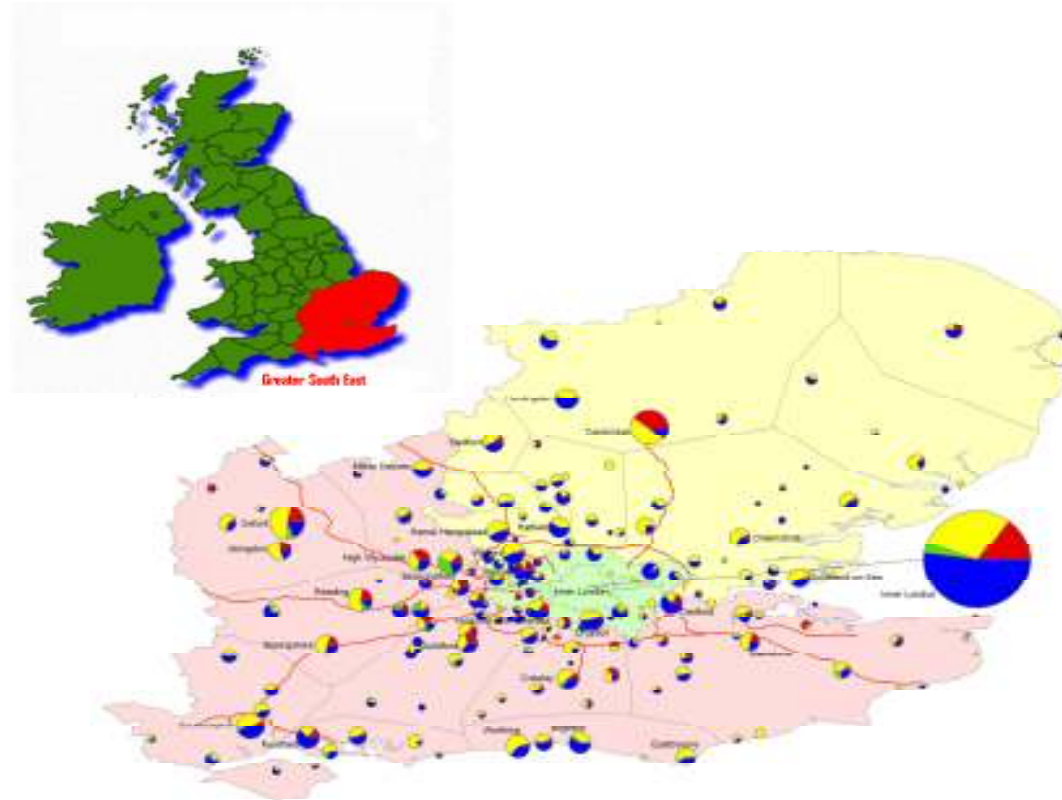


The Health Technology Sector in the Greater South East: Location, Performance & Innovation Potential

Dr. Emanuela Todeva, University of Surrey

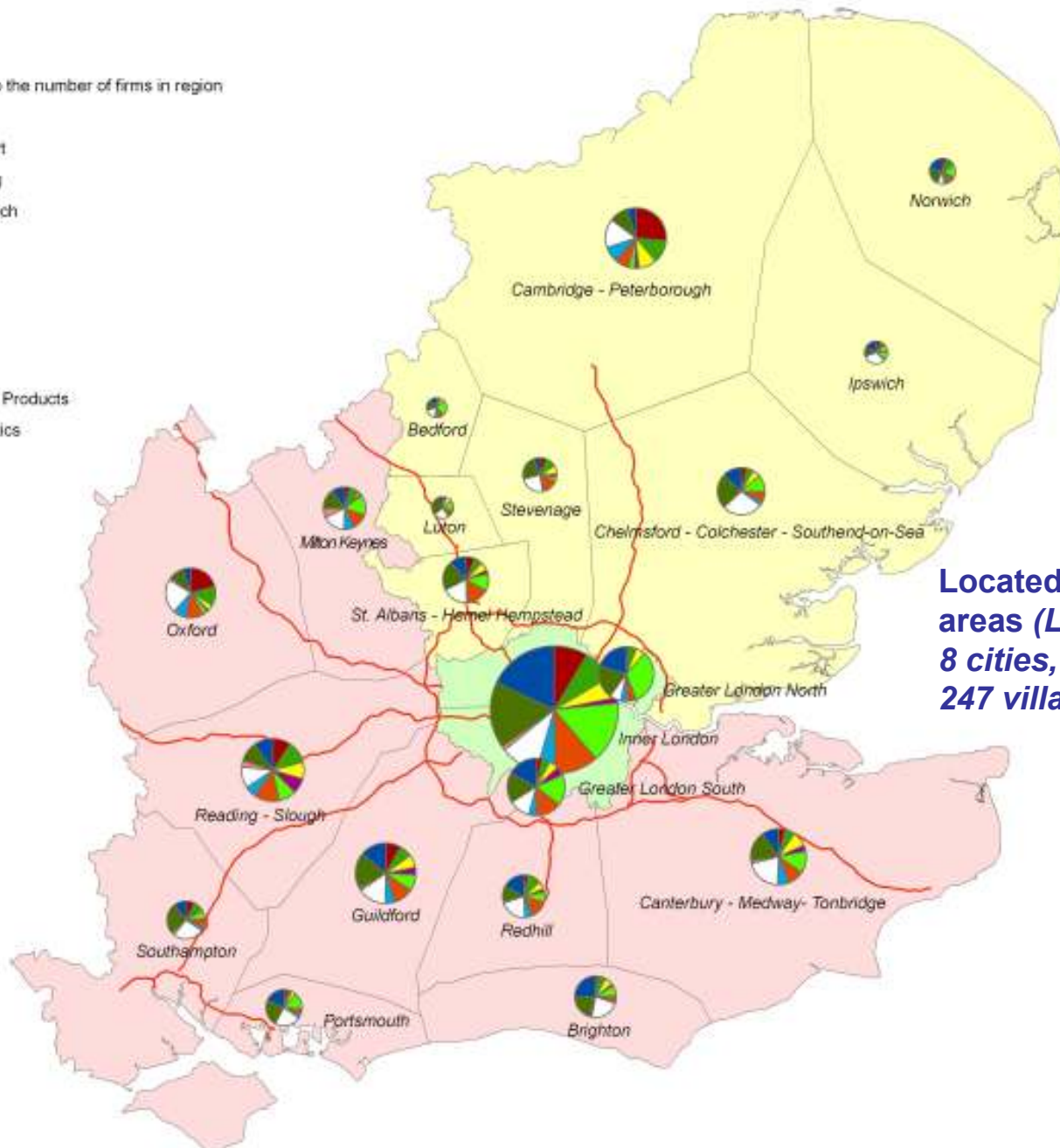


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Health Technology Sector in the GSE

Legend

-  Size is proportionate to the number of firms in region
-  Bio-Pharma R&D
-  Drug Development Support
-  Bio-Pharma Manufacturing
-  Integrated Pharma & Biotech
-  Trade Pharma Products
-  Bio-Pharma Support
-  Diagnostics
-  Medical Devices
-  Telecare
-  Trade Medical and Optical Products
-  Health Products & Cosmetics
-  Administrative Regions
-  Motorways

