

Your location for Life Sciences in the UK

***“Where Essex leads, the
rest of the country follows”***

David Cameron, UK Prime Minister

INVEST
Essex

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Essex County Council

Why Essex?

Essex, the largest area in the East of England, is part of the London Stansted Cambridge Corridor. This is the largest life science cluster in Europe and a leading UK and European hub for . . .

- Research, development and manufacturing of medical devices
- Biotechnology
- Pharmaceutical products and preparation
- Research in natural science and engineering

Companies establish their operations in Essex to take advantage of five key benefits . . .

Size of the sector

293 companies in the Life Sciences sector in Essex¹.

Source: 1. Experian database

Supply of talent

Industry-specific workforce of nearly 5,000 in Life Sciences².

Essex has over twice the number of life science students as Cambridge, with 10,465 students enrolling each year in life science related courses compared to 4,560 in Cambridge.

Strong University-industry collaboration.

Source: 2. WAVTEQ based on Higher Education Statistics Agency

Superb access to UK and European markets

Part of the London Stansted Cambridge Corridor.

Direct proximity and access to London and Cambridge – both only 30 minutes away.

Excellent domestic transport links including rail (54 mainline stations and 8 underground stations) and road (M11, M25 and A12).

Access to European and global markets, with over 190 international locations served from our airports, more than Berlin, Copenhagen, Manchester, Milan, or Dublin.

Major cost savings

Up to 30% labour cost savings compared to Cambridge, Dublin, Frankfurt, London or Paris³.

Source: 3 WAVTEQ

Excellent location solutions

Major Life Science clusters in Chelmsford, Harlow, Southend and Great Chesterford.

Strong and growing supply of high quality office space.

Location

Not only is Essex located well for market access and service but it enjoys uniquely close proximity to both Cambridge and London with all the commercial and network benefits that exist.

London Stansted Cambridge Corridor (LSCC)

The LSCC offers well-balanced mixture of academia, infrastructure and sector specific talent and is a great location for Life Science companies.

There are 37 world class life sciences research institutes in the LSCC corridor, 1,400 Life Science businesses, accounting for 43,200 jobs and 19.6% of all national (England) employment in this sector.

With AstraZeneca's £330m global HQ moving to Cambridge and the £700m investment in the Francis Crick Institute at Kings Cross it is hard to over-emphasise the growing strength in Life Sciences in this corridor.

London Stansted Airport

Essex is also home to London Stansted Airport. The Airport is one of the largest cargo airports in the UK with direct deliveries to over 200 world-wide destinations. Cargo operators flying from Stansted include Fed Ex, TNT, UPS and Qatar Cargo matching the requirements of this project.

Harlow Enterprise Zone

The Harlow Enterprise Zone provides 35 acres (484,000ft², 45,000m²) of greenfield space in a prime location only 40 minutes from both London and Cambridge (linking academia and financial centres), and 15 minutes from London Stansted Airport.

Harlow has a rich history in industrial and technological activity. This will continue with the Enterprise Zone focussing on Life Sciences, ICT (information and communication technologies) and advanced manufacturing.

In support of the Government's Life Sciences strategy, the area was awarded Enterprise Zone status in 2011. This gives specific benefits to businesses establishing themselves in the enterprise zone . . .

- Business rate relief of up to £55,000 per year for five years
- Existing planning framework which means that planning permission is not required in most cases
- Fast tracking for provision of superfast broadband

Chesterford Research Park

Chesterford Research Park is an established Research and Development platform which houses significant names within the Cambridge Bio-Cluster, including Biofocus, Illumina and Takeda as well as a range of smaller occupiers including Isogenica, Diagnostics for the real world.

The Park has superb amenities, is well set within relaxed spacious surroundings and provides a high quality gated security entrance with a 24 hour manned presence on site.

Chesterford Research Park is located on the border of Essex and Cambridgeshire. It is only 14 miles from Cambridge city centre and it prides itself on being part of the Cambridge Bio-Cluster. It is also in the London-Stansted-Cambridge corridor, which houses the largest Life Sciences cluster outside of the US!



Main Image - Chesterford Research Park

An abundance of talent

Skills and education

Essex has 2 universities offering graduates with life science skills. The University of Essex is placed in all major university rankings including the Academic Ranking of World Universities 2013, The Times' World University Rankings 2013-2014, and the QS World University Rankings 2013.

