



LIFESparks 2005

Swiss Life Sciences Sector

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Biotechgate: a European Biotech Database

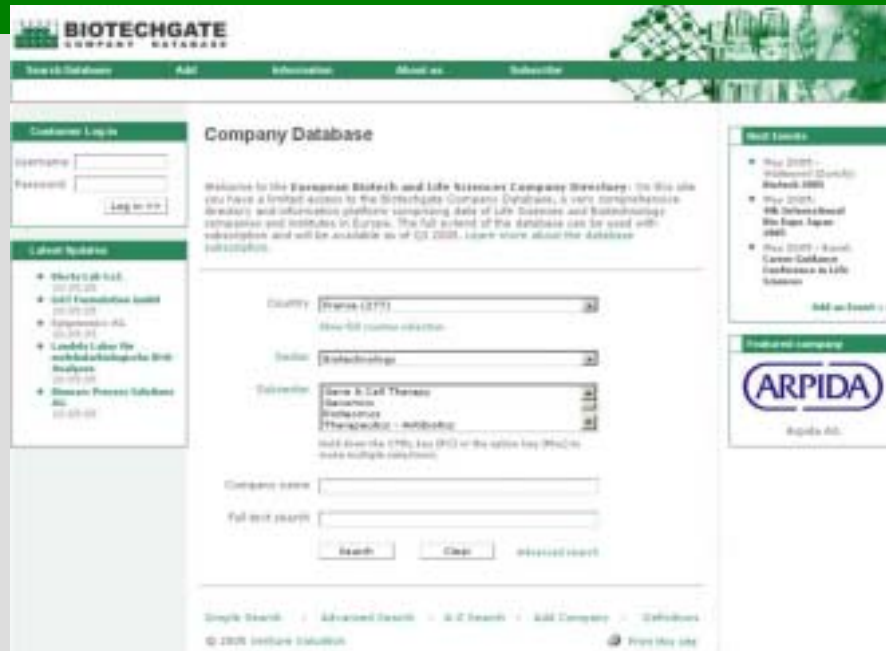
A European Biotech
(www.biotechgate.com)
database, fed by
country Databases

www.austrianbiotech.com

www.frenchbiotech.com

www.italianbiotech.com

www.swisslifesciences.com





Biotechnology in selected EU countries

Biotech Industry Overview

Overview of some key figures

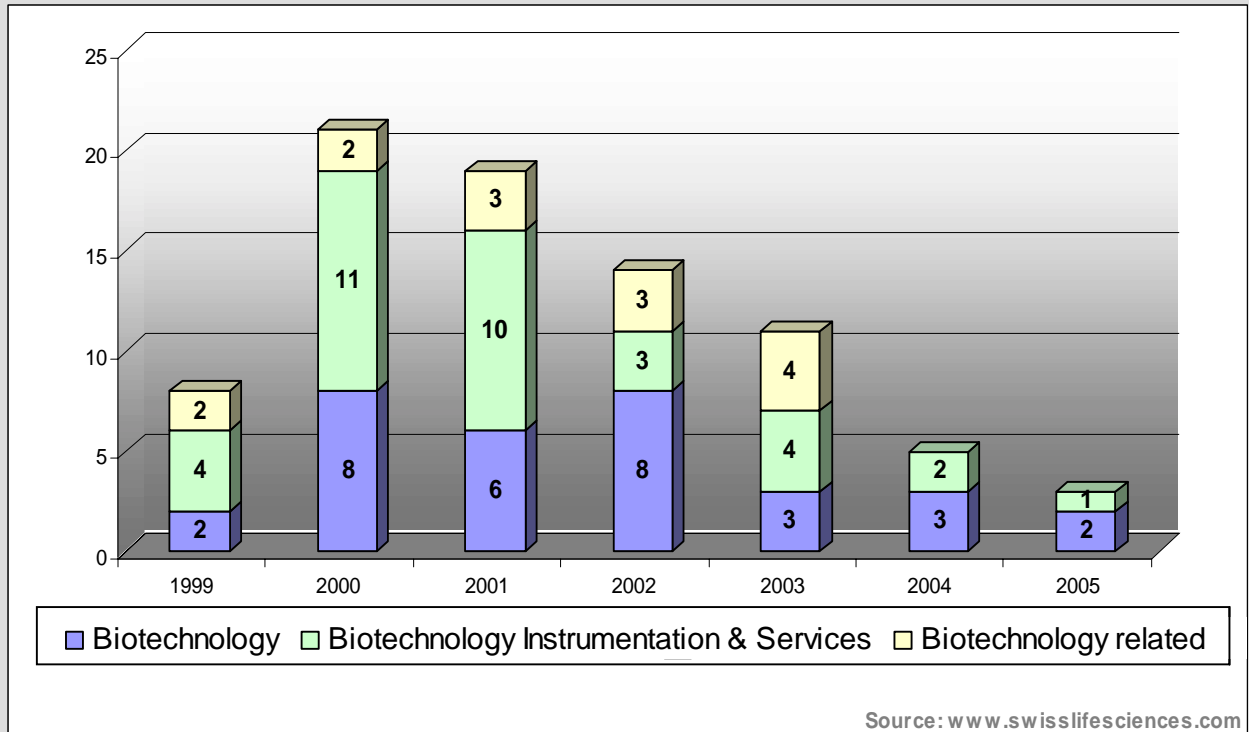
	Austria	France	Italy	Switzerland
Biotech Companies	61	210	198	294
Core Biotech Companies	17	69	32	54
New Comp. (2000-2005)	16	68	33	76
University spin-off	66%	81%	52%	59%
Up to 20 employee	58%	62%	58%	52%
# of clinical products	5	58	39	67

