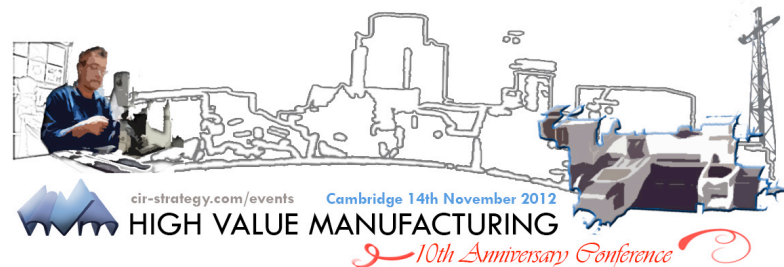


Conference Programme

- 0900 Coffee and Registration
0930-1110 Introductory Session:
High value manufacturing in the East and Cambridge region
0930 **James Gray**, Invest East of England
Sponsors' Opening Address
0940 **Mike Gregory**, Head, University of Cambridge Institute for Manufacturing
Chairman's Opening Address
0950 **Matthew Bullock**, Chairman, Norwich and Peterborough Building Society
Regional Keynote talk: Understanding regional economies to leverage enduring investment
1010 **Hermann Hauser**, Amadeus Capital Partners
Cambridge Keynote Talk: Main areas of high value manufacturing: will the next billion dollar Cambridge company make products?
1030 **Justin Hayward**, Cambridge Investment Research Ltd
High value manufacturing in the East: where can R&D and manufacturing connect?
1050 **Peter Kimpton**, COO, BCI Electronics
Manufacturing in a higher cost region
1110-1120 Coffee: Networking
1120-1245 Session 2: Industrial Inkjet Technology
1120 **Graeme Minto**, Founder Domino Printing Sciences Plc
History, Overview and Introduction to the Inkjet subcluster
1130 **Steve Temple**, Technical Director, Xaar Plc
Manufacturing business models in industrial inkjet printing
1155 **Bill Baxter**, CEO, Inca Digital Ltd
SME business model challenges for digital imaging
1220 Q&A with **Mike Gregory**, **Gerald Avison**, **Graeme Minto**, **Steve Temple**, **Bill Baxter**, **Hermann Hauser**
1245-1330 Lunch: Networking, Deluxe Buffet in Foyer & Exhibition Area
1330-1510 Session 3: Microsystems
1330 **Thomas Sachson**, Director, WestLB Panmure
Changing Attitudes toward public investments in the tech markets
1345 **Phil O'Donovan**, MD, Cambridge Silicon Radio
High value wireless chips and International mass markets
1405 **Scott Brown**, R&D Director, Cambridge Display Technology
Materials, printing technology and market needs: SCM, IP, supply chains & manufacturing
1425 **Stuart Evans**, CEO Plastic Logic
Building a business model for on-demand organic led-chip production
1445 Q&A with **Mike Gregory**, **Hermann Hauser**, **Scott Brown**, **Stuart Evans**, **Thomas Sachson**, **Howard Biddle**, **Phil O'Donovan**
1510 Coffee: Networking
1520-1630 Session 4: Biotech
1520 **Jeff Solomon**, CEO, ERBI
Biotech and manufacturing
1535 **Richard Archer**, CEO, The Automation Partnership
Profiting from integrated high-value manufacturing in the East of England
1555 **John Wilkinson**, CEO, AstronClinica
Specialist manufacturing: venturing up the value chain
1615 Q&A with **Mike Gregory**, **Jeff Solomon**, **Richard Archer**, **John Wilkinson**, **Howard Biddle**
1630 General Q & A with **Mike Gregory**, **Howard Biddle**, **Alisdair Poore**, **Gerald Avison**
1655 **Gerald Avison**, TTP Group, Managing Director
Closing Remarks
1700 **Drinks: Networking**



