

Spring/Summer 2026

# ONE NUCLEUS HIGHLIGHTS

With a Review of **Genesis**  
2025

Highlights from our support for institutions, companies, and individuals in the life sciences sector via local, UK-wide and international connectivity.





Babraham  
Research  
Campus

from idea

to impact

Babraham Research Campus is a living platform for the life science entrepreneur's journey – creating the space, support and sustainable environment needed to turn pioneering ideas into thriving, world-changing businesses.

It's a community of over 60 companies, 2,000 employees and 300 academic researchers. From start-ups to scale-ups, it's the best place for bioscience entrepreneurs to discover, innovate, grow and thrive.

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Discover, innovate, grow & thrive @Babraham

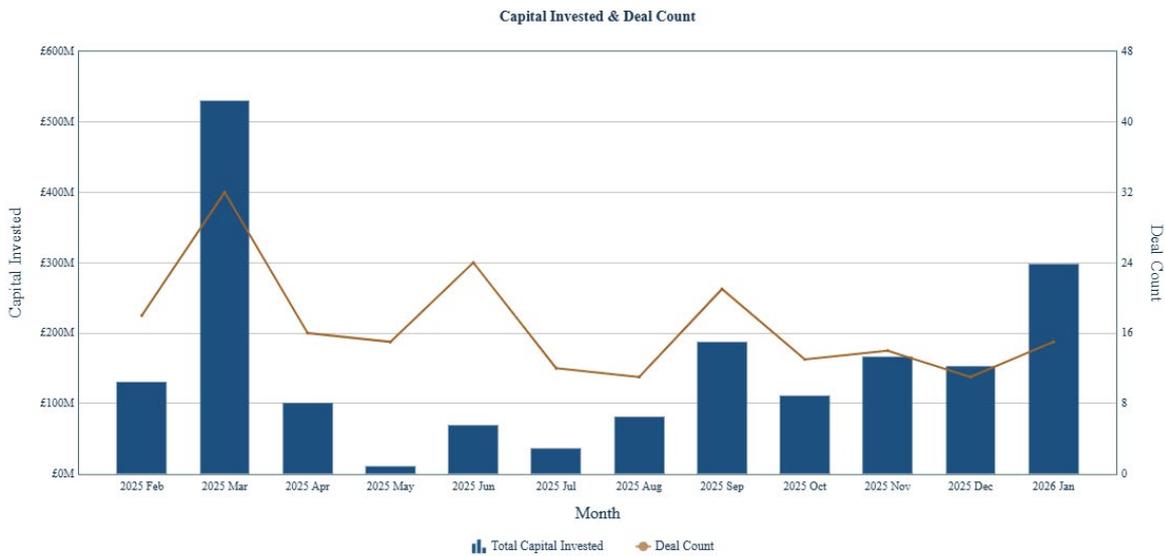
# Welcome to One Nucleus Highlights Spring/Summer 2026!

I am delighted to welcome you to our latest publication. This is our chance to report on some of One Nucleus's delivered activities, with a particular spotlight on some key achievements by our team, our members and the local ecosystem. The publication also provides an opportunity to share with our network some planned activities and investments that One Nucleus is making to add depth and precision to our support of our members going forward. We welcome your feedback on any of these, of course.

To set the scene for the following pages where you can learn more about us and perhaps get a sense of the ecosystem in which we operate, I share some industry data and remarks illustrating the current deal and investment trends and how One Nucleus feels this may impact our members.

## Dealmaking:

Whilst our members are widespread both geographically and phenotypically, we are fortunate to have our roots in two of the most successful life science clusters to date, Cambridge and London. Whilst 2025 remained a challenging year, like many geographies, the last quarter showed signs of recovery, with the sense of optimism being carried forward into 2026, so watch this space for more deal announcements. Some standout deals, demonstrating the diversity in technology and the stage of development made in the region in recent months, are listed below.



Created on 06-Mar-2026 | Source: PitchBook Data



Company	£Raised	Date
Tenpoint Therapeutics	174.23M	January 2026
Outsee	2.5M	January 2026
Bit Bio	37.23M	January 2026
Beacon Therapeutics	56.35M	December 2025
Engitix	59.58M	December 2025
Relation	27.42M	December 2025
Biocentis	9.65M	November 2025
T-Therapeutics	67.81M	October 2025
BoobyBiome	2.5M	September 2025
Enhanced Genomics	14.07M	September 2025

## A Time for Optimism

There has been a significant shift in momentum and trends over the past twelve months. In addition to the venture investment rounds detailed above, major industry players such as AstraZeneca have announced key strategic decisions that are likely to impact many One Nucleus members and stakeholders. As well as announcing a planned investment of \$50Bn in the US (July 2025), AstraZeneca has more recently announced a commitment of \$15Bn to be invested in China over the coming year and a \$1Bn+ collaboration with CSPC in the obesity field. AstraZeneca are not on their own, however. Major collaboration deals have also been announced by the likes of Merck (MSD) and Boehringer over recent months. This is a key trend as China increases its share of the global BioPharma market. What this means for investment into UK-based R&D remains to truly be seen, but perhaps there are lessons that can and are being learned in real time.

Commonly cited as a driver of the China deal flow trend is the combination of lower costs of innovative R&D and speed to key proof-of-concept data. The trend and rapid rise of China is leading some to question whether this will challenge the US crown as the leading market and life science innovation geography. Time will tell, but perhaps the challenge to the US position will trigger an opportunity for UK life science companies with our longest and most trusted biopharma trading partner in this field. How will the US respond?

It seems very unlikely the US can outdo China on cost, but can it adapt to be more streamlined in terms of regulatory reform, clinical trial speed and funding of innovation to be able to compete, then perhaps yes. As for the UK, reform of clinical trials is underway, and the UK science and innovation excellence remains respected globally. Leveraging decades of collaboration, trusted relationship building and mutual respect, the UK-US axis remains very strong. The ongoing UK ability to deliver frugal innovation to complement US partners and investors could, in effect, provide one of the tools the US needs to be competitive with its Asian challengers.

Of course, dealing with both major players is not mutually exclusive, and it seems inevitable that deals between UK innovators and Chinese partners will only increase. It provides more options for our members and can capitalise on the relationships and experience many have been building over a long time in how to engage with and navigate this emerged market.

The UK presence at JPM Week, the interest they report generating and the general growing sense of confidence that investment is back to stay suggest the UK sector could be on course for a fitting but potentially reformed resurgence. Strengths in areas such as precision medicine and the use of AI in R&D can position the UK well in an era where rare disease approvals dominated the FDA playbook in 2025; capital efficiency, and hence frugal innovation is attractive; and political will is changing the UK capital market flexibility to increase equity investment. These factors could all contribute to the UK remaining in the leading group of life science industry locations.

## Investing in Member Support

The ongoing challenges and trends within the sector provided One Nucleus with the impetus and support to invest in additional avenues this past year to support member companies, their employees and the ecosystem as a whole. The investments have included:

- Subscription to both PitchBook and Biotechgate to enable our members to access leading commercial intelligence datasets to target their investment and business development outreach.
- Subsidising emerging company pitching and participation at Genesis 2025
- Continuing our partnerships with EBD Group and Life Science Nation to gain access and profile for our members at BioEurope and RESI conferences, respectively.
- Launching the Going for Gold initiative
- Increasing our business development team to offer greater support to members, particularly in London.
- Co-sponsoring the BioCentury Grand Rounds Europe conference as part of the Regional Host Committee of stakeholders

As you read through the pages of this publication, you will see how One Nucleus is always conscious that it is fortunate to be the custodian of an immensely impressive network of companies, thought leaders and individuals. Very much the goal of One Nucleus is to nurture a trusted environment for business relationship building, knowledge sharing and ultimately to supercharge deal flow between our members and the wider life science sector.

You will find later in the publication more details on how we are deploying access to these additional resources, tailoring support to individual member needs, and evolving the membership fee structure to reward those that contribute and seek to build strong bridges to opportunities for our members.

At this point, I shall reiterate the welcome to this snapshot and insight of our One Nucleus family and hope to see you join us soon.



Tony Jones, CEO, One Nucleus



# About One Nucleus

## Supercharging One Nucleus Members

The goals and roles of any non-profit membership organisation are required to adapt and evolve as the external environment impacts the critical needs of its members and the support they require. In an era of data-driven decision-making, increasingly complex regulatory pathways, globalisation of innovation and a competitive innovation investment landscape, the One Nucleus focus has remained sharply on enabling our members to be informed, connected and visible. To be an effective enabler of member success, One Nucleus prioritises three key areas of member support:

### Connectivity & Insight

One of the key benefits of joining One Nucleus is to increase your competitiveness in the market. Members achieve this through opportunities including:

- Accessing key industry data and contacts, including via the Going for Gold initiative
- Attending One Nucleus events for peer-to-peer connectivity to uncover advice and intelligence from those travelling a similar journey
- Attending One Nucleus insight roundtables and webinars to stay abreast of the latest best practice.



## Accessing Deal Flow Opportunity



Enabling members to be competitive ultimately needs to be put to the test at investor and partnering events where those seeking to access their valuable expertise and proprietary technology through equity investment, R&D collaborations or outsourcing are present. One Nucleus seeks to enable such access through activities including:

- Pitching sessions at One Nucleus conferences (ON Helix and Genesis) and BioWednesdays
- Collaboration with global investment conference provider Life Science Nation via discounts and profiling opportunities at the RESI (Redefining Every Stage of Investment) conference series
- Collaboration with global bio-partnering conference organiser EBD Group for discounts and profiling opportunities at events including BIO Europe/BIO Europe Spring, Biotech Showcase and ChinaBIO
- 1-2-1 introductions and discounts at numerous other conferences such as BioTrinity, NLSDays and more.