Comments: Based on information available on www.biotechgate.com.

Biotech Industry In Switzerland



Swiss Biotech Companies 1999 - 2005 ((year founded)
Breakdown by Main Categories

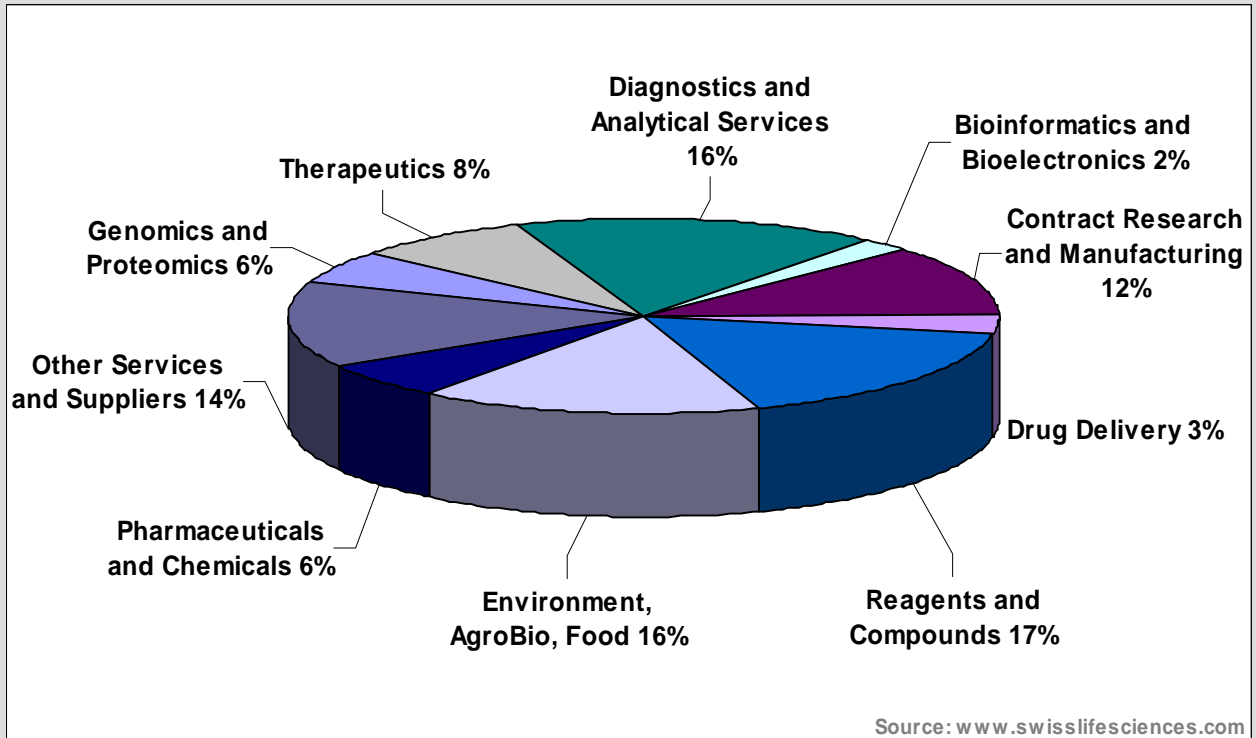


Comments: Total 81 foundations between 1999 - 2005.

