toolpoint®
FOR LIFE SCIENCE

Annual Report 2010

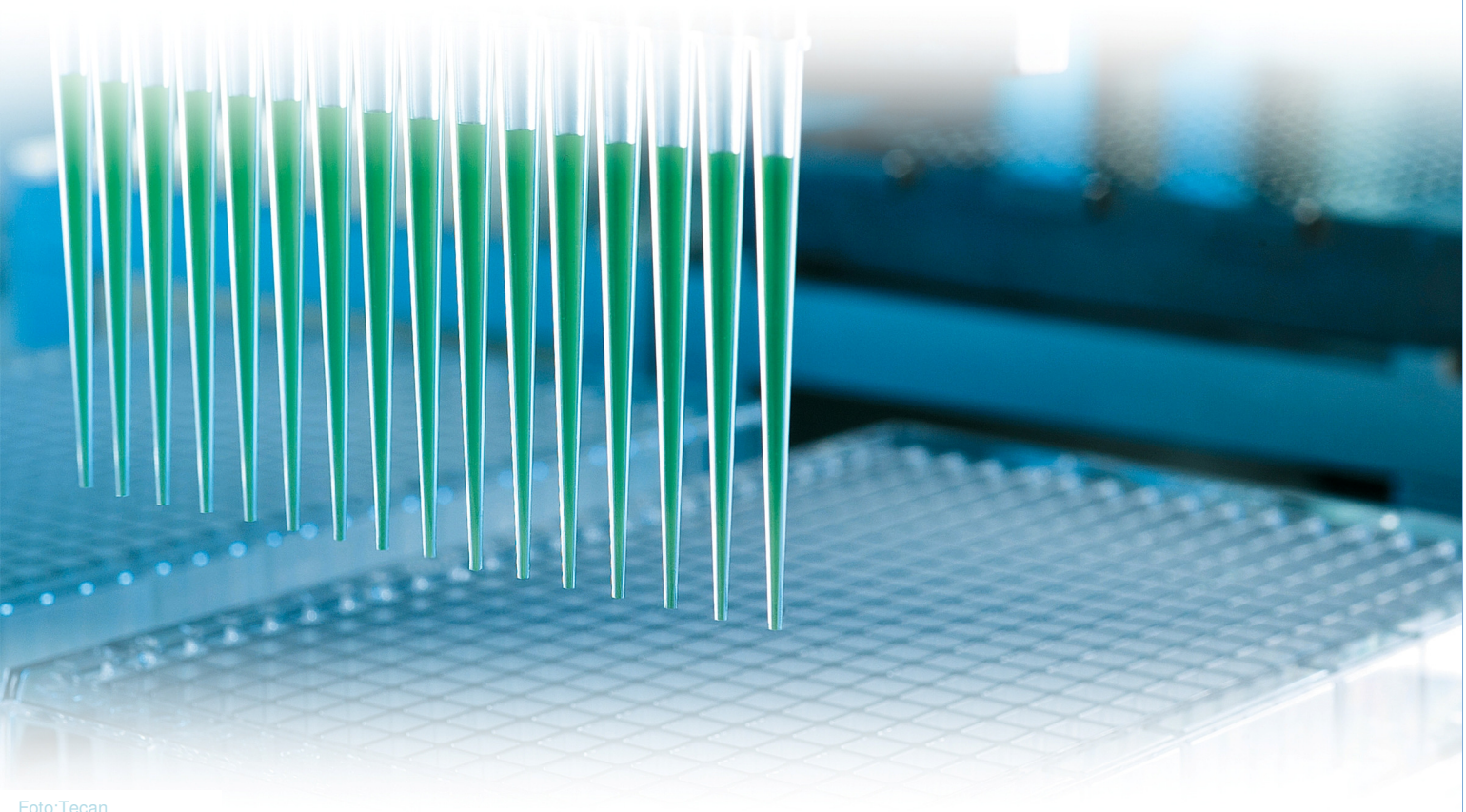


Foto:Tecan

generating benefits.

Annual Report 2010
Contents

1. Successful leadership transfer to Hans Noser

With grand engagement, perseverance, and entrepreneurial flair Peter Schleiffer developed Toolpoint from a small project to an efficiently functioning organisation comprising twenty nine industrial companies, and supported by an extensive network. In 2010 Hans Noser succeeded Peter Schleiffer as the Managing Director. Peter Schleiffer continues within the organisation as the Vice-President of Toolpoint and the President of SiLA.

The CEO Event in Mai 2010 offered an ideal opportunity for an official transfer of leadership to Hans Noser, who during the past six months became intimately acquainted with the internal issues and procedures. He was, therefore, well prepared to take over his new responsibility with confidence, and to secure continuity of trust within the organisation and externally.

In recognition of his extraordinary achievements, Peter Schleiffer was duly honoured in accompaniment of his favourite music. His contributions cannot be overestimated, in that he laid solid foundations and beyond for a successful development of this unique initiative. It is the objective, henceforth to make this enterprise continue and thrive.
Already in the course of last year, with active contribution of Hans Noser, a strategy under the headline “Strengthen the Toolpoint Strategy” was developed, and formally adopted by the Delegates’ Conference.

With this strategy the following objectives are to be reached:

- Strengthening international presence
- Expanding Toolpoint’s membership within well defined target segments
- Intensifying collaborative ties to academia
- Raising effectiveness

Hans Noser, with his long entrepreneurial career, and his extensive network, brings in an ideal set of competencies to continue growth of Toolpoint successfully. In addition to his business expertise, Hans Noser is also excellently connected in the academic environment; this through his on going part time teaching engagements at the tertiary education institutes.

This Annual Report gives an account of Toolpoint’s activities for the business year 2009/2010 (October 2009 to December 2010). For the coming business year 2011 there will be congruency between the business and the calendar year. To optimise organisational structures, Toolpoint Management GmbH was set up with an objective to avoid tax risks, and to reduce membership contributions in the medium run.
The Life Science Instruments industry will continue to be our growth branch, while confronting diverse global challenges. Our strength remains in consolidated action in areas of limited competitive pressure. The vertical organisational structure of our network contributes greatly to the increased speed of technology transfer.
Let us jointly recognise and exploit available opportunities! With an ongoing engagement and enthusiasm of our members, partners, supporters, of our entire network, and notably, of the Toolpoint employees, we can look into the future with confidence and optimism.

We look forward to continuous, exciting, and mutually beneficial cooperation.