## Member Resources

Membership of One Nucleus opens up a range of benefits and resources member companies can use for free or at a heavily discounted rate. These services are all designed to support members in being the best-performing and hence most attractive to investors, partners, clients and employees, business they can be. Such resources include the following:

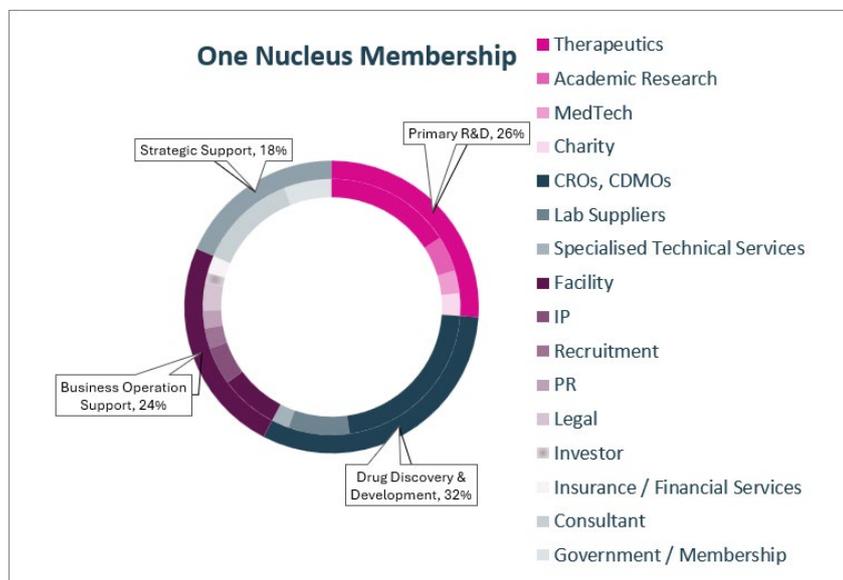


- **Savings** – cash is a vital resource, so using it wisely reflects well on any organisation. Through the Purchasing Scheme and Marketplace, members can access significant discounts on, eg, lab supplies, services and third-party events.
- **Learning & Development** – One Nucleus offers a portfolio of training courses ranging from technical compliance courses required for health and safety compliance to non-technical skills courses, including presentation skills and project management. One Nucleus also hosts a Training Sat Nav on the website to enable members to identify training

courses offered by other providers.

- **Profile Raising** – ensuring visibility in the eyes of your market is key, and One Nucleus provides this for members through the free resource of posting news, jobs, events and blogs to the website, and inclusion in publications such as this ON Highlights publication and eNews.
- **Facilities Management** – whether identifying the best location, negotiating your lease, designing and fitting out your laboratory/office, running the facility or downsizing and dealing with dilapidation requirements, One Nucleus, supported by a team of external contractors, can advise companies on every aspect.

## Diversity is the Driver of Innovation



Much is made of the belief that diversity of input and the interface of disciplines are where innovation happens. This Medici effect is often a result of like-minded experts addressing the same problem from different fields or experiences.

Thinking beyond this simply in terms of technological innovation, the same principle can apply in life sciences when it comes to best practice in the business aspects also.

Entrepreneurs will routinely challenge accepted dogma of how things are done, and they can be

ably supported by knowledgeable professional services advisors and dealmakers who have seen a plethora of solutions to any encountered business challenge.

For this reason, One Nucleus encourages a diverse membership base representing each step of the ideation to commercialisation pipeline.

# Genesis Conference 2025 in Review



The 25th edition of Genesis saw a step change in dynamic, format and attendee mix as the event continued to adapt to the evolving Life Science investment, technology and deal-making landscape. The plenary programme expert speakers debating key topics and the new company showcase pitches provided a depth of content from the platform and fuelled one of the most energetic networking and exhibition areas seen for many years at a conference.

## Creating a London Bio-Innovation Week

As one would expect, the thought-leading speakers raised a number of key themes and challenges, including:

- The industry needs to recover from the current piñata model with the sticks of Inflation Reduction Act, and Most Favoured Nation, patent cliffs, tariffs and financial headwinds suggesting a challenging year ahead but one of immense opportunity.
- Choose your geography wisely to access public sector support and why reforms in the UK are an incentive to get the 'UK to back ourselves'.
- The future will see increasingly interdisciplinary approaches to innovation and varied business models to harness the value of technologies such as AI and Quantum Computing to deliver novel modalities and effective combination treatments.
- The two-way learning opportunity across rare disease and common disease R&D highlighted how greater support and collaboration to ensure collated data and reported outcomes in rare diseases would reassure regulators and payers, whilst onboarding insights from rare disease patient groups on how to engage patients and their families could transfer clinical trial patient engagement from recruitment to proactive inclusion.
- In all collaborations and alliances, things change. Resistance is thus futile. Be mindful to set clear outcome expectations and resources input that both sides are happy with, have a mechanism for discussing adaptations and always maintain open communication.
- UK government and UK investors need to match the confidence in UK excellence shown by international investors and partners when it comes to investing for growth and scale in UK companies, not investing to exit.
- A true call to action emerged from listening to the work of the Patient & Public Voice East Genomics. Projects focused on reaching different ethnic groups, addressing patient fears, innovation in patient experience and finding routes to influence senior medical and public health decision-makers with true real-world input are all currently lived challenges for patients and their families.
- With the ever-increasing rate and technological convergence in bio-innovation, leadership of the future requires excellent ringmasters who maybe do not know how to do all the tricks but are able to drive team performance internally whilst communicating externally to reassure regulators, investors and patients.
- Looking to the future demographics and technological advances by 2050, we could have new medicines that are curative, more informed prediction and prevention coupled with data-driven evidence that enables value-based pricing and reimbursement.

The recordings of all keynote session are available to watch on the One Nucleus YouTube channel.



A series of more expansive blog articles will be produced in the coming months seeking to report on the Genesis 2025 sessions within the context of wider trends and data points within the bio-innovation sector.

Key facts & Figures for Genesis 2025:

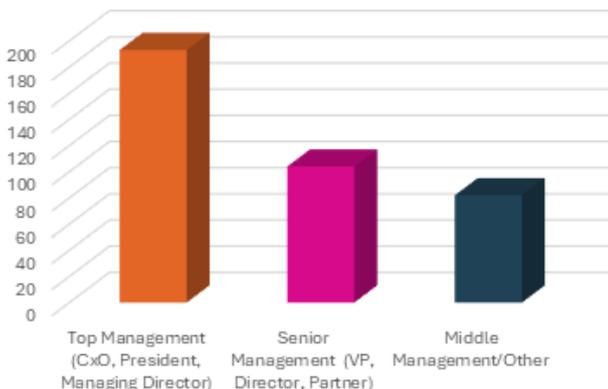
Genesis Attending Companies by Type



- Primary R&D
- R&D Services
- Professional Services
- Trade Support
- Investor
- Press
- Drug Dev & Reg Advisors
- R&D Facilities

- 26% year-on-year growth in attendee numbers
- 43% year-on-year growth in the number of attending companies
- 17% year-on-year growth in proportion of Primary R&D companies attending
- 40 plenary programme speakers
- 40 Company Showcase pitches
- 20 Exhibitors showcasing leading-edge Research & Development, facilities provision and professional services
- 7 Genesis Fringe sessions

Genesis Attendees by Position



London Bio-Innovation Week (LBW2025)

Genesis was an integral element of the inaugural LBW alongside ELRIG, SLAS, Life Science Integrates and Life Science Nation all delivering events that week to bring the translational research and investment community together.



# Genesis 2026

Maximising Returns from Life Science Innovation

1 Wimpole Street, London

10 December 2026

one nucleus™

Strategic Partner

RESI REDEFINING EARLY STAGE INVESTMENTS

## Early Plans for Genesis 2026: Thursday 10 December 2026, London

Continuing the momentum and taking feedback on board, Genesis 2026 will retain the successful elements above, including the Company Showcase, Keynote Programme, 1-2-1 Partnering & Networking App, Exhibition and Fringe. Discussions with the other parties are already underway to explore how we can collectively grow the impact of the London Bio-Innovation Week.



Remaining with the theme of 'Maximising Returns from Life Science Innovation' the conference will again assemble R&D, investment, advisory and policy-making leaders to discuss how the sector is performing, best practices and future outlooks. Whilst it is early in 2026, and it is a dynamic sector, anticipated questions to be addressed at December's event include:

- Has the return of life science investment arrived with new rules to secure capital?
- What is the next scientific frontier in life science innovation?
- Look East, Look West or Both for Bio-Deals in 2027?
- Human vs Machine: Who are the future inventors, regulators and commentators?

### Build Your Own Solution:

Achieving the desired outcomes from attending Genesis absolutely depends on your goals, needs and aspirations. Whether your goals are to:

1. Help shape the discussion about the future of our industry;
2. Showcase your company's value proposition to investors, partners or advisors;
3. Increase profile and engagement with potential customers;
4. Catch up on the latest developments in the sector;
5. Network with your peers as you take stock of developments ahead of the festive break.

One Nucleus has taken a flexible approach to enabling all sponsors, exhibitors, and delegates to choose the participation package that is right for them, their needs and their budgets.

Visit [www.genesisconference.com](http://www.genesisconference.com) for the latest updates and participation offers whilst availability remains.

## Genesis 2025 Sponsors



## Genesis 2025 Exhibitors



# New Initiatives Launched in 2025

Appreciating the challenges One Nucleus members face in accessing the key commercial data sources that enable them to:

- Target the right investors, R&D partners and customers effectively
- Research and build a credible value proposition for their company pitches
- Benchmark their valuations and potential against sources used by investors, Pharma and analysts.

One Nucleus has negotiated access to both [PitchBook](#) and [Biotechgate](#) to add to its own intelligence and connectivity in order to support members with two new initiatives alongside evolving the membership fee structures to reflect a modern two-way relationship with our members.

## Going for Gold

Helping our members navigate their journey to success through accessing data, connecting to the right advisors and making the most of the entire One Nucleus membership.

