

House  
OF LAB SCIENCE



# Lab science, inovation and business

[www.houseoflabscience.world](http://www.houseoflabscience.world)

# Why the House of Lab Science



Laboratory technologies are becoming the decisive factor for the pace of innovation in research and development in all life sciences disciplines



Global shortage of laboratory space, particularly for startups, in Switzerland (and beyond) for the growing life sciences sector, a key pillar of the Swiss economy and an industry of the future



Vacant commercial spaces and oversupply of simple office spaces, especially post pandemic and for peripheral regions

# A single point of contact for orchestrating innovation parks

The "House of Lab Science" is set up to provide the life sciences sectors in Switzerland with innovation clusters where large companies, SMEs, industry associations, startups and the best talents can be found under one roof.

Our mission is to enable ground-breaking developments in the lab and life sciences, by fostering collaborations between all those stakeholders, which are quickly and easily established and implemented in concrete projects.



# The four pillars of the House of Lab Science



Ecosystems  
with clear  
innovation  
profiles



Scalability  
through  
community-  
building and  
new locations



Services 4 Lab  
as a Service



Life-long learning  
in our Lab Science  
Academy



Our offering is twofold: A one stop shop for

- 1) Lab as a Service
- 2) Services 4 Lab as a Service

*We take care of our tenants' non-R&D-related activities, i.e., lab, facility, innovation and ICT management.*

*Like this, the members of the HLS community can free their mind and focus only on the science, on developing innovations, and on successfully growing their company.*

# Services 4 Lab as a Service



## Lab management

Lab space | Biowaste disposal | Lab equipment | And much more



## Innovation management

Scouting | Matchmaking days | Personalized newsfeed | And much more



## Facility and ICT management

Collaboration rooms & small offices | Avatar reception service | WiFi, firewall & VPN | And much more



## Lab Science Academy

Collaboration with Swiss university of applied science | CAS and MAS for life sciences applications | Workshops & events with students, professionals & the broader public | And much more



# Customer segments and profiling



## LIFE SCIENCES STARTUPS

### Profile

- In need of lab tech, infrastructure for analytics & diagnostics
- Key topic: **Digitization** of labs
- Maturity level > 2 years
- Minimum rental period > 2 years

### Benefits

- Affordable lab space with lower sqm prices than in the city with long waiting lists
- Community services
- Ecosystem effect due to incumbents (e.g. HSE, Tecan) and other startups in the neighborhood

## PROFESIONALS

### Profile

- Employees in the Life Sciences industry
- Career change / re-orientation
- Education in IVD and Life Sciences Systems and Project Management

### Benefits

- Executive education and CAS certificates
- Training for the employees looking for innovative solutions for lab tech
- Training for the employees of subcontracting companies

## MATURE LIFE SCIENCES COMPANIES

### Profile

- Fast growing business in Life Sciences and IVD
- Battle of talents
- Need to secure high level of IVD competence throughout the supply chain

### Benefits

- Time to market
- Efficiency gains
- High quality and compliant products

## PROPERTY OWNERS AND MANAGERS

### Profile

- Industrial space not easily rented out
- More than 3000sqm vacant
- Willing to invest in valorizing and repurposing buildings

### Benefits

- Valorization of vacant spaces/ buildings
- Steady and higher rental payments
- Part of a flourishing ecosystem

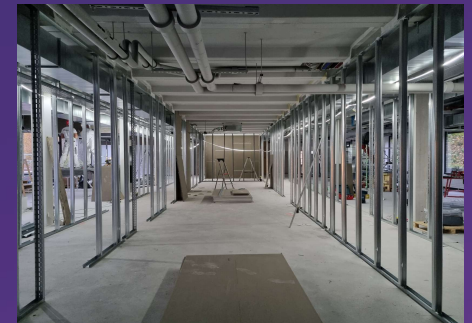
# Proof of Concept: The first House of Lab Science is established and running in Hombrechtikon, ZH



Pre



launch



Post



launch





# Since the launch in August 2022, we have already acquired paying community members on our platform



"By partnering with the House of Lab Science, actesy is at the pulse of the newest developments in life sciences and lab technology."



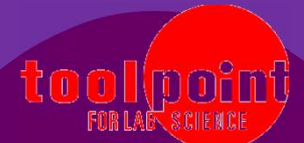
"Innovation needs collaboration. Collaboration needs interaction & exchange, and the House of Lab Science provides all these elements in a very elegant & modern environment."



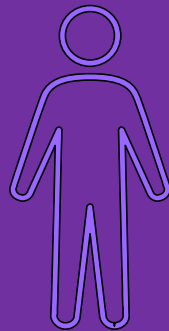
"As a startup, we joined the community because the House of Lab Science's marketplace is the place to be for us."



