

(1) Introduction

Over centuries London has re-invented itself time and again. In economic terms, the 1980s and 1990s saw London become a global financial centre; after the Millennium it became a global hub for creative and digital industries. And most recently, it has begun to assume a similar role in supporting life sciences. Our latest paper on the London real estate market describes the recent growth of the sector and its evolving demand for real estate in the capital.

Until quite recently, science and lab space in London real estate was virtually unknown – the low density in use, together with specification demands, made such space uneconomic. But as technology changes the nature of lab space, and as the wider attractions of city centre work – restaurants, bars, culture, leisure and shopping – become more important to staff, so the equation is changing. Life sciences are rapidly growing and evolving in London.

The life sciences include many scientific disciplines concerned with human life and health, such as biomedical science, clinical biochemistry and virology, and lobby group MedCity define the sector as comprising two sub-sectors, namely biopharmaceuticals and medical technology. These sub-sectors develop, produce and sell therapeutic products and medical devices respectively. ¹

(2) National context

The Government's *Industrial Strategy* claims that the UK is home to one of the strongest, most productive life science industries globally, rooted in a strong science base where there is a "*commitment to building a complete ecosystem that brings together innovation, development, commercialisation ... enabling innovators to benefit from a complete development cycle and businesses to grow and thrive*". ²

The life sciences industry is one of the most important pillars of the UK economy, contributing almost £89bn in turnover, with 6,330 businesses employing 268,000 people across 7,180 sites. Of the total jobs, 11% are in London and 24% in the South East. ³

Noting that the sector is evolving quickly in response to developments in medtech, data and digital-based technologies, the *Strategy* claims that the UK is now a leading global cluster with strong growth in key areas. For example, digital health is now the largest medtech segment, and inward investment to the UK artificial intelligence sector has increased rapidly, at a faster rate than the whole of Europe.

Underpinning growth in the sector is the UK's powerful research landscape and high-quality science base. The UK is home to two of the top ten universities in the world for life sciences: Oxford (2nd) and Cambridge (=3rd); with Imperial College at 15 and University College at 22. ⁴ The UK's share of life science academic citations (12%) and its share of most cited life sciences academic publications (18%) are ahead of Germany, Canada and France, and second only to the USA. ⁵

The UK is also a driving force for innovation and is maximising benefit from its world-leading research. Research shows that 32% of UK life sciences companies

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have been spun-out from academic institutions – ten times the rate across all sectors.⁶ Between 2013-17, the UK was home to five of the top ten universities in the world (and the only European country) by value of capital raised via their spin out companies, including world-leading Cambridge.⁷

The role of universities and other public sector institutions is critical to the dynamism of start-up and spin-out activity. A recent report demonstrated that the number of UK life science start-ups in 2016-20 increased by 24% on the previous five-year reporting period, to a total of 681, and almost double the rate of ten years ago.⁸

Of course, the Covid-19 pandemic threw a spotlight on public health and the need for strategic intervention by government to prepare for future threats. In June 2022 it was announced that the Vaccine Taskforce and the Office for Life Sciences had reached a deal with Boston-based Moderna to build a vaccine research and manufacturing centre in the UK. The new mRNA Innovation and Technology Centre will develop cutting-edge mRNA vaccines for a wide range of respiratory diseases, including Covid vaccines able to protect against multiple variants.

The pharmaceutical company will also open a large mRNA manufacturing centre, which will offer UK patients guaranteed access to Moderna's Covid vaccine and the ability to produce jabs targeting a range of other illnesses, ensuring NHS patients can access the latest advancements in vaccine technology quickly and providing a consistent home-made supply.

The centre will be able to scale up production rapidly in the event of a health emergency, significantly boosting the UK's ability to respond to future pandemics. Construction is expected to commence as early as this year, with the first mRNA vaccine due to be produced in the UK in 2025.⁹

Data from the BioIndustry Association show that total investment in the life sciences sector reached a record £4.5bn in 2021, nearly double the £2.8bn invested in 2020. And the interest continues to grow. A recent report identified £20bn of capital looking to invest in UK life science real estate.¹⁰

In one example, in June 2022, Beijing-based Pharmaron Biologics submitted plans to add more than 400,000 sq ft of R&D space to its growing life sciences campus in Speke, Liverpool. The R&D service provider bought the 10.8 acre Estuary Banks site from AbbVie, as part of its £96.5m deal to acquire Allergan Biologics. At the time, it said the site would support its aims to build an integrated cell and gene therapy services platform.