VM10th ANNIVERSARY CONFERENCE 2012 CAMBRIDGE

Opening Session - Introduction
9:00 Dr Justin Hayward, Director, CIR Strategy - **A Decade of HVM**
9:10 Professor Sir Michael Gregory CBE, IfM - Chairman's Introduction
9:30 Will Barton TSB Head of Manufacturing
reat British High Value Manufacturing
9:45 Phil O'Donovan, Founder CSR plc
VM - A suitable model for the UK
1:00 Sir Robin Saxby, Founder ARM plc, Angel Investor
reating Wealth from Technology - ingredients for success, challenges & ideas
1:10 Panel with speakers, Mike McCreary, & Matthew Bullock, former CEO NPBS

1:30 Coffee break

Session 2 - Printing, electronics, processes
1:50 Indro Mukerjee, CEO, Plastic Logic
aping the next industrial revolution
2:05 Scott White, CEO, Pragmatic Printing
igh Value Manufacturing for Low Cost Electronics
2:15 Ray Southam, CEO, Tonejet
orld's first industrial full colour, photographic quality, digital can printer
2:30 Hugo Spowers, Founder, RiverSimple Automotive
pen Innovation & British HVM
2:40 Panel with Moderator Peter White, Chairman, YTKO

3:00 Lunch and Exhibitions

Session 3 - Nano, bio, pharma
4:00 Sir John Gurdon, Nobel Prizewinner 2012, Cambridge University
4:15 Richard Archer, former CEO TAP Biosystems, Cell Therapy Catapult,
'our Bits will be Ready Tuesday' - Regenerative Medicine
4:30 Prof Andrew Miller, CSO, Global Acorn
ringing advanced therapeutics and diagnostics to market
4:45 Nathan Hill, Q13, Conference Media Partner
esting in HVM Gems
4:55 Billy Boyle, Founding Director, Owlstone Nanotechnologies
EMS manufacturing and emerging opportunities for hardware start-ups
5:10 Panel with Moderator Nick McCooke, Former CEO Solexa
5:30 Tea break

nal Session
5:00 Nick Courtts MA; Economist, CIR Strategy
oing to market along routes to high value
5:20 Dick Elsy, CEO HVM Catapult
he High Value Manufacturing Catapult
5:40 Sir Michael Marshall CBE, Chairman, Marshall Group
igh Value Manufacturing Successes in Cambridge
7:00 Panel with Lord Sainsbury; Chairman's Summary
7:30 Networking & Champagne Reception

This 10th Anniversary HVM Conference, covering the vision for a thriving economically healthy manufacturing sector in the UK, brought to you by CIR Strategy in association with Plastic Logic, ToneJet, Galu & BritonEMS, is part of the CIR Conferences series, which has run 27 times since 2002. Smart Grids 2013: www.cir-strategy.com/events/register or 01223 303500

PLASTIC LOGIC



TONEJET

GALÚ



High Value Manufacture

What is high value manufacture?

1. Market is emerging, niche, being disrupted
2. Market is for technical or complicated products
3. Processes are not familiar, or widely well-tried and tested
4. Products are high margin (lots of customer benefit/need)
5. Products need above average at-hand expertise
6. Product follows from hard R&D

Source: CIR Strategy Report 2002 for IEE
“High Value Manufacturing in the East of England”

HVM means:

Faster to market
Global markets
Better design
More reinvestment in RD&D
Lowering cost, max price
More open, collaborative
Better, more local jobs
More inspiring
Global strategy
Less reliance on government