The Toolpoint team

The vertical cluster: value added chain

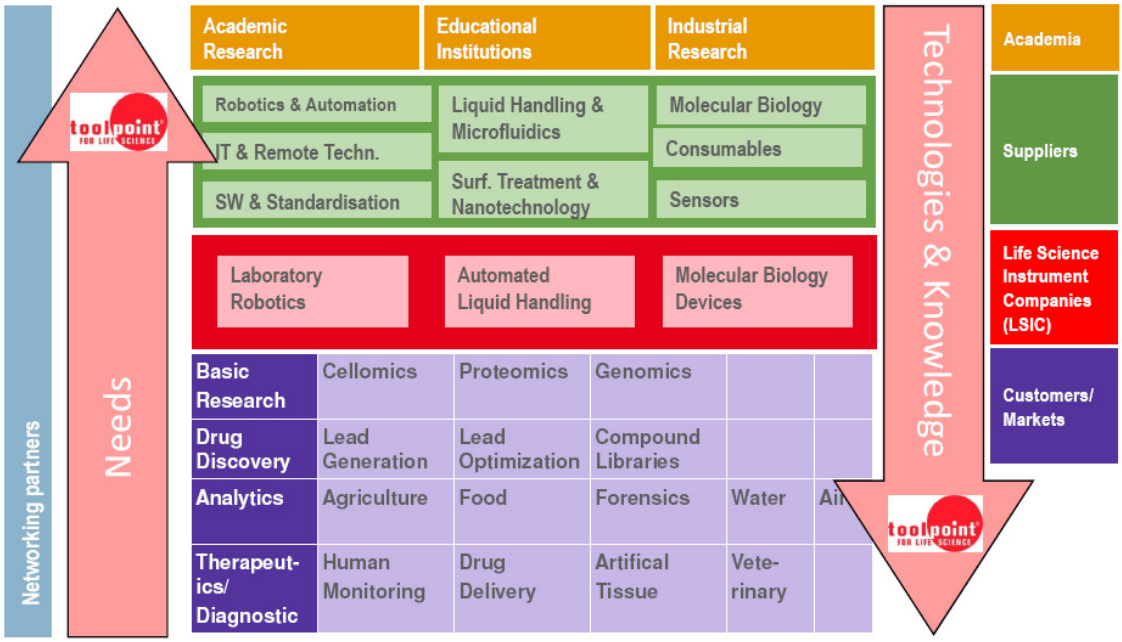


Fig. The value added chain shows the target markets of Toolpoint (lilac), the technological core competencies of the suppliers (green), the knowledge and technology carriers such as universities (yellow-brown), as well as the core competencies of Toolpoint core members (red). Toolpoint is engaged in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

Members of the Toolpoint Cluster (2010)

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
Ditabis, Pforzheim
Gilson, Paris
Hamilton, Bonaduz
Integra Biosciences, Zizers
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)
Invetech, Zürich
Molecular Machines and Industrie, Glattbrugg
Sensirion, Stäfa
Surface Contacts, (D)
Xavo, (D) und Basel
Weidmann Plastics, Rapperswil

Start-Ups:
Dynetix, Landquart
Xeronics, Hombrechtikon
Insphero, Zürich
SuSoS, Volketswil

Fig. Toolpoint members

2. Highlights of the Year

New Partner in Toolpoint Network:

AON, an international insurance service provider, joined the Toolpoint cluster as a new partner. As a consequence, the Toolpoint members will be able to benefit from an access to an international information platform in the field of risk and insurance management. To AON, on the other hand, there will be new opportunities for joint projects.

MipTec: Enhanced (reinforced) Presence of Toolpoint and SiLA

This year Toolpoint manifested its presence at the MipTec with a separate and a bigger stand. Also SiLA marked its presence with additional stands and info boxes on the booth of other members of the cluster. Luncheon hosted by SiLA took place this year in bigger premises, adequate for the growing number of participants.

Service Level Agreement and Apprenticeship Promotion Program extended

After three successful years resulting in initiation of 35 new apprenticeships, and of a variety of practical training jobs, eight communities in the county of Meilen decided to extend for the next three years their service level agreement with Toolpoint.

New Members

During this business year Toolpoint expanded its membership by three new companies: Insphero, Zurich, MMI, Glattbrugg, and Invetech, Zurich.

Successful leadership transfer

Succession of Peter Schleiffer by Hans Noser was carried out without obstacles, and was accompanied by requisite organisational adaptations.

SiLA's persistent growth

Project SiLA (Standardisation in Lab Automation), which was initiated in response to a demand of a single customer, showed this year further expansion. SiLA is managed independently by Toolpoint under a Management Agreement, and has its own webpage (www.sila.coop).

3. Information about Application Fields

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

- 3.1 Innovation and Technology
- 3.2 Networking
- 3.3 Education/Human Resources
- 3.4 Commercial Collaboration
- 3.5 Policy Action
- 3.6 Cluster Expansion

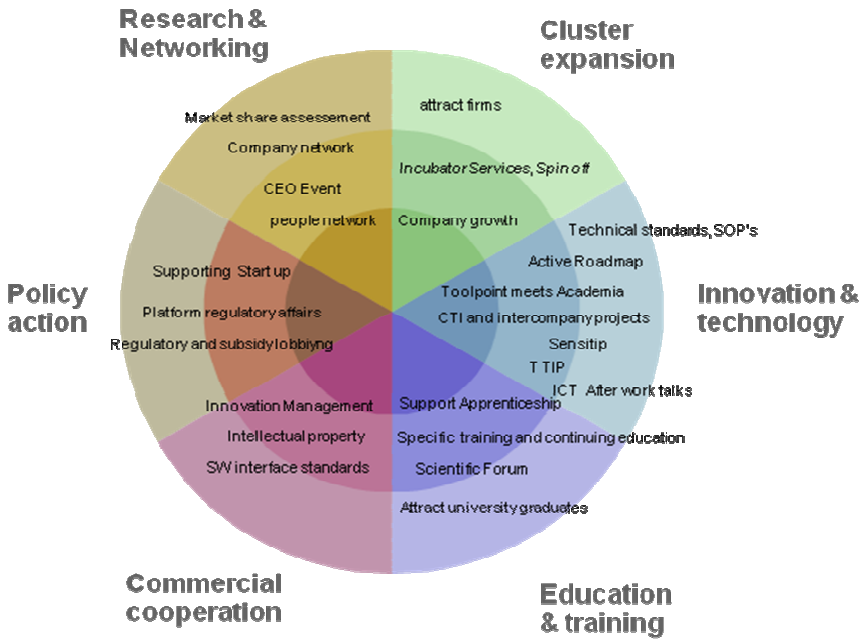


Fig. The Cluster Initiative Target Board by Örjan Sölvell, Göran Lindqvist and Christian Ketels, extract of The Cluster Initiative Greenbook (Stockholm: Bromma tryck AB, 2003) 27, supplemented by Toolpoint specific services.

