

Magyar Biotechnológiai Szövetség
Budapest, 2023. április 21.

Duda Ernő
elnök



Globális finanszírozás

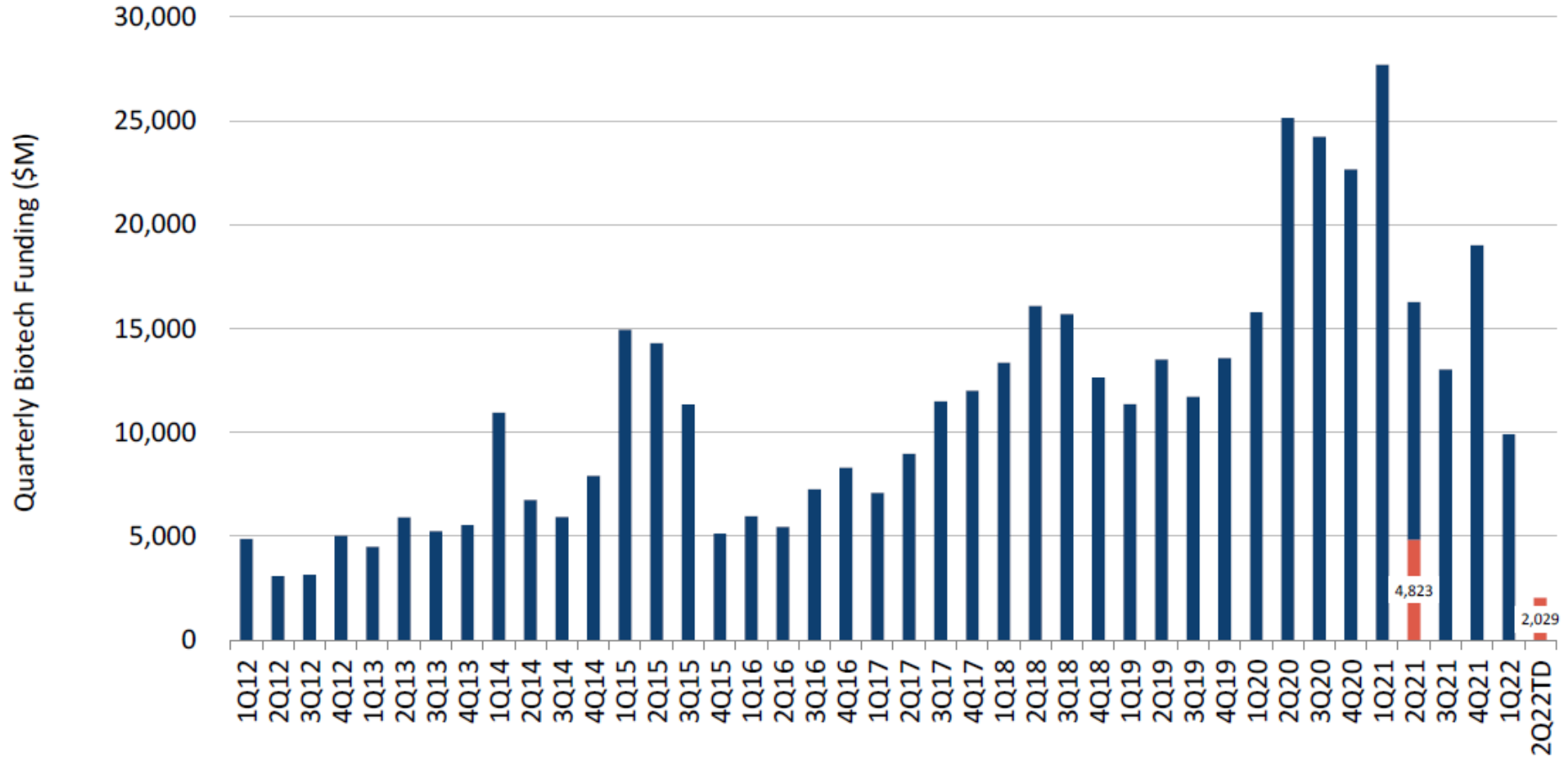
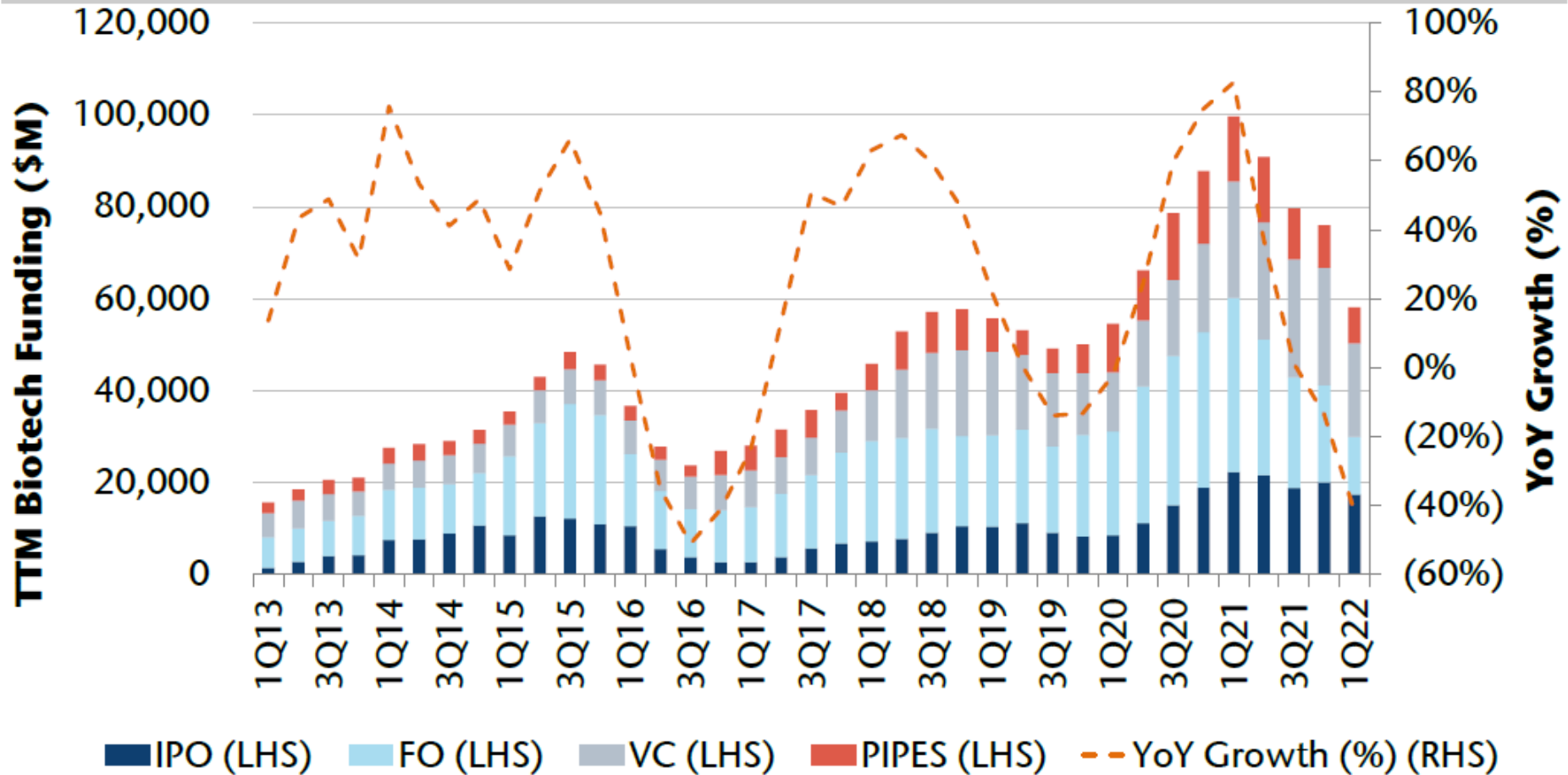
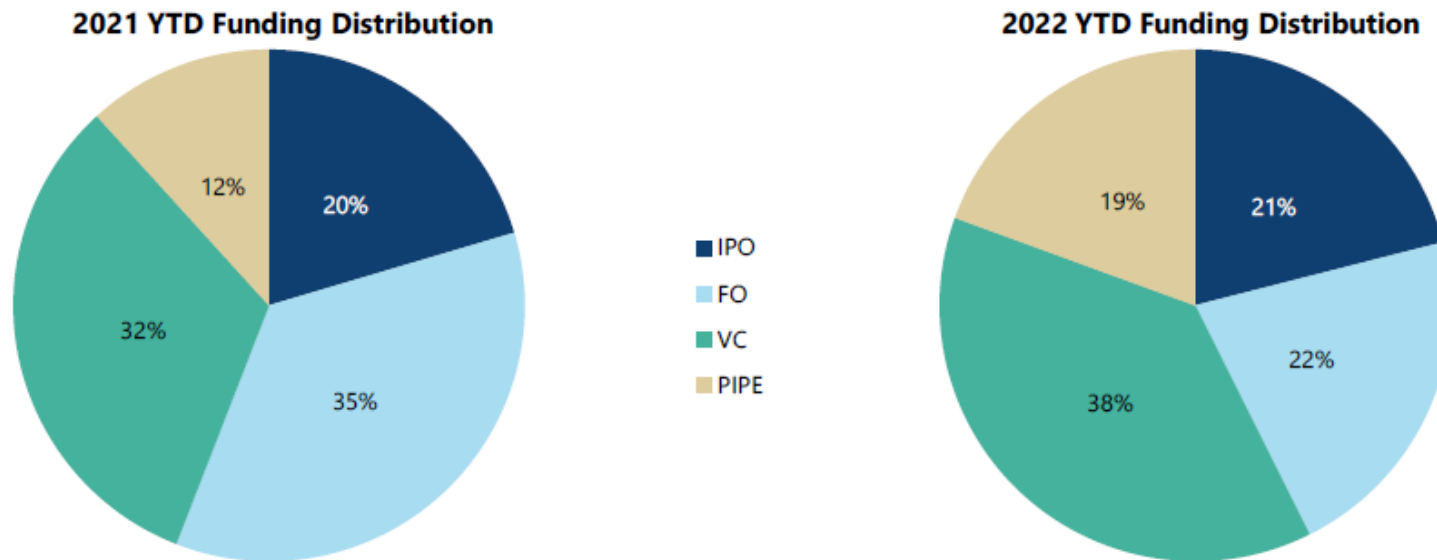