More competitive

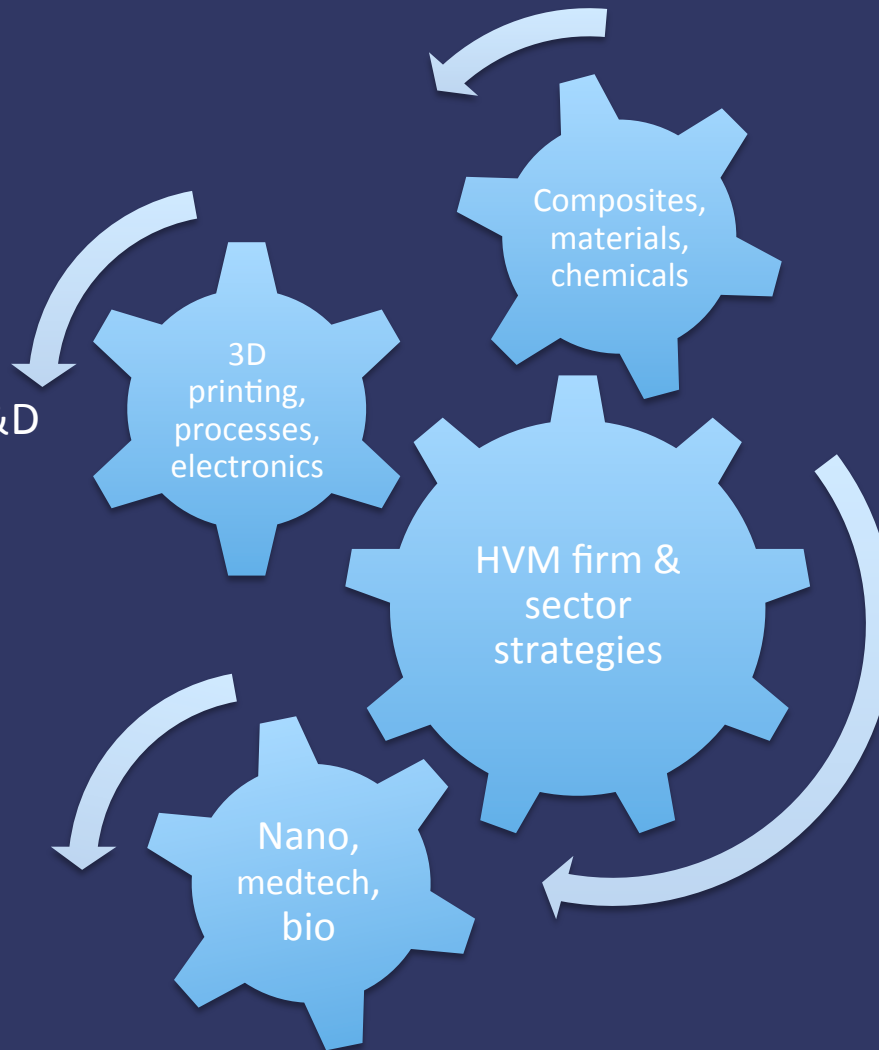
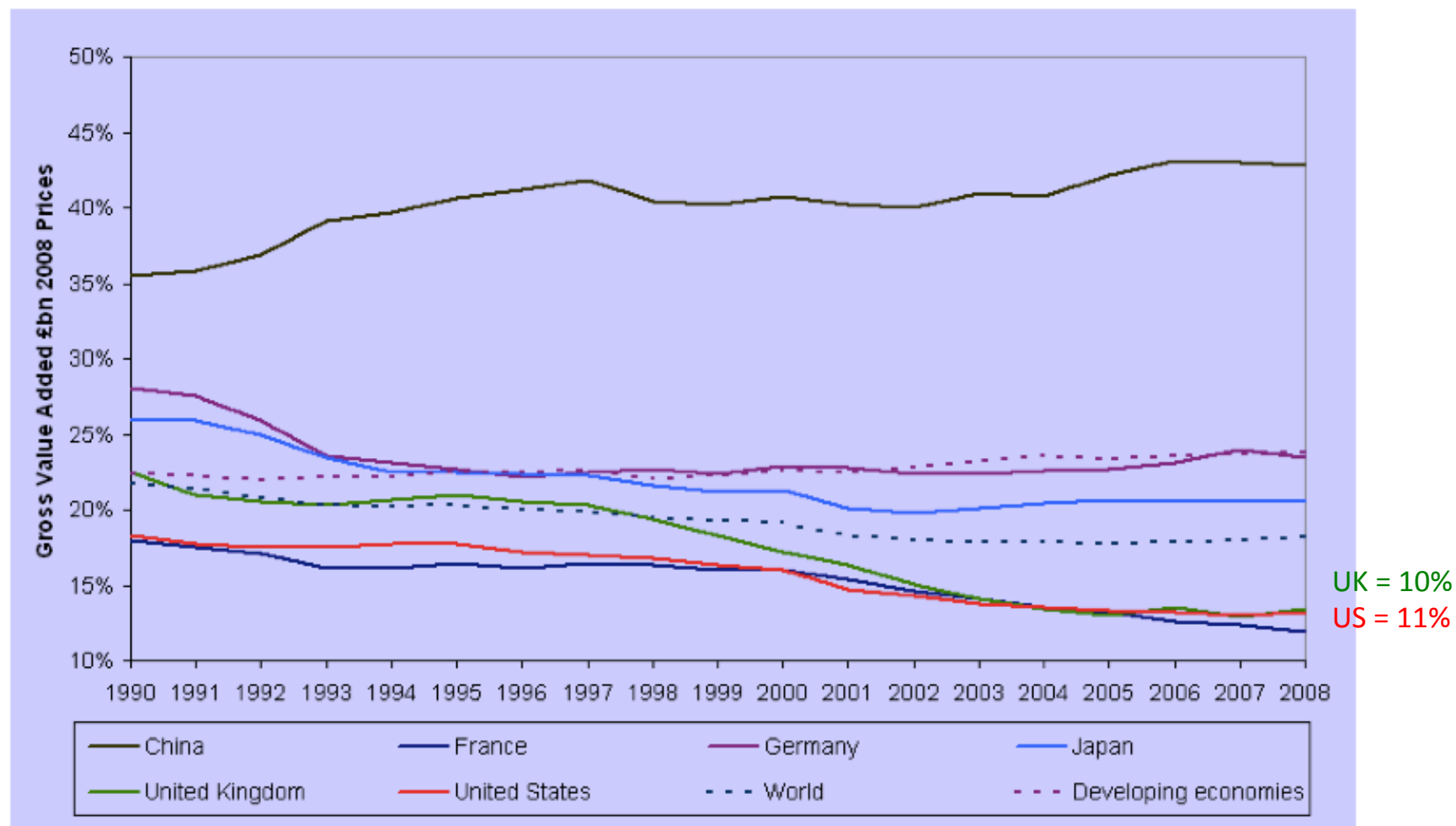


