

16 May 2018

UK BioIndustry Association

Influence, Connect, Save



Jane Wall, Director of Business Development and Membership Services, BIA

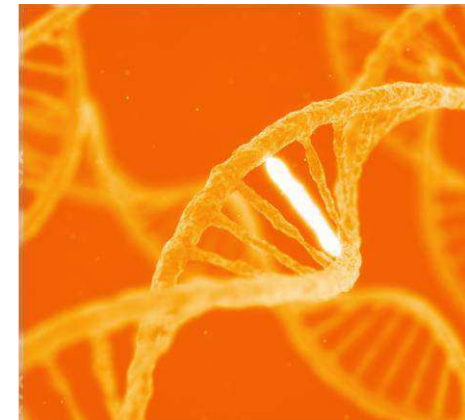
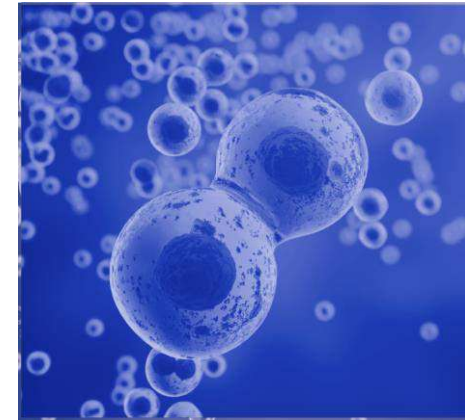
Introduction

As the national trade association for innovative life science companies in the UK we;

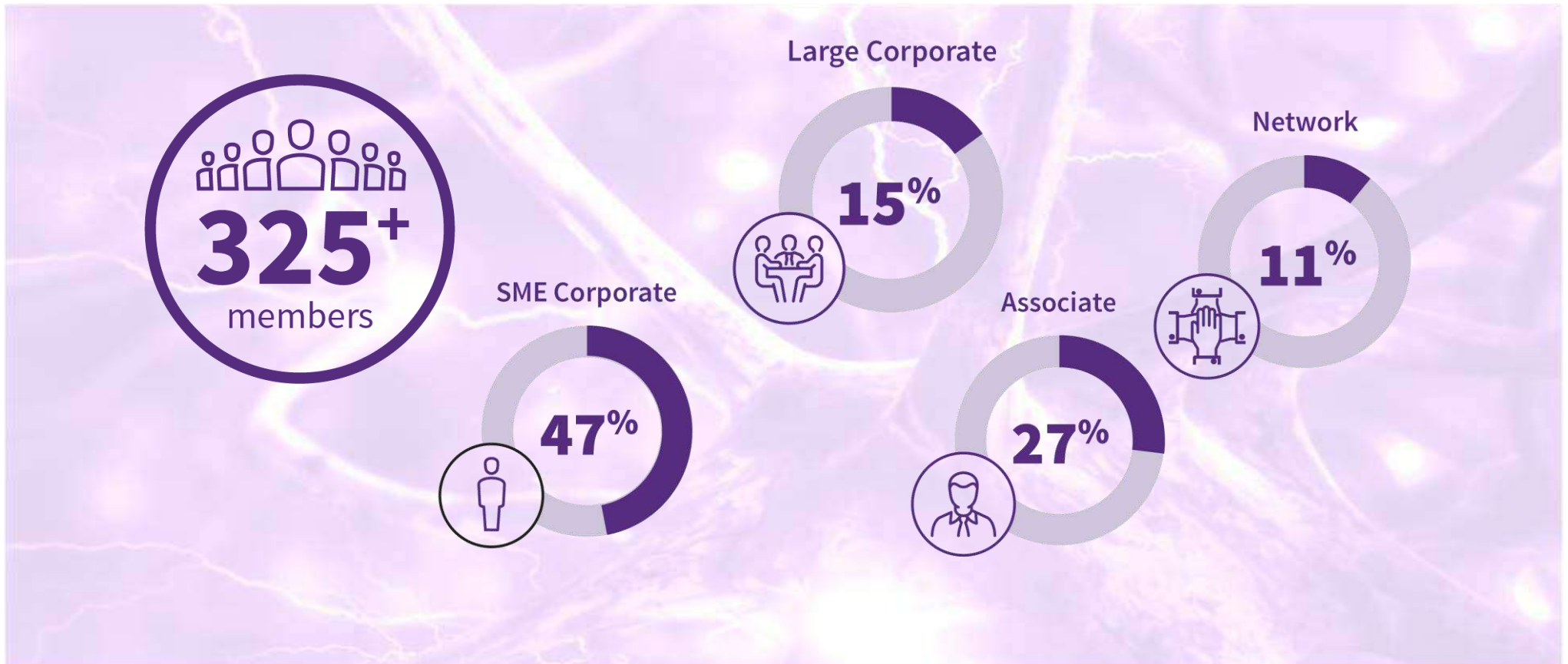
Influence policy ensuring our members voices are heard and represented on the matters that are critical for our sector's success

Connect the sector and grow networks through our industry-leading events and expert committees

Save our members significant amounts of money through the BIA business solutions purchasing programme.