3.1 Innovation and Technology

Our well validated Technology Assessment Process provided also this year basis for the members' needs survey. The process relying on 1:1 feedback dialogues, conducted twice a year, aims at identification of common interests through gathering information about individual companies' future requirements. The results of the feedback, dialogues, and the findings of the Roadmap Team (RMT) were then consolidated and presented to the member companies without name references. In the course of this procedure, common denominators emerge providing indication as to whether there is sufficient support for new projects and proposals in the members' community. To secure necessary expertise, academic institutions and external companies were involved in the assessment process. Based on this, potentially interested member companies decide whether they wish to participate in the evaluation stage, to determine precise goals, as well as the budget, and finally decide, whether or not to take part in the final project

The process is shown schematically in the diagram below:

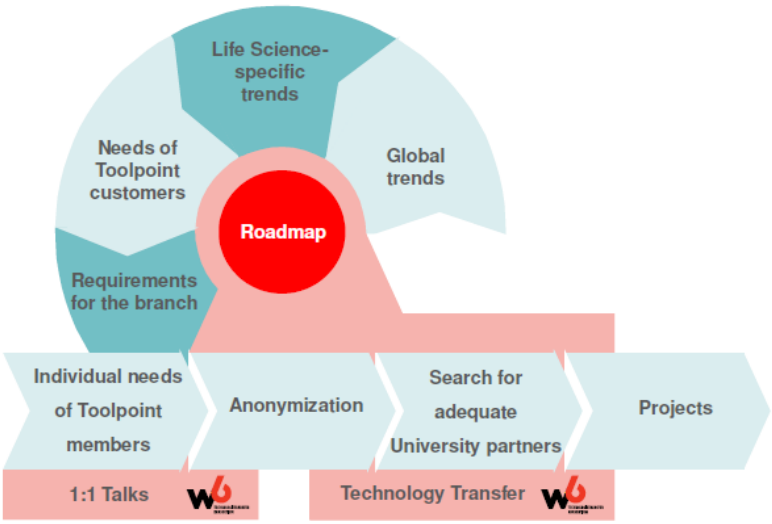


Fig. The Toolpoint Technology Assessment Process

3.1.1 Whoch 6

W^6 (www.whoch6.ch) is a consortium found as an initiative of the Swiss government (BBT und KTI/CTI). Toolpoint is an industry partner in the division Life Sciences / MedTech / Biology and reports to the w6 coordinator D. Alexakis (www.bridgeplus.ch).
The aim of w6 is to reinforce the Technology Transfer between academia and industry, and to stimulate the existing activities in order to improve the exchange among the network's members. For Toolpoint, the main tasks are performed by the Technology Assessor (Rino Kunz), the most important being assessment and evaluation of the members' needs according to the Toolpoint Process.
Further, activities include organisation of events, eminently, the Scientific Forum (see there) and the T-TIP Seminars (T-TIP stands for Toolpoint's Technology Information Platform).

While Toolpoint concentrates on technology transfer and on guiding and stimulating networking between industry and academia, its aims perfectly coincide with those of the consortium w6, thus allowing for this part of Toolpoint's activities to be funded by w6.

3.1.2 Roadmap Team

The Roadmap Team (RMT) constitutes Toolpoint's "Think Tank". On one hand, it updates periodically the existing Toolpoint Roadmap, on the other, it considers topics that are of a more general nature or, in terms of time horizon, would transgress subjects discussed at other expert committee meetings. The RMT, thus, acts as an "early warning system" to identify alerts on market-relevant technological and other developments. The information so gathered serves as the basis for recommendations and decision taking in the life science domain.

The following topics are among those regularly checked for trends and their relevance for the future developments in life sciences:

- Health markets (growth markets, maintaining and improving health, new distribution channels, for example health centres).
- The integral view (human being within 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 also 3.1.4.
- POC (Point of Care: individualisation, personalisation, and decentralisation).

In 2010 The Roadmap Team has initiated a study: "New diagnostics markets – chances for growth and distribution channels in future customer- and patient-oriented diagnostics markets" (See also 3.1.3)

During its one and only meeting last year, the decision was taken to conduct the first Roadmap Check-up in 2011. Within Toolpoint a desire was expressed for combining the Check-up with a vision of the future developments in a form to be yet defined. Further, the "Toolpoint meets Academia" initiative received strong support and impulse to advance..

The Roadmap proved to be a valuable instrument in that numerous trend-topics, initiated since 2006, resulted in actual projects, be it Toolpoint's own creation - SiLA, tangible technological projects, or presentations on scientific forums.

3.1.3 Current Technology projects (overview)

Regular projects:

Sensitip

Objective: Online pipetting control with flow measuring system in tip. Check of feasibility, performance and technical solutions as well as of IP situation.

Project Leader: Agathe Koller-Hodac, ILT/HSR, akoller@hsr.ch

Participants: 7 from industry and 2 from academia

Info: CTI Project started in Jan 2009

The Project Sensitip was successfully completed in spring 2010. To prevent competition from patenting, the results of this project were published and a poster relating to the subject presented at the MipTec see Fig.

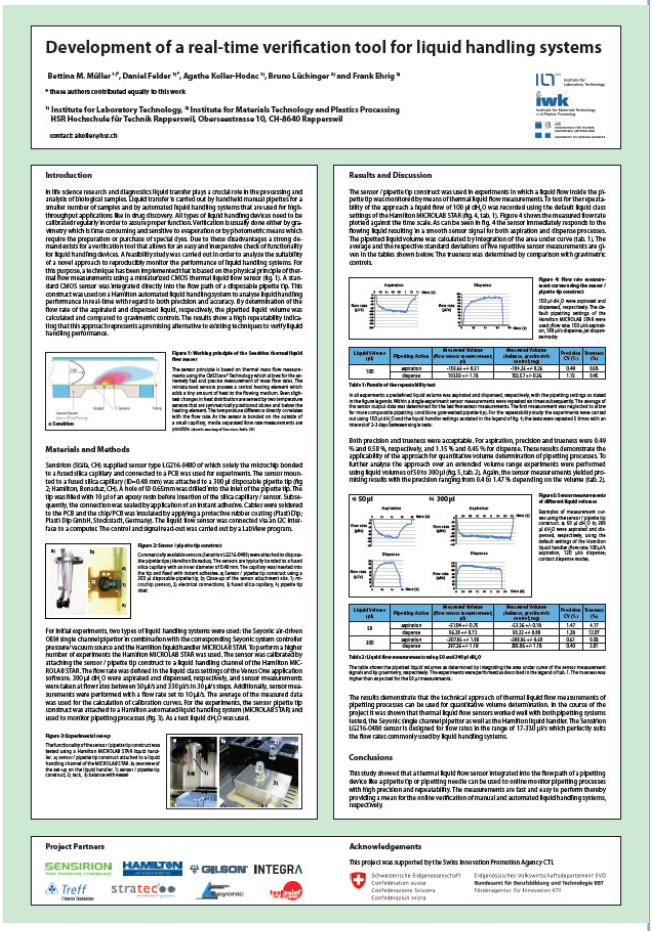


Fig. Poster that was exposed at MipTec 2010

ReDefine trends in diagnostics

Objective: Current information on trends and opportunities in future diagnostic markets: "New diagnostics markets – perspectives for growth and distribution channels in future customer- and patient-oriented diagnostics markets" (a study recommended by the Toolpoint Roadmap Team).

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

Participants: Eight - representing industry, one – academia, and W.I.R.E, the Think Tank of Bank Sarasin, www.healthhorizons.ch

The results of the research published by the end of 2009 under the heading: RE/DEFINING DIAGNOSTICS, demonstrate how diagnostic innovations leaving laboratories revolutionise medicine. The study covers for one, such subjects as diagnostic drivers, application fields, technology platforms, as well as tangible application possibilities, and eminent trends in regard to market suitability; for another, possible risks, and the issues of social and political acceptance. The results were presented and handed at the end to the participants.

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

SILA

Objective: SiLA is the global initiative to standardise software interfaces in the field of life science research instrumentation. Instigated by the pharmaceutical industry´s demand for flexible laboratory automation, the initiative is now supported by major device and software suppliers worldwide.