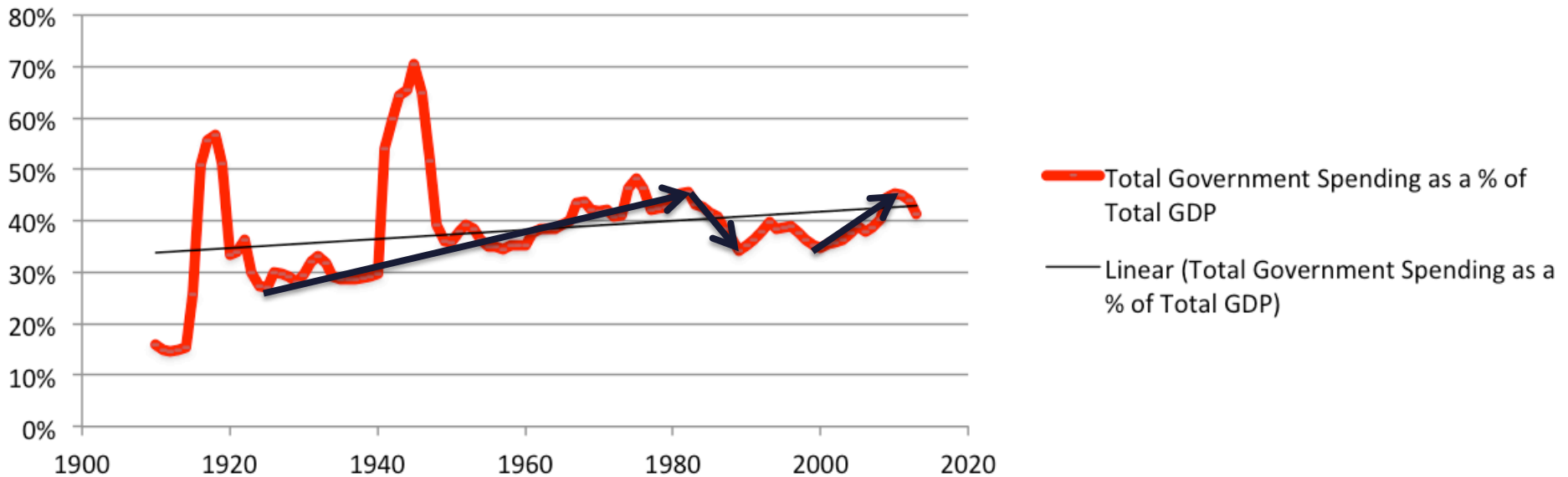
Figure 1: Manufacturing as a percentage of GDP globally and across comparator countries



