toolpoint®
FOR LIFE SCIENCE

Annual Report 2008/2009

generating benefits

Annual Report 2008/2009
Contents

1. Toolpoint: A 6-year success story

Toolpoint was founded six years ago by local representatives of industry to promote optimum use of the excellent conditions for the rapidly growing Life Science branch and to expand vertical cooperation. Toolpoint can look back on six years of successful development and organisational activities.

Toolpoint focused right from the beginning on the growing and future-oriented Life Science Instruments industry. Over the years, a number of successful companies had started business in the region around Lake Zürich and together had established a worldwide leading position in the field of Liquid Handling. A globally equally successful customer base in the pharmaceutical field (e.g. Actelion, Novartis, Roche), first class technically oriented universities as well as competent and innovative suppliers provided the ideal basis for intensified cooperation along the value added chain (Fig. 1)

Toolpoint initiated projects geared to real needs, set up project groups, expert groups, and organised special events. The benefit for the members was always put at the very forefront of its efforts. The needs of the members were carefully registered and the services adapted and expanded. Toolpoint has grown with its tasks and activities and is built on a strong foundation of trust.

Toolpoint currently has 27 members, 5 expert groups, about 10 active project groups in different fields, 1 global standardisation initiative, as well as 10 annual occurring information, training and networking events.

Toolpoint works together closely with Swiss Government promotional agencies such as the CTI (KTI) and Whoch6, as well as with SystemsX, the Swiss initiative in Systems Biology. Close contacts also exist with federal and cantonal location promotion agencies and with the communities in the region. This cooperation has resulted in a number of companies setting up business in the region and the creation of about 320 additional jobs in the last three years.

Most Toolpoint member companies operate on a world-wide basis. Together they have a turnover of about 4 billion US dollars and employ some 20,000 people. The companies are very different in size and structure. Besides four companies quoted on the stock exchange, there are many privately owned SMEs (KMUs) and Start-Ups (see Fig. 2)

This annual report accounts for the activities of Toolpoint in the business year 2008/2009 (October to September).

Toolpoint is well prepared for the future and will continue to develop its strengths (see 6. Outlook). Criticism from members is taken very seriously. It triggers discussions and is often the starting point for new ideas. As a result, the actions and resulting benefits become more transparent and measurable for members. The central question remains: What does an individual member expect from Toolpoint? Management has looked into potential improvements in the first half of the year and will implement changes in 2010.

But Toolpoint would not be where we are now without its loyal members and supporters and their dedication in the interests of a globally successful Life Science Instruments industry.

Thank you for your motivation and commitment!

The Toolpoint Management Team

Peter Schleiffer   Rino Kunz   Marc Leuzinger   Esther v. Ziegler
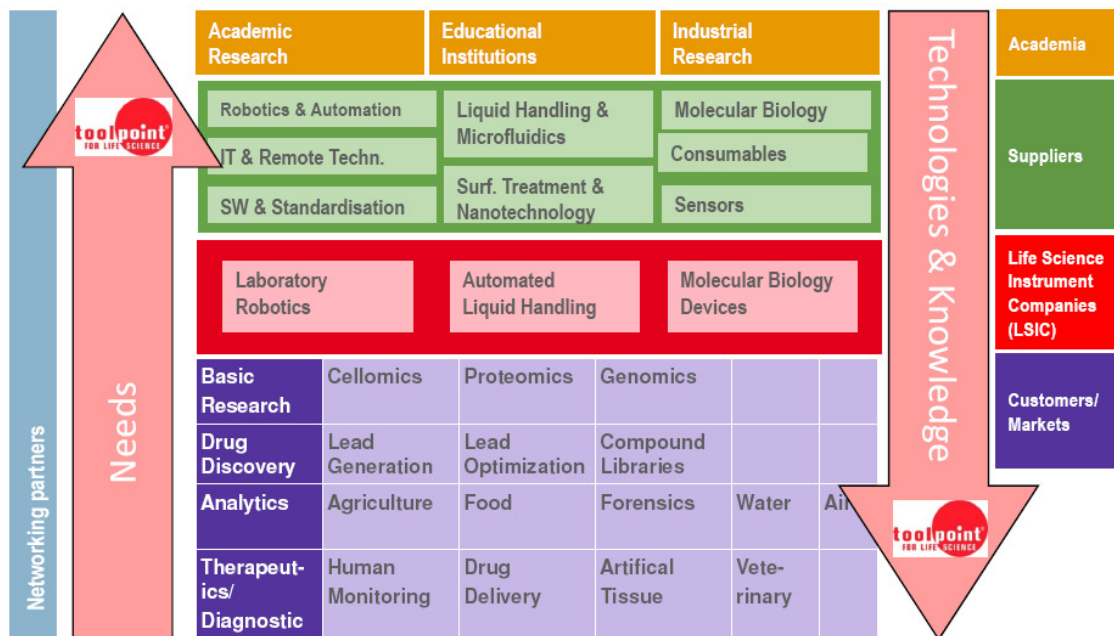
The vertical cluster: value added chain

Fig. 1 The value added chain shows the target markets of Toolpoint (lilac), the technological core competencies of the suppliers (green), the knowledge and technology carriers such as universities (yellow-brown) as well as the core competencies of Toolpoint core members (red). Toolpoint is engaged in know-how and technology transfer focused on the demands of the target markets (indicated by the two arrows).

