

Annual Report 2016



Enhancing Lab Science



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1

The Toolpoint Cluster is Developing!

Following the Swiss franc shock in 2015, the industry was quickly able to adapt to the new challenges. 2016 saw markets develop further, with more efficient services being offered. Consolidation continued, which resulted in fewer core members of Toolpoint. We took these trends as an opportunity to survey our members about the future direction of the network. In February 2016 we ran a workshop with the core members and defined the content and services that Toolpoint will provide in future. Based on this feedback, Toolpoint developed a new membership fee model that was adopted at the Annual General Meeting.

Toolpoint will now also address target markets and will aim to hold regular meetings with market participants. For the first time in Toolpoint's history, a meeting with the AEA Analytical User Network was held at Actelion in Basel on 16 June 2016.

Collaboration with neighbouring clusters and networks has been increased. We ran a Microfluidics Workshop with CSEM, BaselArea.swiss, MinacNed and the Swiss Biotec Association at MipTec in Basel on 22 September 2016. We were also able to refer people to many interesting events run by clusters in Germany in 2016.

The digital transformation is gaining pace. Toolpoint members are developing solutions for a wide range of applications. The CEO event, Top of Toolpoint 2016, also focused on this theme. A variety of speakers presented their papers on eHealth. Top of Toolpoint was moved to autumn in 2016, and this year's event will be on 5 October 2017.

Various other events were held in 2016. Detailed information on the topics covered can be found in this annual report. I would like to specifically mention the Symposium on lab automation, which was run by the Institute for Laboratory Technology (ILT) at the University of Applied Sciences Rapperswil (HSR) for the sixth time in 2016. The event was a big success once again, with a record number of exhibitors and visitors. It featured a range of excellent presentations on laboratory technology. Toolpoint was the initiator of this event and has promoted the event from the beginning. In collaboration with the Veronika and Hugo Bohny Foundation, Toolpoint presented the Lab Sciences Award for the best Bachelor's thesis in laboratory technology at the symposium on Lab automation. With this award, we can make young talents aware of good jobs in our industry.

The Toolpoint Team

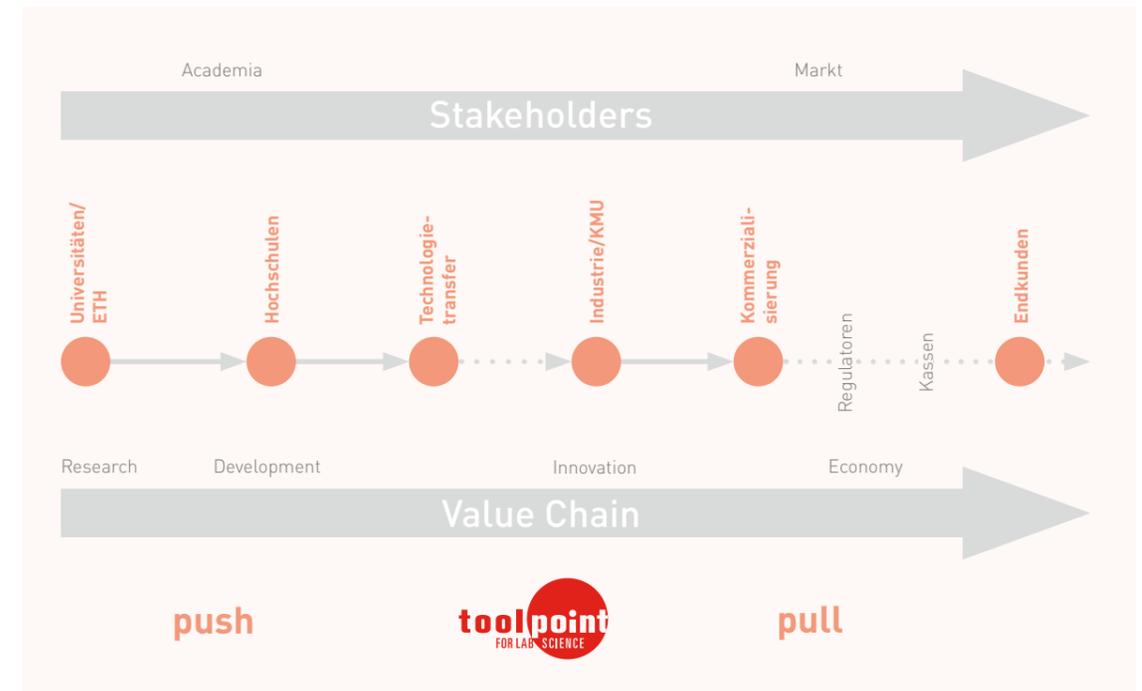


Toolpoint Members 2016



Fig. Toolpoint members

Toolpoint aims to promote innovation in lab automation. We do this by bringing our members together to address current life science themes and market demands. This takes place on a variety of levels. All activities follow the premise that a group of companies can achieve more than a single company on its own.



Active partnerships with academic institutions enable us to keep abreast with current scientific research. By being the contact for client groups, we endeavour to identify common topics and implement them together with our members. For example, this led to www.sila-standard.org and the "Development of Standard Test Procedures for Quantifying Carry Over from Fixed Pipetting Tips in Liquid-Handling Systems".