In another example, US private equity firm Harrison, and JV operator partner Trinity Investment Management, acquired a portfolio of five life science and innovation properties across the UK. The portfolio comprises 1.6m sq ft of lab and office space in Colworth, Edinburgh, Kent, Manchester and Newcastle. Four of the five properties in the portfolio are multi-building campuses with supporting amenities, including cafes, nurseries, gyms, communal workspaces and presentation spaces.

Despite these two examples, the bulk of new life science investment goes to the South East and the East of England. In 2021, these two regions accounted for 83%

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of life sciences investment and all the growth in the number of start-ups.¹¹ This established pattern of investment means that one of the largest concentrations of life science activity in the UK, and indeed in Europe, sits within the 'golden triangle' – an area bounded by Cambridge, Oxford and London. The presence of world class universities and hospitals within this triangle is no coincidence.

Investor interest in life science real estate in the Golden Triangle has exploded in the past three years, and pricing has acted accordingly. A record amount of capital is targeting the sector, investment volumes doubled in 2021 and values have shot up. The following points summarise some of the major players and investments over the past three years.

- New York-based **Blackstone** purchased the Cambridge International Technology Park for £135m and a 27 acre site at Granta Park for £104m.
- Pension fund **Brockton Everlast** paid £99m for five buildings on Cambridge Science Park, and now owns 12 assets on and around Cambridge Science Park. Brockton's Science Real Estate & Innovation division is focused on creating science buildings across the Golden Triangle.
- Canadian investor **Brookfield Asset Management** owns a UK-focused life sciences property platform comprising 1.6m sq ft of assets (including the Harwell Science and Innovation Campus). Brookfield plans to invest £1.5bn-£2bn in developing buildings over the next 5-10 years to more than quadruple its existing footprint.
- Singapore sovereign wealth fund **GIC** purchased a 40% stake in Oxford Science Park for around £160m from Magdalen College.
- **Kadans** purchased Merlin Place, located opposite the entrance to Cambridge Science Park. The building is currently a c30,000 sq ft office building becoming vacant in 2022. After gaining vacant possession and planning consent Kadans will deliver a new building with laboratory and office space.
- **Legal & General and Oxford University** gained planning permission for a new £200m life sciences building known as the Life and Mind Building – the University's largest ever building project.
- **Oxford Properties** entered the UK life sciences market with the acquisition of 310 Cambridge Science Park (occupied by Astra Zeneca) for £45m in 2021.
- **Tishman Speyer** and biotechnology investment firm Bellco Capital announced a new £2.4bn fund to buy and develop life science buildings.
- **UBS and Reef Group** have joined forces to create a £900m life sciences cluster in Stevenage, on 33 acres of land acquired from GSK. The venture plans 1.4m sq ft of laboratory and office space next to GSK's global R&D facility. The site also hosts the Cell and Gene Therapy Catapult, a biotechnology hub, and the Stevenage Bioscience Catalyst. Construction of the new campus will begin next year and, subject to planning permission, will begin to open for business in 2025.



While Cambridge and Oxford have long-established life science clusters, the growth of London is, arguably, more recent. Imperial College, University College Hospital, University College London and Wellcome Trust are, of course, long-established. But the delivery of The Crick Institute and the Alan Turing Institute; the arrival of firms such as Astra Zeneca, GSK and MSD, and the emergence of dedicated real estate at King's Cross, South Bank, White City and Whitechapel, have all reinforced the sense of a cohesive ecosystem. MedCity highlighted the role of London:

*London forms a critical part of the Golden Triangle cluster – particularly in relation to AI, Advanced Therapies, Medtech and Digital Health. The challenge for London now is how it can best provide for growth and use the life sciences sector's potential to maximum advantage.*¹²

(3) Life sciences demand in London

Back in 2016, Creative Places observed that the way businesses undertake their R&D is changing, with open Innovation coming to the fore. Further, “*those locations that can offer best opportunity for businesses (both large and small) to work close to a strong research base and each other are expected to see the greatest demand for floor space into the future*”. The report noted that while staff and property costs are high in the capital, investments such as those at the Francis Crick Institute and the Alan Turing Institute pointed to strong potential for growth.