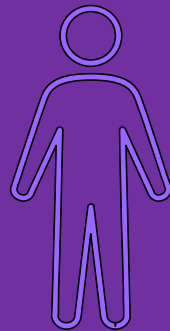
"As a global market leader for lab automation, we are part of a vibrant community to boost career paths within HSE."



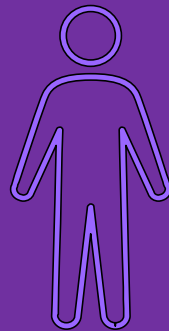
"Toolpoint is the association for lab automation. Our four annual events are run by the House of Lab Science."



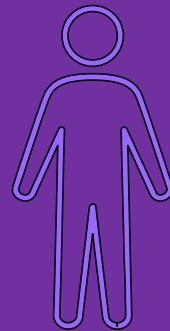
Dr. Andreas Imthurn, CEO



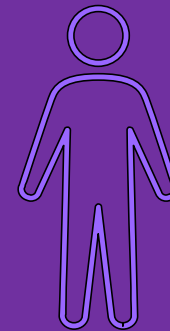
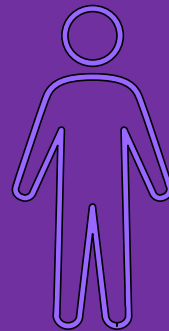
Dr. Achim von Leoprechting, CEO



Philipp Osterwalder, CEO



Dr. Michael Collasius, CEO



Hans Noser, Managing Director



# Our management team: Entrepreneurs that have been successful will be successful again!



Hans Noser

Chairman & Co-Founder

- Serial entrepreneur & clusterpreneur (informatics, engineering, life sciences) who founded 17 companies out of 15 are still around
  - Chairman of HSE AG
- Managing Director Toolpoint, the Swiss industry association for lab technology
- Innovation expert (former vice president of Euresearch)



Dr. Christian Hugo Hoffmann

CEO & Co-Founder

- Co-founded three ICT startups (with one still running, and one successful exit)
- Former Head of Finance at Verity Studios AG, led financing round of CHF 18M
- Finance expert (Assistant Professor of Finance)
  - Startup Grind Director Geneva



Oana Monica Vrabie

Community Building & Co-Founder

- Marketing and Communications Manager, MassChallenge, one of the largest startup accelerators worldwide
- Huge network to biotech and medtech startups in Switzerland and beyond
- Very experienced community builder
  - Startup Grind Co-Director Geneva

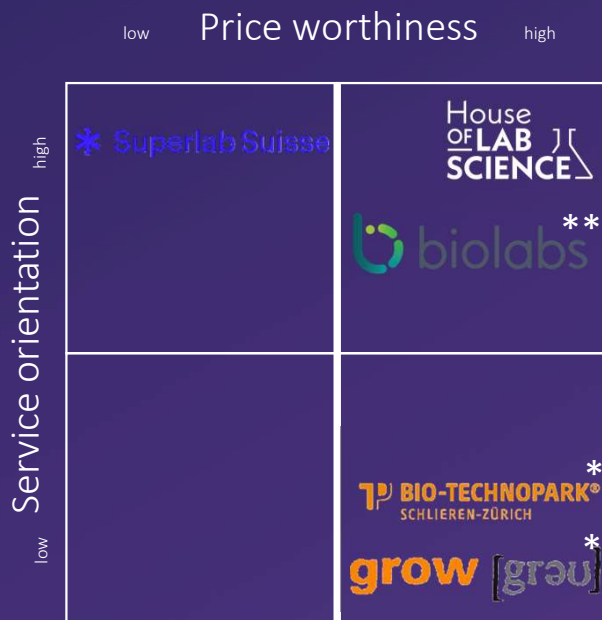


Dr. Jay Siddharth, MBA

Chief Strategy Officer

- PhD in Biotechnology, eMBA from EPFL
- 13y + of experience in industry, e.g., Novartis and Nestlé
- Former Chief Scientific Officer at Bioseutica BV, and Chief Innovation Officer at Healiva SA as well as Investment Director at ADM International Sarl

# Competition: The House of Lab Science is outperforming in service orientation and price worthiness



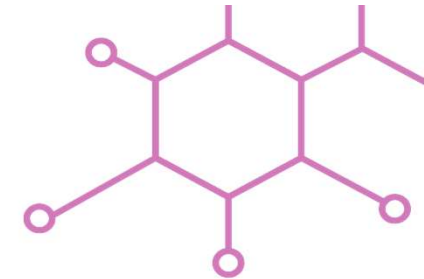
\* Not profit-oriented

\*\* Not in Switzerland

The House of Lab Science is substantially outperforming other providers of wet labs across categories:

- *Price worthiness:* The other private competitor in Switzerland, Superlab Suisse which has partnered up with SPS, prices its services into the lab rent which makes their labs comparatively expensive (around CHF 1'000 per sqm and year) and which assumes that tenants would ask for a one-size-fits-all offering. The latter is not the case. Therefore, at the House of Lab Science, tenants find affordable lab space (around CHF 500 per sqm and year) and, on top of that, can choose from our broad list of services (60+) those which serve their individual needs best.
- *Service orientation:* The public players do not offer serviced, ready-to-move-into laboratories which would allow companies to focus their investment on innovation rather than fitting out space. The productivity, and thus loyalty is much higher in places where a high service comfort is provided.

# A big market opportunity for real estate: Life sciences from the European perspective



- **Key locations:** UK, Germany, the Netherlands, France, Switzerland
- **Drivers of demand:** demographics, increased funding, R&D increased spending, increased patent applications, access to talent
- **Investors' preferences** show the emergence of alternative sectors in real estate and have a positive outlook on life sciences real estate
- The Triple Helix = **industry, academia and government** which collaborates well is a must-have ecosystem
- Every €1bn of **raised capital creates a real estate demand** of 46'000 sqm. On average, a time delay of 12 to 18 months between capital raised for the sector and real estate demand (Savills)
- The **investment volumes** rise from the 1% annual average of the last cycle to **closer to 5% in this new expanding investment cycle** (Colliers, July 2021)
- The **main challenge** is the **scarcity of deals**, due to the niche being mainly owner-occupied, the bespoke needs of the tenants and the limited local expertise

Overall prospects		Rank	Investment	Rank	Development	Rank	Income
1	New energy infrastructure	1	4.81	2	4.60	4	4.36
2	Life sciences	2	4.65	4	4.49	2	4.48
3	Logistics facilities	3	4.60	3	4.55	3	4.41
4	Data centres	4	4.55	1	4.63	1	4.49
5	Health care	5	4.46	6	4.31	5	4.19
6	Retirement/assisted living	6	4.44	5	4.33	8	4.13
7	Industrial/warehouse	7	4.40	8	4.25	7	4.18
8	Affordable housing	8	4.33	9	4.22	13	3.88
9	Self-storage facilities	9	4.32	12	4.13	9	4.10
10	Private rented residential	11	4.29	7	4.27	10	4.07
11	Housebuilding for sale	10	4.29	10	4.21	6	4.18
12	Social housing	12	4.15	11	4.15	12	3.90
13	Multi-let/flexible industrial parks	13	4.09	13	3.98	11	3.91
14	Co-living	14	3.96	15	3.88	15	3.76
15	Student housing	15	3.93	14	3.93	14	3.79
16	Serviced apartments	16	3.84	16	3.72	16	3.64
17	Flexible/serviced offices and co-working	17	3.74	17	3.54	18	3.45
18	Leisure	18	3.74	18	3.41	19	3.37
19	Central city offices	19	3.60	19	3.35	17	3.48
20	Retail parks	20	3.56	22	2.98	20	3.29
21	Business parks	21	3.40	20	3.10	21	3.13
22	Hotels	22	3.36	21	3.05	23	3.00
23	Parking	23	3.12	23	2.80	22	3.03
24	Suburban offices	24	3.01	24	2.79	24	2.90
25	High street shops	25	2.82	25	2.48	26	2.59
26	Out-of-town shopping centres/retail destinations	26	2.79	26	2.32	25	2.62
27	City centre shopping centres	27	2.69	27	2.32	27	2.54