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

Participants: Thirty industrial companies,

Info: more details under 3.1.5

Finished projects:

Carry over

The KTI-project "Carry over" initiated by Toolpoint in 2007, was completed in February 2009. In 2010 an extensive article, "Development of Standard Test Procedures for Quantifying Carry-Over from Fixed Pipetting Tips in Liquid Handling Systems", was published in the renown Journal of Association for Laboratory Automation (JALA). The results also appeared in two publications in JALA online: "Reduction of Carry Over in liquid-handling systems with a decontamination step integrated in the washing procedure", and „Developments of Standard Test Procedures for quantifying Carry Over from fixed pipetting tips in liquid-handling systems".

Fig.: Excerpts from the article in JALA: also available on the Homepage under: Press.

3.1.4 Further Activities:

IVD Industry Connectivity Consortium (IICC):

Since August 2008 Toolpoint continues to be a "General Interest Member" of IICC.

SystemsX.ch

The SystemsX day took place at ETH Zürich on October 19th 2009.

The SystemsX SME Day on October 19, 2009, turned to be a great success. Roughly fourty participants attended lectures and discussions. We received numerous positive feedbacks. The lunch meeting offered great opportunities for striking new contacts.

A survey conducted by Toolpoint before the meeting, confirmed prior claim put forward by the Roadmap – Toolpoint's off-shot established in 2006, about Systems Biology's paramount importance for the future of Life Sciences. According to the survey the following topics ranked as the top three :

1. Microfluidics
2. Cell-based Assays
3. IT Aspects

These have been also chosen as the main topics for the SME day, and were advanced in corresponding presentations by SystemsX , and by representatives from the industry. Toolpoint's presentations were delivered by the following experts:

Dr. Markus Sprenger-Haussels from QIAGEN GmbH on Innovations in Sample and Assay Technologies.

Dr. Roland Durner, Tecan Schweiz AG on Workflow Automation for Systems Biology Applications.

Detlef Riedel, Xavo AG on Dealing with interdependencies in HTS workflows - Visions beyond SiLA.

Benefits from collaboration between Toolpoint companies and SystemsX:

for the industry: formulating visions, generating valuable inputs towards improvement of measurement- and robotic systems, and developing innovative products for the future.;

for SystemsX/academia: identifying expertise available within the industry, and, henceforth, the potential future partners for joint projects;

and for both: pioneering novel developments related to, or inspired by systems biology and related fields, e.g. synthetic biology.

Competence Centre for Medical Technology (CCMT)

CCMT is a vibrant hub for academic R&D providers and medical technology firms forming partnerships focused on product innovation. Rino Kunz, who concentrates entire information flow about the scope of activities, and disseminates relevant information among the members, acts as a link between Toolpoint and CCMT.

Thanks to the relations with CCMT, Toolpoint came into contact with Rhytech where a T TIP will take place on April 14th 2011. RhyTech Materials World, located in Schaffhausen, is the Technologiepark for material sciences and surface structures.

Toolpoint meets Academia

The concept: Toolpoint meets Academia, was presented to the Delegates' Conference and was there successfully adopted. Toolpoint prioritises focus areas in accordance with members' preference, and invites pertinent expert R&D institutions to present during a number of workshops, their field relevant know how. This allows Toolpoint to gain an overview of area specific expertise offered by every Institute, and to initiate direct contacts. First workshops are anticipated to take place in 2011.

The first Symposium Lab Automation (am ILT in Rapperswil)

Toolpoint, together with ZHAW, Whoch6 und WTT Ost, supports ILT by the organisation of a Symposium for Lab Automation. The event, the first one of this kind, will take place on 31.3.2011.

3.1.5 Standardisation in Lab Automation: SiLA Initiative

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

SiLA rapidly evolved from a project into a not-for-profit corporation under the Swiss law with an independent budget and its own financing members. SiLA is supported by leading device vendors, biopharma corporations, system integrators and by academia. As a result, SiLA will present its own, separate, more comprehensive annual report in addition to the following abstract:

SiLA - the Mission: Enabling sustainable Innovation through Standardisation

Different standards:

- **Device interface standard**
  A well established, commonly accepted standard reduces the implementation and testing effort for integrated systems. The SiLA device interface standard focuses on defining the interface to interconnect any lab equipment to any SiLA enabled control application, based on state of the art network technologies. This allows various devices to be controlled through the SiLA common command set.

  Even before commercial availability in place, the SiLA standard can be already applied to customer tailored projects. Two approaches are feasible: Software wrappers that translate the native device drivers into the SiLA compatible command structure can be implemented without changing the hardware. For a more sophisticated implementation, a hardware element and a specific software component can be used in front of the native hardware interface, to encapsulate the device for full SiLA compatibility.

- **Data interface standard**
  SiLA is currently developing an XML based format to represent data captured with microtiterplate readers, and potentially with other data capturing devices, including high content readers. To avoid duplication of the ongoing endeavours, SiLA maintains continuous information exchange with relevant organisations in the field, and takes their efforts into account.

- **Labware specification standard**
  SiLA has developed an open, XML based, standard parameter set for the specification of labware properties. Its goal is to provide a comprehensive, supplier independent database of labware specifications for automatic access by instrument control software. This will eliminate the need for the user to enter information on labware, such as microtiter plates, or vials. A prototype database has been developed and is being tested.

Organisation:

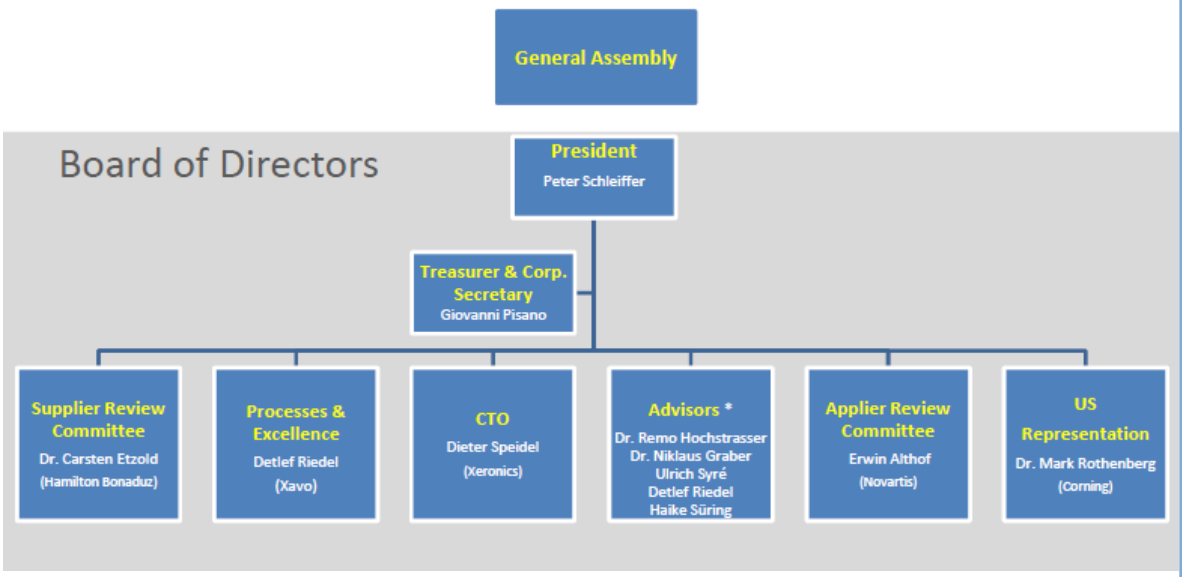


Fig. The SiLA Organisation

Members:

SiLA counts thirty members coming from ten different countries. Details can be seen on www.sila.org. Sixty individuals and six workgroups are active within SiLA.