Proximity to transport hubs was also identified as critical, alongside being part of an R&D intensive city district and proximity to a hospital or university: “*Academics have multifaceted roles and travel time in the working day is hard to find*” The report concluded that London had yet to reach its full potential to attract and accommodate healthcare related R&D activity. London's position as part of Europe's strongest life science cluster “*is likely to drive strong demand in to the future*”. And while proximity to the academic base is crucial to start ups, large international businesses see London as a gateway to Europe and a very important nodal hub.¹³

As recently as the Millennium, life sciences failed to register as a sector of activity in London real estate. Following financial and professional services in the 1980s and 1990s, the creative and digital sectors bloomed in the first decade of the new century. Various science and business parks around the country (particularly Cambridge and Oxford) catered for the sector, while some of the larger companies owned and managed their own campuses.

Staff and property costs were once seen to be inhibitors to city centre science property. Science and lab space was highly bespoke to individual occupiers; it was expensive to build and it was often low density. This blend of features made the prospect of supplying such space in London's highly expensive real estate market unviable. But this has now changed.

There, there is growing international evidence pointing to life sciences activity increasingly clustering in urban areas, as distinct from regional science parks. The reasons they argue include colocation with innovators, researchers and investors, talent sources; access to global and national transport links; and amenity for employees in order to attract and retain talent.¹⁴

Key to the shift has been the move by universities, generally, to ditch their 'ivory towers' insularity – where teaching was the number one priority – to a more open model which is dependent upon relationships with other institutes, collaboration with industry and attracting funding to create commercial returns.

A further spur has been the changing nature of lab and science space. While there remains a demand for specialist space, some of the barriers to its provision have been overcome while, at the same time, developments in technology have made space requirements far more generic than in the past. As well as less demanding (in specification terms) lab space is supplemented with office space where scientists write up their findings and space for collaboration.

London also remains very attractive to investors and entrepreneurs. Its open economy, legal structures, finance markets and professional services all combine to attract businesses. This can be seen in the start-up sector. London's start-up formation is among the very best in the world. The Global Entrepreneurship Network Report of September 2021 shows London's start-up ranking is second only to Silicon Valley, and tops the table for life sciences talent.¹⁵

The growth of life sciences is such that there is now a recognised shortage of life science space in London. MedCity recently identified over 500,000 sq ft of demand for life sciences real estate in London; 270,000 sq ft of that demand being for space within two years (up from 67,000 sq ft identified in MedCity's earlier 2016). The report stated that London's wet laboratory innovation centres are all full, and that there is a desperate lack of provision for start-ups and small companies, who "*identify the lack of ready available property made fit for purpose, cost effectively and in locations that optimise their success as a primary barrier to growth*".¹⁶

(4) Designing for life sciences

The design and specification of life science environments is clearly more complex than an institutional office building. However, as hinted above, changes to the nature of life science work, and hence to the working environment, mean that there are now more areas of overlap than ever in the past. The key difference between the two types of space is the lab space in life science buildings, but at the same time, scientists have a growing need for 'standard' office space.

Labs are generally split into 'wet' and 'dry' environments. Wet labs typically involve the use of liquids, chemicals and biological matter; they often involve hazardous materials and use experimental apparatus. In these terms, they conform to the stereotypical image of a lab. By contrast, dry labs are set up for largely computational simulations and experiments. Rather than using 'real' chemicals, drugs and materials, they exploit computational power to test and simulate real life scenarios that might otherwise be too dangerous or complex. Thus dry labs have greater similarities with office space.

Wet labs typically are more demanding in terms of ventilation, drainage, water and gas supplies, and waste management. Dry labs are demanding in terms of temperature and humidity control, power supply and sometimes equipment loads.

