

CARTOGRAPHIE DES MODÈLES D'AFFAIRES

**SOCIÉTÉS UTILISANT L'IA
DANS LA DÉCOUVERTE DE
NOUVEAUX MÉDICAMENTS**

NOVEMBRE 2024

france
biotech

biotech | medtech | e-santé | IA
LES ENTREPRENEURS DE LA HEALTHTECH



Why France Biotech «AI in Drug Discovery» (AIDD) task force?

NEED

- **TechBio companies are still not fully understood** by regulators and investors alike
- Difficulties specifying the sector's boundaries: **“No man's land” between Tech and Bio?**



TASK FORCE

- **Team of BD experts at TechBio and Tech Enabling companies,** across different modalities and therapeutic areas



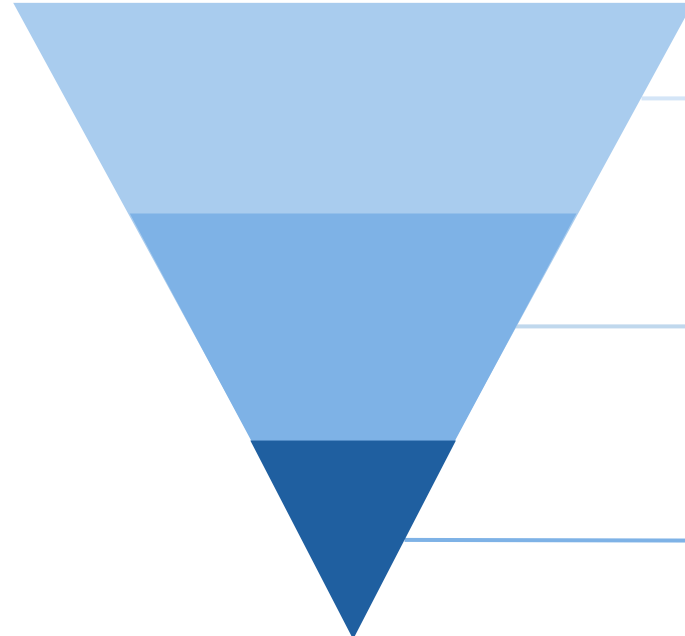
DELIVERABLES

1. **Survey of French AI drug discovery players to map existing business models** based on their own feedbacks
2. **Prepare a White Paper with recommendations to foster the growth of the ecosystem**

Launching the survey: our selection methodology

Inclusion criteria: French **TechBio companies focused on applying AI tools to accelerating drug discovery processes** for themselves or clients / partners

Wide universes of
Tech and Biotech companies



French companies using AI / computational approaches to accelerate R&D in life sciences

Focused on drug discovery process (including pre-clinical and early clinical) excluding companies working on clinical trial processes optimizations

Focused on intellectual services and/or property, excluding products, tools and consumables

22 AI Drug Discovery companies selected

Launching the survey: AI Drug Discovery companies contacted



IQEMIA

Biolevate

BIOOPTIMUS



DeepLife.

EPIGENE LABS

Generare
Bio

iktos^{AI}

INSILIANCE
THE LEADER OF COMPUTATIONAL APPROACHES TO DRUG DISCOVERY



ksilink
patient-based drug discovery

MABSilico
Deeptech Antibody Development

MNEMO
THERAPEUTICS



ONE
BIOSCIENCES

ORAKL
ONCOLOGY

Qubit
PHARMACEUTICALS

ROSETTA OMICS
UNLOCKING THE ROAD TO PRECISION MEDICINE

SCIENTA
Lab

WHITELAB
GENOMICS





Survey results

Final list of respondents to the survey



TECHBIO 2024 FRANCE I.D.

General

-  70% are < 4 years old
-  46% are spin-outs from academia
-  Around 10-25 employees on average
-  1/4 have offices internationally