Members of the Toolpoint Cluster

Life Science Instrument Companies (LSIC)

Stock exchange listed:
Mettler Toledo, Greifensee
Qiagen, Hombrechtikon
Stratec Biomedical Systems,
    Birkenfeld, Neuhausen
Tecan, Männedorf
Private / SMEs (KMUs):
Büchi Labortechnik, Flawil
CTC, Zwingen
Cybio, Jena
Gilson, Paris
Hamilton, Bonaduz
Integra- Biosciences, Chur
Leister Axetris, Kägiswil
Rainin (Mettler Toledo), Pratteln
Seyonic, Neuchâtel
Sias, Hombrechtikon
Xiril, Hombrechtikon
Start-Ups:
SpinX-Technologies, Meyrin

LSIC Suppliers

Private / SMEs (KMUs):
Baumer Group, Frauenfeld
CSEM, Neuchâtel, Alpnach
Infoteam, Stäfa und Bubenreuth (D)
Leister/Axetris, Hergiswil
Sensirion, Stäfa
Surface Contacts, (D)
SuSoS, Volketswil
Xavo, (D) und Basel
Weidmann Plastics, Rapperswil
Start-Ups:
Dynetix, Landquart
Osmotex, Alpnach
Xeronics, Hombrechtikon

Fig. 2 Toolpoint members

2. Highlights of the Year

Successful network, verticalisation and benefit process:

Toolpoint demonstrates the power of its network:

- The SiLA example shows how verticalisation (from customers via the Life Science Instruments companies through to the suppliers and academia) can work to generate benefits. The great interest at the SiLA luncheons, the international expansion and the growing number of new SiLA members, as well as the intense, inter-company cooperation in the project groups are clear evidence.
- The result of the W.I.R.E. / Toolpoint diagnostic study (7 large member companies) exceeded expectations and will lead to increased information exchange in the diagnostic field.

MipTec: Toolpoint and SiLA present! MipTec Steering Committee (see 3.2.2)

MipTec attracted a record number of congress participants (over 3000) and reports "a great success with the topic Growth". Both Toolpoint and SiLA were present this year and aroused a lot of interest. The SiLA Luncheon was even overbooked so that some interested people had to be referred to the SiLA Stand for information.

Partnership with PwC intensified

The partnership with PwC has been intensified. PwC will participate actively in different projects (W.I.R.E., Finances, SiLA, etc.).

Management succession assured

Toolpoint has found the ideal managing director to succeed Peter Schleiffer and welcomes Hans Noser, an experienced entrepreneur.

Site marketing appreciated

The lehrstellenbezirkmeilen.ch – project, which was initiated by Toolpoint, has been able to create 15 new, additional apprenticeship positions. This news was very positively received by the communities involved. Furthermore, over 50 new jobs have been created by Toolpoint member companies in the region during the last year.

New applications

Proactive applications have been received from two Start-Up companies with interesting know how.

3. Information about Application Fields

Toolpoint's activities and services can be divided into six main fields. This corresponds to the structure used in the cluster theory:

• Innovation and Technology
• Networking
• Education/Human Resources
• Commercial Collaboration
• Policy Action
• Cluster Expansion

3.1 Innovation and Technology

Enhanced trust among the members and the active participation of the companies this year has once again enabled Toolpoint to embark on new projects and to complete others successfully. Peter Schleiffer and Dr. Rino Kunz continue to follow the proven "Toolpoint Technology Assessment Process". This is based on 1:1 conversations held at regular intervals (2 per year) to gather information on future individual requirements of the companies and to look for common interests. The results of these conversations as well as the findings of the Roadmap Team (RMT) are then consolidated and presented to the member companies in an anonymous form. Certain effective common denominators emerge from the discussions showing whether there is enough support for corresponding new projects or proposals. The necessary expertise is obtained by including academic institutions or external companies in the projects. Following this, interested member companies can decide whether they wish to participate in a "pre-project" to determine the goals and budget of the project, and finally whether they want to participate in the final project.

It is a declared aim of Toolpoint to integrate customers more directly into future projects.

The process is shown schematically in the diagram below:
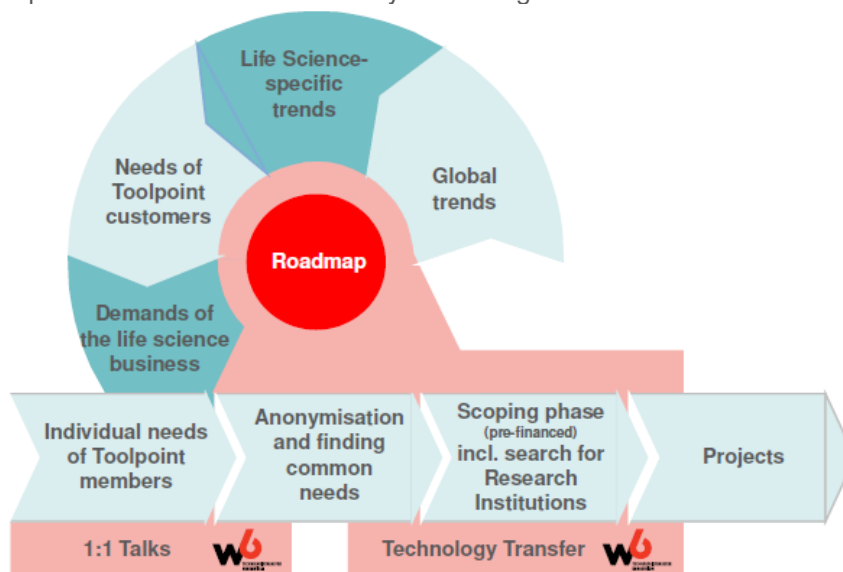
3.1.1 Roadmap Team

The Roadmap Team (RMT) is a kind of "Think Tank" for Toolpoint. On the one hand, it aims at updating the extensive Life Science Roadmap from time to time and on the other hand at discussing topics that can be of a somewhat more general nature or have a timescale that is larger than for the subjects discussed at other expert committee meetings. The RMT thus acts as an "early warning system" to get alerts on market-relevant technological and other developments. The information gathered serves as a basis for making recommendations and taking decisions in the life science field. See also the "Toolpoint Technology Assessment Process" diagram. The following topics are among those that are regularly checked for trends and their relevance for the future:

- Health markets (growth markets, maintaining and improving health, new distribution channels, for example health centres).
- The integral view (human being in a holistic approach, human attention AND ultra-medicine).
- Networking in the LS industrial sector (focussing AND interconnecting, coopetition).
- Systems biology (first concrete applications, future visions as drivers) (See 3.2.5)
- POC (Point of Care: individualisation and personalisation, decentralisation).