2

Information on Fields of Application (HN)

Toolpoint's activities and services can be divided into six fields of application. These correspond to the structure used in cluster theory:

- 2.1 Innovation and Technology
- 2.2 Networking
- 2.3 Education/Human Resources
- 2.4 Commercial Collaboration
- 2.5 Policy Action
- 2.6 Cluster Expansion

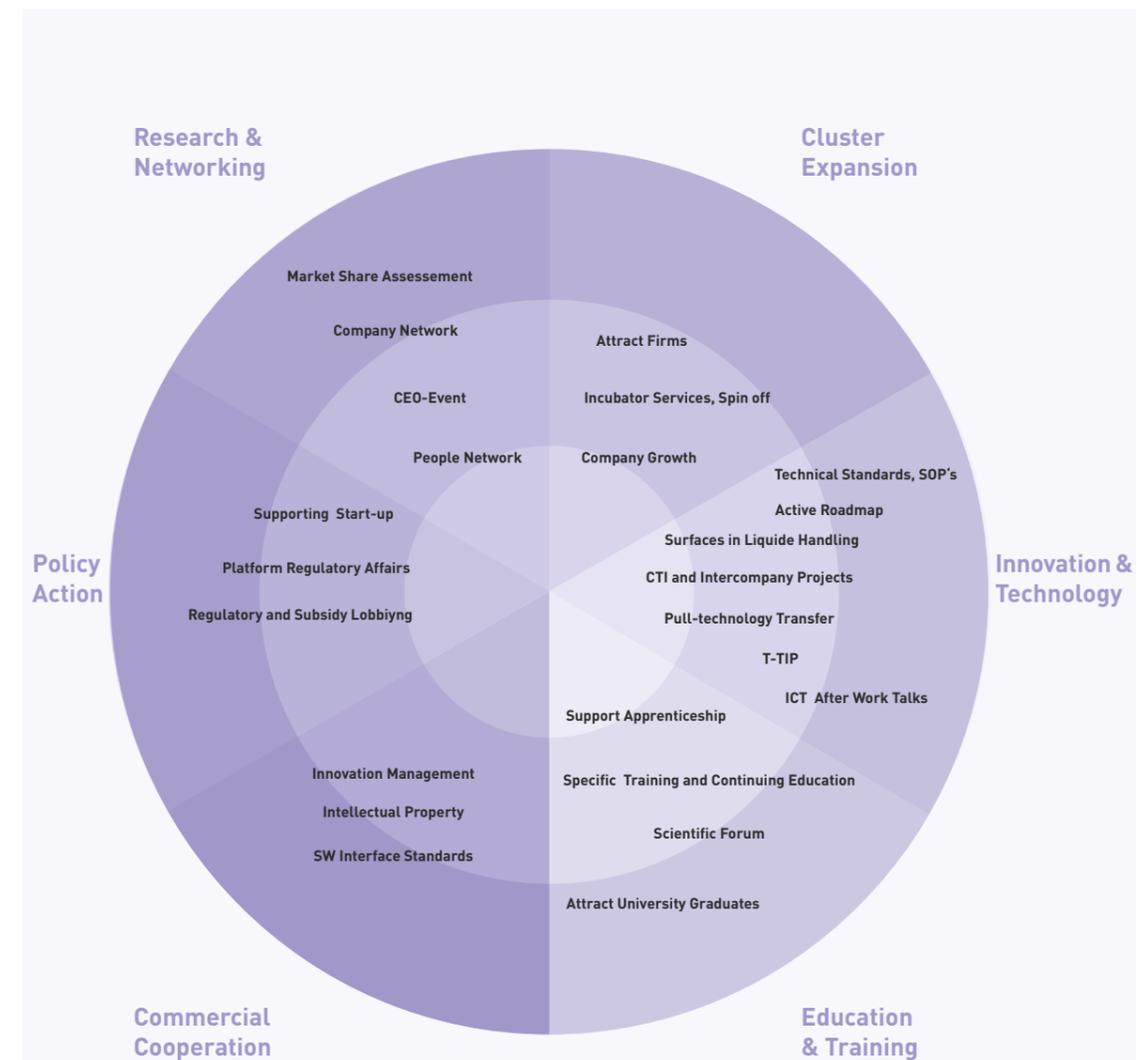


Fig. The Cluster Initiative Target Board by Örjan Sölvell, Göran Lindqvist and Christian Ketels, extract from The Cluster Initiative Greenbook (Stockholm: Bromma tryck AB, 2003) 27, supplemented by Toolpoint-specific services.



2.1 Innovation and Technology

Our well validated Technology Assessment Process again formed the basis for the survey of members' needs. The process relies on 1:1 feedback and dialogue and is conducted twice a year, with the aim of identifying common interests by gathering information about individual companies' future requirements. The results of the feedback dialogue and the findings of trend analyses were then consolidated and presented anonymously to the member companies. Common denominators emerged during the course of this process, providing indications as to whether there is sufficient support for new projects and proposals in the members' community. To secure the necessary expertise, academic institutions and external companies were involved in the assessment process. Based on this, potentially interested member companies can decide whether they wish to participate in the evaluation stage, help to determine specific goals and budgets, and ultimately decide whether or not to take part in the final project.

The process is shown schematically in the diagram below:

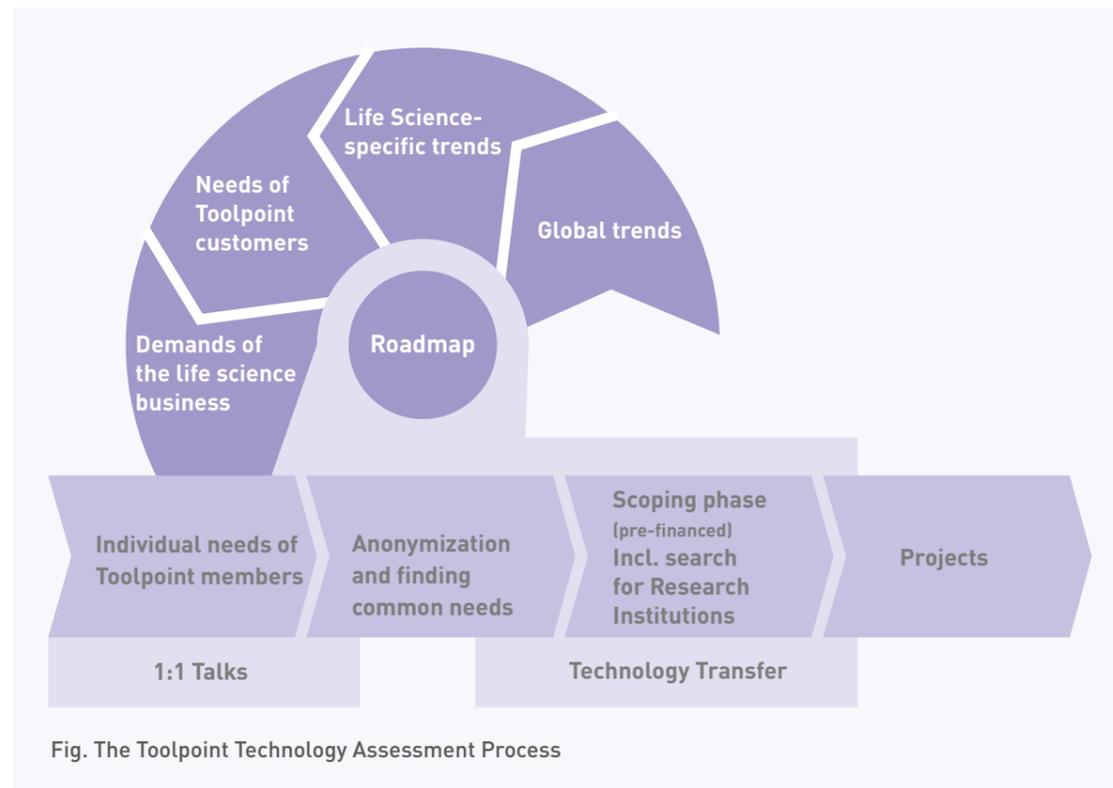


Fig. The Toolpoint Technology Assessment Process

2.1.1 Current Technology Projects (overview)

Numerous projects carried out since Toolpoint was founded

Since the founding of Toolpoint, 33 projects have been carried out in relation to Toolpoint activities. After the process of evaluation by our members, 17 of these projects were converted to the scoping phase. 13 projects were considered to have no possibility of being completed successfully.

The reasons why four projects were eliminated between the scoping phase and project phase are as follows: one project was integrated into another project, one project was considered to be too competitive and two projects are on hold.

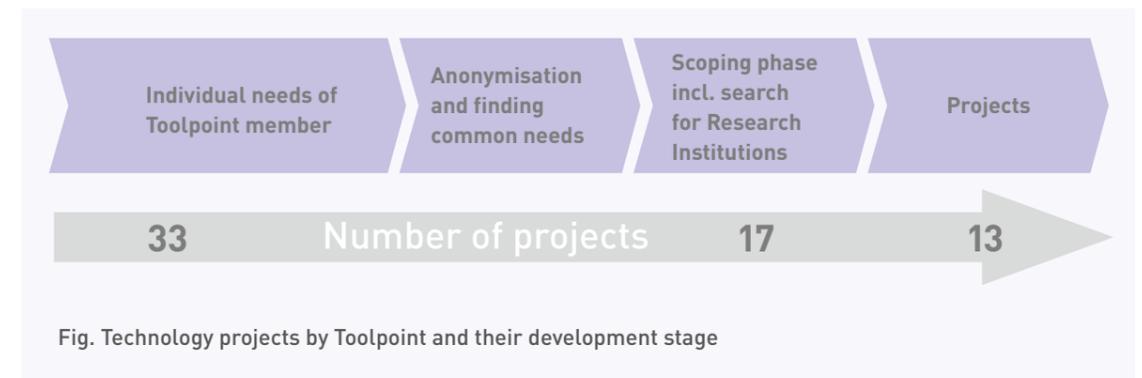


Fig. Technology projects by Toolpoint and their development stage

2.1.2 Further Activities

The Swiss Symposium on Lab Automation was held for the sixth time on **Thursday, 17 March 2016**.

The focus of the sixth anniversary was 'Laboratory 4.0'. As well as an exhibition of the latest products and technologies from various companies and institutions, the event was also a place to exchange knowledge in the field of laboratory automation. In addition, it offered an informal environment where networks and personal contacts could be enhanced and extended. The specialist presentations by well-known figures from leading companies in the life science sector provided new ideas and information on future trends and developments in the life science industry.



Image: Mettler Toledo robot



Image: Zühlke Robot

IVD Industry Connectivity Consortium (IICC):

Toolpoint is still a 'General Interest Member' of the IICC:

SystemsX.ch

Toolpoint is still in contact with SystemsX. Toolpoint acknowledges that the system biological approach pursued by SystemsX is trend-setting. The collaboration and the shared network should bring the parties involved the following benefits:

For the industry: formulating visions, generating valuable input for improving measurement and robotic systems and developing innovative products for the future;

For SystemsX/academic institutions: identifying expertise available within the industry and potential future partners for joint projects;

For both parties: pioneering innovative developments related to, or inspired by, systems biology and related fields, e.g. synthetic biology.

Competence Centre for Medical Technology (CCMT)

Toolpoint remains connected to the Swiss Med Tech Cluster. The collaboration is based on using synergies and on supporting each other's activities. Toolpoint publishes all activities of the Swiss Med Tech Cluster which may be of interest to our members.

2.1.3 Scientific Forums

We plan to structure the scientific forums so that we can visit interesting teams and locations in future. This activity is currently being developed. We will combine these activities with other organisations to maximise synergies. For example, we visited the 'Biointerfaces International 2016' event in Zurich on 23 August.

