



HEALTH INNOVATION WEST

Market analysis of cluster strongholds and opportunities

April 2021, Gothenburg

What we set out to do, and how we did it

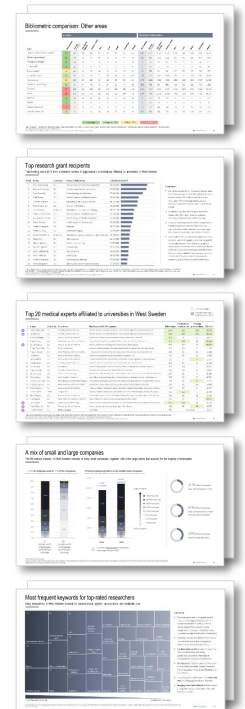
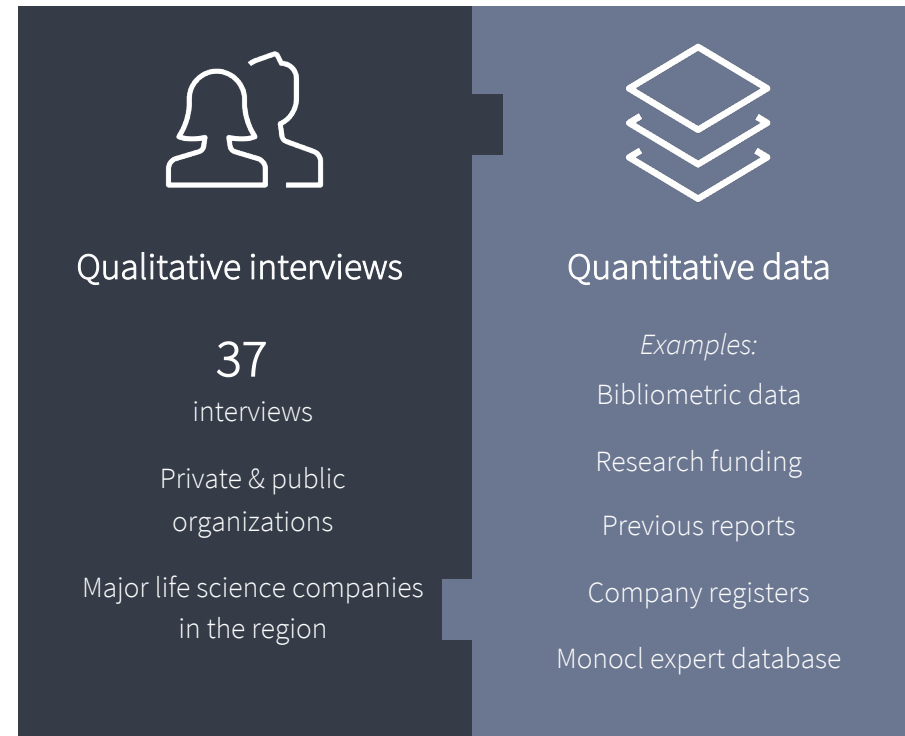
REPORT PURPOSE

Anchored in industry needs and strategic focus:

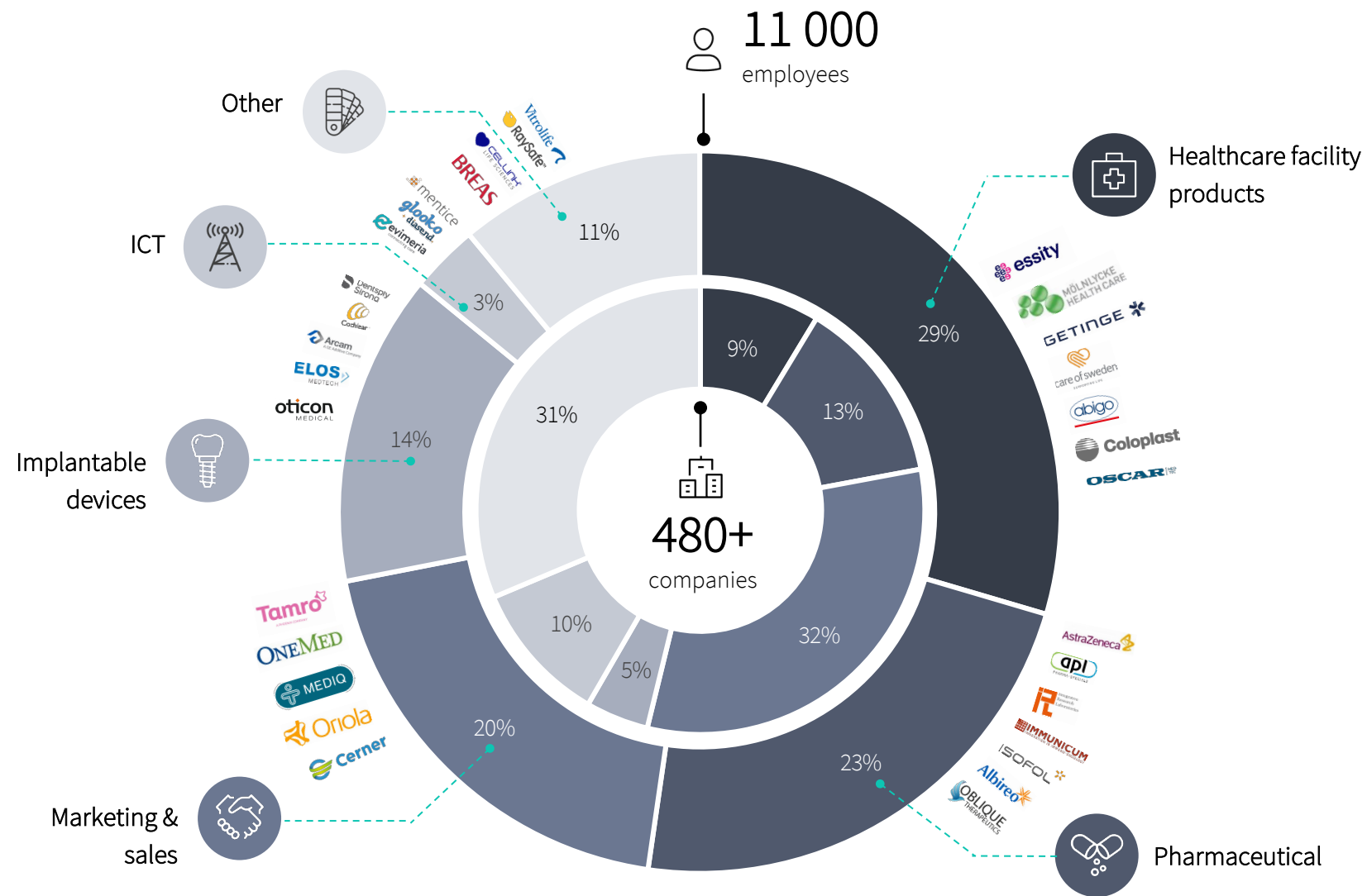
1. Identify areas of excellence with industrial relevance where Health Innovation West has the potential to become world class
2. Create a fact-based updated overview of the life science cluster in West Sweden
3. Identify experienced challenges and improvement potential

METHODOLOGY

A data drive-approach combining quantitative and qualitative data



Industry strongholds in healthcare facility products, pharmaceuticals and implants