Key elements are:



- Aimed at R&D-intensive, IP-rich companies
- Dedicated 2-hour **One-ON-One** information session
- Access to databases via One Nucleus including [Pitchbook](#) and [Biotechgate](#)
- Pitching opportunity at the annual [Genesis conference](#), BioWednesdays and other One Nucleus Events
- Enhanced profile in the One Nucleus Gold Member Lookbook
- Includes standard [One Nucleus Gold Member](#) benefits.

## One-ON-One

All One Nucleus members have access to these sessions, which aim to create a customised support package for engagement with One Nucleus.



Key elements are:

- Commercial intelligence deep dive
- Evaluating the breadth of One Nucleus support available
- Identifying external expertise required
- Actions summary and report
- Held in-person or online.

Over the past six months, One Nucleus has tailored this support to deliver curated insights into partnered-asset opportunities, investment and deal-making activity across the East of England and London focused on specific research-related areas, comparator analyses aligned to specific members' needs and support on how to build visibility and credibility within the UK life science ecosystem.

# Supporting One Nucleus Members at BIO-Europe

BIO-Europe is one of Europe's premier biopharma partnering conferences, bringing together thousands of industry leaders from around the world for one-to-one partnering meetings and networking.

Through the One Nucleus–EBD Group collaboration, members are enabled to make the most of BIO-Europe by helping them to reduce their costs, raise their profile and connect with the international Life Science community.

## Registration Discounts

One Nucleus members receive a 12% discount on registration for BIO-Europe events.

## Enhanced Profiling Opportunity

Whether attending in person or not, members can boost their visibility through a dedicated package which includes company logo on the on-stand screen at the One Nucleus stand, display of business cards and collateral and promotion via One Nucleus social media and newsletter ahead of the event.

## Home Base

The One Nucleus stand provides a landmark for members to visit between their partnering meetings, helping them to maximise their engagement with other members and non-members seeking to engage with our network.

One Nucleus was proud to represent our members at BIO-Europe in Vienna in November 2025, showcasing the following organisations taking advantage of our Enhanced Profile offer – Artemida Pharma, Bright Instruments, Cellastral Health, Immune Macro Biotic Technology (IMBT), Outsee, Pharmidex and RxCelerate.

Whilst launching this publication at BIO-Europe Spring 2026 in Lisbon, the One Nucleus team is already looking forward to BIO-Europe 2026 in Cologne and beyond.



# One Nucleus **Boston Bootcamp**

The Bootcamp programme equips UK life science companies with the knowledge and connections needed to navigate and successfully engage with the Massachusetts (MA) life sciences ecosystem. The competition is open to incorporated entities developing novel therapeutics or platform technologies that enable novel therapeutic discoveries.

Congratulations again to the winners of the Boston Bootcamp 2025 who proudly represented the UK in one of the world's most dynamic life science ecosystems!



Over three days, participants gained practical insights into financing and investment readiness and operational and compliance considerations from leading experts, including BioMed Realty, MassBio, Tunnell Consulting, RSM US, Cushman & Wakefield, Taylor Wessing, Gunderson Dettmer, Wolf Greenfield and Cambridge Innovation Partners.

The Boston Bootcamp 2025 experience was enhanced by visits to key ecosystem players, including Life Science Nation, the Whitehead Institute, LabCentral and the British Consulate-General, complemented by informal evening networking.

## Testimonial from Tailor Bio (2025 Winner)

**"Boston is clearly a place where research ideas become companies.**

**The bootcamp was a chance to learn from other UK startups and founders about how they are approaching growth in the US."**

## The Key Learnings

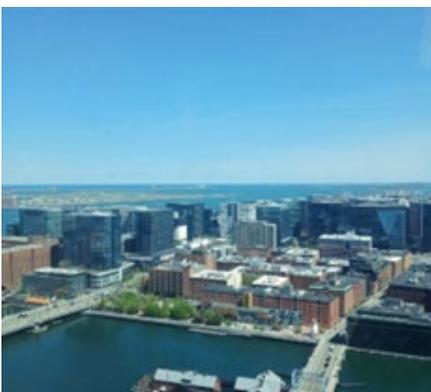


Read

The key learnings from the bootcamp were fed back to the wider One Nucleus community at the ON Helix 2025 conference. You can [watch the discussion](#) or view the summary from [Alicia Gailliez's report](#) post event.



Watch



## Looking Ahead... 27-30 April 2026

The 2026 goals are to build on the lessons learned from the previous visits by delivering a MA-One Nucleus Partnering & Investment Forum, open to bootcamp winners, companies seeking deals in MA and leading UK academic institutions to engage with and pitch to MA-based corporates, investors, academia and philanthropists.

With thanks to our Boston Bootcamp 2026 sponsors:



### The Prize Includes:

- 3-day bootcamp programme
- Return Premium Economy flights LHR-BOS
- 3 nights hotel accommodation
- Pre-bootcamp preparatory sessions with life science experts
- Delegate place at One Nucleus Annual Awards Dinner 2026
- Speaker place at ON Helix 2026
- Company profile in ON Highlights Publication Autumn/Winter 2026
- Opportunity to win a company pitch slot at Bio Europe 2026.

### What Participants Can Expect\*

#### Day 1: Operating in MA

- Overview of the MA life sciences ecosystem and effective ecosystem engagement
- Operational and compliance considerations
- Intellectual Property strategy
- Collaboration with US academia and access to non-dilutive funding.

#### Day 2: MA-UK Translational Science

- Exploring approaches to financing and investment readiness for the US market
- Regulatory/ FDA landscape update and translational research approaches supporting innovation.

#### Day 3: MA-UK Life Science Partnering & Investor Engagement

- Partnering and company pitching sessions to facilitate ongoing deal flow, expansion and collaboration.

Evening receptions will provide further networking and relationship-building opportunities.

### \*Provisional Programme

#### Key Dates

- Competition Launch: 4 December 2025
- Submission Deadline: 6 February 2026
- Winners Announced: by 6 March 2026
- One Nucleus Awards Dinner: 19 March 2026
- Pre-bootcamp activities in April
- Trip to Boston: 27-30 April 2026
- ON Helix Panel Discussion: 9 July 2026.

We look forward to sharing the key messages with you at ON Helix on 9 July 2026!

## Thanks for Joining Us!

ON Helix  
2025

one  
nucleus

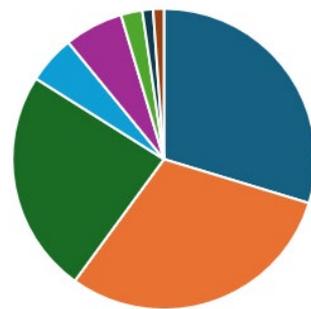


The ON Helix conference advances One Nucleus' mission of fostering a connected ecosystem that accelerates the translation of great innovation into great products that markedly improve patient treatments. The annual Cambridge conference serves as a forum where cutting-edge science meets real-world application, featuring panel discussions and presentations that highlight both scientific detail and translation into patient impact.

Under the headline theme of 'New Horizons for Bio Innovation', ON Helix 2025 saw:

- 200 delegates from over 130 diverse companies engage in thought leadership debate around a range of themes currently shaping the sector. These included Harnessing the Body's Defences; AI in Drug Discovery; Getting Ready for Clinic and Industrialisation of Innovation.
- 22 sponsors and exhibitors
- 32 expert speakers.

Participating Attendees ON Helix 2025



■ CRO/CMO/CDMO/Res. Serv.   
 ■ Professional Services   
 ■ Primary R&D  
■ R&D Facilities   
 ■ Drug Dev Regulatory Advisors   
 ■ Press  
■ Investment   
 ■ Trade Support

You can read the key takeaways in our [One Nucleus Highlights Autumn/Winter 2025](#) or catch up on our YouTube channel



Testimonials from conference attendees

**“ON Helix wasn’t just a conference. It was a call to action.”**

**“A huge thank you to One Nucleus for bringing the community together and spotlighting what’s next for life sciences.”**

**“ON Helix 2025 was a fantastic deep dive into the cutting edge of biotech.”**

**“The energy, insights, and innovation in the room were truly inspiring.”**

Building on this energy, ON Helix 2026 is already shaping up to be unmissable with the theme of ‘Disrupting Bio Innovation’. The topics will spotlight scientific breakthroughs, emerging technologies, new approaches to translation and commercialisation that are set to transform the drug discovery and development landscape.

## What Delegates Can Expect At ON Helix 2026

Delegates can enjoy a day of Keynote Presentations and Panel discussions across:

### Scientific Breakthroughs Disrupting Bio Innovation

A look at areas where biological insights and scientific knowledge are expanding the therapeutic landscape.

### Disruptive Therapeutic Discovery Platform Technologies

How the next generation of therapeutic platforms, enabled by computational approaches and big data are creating value across the drug discovery and development value chain.

### Disrupting Regulatory and Clinical Pathways

Novel approaches to regulatory pathways and clinical trial design and how these are accelerating safe and effective therapies.

### Disruptive Business Models for Translational Research

A look at how non-traditional partnerships, such as small biotech-to-biotech models, cross-sector ecosystem collaborations, and innovative financing, are creating value in the sector.

### Raise Your Profile:

ON Helix offers sponsorship and exhibition opportunities for those organisations seeking to stand out from the crowd.

### Pitching Opportunity

As part of the ON Helix Fringe Event series which takes place on the days around the main conference, there will be a pitching session providing a platform for companies to showcase innovation directly to industry leaders and potential collaborators, helping to nurture further connectivity.

See you at <https://www.onhelix.com/>



Meet Your Next Business Partner at

# ON Helix 2026

📍 Babraham Research Campus, Cambridge

📅 9 July 2026

one nucleus

# BioBeat 2026: Insight, Perspective, Connection

BioBeat has always been more than a date in the diary. It is a meeting ground where science, innovation and entrepreneurship intersect, where ideas are tested, perspectives expand and new possibilities take shape. In 2026, One Nucleus is proud to carry this legacy forward, honouring its history while guiding it into its next phase. On 14 May, at Chesterford Research Park, Cambridge (13.00-18.00), the event will offer an afternoon rich in insight, dialogue and meaningful connection.