In addition, a trend study on "New diagnostics markets – chances for growth and distribution channels in future customer- and patient-oriented diagnostics markets" was initiated and started (see 3.1.2)

➜ Based on our members' request, a Roadmap Check-up is being prepared for 2010.

3.1.2 Technology Projects (Overview)

Regular projects:

Sensitip

Objective:	Online pipetting control with flow measuring system in tip.
Project Leader:	Agathe Koller-Hodac, ILT/HSR, akoller@hsr.ch
Participants:	7 from industry and 2 from academia
Information:	CTI project started in January 2009, to be terminated by February 2010.

ReDefine trends in diagnostics - a study

Objective:	Current information on trends and opportunities in future diagnostic markets: "New diagnostics markets – chances for growth and distribution channels in future customer- and patient-oriented diagnostics markets" (this study was recommended by the Toolpoint Roadmap Team). The final presentation covers the above topics very clearly and concisely, shows the challenges and will arouse the interest of the market participants. Diagnostics will become a driver in health care. But one important question still has to be answered: How can social acceptance be achieved?

The participants of the study will continue to exchange ideas with the project manager in a Diagnostic Expert Group.

Project Leader: Dr. Stefan Siegrist, stephan.sigrist@collegium.ethz.ch

Participants: 8 from industry, 1 from academia and W.I.R.E, the Think Tank ofBank Sarasin, www.healthhorizons.ch

Information: To be terminated in November 2009.

W.I.R.E.
WEB FOR INTERDISCIPLINARY RESEARCH & EXPERTISE

Wirtschaft | Gesellschaft | Lifescience
Think Tank der Bank Sarasin & Cie
und des Collegium Helveticum von ETH und Universität Zürich

Cover & Pierce

Aim: Develop new solutions for covering and piercing for liquid containers of different formats

Project Leader   If you are interested, please contact rino.kunz@toolpoint.ch

Participants: 3 from industry, 1 from academia

Information: On hold

Coopetition Projects:

LAC liquid arrival check

Objective: Online check of liquid arrival at the destination well or container.

Project Leader: Rino Kunz, Toolpoint, rino.kunz@toolpoint.ch

Information: Discussion results (February 2009)
→ *too competitive*
→ *will not be started*

SILA

Objective: To standardise interfaces for the integration of laboratory automation installations and system components focusing on the urgent need of the pharmaceutical and biotech industries.

Project Leader: Dieter Speidel, Xeronics, dieter.speidel@xeronics.com, www.sila.coop

Participants: 25 industrial companies,

Information: For more details, see 4.1.4

Finished projects:

Carry-over

The "Carry-over" KTI-project that Toolpoint initiated in 2007 was finished in February 2009. Some results were published in the March 2009 edition of **BioForum**:
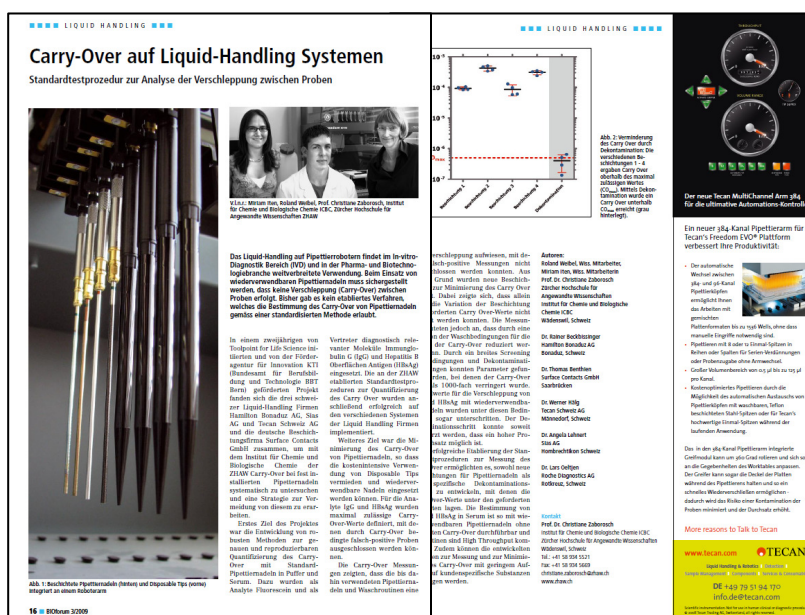

Fig. Article in BioForum March 2009, download via press on the toolpoint website.

A further publication will soon be available:
The **Journal of the Association for Laboratory Automation** (JALA) has accepted the following paper for publication. The title is "Development of Standard Test Procedures for Quantifying Carry-Over from Fixed Pipetting Tips in Liquid Handling Systems".This paper has been submitted by Prof. Dr. Christiane Zaborosch and the Toolpoint Project team.

HiPerTips (high-performance pipetting tips and needles):

Objective: Improving the pipetting performance of needles and tips, Project terminated in July 2009. Further activities are in progress on a bilateral and strictly confidential basis.

