

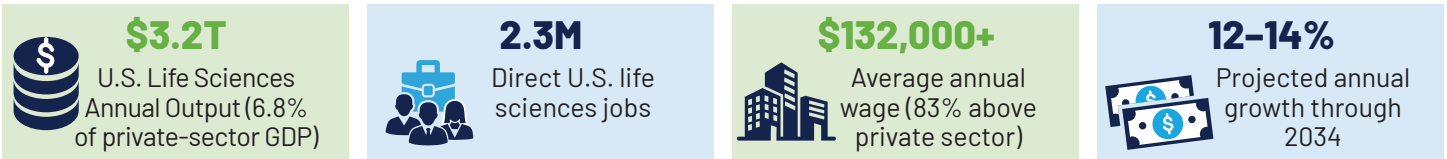


# Pathways & Partnerships:

A ROADMAP FOR GEORGIA'S LIFE SCIENCES SECTOR

*Positioning Georgia as the Scale-Up Manufacturing Hub of the Southeast*

## The \$3.2 Trillion Opportunity



*The choice is stark: either organize now around a coherent life sciences strategy, or accept that the next decade of company formation, biomanufacturing, and high-wage jobs will flow toward better-aligned states."*

### Georgia's Vision: The Scale-Up Manufacturing Hub

The Missing Middle—Georgia has strong research universities and large-scale manufacturing, but lacks the critical infrastructure for growth-stage companies:

- Small- to midscale, FDA-grade manufacturing suites for growing companies
- Shared quality control and testing labs
- Regulatory and compliance support
- Flexible, affordable scale-up facilities

**This gap forces Georgia companies to relocate at their highest-growth phase.**

### Georgia's Current Strengths

Nearly **4,000** life science-related organizations

**78,000** direct workers Employment growing 2x faster than overall private sector-related organizations

**World-Class Logistics:** Hartsfield-Jackson Airport + Port of Savannah + 2-day truck to 80% of U.S.

**30-40% Lower Costs** vs. Boston, San Francisco, San Diego

**Research Excellence:** Georgia Tech, Emory, Georgia State, UGA, Morehouse School of Medicine, Augusta University






**Corporate Anchors:** Takeda, J&J, Boehringer Ingelheim, Boston Scientific, Alcon, Dendreon

**Global Health Hub:** CDC, Task Force for Global Health, CARE—unmatched nationally



*Georgia's window to lead is now. Together, we're building the Southeast's premier destination for life sciences innovation and scale-up manufacturing."*

## Five Strategic Pillars

	CORE CHALLENGE	STRATEGIC RESPONSE	OUTCOME
 Scale-Up Manufacturing Infrastructure	Missing GMP scale-up facilities	Multi-tenant GMP complex + QC labs + regulatory support	25-30 companies using shared facilities by Year 5
 Workforce and Talent Pipeline	Shortage of skilled technicians and mid-level talent	K-12 awareness + technical college certificates + university degrees + professional development	200+ students/year with high placement rates
 Capital and Investment	Limited VC and thin investor base	Georgia Life Sciences Investment Credit (GLSIC)(35% tax credit) + \$75M Scale-Up Fund + SBIR match + \$100M SPV platform	5:1 private-to-public leverage + Georgia Investor Day
 Policy, Incentives, and Regulatory Environment	Fragmented, non-tailored incentives and permitting delays	Bioscience-specific playbook + streamlined permitting + utility coordination	Competitive, fast-track environment
 Ecosystem Coordination and Collaboration	Fragmentation and no unified voice	GLS as orchestrator + unified brand + data platform + regional and national collaboration	Regular convenings, clear roles, policy wins

## Implementation: Three Phases

### Phase 1: Foundation (Years 1-2)

Launch Georgia Life Sciences Investment Credit (GLSIC) & SBIR matching • Policy Playbook published • Training Center expansion begins • Site identification complete • First BioReady® Communities certified

### Phase 2: Scale-Up (Years 3-5)

GMP complex operational • 25-30 companies in shared facilities • 200+ students/year in LS programs • Special Purpose Vehicle (SPV) platform & Investor Day launched • 50+ SBIR awards matched annually

### Phase 3: Hub Status (Years 5-10)

4,000+ new direct jobs • 5:1 private-to-public capital leverage • 5-7 companies graduate to dedicated plants • Multiple exits/IPOs • National top-10 ranking

### Georgia's Unique Edge:

- World's busiest airport plus one of North America's fastest growing deepwater ports, giving Georgia unmatched end-to-end logistics for time sensitive life sciences supply chains
- Cross-sector (biopharma, medtech, ag-biotech, industrial biotech)
- 30-40% lower operating costs vs. coastal hubs
- Top-tier research institutions
- Only state with CDC + global health ecosystem

## Key Performance Indicators

**Company Growth**—New formations, retention, relocations

**Capital**—VC/PE deployed, SBIR awards, 5:1 leverage target

**Workforce**—200+ graduates annually, job placement rates

**Infrastructure**—Wet-lab/GMP space added, BioReady Communities

**Ecosystem**—National rankings, media presence, stakeholder satisfaction

## Join Georgia's Life Sciences Future

**Companies**—Shape workforce programs, infrastructure priorities, policy advocacy

**Investors**—Leverage Georgia Life Sciences Investment Credit (GLSIC) & Special Purpose Vehicle (SPV) platforms, connect portfolio companies

**Universities**—Align curricula, support spinout retention

**Economic Development**—Pursue BioReady certification, identify sites

**Policymakers**—Champion funding, regulatory modernization

For definitions, data sources, and full recommendations, please refer to the complete Roadmap at [galifesciences.org/roadmap](http://galifesciences.org/roadmap).