Business Model, Modalities Explored & Therapeutic Focus

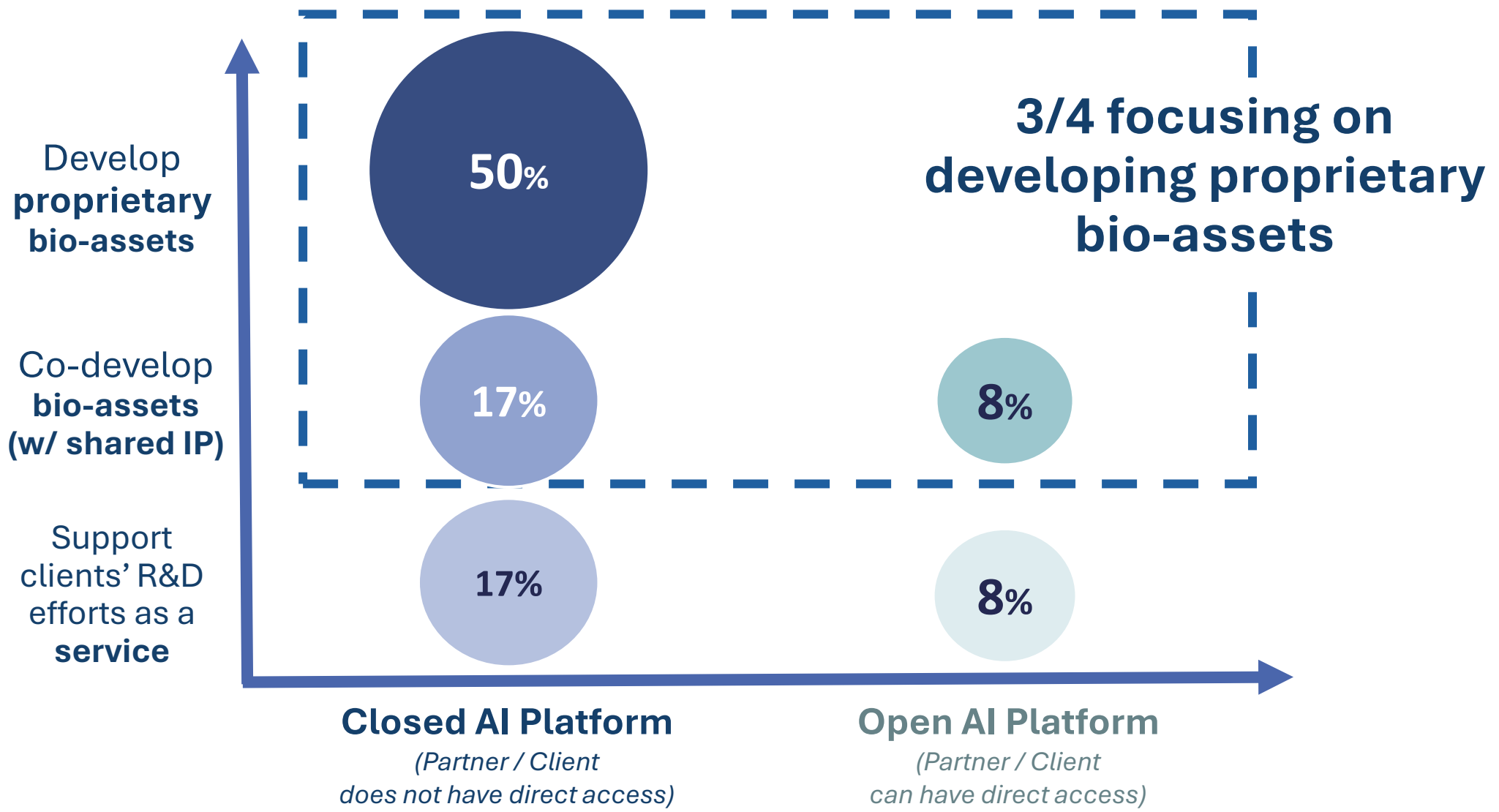
Access to Data

Funding & Partnerships

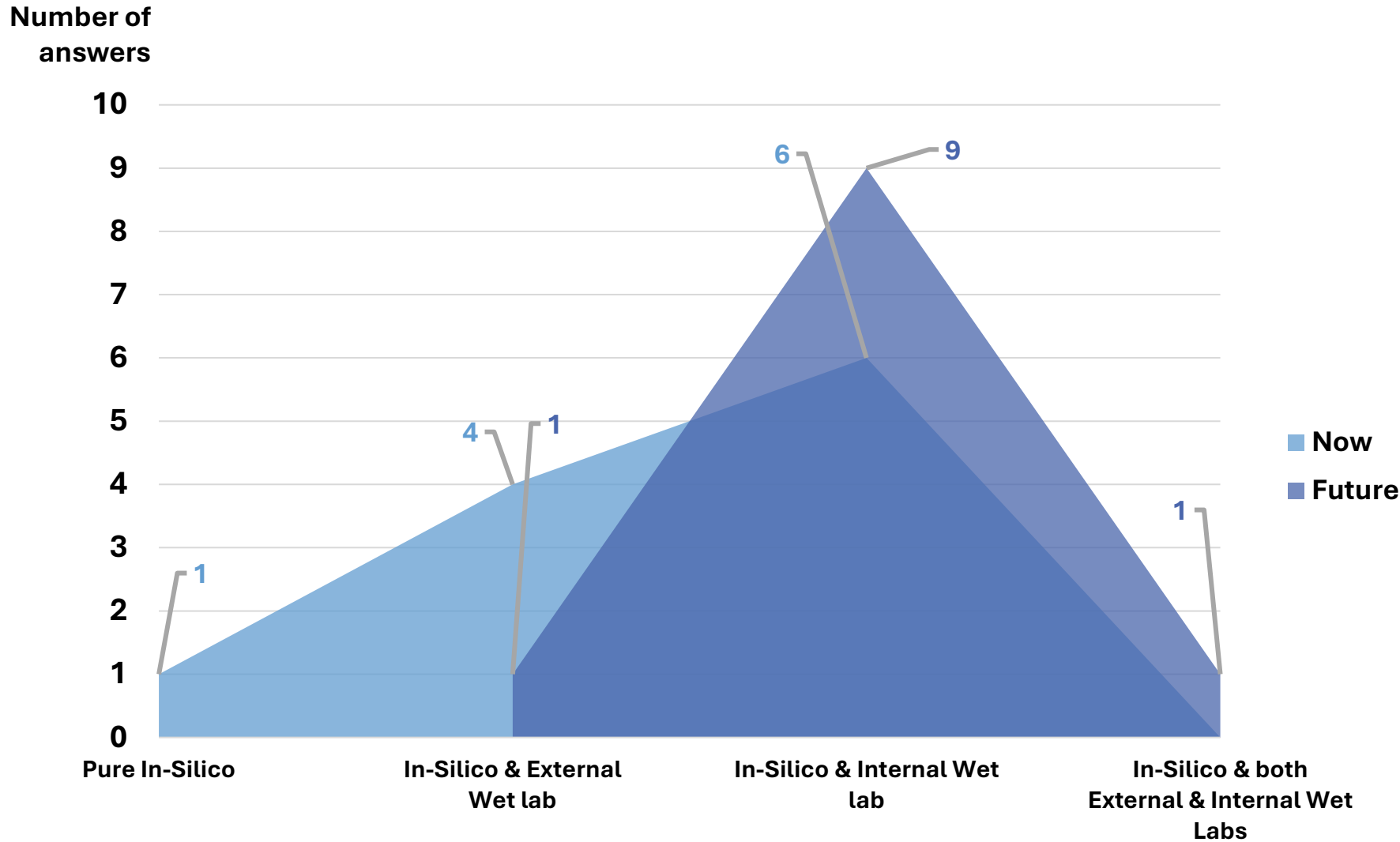
Existing and Future Business Models, Modalities explored & Therapeutic Focus

