

Future Diagnostics Finland

Query 2009 (Jan 7 – Feb 4, 2009)

Dear IVD-experts

- Thank you for your contribution which enabled to conduct this IVD-survey
- The aim was to assess the future directions and needs of the Finnish *in vitro* diagnostics (IVD) industry and to collect foresights for the future development of this sector
- The query, conducted jointly by Association of Finnish Bioindustry (FIB) and Finnish In Vitro Diagnostics Industry Cluster (FIVDIC), was sent to 116 experts in the IVD-field
- Response rate was 41% (47 responders)
- Questions were answered from Jan 7 to Feb 4, 2009
- This interim summary is based on the Z-score analysis of ZEF Evaluation Engine TM
- The query will be separately reviewed and free comments will also be concluded

Statistics

Group	Qty	Answered (%)	Completely answered (%)
Total	116	47 (40.5)	35 (30.2)

A. Expected %-changes in business metrics for IVD-sector in Finland (from 2008 to 2014)

1. Change in IVD-sales volume in the next 5 years (46)
2. Change in the number of IVD-employees in the next 5 years (45)
3. Change in R&D spending (IVD) in the next 5 years (45)

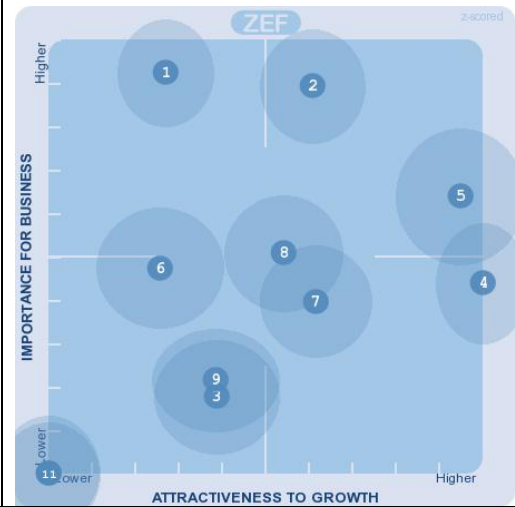
All (46)



B. Future sales growth opportunities (Z-scored)

1. EU (45)
2. North America (44)
3. Central and South America (43)
4. India (43)
5. China (44)
6. Japan (44)
7. Asia (43)
8. Russia (43)
9. Brazil (43)
10. South Africa (43)
11. Middle East (43)

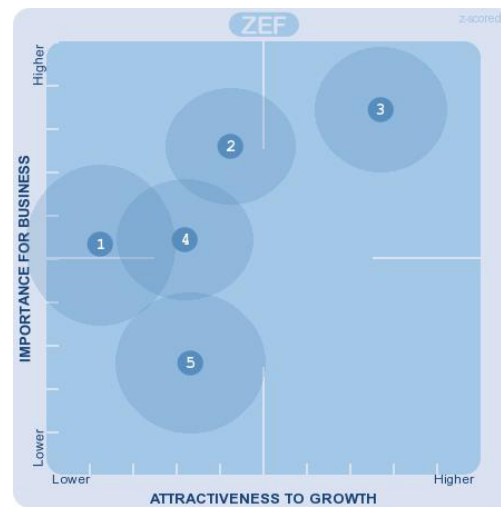
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C. Where do you expect your future product users to be located? (Z-scored)

1. Hospital lab (40)
2. Healthcare centre (40)
3. Doctors office (40)
4. Occupational health (40)
5. Home (40)
6. Other locations which could be important (15)

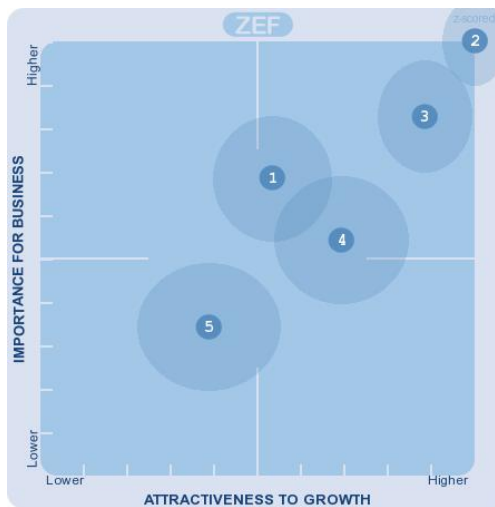
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D. What future product applications do you expect? (Z-scored)