Biotech Industry In Switzerland



Swiss Biotech Companies - Breakdown by Subcategories

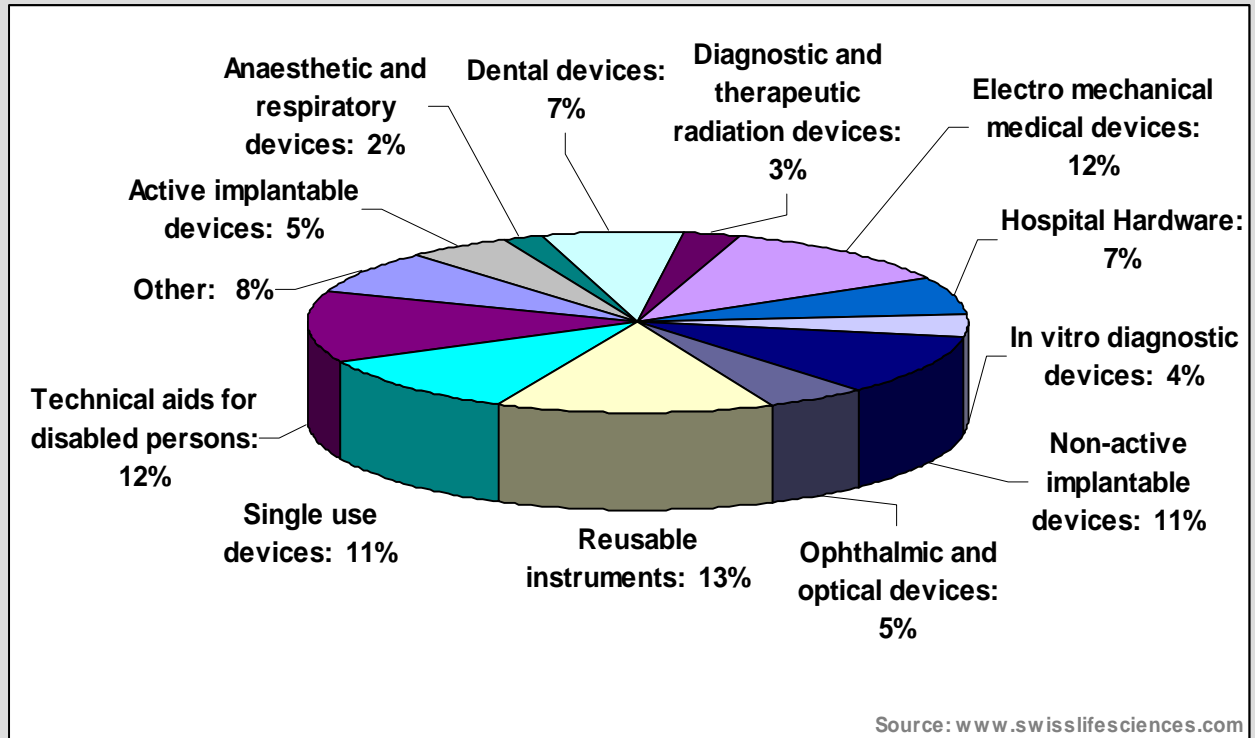


Comments: Based on the categorization of Swiss Life Sciences Database; Total of 288 companies.