Majority of French Techbio use their platform to develop proprietary bio-assets

AI platform is used to...

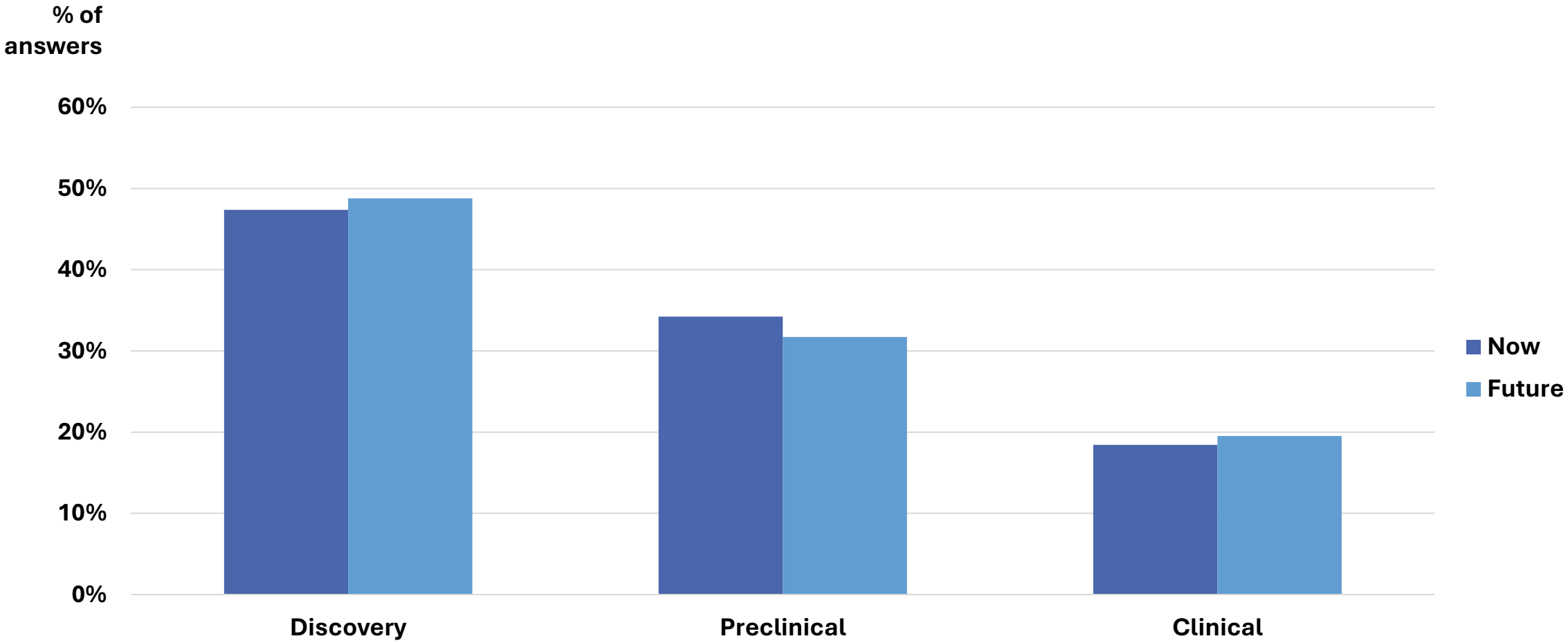


From dry to wet lab: most French TechBio plan to develop in-house capabilities, if not already the case