Pipetting specifications

Objective: Standardisation and comparability of liquid handling (pipetting) specifications. Results were shown as posters at MipTec 2008, 14-16th October 2009. Information flyers can be ordered from esther.v.ziegler@toolpoint.ch.
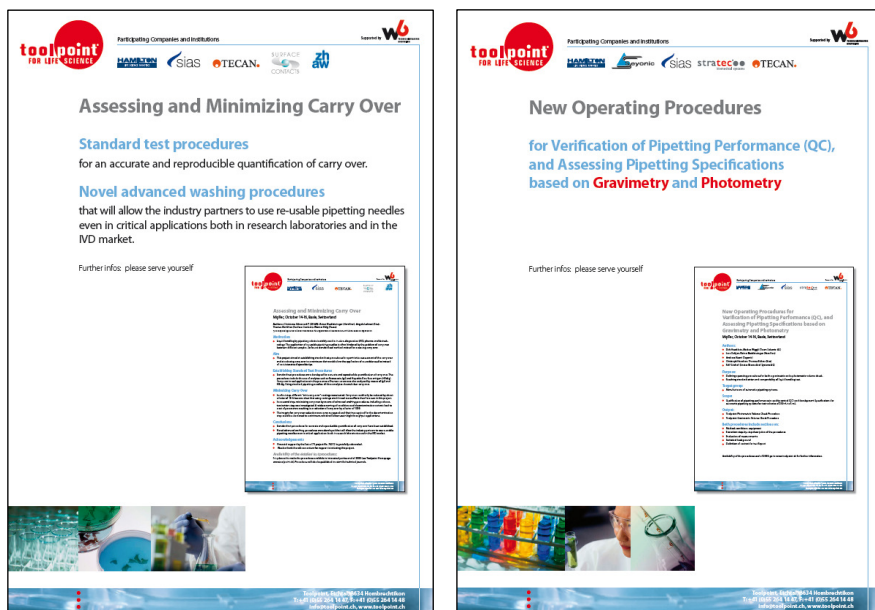
Fig. Posters shown at MipTec.

Possible projects for the future

Various project ideas are currently under consideration to determine the scope of the possible projects (a so-called scoping process). One of them can be mentioned here: The topic "**High-Throughput- and High-Content-Screening"** has aroused great interest among our members and appliers (pharmaceutical). The corresponding contacts to academia have already been made.

3.1.3 Further Activities

IVD Industry Connectivity Consortium (IICC):
Toolpoint has been a "General Interest Member" of IICC since August 2008.

SystemsX.ch
Toolpoint is in regular contact with SystemsX and prepared an SME Workshop for October 19th 2009 at the ETH Zürich together with the SBA and SystemsX.

The topics included presentations of selected activities in research and development and bridging the gap between academia and SMEs/Industry. The main emphasis was on technical aspects according to the priorities set by the Toolpoint Roadmap Team: Microfluidics, cell-based assays and IT aspects.

SystemsX.ch is a research consortium of eight universities and three research institutions. About 80 research groups devoted to Systems Biology collaborate in eight Research, Technology and Development programs. The initiative is open to new partners if they have proven scientific track records in one or more areas of the Systems Biology. SystemsX.ch is funded by a federal budget of CHF 100 Mio for the period of 2008–2011.

Competence Center for Medical Technology

CCMT is an active hub between academic R&D providers and medical technology firms for establishing partnerships with the aim of realising new product innovations.

Active collaboration began on 22 August 2008. In addition to direct collaboration on specific topics on a case-to-case basis, we have organised a common event on "Rapid Prototyping" on 12 February, 2009. Topics for potential future collaboration are for example "RFID-plus" and Point-of-Care (POC) Devices.

3.1.4. Standardisation in Lab Automation: SiLA Initiative

Toolpoint as an independent organisation was invited by Biotech/Pharma companies such as Novartis and Roche to initiate and lead a global "framework for further standardisation for laboratory automation equipment". This invitation together with the positive decision at the CEO Event in May 2008 paved the way for the SiLA Initiative. SiLA defines standards supporting RAPID INTEGRATION of devices/instruments into automated lab environments.

The project team is under the lead of Dieter Speidel (CEO Xeronics). The core team consists of:

- Dr. Erwin Althof, Novartis Pharma
- Dr. Carsten Etzold, Hamilton Bonaduz
- Dr. Remo Hochstrasser, F. Hoffmann-La Roche
- Dr. Andrzej Knafel, Roche Diagnostics
- Detlef Riedel, Xavo
- Peter Schleiffer, Toolpoint
- Dieter Speidel, Toolpoint/Xeronics
- Uli Syré, Infoteam
- Jason Meredith, Tecan

The organisation was set up after the initial kick off at the MipTec luncheon (14 October 2008). In the meantime SiLA has 25 active member companies. Leading system manufacturers, software suppliers, system integrators and pharma/biotech corporations have joined the SiLA consortium and contribute in several different technical work groups with their highly skilled experts.
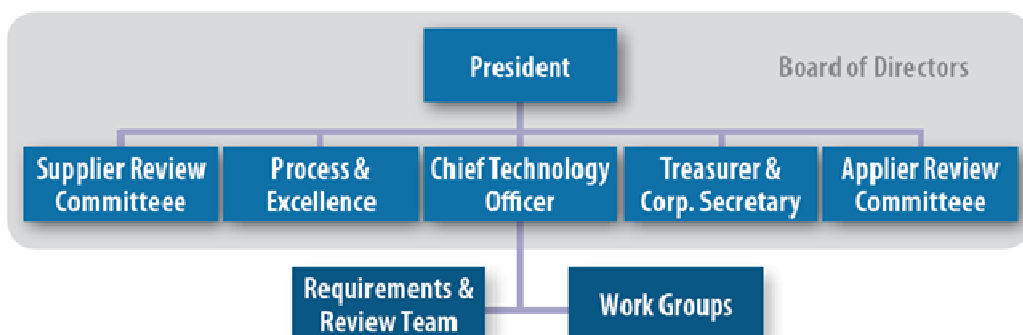
SiLA released the first version of its General Interface Specification in August 2009 and several Device Class Interface Specifications will be finalised this year.

Thanks to the extraordinary contribution of the members of SiLA's work group, all the major goals will be achieved and the SiLA standard will be ready for implementation by end of 2009. Further additional projects such as standardisation of data interfaces and labware specifications are under development.

The SiLA rapid integration trademark and the SiLA certification logos have been registered for international use. Training and certification services will be introduced next year.