Exhibit 6 - TTM Biotech Funding Has Drifted Lower in Each of the Past 4 Quarters



Source: Factset and Jefferies LLC

Exhibit 5 - Private Transactions Took Leadership Given Volatile Public Markets



Source: JefData Compilation

Biotech IPOs, by year and therapeutic category

Focus	2018	2019	2020	2021	2022	2023
Cancer	20	18	38	49	7	1
Immune diseases	4	4	7	7	1	0
CNS disorders	3	6	6	16	5	0
Rare diseases	10	3	12	12	1	0
Infectious diseases	5	1	4	6	3	0
Other	12	15	12	14	5	3

Source: [BioPharma Dive](#) - Created with [Datawrapper](#)

Biotech IPOs, by year and drug type being developed

Technology	2018	2019	2020	2021	2022	2023
Small molecule	17	26	40	42	13	3
Biologic	14	11	15	30	1	1
Cell or gene therapy	11	4	14	19	4	0
Nucleic acid	2	2	4	1	1	0
Other	10	4	6	12	3	0

Source: [BioPharma Dive](#) - Created with [Datawrapper](#)

Biotech acquisitions, by year and total value paid upfront

Deal value	2018	2019	2020	2021	2022	2023
Up to \$500M	11	10	9	15	25	2
\$500M to \$999M	5	4	7	4	6	2
\$1,000M to \$4,999M	3	9	8	12	8	3
\$5,000M to \$9,999M	3	2	1	2	1	0
\$10,000M or more	2	4	3	2	2	1

Values represent deal count. Acquisitions valued less than \$50 million are not included.

Table: Ned Pagliarulo, Jacob Bell / BioPharma Dive • Source: [BioPharma Dive](#) • Created with [Datawrapper](#)

Biotech acquisitions, by year and percent premium paid

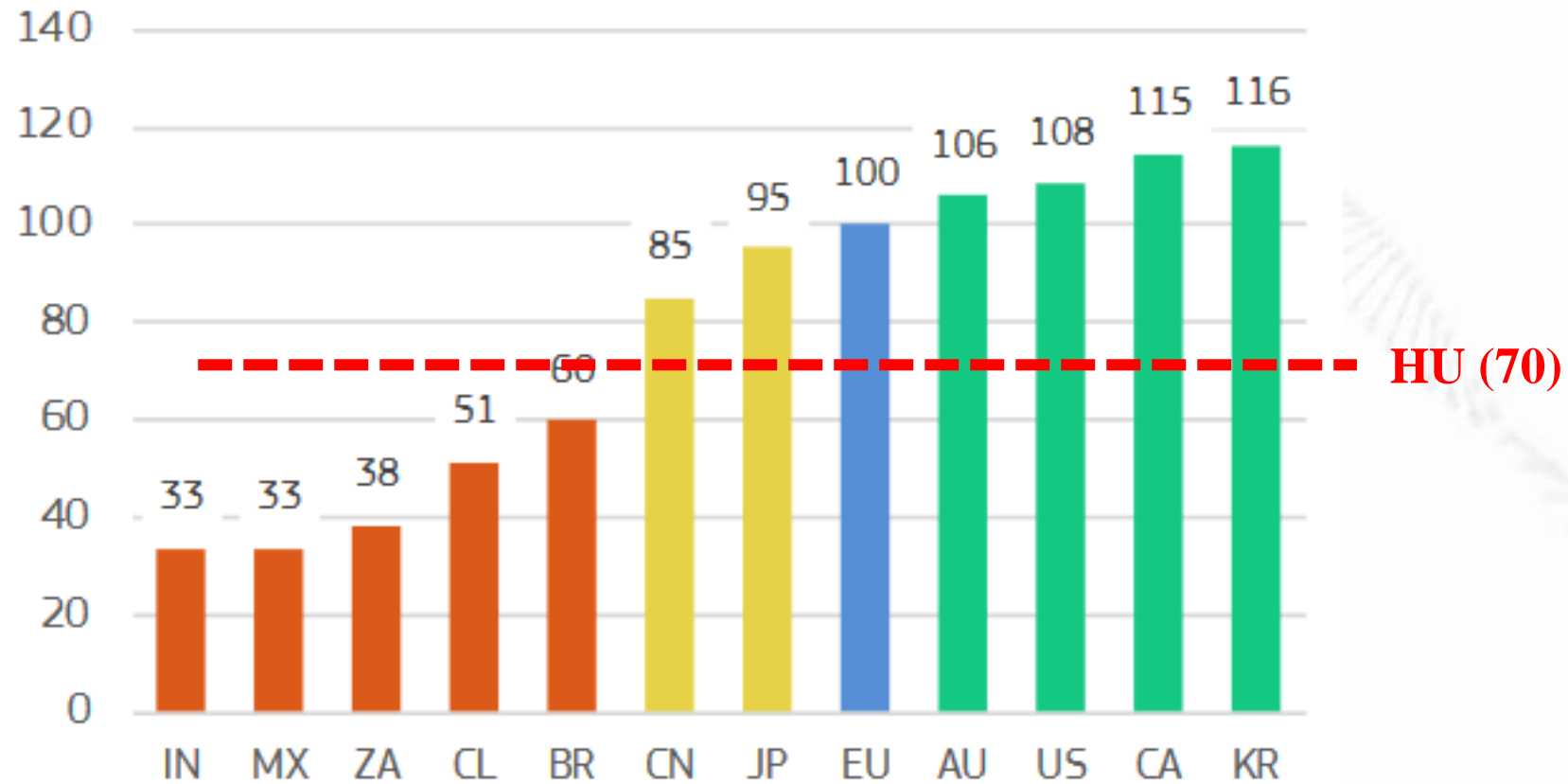
Deal premium	2018	2019	2020	2021	2022	2023
0% to 24%	1	1	2	4	5	1
25% to 49%	2	2	3	2	6	1
50% to 74%	6	6	4	3	4	0
75% to 99%	2	1	3	4	4	1
100% or more	2	6	5	3	7	3