Core Competencies:

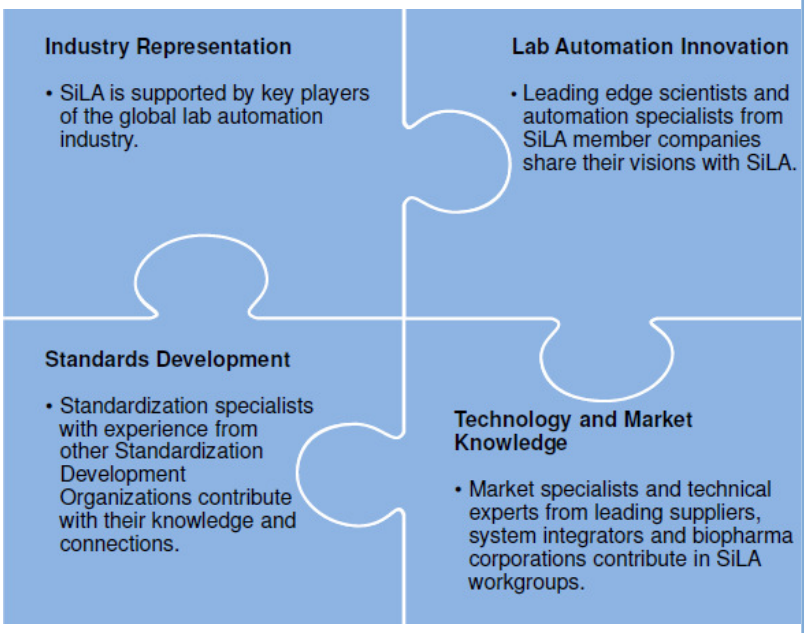


Fig. Core Competencies of SiLA as an interdependent puzzle

General Status:

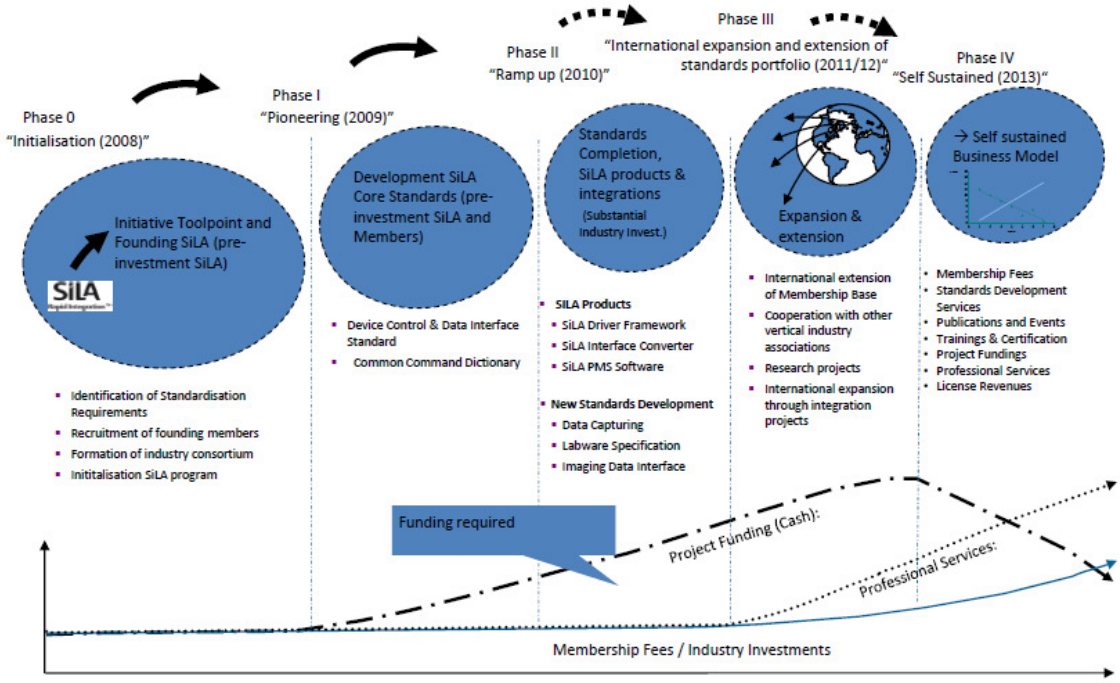


Fig. SiLA History 2008-2010 and Strategic Plan 2011-2013

Meanwhile, SiLA has reached consecutive milestones of its development. As illustrated in the figure below, in 2010 SiLA has gone through phase II: “Ramp up”, and will go into phase III in 2011/2012 enlarging the standard portfolio, and expanding internationally in order to become self sustained in 2013. 2010 was the year of Standard Completion, of development of SiLA products, and integrations making provision of industry funding imperative.

Status of projects:

- SiLA Device Control & Data Interface Standard:
  Standardised interface for communication and control of devices in an integrated system.
  Status: Released and published
- SiLA Common Command Dictionary:
  Standardised common commands for > 35 device classes.
  Status: Proof of concept achieved (partially) Ongoing extension
- SiLA Data Capture Standard
  Standardised data format for microplate reader results incl. meta data.
  Status: In progress, first draft expected 03/2011
- SiLA Imaging Data Interface Standard
  Standardised data interface for imaging systems
  Status: In preparation
- SiLA Labware Specification Standard
  Standardised data format for geometrical and physical properties of labware for direct use in device software.
  Status: In progress, proof of concept achieved
- SiLA Remote Service & Monitoring Interface Standard
  Device identification, remote access & control, File upload / download, Online transmission of process parameters,alarms
  Status: Initiated

Further activities in 2010:

Presence at MipTec:
SiLA successfully marked its presence at MipTec (see also under 3.2.2, and hosted the 3rd SiLA Luncheon with a full house.

Presence at ALA in Palm Springs:

SiLA affirmed its standing while sharing a booth with Xavo Systems and holding a SiLA event with more than thirty participants attending.

Fig. SiLA Luncheon 2010

3.1.6 Toolpoint Technology Information Platform (T-TIP)

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

14 April 2010 at Baumer Group in Frauenfeld on the topic: Sensors in Lab Automation.


30 September 2009 at Weidmann in Bad Ragaz with the main topic: Synthetic Spray Coat Components, their Coding and Identification


3.1.7 Scientific Forums

Toolpoint plans annually several **Scientific Forums** to facilitate networking, information exchange, mutual assistance, and, furthermore to bring up specific topics of vital importance to our field. These include: possible future scenarios, technology trends, actual and prospective applications, and customer needs. Typically, thirty to sixty interested listeners come to the community hall in Hombrechtikon to take active part in discussions. The presentations can be downloaded from the Toolpoint toolnet or will be sent on request. Contact: esther.v.ziegler@toolpoint.ch.