Overview



How are the BIA different

Access to the Innovation Ecosystem



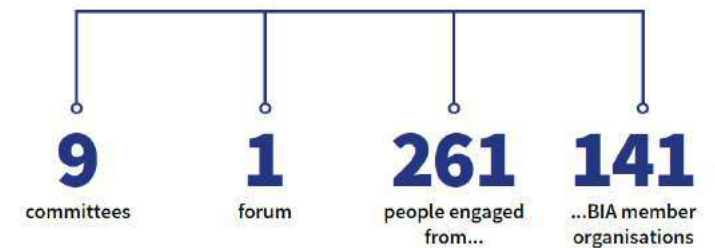
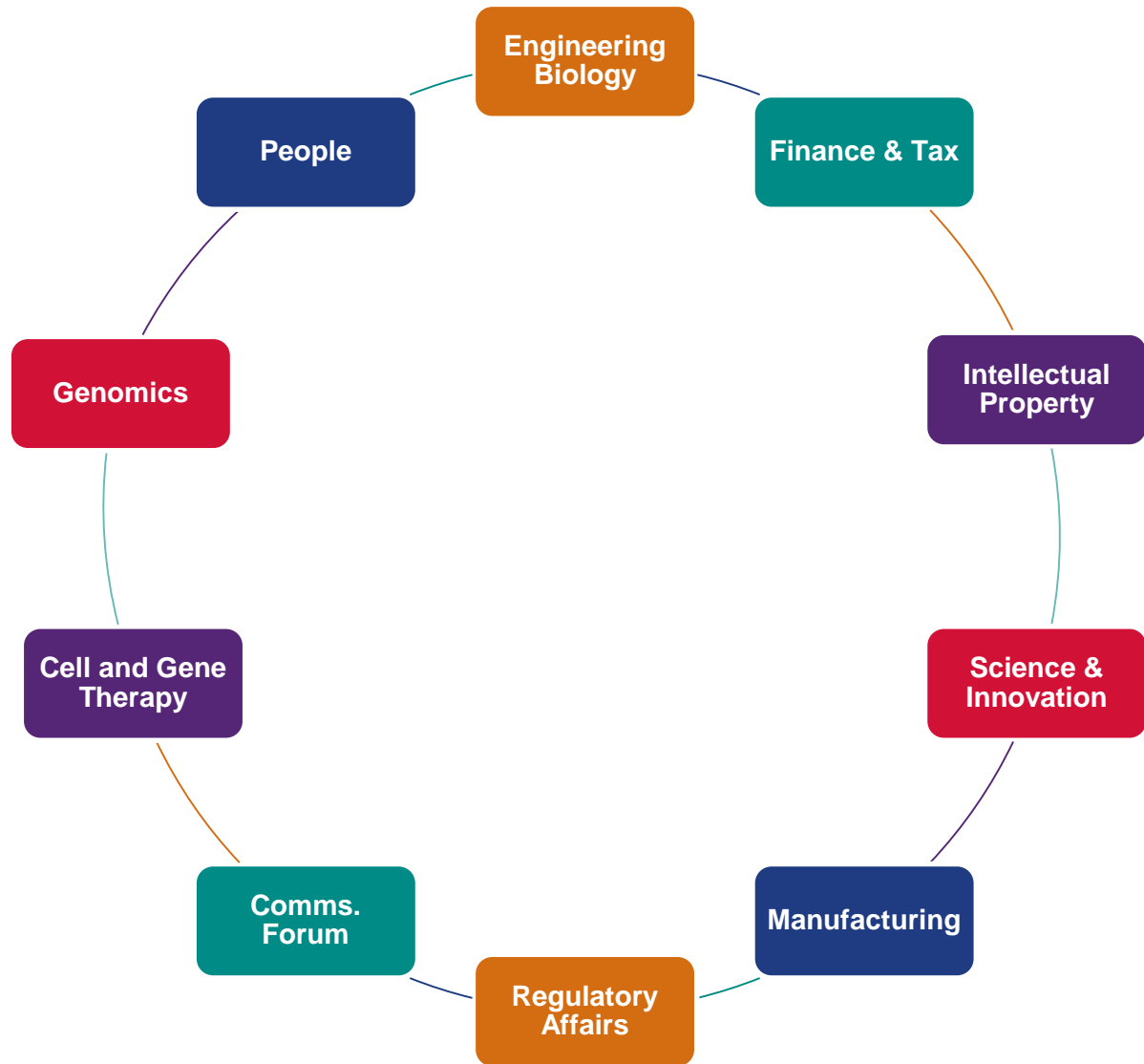
Influence, connect, save



Key Strategic Policy Areas



Advisory Committees



2018 Influence Priorities

Brexit

Industrial
Strategy

Patient
Capital
Review

Accelerated
Access

Celebrating
sector
success

International
Engagement

2018 – New Initiatives



PULSE

PULSE (Programme for Up and Coming Life Science Entrepreneurs) is a new, three day leadership and entrepreneurship training programme developed by the BIA and the Francis Crick Institute.

The programme is **for aspiring entrepreneurs and new CEOs** looking for advanced practical advice, support and feedback from leading entrepreneurs, renowned professionals and CEOs.



Rare Disease Industry Group

The RDIG will operate as a BIA working group which the BIA will run in-house. Key activities for this year will include:

- Continued focus on Highly Specialised Technologies (HSTs), but more strongly place this in the broader political context (i.e. Life Sciences Industrial Strategy, Brexit) and link across to the relevant issues in the rare disease area where appropriate.
- Core stakeholder engagement, including following-up meetings with key decision makers in NHS England and NICE and broader influencers
- Coordinating collective input into relevant consultations, inquiries and Parliamentary activity.
- Coordinating communications output of the group in response to/in anticipation of external developments.
- Providing a forum for information and intelligence sharing, including links into the European community/debate via BIA's membership of Europabio.

China Special Interest Group



The China SIG was set up with the China-Britain Business Council (CBBC), and supported by the Department for International Trade (DIT).

It aims to provide a discussion platform for BIA and CBBC members in the Biotech sector, exploring the opportunities for business growth in and with China, via trade and investment.



Influence, connect, save



Connecting to the Sector and Beyond

20

Media mentions:
a month average

6,540+

Twitter Followers

3,315+

YouTube views

8,260+

event newsletter
subscribers

130+

Blogs published
in 2017

UK's biotech sector raised twice as much through IPOs in 2017 than 2016

Share



Courtney Goldsmith
I am a journalist for City A.M. reporting on the Industrials sector, including o [...] Show more

Follow Courtney



The UK's biotech industry is poised for growth in 2018 (Source: Getty)

The UK's biotech industry ended last year with a bang, having raised more than twice as much money through initial public offerings (IPOs) in 2017 than the previous year.

A report published today by the BioIndustry Association (BIA) and data firm Informa Pharma Intelligence found IPOs by UK biotech companies raised £234m last year compared with £105m in 2016.