For 2010 SiLA plans to establish representation in the USA and to extend their applier member base by admitting additional pharmaceutical corporations. Further goals are to finalise several system integration projects using the SiLA standard and to start the first cooperation projects with system suppliers for integration of SiLA interfaces into their new products.

www.sila.coop provides further information and regularly updated news.
The SiLA Info-Flyer can be downloaded via the SiLA Website or can be ordered in printed version by sending an e-mail to esther.v.ziegler@toolpoint.ch.

SiLA was present at MipTec with a booth and gave a luncheon which was very well attended.

Pictures:
SiLA stand at the Miptec   The well attended SiLA luncheon meeting   Toolpoint stand at the Miptec

SiLA was also presented this year at ALA in Palm Springs, at SBS in Lille and at ELRIG in Liverpool.

3.1.5 Toolpoint Technology Information Platform (T-TIP)

Two T-TIP events were organised during this business year:

⇨**15 April 2009 at CSEM in Landquart with a focus on:**

- Nano-imaging
- Bio-selective surfaces
- Robust medical-sensorics
- Micro-cell reactors

combined with a presentation of our member Dynetix.

⇨ **23 September 2009 at ILT (Institut für Labor Technologie) of HSR (University of Applied Technologies Rapperswil), main topics were:**

The emphasis was on the latest methods for integrated product development, including technologies such as for example sensorics, materials and automation as well as simulation tools (3D-CAD, FEM, Labview, Rapid Prototyping etc.)

3.2. Networking

3.2.1 Scientific Forums

Toolpoint plans several **Scientific Forums** per year. Scientific forums are useful for networking and for information exchange, and furthermore help to bring up specific topics that are of interest to our branch. These include possible future scenarios, technology trends, application examples and customer needs. Typically, 30 to 60 interested listeners come to the community hall in brechtikon and participate actively at these meetings. The presentations can be downloaded from the Toolpoint toolnet or will be sent on request. Ask esther.v.ziegler@toolpoint.ch

19.1.2009: Dr. Thomas Raichle, Head of Program-Management Decentralized Solutions at Roche Professional Diagnostics in Rotkreuz held a presentation with the following key aspects:

- Challenges of the in vitro diagnostic.
- Market trends
- Organisation form
- System solutions
- Centralisation versus decentralisation
- Requirements for decentralised diagnostics now and in the future

24.8.2009: Jürg Zürcher, partner at Ernst & Young, Zürich, explained the tendencies and the market development in biotechnology taking into account the financial crisis. He presented four paradigm-shifting trends that

should lead to new, more sustainable ways of funding drug development:

- A wave of generic drugs
- The expansion of personalised medicine
- The fundamental healthcare reform in the US
- The continued globalisation of the industry

3.2.2 MipTec Steering Committee

Toolpoint was again represented on the **MipTec Steering Committee** by Peter Schleiffer. Besides representatives from Novartis, Roche, Actelion and other companies, Toolpoint was invited as the only representative of the vendors (exhibition). In 2009, an additional 33% of exhibitors registered at MipTec. MipTec is now the biggest Drug Discovery Congress in Europe and as such is an excellent platform for Toolpoint and SiLA.
Toolpoint sponsored again the "Awards for Young Scientists". The prizes were presented by Michael Collasius (President) und Peter Schleiffer.

1st prize € 1500
2nd prize € 500,
5 awards each of € 200

3.2.3 CEO Event

The CEO Event took place with a full house on May 29th of this year on the Novartis Campus in Basel. The advantages of the SiLA standardisation program in the value chain was presented from different angles and found unanimous support. The confidential nature of the meeting was again highly praised.

3.2.4 Life Science Day, ZHAW Wädenswil

Toolpoint attended the Life Science Day at ZHAW Wädenswil. Round table discussions as well as different workshops were organised by ZHAW with the participation of other Universities. The aim was to give a profound insight into life science and its research activities. The event was well attended and the feedback was very positive.

3.2.5 SystemsX Day, Joint Initiative of SBA and Toolpoint

Toolpoint founded the SystemsXDay jointly with SystemsX and the SBA. For further information, see 4.1.3.

3.2.6 Further Networking Activities

This year, Toolpoint was again invited to present its aims and objectives and explain the Cluster Initiative and its success factors at numerous meetings, for example at FHNW. These opportunities are normally taken as far as time allows.

17.-19.11.2008: "**Nanotech Conference"** (Montreux), http://www.nanotech-montreux.com/. This conference was of direct relevance to current Toolpoint topics. Rino Kunz participated and gave a report to the Roadmap Team and the delegates' conference.

12.02.2009: Workshop on Rapid Prototyping (Bern): This workshop was held together with the Competence Center for Medical Technology (CCMT) foundation. The CCMT serves as a KTT (knowledge and technology transfer) networking- and communications platform between academic R&D service providers and the medical technology industry in Switzerland. Toolpoint obtained many valuable inputs.

3.3 Education

3.3.1 Human Resources Expert Group

The HR Expert Group met twice in this year (December and June) and discussed current matters relevant to HR. The main topics are the recruiting activities, internship programs, central management of student applications, marketing aspects and the exchange of experiences between HR specialists. The current topic this year is the "Impact of the financial crisis on each company's management".

In addition, the HR Expert Group organised recruiting activities at three different universities as well as at an event organised by SBA (Swiss Biotech Association) At the SBA event, a further aim was to make contact with professionally experienced potential employees

In this current year and at several different exhibitions, a total of 732 discussions with potential employees have taken place and 470 Toolpoint giveaways have been distributed to students.

ZHW Graduation Day, Winterthur (11.3.2009):

Toolpoint once again (for the sixth time) attended the ZHAW graduation day in Winterthur (Absolvententag der Zürcher Hochschule für angewandte Wissenschaften ZHAW). An updated video presentation about the activities of Toolpoint members was shown and created a very positive effect.

As a further innovation, the addresses of interested students were collected in order to build up a database of potential employees that will allow to address them directly and to provide specific information.

HSR Job Market, Rapperswil (22.4.2009)

Toolpoint took part in this job market event for the 6th time. The team was complemented by 2 engineers from Hamilton and a respirator for technical demonstration.