Medtech Industry In Switzerland



Swiss Medtech Companies - Breakdown by Subcategories

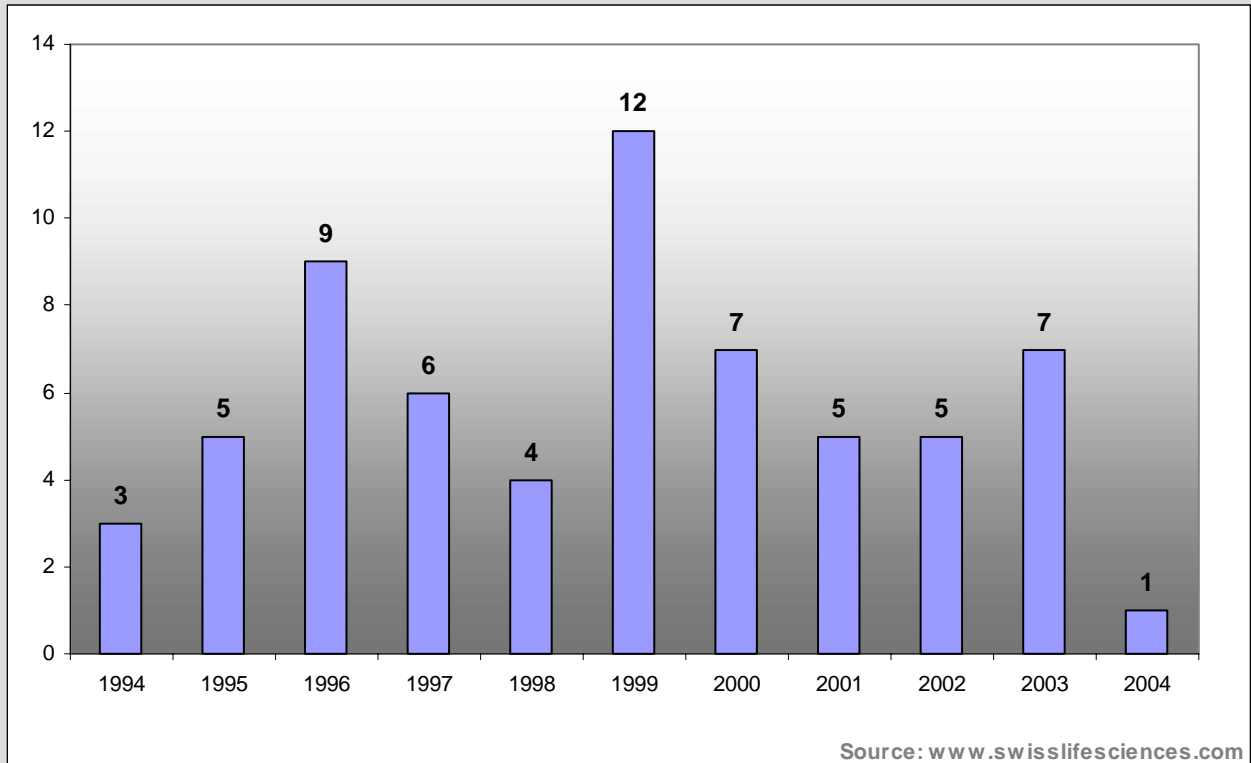


Comments: Based on the categorization of Swiss Life Sciences Database; Total of 327 companies.

Medtech Industry In Switzerland



Swiss Medtech Companies 1999 - 2005 (year founded)