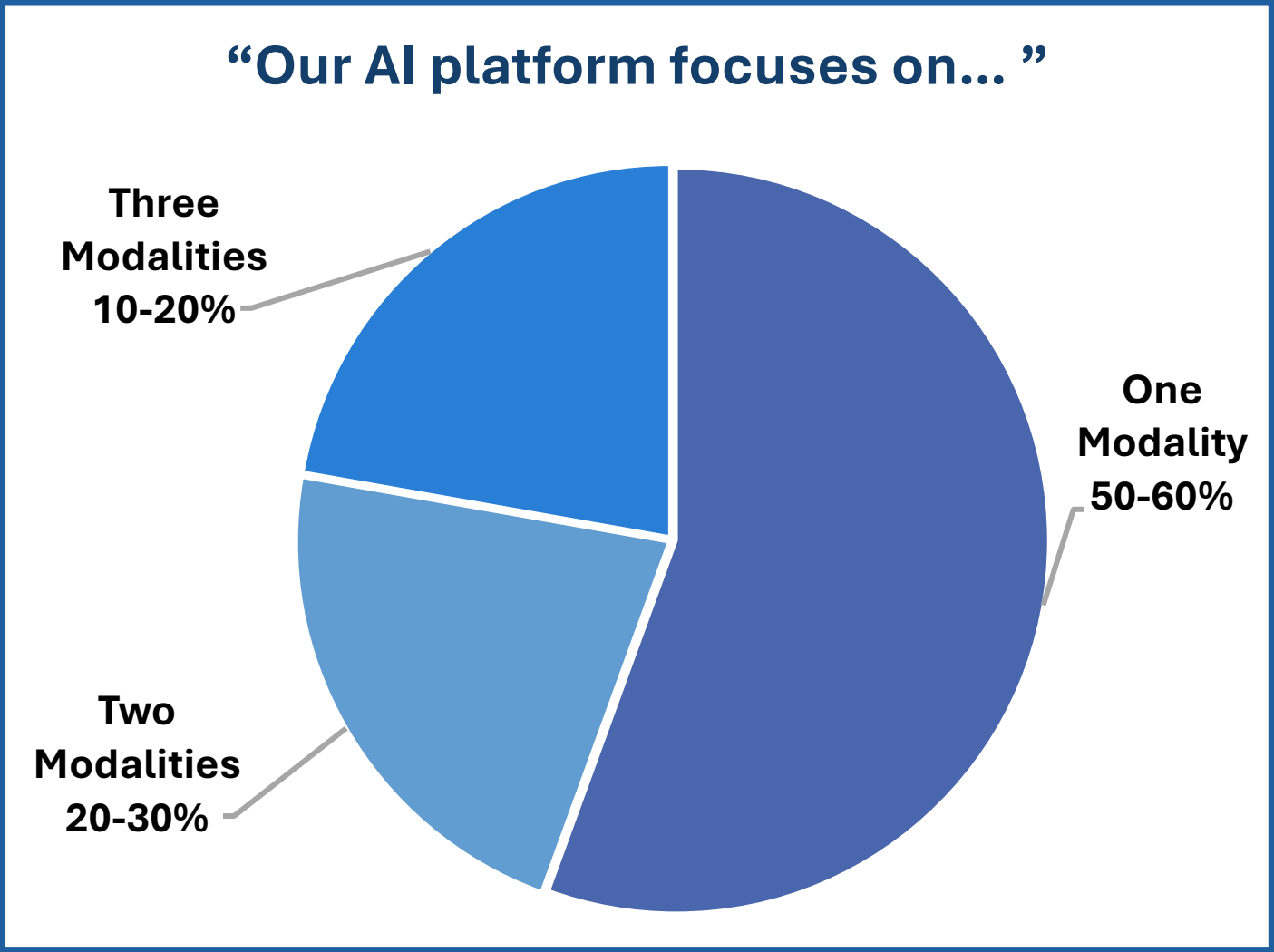


TechBio operational model is not set in stone

French TechBio will continue to be strongly positioned on discovery and preclinical phases



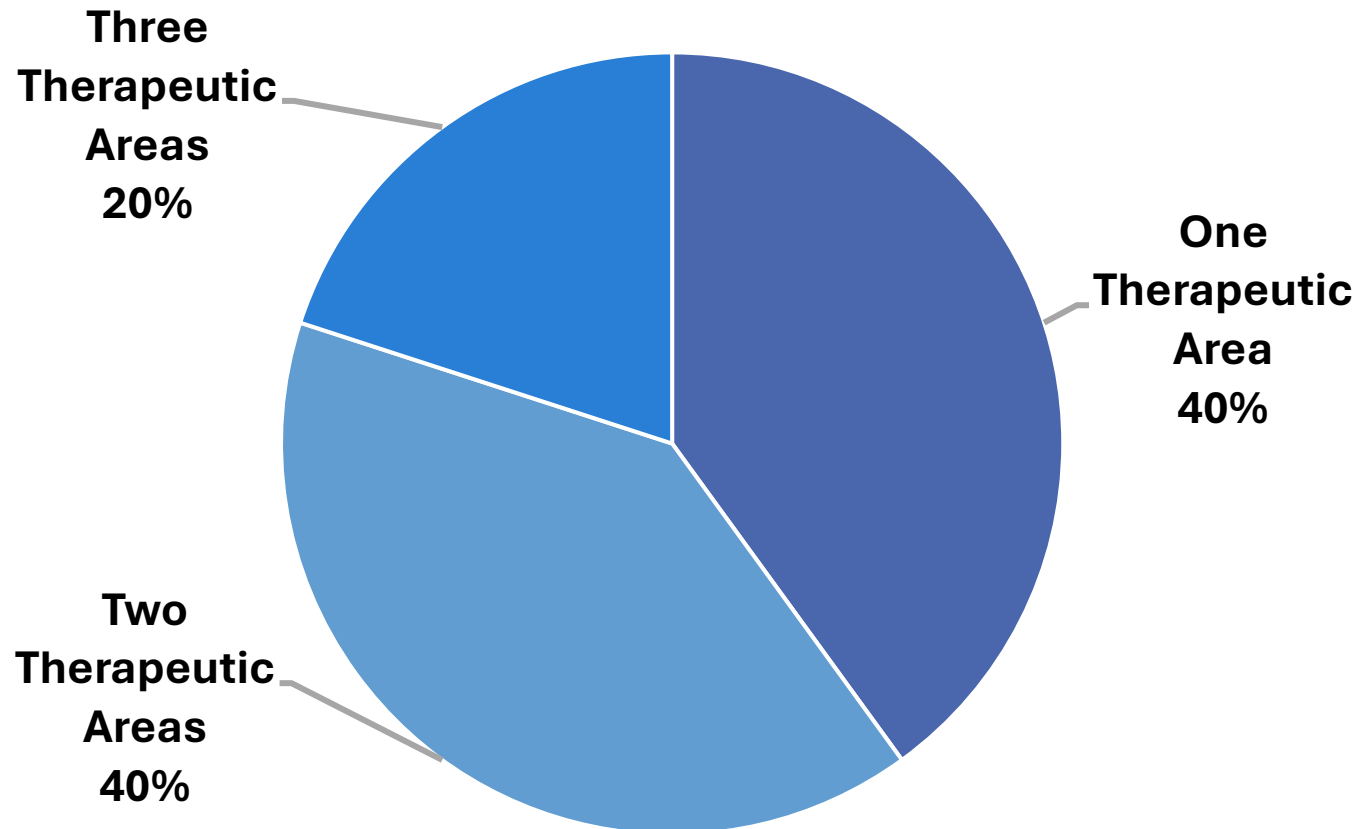
French TechBio focus primarily on one modality, and small molecule programs take the lion's share