The scientific forums are sponsored by:



**Office for Economy and Labour
of the Canton of Zurich
Economic Development**

2.2 Networking

2.2.1 Annual AEA LCMS User Meeting

The AEA Analytical User Network invited members to its LCMS User Meeting on 16 June 2016. Toolpoint members also took part in this event. Around 80 people attended in total, and discussed developments in the LCMS environment and application projects in the pharmaceutical sector.

An idea for a new network was discussed at the beginning of the meeting: the Basler Analytical Forum, which would be developed as an open network for users and suppliers. The aim is to encourage innovation in analytics through dialogue between manufacturers and suppliers. Following the event, participants will be asked whether they are interested in joining a network along these lines.

The AEA network will continue in its current form. The objective of the AEA network is to enable users of measurement analysis to meet regularly and exchange ideas.

As well as Toolpoint, SiLA and AnIML also gave presentations on the supplier side at the event on 16 June 2016. Standards and the ability to develop these where they are needed are important requirements for innovative application solutions. Networks such as Toolpoint are well positioned to launch this kind of project. The development of SiLA was a good demonstration of this. Networking of users and suppliers is the starting point for the development of standards that serve innovation in applications.

Toolpoint will continue to seek dialogue with user networks and organise relevant meetings.

2.2.2 Microfluidics Workshop 2016

CSEM and its partners BaselArea.swiss/i-net innovation networks and Minacned in cooperation with the Netherlands Embassy, Swiss Biotech Association and Toolpoint, all joined forces to organise this one-day workshop.

It followed successful events in Basel in previous years, organised by CSEM and i-net innovation networks. Delegates from the Netherlands and Switzerland – including some prominent industry leaders – joined the workshop and provided critical technological insights and the latest updates on the global microfluidics industry, as well as current developments in microfluidic applications.

The keynote presentation was given by Professor Andreas Manz, Korea Institute of Science and Technology (KIST). Professor Manz is a pioneer in the field of microfluidics; he was recently recognised by the European Patent Office for his lifetime achievements in the medical and life sciences sector.

The Basel Microfluidics Workshop 2016 was a side event to the Basel Life Science Week Miptec / Ilmac in Basel (Messe and Congress Center) on 19–23 September.

Hans Noser gave an elevator pitch in the morning during the Opening/Key Note Session together with the organising partners. Ulrich Kanter was the chairman during the moderated panel discussion on lab automation and instrumentation.

2.2.3 'Top of Toolpoint' CEO Event

The regular Top of Toolpoint event took place for the thirteenth time. This time the host was Zunfthaus zur Schmiden in Zurich. The theme this year was eHealth. What exactly does eHealth mean for the industry, what new opportunities do these technologies open up, and what challenges will we need to face in the future?



Image: Speech by Christoph Gugl, Helbling Technik AG



Image: Top of Toolpoint networking reception

Top of Toolpoint

2016

Personal invitation for

eHealth

Zunfthaus zur Schmiden, Marktgasse 20, 8001 Zurich
October 6th, 2016, 4:00 p.m.

Time	Speaker	Theme
4:00 p.m.		Arrival of the Guests
4:15 p.m.	Dr. Michael Collasius Chairman Toolpoint	Address of Welcome
4:30 p.m.	Dr. Stefan Sigrist Head and Founder of W.I.R.E	Hacking Healthcare/ Theses on Data based Medicine
5:00 p.m.	Mr. Christoph Gugl Head of Integrated Care, Helbling Technik AG	Enabled by Digitalization
5:30 p.m.	Dr. Florian Wegener Vice President Global Head of eCommerce Qiagen	eCommerce in the Life Science and Health Care Business
6:00 p.m.	Break	Networking
6:15 p.m.	Mrs. Isabelle Flückiger Director Data&Analytics and Actuarial Services Leader at PwC Switzerland	Predictive Healthcare is a Game Changer
6:45 p.m.	Hans Noser Managing Director Toolpoint	Open forum
7:15 p.m.		Apéro riche
9:00 p.m.		End of the Event

Partner
AON **PwC**

2.2.4 Lab Sciences Award

On 17 March 2016, we presented the Lab Sciences Award at the Swiss Symposium on Lab Automation at the University of Applied Sciences Rapperswil for the third time.

The prize of CHF 14,000 is awarded to outstanding Bachelor's degree graduates each year by the Veronika and Hugo Bohny Foundation. With the prize, Hugo Bohny aims to emphasise the importance of good education for a country's competitiveness and its future security.

In collaboration with Toolpoint, graduates are selected who have completed a thesis in lab sciences, including medical diagnostics, together with a company.

In addition to the thesis, an oral presentation to the jury has a strong influence on the selection process. The jury members are: Hugo Bohny, Valentin Vogt, Marc Schindler, Stephanie Mathes, Stephan Scheidegger, Alex Simeon, Rudolf Marcel Fuchsli and Evelyn Orbach-Yliruka

The winners in 2016 were

Simon Castelberg, Sebastian Lang, NTB Interstate University of Applied Sciences Buchs
'Signal processing and data mining in impedance flow cytometry'

Claude Flury, HSR University of Applied Sciences Rapperswil

'Development of a low-cost micro-valve for life science applications'

Dominik Richte, Pascal Stump, HSR University of Applied Sciences Rapperswil

'LLD with a 96 multi-channel pipetting head'

We hope that companies in our industry will continue to support us, as another objective of our activities is to highlight the importance of our sector to students and the general public. The next ceremony will be held at the same location on 16 March 2017. Applications for 2018 can be submitted via www.toolpoint.ch.



Image: Lab Sciences Award winner 2016, Hugo Bohny (Founder of the Veronika and Hugo Bohny Foundation), Philip Mosimann (SwissMem Association VP)



Image: Finalists and mentors of the Lab Sciences Awards 2016, Founder of the Veronika and Hugo Bohny Foundation, Hugo Bohny, SwissMem Association VP Philip Mosiman and Lab Sciences Award project manager Evelyn Orbach

2.2.5 Life Science Zurich

Life Science Zurich is a joint venture initiated by the University of Zurich and ETH Zurich to promote Zurich as an international centre for cutting-edge research, first-class education and economic innovation in the field of life sciences.