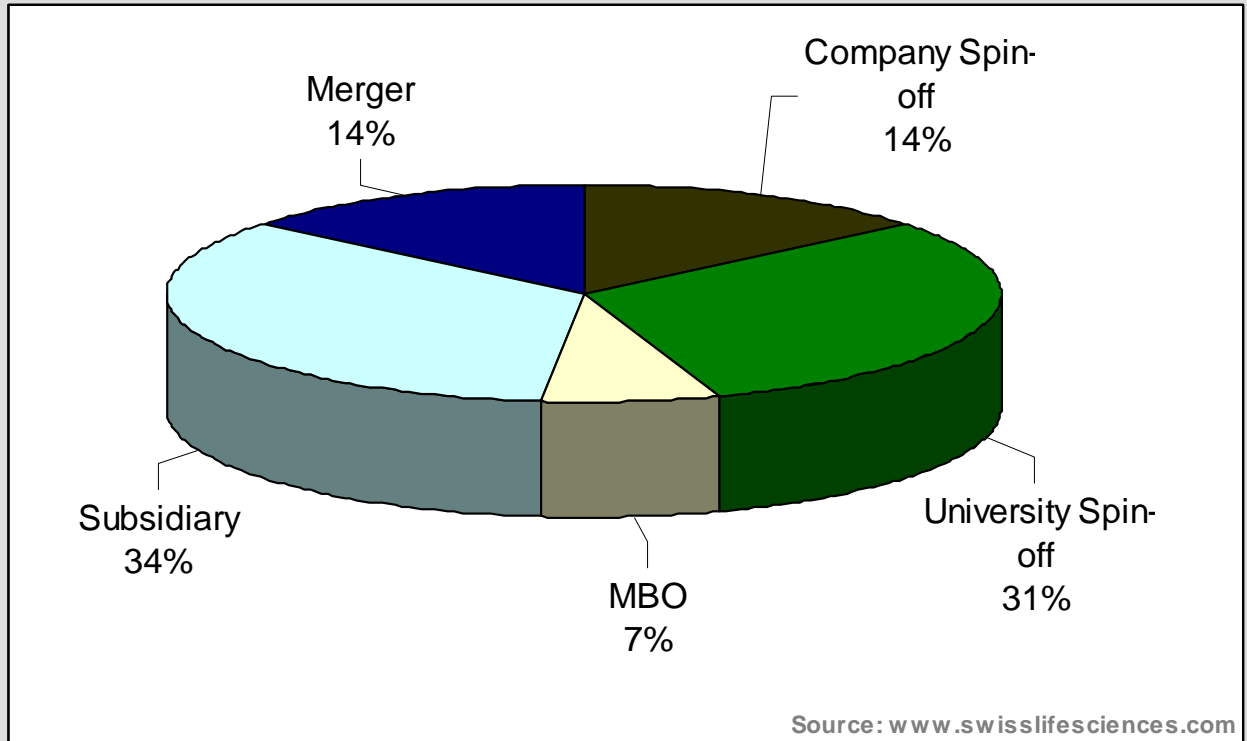


Comments: Based on the categorization of Swiss Life Sciences Database; Total of 64 companies.