The presence of big companies represents a key regional strength

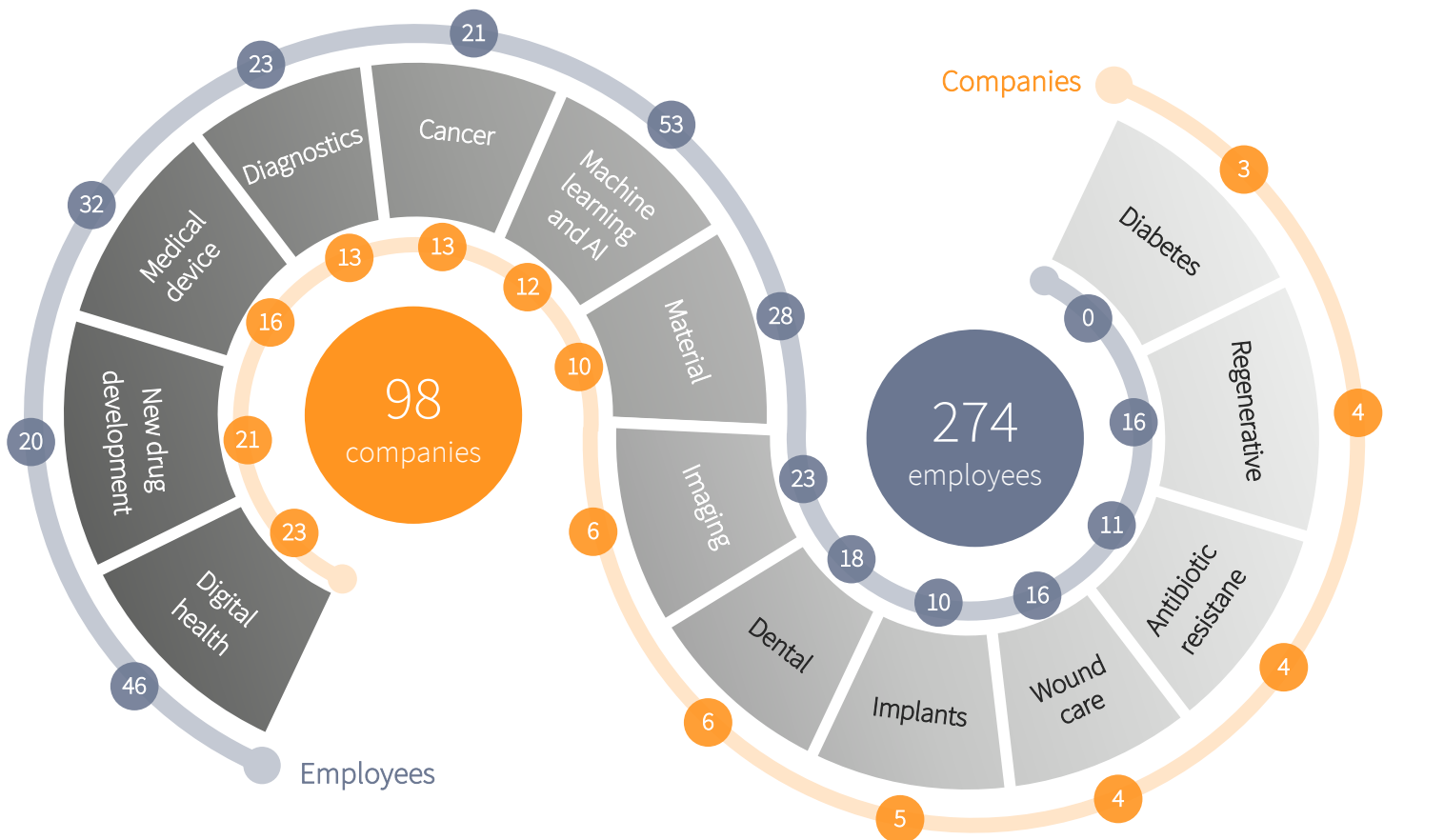
Company	Employees
AstraZenca	2 225
Essity	1 844
Dentsply Sirona/Wellspect	863
Mölnlycke	512
Geringe	482
Cochlear	201
Vitrolife	154
Cellink	95*

11 000
employees

480+
companies

Start-up companies focused on digital health and new drug development

What do West Sweden's life science start-ups focus on?
Number of companies and employees per area



Elements in place for a world-class life science cluster

Industry strongholds

- Presence of large industrial companies
- Industrial strongholds in certain areas
- Fast growth in ICT and new drug development
- Proximity to tech and automotive industry

Industry
strongholds











Prominent science

General infrastructural strengths

- Strong collaboration academia / healthcare / public
- Prominent infrastructure and initiatives
- High quality clinical research
- Developed and supportive innovation system
- Active region supporting Life Science
- Geographical proximity & “A get things done” – mentality

General infrastructural
strengths

Prominent science

-  Dentistry and oral surgery
-  Cardiovascular and metabolic diseases
-  Biomaterials
-  Transplantation
-  Neuroscience & Geriatrics
-  Maternity and midwifery
-  System biology and bioinformatics
-  Basic research oncology
-  Genetic research
-  Complementary subjects: Chemistry, materials science and energy

Addressing the challenges

“

“My experience is that one wants to keep companies on arm’s length distance.”

“

“I do not even know how many biotech companies there are in Gothenburg ... I know more companies in Lund...”

“

“If I would go to Lindholmen with an idea about self-driving cars, people would come from all sides and want to get in. But there is no such vision in our area. People do not know about it”

What could be the self-driving car of Life Science in West Sweden?

Prioritized areas of excellence:

- Mutual cross-sector potential and interest – anchored in industrial needs
- Opportunity to leverage existing strongholds
- High impact areas fulfilling a Nordic need



Prioritized areas of excellence with industrial relevance



Prioritized areas of excellence with industrial relevance



Prioritized areas of excellence with industrial relevance



1.

Materials science & Infection control

- Existing stronghold
- Key priority for many companies
- Need for partnering, accentuated during COVID-19 pandemic



2.

Regenerative medicine & ATMP



3.

Advanced Drug Delivery



4.

Digital Health & AI




5.