19.10.2009: Dr. med. Dr. phil. II Elsbeth Probst, Unilabs, gave in her presentation: **"Large Laboratories: Modus Operandi and future Challenges"** a glimpse into the endeavours of medical diagnostic laboratories and radiology services.

Among the main concerns were:

- Work as a compromise between safety, speed, reliability, and efficiency
- Examples of frequent problematic daily issues at work.
- Prospects for the future:
    - Personal and organisational structures
    - Technical structures: large, analytical systems, molecular diagnostic, chips, opportunities and limitations
    - IT structures: Enterprise Application Integration

18.1.2010: Stephan Sigrist Head of the Think Tank W.I.R.E. (Web for Interdisciplinary Reseach & Expertise) at Bank Sarasin and Collegium Helveticum - an transdisciplinary research unit of the ETH and University of Zurich gave presentation on: **„Redefine Diagnostics: How the modern diagnostics leaving a Laboratory, revolutionises Medicine**", including contributions from a study commissioned by members of Toolpoint. See also under: 3.1.3.

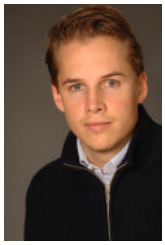
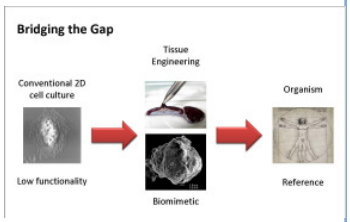


Fig. Auf der Weltkarte der Diagnostik der passiert einiges: Wir erhielten einen Einblick in die Zukunft der Diagnostik und das Zusammenspiel mit den weiteren Marktteilnehmern

17.5.2010: Matthias Krieger (left) and Nicolas Blanc, CSEM, on **Closing the loop – "Situational Awareness" in the Laboratory Automation.** Increased Performance Capability through Sensor Integration - Future Concepts and Technologies.

23.8.2010: Dr. Stephanie Mathes (ZHAW) und Dr. Jens Kelm (Insphero) on the topic of **„Tissue Engineering: Limitations, Opportunities and future Prospects"**



8.11.2010: Christof Zogg, Director Developer & Platform Group at Microsoft Schweiz AG gave a presentation on **„Innovation with Aid of modern Software Technologies“**, demonstrating how Software Tools can be implemented to support novel work processes, and providing insights into „cloud computing“, and its ensuing new opportunities.

3.2. Networking

3.2.1 MipTec Steering Committee

Toolpoint, acting as an agent of vendors, was again represented on the **MipTec Steering Committee** by Peter Schleiffer joined by representatives from Novartis, Roche, Actelion, and other companies. Peter Schleiffer intends to step down from this function at the next MipTec in 2011, and has already introduced his successor, Roland Bucher, CEO of Bucher Biotec.
MipTec is the biggest Drug Discovery Congress in Europe and as such an excellent platform for Toolpoint and SiLA to mark its presence. Toolpoint took again an active role by introducing the new ICT User Group Meetings and by organising the 3rd SiLA Luncheon. The “Awards for Young Scientists”, prizes and event were again sponsored by Toolpoint. Prizes were conferred on the occasion of Peter Schleiffer’s official address.

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

Fig: The winners

Fig. Laudatio by Peter Schleiffer

3.2.2 Participation of Toolpoint & SiLA at MipTec

Toolpoint and SiLA amended by Infoteam, shared a booth at MipTec this year. . CSEM, Baumer, Seyonics und Weidmann took the opportunity to appear on the Toolpoint’s screen with brief presentations, and to provide visitors with printed expositions of their companies, and products.
The following Toolpoint members were also present at MipTec with their separate booth: Hamilton, Insphero, Integra Biosciences, Invetech, Mettler Toledo, Tecan,Weidmann, and Xavo.

Fig. Toolpoint booth with SiLA and Infoteam

3.2.3 CEO Event

The CEO Event took place on May 27th in Zunfthaus zur Meisen in Zürich with a full house. Peter Schleiffer ceded formally the leadership to Hans Noser. For his extraordinary contributions as the CEO and a Clusterpreneur of Toolpoint, Peter Schleiffer was venerated in numerous speaches by his colleagues and friends, and duly honored with his favourite music. Several outstanding guests gave presentations on the following topics:

- Global Macro Environment by Burkhard P. Varnholt, Bank Sarasin
- Impact of the US Healthcare Rreform on the Medtech Industry by Dominik Hotz, PwC
- The Role of Instrument Innovation in IVD by Dr. Dirk H. Ehlers (Roche)
- Furthermore Hans Noser presented the Strategy aims of Toolpoint

3.2.4 Further Networking Activities

Peter Schleiffer took over this year coaching of a diploma thesis at the FHNW. The thesis, “Factors enhancing development of trust - success of SiLA” graded as very good, entails numerous recommendations that will hopefully find its way into the industry. Synergies between universities, research institutes, and industry have a long tradition. With adequately managed cooperation between both spheres of human activity, theoretical findings are bound to find their useful applications.

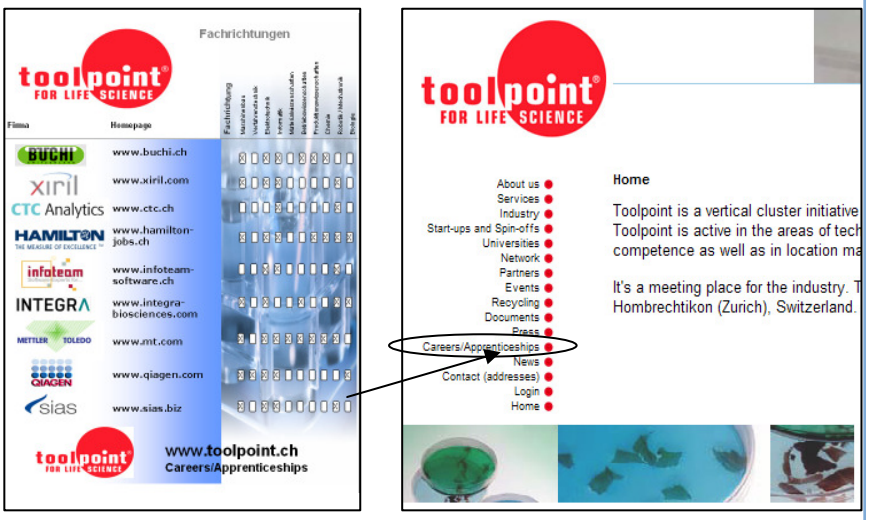
3.3. Education

3.3.1 Human Resources Expert Group

The HR Expert Group met twice this year, in December and June, to discuss urgent issues in the field: efficient recruiting, internship programs, centralisation of student application management, marketing, and experience exchange among HR specialists. The prime topic this year was “recruiting to match the economic growth.

The HR Expert Group organised graduate recruiting events at three different universities, where students were informed about issues pertinent to life science industry by and large, and to the operations of our organisation in particular.