Life Science Zurich (LSZ) establishes cooperation networks that bring together the major stakeholders in academia, industry and the public sector. LSZ supports a strong and modern life science curriculum in primary and secondary education. LSZ aims to offer one of the best doctoral schools worldwide in the field of the life sciences, and to prepare young researchers to develop into tomorrow's leaders in life science research, industry and society. In addition, LSZ stimulates dialogue between academic institutions, the wider public and industry and creates an atmosphere of mutual understanding, respect and trust.

Toolpoint is a member of the Life Science Business Network.

2.2.6 ELRIG

Toolpoint cultivates ongoing exchange and contact with ELRIG (European Laboratory Robotics Interest Group).

2.2.7 SBA

Toolpoint is a member of the Swiss Biotech Association and is regularly represented at the General Assembly.



2.3. Education

2.3.1 Human Resources Expert Group

The Human Resources Expert Group met twice in 2016 and addressed the following topics in depth in half-day workshops:

In spring, there was lively discussion on the topics of 'How do we engage with Generation Y in our company?' and 'Active sourcing – what are we doing in our company, and how?'. The autumn workshop focused on 'wage negotiations, salary and bonus systems and salary studies'. The workshops were opened by keynote speeches, followed by stimulating dialogue among the participants on best practices. As the choice of topics are agreed with the HR professionals in advance, keen interest and lively debate are always guaranteed.

The activities of the HR Expert Group described above constitute an important pillar in Toolpoint's HR activities. The Toolpoint HR strategy (see graphic) was developed in 2014 and has proved its worth in 2015 and 2016.



Image: Polymesse at ETH Zurich in April 2016

HR activities for all members

Toolpoint works for all its members, with activities including the Lab Sciences Award and networking with the academy. This is the third pillar of our HR strategy. The job exchange was another new project introduced in 2015. All members can easily link to the job ads on their company website from the Toolpoint website (see 'Career/Job board'), amplifying their recruitment activities. All of Toolpoint's HR activities (see graphic) enable members to raise graduates' awareness of the lab science industry, increasing the chances of securing the best talent in the future.



Fig. HR Expert Group: Overview

Graduate fairs

We had a Toolpoint stand at ZHAW in Winterthur and the Polymesse at ETH Zurich in 2016. One or two members were at each event, bringing their companies closer to the graduates. There was a lot of interest in the laboratory equipment, which was an engaging eye-catcher. The Toolpoint team was able to have around 250 discussions with students. The Toolpoint brochure with company profiles was distributed for the second time. The brochure met with great interest and should be considered a definite success. It will therefore be reprinted for 2017 with the inclusion of additional members. At the Toolpoint stand, we were also able to cross-refer many students to our members who were also represented at the fairs.

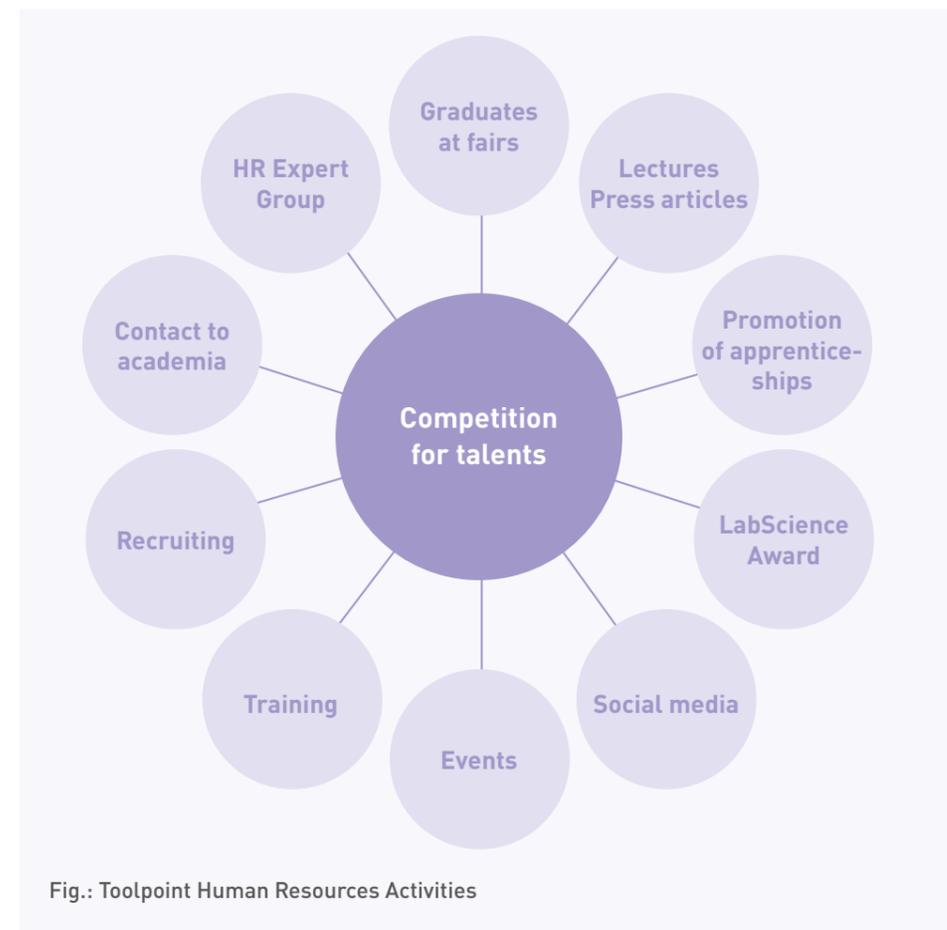
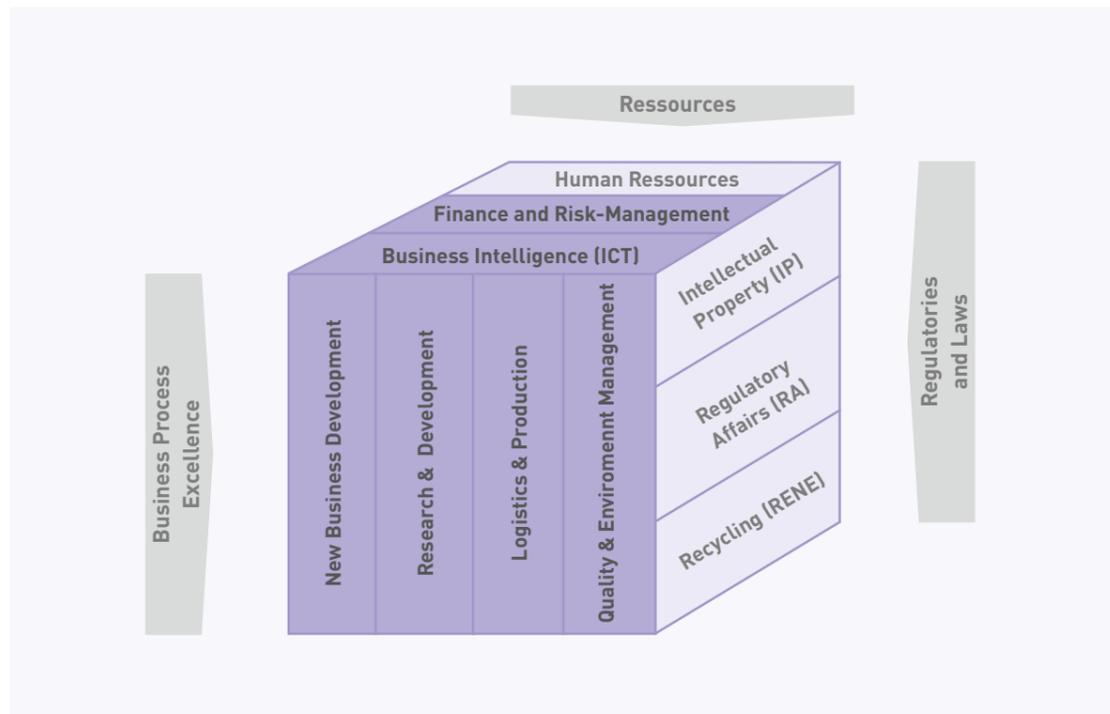