At its core, BioBeat champions perspective, particularly the voices and leadership of women whose experiences are shaping the future of UK life sciences. While the event welcomes all, its female-led panels provide a powerful vantage point from which to examine the challenges, opportunities and emerging currents influencing biotech today, with depth, clarity and honesty.

The conference panels will include:

- **The 2026 Biotech Playbook: Trends, Capital & Entrepreneurial Success:** Will explore the shifting playbook of the UK biotech landscape, examining how founders and investors are navigating a recalibrated market. Speakers will discuss evolving investment priorities in 2026; how female founders are responding to capital constraints and what it truly means to be “lean but ambitious” in the current climate. This is not a conversation about trends alone; it is rooted in lived experience. Attendees will gain practical insight into building resilient, investable companies and learn the strategies helping UK biotechs remain competitive on the global stage.
- **The Female Perspective in Rare Disease Innovation:** Will bring rare disease innovation into sharp focus through a female perspective. The discussion will spotlight female-led progress in gene therapy, diagnostics and patient advocacy, alongside approaches for accelerating access and improving equity. Moving beyond celebration by surfacing real-world barriers and opportunities while offering valuable guidance for founders, investors and collaborators.
- **Beyond the Lab: The Medici Effect in Modern Biotech:** Will turn to innovation beyond the laboratory, harnessing the Medici Effect on innovation. Cross-disciplinary thinking is reshaping how biotech organisations solve problems, from drawing inspiration outside traditional scientific domains to cultivating environments that spark unconventional ideas. Founders and leaders will hear how the diversity of thought fuels creativity, accelerates progress, and strengthens teams. The session will challenge attendees to consider whether this form of innovation is a creative luxury or an essential strategy in today’s fast-moving, complex landscape.

BioBeat will create ample opportunity for connection, debate and shared experience. The conversations that unfold over networking between sessions are often as valuable as those on stage, stimulating opportunities for collaboration via discovery of others tackling similar challenges across the ecosystem.

One Nucleus is delighted to guide BioBeat into its next chapter. We recognise the significance of its legacy and view it as a privilege to support its evolution. Our aim is clear: to preserve what makes BioBeat distinctive - honest dialogue, diverse perspectives and meaningful networking - while helping it grow into an even more influential forum for shaping the future of UK biotech.

If you would like to be involved in BioBeat 2026 please contact Philippa Clark [pclark@onenucleus.com](mailto:pclark@onenucleus.com).



# Strengthening Our Commitment: **One Nucleus** in London

One Nucleus has long supported the life science community in London, initially in the form of the London Biotechnology Network (2000-2010) then post-merger with ERBI as One Nucleus. The similarity and differences between the Cambridge and London clusters, respectively helping shape the current One Nucleus perspective and membership offer. What has changed is not our commitment, but our level of focus. We have invested in additional resources, including recruitment of Philippa Clark as Director of Business Development to ensure a dedicated, on-the-ground presence in London, enabling a more hands-on, responsive and connected experience for our members.



## **London as a Global Front Door for UK Life Sciences**

London plays a distinctive role in the UK life sciences ecosystem. The presence of key policymakers and influencers, investors, world-class academic institutions and teaching hospitals, the city offers depth, diversity and global connectivity as an international transport hub to fast-growing biotech, medtech, and healthtech companies.

The proximity of investors, strategic partners and decision-makers creates momentum. For organisations looking to scale, collaborate or raise their international profile, London provides visibility and access that few cities can match. One Nucleus support is complemented by MedCity, the public sector cluster group. MedCity driving London's economic development agenda and One Nucleus bringing business-led support to members looking to grow in London and elsewhere, respectively.

## **Understanding London's Life Sciences Hubs**

As one would expect for a World City, London's is not a single Life Science Hub but a series of localised hubs across the city. Each cluster, whether emerging or established, has its own strengths, identity and challenges so rather than viewing London as a single ecosystem, we are taking a deliberate, place-based approach.

By engaging directly with organisations across the capital, we are building a clearer picture of where support is provided and how companies can identify the locations that suit them best. One Nucleus focusses on how connections can be made that genuinely add value. This insight allows us to help inform both the ecosystems and companies of the needs and opportunities each represents by being grounded in practical knowledge.

## **The Power of Connection**

Connection sits at the heart of One Nucleus's purpose, and London offers a powerful environment in which to bring innovation and business together. Connecting science with investment, emerging companies with established organisations and peers with shared challenges creates opportunities that extend well beyond individual interactions.

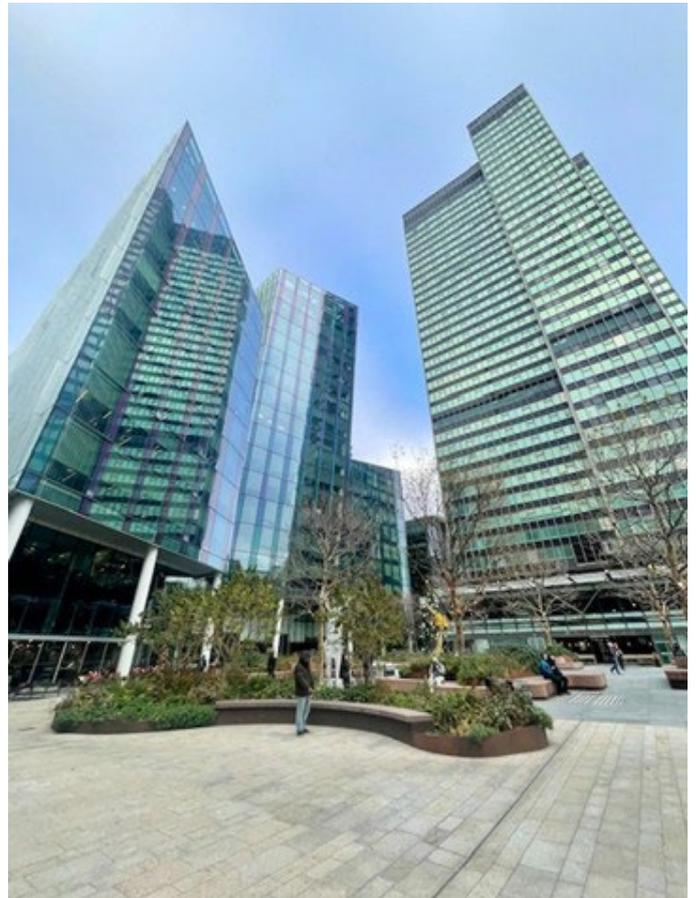
Our role is to create the right conditions for those connections to happen. Sometimes that means structured engagement through focused roundtables or curated introductions. At other times, it is about creating space for informal conversation, including our much-loved pub socials, where relationships often begin and grow organically.

### Events with Intent

Our activity in London is driven by substance, not scale. We focus on events that are purposeful and relevant, from small, highly focused roundtables addressing shared challenges to pitching opportunities that support companies as they move from early innovation to sustainable growth. These engagements are part of an ongoing commitment to support innovation, encourage collaboration and help organisations navigate the realities of growth in a complex and fast-moving environment.

### Being Present, Listening, Connecting

A strengthened presence in London allows us to spend more time with people, meeting organisations where they are, listening carefully and understanding what success looks like from their perspective. This insight shapes how we connect members to each other, to investors, and to opportunities across the wider life sciences landscape.



Images Philippa Clark, One Nucleus



Quotient  
Sciences

Molecule  
to cure.  
Fast.™

# Unlock your molecule's true potential.

**Quotient Sciences is a clinical development and manufacturing accelerator, helping biotech and pharma companies bring new medicines to patients faster.**

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We bring trusted insight to every program to advance molecules through development, driven by an unswerving belief that ideas need to become solutions. And molecules need to become cures. Fast.



## Drug Product Development

Full-service drug product capabilities for your molecule's journey from formulation development to GMP, scale-up, and commercial supply.



## Translational Pharmaceuticals®

Integrated cGMP drug product manufacturing and clinical testing to accelerate development timelines.



## Early Clinical Development

Flexible clinical programs empower you to make confident, informed decisions and streamline your progress through Phase I/II trials.



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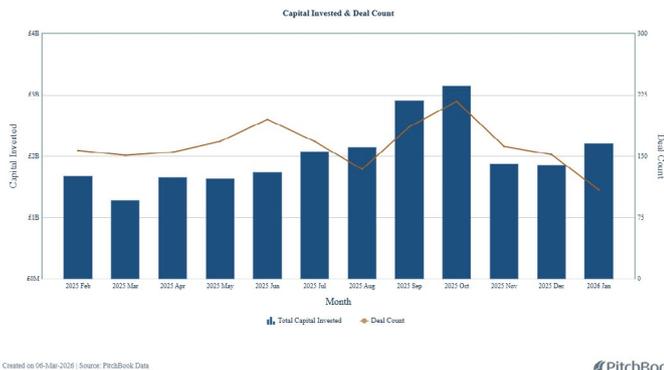
→ [quotientsciences.com/unlockyourmolecule](https://quotientsciences.com/unlockyourmolecule)

# One Nucleus **Global Connectivity**

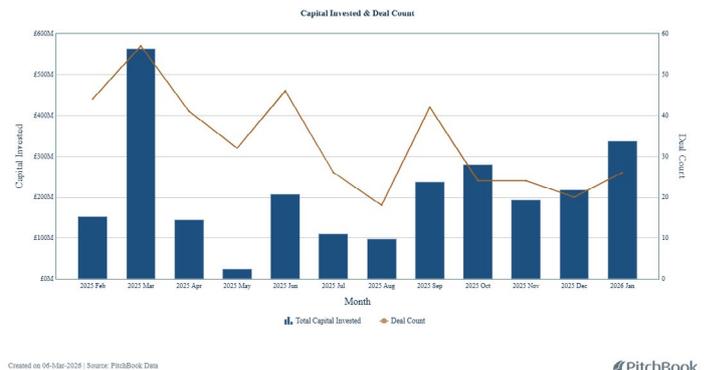
Unmet medical need is a global phenomenon that is driven by a plethora of interconnected factors, including lack of effective treatments, inadequate prevention and early diagnosis and variable access for patients based on geography. One Nucleus members are actively involved in addressing these barriers as they develop and deploy innovative technologies and medicines aimed at improving patient outcomes around the world. The effort to enable R&D, attract investment, and disseminate these advances to patients is also global, with the majority of policymakers, healthcare providers, and advocates accepting the well-documented links between health and economic prosperity. Moreover, numerous regions also aim to attract venture capital and industry investment into research, development and manufacturing of these innovative solutions due to the economic development benefits. 2025 and early 2026 have certainly seen major moves by Pharma to commit investment into both the US and China, perhaps at the expense of other geographies, as a noticeable trend.