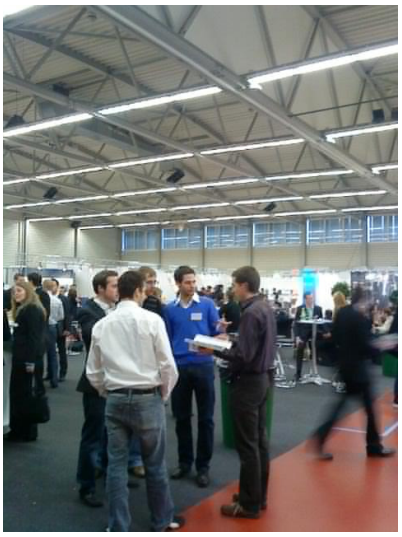
Throughout the year, and especially during exhibitions and events, we discussed employment opportunities with a host of companies. The Toolpoint Flyer distributed among students, contained information about the range of disciplines covered by Toolpoint, as well as a list of Toolpoint companies with their web links.



The Toolpoint representatives Claudia Strahm, and Marc Leuzinger, observed that this year students were able to identify our organisation more readily, and they would approach us with well prepared, targeted questions.

ZHW Graduation Day, Winterthur (17.3.2010)

For the seventh consecutive year, Toolpoint attended the ZHAW graduation day in Winterthur. Fifty two students with specialisation in the fields of relevance for Toolpoint were identified and personally addressed.



HSR Job Market, Rapperswil (28.4.2010)

Also in Rapperswil at the job market, Toolpoint marked its presence for the seventh time, and was represented by our colleagues:, Marc Leuzinger and Claudia Strahm. With classes cancelled, students had ample time to explore a range of possibilities offered by diverse enterprises present at the exhibition.

ETH Polymesse, Zürich (20.4.2010)

For the seventh consecutive year, Toolpoint presented its industry partners at the ETH Zürich Polymesse, the largest recruiting fair in Switzerland. Increased interest on the part of the students, presumably due to the current economic situation, was clearly visible.

This year's representatives at the Toolpoint stand were Marc Leuzinger, Claudia Strahm, both from Toolpoint, and Sandra Schwendener from Hamilton.

3.3.2 Apprenticeship Promotion in the District of Meilen

With the "Apprentice promotion program in the district of Meilen", supported by nine communities: Erlenbach, Herrliberg, Hombrechtikon, Küsnacht, Männedorf, Meilen, Stäfa, Uetikon am See, and Zumikon, Toolpoint looks back at another successful year. Within the last three years, thirty five new apprenticeships, and numerous internship programs were initiated, We continued our presence in the local press with information on the project, in order to raise the necessary awareness in the community, and among potential apprenticeship companies.

Fig. project leader Brigitte Böhi (left) with Beatrice Erne

Toolpoint maintains a separate Website for the apprenticeship promotion program (www.lehrstellenbezirkmeilen.ch), and supports Brigitte Böhi, the project leader, with management and communication services. This year, Beatrice Erne, joined as a team member to render valuable support. Project's apparent success resulted in eight of nine participating communities extending service level agreements with Toolpoint for the following three years.

Fig. Excerpts from articles on "Apprenticeship promotion program", also available at www.lehrstellenbezirkmeilen.ch

3.4 Commercial Collaboration

3.4.1 Intellectual Property Expert Group

The goals of the IP Expert Group:

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

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

- Identification of, and regular update on areas and topics of relevance, e.g. RFID.
- Copy rights in poorly regulated markets, e.g. China.
- Identification of specialist publications on topics of concern to the industry
- Setting coherent rules for remunerating Innovators
- Issuance of a glossary for the Lab Automation Industry.
- Due Diligence
- MSE, patents and new initiatives

3.4.2 WEEE/RoHS Expert Group

Decision was taken to integrate the WEEE/RoHS Expert Group into the Regulatory affairs Expert Group. The waste disposal waste disposal solution, developed by the WEEE/RoHS Expert Group, continues operating as before:
The disposal solution compliant with the requirements, can be implemented throughout Europe by national companies and their customers. The desired disposal is initialised via portal integrated in the Toolpoint home page, whereby the disposal process is initiated and carried out. The resulting costs can be shared by the members to achieve cost-efficient outcomes.

3.5. Policy Action

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

The Regulatory Affairs Expert Group met three times last year at regular intervals to discuss current regulatory issues. Eminent topics that led to actual decisions or to recommendations were: applicability of the new guidelines and regulations pertinent to machinery and products, recent changes regarding GAMP5, implementation of the packaging guidelines, safety and labelling, and UL requirements, applicability of IEC 62304 regarding software for medical instruments, languages in which operating manuals are to be published, and finally, modifications of the RoHS guidelines.

Adjunct to the structured overview table of the standards and guidelines applicable for the member companies, the Expert Group made available a list of experts and representatives within international committees, who can be contacted by members of the Expert Group to aid in clarifying more complex regulatory issues. Also, a comprehensive list of useful links for regulatory information was compiled for use of the member companies.

To allow for insight into the activities of the Regulatory Affairs Expert Group, also to companies not represented, the first meeting of the Group in 2011 shall stand open to all member companies.

3.6 Cluster Expansion

3.6.1 Members

The General Assembly consented to the admission of the following new members, all eminently contributing to increased competence of Toolpoint:

Insphero: www.insphero.com. Start up company active in 3D micro tissue technology for screening of biochemical compounds. Insphero is located in the Technopark in Zürich.

Molecular Machines and Industry: www.molecular-machines.com. Specialising in laser micro manipulation. **MMI** was founded in 1998 by Prof. Dr. Stefan Seeger from the University of Zurich. Today the company operates in three locations: Zurich/Switzerland, Munich/Germany and Haslett/USA.

Ditabis: www.ditabis.de. Ditabis has developed new diagnostic systems for specific illnesses. The technique is based on imaging technology. Ditabis was founded in 1996, and currently employs fifteen specialists. Ditabis' products find applications in the fields of medical research,

pharmaceuticals, IVD, veterinary and food processing. Substantial share of Ditabis' turnover is generated in the OEM market.

Invetech: www.invetech.com.au: Invetech is a contract developer and manufacturer focusing on interdisciplinary engineering, and product development. With its worldwide production facilities and operations, 65% of its turnover is generated in the Life Science industry. Invetech has its head quarters in Australia and also an office in Zürich.

Fig. current location of Toolpoint companies in Switzerland

3.6.2 Partners

Toolpoint committed itself to identifying adequate partners in the area of: risk management, finance, ICT, and market&consulting. Following PwC as market&consulting partner, AON joined Toolpoint recently, after having been unilaterally confirmed at the Delegates' Meeting. With AON's expertise, the Toolpoint members will benefit from an access to an international information network in the field of risk management, and insurance, and re insurance broker services. For AON there will be new opportunities open for joint projects with Toolpoint member companies.