2018 Events so far

Gala Dinner



Women in Biotech Networking Evening



PULSE

Programme for Up and coming Life Science Entrepreneurs



Chief Medical Officer Summit



Flagship Events

📍 CEO and Investor
Forum



📍 Joint BIA/MHRA
Conference



📍 Women in Biotech



📍 Parliament Day



📍 UK Bioscience Forum



📍 bioProcessUK Conference



UK CEO and Investor Forum

23 – 24 May, De Vere Latimer Estate, Buckinghamshire

- Brexit and Industrial Strategy
- Patient Capital Review: unlocking pension funds to support the sector
- Approaches for effective discovery research and better translation
- Improving access for SMEs to the NHS ecosystem
- Cognitive and digital tech developments for increased ROI
- Financial strategies for global relevancy
- Tapping into China
- Finance trends, and 'what to expect'

Register today: www.ukceoandinvestorforum.org

BIA/ MHRA Conference 2018

Thursday 5 July, 30 Euston Square, London

The conference provides a great opportunity to discuss some hot topics and important developments of interest to the sector:

- Brexit: Business continuity planning and the UK regulatory environment
- Working together in the accelerated access pathway for breakthrough therapies and technologies
- Drug device combinations – Supporting innovation and addressing regulatory challenges
- Real world evidence – Sources for data collection and role in regulatory decision-making

Register today: <https://www.biamhraconference.org/>

Regional Events

- 1 5 & 19 February**
London, Brexit Seminars
- 2 1 March**
Glasgow, Regional networking lunch
- 3 21 March**
Babraham, VWR's Defining the Biotech Lab of the Future
- 4 22 March**
Babraham, Regional networking breakfast
- 5 11 April**
London, Regional networking breakfast
- 6 21 June**
Nottingham, Regional networking lunch
- 7 6 September**
Stevenage, Regional networking lunch
- 8 4 October**
Oxford, Regional networking lunch



Over 700 attendees at our regional events last year.

They are a crucial mechanism to profile local success and innovation, build networks and foster new collaborations.

Networks



2,180⁺
webinar
attendees

2,380⁺
delegates
(physical)

4,560⁺
webinar and physical
delegates combined


6 locations
London, Cambridge,
Oxford, Glasgow,
Manchester, Cardiff

38
events

8,260⁺
event newsletter
subscribers

“You get some really exciting science, some fantastic new companies – which I think are really going to be the core of UK life sciences going forward - and actually in fact a really nice collection of people: very sociable, very engaging, and it’s always really good for networking.”

**JO PISANI PWC
STRATEGY, BIA
CEO AND**



Members Events News Policy About Us Join or Login

UK CEO and Investor Forum - 23/24 May 2018 - Register today

Whether you're a young CEO or a seasoned entrepreneur, this interactive and thought-provoking two-day forum is a key event for the year, and is exclusively designed for those in the investment community and for corporate senior management.

04 JAN 18 **PRESS RELEASE**

Best practice guide for communicating R&D progress to investors and the public

Search the member directory

Find out about the new Genomic Advisory Committee

23 MAR 18 **PRESS RELEASE**

BIA CEO Steve Bates responds to the transition period agreement for Brexit

Check out our latest blog: 'Q&A - How to ensure best practice in communicating R&D progress' featuring tips and adv... <https://t.co/twcteGgnhH> 1 of 5

Latest news from BIA

Press Releases **Member News** BIA blog Our publications

23 MAR 18 **MEMBER NEWS**

A new community for analytical measurement science


CAMS-UK is a new industrially-led, strategically connected membership based community dedicated to supply world class chemical and bio-analytical measurement science (AMS) training, research and innovation. CAMS-UK has two key focus areas: a pipeline of key Analytical Measurement Science (AMS) talent and ii) an innovative core


25 MAR 18 **MEMBER NEWS**

Horizon Discovery Introduces whole human genome arrayed libraries to support CRISPR activation screening

- First-to-market Edit-R CRISPRa arrayed cRNA libraries enable native gene overexpression for high-throughput gain-of-function screening
- Available as small families, bespoke collections, the druggable genome, or human genome-wide

Our supporters





Members Events News Policy About Us Join or Login

Membership directory

Member/keyword Location

We represent over 300 companies. Our members include start-up, emerging and more established bioscience companies, pharmaceutical companies, academic, research and philanthropic organisations, and service providers to the biosciences sector.

Find our members using company name keywords or locations (click on the tabs above and use the search boxes), or use the filters on the right to narrow down your results.


Several of our member companies have sites in multiple locations and so are listed multiple times in the directory. Use the locations tab to view the different sites on the map.

Influence, connect and save with the BIA. Find out about how we can work together.

Type your search here...

DISPLAY 3 RESULTS


R&D/MANUFACTURING X



FUJIFILM Diosynth Biotechnologies
<http://www.fujifilmdiosynth.com>

R&D/MANUFACTURING

FUJIFILM Diosynth Biotechnologies is an industry-leading Biologics Contract Manufacturing Organisation with locations in Billingham, UK and Research Triangle Park, North Carolina, USA.



Johnson & Johnson Innovation
<http://www.jnjinnovation.com>

R&D/MANUFACTURING

Filters

Membership category

Region

Business focus

Therapeutic area

Influence, connect, save



Save

Business Solutions



Members have saved over
£6 MILLION
(average of 56% off list price!) in 2017.



