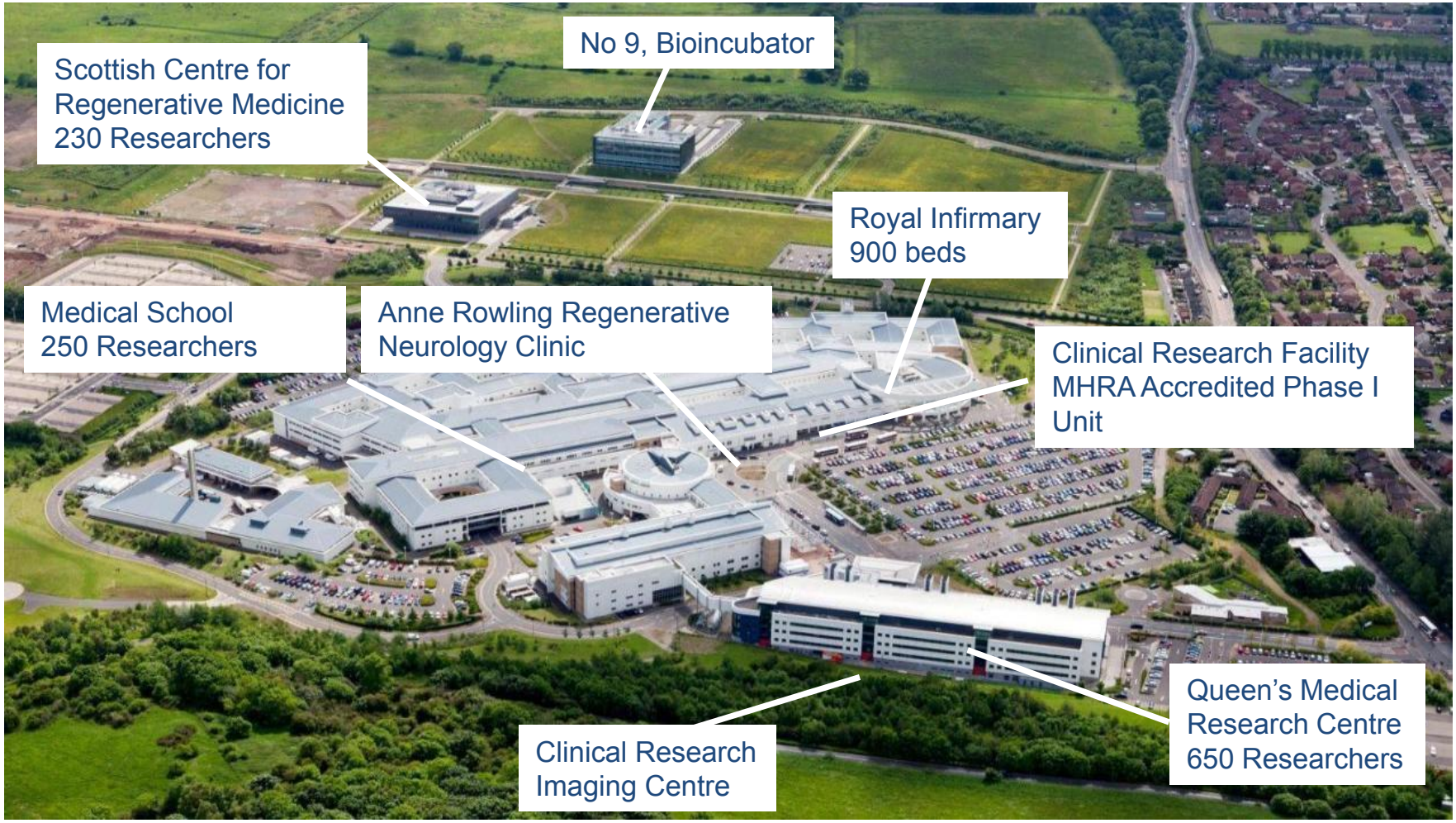
Edinburgh BioQuarter



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South Glasgow Hospital Campus

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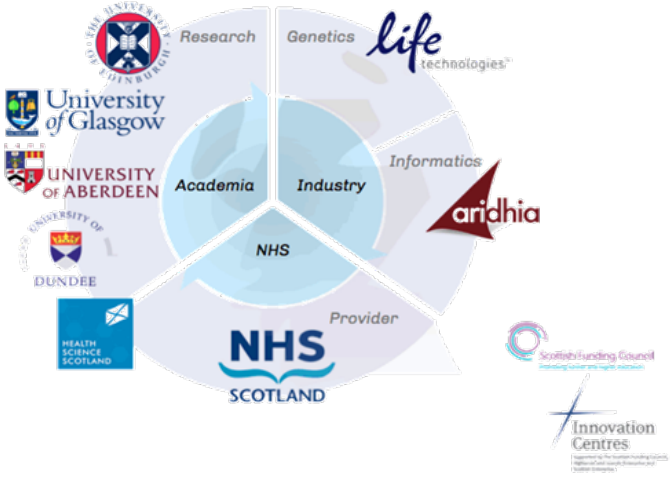
An Ethos of Innovation through Collaboration

SMSIC	• Stratified Medicine Scotland IC
DHI	• Digital Health IC
IBioIC	• Industrial Biotechnology IC
CMAC	• Cont. Manufacturing & Crystallisn
HIP	• Health Innovation Partnership
NRS	• NHS Research Scotland



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Joined up healthcare environment

A patient-centric, technology-agnostic future requires use of multiple biomarker types, access to retrospective/prospective database and clinical judgment

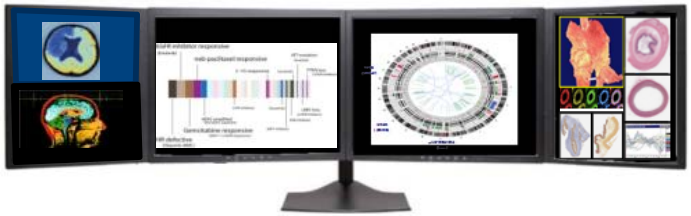
Farr Institute

Nationwide PACS

National patient e-records

Centralised healthcare

Clinical research infrastructure



Clinician Command Centre

Big data -IC

Sinapse (imaging)

Stratified medicine-IC

Digital Health-IC

BioQuarter

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有難う 御座います

arigatou gozaimasu

Thank you!

SCOTTISH DEVELOPMENT INTERNATIONAL

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Highlands and Islands Enterprise
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