## Life Science Deal Flow Beyond Borders

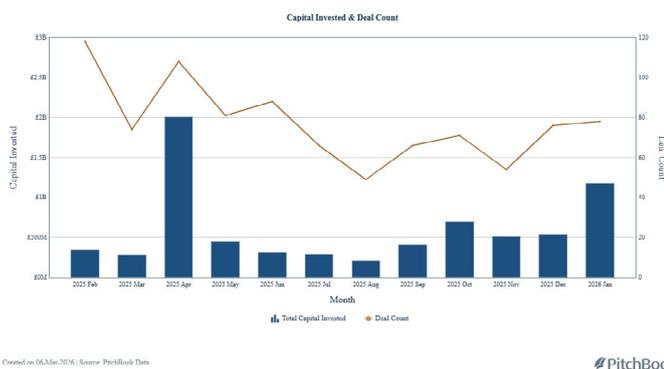
Competition for life sciences investment is a highly competitive arena, whether by companies seeking capital or inward investment teams seeking to fuel economic growth. As illustrated here for Jan. 2025 – Jan. 2026, the global life sciences venture capital deployment of £33.10Bn was dominated by the US, with Europe (including the UK) the second largest destination but now closely followed by China.



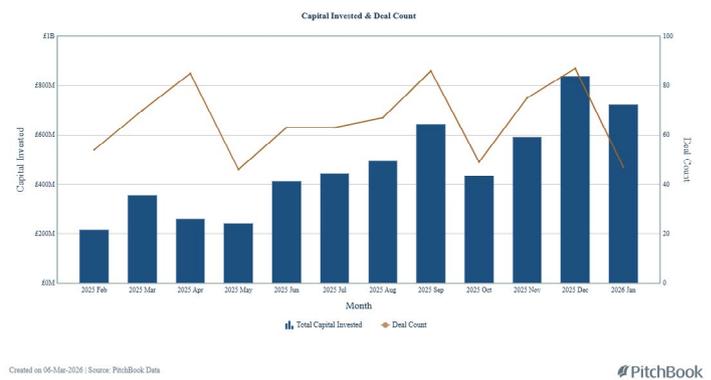
US



UK



EUROPE



CHINA

Delving into the sources, partners and investor syndicates involved in this global effort, however, exemplifies how the causes of ill health do not respect international borders, and neither do those innovating or investing in potential solutions. Winning against unmet need is a collaborative effort of the global life sciences industry. Different geographical ecosystems available to companies offer varying advantages dependent on the stage of development of a business or its products.

Both established and emerging businesses therefore must evaluate which is the best operating location based on need and not simply patriotism or loyalty.

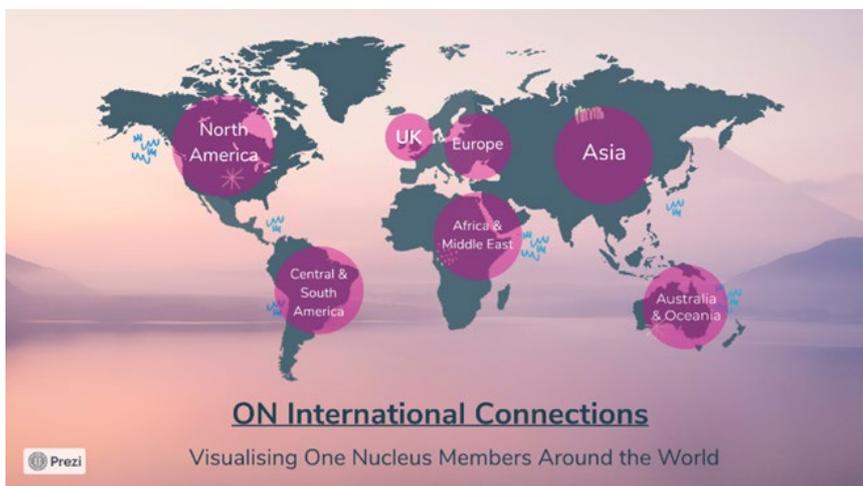
### Selecting the Best Ecosystem

Taking the above reality on board and accepting the underlying dynamic for our members is to innovate through collaboration, adaptability and resilience; supporting our members through connectivity and insight around international clusters is important. It cannot be ignored that securing their collaboration, investment and outsourcing deals is competitive, not least since every player has finite bandwidth to engage. A key driver for One Nucleus is to support our members in being competitive on the global stage by being the best version of themselves, and then beyond that, help them in grabbing the attention they need from others. These two aspects of support are different sides of the same connectivity coin.

Increasingly, even small-to-medium-sized companies have operations in multiple locations as they leverage what any ecosystem has to offer. This could be differentiation on the basis of factors such as research excellence, access to capital, available talent with the right experience, clinical trial infrastructure or appropriate manufacturing capacity. Business incentives, regulations and commercialisation routes can all be influential also. Learning through feedback from our members with international presence or deal flow, along with those groups shaping and promoting various global clusters, we aim to enable our members to make informed decisions based on the best data and conversations.

### One Nucleus Members Connect the Globe

The map below illustrates how global the One Nucleus membership base is. A truly global network creating intercontinental bio-bridges for anyone seeking peer-to-peer connectivity. Scan the QR code to delve deeper into the breakdown.



The One Nucleus international connectivity stretches far beyond our members through three main areas of activity:

### International Biopartnering:

One Nucleus maintains great working relationships with collaborators who deliver global biopartnering and investment forums, securing discounted rates and/or increased profiles for members to ensure they are putting their global competitiveness in the life science shop window. These include via One Nucleus Partners, EBD Group and Life Science Nation (RESI conferences) and collaborators such as BioCentury, NLS Days and BIO China.

### Inward Missions:

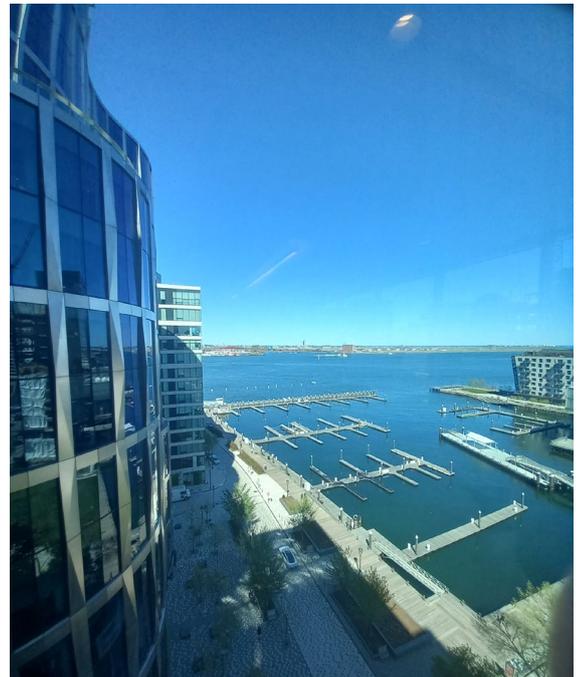
A regular feature of the One Nucleus activities is the hosting of visiting economic development and trade missions from overseas. These can be in person or online, and recent months have included

engaging with delegations from Canada, China, Massachusetts, Japan, North Carolina and Utah. In addition, the sharing of key market intelligence is also key. An example is the regular webinars with Orrick on policy and engagement developments at the FDA.

### International Initiatives:

One of the higher-profile international activities One Nucleus undertakes is the annual Boston Bootcamp. A competition funded by One Nucleus, where the winners receive an expenses-paid trip to Boston to engage with local experts to gain understanding of how to do business in Massachusetts and access US investors and the business incentives available. 2026 will see an expansion of this visit to include key pitching sessions, bringing MA and UK academia, industry and investor audiences together. In addition, satellite events such as breakfast seminars and networking receptions are delivered around the annual BIO International Convention to bring our members together with international peers. Participation at RESI JPM in January, hosting an Ontario delegation at Genesis 2025 and the inaugural One Nucleus – Flanders targeted partnering event, hosted at the impressive VIB research centre, are ongoing initiatives invested in to support our members in accessing dealmaking opportunity forums.

For more information on the One Nucleus international activities, please email [info@onenucleus.com](mailto:info@onenucleus.com)



Boston images: Alicia Gailliez, One Nucleus



Belgium Image:  
Philippa Clark, One Nucleus

# Did You Know **as a Member You Can...?**

Connect via groups in the EU, North America, Australasia & Asia

Save more than your membership fee via member discounts

Post job vacancies online

Be seen as an employer of choice

Access the on-demand library of debates and information

Raise your company's profile

Access the Learning & Development centre for your team

Network with investors, collaborators and customers



As a member you can...

Do [get in touch](#) to learn more about membership benefits and how to maximise the return on your investment.



## Training Overview



# Empower Your Team Through Tailored Training

One Nucleus knows that one size does not fit all when it comes to professional development. We offer flexible, high-quality training courses designed to meet your company needs. Whether you are a small start-up or an established company, we have options that work for you.

Working with industry experts to deliver practical, industry-focused courses ranging from technical expertise to essential business ('soft') skills. The IOSH Approved Biological Safety Management and Practice course is an intensive two-day course, from understanding the importance of managing biological risks in the laboratory through to carrying out suitable and sufficient risk assessments under COSHH and the GMO Regulations. On the softer skills side, we have a range of options from presentation skills training to practical introductions to managing projects, all tailored specifically for those working in the life sciences ecosystem.