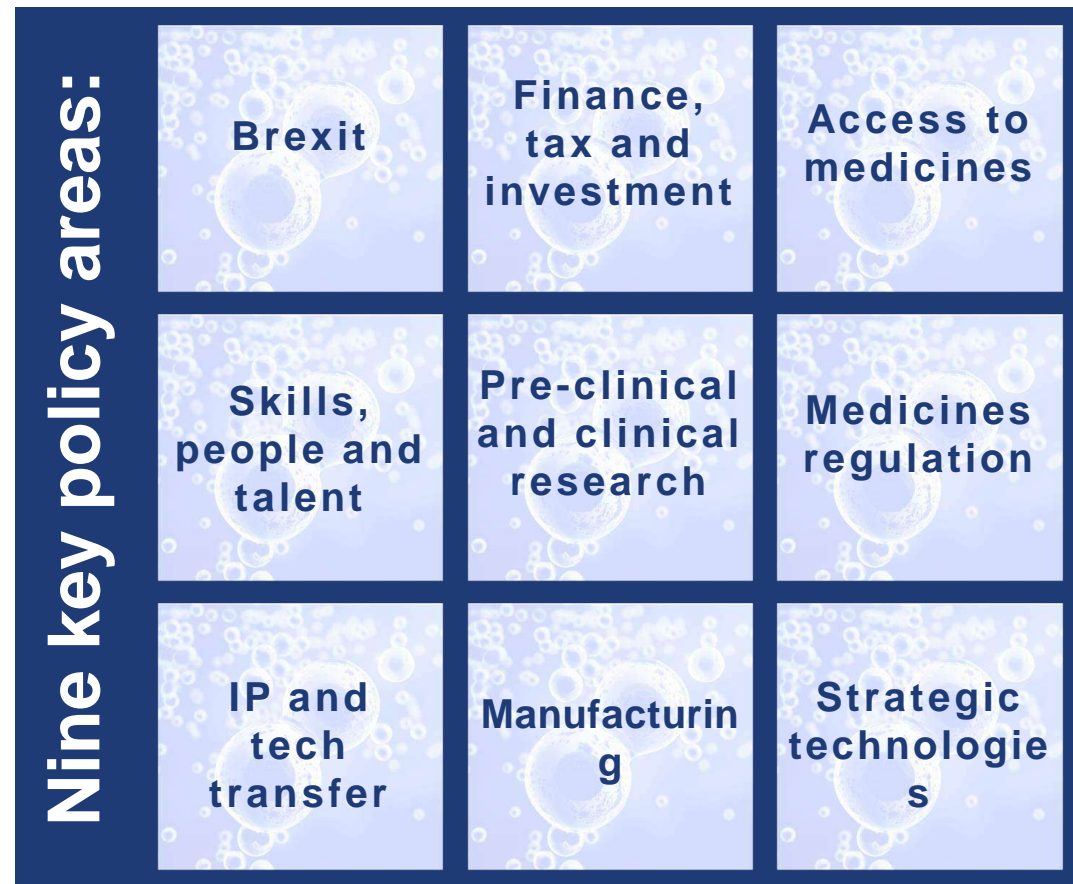
BIA update

16 May 2018

Dr Martin Turner
Policy and Projects Manager



BIA Influence work



2018 priorities for BIA Influence

Brexit

Industrial
Strategy

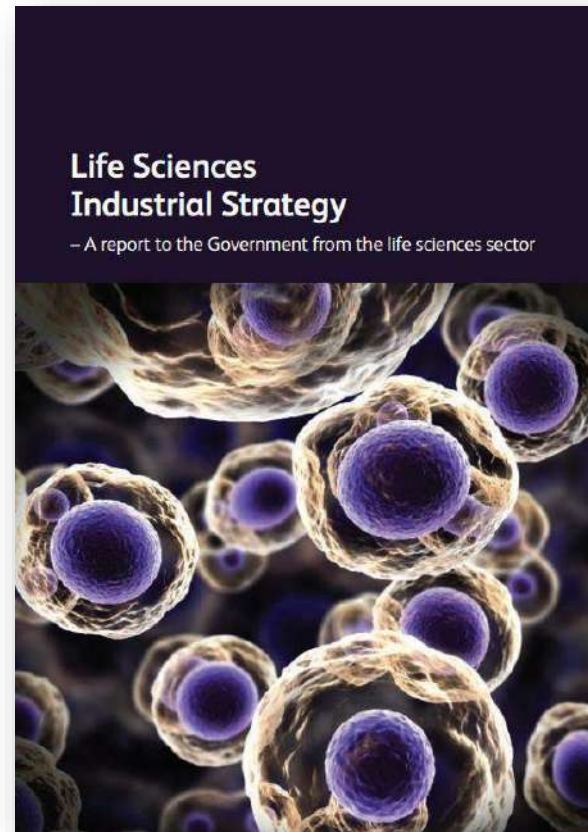
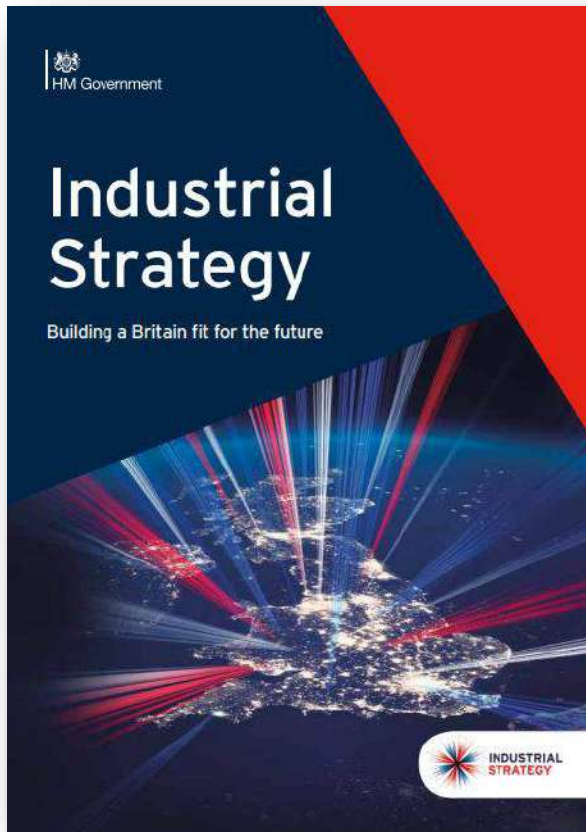
Patient
Capital
Review