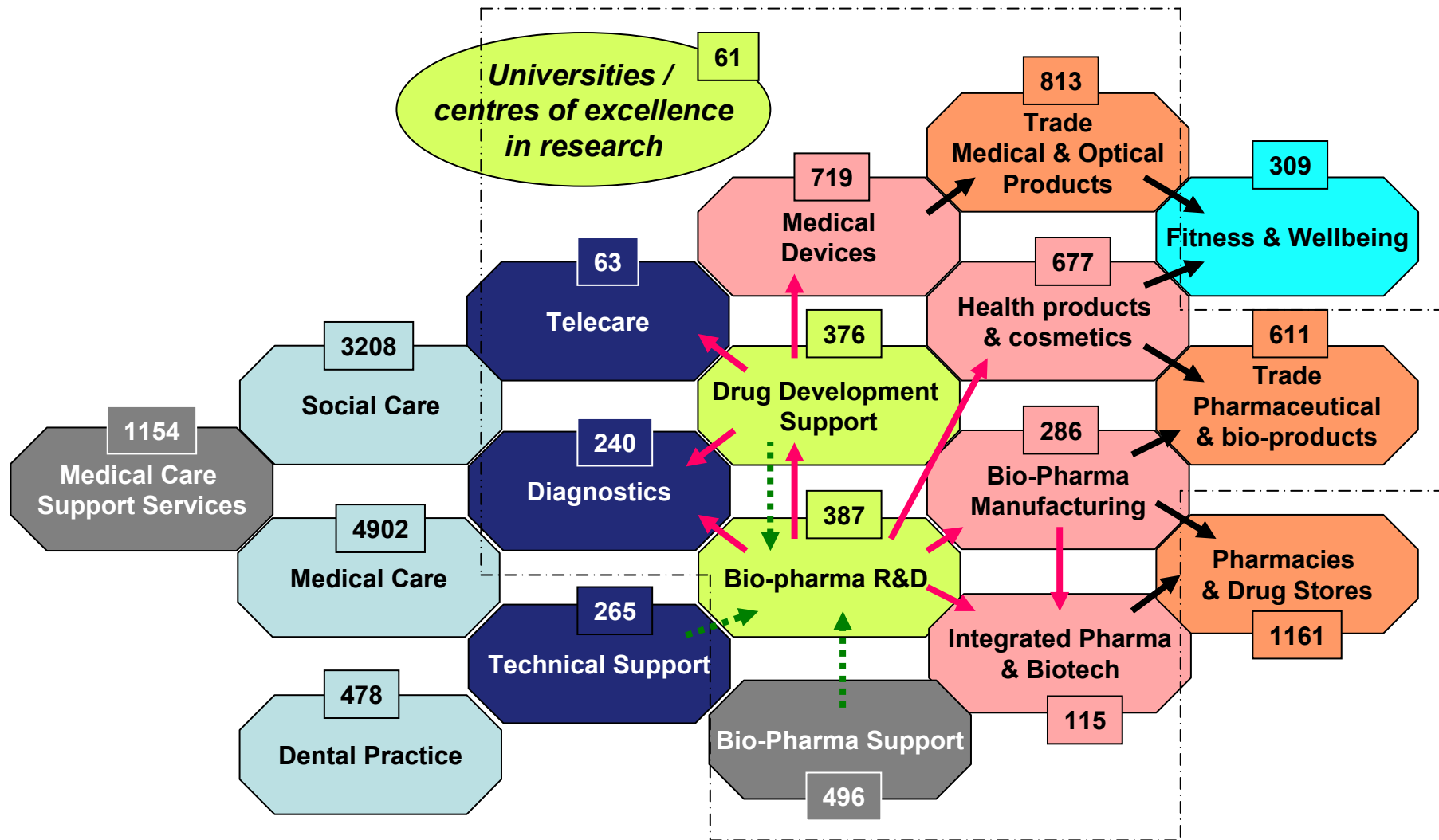


Located in 406 residential areas (London and suburbs, 8 cities, 100 small towns, 247 villages)

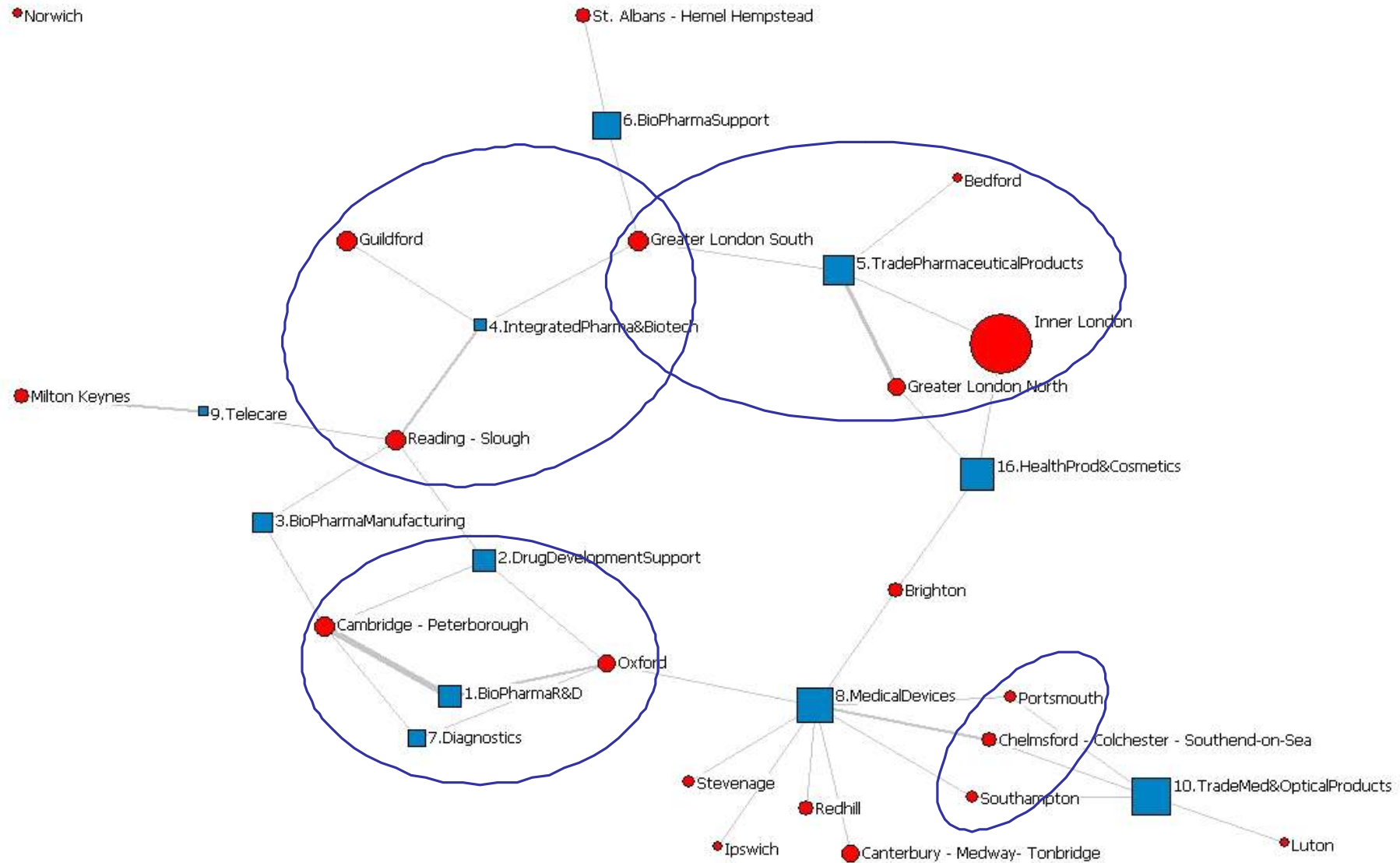
Distributions of Firms in Sub-regions in the GSE

GSE Region	Amadeus Sub-regions	In Core Clusters		In Periphery Clusters		Total in Sub-Region	
		Nb	%	Nb	%	Nb	%
EEDA	Cambridge - Peterborough	317	7%	287	3%	604	4%
	Chelmsford-Colchester-Southend-on-Sea	195	4%	749	7%	944	6%
	Ipswich	45	1%	179	2%	224	1%
	Luton	41	1%	93	1%	134	1%
	Bedford	34	1%	74	1%	108	1%
	Norwich	58	1%	219	2%	277	2%
	St. Albans - Hemel Hempstead	183	4%	279	2%	462	3%
	Stevenage	99	2%	202	2%	301	2%
	Total	972	20%	2082	18%	3054	19%
LDA	Greater London North	262	5%	961	8%	1223	8%
	Greater London South	288	6%	924	8%	1212	7%
	Inner London	1417	30%	3767	33%	5184	32%
	Total	1967	41%	5652	49%	7619	47%
SEEDA	Milton Keynes	157	3%	314	3%	471	3%
	Brighton	149	3%	459	4%	608	4%
	Canterbury - Medway- Tonbridge	271	6%	754	7%	1025	6%
	Guildford	316	7%	628	5%	944	6%
	Oxford	216	5%	210	2%	426	3%
	Portsmouth	113	2%	296	3%	409	3%
	Reading - Slough	341	7%	527	5%	868	5%
	Redhill	156	3%	257	2%	413	3%
	Southampton	125	3%	298	3%	423	3%
Total	1844	39%	3743	33%	5587	34%	
Total	4783	100%	11477	100%	16260	100%	