Small molecules are the most researched modality

While French TechBio are agnostic in terms of therapeutic areas of interest, academic spin-outs play to their strengths

“Our therapeutic programs focus on...”




Oncology is the main therapeutic area of interest (56% of answers), followed by Immunology & Inflammation (33%)



In most cases, focus on a therapeutic area is done for scientific rather than commercial reasons

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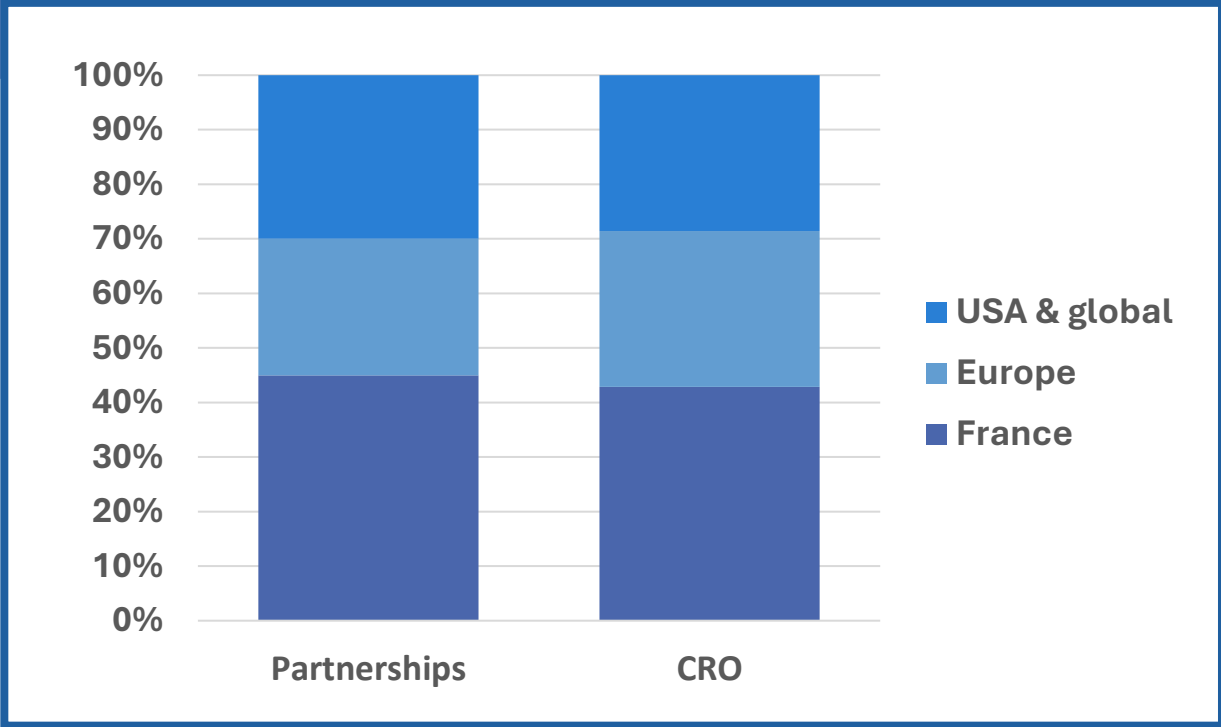
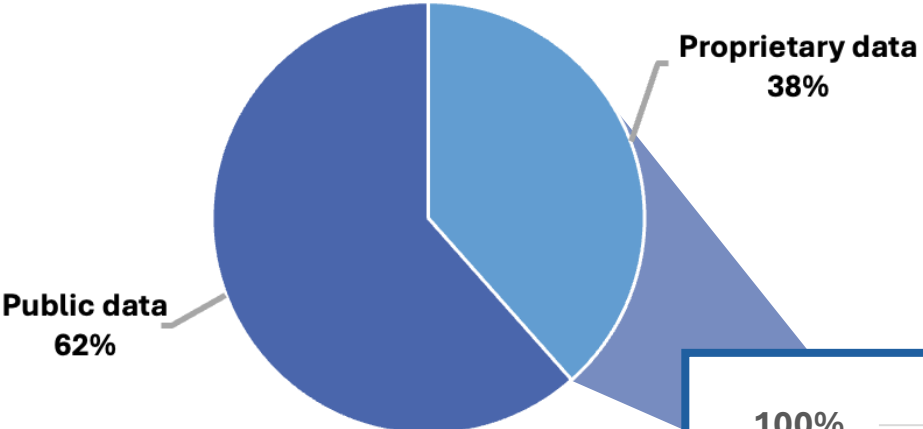
- French TechBio work towards developing proprietary bio-assets
- Expanding into Wet Labs (either in-house or externally) is a clear next step
- No plan to go into the clinic
- All modalities studied
- Oncology is the top therapeutic area of focus
- Scientific rationale outweighs commercial considerations when choosing a therapeutic area