1. Screening (40)
2. To aid diagnosis and treatment follow up (40)
3. Health risk management (40)
4. Individual driven testing (40)
5. Animal/environmental testing (40)
6. What additional areas should be considered (7)

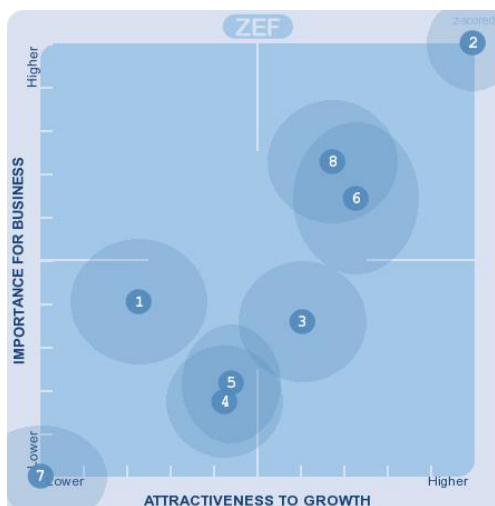
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E. Future biomarker types (Z-scored)

1. Qualitative – yes/no (38)
2. Quantitative (38)
3. Genetic risk (38)
4. Proteomic based (38)
5. Metabolomic based (38)
6. Multiplexed (37)
7. Microbiology – culture (37)
8. Microbiology - probe (37)
9. Other marker groups to be considered (7)

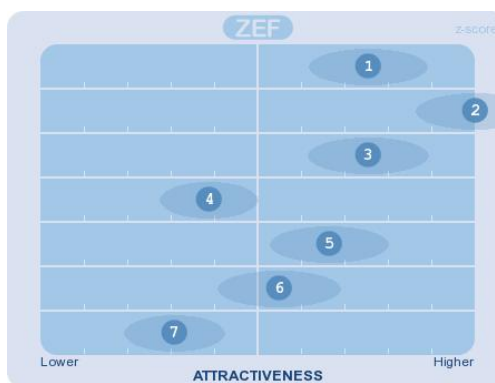
All (38)



F. Future test segments in the Central Lab market (Z-scored)

1. Oncology (37)
2. Cardiovascular and Diabetes risk (37)
3. Metabolic syndrome risk (37)
4. HIV and Hepatitis (37)
5. Antibiotic resistance & susceptibility (37)
6. Asthma and respiratory disease management (37)
7. Osteoporosis (37)
8. Other possible test segments (4)

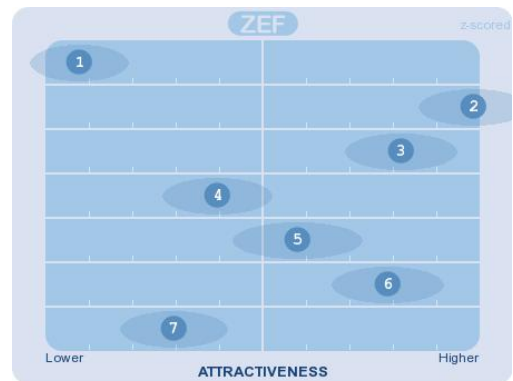
All (37)



G. Future test segments in the Doctors' Office market

1. Oncology (37)
2. Cardiovascular and Diabetes risk (37)
3. Metabolic syndrome risk (37)
4. HIV and Hepatitis (37)
5. Antibiotic resistance & susceptibility (37)
6. Asthma and respiratory disease management (37)
7. Osteoporosis (37)
8. Other possible test segments (7)

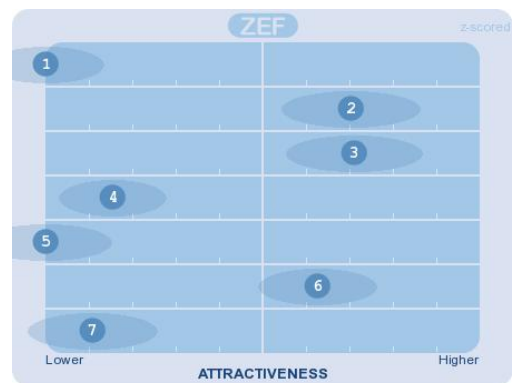
All (37)