## New Opportunities for 2026

Alongside our established training, we continue to develop and introduce new courses and seminars that reflect the evolving needs of the life sciences sector. Recent additions span areas such as intellectual property strategy, pharmaceutical commercialisation and business lead generation, supporting organisations from early-stage spin-outs through to growing biotech companies.

These courses and seminars have been developed in direct response to industry feedback and ongoing conversations with our members, ensuring our programme remains relevant, practical and aligned with real-world challenges. Listening to our community is central to what we do, and we're committed to adapting our training offer as the sector continues to evolve.

View our [Upcoming Training Courses](#) for More Information and to Register

**One Nucleus Upcoming Training Courses**



## Delivery Formats to Suit Your Needs

From in-house delivery, exclusive to one company, to open courses where smaller companies can send individual employees, in-person and online options are available.



### In-House Courses

Our in-house training courses are regularly used by One Nucleus members across academia and industry. Typically, each course runs two to three times each year to support teams at different stages of their careers.

The IOSH-approved Biological Safety course is especially popular with academic institutions. It gives researchers and safety professionals

practical advice on biosafety management, containment levels and working safely with biological materials.

Meanwhile, our Safe Use and Management of Laboratory Gases course has proven to be valuable for companies, including those operating biotech and specialist laboratory processes, offering hands-on insight into the safe handling, storage and management of gases in complex lab environments.

Built around real-world case studies and delivered by experienced practitioners, these courses are designed to be immediately applicable, helping companies to strengthen best practice and meet operational and safety requirements with confidence. Feedback has been consistently strong, with delegates valuing both the relevance of the content and its direct impact on day-to-day work. We work closely with our members to ensure training remains responsive to sector needs and actively encourage organisations to come to us with any training requirements - if there's a need, we'll always try to help find the right solution.

### Supporting Career Growth Through Mentoring

Professional development isn't just about formal training; it is also about guidance, wisdom, and the kind of insights that only come from experience.

The One Nucleus mentoring initiative connects seasoned professionals with those seeking advice, creating relationships that benefit both parties.

### Save with One Nucleus

One Nucleus offers discounted rates for One Nucleus gold and silver members and discounted rates to members of the BIA, Bionow, SLAS and CCRA.

### A Network of Training Providers

We are delighted to be working with a group of member companies offering discounted learning and development services to One Nucleus members.

- [Health & Safety Works](#)
- [Wellcome Sanger Institute](#)
- [My Green Lab](#)
- [Perla Development](#)

In addition, we maintain a directory (sat nav) of external providers within the sector offering training outside of our own portfolio.

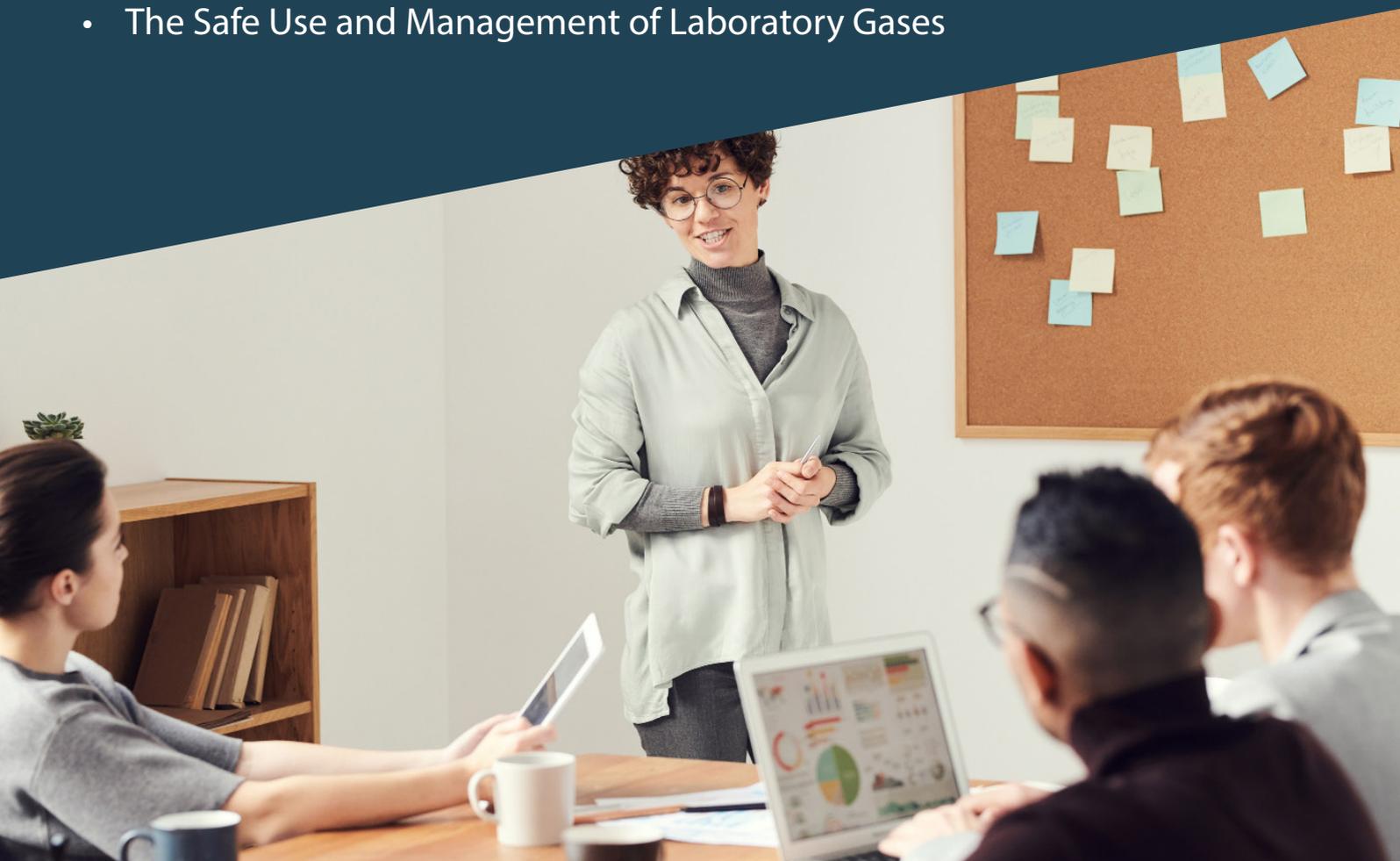
Contact [training@onenucleus.com](mailto:training@onenucleus.com) for more information.



# Up to 30% off Training Courses for One Nucleus Members

## Courses include:

- Introduction to Drug Discovery - From Idea to Clinical Candidate
- IOSH Approved Biological Safety - Management and Practice (2 day course)
- Introduction to Drug Development - From Candidate Selection to Patients in Healthcare
- Introduction to Managing Life Science Projects
- Laboratory Health & Safety
- Presentation Skills for Scientists and for Life Science Professionals
- The Safe Use and Management of Laboratory Gases



Visit [onenucleus.com/training-courses](https://onenucleus.com/training-courses) to see the list of current training course we have to offer.

# Facilities Work Performed

## Facilities Services

Chief Technical Specialist, Richard Dickinson, has over 30 years' experience in life sciences Facilities Management leading on design, fit-out and operational projects. Experience in facilities management followed over a decade in laboratory research, giving Richard clear knowledge of what scientists need and how to deliver it.

Richard has been with One Nucleus for over 17 years and has worked with over 40 companies on their growth and sometimes exiting journeys in this time. Demonstrating Richard's value in the eyes of clients is the high level of repeat business and peer-to-peer referrals for his services which include:

- Identifying available lab space to meet the client needs; Richard often hears about space being available before the Agents, especially sub-lets, due to his extensive client network
- Design and project management of lab and office fit-out projects.
- Relocation projects.
- Dilapidations.
- On site Facilities Management.

2025 clients have included Advent Bioservices, Alloy Therapeutics, Canary Wharf Group, Forth Therapeutics, Gen Two, Constructive Bio, Healx, Howard Group, Insmid Innovation UK, Quotient Therapeutics, T-Therapeutics and Xap Therapeutics.

Case Studies can be viewed [here](#).



## Purchasing Scheme

The One Nucleus Purchasing Scheme is available to all Gold members and provides access to savings on goods and services purchased from our Preferred Suppliers, listed below:

001* – providing utility savings and green energy contracts	Fisher Scientific – providing laboratory consumables, laboratory chemicals, low value apparatus and Life Science Products
Air Liquide – providing laboratory gases	Grundon - integrated waste management and environmental services
BOC – providing dry ice services	STARLAB – providing pipette maintenance and calibration services
Complete* – providing stationery, office goods, IT consumables and office furniture	
Deliver Plus* – providing courier services	

\*discounts are available to Silver members.

## Marketplace

The One Nucleus Marketplace are discounts available to all members from other service providers and include:

<b>Health &amp; Safety Works</b> Health and Safety consultancy	<b>Mathys &amp; Squire</b> Patent & Trade mark attorneys
<b>Haier Biomedical</b> Lab equipment	<b>KISS Communications</b> Marketing services
<b>Restore Harrow Green</b> Lab & office relocation, biobanking, sample storage and disaster recovery	<b>LimestoneGrey</b> Tax advisors
<b>Bright Instruments</b> Laboratory sectioning and cryosectioning solutions	<b>My Green Lab</b> Sustainability training
<b>Labmode</b> Sample storage systems, biobanking technology and laboratory equipment	<b>Perla Development</b> Coaching and training services
<b>Cambridge University CT scanner facility</b> CT scanning services	

See examples of the savings made by a selection of member companies by size in 2025 overleaf.