Whether associated with wet or dry labs, scientists increasingly require access to office space (for analysis and writing), break out space for talking with colleagues and meeting space for collaborative work with partners and project teams. In this sense there is a growing trend towards more flexibility of use: lab space can be used in an agile manner by different scientists at different times.

A recent report published by the British Council for Offices set out the details of specification requirements in life science buildings.¹⁷

Servicing Laboratories often use a variety of specialist supplies such as solvents, acids, liquid nitrogen and bottled gases, including flammable substances. These are delivered by dedicated suppliers that may have special transportation and require special storage enclosures (fireproof, ventilated and secure). An external bottle store at ground-floor level is normally provided for laboratory gases. For both wet and dry labs, IT infrastructure and storage requirements are large.

Waste The handling and storage of waste require consideration. The empty containers and gas cylinders described above will need to be stored and collected on a regular, but infrequent, basis. Biological waste will need segregated storage.

Lifts A dedicated service lift is typical, and it also often doubles up as access to the plant room for items of plant. If the lift is required to transport gases, there will need to be additional controls and alarms to prevent accidents. Specific requirements should be confirmed with the stakeholder.

Structural heights Are not dissimilar of modern offices, at 2.7m to 3 m. Provision for some areas with higher usable space aids flexibility.

Floor loadings and vibration Lab spaces have more onerous specification requirements than offices. New laboratory facilities are typically designed for an imposed loading of 4 kN/m² plus an allowance for partitions. This allows for most requirements, including benching, storage and free-standing equipment, such as freezers, fridges and analytical equipment.

Risers Refrigeration pipework, electrical distribution, laboratory gases, fume extraction and laboratory extraction ventilation ductwork all require substantial risers to the roof.

The BCO report also highlighted that life science buildings must respond rapidly to new technologies and discoveries, regulatory change and business growth cycles, and that occupiers often need to quickly change the amount or configuration of their laboratory space. This might be a need to accommodate new specialist equipment, requiring refitting of existing laboratory spaces, or adding/removing walls to change adjacencies or the size of spaces dedicated to a particular activity. It may also be repurposing offices to laboratory space, or vice versa.

As well as specific design features, life science buildings are also demanding in terms of management. One of the more interesting themes emerging from the investment details listed earlier is the marrying of capital with specialist industry knowledge. Developing and owning life science buildings entails a detailed understanding of the drivers and

aims of the occupiers and a sensitivity to their relationships with collaborators and customers, as well as their day-to-day operations. The 'let-and-forget' approach taken to many office and retail schemes is certainly not appropriate with life sciences. More integrated ownership and management models are called for.

(5) A cluster of clusters

London is a cluster of life science real estate in its own right; but within this large geographical area, there are in fact a number of smaller clusters. In this final section we summarise their main features.

Cluster 1: Canary Wharf

In March 2022, Canary Wharf Group and Kadans Science Partner formed a joint venture to develop a new 750,000 sq ft life-science focused, wet lab enabled building at Canary Wharf – thought to be the largest of its type in Europe. The development will be the first phase in the creation of a world leading centre for health and life sciences on the eight-acre North Quay site, next to the new Elizabeth Line underground station.

The project brings together CWG's construction, development and placemaking experience with Kadans' expertise in the development and management of life sciences buildings and ecosystems. The 22-storey, building, due for completion in 2026, will be the largest commercial, wet lab enabled life science building in Europe, with full flexibility allowing lab space on all floors. Kadans will curate a campus ecosystem housing SMEs, academics and global healthcare and pharmaceutical companies.

Cluster 2: King's Cross

This is one of the best-known life science clusters, itself being part of the more broadly defined 'knowledge quarter'. The area is home to the Alan Turing Institute; the Crick Institute, University College Hospital, University College London and the Wellcome Foundation.

The Wellcome Trust, opposite Euston Station, is the world's second wealthiest charitable foundation, with an endowment of over £23bn. One of the Trust's best-known beneficiaries, The Crick Institute, opened in 2016, bringing together 1,500 scientists and support staff in the largest biomedical research facility under a single roof in Europe. Other King's Cross area occupiers include the following.