Access to Data

Funding & Partnerships

Access to Data




Almost 2/3rd of French Techbio rely on Public Data



External data through partnerships or contractual agreements are sourced at c.40% from France

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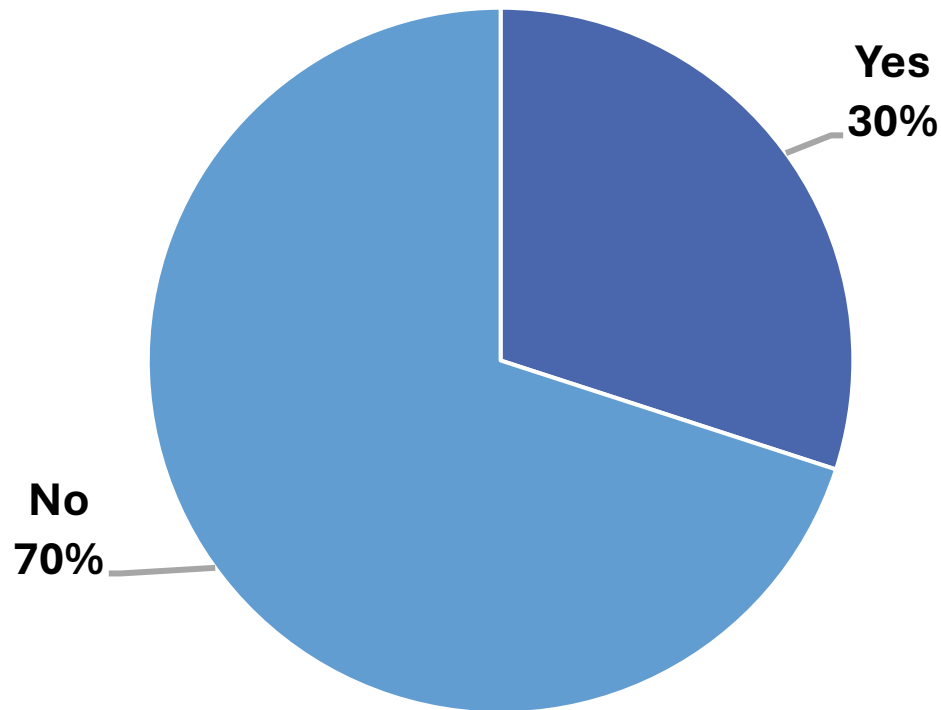
- Public data remains key
- Proprietary data is mainly sourced from France (40%)

Funding & Partnerships

Funding & Partnerships

Among our panel of French TechBio companies, fundraising in the last 12 months consisted exclusively of seed rounds

“Did you raise private funds in the last 12 months?”