Clusters or Strategic Industry Groups in the Health Technology Sector in the GSE



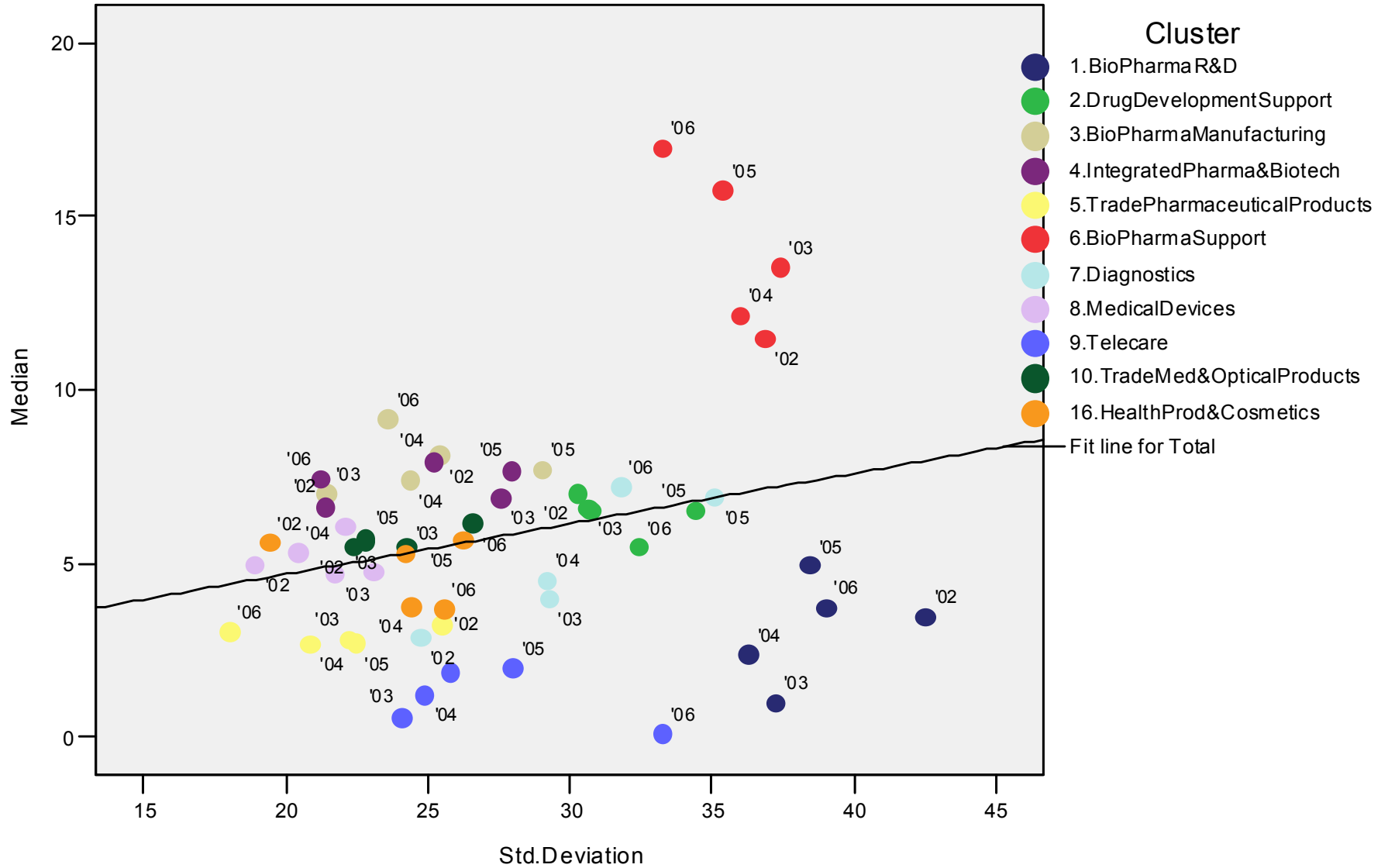
Associations Between Clusters and Regions



Comparative Cluster Performance

Cluster	Median Profit Margins						Coefficient of Variance of Profit Margins					
	t	t-1	t-2	t-3	t-4	t-5	t	t-1	t-2	t-3	t-4	t-5
1.BioPharmaR&D	4,5%	3,7%	4,8%	0,7%	3,5%	3,1%	23,2	11,0	11,3	20,6	8,7	11,1
2.DrugDevelopmentSupport	5,3%	6,8%	6,6%	6,2%	7,4%	6,7%	4,9	3,5	2,9	3,0	3,1	3,0
3.BioPharmaManufacturing	10,5%	7,7%	7,3%	7,2%	7,2%	6,1%	2,0	4,6	3,6	1,6	3,7	6,0
4.IntegratedPharma&Biotech	7,3%	7,8%	7,3%	7,2%	6,9%	5,3%	5,5	17,6	5,1	3,6	2,5	4,6
5.TradePharmaceuticalProducts	2,9%	2,7%	2,7%	3,0%	3,3%	3,4%	2,7	11,7	4,7	4,3	4,4	3,0
6.BioPharmaSupport	15,6%	15,8%	13,9%	13,5%	13,0%	8,1%	1,5	1,4	1,6	1,9	1,5	2,6
7.Diagnostics	6,5%	6,2%	4,3%	3,4%	5,7%	4,5%	2,8	5,1	10,7	6,0	3,4	2,8
8.MedicalDevices	5,6%	5,4%	4,2%	5,2%	5,1%	4,8%	5,5	4,8	5,0	4,4	4,7	2,8
9.Telecare	1,0%	3,1%	-0,3%	0,8%	2,1%	1,3%	-12,1	11,5	-4,0	15,9	9,4	2,3
10.TradeMed&OpticalProducts	5,8%	5,8%	5,9%	5,8%	4,9%	5,3%	2,9	2,5	2,2	2,8	3,6	2,4
16.HealthProd&Cosmetics	4,0%	5,6%	4,2%	5,65	5,6%	4,8%	37,4	4,9	9,8	5,1	6,2	3,1