H. Future test segments coming from individual driven testing

1. Oncology (37)
2. Cardiovascular and Diabetes risk (36)
3. Metabolic syndrome risk (35)
4. HIV and Hepatitis (35)
5. Antibiotic resistance & susceptibility (35)
6. Asthma and respiratory disease management (35)
7. Osteoporosis (35)
8. Other possible test segments (4)

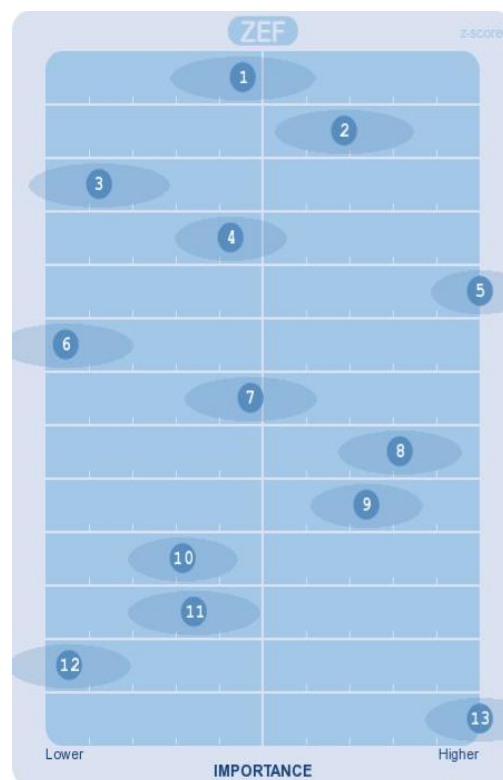
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I. Where will future products come from and what will enable their success? (Z-scored)

1. From established Finnish IVD-companies (36)
2. From start-up companies (36)
3. From academic and government organizations (36)
4. From B2B partnerships (36)
5. From understanding our current customers (36)
6. Finnish government initiatives to promote innovation (36)
7. Improved performance at lower cost as a success enabler (36)
8. Health cost benefit demonstrated as a success enabler (36)
9. Intelligent diagnostic platforms integrated with health data bases as a success enabler (36)
10. Integrated customer support services as a success enabler (36)
11. Individual driven tests focusing on well-being as a success enabler (36)
12. Smart validation methods for multi-marker formats as a success enabler (36)
13. Test linked to specific therapies as a success enabler (36)

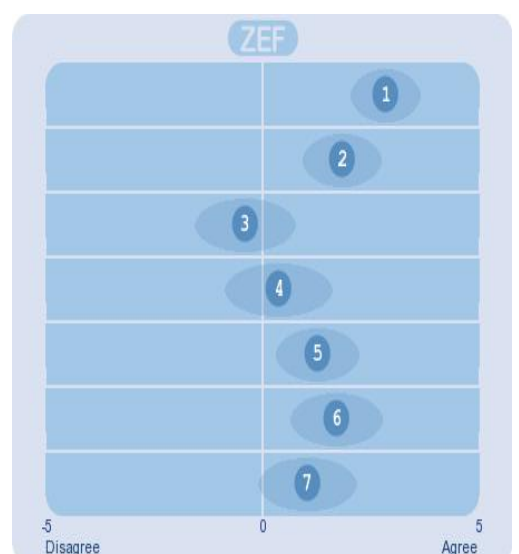
All (36)



J. Innovation: Understanding and realization

1. Innovation is essential to future growth (36)
2. Innovation must deliver a unique product (36)
3. Innovation always create new sales (36)
4. Innovation is anything new which generates new profit (36)
5. Our innovation process is understood by everybody in the company /unit (36)
6. Our innovation actions are followed by the board or equivalent management group (36)
7. Our innovation process has financial related metrics (35)
8. What national actions would you like to see to support innovation? (15)

All (36)



K. Seminar/workshop opportunities

1. Ideas (36)

Indicate which you would be most interested in (select as many as you will)

All (36)

1. Ideas