Fig.: Toolpoint Human Resources Activities

2.4 Commercial Cooperation



2.4.1 Intellectual Property Expert Group

The goals of the IP Expert Group are:

- Advancement and integration of IP professional competence through inter-company cooperation
- Establishment of a platform for mutually beneficial information exchange
- Standardisation of contracts using a check list
- Increasing the communication culture to anticipate potential conflicts

The IP Expert Group, attended by a neutral IP attorney, met twice this year and considered the following topics:

- Design of purchasing process for secured IP area
- Obstruction of competitors in the patenting process
- Official registration of products for US patents – practical implementation for OEM devices
- Documentation of long-standing expertise in the patent department
- Working meeting
- Copyright law and inventions

2.4.2 Chemical Waste Disposal Service

Toolpoint offers its members a disposal and recycling service. This service ensures that medical equipment of all sizes can be disposed of professionally and appropriately throughout Europe, in line with the 2002/96/EC directives.

Booking of the services is very simple and is available through our website. The disposal and decontamination forms can be downloaded from www.toolpoint.ch/Recycling. These are completed by the customer and then passed on to our recycling partner, who gets in touch with the customer and clarifies all the details. The equipment is then picked up from the address specified and disposed of appropriately. Toolpoint members benefit from a preferential price.

Qiagen is currently using these services throughout Europe.



2.5. Policy Action

2.5.1 Representation of Interests for the Sector (Regulatory Affairs Expert Group)

The Regulatory Affairs Expert Group held three meetings. Current issues relating to regulations were discussed at the meetings and external speakers organised where necessary.

We reorganised the Expert Group in the second half of the year. The following objectives were developed together with the Expert Group members:

The Regulatory Affairs Expert Group is a networking platform where specialists in regulatory affairs can regularly meet and exchange information. It aims to develop a collective perspective on regulations in laboratory technology through regular discussion and collaboration. This Expert Group offers the following benefits:

- Dialogue among specialists
- Exchange of experience in the implementation of regulations
- Exchange of experience in country-specific aspects
- Exchange and development of expertise among experts in order to implement the regulations more efficiently
- Focus on common guidelines and topics. Joint interpretation of regulations by means of official Toolpoint position statements
- Influence through lobbying if existing regulations need to be changed
- Cost-effective provision of information on possible changes at an early stage
- Collaboration with external experts such as notified bodies and selected companies
- Establishment of the Regulatory Affairs Expert Group within Toolpoint creates an organisational structure that is externally visible

The Regulatory Affairs Expert Group will meet as required when there are important issues to be discussed. In general, this will be in response to new regulations or for discussion of applications in the context of the regulations. The members of the Regulatory Affairs Expert Group can request or hold a meeting at any time.