● Generally good = above 3.5 
 ● Fair = 2.5–3.5 
 ● Generally poor = under 2.5

Source: Emerging Trends Europe survey 2022

# Target life sciences locations: Germany, UK, Switzerland, France, the Netherlands

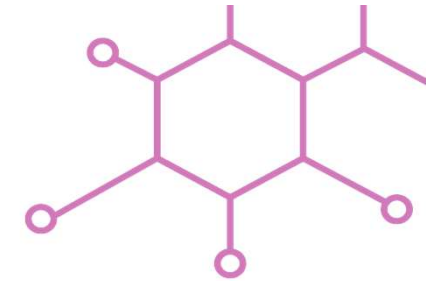
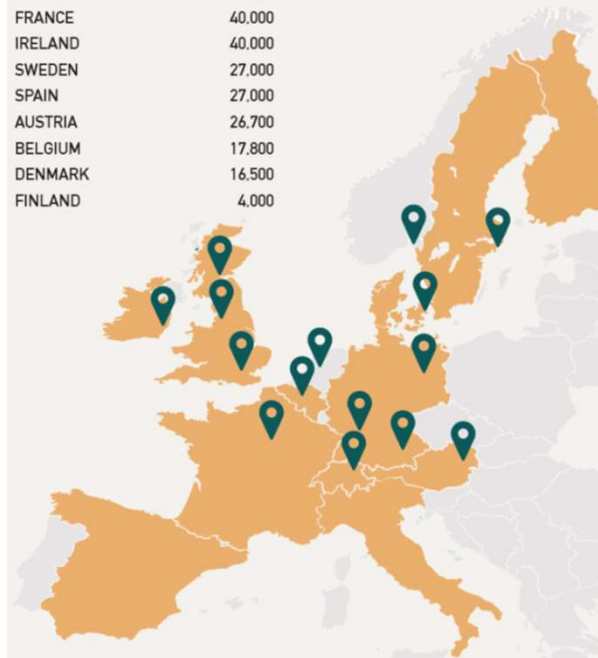


FIG.4 LIFE SCIENCE CLUSTERS AROUND EUROPA -

TOP 11 COUNTRIES ACCORDING TO EMPLOYEES IN THE MEDICAL-TECHNICAL FIELD

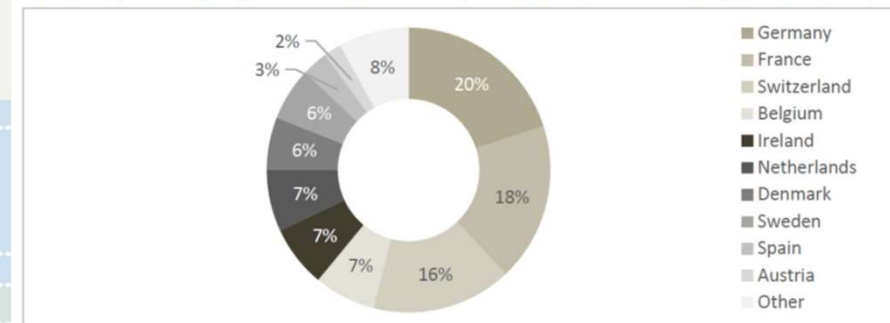
GERMANY	210,000
UK	102,800
ITALY	94,000
FRANCE	40,000
IRELAND	40,000
SWEDEN	27,000
SPAIN	27,000
AUSTRIA	26,700
BELGIUM	17,800
DENMARK	16,500
FINLAND	4,000



Source: Catella Research, medtecheurope, Sanofi, ULI, Colliers, fDI Markets

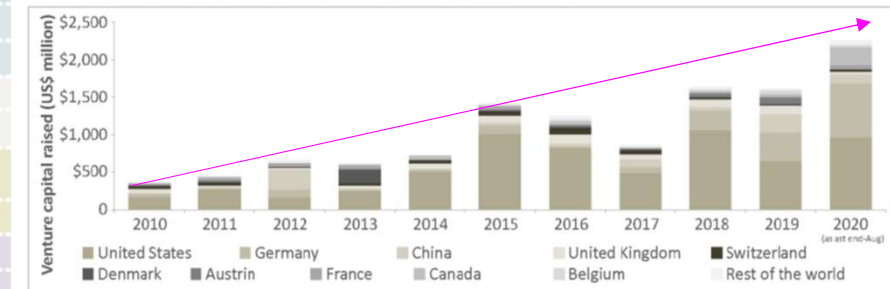
COUNTRY	REGION	CITIES/REGIONS IN CLUSTER
GERMANY	Cluster Gesundheitswirtschaft	Berlin – Brandenburg
	BioRN/Rhein-Main-Neckar	Frankfurt, Mainz, Wiesbaden, Darmstadt, Heidelberg, Mannheim, Ludwigshafen, Karlsruhe, Stuttgart
	BioM	Munich/Bavaria
UK & IRELAND	Golden Triangle	London, Cambridge, Oxford
	North-West England	Liverpool, Manchester
	Scotland	Edinburgh, Glasgow, Perth
	Biotech Cluster Ireland	Dublin, Cork, Limerick, Waterford, Galway
AUSTRIA & SWITZERLAND	LISAvienna	Vienna
	Life Science Cluster Zurich	Zurich
FRANCE	Medicen Paris Region	Paris/Île-de-France
	Grenoble Alpes Bio Network	Lyon, Grenoble, Geneva
BELGIUM & NETHERLANDS	Ghent Bio-Energy Valley	Brussels, Antwerp, Geneva, Mechelen
	Life Sciences Hub	Leiden, Rotterdam, The Hague
NORDICS	Uppsala BIO	Uppsala, Stockholm
	Medicon Valley	Copenhagen
	The Life Science Cluster	Oslo
INTERNATIONAL	Bio-Valley	Strasbourg, Freiburg, Basel