Accelerated
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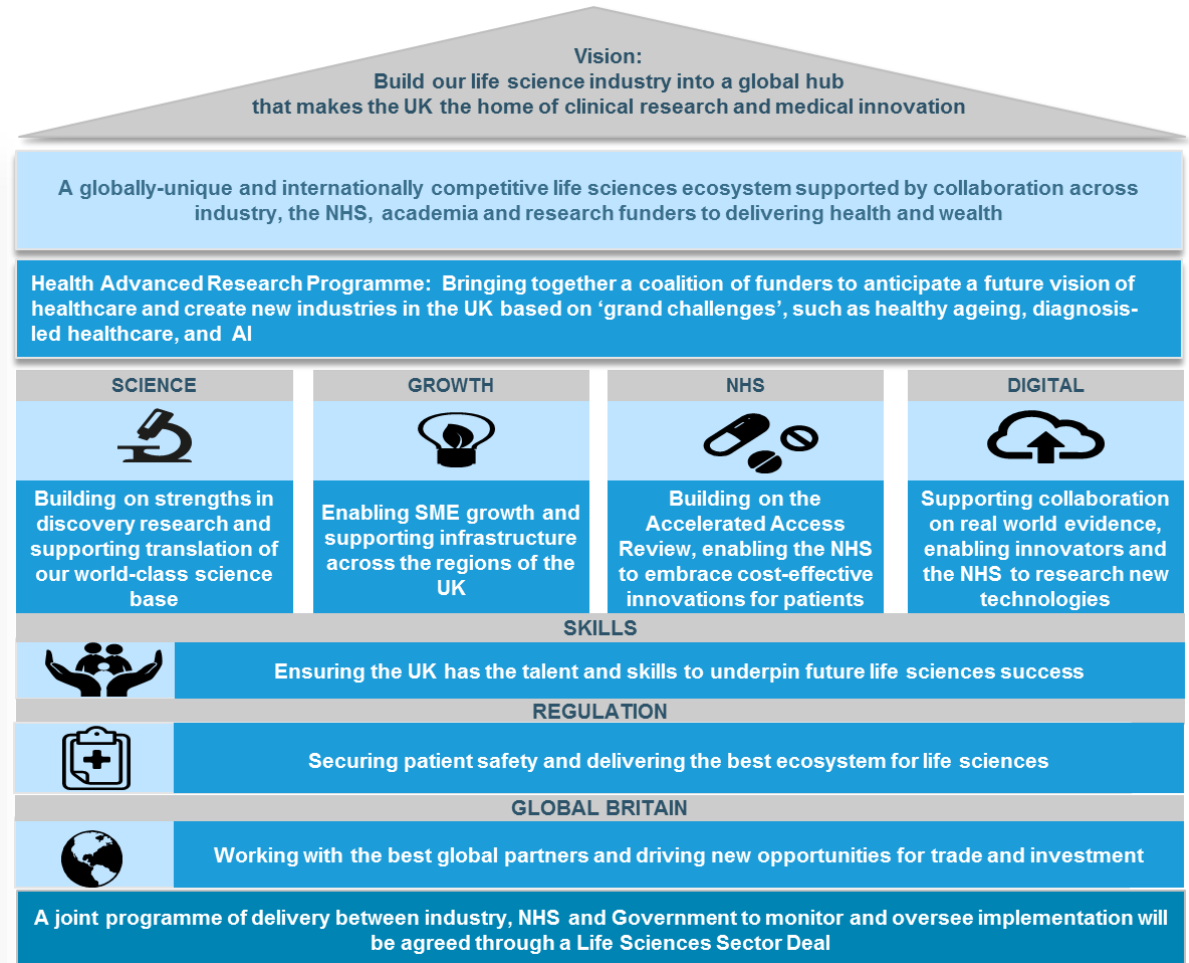
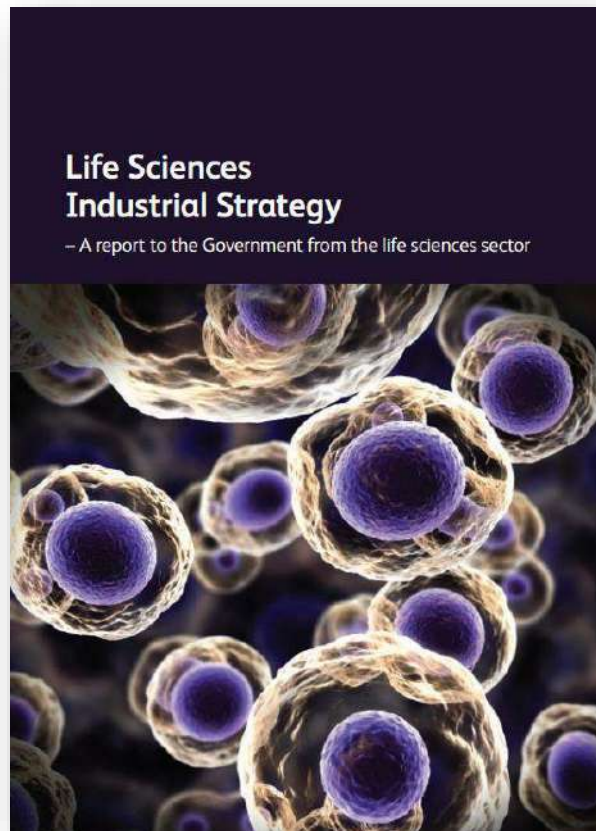
Celebrating
sector
success