- **Astra Zeneca** opened its expanded, 37,000 sq ft HQ at 2 Pancras Square in February 2022.
- **DeepMind**, owned by Alphabet/Google, moved in 2020 from Google's building at 6 Pancras Square to the 35,000 sq ft 14-18 Handyside Street on the King's Cross campus.
- **GlaxoSmithKline** has opened a £10m hub in King's Cross to leverage AI for the discovery of new cancer treatments.

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- **Gyroscope Therapeutics**, the retinal gene therapy company, occupies 27,000 sq ft at Rolling Stock Yard.

Developer, Stanhope, is planning to deliver 400,000 sq ft of 'lab enabled' space as part of the development of the site between The British Library and the Crick Institute. Further along Euston Road, developer LendLease is thought to be planning life science space as part of its redevelopment of Euston Station. Other projects planned or underway in the area include the following.

- **Grays Inn Road** In Spring 2021, Clearbell Property Partners announced the acquisition of 85 Gray's Inn Road a 28,000 sq ft office building, set across five floors. In a press release the company stated that it had acquired the building to meet the needs of the life sciences sector, and help address current supply constraints, particularly for wet labs.
- **Judd Street** Ashby Capital and Montrose Land acquired 105 Judd Street in 2021. The five storey 57,000 sq ft building will be redeveloped to create space aimed at companies in the life sciences sector and knowledge economy.
- **Brandon Road** Kadans Science Partner is redeveloping 5-10 Brandon Road as a 114,000 sq ft commercial centre, including high quality GMP manufacturing, laboratory and office space.
- **Euston Road** MSD ('Merck Sharp Dome' in the USA) is making a £1bn investment in a new 220,000 sq ft Drug Discovery and UK HQ facility on the Belgrove House site on Euston Road, opposite King's Cross station. The facility will be complete in 2025 and will employ 800 people.
- **Regent's Canal** Reef Group, with British Airways Pension Fund and Camden Council, is delivering what the firm's website describes as "*a 1m sq ft Life Science campus [comprising] laboratories and workspace along with complimentary restaurants and retail, united by new public realm and residential*". Sited on the Regent's Canal near St Pancras, the first phase of 112,000 sq ft will be complete during 2022.

Investor activity is also picking up.

- **Life Science REIT** bought a nine-storey office and laboratory building in York Way for £77m in December 2021. The 50,000 sq ft Rolling Stock Yard building, completed in March 2020, was sold by Newmark Properties, Argo Real Estate and Investec Bank. The building is 76% let (including Gyroscope Therapeutics) and the new owner will now seek to sign occupiers for the remaining vacant space.
- **Life Science REIT** bought 7-11 Herbrand Street in Fitzrovia for £85m in May 2022. The 67,000 sq ft building on four floors is occupied by UK fintech firm Thought Machine until October 2026.

Cluster 3: Southbank

The Southbank life sciences cluster in Southwark and Lambeth is branded as 'SC1 Innovation District', and is growing rapidly. Southbank is already home to the Cell &



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Gene Therapy Catapult at Guy's Hospital, the King's College AI Centre, the NHSX London office, and the Health Foundry, a co-working space for innovative companies in healthcare such as DrDoctor.

Snowsfields Quarter A partnership between Guy's and St Thomas' Foundation, with Oxford Properties and Reef Group, together with the London Boroughs of Lambeth and Southwark are bringing forward proposals to develop the Snowsfields Quarter near London Bridge. Global real estate investor and developer Oxford Properties and developer-operator Reef Group will invest around £350m to create a 300,000 sq ft life sciences hub with lab facilities across three new buildings. The site is adjacent to the Guy's campus which hosts world-class medical and research institutions including King's College London, and Guy's and St Thomas' NHS Trust. Together with Lambeth and Southwark, the consortium aims to create a new health and innovation cluster.

Royal Street Guy's and St Thomas' Foundation appointed developer Stanhope and Baupost development partners to bring forward a development on a 5.5 acre site opposite St Thomas' Hospital and close to Waterloo. The proposal offers the potential to provide an innovation cluster of companies, academic researchers and clinicians creating a new commercial neighbourhood in central London. The scheme will accommodate the Waterloo Health and Innovation Hub that will provide outpatient facilities, clinical support spaces, teaching and research spaces for collaboration with industry partners. Three further commercial buildings are planned that will provide space for larger businesses, SMEs and start-up space for businesses who wish to collaborate with King's Health Partners.

