

Scottish Enterprise

Life sciences sector strategy



What our client wanted

Scotland's life sciences sector had seen considerable change and creation of the Life Sciences Intermediate Technology Institute (ITI); Scottish Enterprise's Life Sciences Team wanted a major review of the sector in Scotland to inform future strategic decision making.

What Frontline did

We analysed existing research to establish criteria for assessment of Scotland's strengths, followed by reviews of the internal and external markets:

External:

- clarification of segmentation and definitions of the life sciences sector
- analysis of the global and local markets (size, trends, structure and opportunities) in pharmaceuticals, medical devices, diagnostics, biotechnology and associated platform technologies, producing market snapshot reports for each

Internal:

- companies – review of the Scottish company base to map strengths against agreed criteria
- academia – review of Scottish universities to identify world class research and map strengths
- health care – assessment of commercialisation potential from within the NHS

This was corroborated by strategic conversations with international opinion formers in the sector. We identified areas for future focus, presented in a series of innovative "opportunity matrices" that prioritised segments where Scotland's strengths matched areas of international growth.

What difference we made

Our recommendations informed future strategic direction and the focus of the ITI, enabling Scottish Enterprise to prioritise its economic development work in life sciences for maximum impact.

What our client said

"Frontline's thoroughness and ability to condense a vast amount of complex data, provide insightful findings and make practical recommendations was much valued, and evidenced the professional way their team approached the project, and engaged with key decision makers internationally."

Moyna Kennedy, Co-Director of the National Life Sciences team, Scottish Enterprise