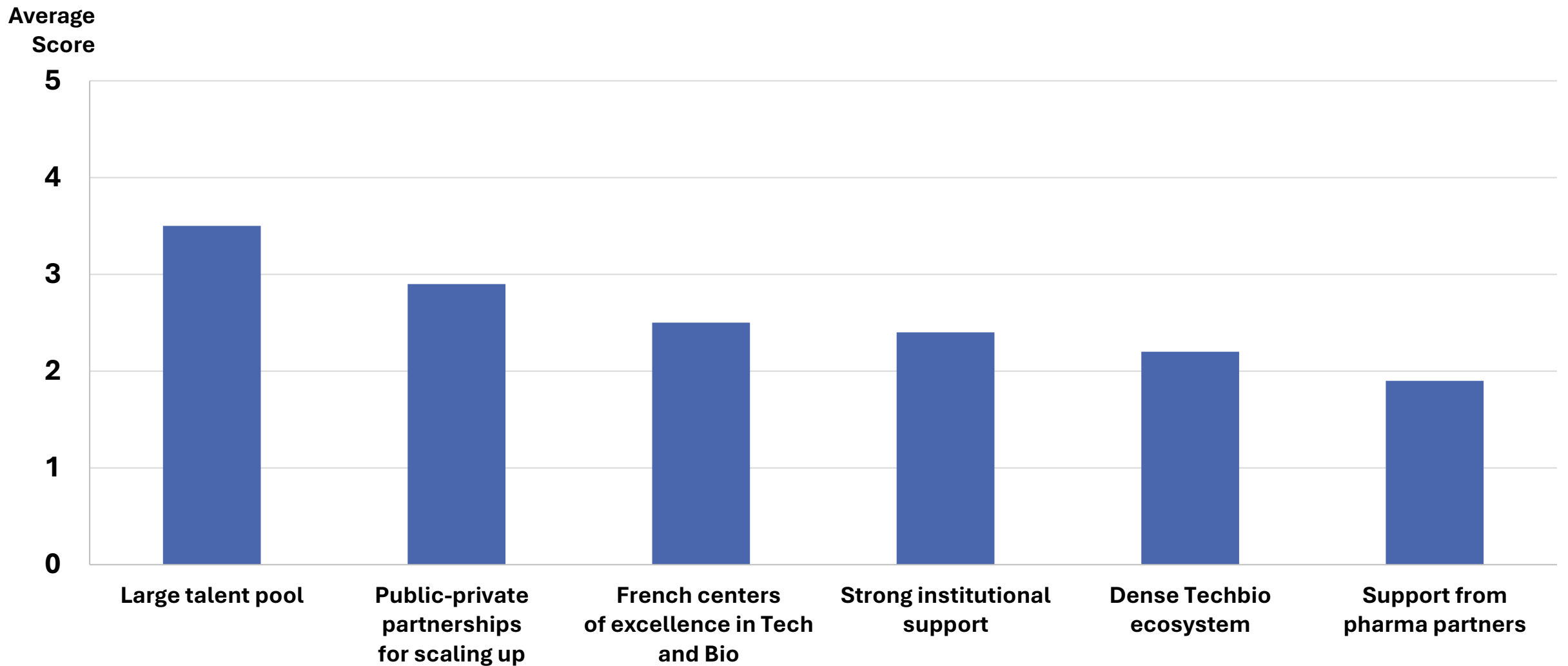


Fundraising consisted exclusively of seed rounds by companies < 3 years old

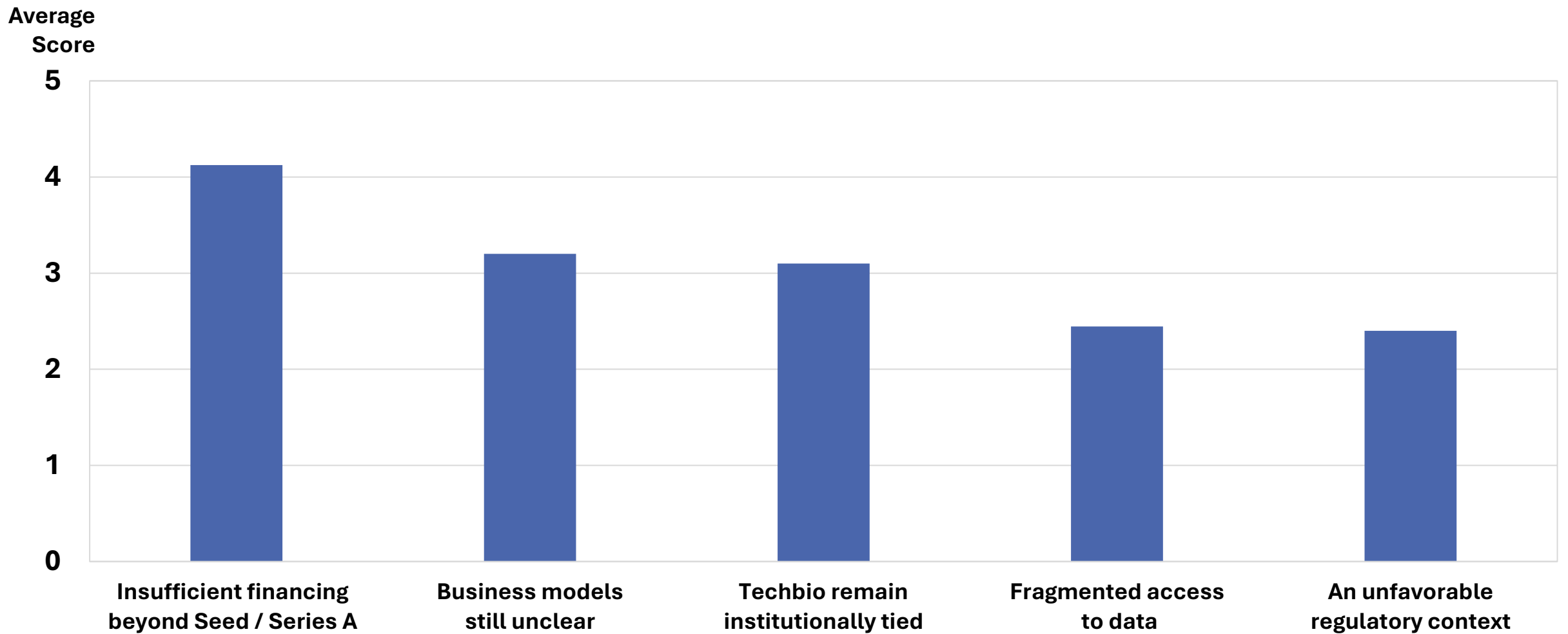


Platform development and data acquisition are the main use of proceeds

Investor feedback on key strengths of French TechBio: (1) Talents (2) Academic excellence (3) Institutional support