Vinegar Yard, London Bridge In May 2022, investor and developer CIT was given a green light for a 20-storey life sciences-led development at Vinegar Yard, which forms part of SC1. Designed by Kohn Pedersen Fox associates in collaboration with Guy's & St Thomas' NHS Foundation Trust and King's College London, it will provide a total of 370,000 sq ft of commercial space for NHS clinical uses, offices and life sciences research companies. It will include medical start-up incubator space and artists' studios managed by Southwark Studios.

Friars Bridge Court This 95,000 sq ft, 1980s office building was refurbished during the COVID-19 crisis and had been due to open as a WeWork serviced office building. Aberdeen Standard acquired the building and Munich-based international life sciences firm Synlab has replaced WeWork as the occupier. In Autumn 2020, Guy's and St Thomas' NHS Foundation Trust and King's College Hospital NHS Foundation Trust signed a 15-year partnership with Synlab for pathology services. Subsequently, Synlab announced says that a state-of-the-art 'hub' laboratory will be developed in the building. According to Synlab, the facility will become one of the largest purpose-built pathology laboratories in the UK, capable of processing around 70% of all pathology activity in the region.



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Lambeth In March 2022, a two-year life sciences entrepreneurship project part funded by Lambeth Council's Economic Resilience Fund was launched. Capital Enterprise and MedCity are expanding the life sciences cluster in Lambeth. The project comprises two accelerator programmes: the P4 Precision Medicine accelerator (supporting 40-50 early-stage businesses in progressing precision medicine technologies), and the CTA (which will support 45-50 business teams). The objective is to cultivate a life sciences cluster in Lambeth as part of the wider SC1 innovation district.

Cluster 4: Sutton

Further south, London Borough of Sutton, the Institute for Cancer Research (ICR) and the Royal Marsden Hospital have, for some years now, been collaborating to bring forward plans for a new life sciences campus, known as the London Cancer Hub. In 2015 a development framework was produced, which was endorsed by partners in 2016. Since then the Council has been acquiring land from Epsom St Helier University Hospitals NHS Trust, owner of the vacant hospital on the site, to bring forward the first phase of the London Cancer Hub, which aims to become the world's leading district for cancer research, treatment and commercial enterprise.

A focus for the ICR is the application of AI and data in oncology. Its researchers have developed the world's largest, public cancer drug discovery resource called 'canSAR'. The new resource is a huge integrative knowledge base which brings together billions of pieces of disparate experimental data across multiple disciplines – biology, chemistry, pharmacology, structural biology, cell biology – together with clinical information.

Sutton Council and Institute of Cancer Research partnership is seeking an investment partner for the next phase of the London Cancer Hub, which will have a GDV of £1.2bn. The 12-acre site, now owned by the council, has the potential for up to 1.1m sq ft of life science facilities. It will form part of a wider regeneration scheme which is set to create 3m sq ft of commercial workspace including offices, research leisure and hospital facilities.

In February 2022, it was announced that a new incubator and collaboration space for innovative life-science companies whose work is relevant to cancer would be opening, next door to the ICR's state-of-the art Centre for Cancer Drug Discovery. The Innovation Gateway offers laboratory, office and collaboration facilities. The Innovation Gateway contains around 6,300 sq ft of space, of which about 3,500 sq ft is set to be new laboratories. Facilities will include up to seven individual Category 2 labs, plus shared lab space, up to four company office spaces, a large hot desking area, break-out meeting rooms and kitchen facilities.

Cluster 5: West London

West London is now a leading destination for the biotech, digital and creative industries.

Imperial College London White City Campus In the heart of the area is the Imperial College research campus. The site began with the relocation of the



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university's Department for Chemistry from its South Kensington campus. The arrival of 800 world class academics, researchers and postgraduates at The Molecular Science Research Hub (MSRH) was pivotal, providing an underpinning to the emergent ecosystem. Subsequently Imperial College London has acquired more land, in the southern part of the site, to take their land holding to 23 acres.