International
Engagement

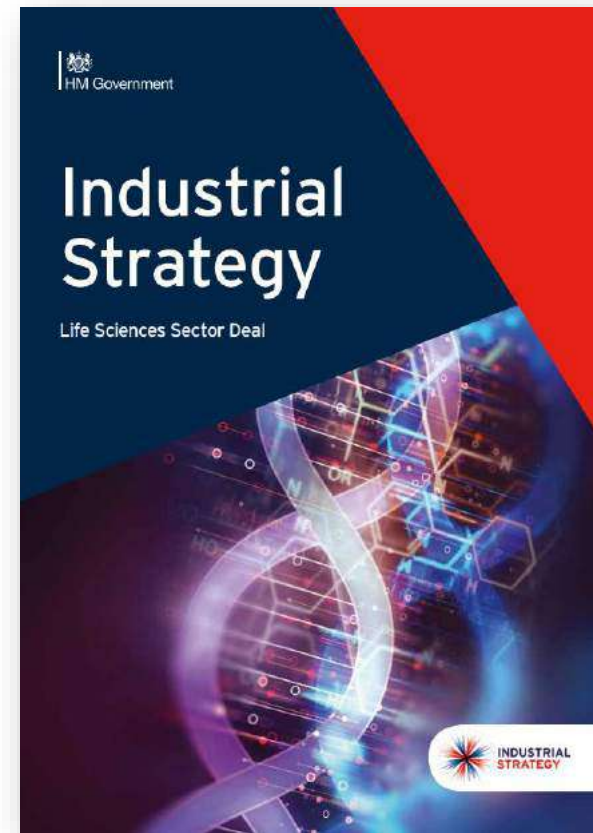
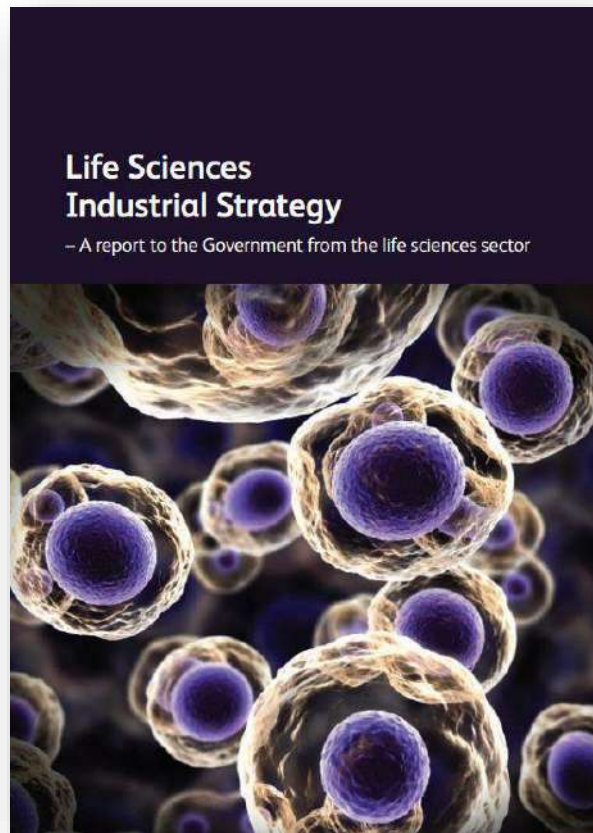
Industrial Strategy



Industrial Strategy



Industrial Strategy



Patient Capital Review



Patient Capital Review



Outcomes

- £2.5bn British Patient Capital fund
- 3 x £500m investments into VC funds

Patient Capital Review



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- Extension of venture capital tax reliefs
- Targeting of tax reliefs to “knowledge-intensive companies”
- Consulting on a Knowledge Intensive Fund structure

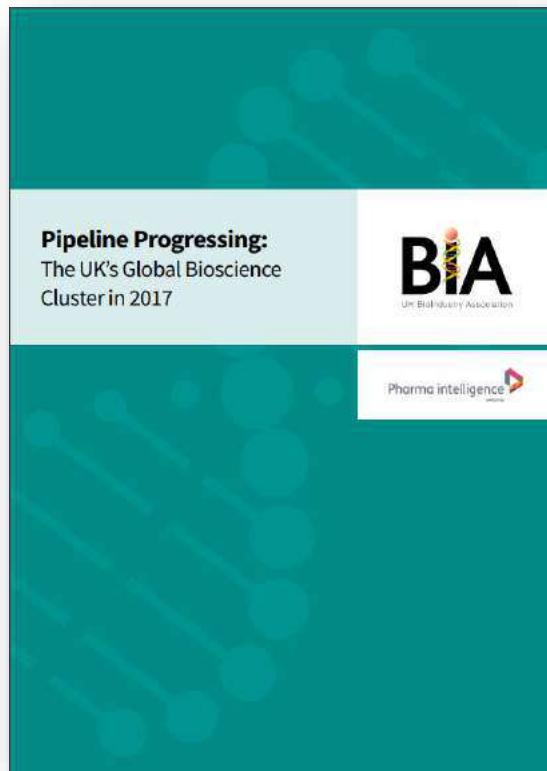
Patient Capital Review



Outcomes

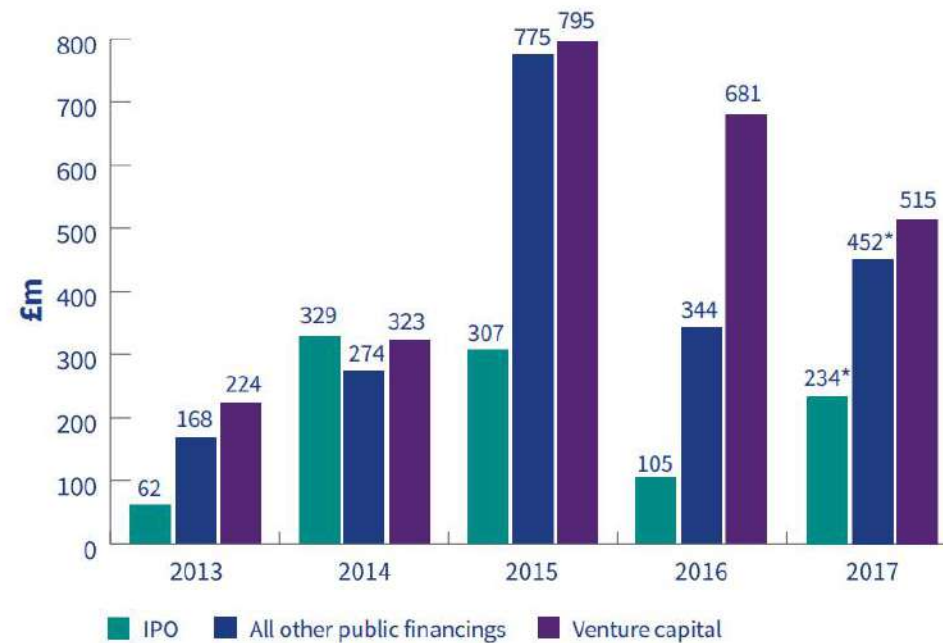
- £2.5bn British Patient Capital fund
- 3 x £500m investments into VC funds
- Extension of venture capital tax reliefs
- Targeting of tax reliefs to “knowledge-intensive companies”
- Consulting on a Knowledge Intensive Fund structure
- Pension fund industry working group
- New guidelines to pension funds

