



LIFE SCIENCES IN AUSTRIA

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Johannes Lenzhofer, Expert Life Sciences AUSSENWIRTSCHAFT AUSTRIA

Austrian Life Sciences- Key Figures



- Number of Companies*: 723
- Number of Employees*: 50,180
- Turnover*: 17.7 bn. EUR (~ 5,4% of GDP)

Biotech and Pharma

- Number of Companies: 288
- Number of Employees: 25,190
- Total Turnover: 10.3 bn. EUR

Medical Technology

- Number of Companies: 435
- Number of Employees: 24,990
- Total Turnover: 7.4 bn. EUR

* figures as of 2012; including Service Providers, Suppliers and Sales Companies
 Source: Life Sciences in Austria 2014

Life Sciences in Austria – the Place to Do Business

- **Corporate income tax:** max 25%
- **Optimal research infrastructure** (academic and corporate)
- Customised **regional and government grants**
- **R&D cash premium:** 10% of expenditure in R&D
- Very good legal **patent and copyright protection**
- **Excellence** of its **workforce and education system**
- Vienna: #1 in Mercer **Quality of Living**
- **5 Life Science Clusters** support industry and research

Life Sciences in Austria - LISA

- LISA: umbrella organisation for the 5 Austrian life science clusters
- LISA represents companies in the biotech, medical technology and diagnostic sectors as well as providers of platform technologies and related service companies
- Facilitate cooperation between producers, networks of suppliers and service providers all within a short distance

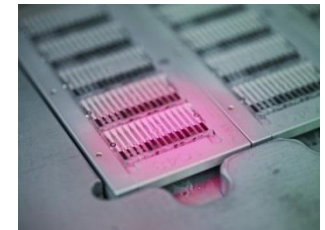


Source: Life Science Austria 2014



Life Sciences - What We Are Good At

- **Drugs and Therapeutics**
Cancer, vaccines and anti-infectives
- **Medical Technologies**
Prosthetics, imaging, (smart) devices
- **Production and Platform Technologies**
Good Manufacturing Practice (GMP); also companies producing plasma, special enzymes and other biological substrates
- **Advanced Diagnostics and Analytics**
molecular diagnostics and personalised medicine

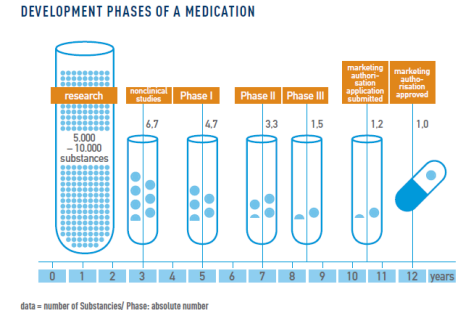


Biotech and Pharma – Research & Development

- Attractive research location for international players
- 112 new medicinal products launched in Austria from 2009-13

R&D Expenditure

- Research-intensive industry:
8,2% of revenue is spent on R&D*
- long product development cycles: ~ 12 years



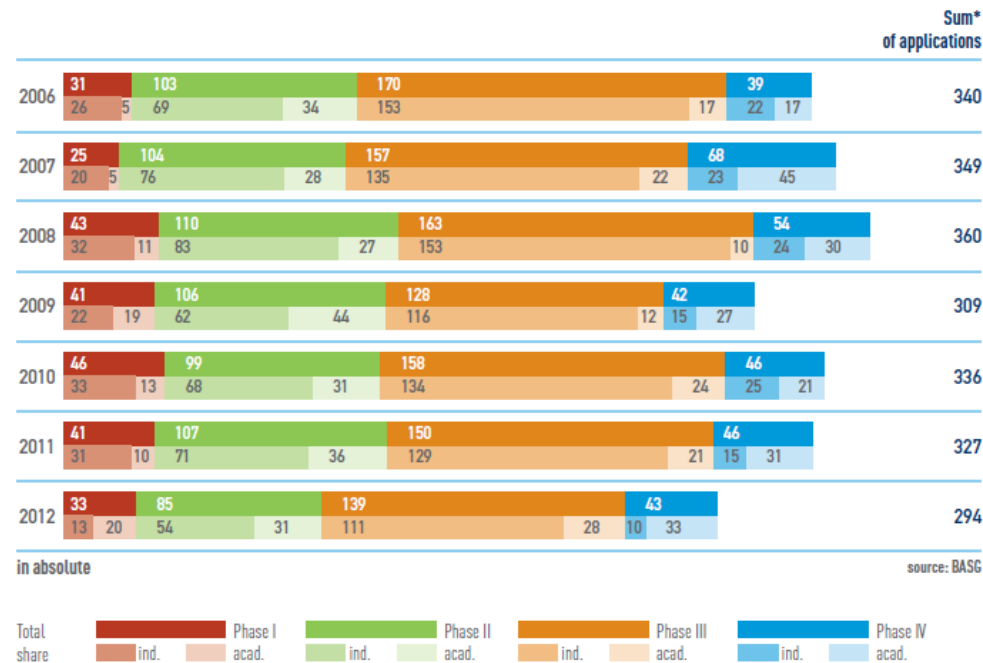
Sponsors of clinical trials

- around 300 clinical trials submitted annually (EU: 4,400)
- pharmaceutical industry: 72% (EU: 60%)
- academic researchers: 28% (EU: 40%)

* Average of all industries in Austria: 4,1%

Biotech and Pharma – Clinical Studies in Austria according to Phases

Overall applications remained within a constant fluctuation range.



Source: PHARMIG Facts a& Figures 2014

Examples of Biotech Deals in Austria

- **Hookipa Biotech** - raised 20m EUR in a series B equity financing (11/2013)
- **Intercell** - 133 m. EUR merger with French Vivalis (now Valneva SE) (02/2013)
- **Savira** - license deal with Roche 240 m. EUR (05/2012)
- **f-star** - License deal with Boehringer-Ingelheim 1.26 bn. EUR (12/2010)
- **Marinomed** - Sales Deal with Boehringer-Ingelheim (6/2010)
- **Apeiron** - License deal with GlaxoSmithKline 236 m. EUR (02/2010)
- **AFFiRiS** - License deal with GlaxoSmithKline 430 m. EUR (10/2008)

On top of these deals, a large number of VC firms and corporate ventures invest in Austrian life science companies

Life Sciences in Austria – Outlook & Trends

- Expiration of patents for blockbuster drugs
- Enormous demand for new products and developments
- Innovation means growing R&D expenditures
- Close cooperation of biotech, pharmaceutical companies and platform providers to develop replacements (in terms of revenue)
- Growing demand for bio-based innovations
- Personalized medicine (esp. taylormade drugs)
- eco-friendly production to reduce carbon footprint

Any questions?



Johannes Lenzhofer
AUSSENWIRTSCHAFT AUSTRIA
aussenwirtschaft.io-branchen@wko.at