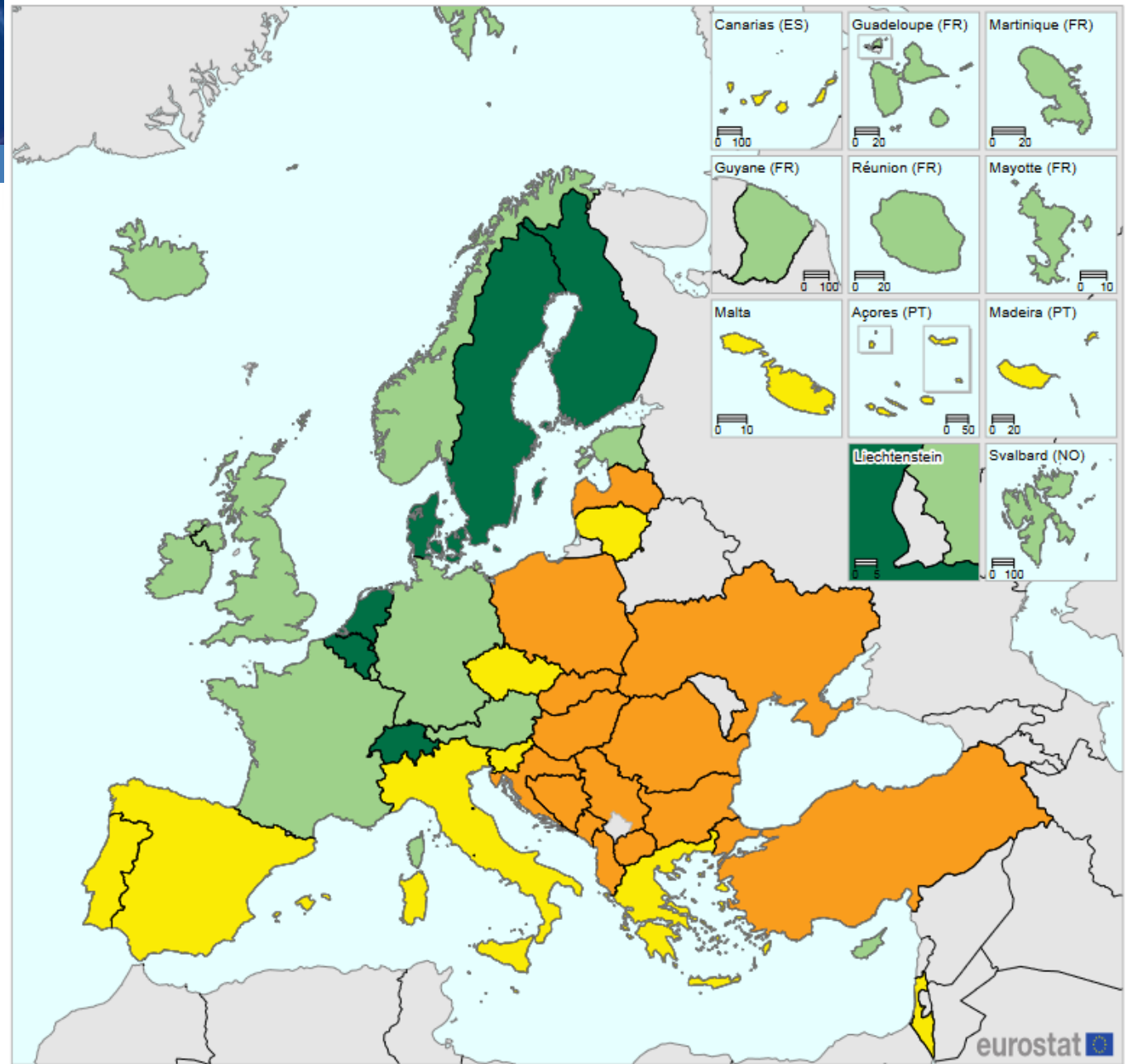
Table: Jacob Bell, Ned Pagliarulo / BioPharma Dive • Source: [BioPharma Dive](#) • Created with [Datawrapper](#)