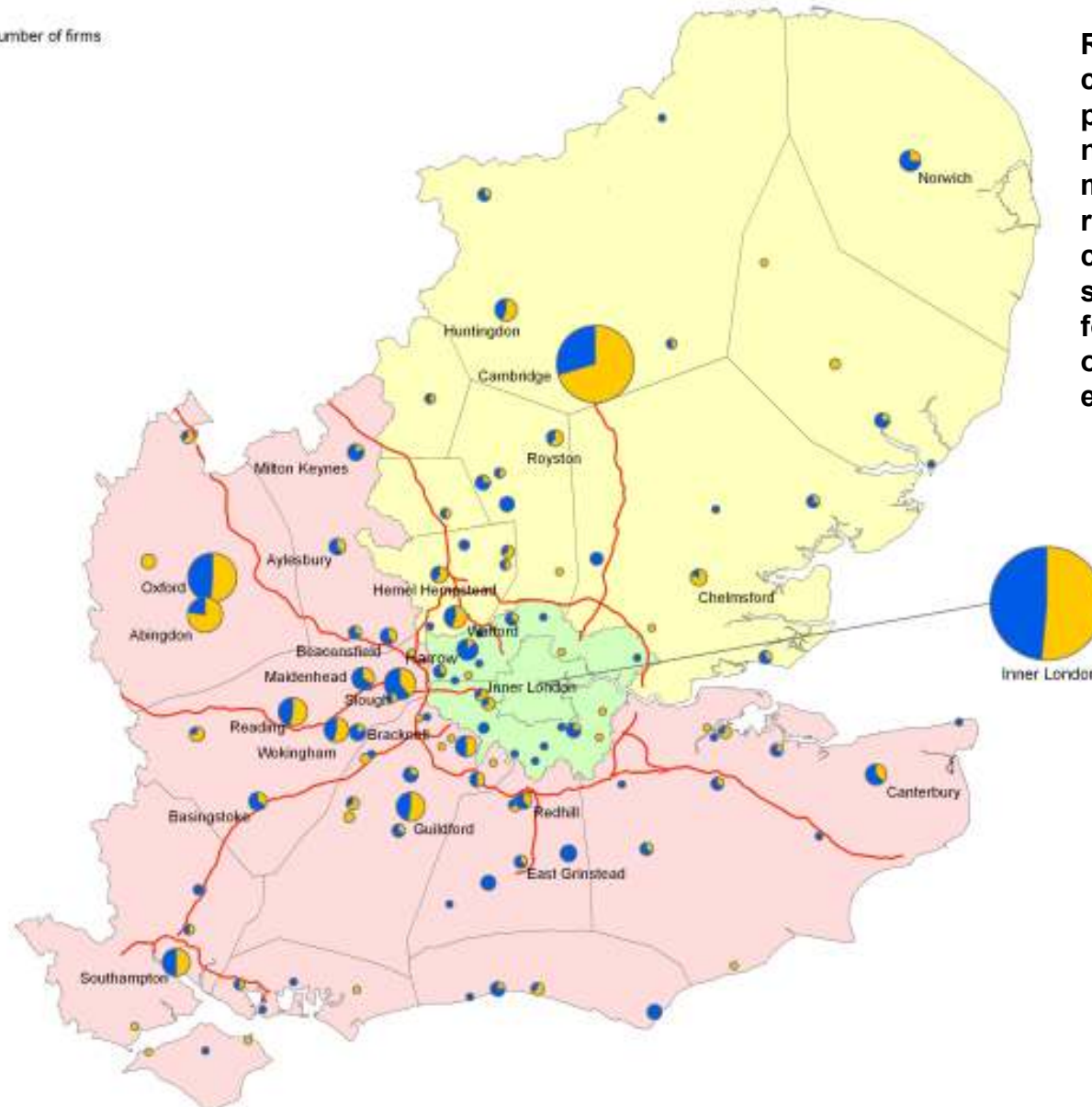
Risk-adjusted Performance



Bio-Pharma R&D Compared with Drug Development & Support

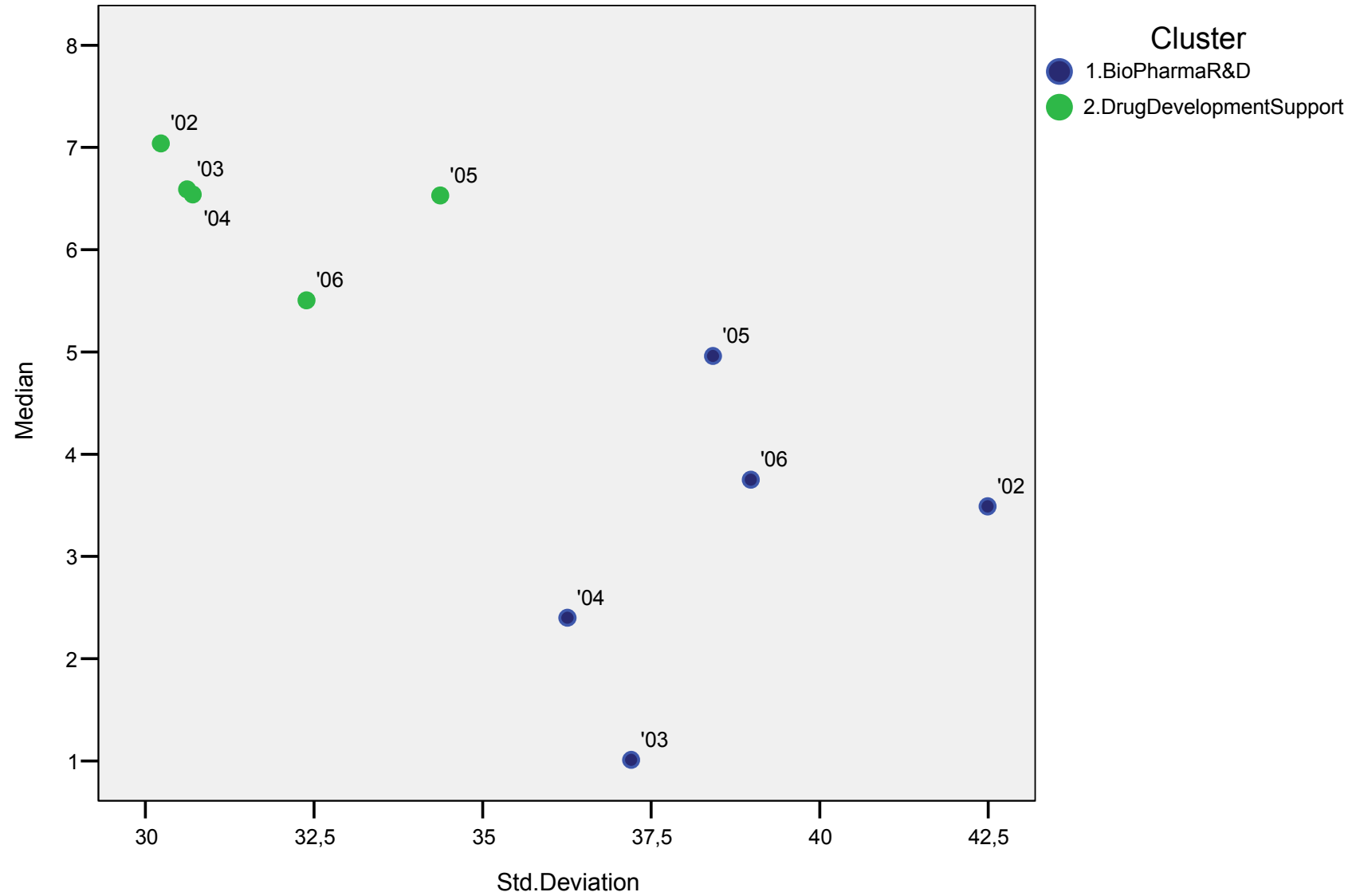
Legend

-  Size is proportionate to the number of firms
-  Bio-Pharma R&D
-  Drug Development Support
-  Motorways
-  Administrative Regions
-  'Town' with 5+ firms

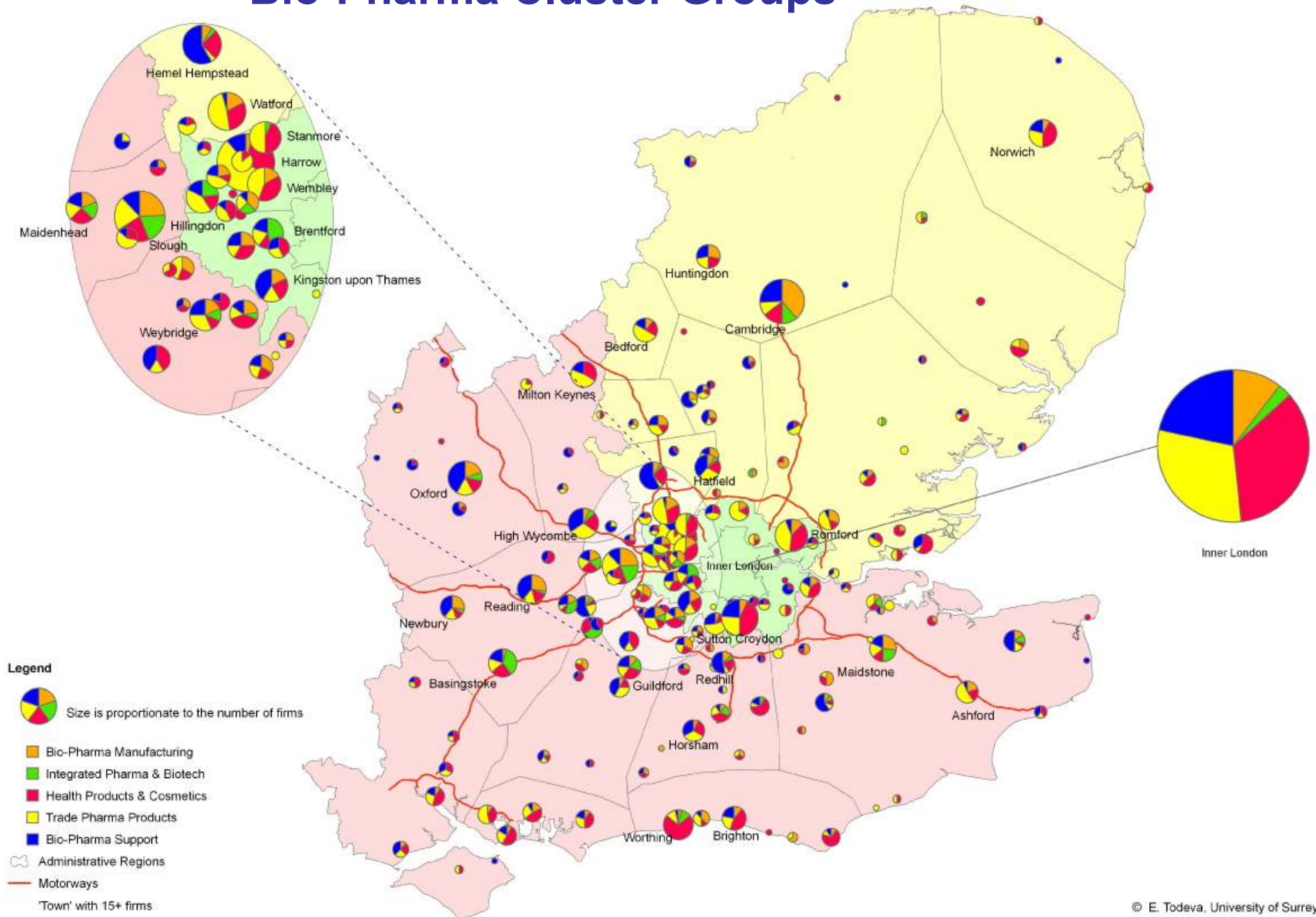


Research supplies, contract research, platform technology, nano-biotech, medical-related research, clinical trials, supportive research foundations, other related engineering R&D