2.6 Cluster Expansion

2.6.1 Members

A new cost model for Toolpoint was agreed at the AGM on 27 May 2016. This came into effect from 2017. The members are divided into the following groups:

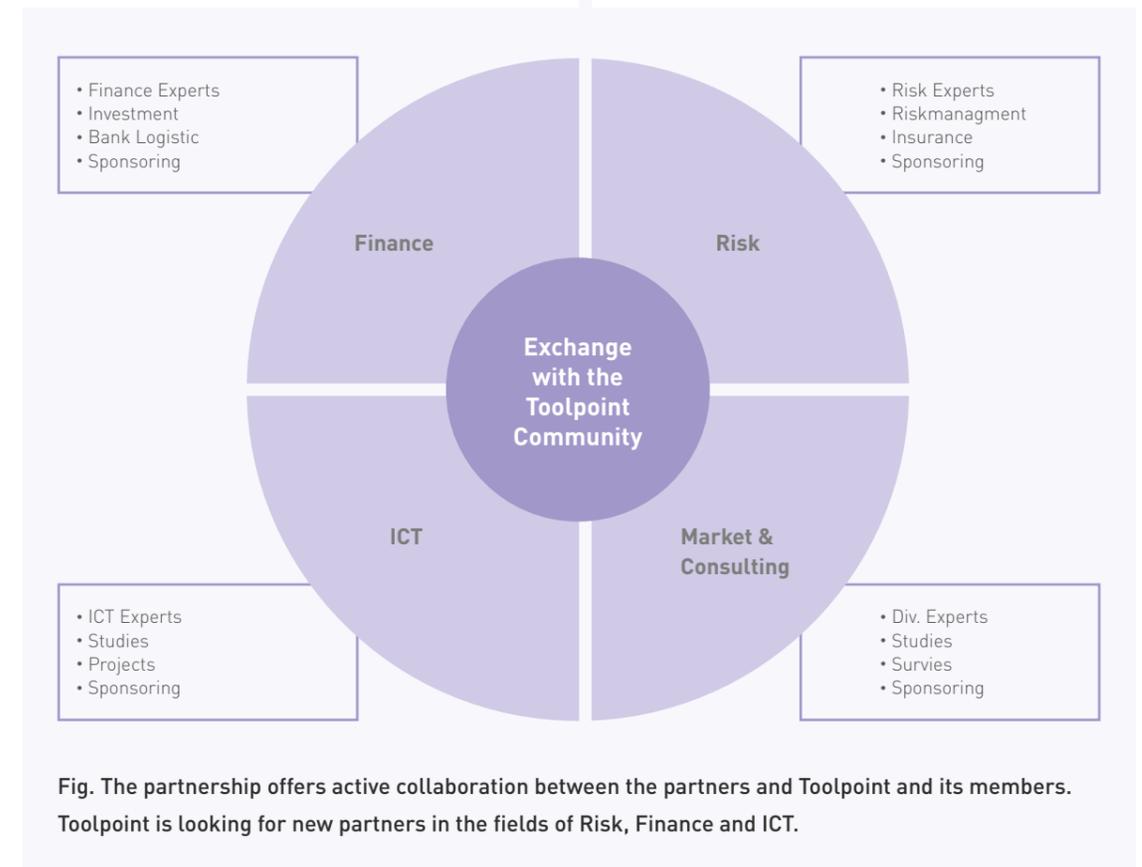
- Premium Member
- Basic Member
- Start-Up Member
- SE (small enterprise) members with up to 25 employees and < 5 million in annual revenue
- Key Opinion Leader
- Start-up Member
- Partner

From 2017 onwards, the members pay their annual fee and – depending on membership status and activities by Toolpoint – receive a separate invoice for services provided. The new cost model offers more flexibility for members, who can now decide for themselves when and in which events they wish to participate. Premium Members benefit from an all-inclusive fee. All services are included for a fixed price.

The acquisition of new members has also begun. To support this initiative, we welcome Mr Ruedi Ryffel, who has been responsible for Member Relationships from 1 October 2016 and is actively acquiring new members.

2.6.2 Partners

Toolpoint is committed to identifying suitable partners in the area of risk management, finance, ICT and market & consulting.



3

Organization

Toolpoint's structures remain very lean and the organisation continues to be run along entrepreneurial lines. The most important decision-making body is the Annual General Meeting. The Board of Directors provides the basis for decision making.

The current members of the board of directors are

Dr Michael Collasius (President), Pius Fink (Member of the Board), Ulrich Kanter (Member of the Board)

Advisors

Danielle Spichiger, Cantonal Office for Economic Development and Labour, Professor Peter Ryser, EPFL, Dr Philippe Steiert, CSEM

Accounting

Unitreva AG

Auditors

Treucontrol AG

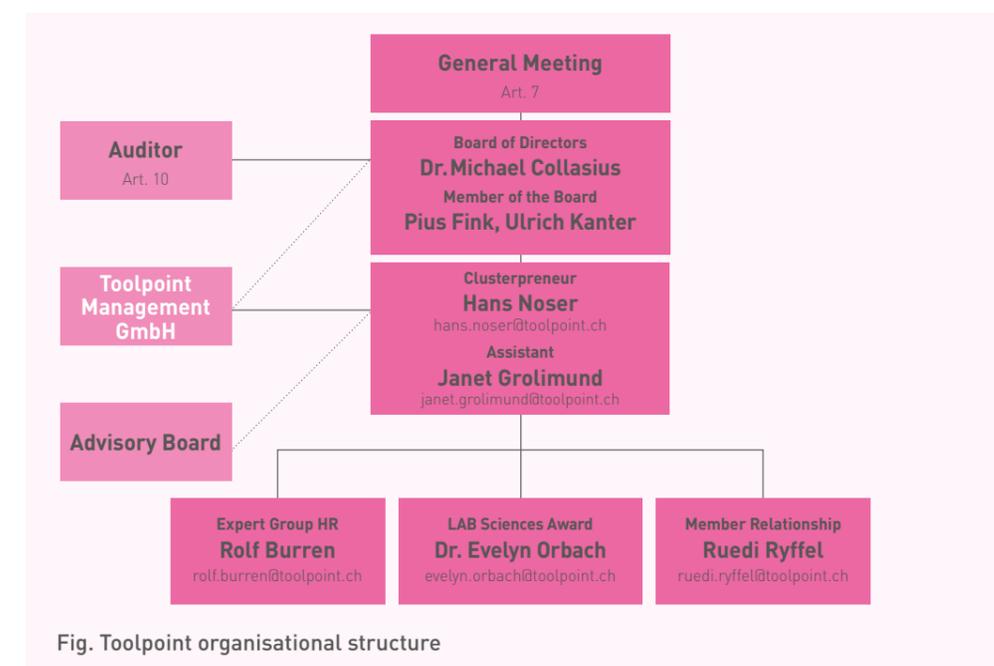


Fig. Toolpoint organisational structure

All delegates met once this year for the Annual General Meeting.