Globális és hazai (innovációs) teljesítmény



Figure 2: Global performance



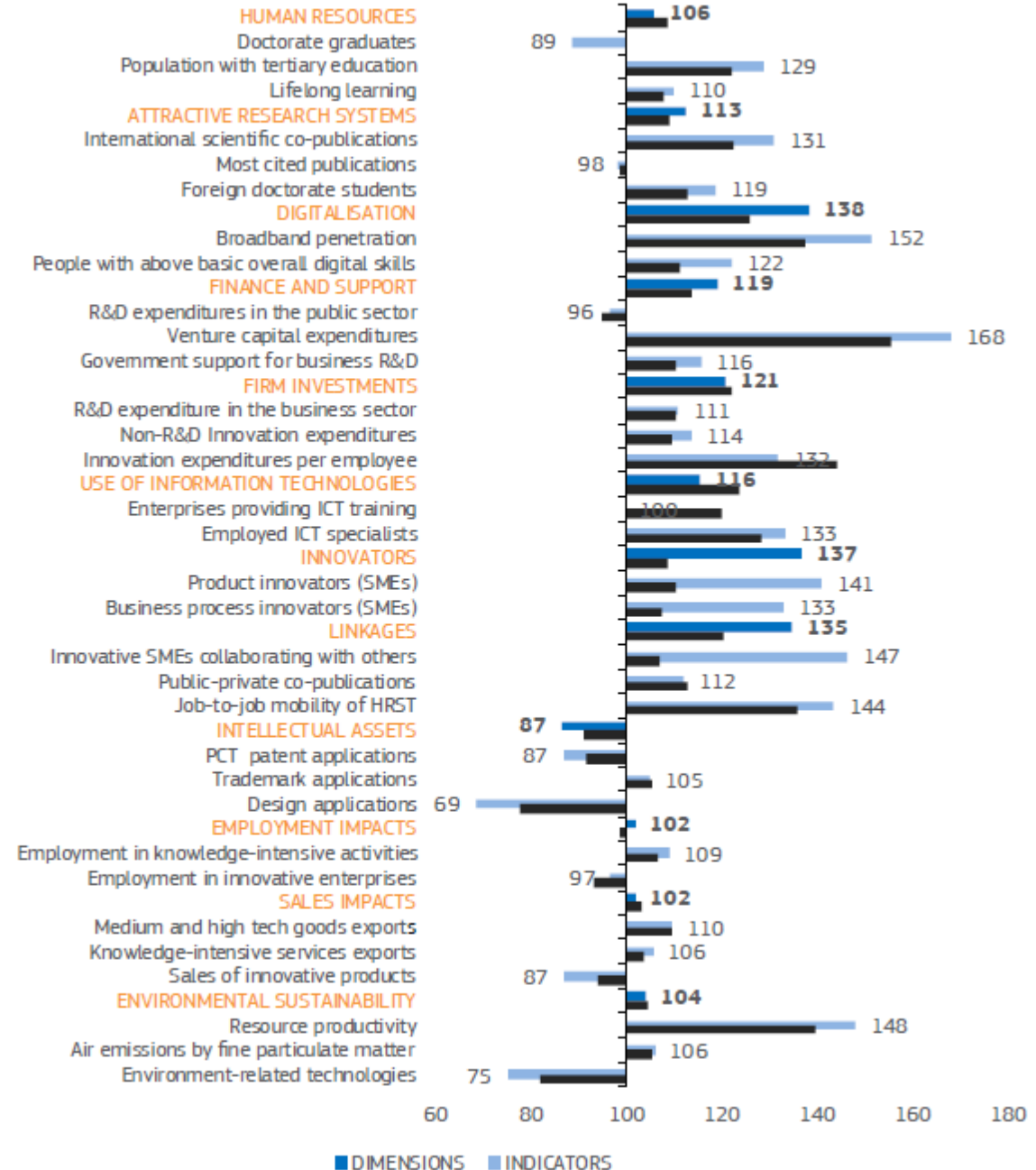


- Innovation Leader
- Strong Innovator
- Moderate Innovator
- Emerging Innovator

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — GISCO, 08/2022

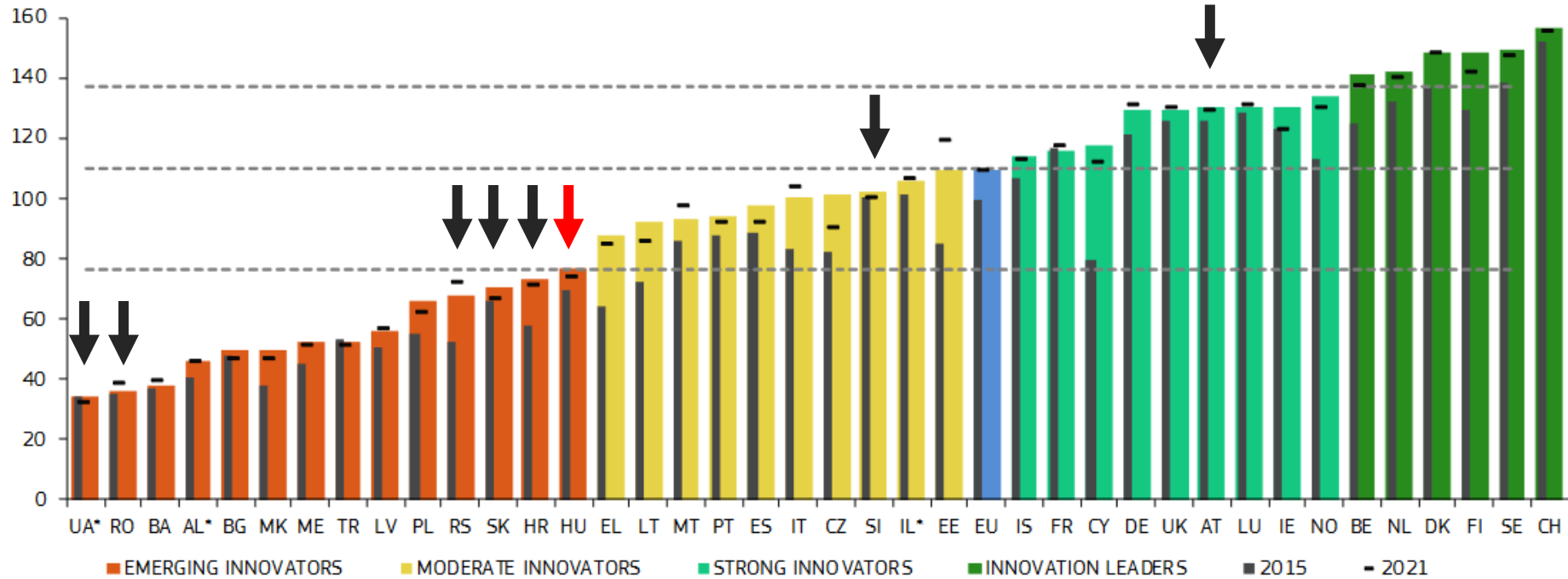
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Figure 5: EU Performance change between 2014 and 2021 by dimension and Indicator



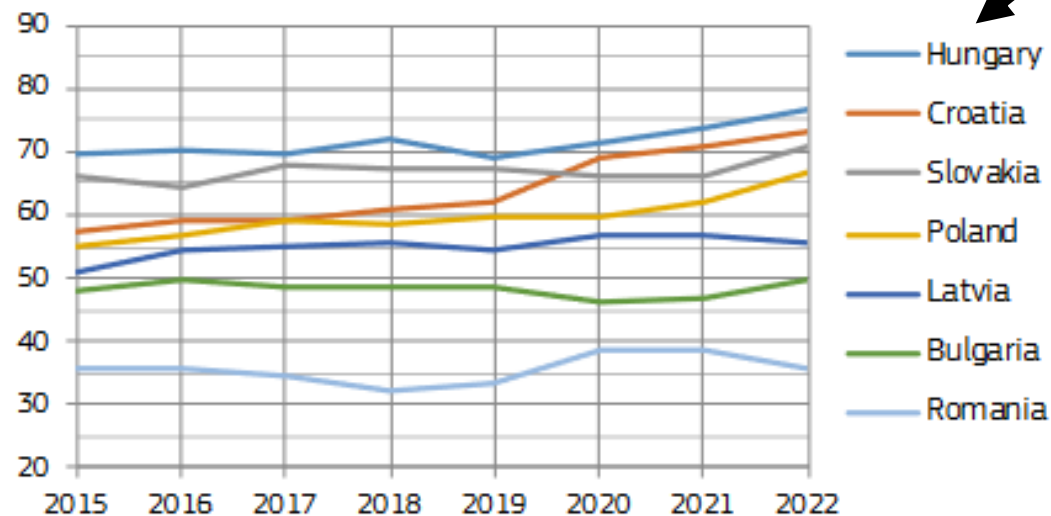
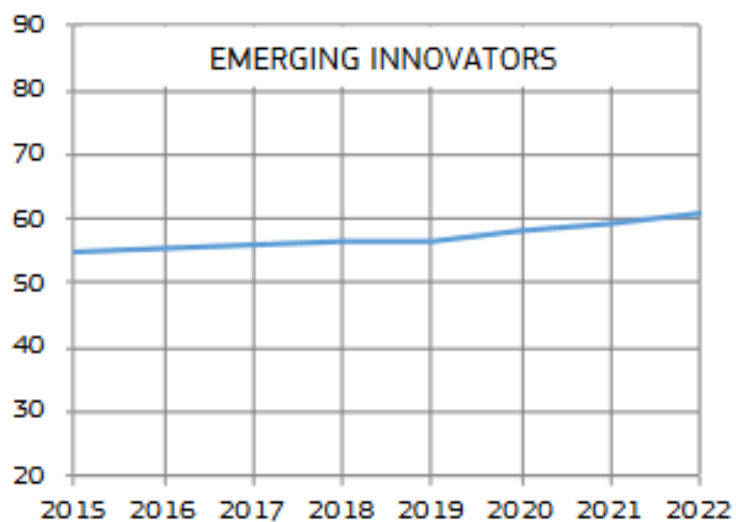
Normalised scores in 2021 (blue coloured bars) and 2020 (black coloured bars) relative to those in 2014 (=100)

Figure 15: Performance of European and neighbouring countries' systems of innovation



Coloured columns show countries' performance in 2022, using the most recent data for 32 indicators, relative to that of the EU in 2015. The horizontal hyphens show performance in 2021, using the next most recent data, relative to that of the EU in 2015. Grey columns show countries' performance in 2015 relative to that of the EU 2015. The dashed lines show the threshold values between the performance groups, where the threshold values of 70%, 100%, and 125% have been adjusted upward to reflect the performance increase of the EU between 2015 and 2022.