European (excluding UK) life sciences venture capital Investment since 2008 (% share of total)



Source: Savills Research (Mar 2020), PitchBook

Venture capital raised by vaccine companies by country (US\$ millions)



Source: Savills Research using PitchBook

# Go to market

## Foundations



### Short-term Q3 2023

### Mid-term Q4 2023

### Mid-term Q4 2024

### 2025



- Proof of concept with pilot House of Lab Science in Hombrechtikon with tenants on site purchasing HLS services & attending HLS events
- Community platform and first campaign about it are launched



Milestone 31.12.22

- Opening of 2<sup>nd</sup> location on Siegfried campus in Zofingen
- Opening of 3<sup>rd</sup> location in Basel
- More than **80** members on community platform



Agencies, Google ads

- Lab Science Academy goes live
- Closure of financing round
- More than **600** members on community platform
- Entrepreneurs Fund is launched



Agencies, Google ads

- Project development work in Ticino
- Opening of The HLS vil-lage @Hombrechtikon (10K sqm)
- More than **2'000** members on community platform



Agencies, Google ads

- Opening of HLS @The Valley Kemptthal
- Prepare opening of HLS in Germany, Austria, France for 2025
- Launch of European Lab Science Champions League of Startups



Partner network

House of Lab Science growth and internationalization

# Roadmap

🚩 Incorporation of the House of Lab Science AG  
02.06.2021

🚩 Launch of the first House of Lab Science website 11.11.2021

🚩 **2021/22**

🚩 Construction of laboratories, stage 1  
01.09.2021 – 31.03.2022

🚩 Start of laboratory and other services  
01.04.2022

🚩 Launch of the proprietary community platform  
01.08.2022

🚩 **2023/24**

🚩 Opening of 2<sup>nd</sup> House of Lab Science with Siegfried in Zofingen: Q3-2023

🚩 Opening of House of Lab Science in The Valley, Kemptthal: Q1-2025

🚩 Opening of 3<sup>rd</sup> House of Lab Science in Basel: Q3-2023

🚩 Internationalization (Germany, France) & Launch of Europ. Lab Science Champions League of Startups: 2024

# A NEW AND MAGNIFICENT CLIPPER FOR SAN FRANCISCO.

## MERCHANTS' EXPRESS LINE OF CLIPPER SHIPS!

Loading none but First-Class Vessels and Regularly Dispatching the greatest number.

THE SPLENDID NEW OUT-AND-OUT CLIPPER SHIP

## The gold rush revisited in the 21<sup>st</sup> century

### 19<sup>th</sup> century California Gold Rush

**MANY** gold miners in the **RISKY** business of seeking their fortune by discovering gold nuggets

➡ **FEW** make a fortune, many are left with almost nothing

**FEW** suppliers of boots, shovels, sieves, etc. are on site and in the **SAFE** business of equipping the gold diggers

➡ **MANY** of those few get rich



### Today's gold fever and its profiteers

**MANY** life sciences startups in the **RISKY** business of bringing their disruptive products to a billion-dollar market

➡ **FEW** make a fortune, many are left with almost nothing

**FEW** facilitators and lab suppliers on the market and in the **SAFE** business of supporting the life sciences startups

➡ **MANY** of those few get rich



# CALIFORNIA

HENRY BARBER, Commander, AT PIER 13 EAST RIVER.

This elegant Clipper Ship was built expressly for this trade by Samuel Hall, Esq., of East Boston, the builder of the celebrated Clippers "SURPRISE," "GAMECOCK," "JOHN GILPIN," and others. **She will fully equal them in speed!** Unusually prompt dispatch and a very quick trip may be relied upon. Engagements should be completed at once.

House  
OF LAB SCIENCE  
San Francisco,  
KITTLE & CO.

RANDOLPH M. COOLEY, 88 Wall Street, Tontine Building.

NESBITT & CO., PRINTERS.

HOUSE OF LAB SCIENCE



[www.houseoflabscience.world](http://www.houseoflabscience.world)

+41 76 406 68 33

[info@houseoflabscience.world](mailto:info@houseoflabscience.world)

Garstligweg 8,  
8634 Hombrechtikon