Medtech Industry In Switzerland



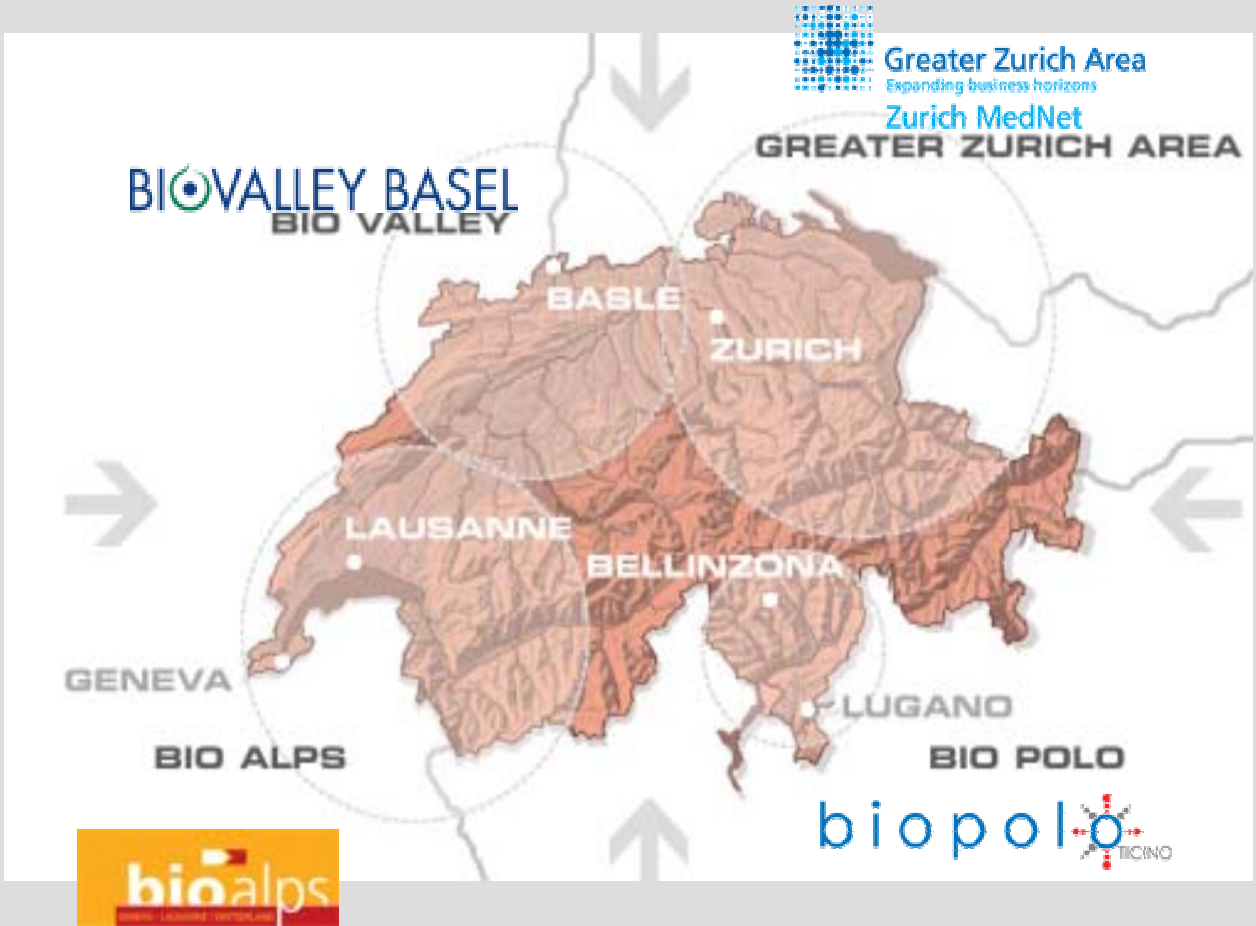
Source of Foundation of Medtech Companies



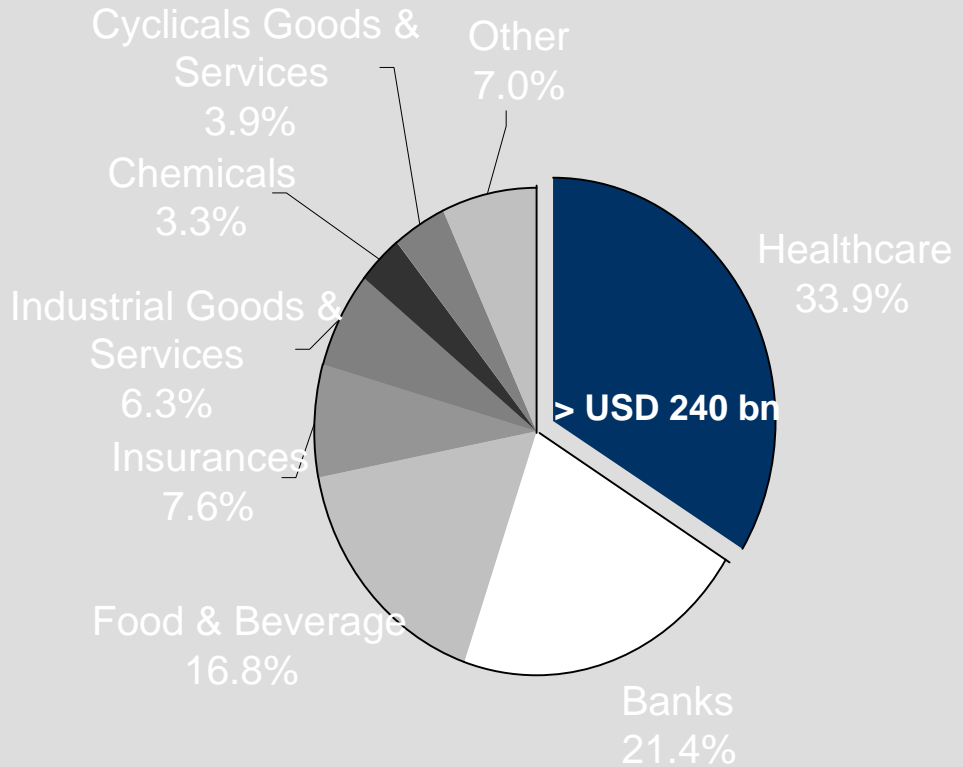
Comments: Based on the categorization of Swiss Life Sciences Database; Total of 29 companies.