Risk-adjusted Performance



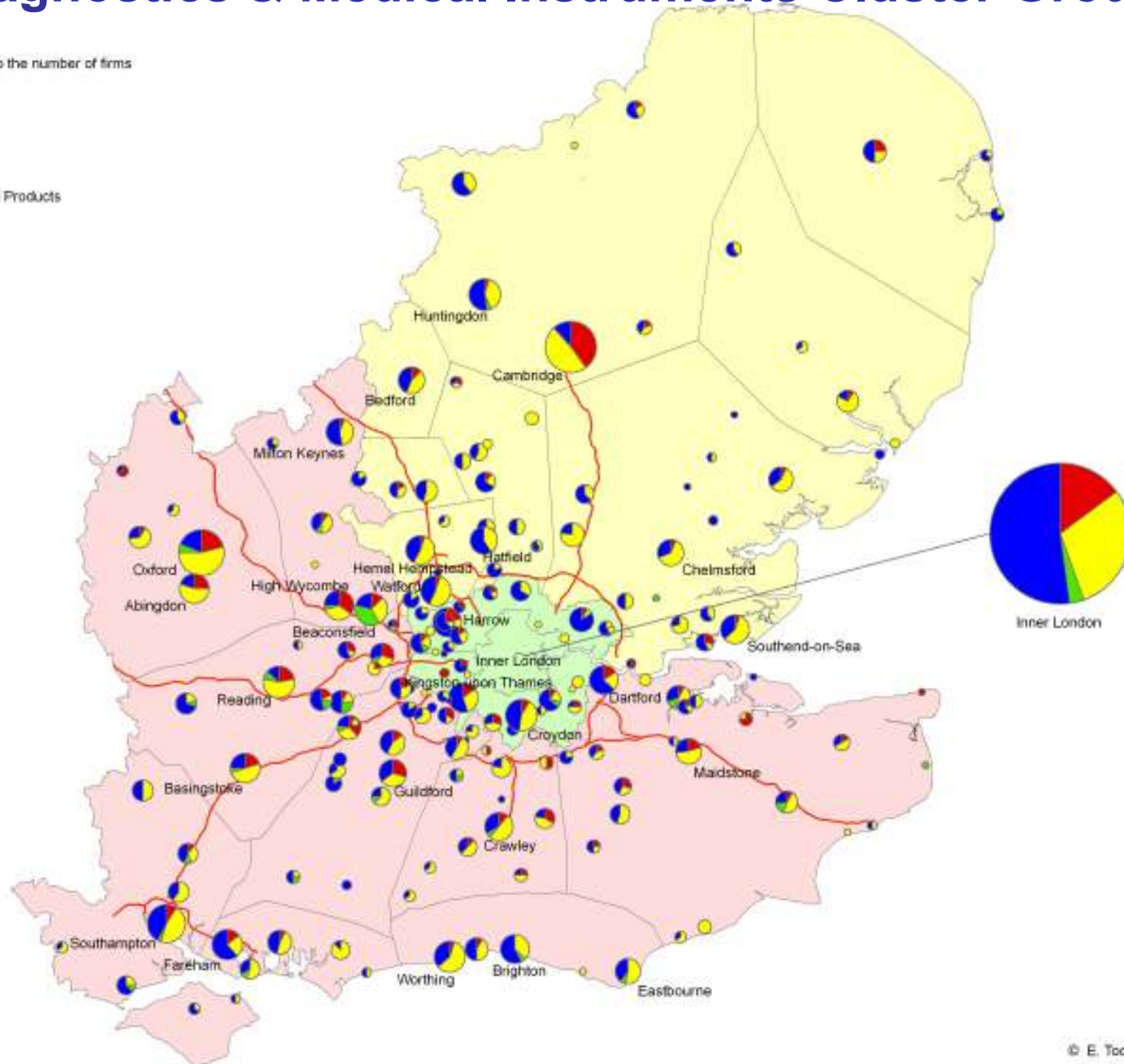
Bio-Pharma Cluster Groups



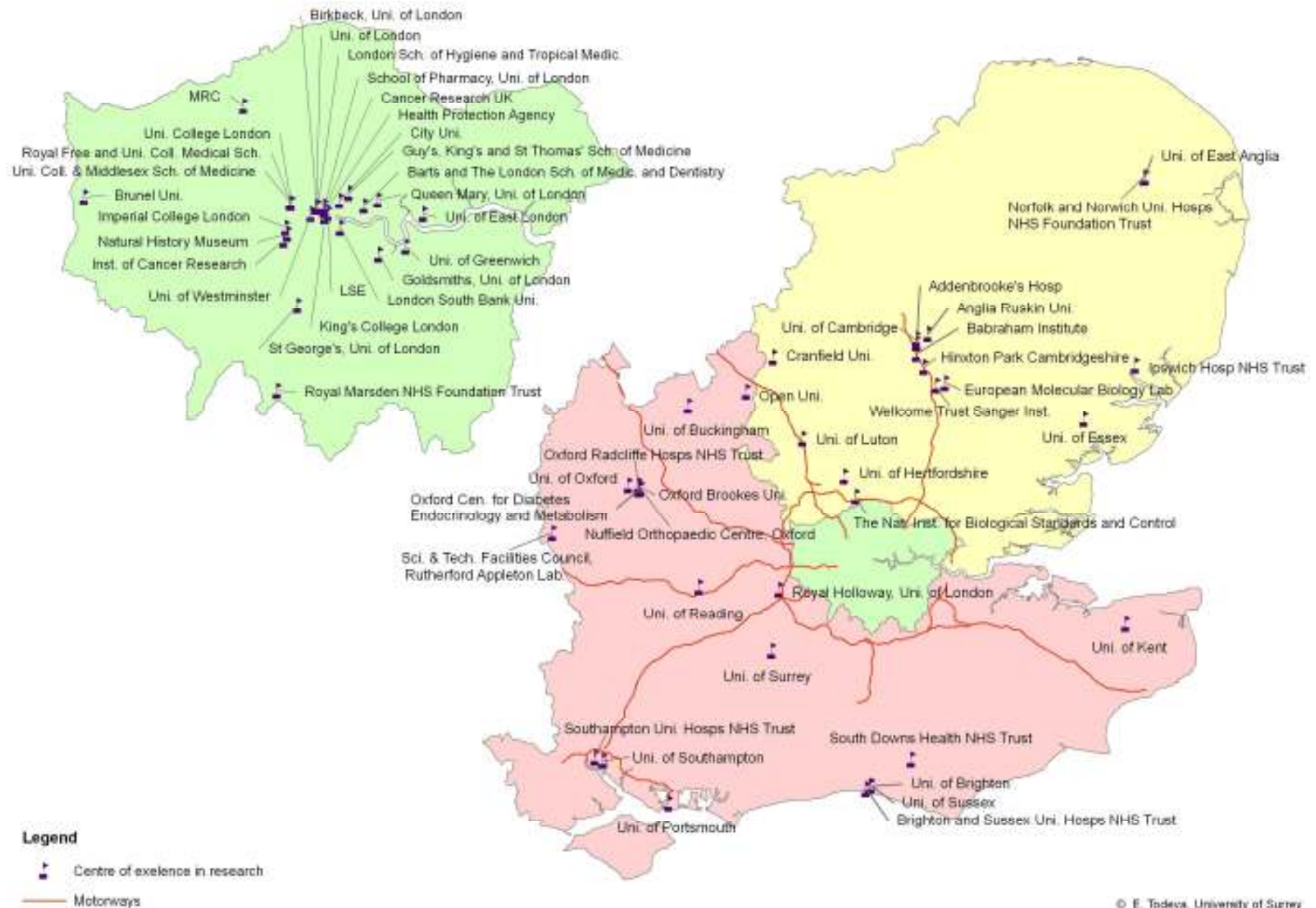
Diagnostics & Medical Instruments Cluster Groups

Legend

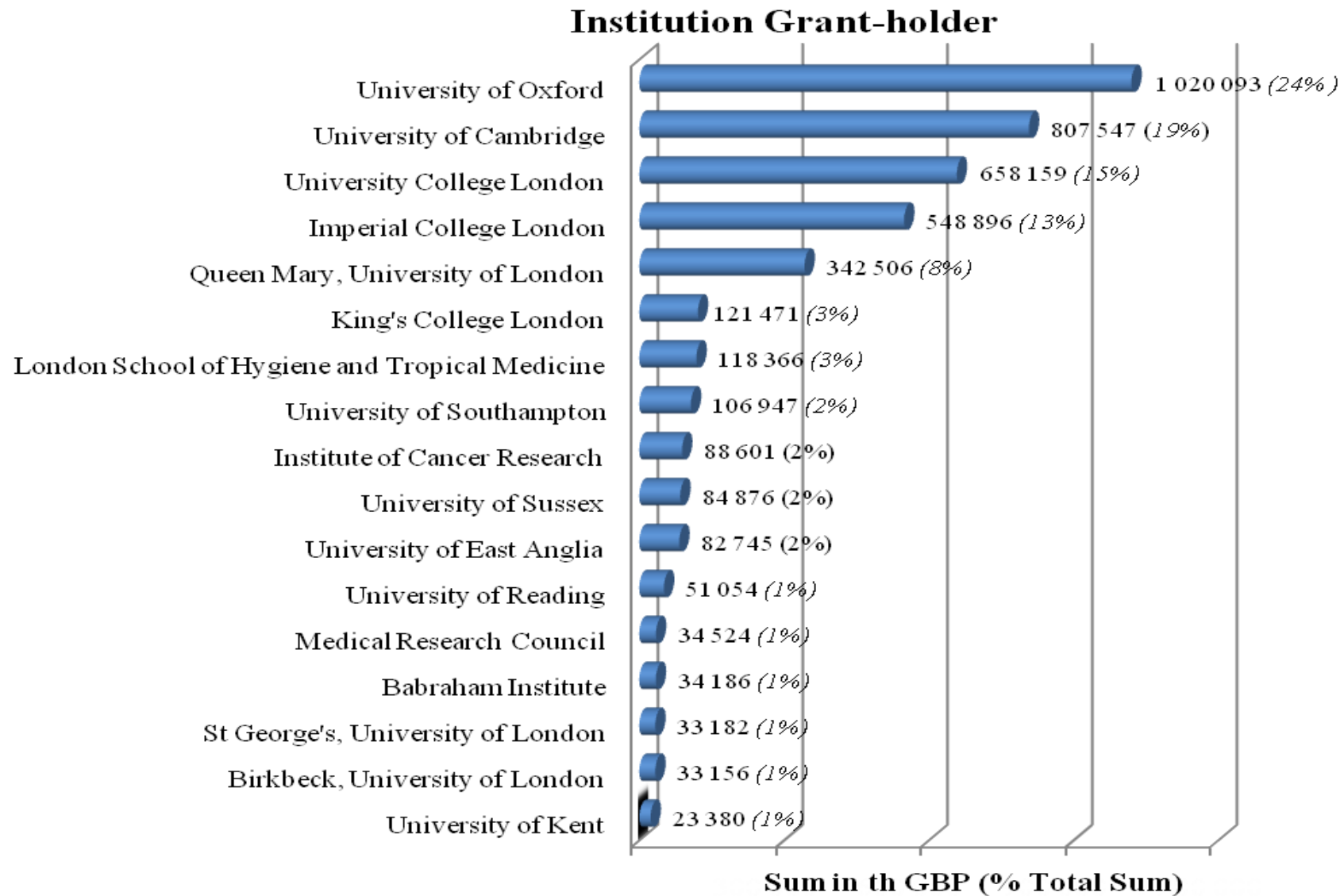
-  Size is proportionate to the number of firms
-  Diagnostics
-  Medical Devices
-  Telecare
-  Trade Medical and Optical Products
-  Motorways
-  Administrative Regions
-  Town' with 15+ firms