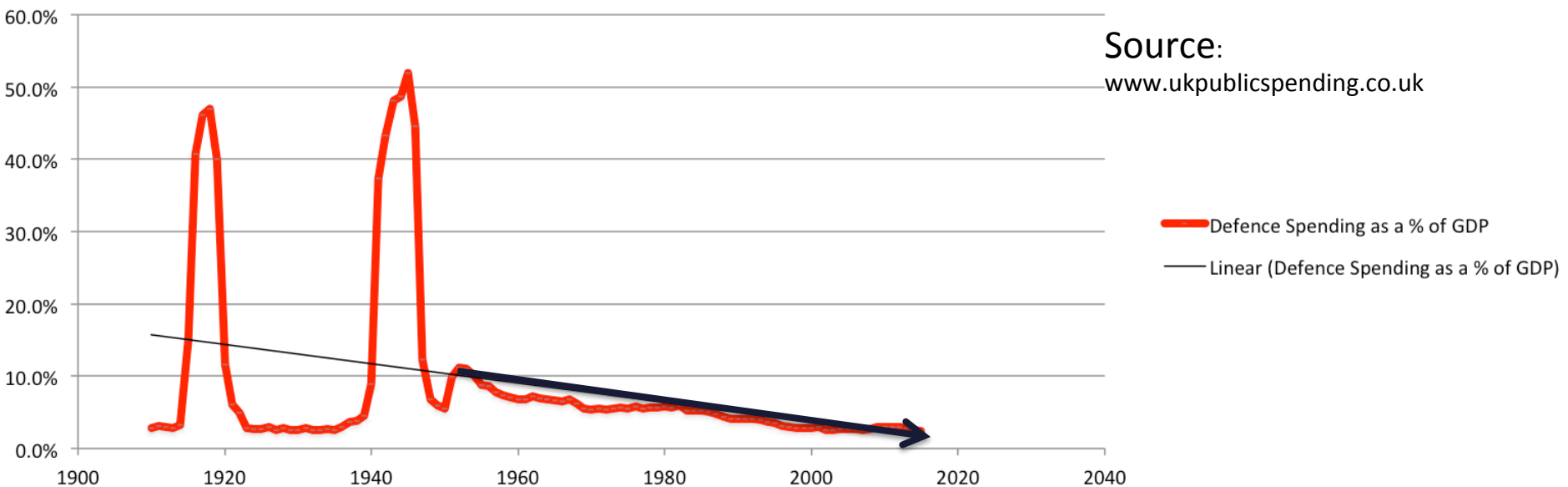
Source: UNCTAD Handbook of Statistics

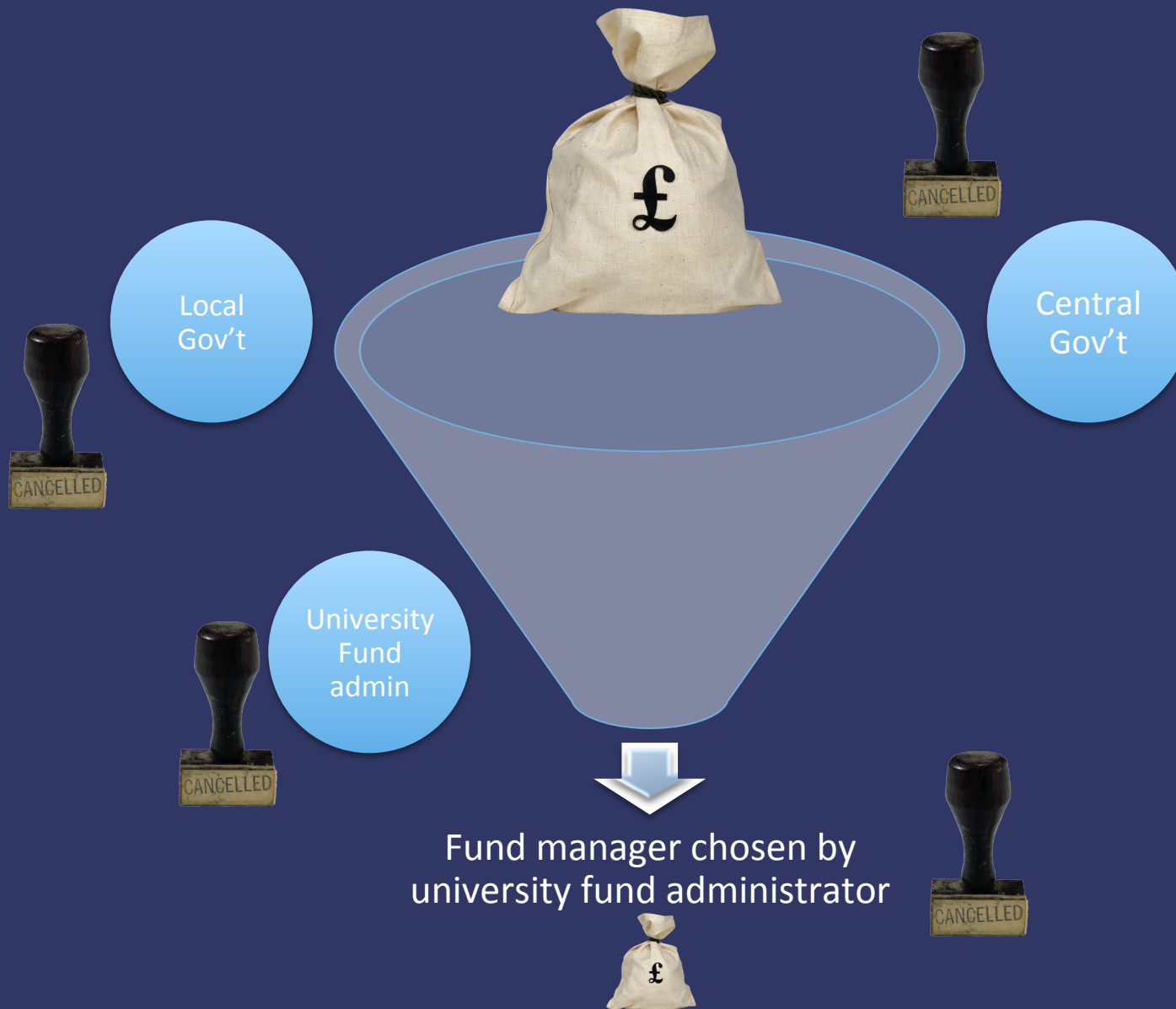
Source: Dept of BIS Dec 2012, Economics Paper 10B

UK Total Government Spending 1910 - 2013



UK Defence Spending % of GDP 1910 - 2015





Entrepreneurs



Angels
Corporates
Crowdfunding
Lean startups
Etc



Entrepreneurs

Soapbox “Thesis”:

1. Structural reform to flat, simple & low tax & focus any gov spend on defence, infrastructure (incl b’band) & HVM-related areas,

2. Private sector confidence through entrepreneurship

3. Emergent new ways to fund and start up & build companies & support institutions in the private sector

Can Britain win?

London 2012...
...203 countries compete

Rank*	Country	Gold	Silver	Bronze	Total medals	Total Population (m)	Medals/ Mn- persons
1	Great Britain	29	17	19	65	62	0.46
2	Russia	24	26	32	82	140	0.17
3	United States of America	46	29	29	104	317	0.14
4	People's Republic of China	38	27	23	88	1354	0.03

*Countries with more than 10 million inhabitants.