The MSRH joined the Translation & Innovation Hub (I-HUB), with lab space and co-location opportunities for companies. The 190,000 sq ft I-Hub opened in 2016 is home to the Imperial Incubator which is 18,000 sq ft of space for life science start-ups and SMEs. The Michael Uren Biomedical Engineering Research Hub opened in 2019 to house over 500 engineers, clinicians and scientists. In addition to this will be the School for Public Health which Imperial is currently raising funds for.

The campus is also home to **Scale Space**. Established in 2017, Scale Space is a partnership between Imperial College and Blenheim Chalcot, and is planned to deliver a 200,000 sq ft technology and innovation centre on the south side of the Imperial site. The £50m development will provide space for new, high growth technology companies, and allow businesses can go from being in the Imperial incubator and to then scale-up on-site. The facility offers ready-to-occupy lab space, where the provider delivers a fully fitted product, with the capital costs of fit out reflected in a rental premium. Leases are also available on flexible terms. The labs range in size from around 500 to 1,000 sq ft. They are all built as Containment Level 2 labs, which covers a broad range of activities, including wet and dry lab work.

White City Place Situated very close to the Imperial Campus is White City Place – previously home to the BBC, now being transformed into a modern business environment. Led by Mitsui Fudosan, Cadillac Fairview and Stanhope, the campus offers space to creative, digital and life science firms. It has a considerable development pipeline, which is either directly targeted at life science companies or already lab enabled.

The ripple-effect from Imperial's Campus has included Autolus Therapeutics, a biopharmaceutical company specialising in T-cell therapies to treat cancer, which was able to more than double the size of its R&D space from 15,000 sq ft to 32,000 sq ft in White City Place's MediaWorks building. They were joined by Synthace, which uses AI to automate lab experimentation, and GammaDelta, founded by researchers from King's College London and the Francis Crick Institute, who are working on T-Cell cancer therapeutics.

The most recent addition is ADC Therapeutics, a Swiss oncology focused biotech company who announced their move to the I-HUB for summer 2021, to establish a new research centre with labs and office space. Global pharmaceuticals company Novartis also has its headquarters here.

Manbré Wharf In February Brookfield Arlington received planning approval for a 123,000 sq ft life sciences development in Hammersmith, west London. It is thought that the scheme, known as Refinery, will become one of the first

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fully lab-enabled buildings in London to be delivered by a commercial property investor. The development will offer “Biosecurity Level 2” labs as well as offices. It will be built alongside the Waterfront office scheme at Manbré Wharf on the River Thames.

There is scope for each floor to be fitted out for laboratory use. A fifth of the building will be dedicated to collaboration and amenity space, including an event studio, restaurant, club room and business lounge.

Cluster 6: Whitechapel

Located in east London, the Whitechapel cluster is focused on facilities operated by Queen Mary University of London (QMUL), Barts NHS Trust and the Royal London Hospital . In addition to the already successful Queen Mary Bioenterprises Innovation Centre (one of only three purpose-built commercial laboratory incubators in central London), the Queen Mary Enterprise Zone launched an innovation space dedicated to growing and scaling digital health, medtech and AI SMEs.

More strategically, there are emerging plans for a major, integrated life sciences cluster. In November 2021, the cluster received a significant boost when QMUL agreed a property deal with the Department of Health and Social Care (DHSC) that paves the way for the development of a state-of-the-art life sciences centre and supports DHSC plans for a Whitechapel Life Sciences Cluster. In February 2022 architects Allies and Morrison and Gibson Thornley have submitted plans for a huge medical research campus in Whitechapel, east London. The scheme will create a new life sciences cluster on five ‘underused and vacant plots’ between Whitechapel Road, New Road and Newark Street, next to the Royal London Hospital.

According to its backers, the project will bring forward ‘a long-held vision for many local institutions and stakeholders’ including Queen Mary University of London (QMUL) and Barts Health NHS Trust and will become home to a mix of life science and knowledge-related companies. The development is expected to create up to 5,660 full-time jobs when it completes in 2027.

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- ¹⁷ 3pm, Sheppard Robson, Hoare Lea, Turner & Townsend and Ramboll (2021) *Who Is the Science Occupier?* The British Council for Offices