Centres of Excellence in Research

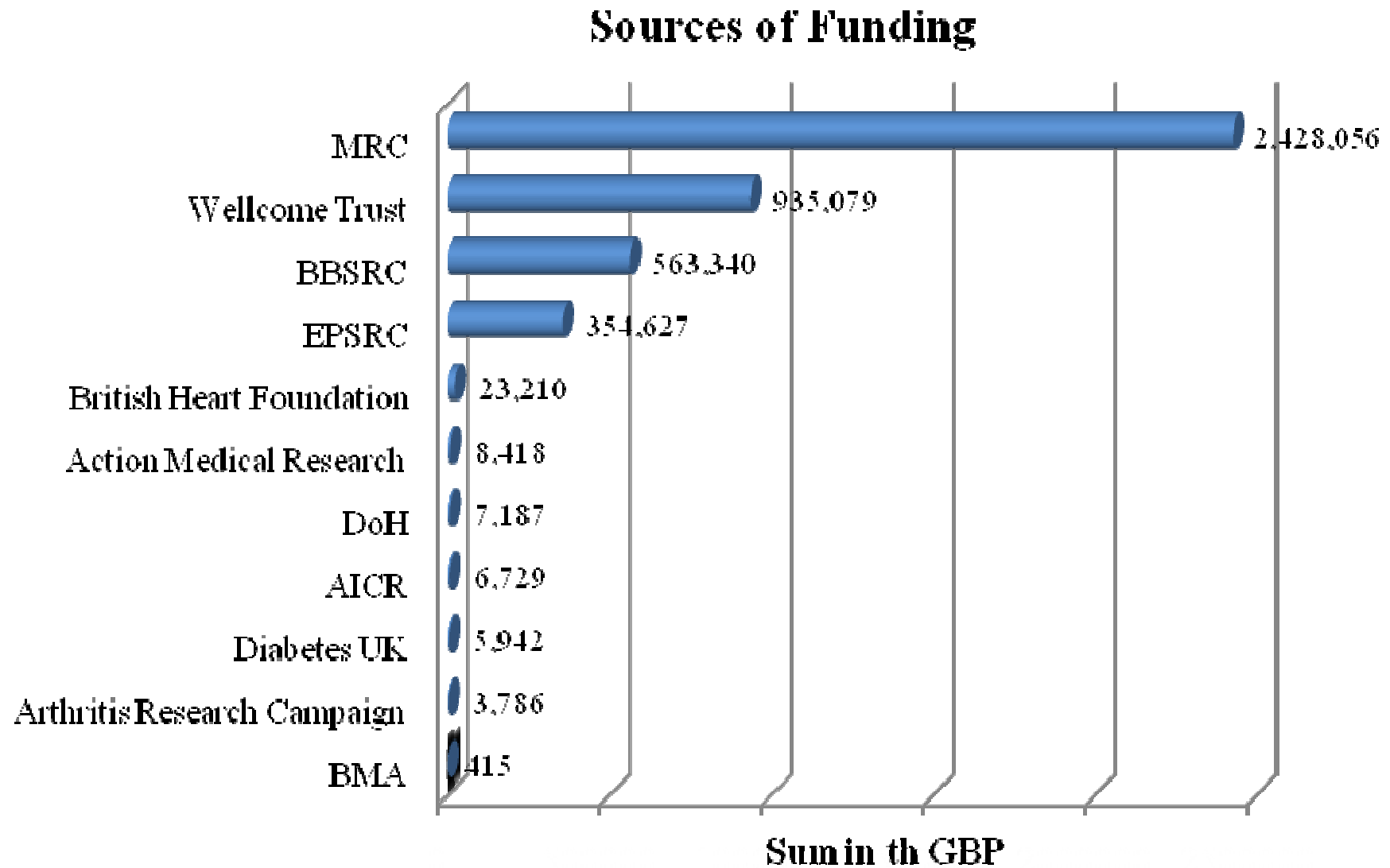


Leading Centres of Excellence in Research in the GSE



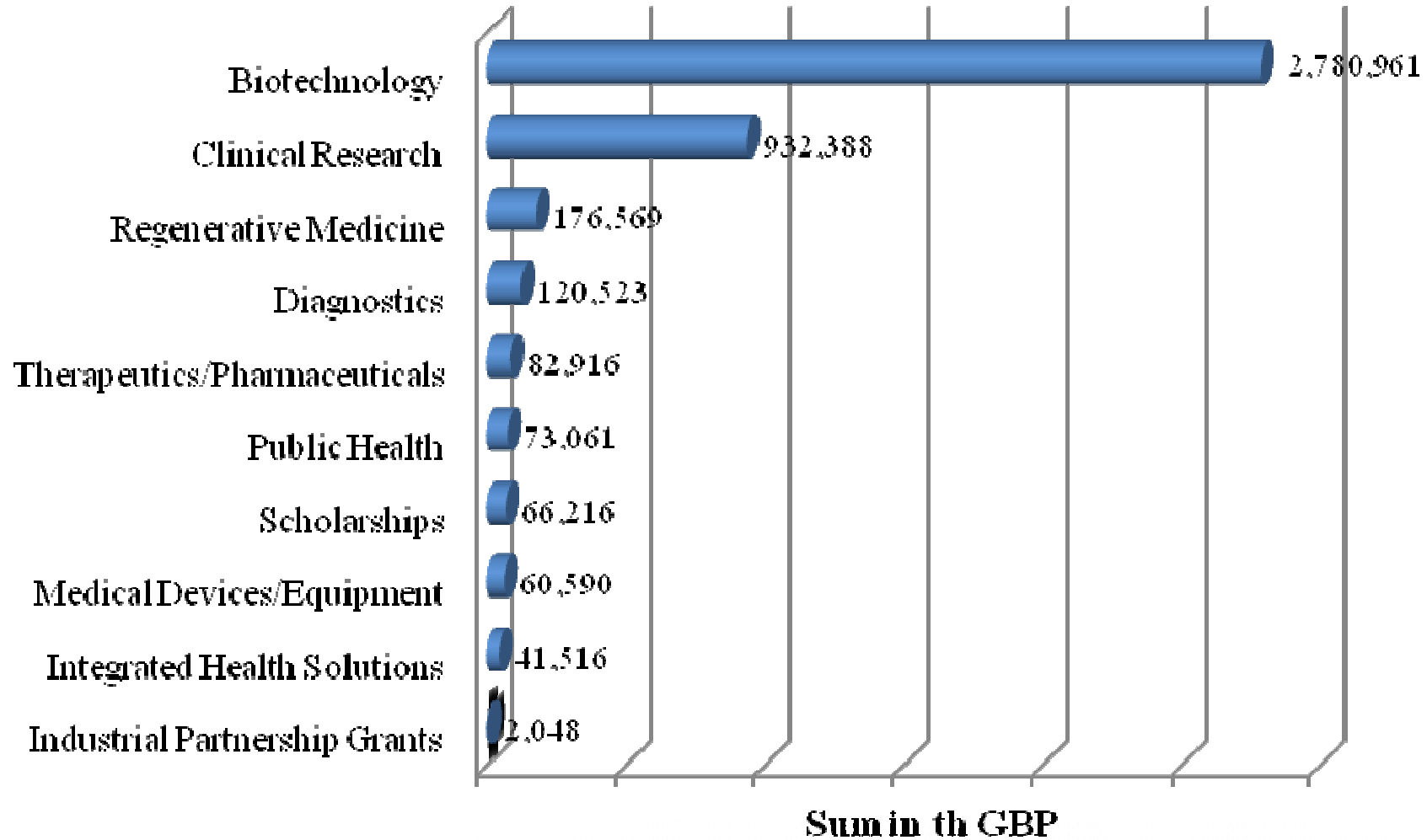
NB: The grant of all other institution is 3% and all of them have less then 0,4%