Contact Richard Dickinson at [richard@onenucleus.com](mailto:richard@onenucleus.com) for further information

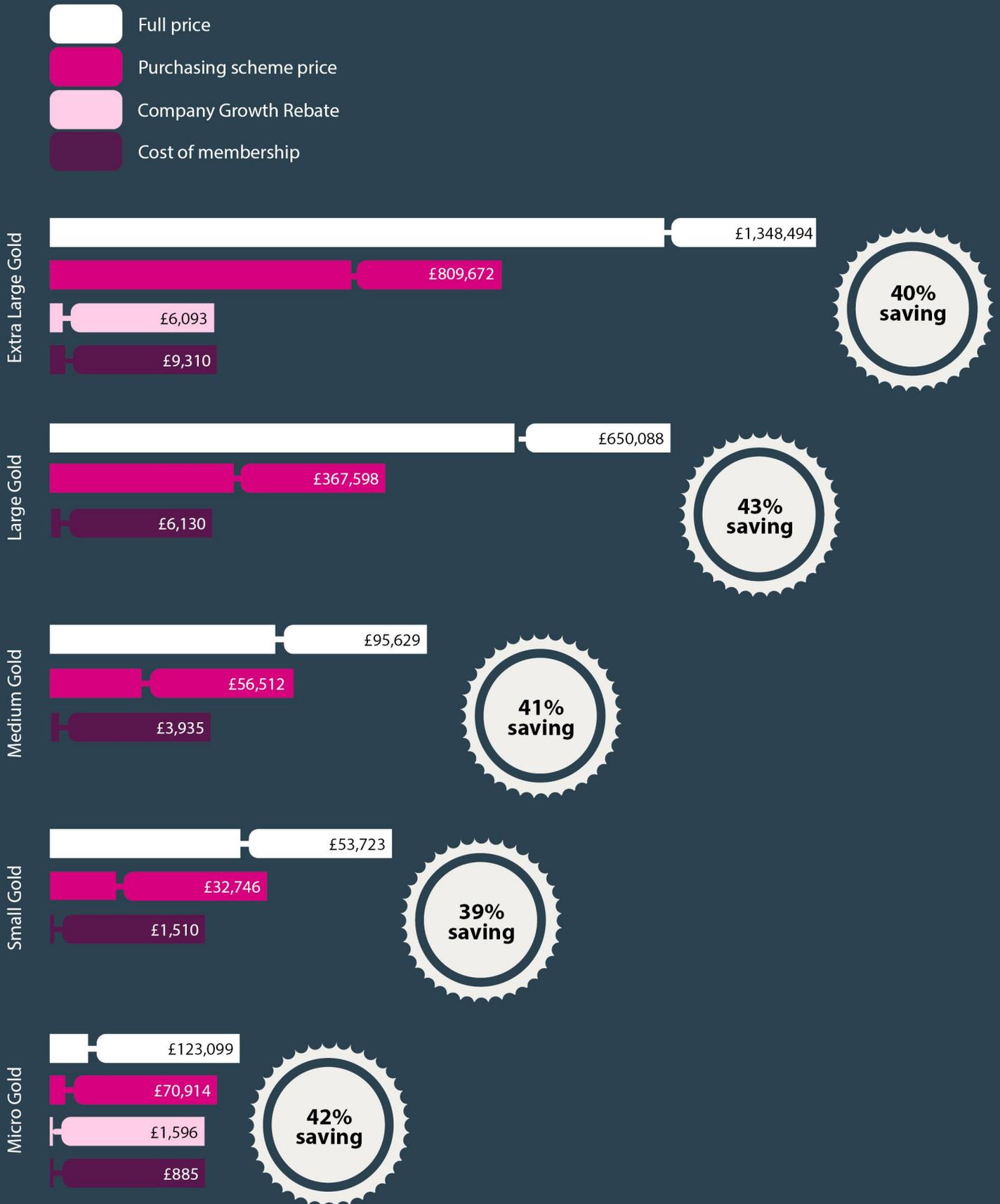


Scan the QR code for information about our Purchasing Scheme

# One Nucleus Purchasing Scheme - Examples of Members' Savings (1/1/25 - 31/12/25)

The chart below provides actual examples of the savings made by a selection of member companies by size, ranging from extra large to micro, using our Purchasing Scheme.

For some, the Company Growth Rebate alone **covered the cost** of membership.



# One Nucleus Membership Benefits

Website & Social	Non-Member	Silver Member	Gold Member
Listed in Online Membership Directory			
Post News to Website & Social Media	£75+VAT		
Advertise Jobs on Website	£75+VAT		
Advertise Events on Website	£75+VAT		
e-Newsletter Sponsorship - banner advert	£800+VAT	£500+VAT	£500+VAT
Advertise in One Nucleus Highlights	£750+VAT	£500+VAT	£500+VAT
<b>Events</b>			
ON Helix Delegate	£545+VAT	£435+VAT	£325+VAT
Genesis Delegate	£545+VAT	£435+VAT	£325+VAT
BioWednesdays	£50+VAT		
Innovation Seminars	Invitation Only		
<b>Services</b>			
Training		15% Discount	30% Discount
Facilities Management Consultancy Day Rate*	£1,240+VAT	£1,055+VAT	£875+VAT
Preferred Supplier Discounts		 **	
Access M2M Marketplace Discounts			
Access to Themed Interest Groups	£50+VAT	£30+VAT	
Employer of Choice Sessions	Invitation Only		
Access to On-Demand Library	Restricted		
<p>*All prices are exclusive of expenses.  **Access to some but not all.  Prices correct at time of print.</p>			

# Accelerator™ Drug Development

Accelerating your unique drug development journey with innovative 360° CDMO, CRO, and Bioprocessing solutions, supporting your aspiration to get treatments to patients faster.

Explore Accelerator™ Drug Development solutions

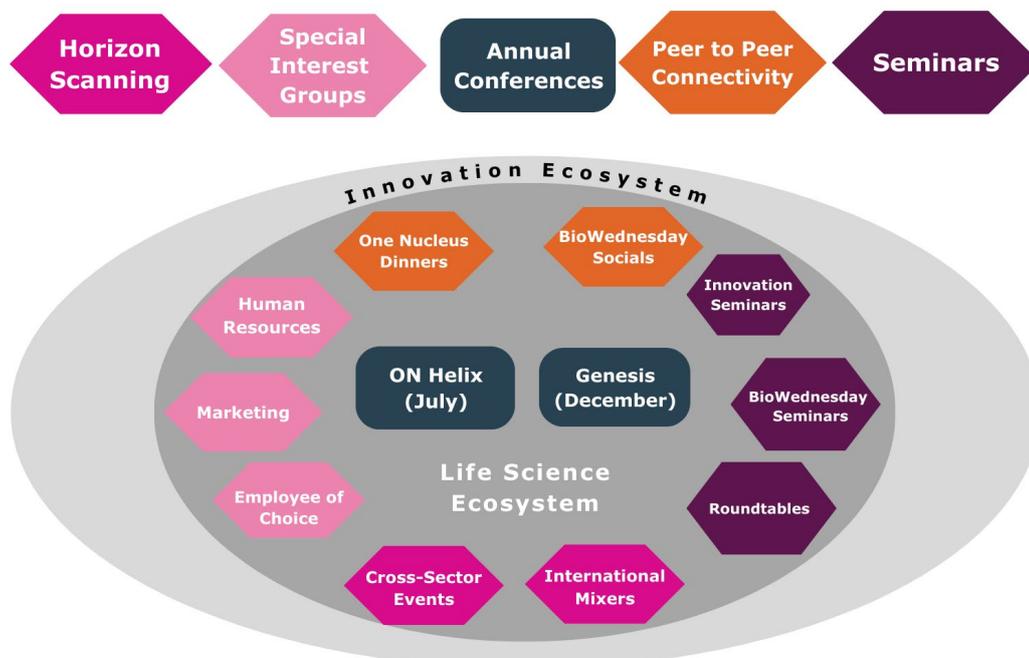


# Peer-to-Peer Knowledge Sharing via One Nucleus Events and Conferences

The One Nucleus events portfolio has been strategically curated to foster peer-to-peer knowledge sharing and facilitate collaboration and business across the life science innovation ecosystem. Through a diverse range of forums, we provide our network with an environment for deal flow, be those deals investment, R&D agreements, outsourcing, lab leasing or any other transactions necessary for success.

Our events provide:

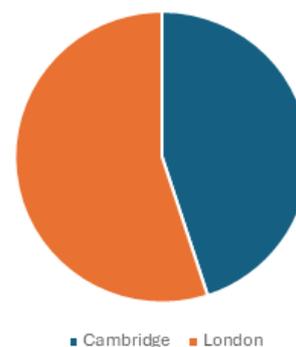
- A trusted environment for engagement where professionals can share insights, explore shared challenges and identify solutions
- Facilitation of introductions, pitching opportunities and conversations that can lead to new partnerships, investment or key advice
- Dissemination of best practice by presenting and discussing key updates on areas such as policy, talent development, regulation or emerging technologies
- Release of registered attendee lists ahead of the event to maximise the connection power
- Targeted attendee invitations where appropriate to enable informed, closed meeting discussion.



Over the past six months, our non conference events programme has had a strong and deliberate balance across our regional ecosystems with 11 events delivered in London and 9 in Cambridge, demonstrating the positive impact of having dedicated resource supporting both ecosystems.

Our events attract a mix of members and non-members, highlighting the opportunity for attendees to engage with a broad and inclusive range of stakeholders. Members benefit from free and discounted rates, making membership the most cost-effective way to build strong relationships and enhance brand visibility within our community.

Event location over the past six months



## Below are some standout topics from the last six months:

### **BioWednesday London: Ones to Watch – Spotlight on Neuroscience:**

This event, hosted at Queen Mary University of London, highlighted pioneering neuroscience companies who are developing innovations with the potential to transform how we understand, diagnose, and treat brain-related conditions.

This event featured company pitches from 12 organisations showcasing the breadth of innovation happening across this field.

Watch this space as we plan to continue this new format in future editions of our BioWednesdays, providing further key investment and collaboration opportunities!