### ETH Polymesse, Zürich (23.4.2009):

Toolpoint presented its industry partners at the ETH Zürich Polymesse (the largest recruiting fair in Switzerland) for the sixth time. The interest by the students seemed to be higher, probably due to the current economic situation.

First job fair of the Swiss Biotech Association, Schlieren (14.-15.5.2009):

This year (for the first time), a Swiss Biotech Association (SBA) job fair took place in Schlieren. Toolpoint participated in this recruiting event with its exhibition stand. Biology students from all over Switzerland attended to hear different papers presented on specific Biotech topics. Between the presentations and during the breaks, the students showed great interest in possible jobs with Toolpoint companies.

In contrast to recruiting fairs, older and in some cases much more experienced people who were interested in new challenges enquired about the possibilities of employment at Toolpoint companies.
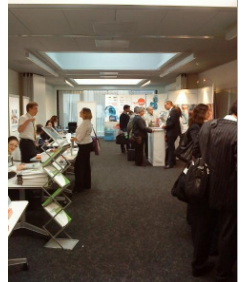
Interest in Toolpoint was very great. The flyer with all the home pages of the companies participating in the HR Expert Group as well as the advertising giveaway (available this year, a marker pen with the Toolpoint logo) were in great demand.

3.3.2 Apprenticeship Promotion in the District of Meilen

The "Apprentice promotion program in the district of Meilen", which is supported by nine communities (Erlenbach, Herrliberg, Hombrechtikon, Küsnacht, Männedorf, Meilen, Stäfa, Uetikon am See, Zumikon, in alphabetical order), has enjoyed another successful year.

At the annual plenary meeting with the community representatives, Toolpoint's Brigitte Böhi was able to present the fruits of her 400 direct company contacts: An additional 15 apprenticeships were initiated. Brigitte Böhi's job has many different aspects. She has to acquire new apprenticeships, support both the companies and the apprentices, and at the same time do an active public relations job.

The topic apprenticeship promotion also appeared frequently in the local press, an important factor in creating awareness in the population and potential apprenticeship companies. In addition, the apprenticeship promotion program was presented at trade shows and exhibitions. Toolpoint maintains a separate Website for the apprenticeship promotion program (www.lehrstellenbezirkmeilen.ch) and supports Brigitte Böhi with management services and in matters concerning communication.

Fig. Articles about the "Apprenticeship promotion program" are available at www.lehrstellenbezirkmeilen.ch

3.4 Commercial Collaboration

3.4.1 Intellectual Property Expert Group

The goals of the IP Expert Group are:

• Acquiring and improving knowledge through focused cross-company competences
• Information exchange platform, inputs of common benefit
• Check list / standard contracts
• Communication culture, anticipation of conflicts

The IP Expert Group meets three to four times a year and is accompanied by a neutral IP Attorney.

In the meantime, Toolpoint has registered several brands:

registered in CH, D, I, UK, Russia, China, USA

SiLA Rapid Integration™   registered in CH, D, I, UK, Russia, China, USA

with separate registration of three different integration levels:

3.4.2 WEEE/RoHS Expert Group

The members of the WEEE / RoHS Expert Group follow the development of the requirement for fulfilment of the original guidelines as well as the new directives (China- RoHS, Indian RoHS, etc) very closely. They discuss and compare the interpretation of these guidelines in the companies and the implementation of the necessary measures. This is designed to ensure that companies approach compliance in a concerted manner and do not engage in expensive and possibly unnecessary individual actions or possibly even overreact.

For the benefit of the members of the WEEE & RoHS Expert Group a disposal solution compliant with the requirements was implemented that can be used throughout Europe by national companies and their customers. The desired disposal is initialised via a portal integrated in the Toolpoint home page; the disposal process is thereby started and carried out. The associated costs can be shared by the members, so that a very cost-effective solution is realised.

3.4.3 Finance Expert Group

The partnership concluded in 2008 with PwC will be continued and intensified.

PRICEWATERHOUSECOOPERS ⓇⓍ

Toolpoint makes available its networking platforms and PwC brings in a cash fee for the exclusive partnership as well as services in kind – especially knowledge in global life science - on different levels:

- CEO meeting
- Scientific Forum
- Roadmap Team
- SiLA

The "Finance Expert Group" had its kick-off meeting at PwC on Feb 5th 2009. It became clear that the needs of the Toolpoint members were too heterogeneous. This Expert Group will therefore not be set up as originally planned. Another project has been derived from it:

PwC and Toolpoint jointly developed a sample handling report that includes 20 global suppliers of "automated liquid handling workstations".

PwC also consults about specific projects (e.g. SiLA) and advises on business and finance models for the long term.

3.5. Policy Action

3.5.1 Representation of Interests for the Branch (Regulatory Affairs Expert Group)

The RA Expert Group has met at regular intervals to discuss current regulatory problems.   Important topics that led to decisions being taken or to recommendations being made were the applicability of new guidelines for machines, new changes concerning GAMP5, implementation of the packaging guidelines, safety and labelling and UL requirements, applicability of IEC 62304 regarding software for medical instruments, changes to the RoHS guideline and handling the German accident prevention regulation for electrical systems and equipment.

Besides a structured overview table with the standards and guidelines applicable for the member companies, the Expert Group has available a list with names of experts and representatives in international committees who can be contacted by members of the Expert Group to help clarify specific questions.

Discussion for a cooperation program with Regulanet (www.regulanet.com) have started.

3.6 Cluster Expansion

The general assembly gave the go-ahead for admission of the following new members. Some have already been involved in different Toolpoint projects and all contribute to increasing the competence of Toolpoint:

Cybio, Jena: a typical liquid handler returns after a 1-year break
Baumer, Frauenfeld:. as a supplier, Baumer is focused on sensor solutions.
Rainin Pratteln: a liquid handler, specialised in pipetting solutions.
Eppendorf, Hamburg: Eppendorf is a classical liquid handler. After the general assembly, the Eppendorf management reviewed its decision and decided – for the time being – not to participate in the Toolpoint network because the necessary management resources are not available.
Dynetix, Landquart: a start up company and supplier, producing active label-free biosensors

There is one withdrawal, namely the **Arendi** company. There were not enough common points and no common projects materialised. Arendi therefore decided to leave Toolpoint.