Sources of Funding for the Centres of Excellence in Research

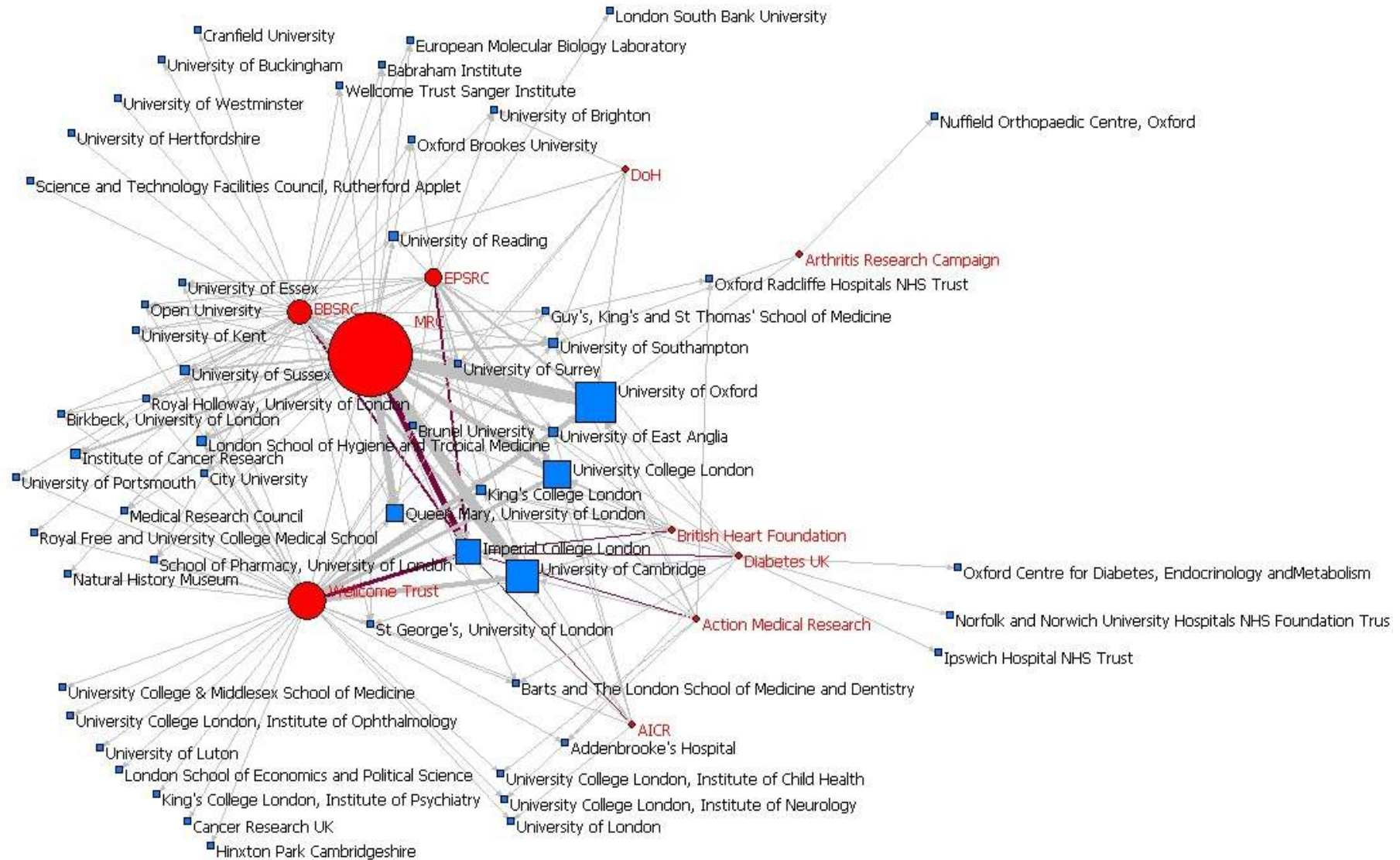


Research Funding for Specific Technologies

Allocation of funding by technology

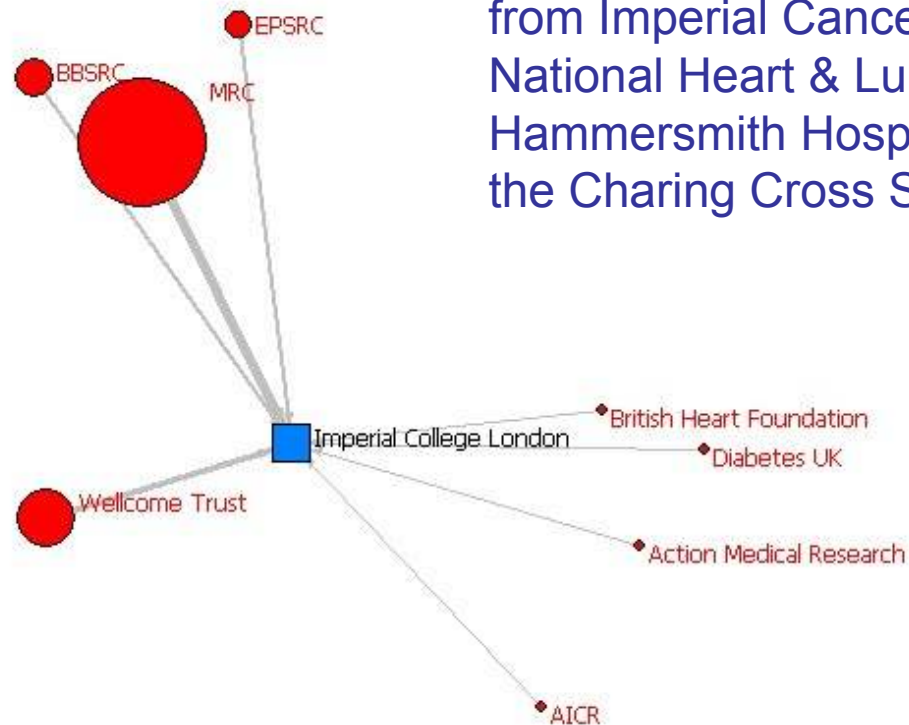


Imperial College Preferences

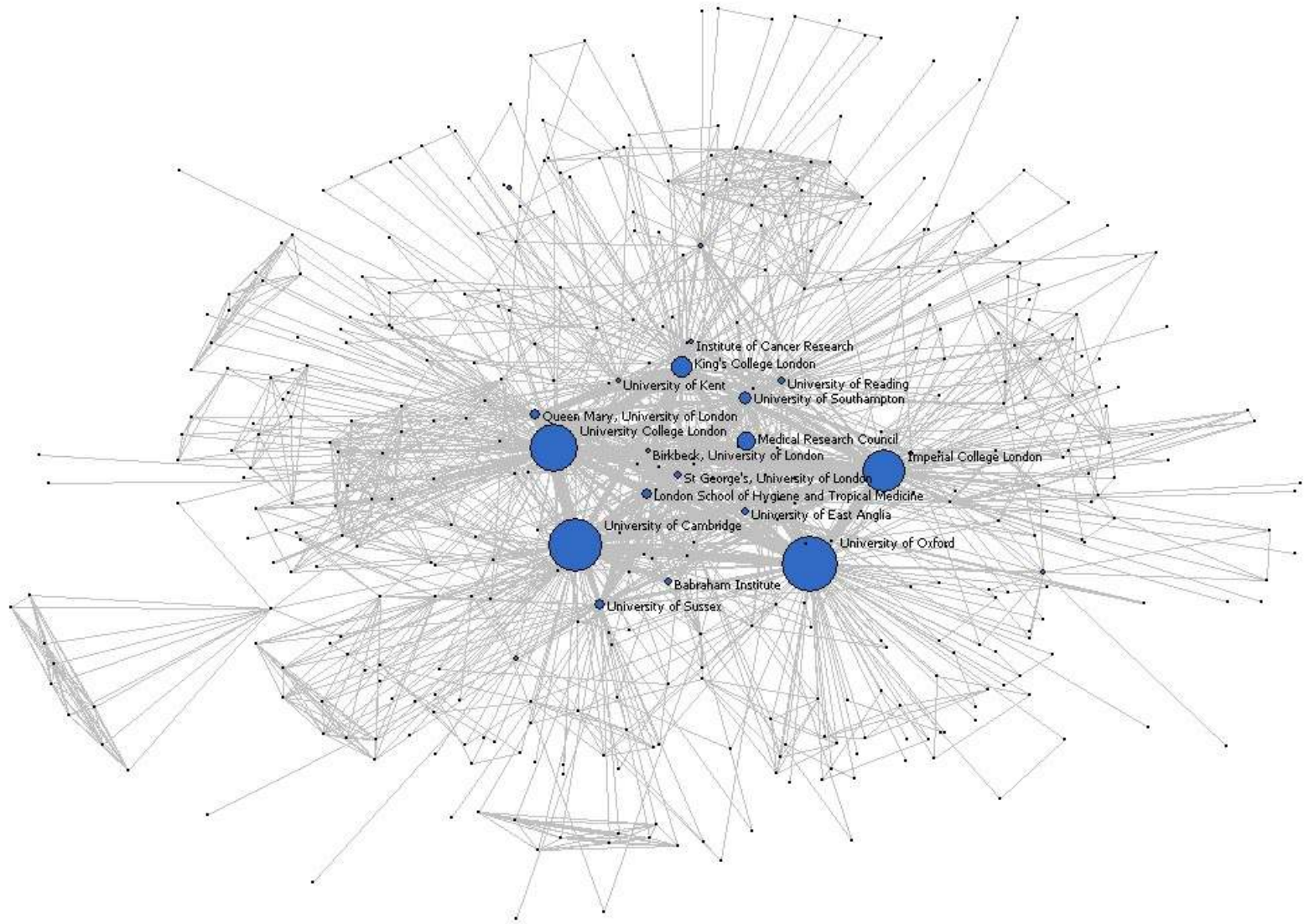


Imperial College Funding

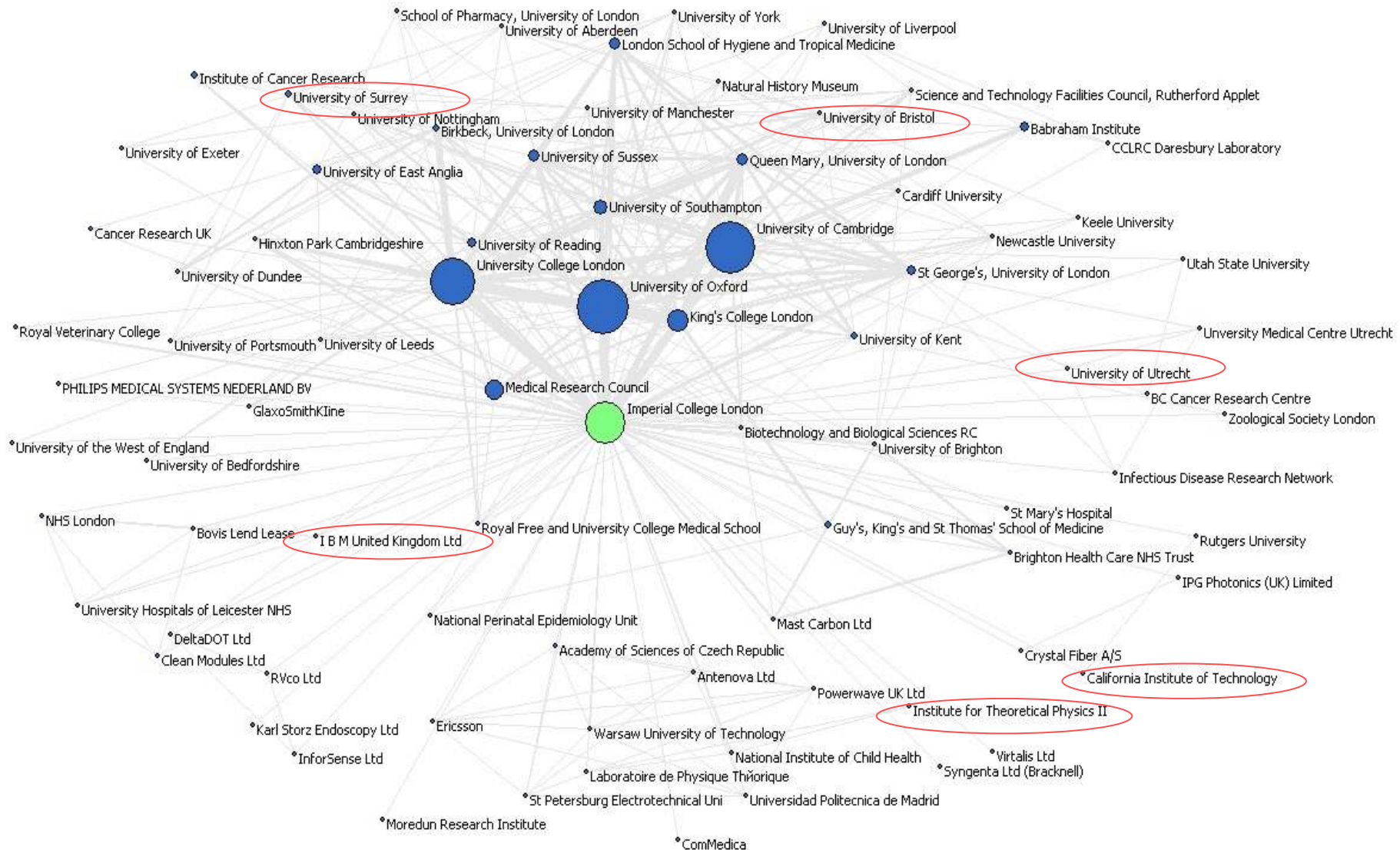
1165 project entries,
≈700 grant holders,
<200 departments & units including
from Imperial Cancer Research Labs,
National Heart & Lung Institute,
Hammersmith Hospital &
the Charing Cross Site



Research Partnerships in the GSE and Globally



Research Partnerships of the Imperial College

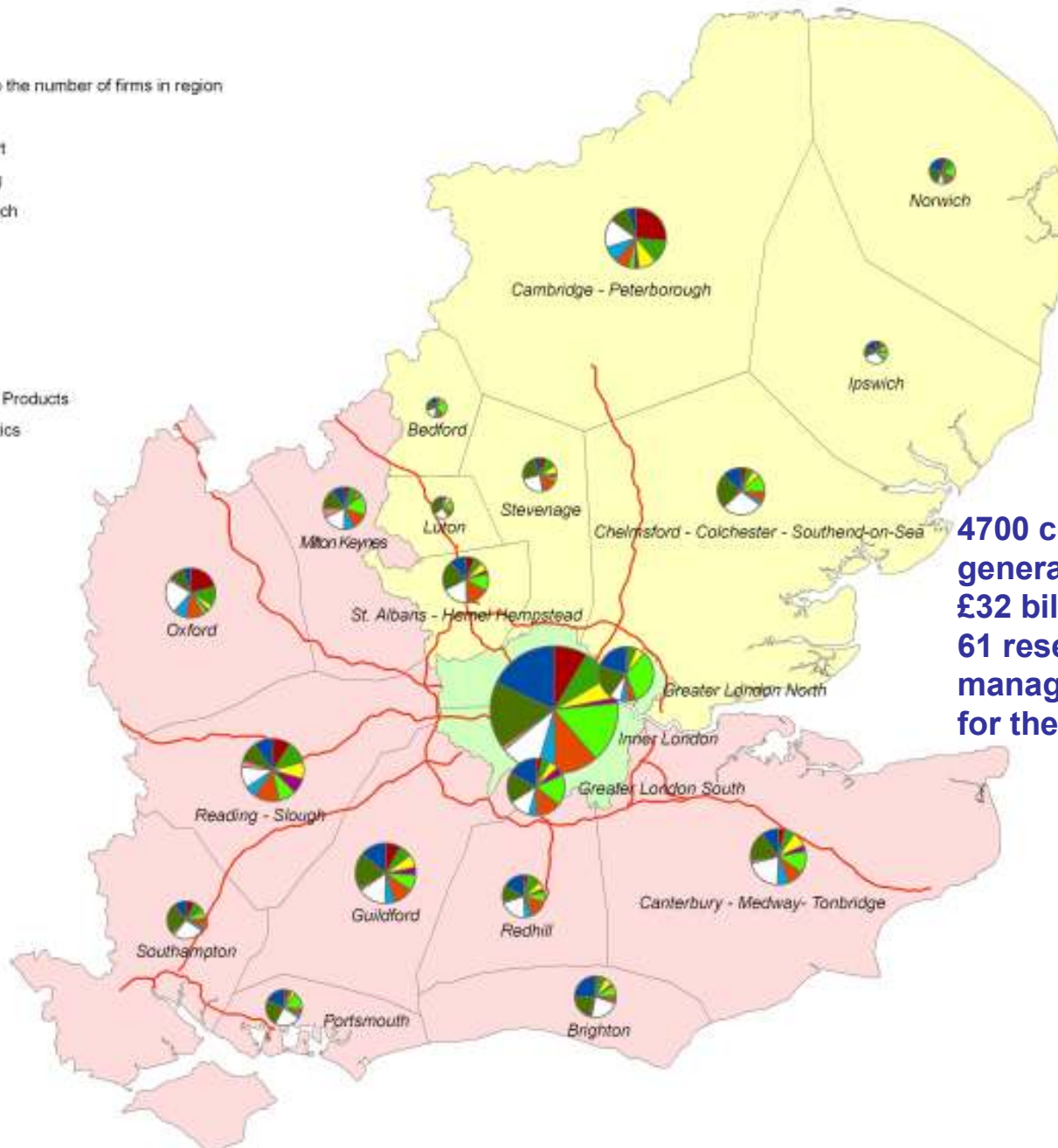


The Value of our Approach

- Building comprehensive databases with research establishments and firms operating in the sector that enable in-depth secondary analysis
- Revealing the unique cluster blend of activities in the GSE region
- Application for Economic / Industry Development
 - Assessment and analysis of cluster performance
 - Analysis of the economic impact of clusters
 - Analysis of intra-cluster and inter-cluster dynamics
- Comparisons of cluster groups and regions
 - Comparisons with other regions and benchmarking
- Communicating regional strengths and capabilities
 - Mapping locations with concentration of capabilities
 - Mapping complex R&D relationships and collaborations
 - Mapping linkages with other regional and global clusters
- Providing business intelligence to firms in the sector and to policy makers
 - Identifying areas of strengths and weaknesses and areas for targeted intervention

The Future of Health Technology Sector in the GSE

Legend



**4700 core companies,
generating
£32 billion in revenue;
61 research establishments
managing 8862 projects
for the value of £4.3 bln**