Swiss Biotech and clusters

SWISS 
BIOTECH



Breakdown as of September 2005

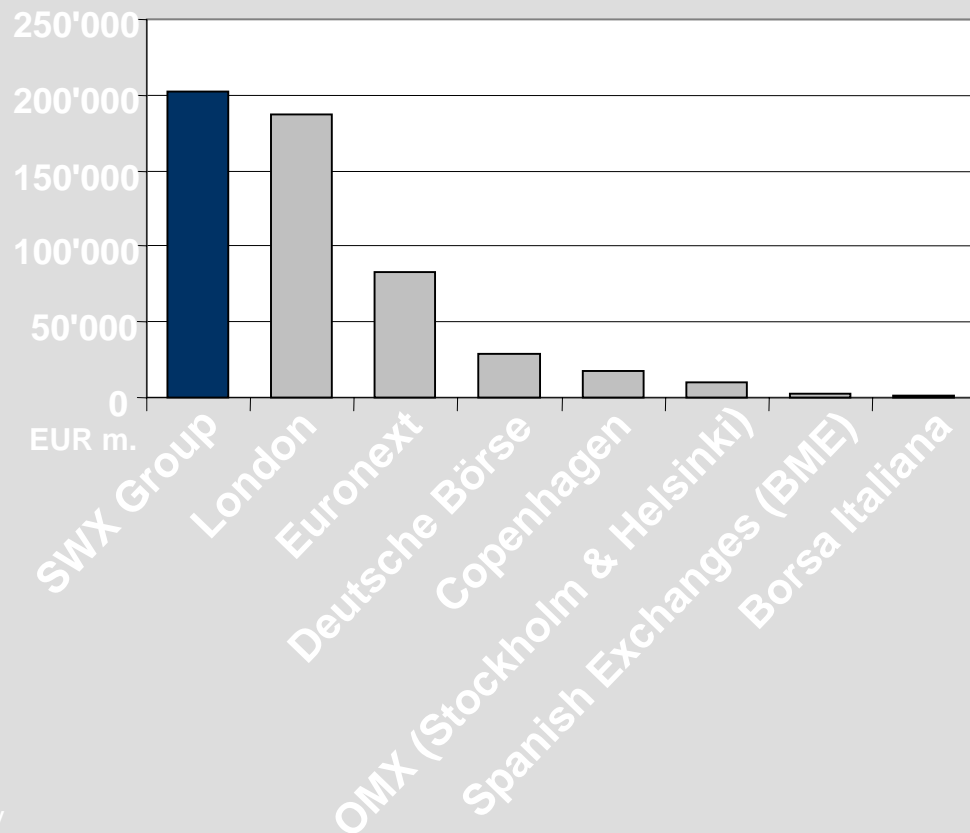


Source: SWX Swiss Exchange



Major European exchanges

Market Cap. of
Healthcare Companies

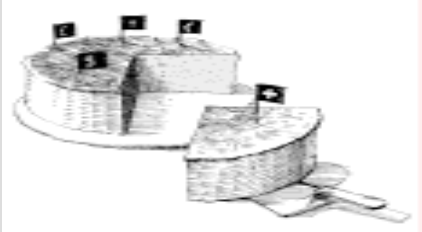


(Approximated by
DJ STOXX TMI
Companies applying
ICB classification)