### **Navigating the Competition for Investment: Strategies to Help You Stand Out:**

During London Life Science Week, One Nucleus had the pleasure of collaborating with EIP and tranScip on an event focused on bringing together innovators and advisors to explore the critical factors in navigating the competition for investment.

**Understanding the Australian Life Science Ecosystem for Early Clinical Development:** One Nucleus was privileged to support two collaborative events in London and Cambridge in collaboration with 360biolabs, a BioAgilytix company, and partners, Veritus Research, Beyond Drug Development and Prime Financial Group, exploring Australia's unique position as a global leader in early clinical development.

These sessions reflect exactly what One Nucleus sets out to do – support our members with the strategic insights they need to accelerate their R&D and help them reach critical milestones for dealmaking in the process.



# One Nucleus Corporate Patron and Sponsors

Corporate Patron



Corporate Sponsors



One Nucleus Partners

The logo for Advent Life Sciences, with "Advent" in black and "Life Sciences" in green, both in a sans-serif font.

The logo for Agility Life Sciences, with "Agility" in blue and "Life Sciences" in a smaller blue font below it.

The logo for Babraham Research Campus, featuring a grid of grey dots to the left of the text "Babraham Research Campus" in blue.

The logo for BioMed Realty, featuring a blue stylized "B" icon above the text "BioMed Realty" and "Discover here" in blue.

The logo for Cambridge Innovation Capital, featuring a vertical bar with four small squares to the left of the text "CAMBRIDGE INNOVATION CAPITAL" in black.

The logo for EBD Group, with "EBD" in large red letters and "GROUP" in smaller black letters below it.

The logo for EY, featuring a yellow chevron above the letters "EY" in black, with the tagline "Building a better working world" below.

The logo for LBIC, featuring a stylized sunburst or starburst graphic in blue and purple above the letters "LBIC" in black.

The logo for Lilly, featuring the brand name in a red, cursive script font.

The logo for Life Science Nation, featuring a green hexagonal icon with a white pattern to the left of the text "LIFE SCIENCE NATION" and "Connecting Products, Services &amp; Capital" below.

The logo for Penningtons Manches Cooper, featuring a black square icon with a white "P" to the left of the text "PENNINGTONS MANCHES COOPER" in black.

The logo for PharmaVentures, with "PharmaVentures" in blue and orange, and "the deal experts" in a smaller blue font below.

The logo for QMB Innovation Centre, featuring a blue square icon with "QMB" in white, and "Innovation Centre" and "QUEEN MARY BIDENTERPRISES" in blue text below.

The logo for Sciad, with "Sciad" in a bold black sans-serif font and "Bringing innovation to life" in a smaller black font below.

The logo for Stevenage Bioscience Catalyst, featuring a green wave icon to the left of the text "STEVENAGE BIOSCIENCE CATALYST" in black.

The logo for TUSPARK UK, featuring a purple and yellow stylized flower icon to the left of the text "启迪英国" and "TUSPARK UK" in black.

The logo for Wellcome Genome Campus, featuring a colorful circular icon to the left of the text "WELLCOME GENOME CAMPUS" in black.

The logo for Withers &amp; Rogers, featuring the brand name in black and a blue and white icon to the right, with "Patents · Trade Marks · Designs" in a smaller black font below.

## **Innovation Statement – a call to global biotechnology action**

Harmonising, defragmenting, accelerating, and scaling were the common goals identified in an inaugural meeting of biotechnology associations from across three continents at BIO-Europe in Vienna. The groups discussed their ecosystems in 2025 and their priorities for 2026, to deliver BIO Europe's inaugural Innovation Statement for this globally critical technology.

Key bottlenecks to robust biotechnology sectors were identified across the groups, with proposed solutions and directions for development. The intention is to convene twice per year at events in the BIO-Europe conference series to expand global collaboration, engage global policy makers and call for harmonised policy action across countries.

## **The growing strategic significance of biotechnology**

The Innovation Statement reflects priorities from a broad biotechnology coalition, including biotechnology associations representing regions and countries of all sizes from Europe, Asia and North America, with many inside larger blocs such as the EU. Some have relatively mature life science and biotech ecosystems, with high political awareness, whilst others are growing recognition, capacity and economic footprint. In many areas, primary conventional sectors have often taken priority, such as automotive and steel, with biotech positioned as a future competitiveness angle. However, now, such existing sectors are being identified as insufficient, and the high-tech agenda is gaining momentum.

## **Geopolitical shock and urgent action**

2025 delivered a profound geopolitical shock to biotechnology innovators and markets. In addition to existing strains to the ecosystem from Covid and the ongoing war in Ukraine, the imposition of tariffs and the move towards most favoured nation pricing were sources of further destabilization. These factors are reshaping innovation and manufacturing pathways globally.

This has focussed political and financial attention towards key deliverables for biotechnology regions. The removal of barriers to ensure access to services, capacity and strengths that match innovation needs is identified as the key action area for change. Innovation must be able to grow and move without complexity.

Response to the geopolitical shock has also changed priorities and timescales for action. Improving regulatory frameworks and skills capacity has become a competitiveness priority, with regions such as the EU and Canada taking significant actions, targeting changes that increase market access, speed and scale.

The defragmentation of markets is critical. This includes clinical trials, which experience fragmentation on multiple levels, the ability to grow home-based innovation and to open international markets. Movement across borders is integral to this, whether across regions in the same country, or across larger blocs.

## **A global call to action for innovation and delivery**

The focus is on well-connected critical mass of biotechnology growth, not just the headline grabbing unicorns, but resilient, long lasting industrial activity. Coherent and ambitious government policy is central. Regulatory reform has already been initiated in regions, including the EU, which is undertaking a series of regulatory simplification omnibus legislations plus a dedicated Biotech Act, with Part I launched in December 2025.

Global Associations call for the key ambitions for biotechnology growth to:

- Unlock locally generated intellectual property and drive better commercialisation
- De-risk long term investment for innovators, compared to short term exit from overly de-risked early investment
- Connecting regional with national and international pathways
- Enable growth through geographical mobility, agility and scale
- Simplify and defragment regulatory frameworks
- Contribute into emerging biotech applications such as defence, especially where conventional defence is not a national capacity
- Benefit from a disrupted skills market and build value within key technology platforms
- Develop and strengthen trade deals and partnerships

### **Attending Organizations:**

- Atlanpole (FR)
- BioM (DE)
- BIOQuébec (CA)
- Biosaxony (DE)
- Biotech Austria (AT)
- BIOTECCanada (CA)
- Biowin (BE)
- BIODeutschland (DE)
- CEBR (EU)
- EuropaBio (EU)
- Finnish Bioindustries (FI)
- France Biotech (FR)
- HBio (GR)
- Hollandbio (NL)
- International Contract Pharma Association (IN)
- Life Science Nord (DE)
- Life Sciences British Columbia (CA)
- Mabdesign (FR)
- Mediwales (UK)
- Navarra Health (ES)
- OBN (UK)
- One Nucleus (UK)
- Oslo Cancer Cluster (NO)
- Pbio (PT)
- Prague.bio (CZ)
- Swiss Biotech Association (CH)

For more information see <https://informaconnect.com/bioeurope-spring/>

# Pressure-Test Your Value Before Partnering: Because Value Is Proven Under Scrutiny

In today's competitive deal environment, strong science alone is no longer enough. Investors and industry partners increasingly scrutinise differentiation, reimbursement feasibility, pricing sustainability, and real-world uptake, often before serious deal discussions begin.

The question is no longer "Is the data promising?" It is: "Will this asset succeed commercially, and how compelling is the value proposition under scrutiny?"

We recently supported the European subsidiary of a global pharmaceutical company evaluating an in-licensing opportunity for a late-stage oncology maintenance therapy in a competitive European market. The mechanism was validated and efficacy signals were encouraging. Yet several commercially critical uncertainties could materially alter valuation.

The scrutiny centred on four core areas:

- **Comparator credibility.** The pivotal study relied on a non-active comparator in a setting where multiple therapies are standard practice. In several European markets, this can lead to restricted reimbursement, price reductions, or conclusions of "no added benefit," regardless of the strength of the clinical benefit.
- **Generalisation of clinical evidence.** The dataset was generated predominantly outside Europe. The key issue was not clinician's willingness to prescribe, but whether HTA bodies would treat population differences as unresolved uncertainty, resulting in requests for additional evidence, subgroup restrictions, or delayed decisions.
- **Differentiation in a mature class.** The product entered an established therapeutic landscape with well-established prescribing patterns. Without clear superiority in survival, tolerability, or patient-relevant outcomes, new entrants are often treated as interchangeable, shifting negotiations toward price.
- **Pricing durability under generic pressure.** Benchmark therapies in the class were approaching loss of exclusivity.

In several European systems, generic entry reshapes price ceilings through automatic benchmarking or renegotiation. A viable launch price is not necessarily a sustainable one.

The evolving EU Joint Clinical Assessment added another layer. Shared clinical conclusions can influence multiple national decisions simultaneously, magnifying early uncertainties. The question was not only what evidence to submit, but when.

To move beyond assumptions, we pressure-tested the asset's value proposition through focused commercial due diligence across key European markets, combining targeted research with interviews among clinicians and payers. Insights were translated into an assumption-driven forecast model grounded in real-world stakeholder decision-making rather than best-case projections.

Specifically, the work:

- Distinguished regulatory approval from realistic commercial access.
- Identified markets where reimbursement risk was materially higher.
- Reframed pricing expectations considering competitive and generic dynamics.
- Stress-tested peak sales under conservative adoption assumptions.
- Clarified which uncertainties could be addressed through further evidence and which would limit value.

The outcome was immediate clarity. Instead of advancing on best-case assumptions, the client recalibrated its evaluation around quantified commercial realities and entered licensing discussions with greater confidence and negotiating leverage.

Value proposition testing is not a procedural step. It is a strategic tool to maximise partnering deal outcomes.

Before your next licensing discussion, ask yourself: **have you pressure-tested your asset's value the way your counterparty will?**

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