Figure 13: Performance Emerging Innovators



Performance is relative to that of the EU in 2015. The graph on the left shows the average performance of the Emerging Innovators, calculated as the unweighted average of the respective Member States.

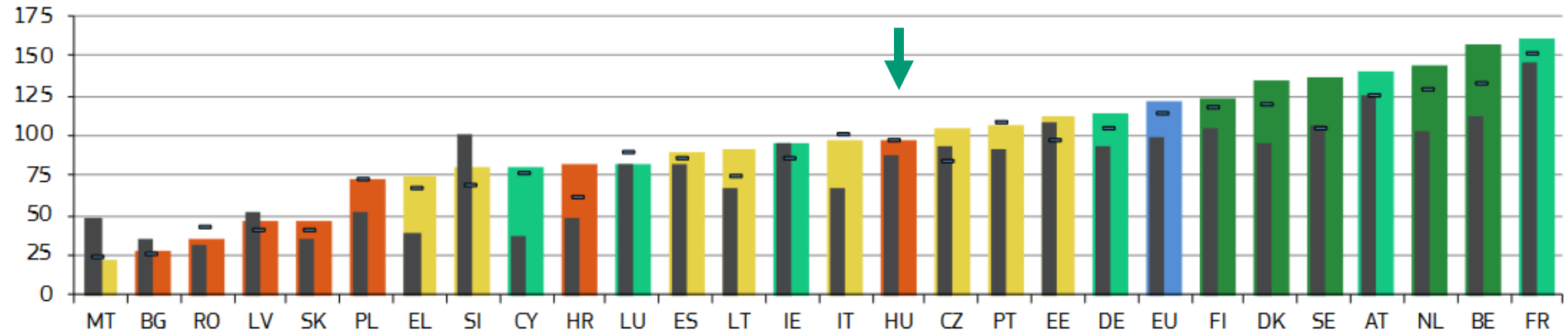


Hungary	Performance relative to EU in 2022	Performance change 2015-2022
SUMMARY INNOVATION INDEX	69.8	7.1
Human resources	45.1	0.0
Doctorate graduates	40.7	0.0
Population with tertiary education	49.2	0.0
Lifelong learning	45.6	0.0
Attractive research systems	78.8	38.3
International scientific co-publications	53.3	26.5
Most cited publications	60.1	5.8
Foreign doctorate students	➔ 146.3	120.4
Digitalisation	71.8	3.2
Broadband penetration	64.1	6.1
People with above basic overall digital skills	81.8	0.0
Finance and support	79.7	9.5
R&D expenditures in the public sector	37.9	3.2
Venture capital expenditures	77.6	33.9
Government support for business R&D	➔ 135.7	-7.2
Firm investments	68.3	-6.3
R&D expenditure in the business sector	79.7	7.0
Non-R&D Innovation expenditures	88.4	-8.0
Innovation expenditures per employee	43.3	-17.2

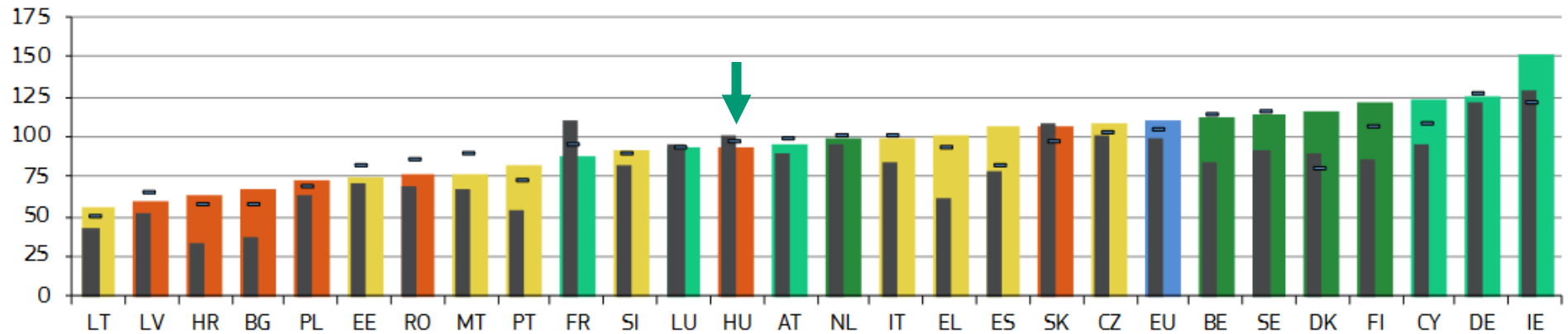
Use of information technologies	73.9	0.0
Enterprises providing ICT training	75.0	0.0
Employed ICT specialists	72.7	0.0
Innovators	49.3	46.7
Product innovators (SMEs)	68.8	49.6
Business process innovators (SMEs)	➔ 32.2	43.5
Linkages	96.1	61.5
Innovative SMEs collaborating with others	82.9	46.5
Public-private co-publications	116.0	70.7
Job-to-job mobility of HRST	97.9	70.6
Intellectual assets	52.3	2.5
PCT patent applications	65.0	-1.6
Trademark applications	67.2	15.2
Design applications	➔ 19.5	-2.3
Employment impacts	59.4	14.0
Employment in knowledge-intensive activities	92.2	0.0
Employment in innovative enterprises	➔ 33.3	26.8
Sales impacts	84.9	-7.6
Medium and high-tech goods exports	➔ 125.7	-1.6
Knowledge-intensive services exports	67.7	14.9
Sales of innovative products	56.6	-41.3
Environmental sustainability	70.4	-19.0
Resource productivity	57.6	-18.1
Air emissions by fine particulate matter	94.7	-4.0
Environment-related technologies	46.9	-37.6