Fig. The current Toolpoint map

4. Organisation

The Toolpoint organisation is still very lean and is entrepreneurally managed. The most important decision-making body is the delegates' conference. The Board of Directors prepare the basis for making decisions. Members of this board are:

Dr. Michael Collasius, President (previous, elected until 2009)
Matthew Robin, Vice President (previous, elected until 2010)
Giovanni Pisano, Treasurer (previous, elected until 2009)
Peter Schleiffer, Secretary (previous, elected until 2009)
Dieter Speidel (previous, elected until 2009)
Nic Alexakis (previous, elected until 2009)
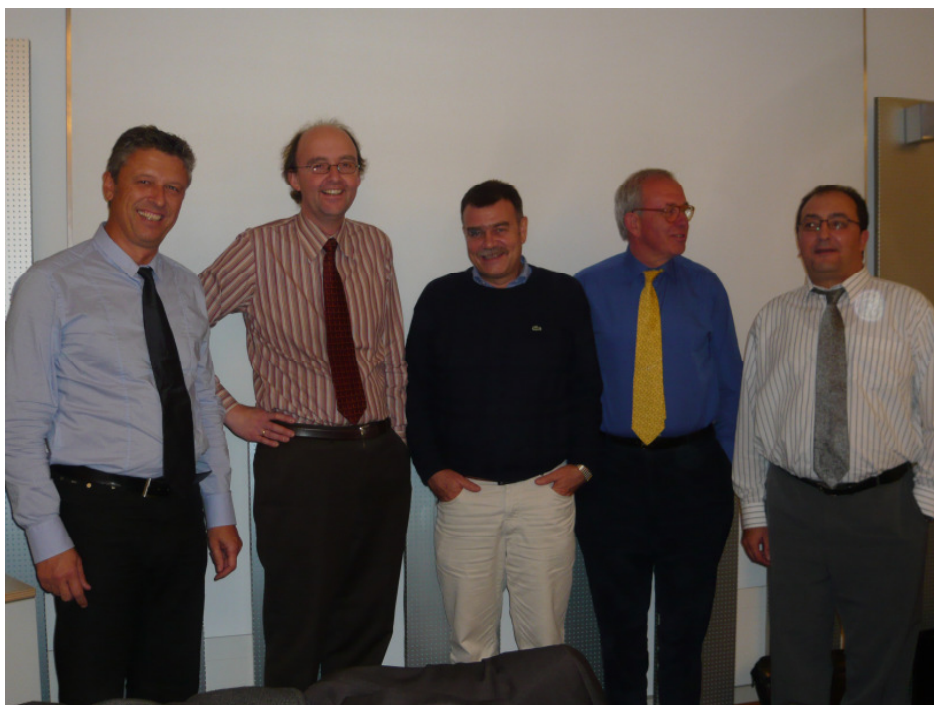
Picture: Toolpoint's Board members with designated new managing director Hans Noser in the center. From left to right: Dieter Speidel, Michael Collasius, Hans Noser, Peter Schleiffer and Giovanni Pisano. Not on the picture: Matthew Robin and Nic Alexakis.

Advisors: Dr. Rolf. W. Arndt (previous, elected until 2009)
              Adrian Stettler (previous, elected until 2009)
              Prof. Peter Ryser (new, elected until 2011)
              Dr. Philippe Steiert (new, elected until 2011)

Auditors: Hansjörg Länzlinger, Tax assessment office, Hombrechtikon (elected until 2009)
              Rolf Naef, Zeiss Schweiz, Feldbach (elected until 2009)

The Toolpoint organisation:

> 25 Senior Executives
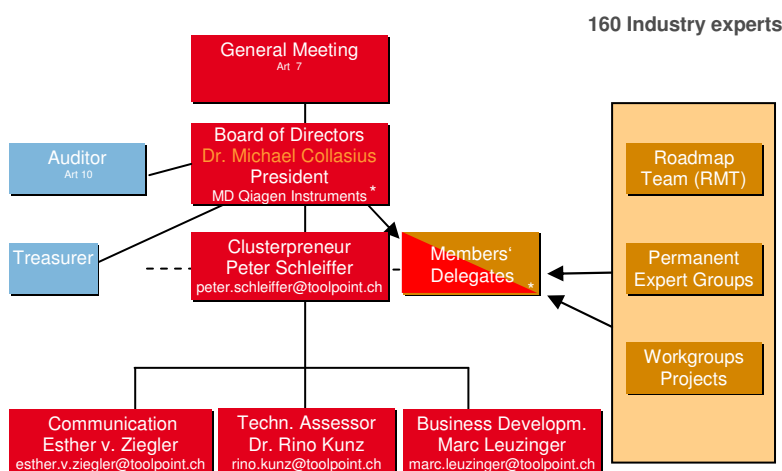
The delegates met twice this year for a delegates' conference, whereby the delegates' conference in November 2008 was held in combination with the Annual General Meeting. At the delegates' conference, the program for the different projects and Expert Groups is defined, and information that is important for Toolpoint's work is interactively gained.

5. Financial Report

With the start of the SiLA project, Toolpoint has increased its budget significantly. SiLA itself is a profit centre within Toolpoint. Separate accounts are also kept for the apprentice promotion project. These are summarized in the profit and loss statement as "Contributions apprenticeship promotion" and "Expenditures apprenticeship promotion".

Toolpoint was able to show a small profit thanks to the exceptional "Loss compensation" contribution of 25,264.00 which was credited to the assets. The loss is therefore fully compensated. Basically however, Toolpoint is a non-profit organisation.