Medical Imaging

Prioritized areas of excellence with industrial relevance



1.
Materials
science &
Infection control



2.
**Regenerative
medicine &
ATMP**

- AstraZeneca
- Take position in growing field
- Available infrastructure and initiatives



3.
Advanced Drug
Delivery



4.
Digital Health
& AI

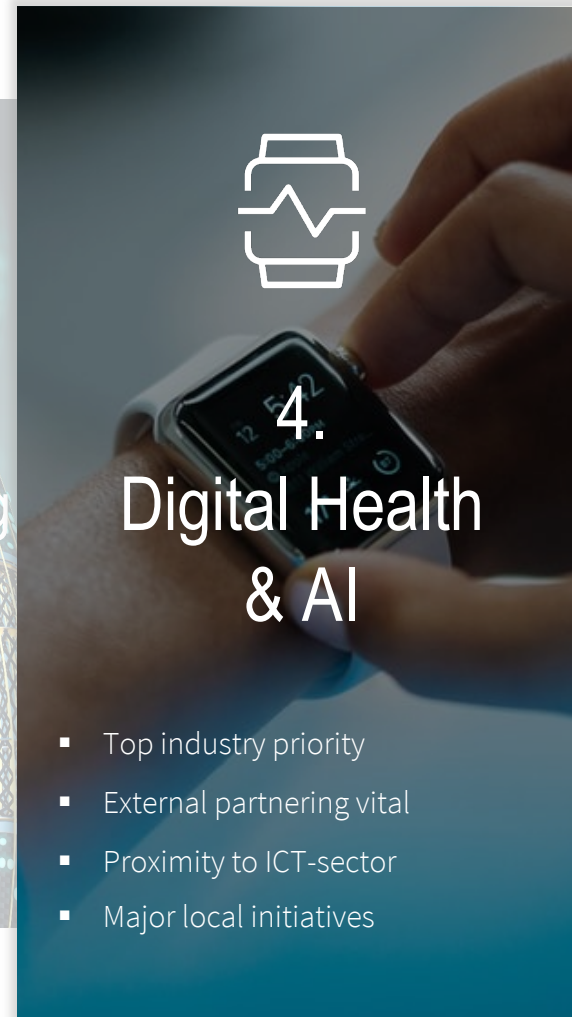


5.
Medical
Imaging

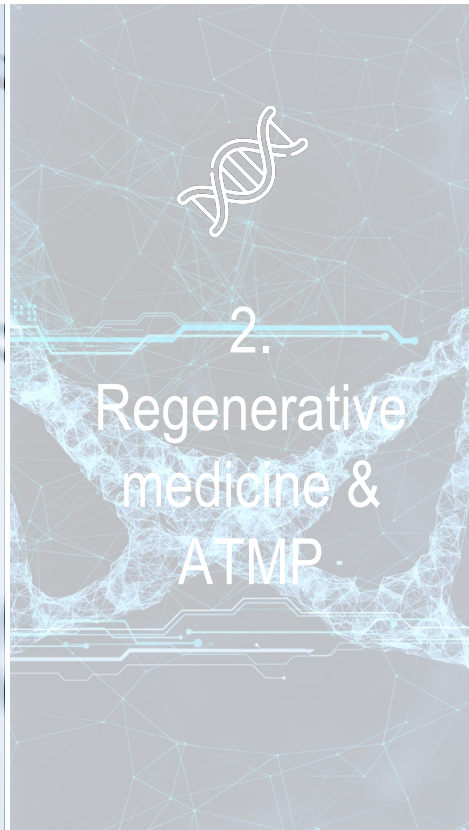
Prioritized areas of excellence with industrial relevance



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Prioritized areas of excellence with industrial relevance



Prioritized areas of excellence with industrial relevance



Overall conclusions: Potential exists. Now it's mode of execution*



Possess elements necessary to
become a world class life
science cluster



The ecosystem is far from
optimally utilized and
challenges exists



A built-up momentum exists
and expectation for execution



Now about connecting people,
execute and deliver short term-
success and long-term enablers

**... and this work has already started*

Raising the ambition:

Build recognition for *real* cross-sector collaboration

“Imagine if Western Sweden was known as the region where evidence is generated, where new innovation is adopted^{*}”

^{*}Quote heard during interviews

Thank you!
And let's make this happen!

Nordic office, HQ
Gothenburg, Sweden
triathlon.se

Asia office
Tokyo, Japan
triathlongroup.jp

West Europe office
Lyon, France
triathlongroup.fr

East Europe office
Moscow, Russia
triathlongroup.ru

North America office
Dover, Delaware, USA
triathlon.se

Middle East office
Muscat, Sultanate of Oman
triathlon.se