Status: July 2005

Source: FESE

Financial centre Switzerland

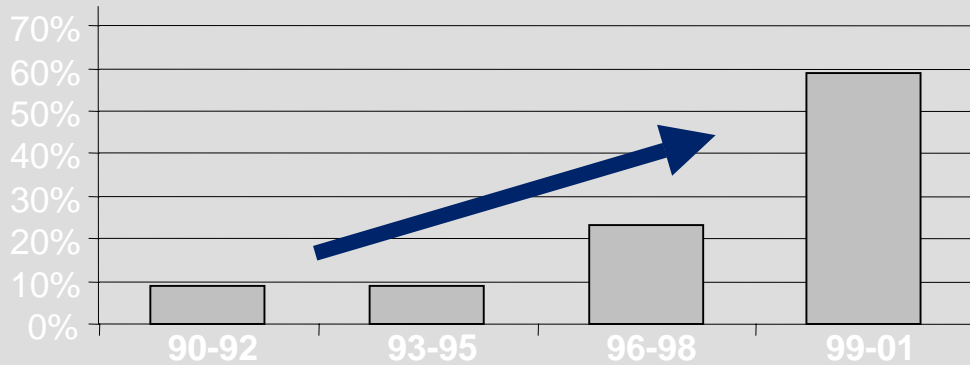


- International investor base and leading position in cross-border private banking:
 - Assets managed in Switzerland: CHF 3,459 bn*
 - Proportion owned by foreign clients: 57%*
 - Worldwide share of total assets managed abroad: 27%**
- One of Europe's leading financial centres for equity-investing institutions
- High placing power
- High visibility of listed companies
- Further advantages of location:
 - High level of education
 - Some of the most liberal labour laws in the world
 - Very favourable tax law (private and corporate)
 - Political stability

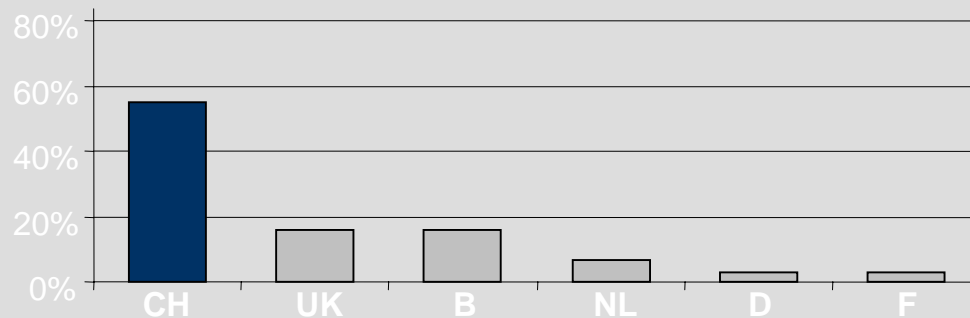
* Source: Eidg. Finanzdepartement EFD, 2005 / ** Source: Geld, Bank- und Finanzmarkt-Lexika der Schweiz, 2002

Switzerland is the most attractive place for global/regional headquarters location

Growth of headquarters transfers to Switzerland 1990-2001 as % of total number of transfers



Destination of global headquarters that moved outside their country of origin as % of all global headquarters that moved



Source: Arthur D. Little



- IPO of Arpida (market cap. EUR 190 m)
- Sale of Glycard to Roche (EUR 160 m)
- IPO of Speedel (market cap. EUR 600 m)
- IPO of Ypsomed (market cap. EUR 1'113 m)



Venture Capital Funds



- Adamant Biomedical www.adamantinvest.com
- Aravis www.aravis.ch
- Aventic AG www.aventic.com
- BB Biotech Ventures www.bbbiotechventures.com
- Global Life Science www.glsv-vc.com
- Nextech Venture Ltd. www.nextechventure.com
- New Venturetec www.newventuretec.com
- Novartis Venture Fund www.venturefund.novartis.com