The Delegates' Conference defines programmes for the projects and for Expert Groups. It also serves as a platform for the exchange of information and setting out the general course of direction.

Due to high VAT requirements, Toolpoint Management GmbH was founded in 2010. This foundation enabled the risk of additional payments to be minimised.

Experience in taxation practices relating to value added tax has shown that, at the present time, Toolpoint does not need to be structured as a limited liability company. For this reason, Toolpoint Management GmbH was liquidated at the end of 2016. In the future all services will be provided exclusively via the association.



Financial Report

» Audit Report 2016: Toolpoint Management GmbH

» Audit Report 2016: Toolpoint for Lab Science

The Toolpoint for Lab Science Association liquidated Toolpoint Management GmbH effective as of the end of 2016. Toolpoint Management GmbH was founded in 2010 based on the advice of our former trustees, in response to the new VAT legislation. We have gained more experience with VAT since then. For this reason, the Board has decided to simplify the structure of Toolpoint and liquidate Toolpoint GmbH. From the start of 2017, the Toolpoint for Lab Science network has only existed as an association. The new VAT number of the Toolpoint for Lab Science Association is CHE-111.642.278.

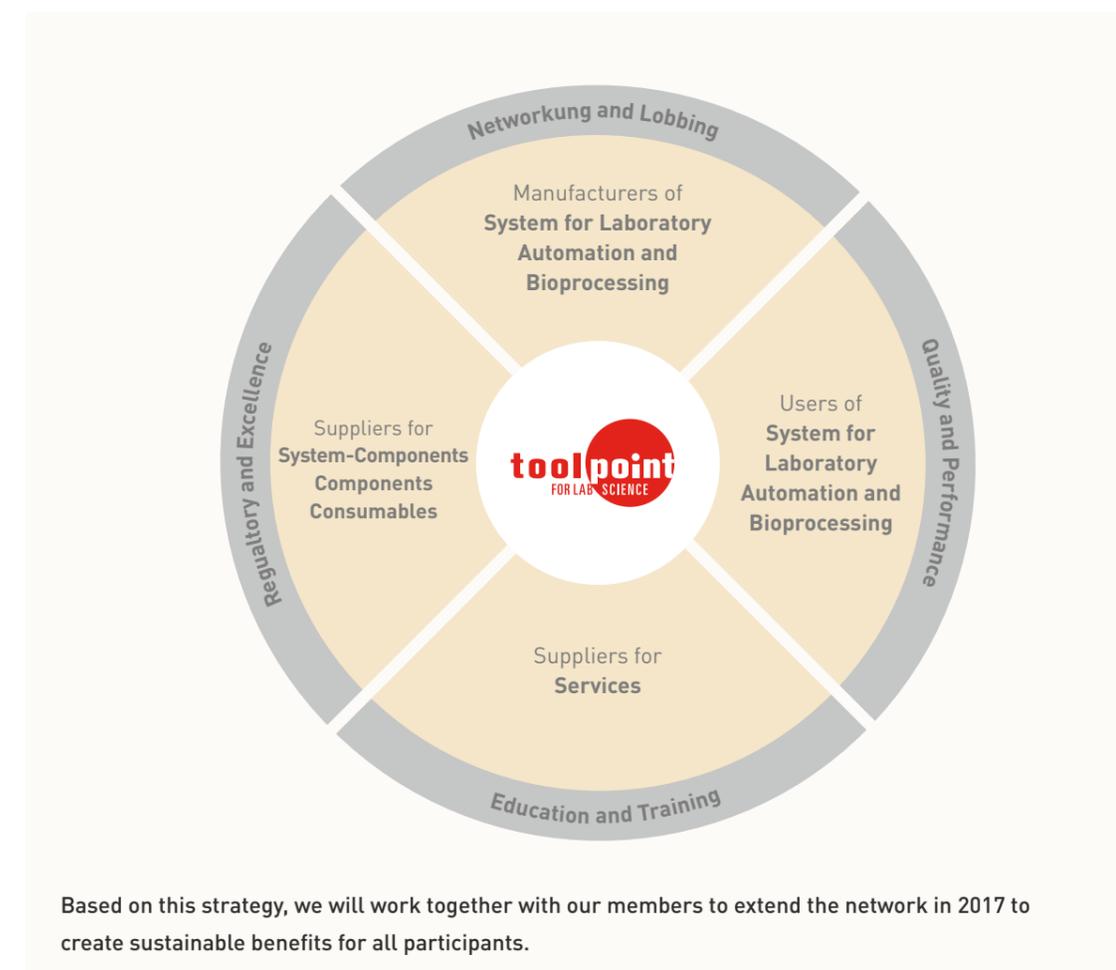
The audit reports of the association and of Toolpoint Management GmbH are attached.



5

Outlook

The Toolpoint network will intensify its collaboration with neighbouring clusters and organisations in 2017. This will enable us to organise useful and interesting events and meet-ups more easily.





Layout and production

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