PRICEWATERHOUSECOOPERS AON

4. Organisation

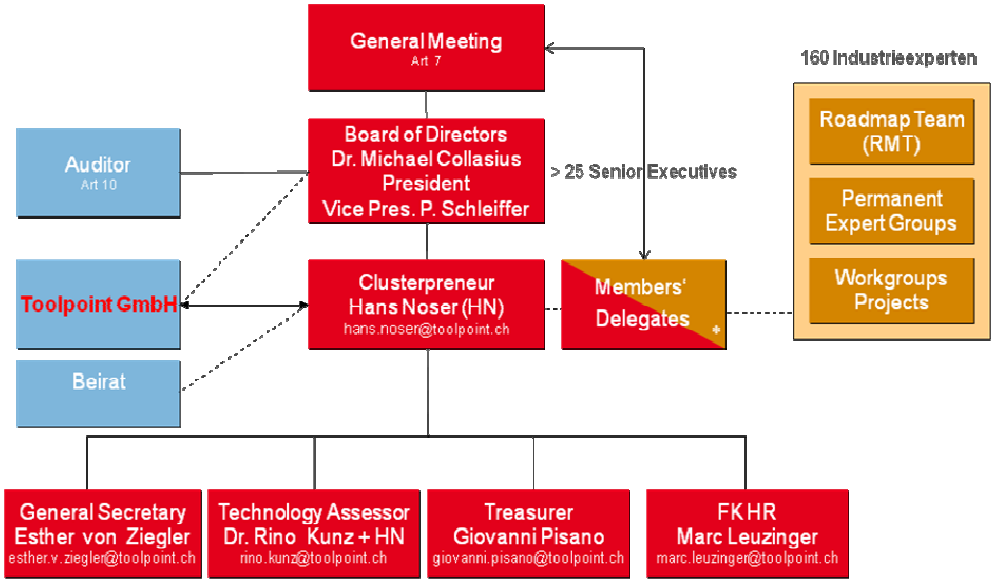
Toolpoint's structures remain very lean, and the organisation continues to be entrepreneurially managed. The most important decision-making body is the Delegates' Conference. The Board of Directors provides the basis for decision making. Members of the board have been elected at the end of 2009 for a term of three years, i.e. until the end of 2012.
The current members of the Board of Directors are:

Michael Collasius (President, previous)
Peter Schleiffer (Vice President, new, previously secretary)
Giovanni Pisano, Treasurer (previous)
Dieter Speidel (previous)
Nic Alexakis (previous)

Advisors: Adrian Stettler (previous, elected until 2012)
Prof. Peter Ryser (previous, elected until 2011)
Dr. Philippe Steiert (previous, elected until 2011)

Auditors: Hansjörg Länzlinger, Tax assessment office, Hombrechtikon (elected until 2010)
Rolf Naef, Zeiss Schweiz, Feldbach (elected until 2010)

The Toolpoint organisation:



The delegates met twice this year for the Delegates' Conference, whereby both Delegates' Conferences (April 2010 and November 2010), were held in combination with the Annual General Meeting. This was due to the fact, that the business year 2008/2009 lasted exceptionally for 15 months (October 1st 2008 until December 31st 2009), in order to bring it in line with the calendar year. The accounting year 2009/2010 lasted 12 months, in accordance with the legal year.

The Delegates' Conference defines programs for the projects and for Expert Groups. It also serves as a platform for information exchange, and for delineating general directions.

5. Financial Report

With the start of the SiLA project, Toolpoint has increased its budget significantly. SiLA itself constitutes an independent profit centre within Toolpoint. As mentioned before, SiLA will publish its own annual report with its separate profit & loss statement. Separate accounts are also kept for the ap-

prentice promotion project. These are summarised in the Toolpoint profit and loss statement as "Contributions apprenticeship promotion" and "Expenditures apprenticeship promotion".
The aim of Toolpoint – as a non profit organisation – is to keep its profit & loss balanced.

	Toolpoint PY 2009	**Toolpoint FY 2010**
Revenues		
Membership contributions	209'208.00	195'860.10
Membership contributions (optionals)	140'493.55	93'222.88
Contributions apprenticeship promotion	57'400.00	54'000.00
Contributions of communities for location marketing	24'000.00	24'000.00
Contribitions Whoch6	81'000.00	80'000.00
Revenue external studies	86'454.50	-
Loss compensation	25'264.00	-
Solidarity contribution	-	49'860.00
Other income	32'950.00	22'950.00
Total revenues	**656'770.05**	**519'892.98**
Expenditures		
Cluster management	65'000.00	95'000.00
Project management	239'532.55	202'065.29
Communication & administration	81'579.95	83'885.40
Apprenticeship promotion	52'338.15	57'619.00
Optional third party cost (projects)	66'898.50	61'718.14
Expenses for external studies	83'633.25	-
Diverse expenses (administration, travelling, representation etc.)	27'733.55	29'325.21
Extraordinary costs / depreciation	9'079.10	16'942.20
Total expenditures	**625'795.05**	**546'555.24**
Result	**30'975.00**	**- 26'662.26**

In spite of solidarity transfers to balance the accounts, a loss deriving from cluster management expenditures was recorded in 2010. Although relatively smooth, the leadership transfer from Peter Schleiffer to Hans Noser produced certain temporary duplications of activities. The slightly reduced optional membership contributions associated with scaled down project activities were reflected respectively in the costs and the revenues.

6. Outlook

It is one of the main tenets of Toolpoint's strategy to consolidate, by means of the organisation's vertical integration, the interests of all players involved in the value added chain: the Toolpoint members, the suppliers, the end users, and the academia. Toolpoint continues to take a strong stand on sustainable growth and improvement of the current working environment.

For the coming year 2011, Toolpoint aspires to expand its membership by new companies, in order to straighten the cluster along the new member segmentation policy. The latter should better reflect the individual needs and expected benefits.

With an objective to play in the future the leading role in Life Science Zurich, Toolpoint wishes to exploit all possible synergies through initiation of joint activities in cooperation with Cluster Organisations. To this end, contacts with international institutions like ALSSA and ELRIG will be affirmed and intensified.

In 2009, in cooperation with PwC commenced market data survey project, Toolpoint **Sample Handling Report,** experienced temporary stagnation due to insufficient interest on the part of the members. After appropriate adjustments and with intention to continuously adapt to users' demands, the report presents itself convincingly, and it certainly offers valuable informational contents. To enhance the project's success, the pool of potential participants will be expanded, also to include users outside of Toolpoint.

Toolpoint continues its involvement in SiLAS's Lab Automation Standards both, in terms of organisational support, and in assisting the project directly. We are confident to be in a position to present in 2011 a "proof of concept" for standardised intercepts in various fields of applications.

We expect that strengthened vertical integration structures shall better facilitate cooperation within our network. As an example, with "Toolpoint meets Academia" initiative, an access to academic research shall become easier; also, tertiary education institutions may choose to become members of Toolpoint, thus enhancing interactions on both sides.

In the future, one on one feedback consultations with our members will continue to set the tone, as shall the identification of common interests and of mutual benefits.

With well defined objectives our organisation will continue on its way to success. We are well aware of obstacles and potential problems, and we possess a solid basis to deal with them. With flexible organisational structures, we are in a position to efficiently adapt to changing conditions.
With joy and confidence we are looking forward to take up this journey together with our members and network partners, to the benefit of the members, Life Science Instruments Industry, the market, research and development and to the progress in medicine.

Hans Noser and the Toolpoint Team

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