Finance and support

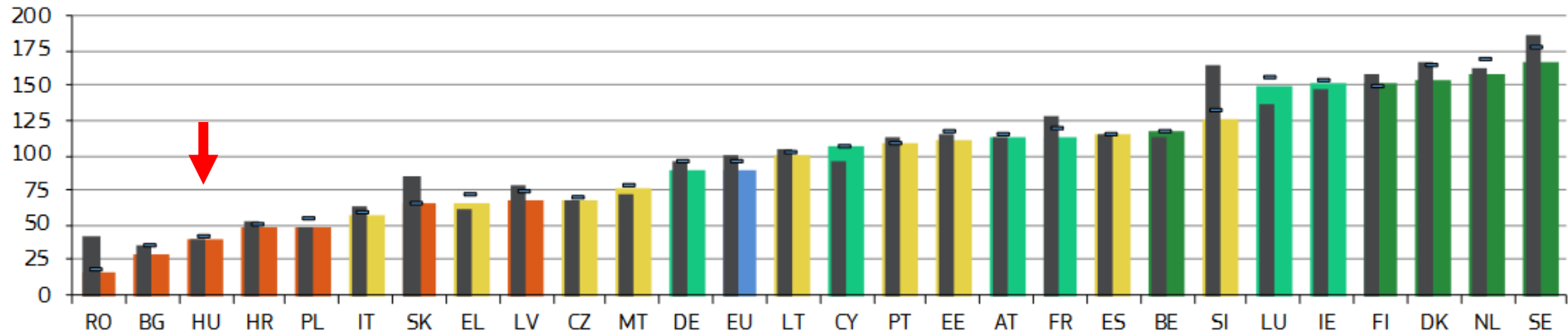


Sales impacts

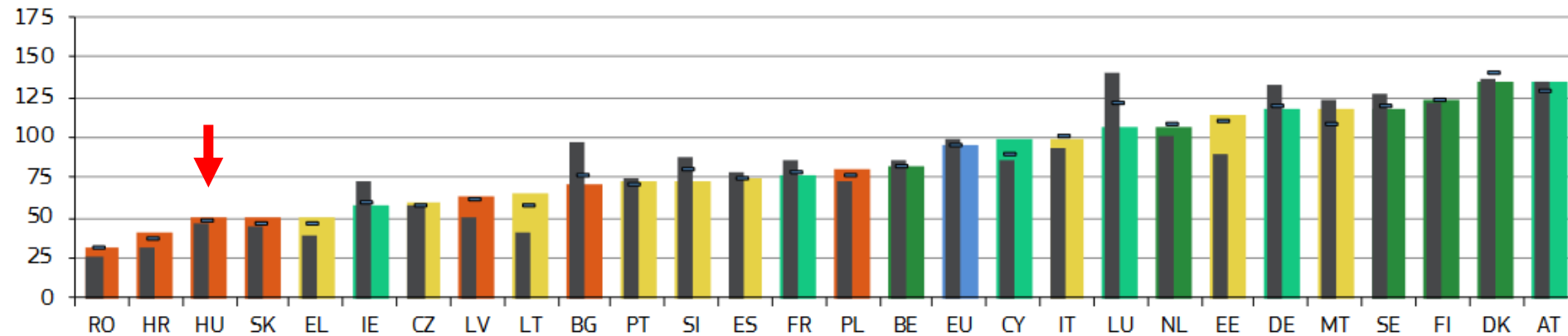




Human resources



Intellectual assets



MBSZ mérleg

Az MBSZ 2022. évi egyszerűsített éves beszámolójának fő sarokszámai

- **Összes bevétel:** 3.320.000 Ft
- **Összes ráfordítás:** 1.392.000 Ft
- **Adózás előtti eredmény:** 1.928.000 Ft
- **Tárgyévi eredmény:** 1.928.000 Ft

- **Befektetett eszközök:** 0.0 Ft
- **Forgóeszközök:** 5.443.000 Ft
- **Eszközök összesen:** 5.443.000 Ft
- **Saját tőke:** 3.443.000 Ft
- **Kötelezettségek:** 2.000.000 Ft
- **Források összesen:** 5.443.000 Ft



Köszönöm figyelmüket!

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