Sector financing



Sector financing

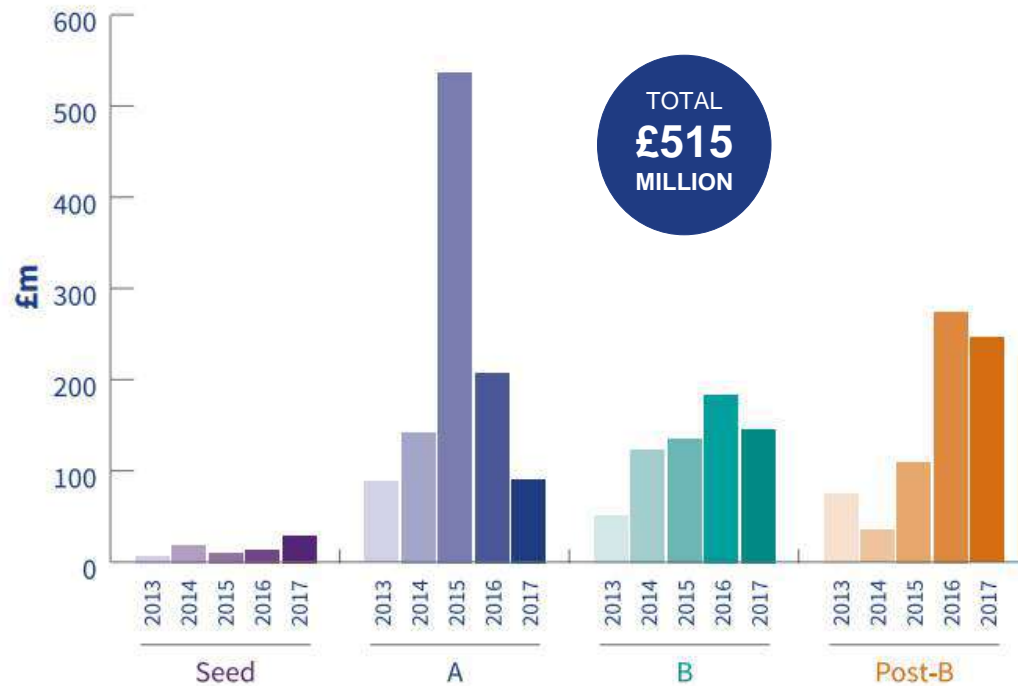
Overall trends, finance raised by UK-based bioscience companies



*Includes Public financing of UK companies on Non-UK exchanges
Source: Informa, Strategic Transactions and Scrip