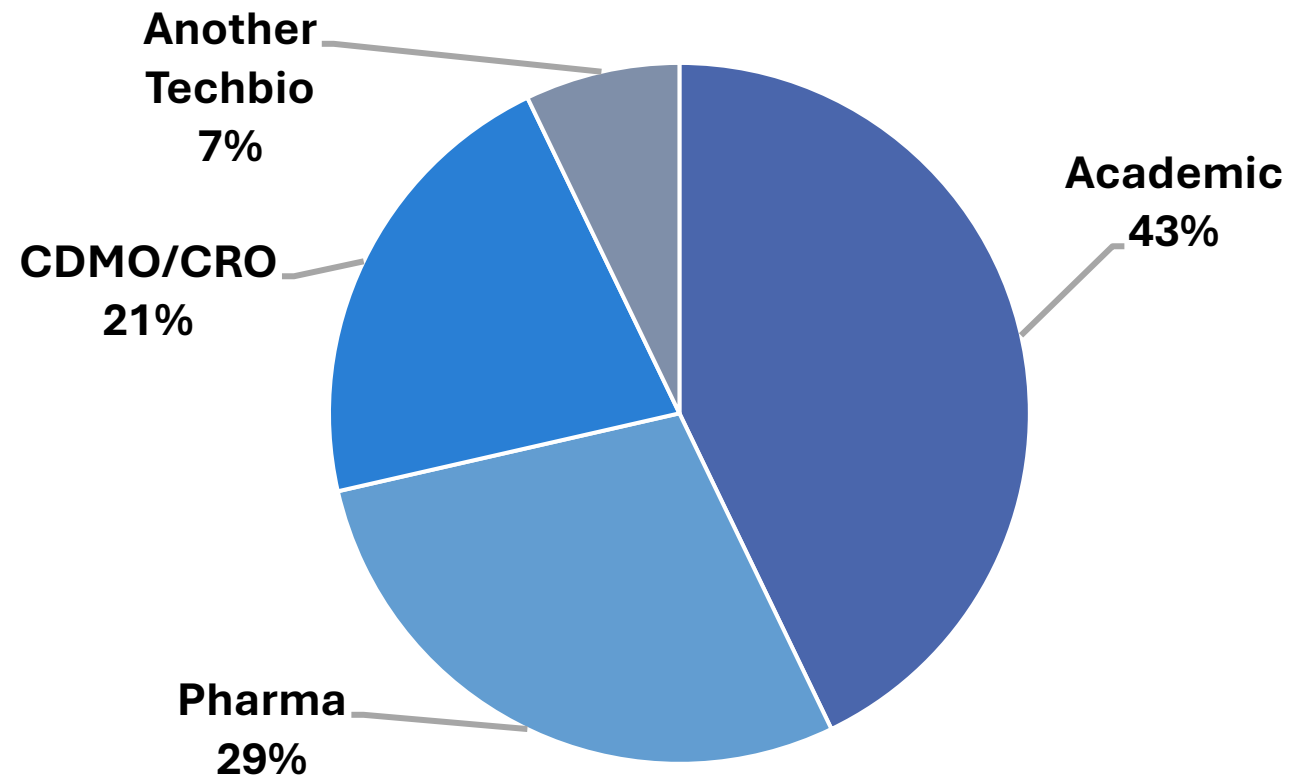


Investor feedback on key limitations of French TechBio: (1) Financing (2) Business models (3) Academic links



French TechBio partnerships are mainly signed with academic institutions and/or pharma players



“In the last 12 months, what type of counterparts did you sign partnerships with?”



Partnerships with industrial players are almost equally split between **fee-for-service (45%)** and **co-development (37%)** agreements

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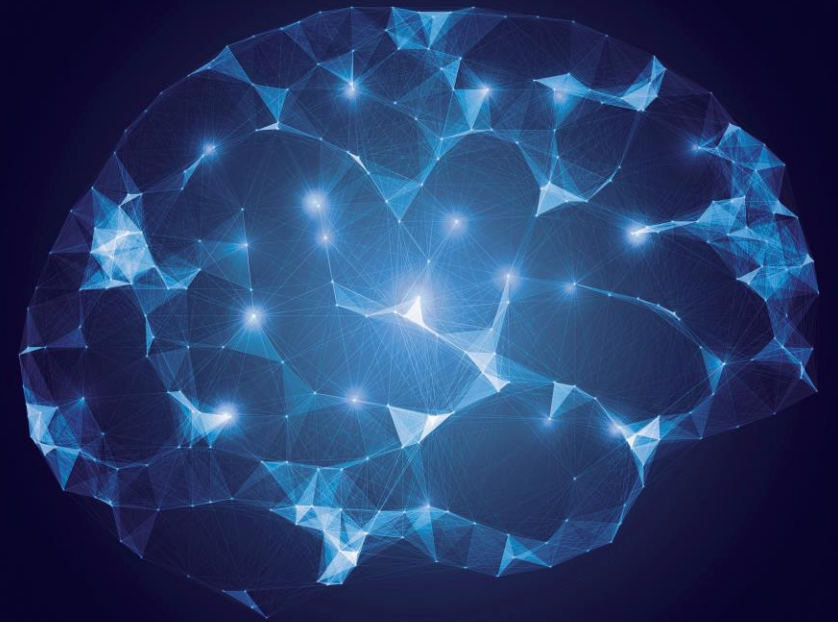
- Seed rounds in last 12M
- Funds used to develop platform & acquire data
- Academic partnerships remain key for scaling up

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Task Force members



Antonio Borderia
*EVP Business
Development*
ADLIN Science



Sarah Cordelle
*Lead of Strategic and
Operational Marketing*
WhiteLab Genomics



Timothé Cynober
*Head of Business
Development & Licensing*
WhiteLab Genomics



Chloé Evans
*Deputy Director General,
Head of market research and
international relations*
France Biotech



Fanny Goretta
*Business Development
Associate*
WhiteLab Genomics



Mathieu Losguardi
*Coordinator Business
Development Think Tank*
France Biotech

Chief Financial Officer
WhiteLab Genomics



Marie Meier
Analyst officer
France Biotech



Diane-Laure Pagés
Chief Operations Officer
Orakl Oncology