The Toolpoint profit and loss statement:

Revenues	Total 2008	SiLA 2009	Toolpoint 2009	Total 2009
Membership contributions	204,258.00	262,656.41	209,208.00	471,864.00
Membership contributions (optional)	203,489.00		140,493.55	140,493.55
Contributions apprenticeship promotion	67,500.00		57,400.00	57,400.00
Contributions of communities for location marketing	24,000.00		24,000.00	24,000.00
Contributions Whoch6	95,000.00		81,000.00	81,000.00
Revenue external studies			86,454.50	86,454.50
Loss compensation			25,264.00	25,264.00
Other income	20,539.00		32,950.00	32,950.00
Total Revenues	**614,786.00**	**262,656.41**	**656,770.05**	**919,426.46**
Expenditures				
Cluster management	63,231.00		65,000.00	65,000.00

Project management	247,313.00	231,024.87	239,532.55	470,557.02
Communication & administration	58,575.00	11,029.00	81,579.95	92,608.95
Apprenticeship promotion	56,890.00		52,338.15	52,338.15
Optional third party costs (projects)	110,641.00		66,898.50	66,898.50
Expenses for external studies			83,633.25	83,633.25
Diverse expenses (administration, travelling, representation etc.)	62,090.00	17,356.75	27,733.55	45,090.30
Extraordinary costs / depreciation	9,344.00		9,079.10	9,079.10
Total Expenditures	**608,084.00**	**259,410.62**	**625,795.05**	**885,205.67**
Result	**6,702.00**	**3,245.79**	**30,975.00**	**34,220.79**

The Toolpoint balance sheet: Balance per 30.9.2009

Current assets	98,2	Depth	89,2
Fixed assets		Net assets	8,9
Assets	**98,2**	**Liabilities**	**98,2**

6. Outlook 2010

On the basis of a profound analysis of our actual position, we have developed a Toolpoint strategy with a focus on strengthening our effectiveness:

Toolpoint's achievements

- During the last 6 years, Toolpoint has established a remarkable basis, fulfilling most of the conditions of an optimal vertical cluster.
- The unique Toolpoint approach with its 1:1 conversations at management level are the essence of all its activities - based on trust!
- Toolpoint has proofed its ability and skill in initiating projects and bringing together competent partners, i.e. toolpoint members as well as other partners in the vertical value chain (even at an international level).
- The initiative is sustained and financed mainly by its members.
- Crucial to success are the members who support the Cluster initiative fully and with openness and commitment.
- And not least, the staffing of its organisation.
- Many thanks to all of you!
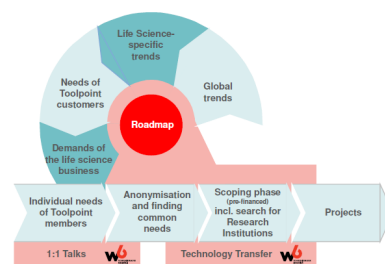
Changes of Toolpoint members and their industry

- The liquid handling business has become more mature, resulting in the need for an extended strategic focus, increasing internationalisation and standardisation.

- It also implies consolidation and pressure within the industry for higher efficiency, leaving little room for long term views.
- Core members become more competitive and avoid technology exchanges and the development of common projects.
- The tough competitive situation demands a unique technology position.
- In summary, this leads to increasing interest in Toolpoint but at the same time a greater range of expectations from Toolpoint within and between member companies.
- At the same time, new markets are emerging, not only regionally but also in terms of new segments, e.g. health care, life style, decentralised applications with implications that are not yet clear.
- These trends depend heavily on corresponding new technologies including their validation and approval processes.

Strategic key questions

1. What are Toolpoint's answers to the broader and more international business focus of its core members?

2. How will Toopoint bridge the increasing span of needs within larger core members that are competing with one another, and between them and typically smaller supplier members and associates?

3. What will the future generation Toolpoint organisation look like? How will it cope with the growing number of members and changing needs and at the same time still maintain the core process with periodic 1:1 conversations?

Strengthen the Toolpoint Strategy

Some strategic initiatives contain the answers to the key questions above. They incorporate a longer term view. In 2010 we will realise some of these strategic initiatives step by step in a concerted effort.
However, for all activities the Toolpoint success factors will be the consistent base:

1. Focusing on the strength of the life science instrument branch.
2. Generating benefits for its members is the ultimate objective of Toolpoint.
3. Integration of interests of all participants in the market (Toolpoint members, appliers, suppliers, and academia) through vertical integration of the entire value added chain.
4. Sustainable growth by adding new competences and maintaining the current working environment.)
5. Toolpoint is mainly financed by its industry members.

Parallel to this, I will introduce my successor as managing director: Hans Noser is aged 53 and is an experienced entrepreneur. He will take over my duties in May 2010. I offer my support and experience – if the General Assembly so wishes - as a member of the board and president of SiLA for a certain period of time.

Communication continues to be important, both internal and external.
Toolnet can be accessed via the Toolpoint website and provides comprehensive information. Many things run discretely and informally at networking events or between individual companies. This is still our aim: Toolpoint wants to make an efficient network available to the whole Life Science Instruments Branch including its suppliers and customers as well as technology carriers such as universities and transfer organisations (Whoch6).

Partnership with the public (District of Meilen, Canton Zürich and the Federal Office for Professional Education and Technology, OPET / BBT) is also maintained. Thanks to the excellent cooperation, attractive jobs should also in future be brought to our region, apprenticeships created within and outside our cluster and last but not least successful technology transfer be realised.

The Toolpoint team (Esther von Ziegler, Rino Kunz, Marc Leuzinger and my successor Hans Noser) looks forward to many interesting projects that bring partnerships and challenges to the advantage and well-being of our members.

Peter Schleiffer

Picture: Toolpoint's President Michael Collasius with the actual Managing Director Peter Schleiffer (left) and the designated new Managing Director Hans Noser (center)