Sector financing

UK venture capital progression figures over the last five years



Source: Informa, Strategic Transactions and Scrip

Dec 2017-Feb 2018



Source: Informa - Strategic Transactions and Scrip

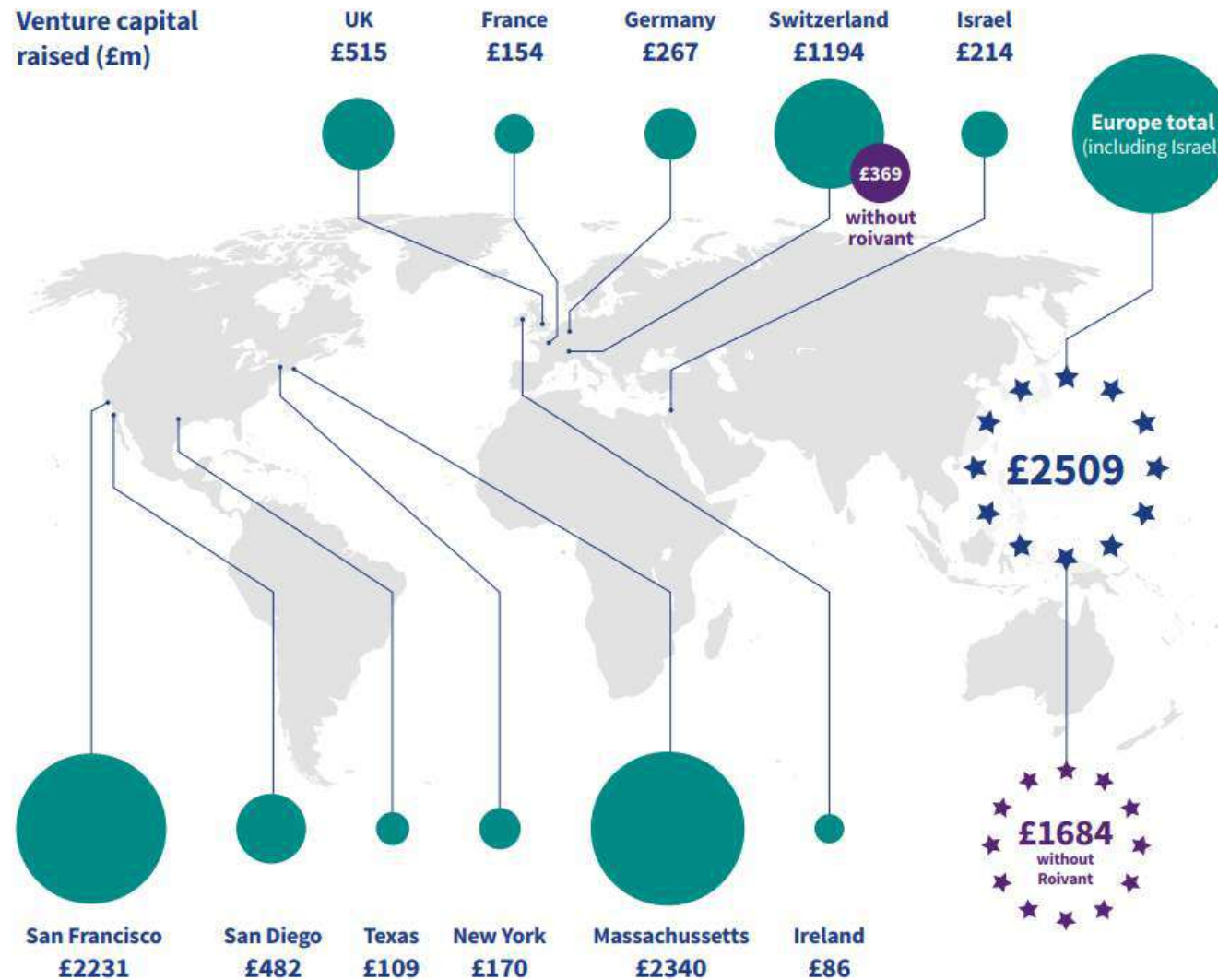
Sector financing

Top UK VC fundraises in 2017

Company	Deal Date	Round	Value (£m)
Cell Medica Ltd.	16/03/2017	C	60
Autolus Ltd.	26/09/2017	C	59
Bicycle Therapeutics Ltd.	01/06/2017	B	40
NightstaRx Ltd.	29/06/2017	C	33.75
Atlas Genetics Ltd.	23/01/2017	D	26.25
Pulmocide Ltd.	20/03/2017	B	22.8
NeRRe Therapeutics Ltd.	05/01/2017	B	23
Fortuna Fix Inc.	08/11/2017	B	18.75
ApcinteX Ltd.	02/02/2017	A	14

Source: Informa, Strategic Transactions and Scrip

Sector financing



Sector financing

UK IPOs in 2017

Company	Amount £m	Date	Market
NuCana plc	85.5	27/09/2017	Nasdaq
Nightstar Therapeutics plc	65	27/09/2017	Nasdaq
Verona	64.4	–	Nasdaq
Destiny Pharma Ltd.	15	04/09/2017	AIM
SkinBioTherapeutics plc	4.5	05/04/2017	AIM

Sector financing

The UK's clinical pipeline leads Europe

Country	Preclinical*	Phase I	Phase II	Phase III
UK	351	43	70	15
France	192	23	39	11
Germany	147	34	38	6
Sweden	137	10	37	8
Switzerland	115	16	24	10
Netherlands	100	11	19	4
Spain	96	9	23	3
Italy	62	4	11	6
Austria	56	14	5	2
Denmark	49	12	13	7
Belgium	43	13	14	6

Sector financing

The BIA's best practice principles for communicating R&D progress

Building on the legal and governance requirements companies must follow, the BIA recommends bioscience companies follow the sector's best practice principles. Communications should be:

-  **Well prepared**
-  **Consistent**
-  **Fair, balanced and understandable (clear)**
-  **Mindful of the impact on members of the public to whom it is personally relevant**

These principles apply to public and private bioscience companies. Although focussed on the communication of R&D, they can be applied generally to the communication of other scientific aspects of business activity, including in services and tools companies.

Private companies are not subject to the legal obligations about when to make public announcements to their investors, but these best practice principles can valuably be applied to their communications about R&D to maintain the understanding and trust of their shareholders, stakeholders and potential investors and licensees, both now and in readiness for an IPO or some other corporate or licensing transaction.

"Transparency and clear communication can help make life sciences companies easier for investors to understand, build trust with the investment community and are critical to attracting additional investment into the sector."

CLARE TERLLOW
MANAGING DIRECTOR, CORPORATE BROKING & ADVISORY, NUMIS

Best practice for communicating R&D progress to investors and the public



Developed in collaboration with

Best practice in communicating R&D progress

Ensuring investors and the wider public are well informed and confident about bioscience is crucial to the success of individual companies and the sector as a whole.

To support the sector to maintain high standards in communications about R&D progress, the BIA has produced a best practice guide for bioscience companies with a supporting library of resources.

These have been produced through consultation with the BIA membership and the investment community. New content will be added to the resources library on an ongoing basis to ensure the guide remains useful and up-to-date as the UK biotech sector grows and evolves.

[Download the guide](#)

Resources library

[A practical guide to MiFID II webinar](#)

[Code of Practice for the Pharmaceutical Industry 2016 \(ABPI\)](#)

[Example of a good announcement to the market](#)

[Glossary of terms](#)

[How can we all best use scientific evidence? \(Academy of Medical Sciences\)](#)

[Make it clear \(INVOLVE, National Institute for Health Research\)](#)

[Market Abuse Regulation](#)

The Scottish Lobbying Act



Lobbying (Scotland) Act 2016

- **‘Regulated lobbying’ must be registered at www.lobbying.scot from 12 March**
- **Regulated lobbying means:**
 1. Face-to-face communication with an MSP or Government Minister/Perm Sec/Advisor
 2. Communicating about Scottish Parliament/Government functions
 3. For the purpose of informing or influencing decisions
 4. Performed by a paid individual
 5. Not covered by statutory exemptions

Lobbying (Scotland) Act 2016

1. Individuals
2. Communication to MSP for constituency or region*
3. Unpaid
4. Small organisations (<10 FTE employees)*
5. Proceedings of the Parliament or required under statute
6. Communications made on request
7. Terms & conditions of employment

Plus:

Journalism; Cross-Party Groups;

Communications by political parties; Judiciary; Her Majesty

Government & Parliament = public bodies and office holders (or those communicating on their behalf)

* doesn't apply to communications on behalf of a third party

Questions



Dr Martin Turner
Policy and Projects Manager

Tel: 020 7630 2192

Email: mturner@bioindustry.org

Contact Us



UK BioIndustry Association

Southside 7th Floor
105 Victoria Street
London
SW1E 6QT

Steve Bates OBE, Chief Executive Officer

sbates@bioindustry.org
020 7630 2190
07880 009170

Jane Wall, Director of Business Development and Membership Services

jwall@bioindustry.org
020 7630 2198
07880 009250

Michael McGivern, Membership and Business Development Manager

mmcgivern@bioindustry.org
0207 630 2194
07920 293 171