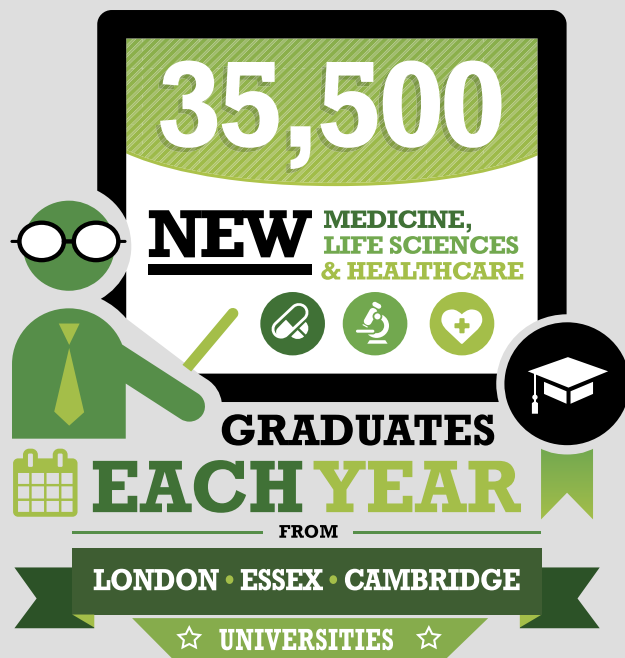
Essex has 10,465 students enrolled in life science related degrees each year – more than twice the number of Cambridge – giving investors access to a very strong talent pool.

World leading Universities in Cambridge and London provide a further pool of high quality graduates within 30 minutes of Essex. INVEST Essex works to provide linkages between universities and companies.

Best Brains in Britain

Research, development and innovation are cornerstones of Essex's business success story. Essex is part of the London Stansted Cambridge Corridor - the UK's innovation heartland.

It has four of the world's top ten universities for Life Sciences. The universities in Essex, Cambridge and London together provide 35,500 new medicine, Life Sciences and healthcare graduates each year.



A selection of life science related university courses offered in Essex

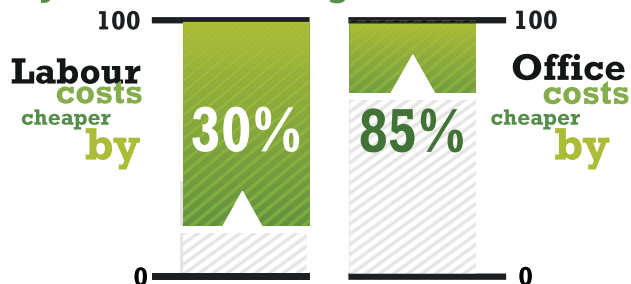
Course	University
Acute Care	Anglia Ruskin University (ARU)
Advanced Pre-Hospital Trauma Care	ARU
Biochemistry	The University of Essex (UOE)
Biological Sciences	UOE / ARU
Biomedical Science	UOE
Bioscience	ARU
Biotechnology	UOE
Cardiac Care	ARU
Cognitive and Clinical Neuroscience	ARU
Genetics	UOE
Health and Social Care	ARU
Health Care Management	ARU
Health Informatics	ARU
Healthcare Science	ARU
Medical and Healthcare Education	ARU
Molecular Medicine	UOE
Nursing	UOE
Occupational Therapy	UOE
Oral Health Science	ARU
Physiotherapy	UOE
Public Health	ARU
Therapeutic Communication and Therapeutic Organisations	UOE
Veterinary Nursing and Applied Animal Behaviour	ARU

Source: WAVTEQ based on university websites, 2014

Major cost savings

In comparison to other life science centres in the UK and Western Europe, Essex is up to 30% cheaper with regards to labour costs for a typical life science R&D centre, and up to 85% cheaper with regards to office costs.

Major cost advantages

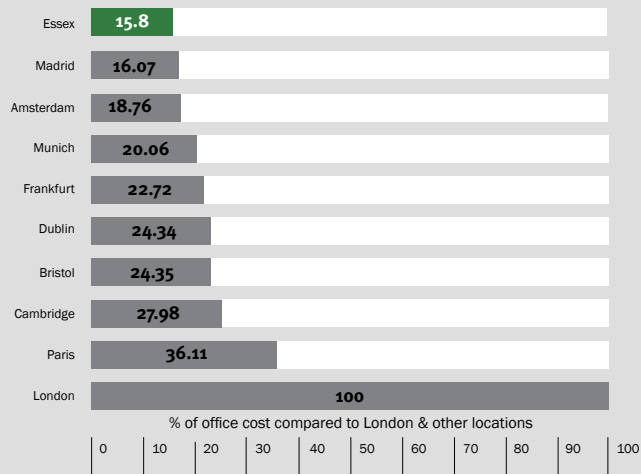


Labour cost comparison for a 25 person life science R&D centre, 2014 (London =100).



Source: WAVTEQ 2014

Office cost comparison, 2014 (London = 100)



Source: WAVTEQ 2014

Access to European markets

Many life science companies cite transportation links as a key reason for establishing their business in Essex. Essex is home to two major airports; the UK's 4th largest airport, London Stansted and one of the UK's most recently developed, London Southend.

It is also on the doorstep of London City, only 30 minutes by train, and within an hours drive of London Gatwick and London Heathrow.

Location of Essex - showing airports - London Stansted and London Southend - and proximity to London.



Number of direct international destinations served (2014)

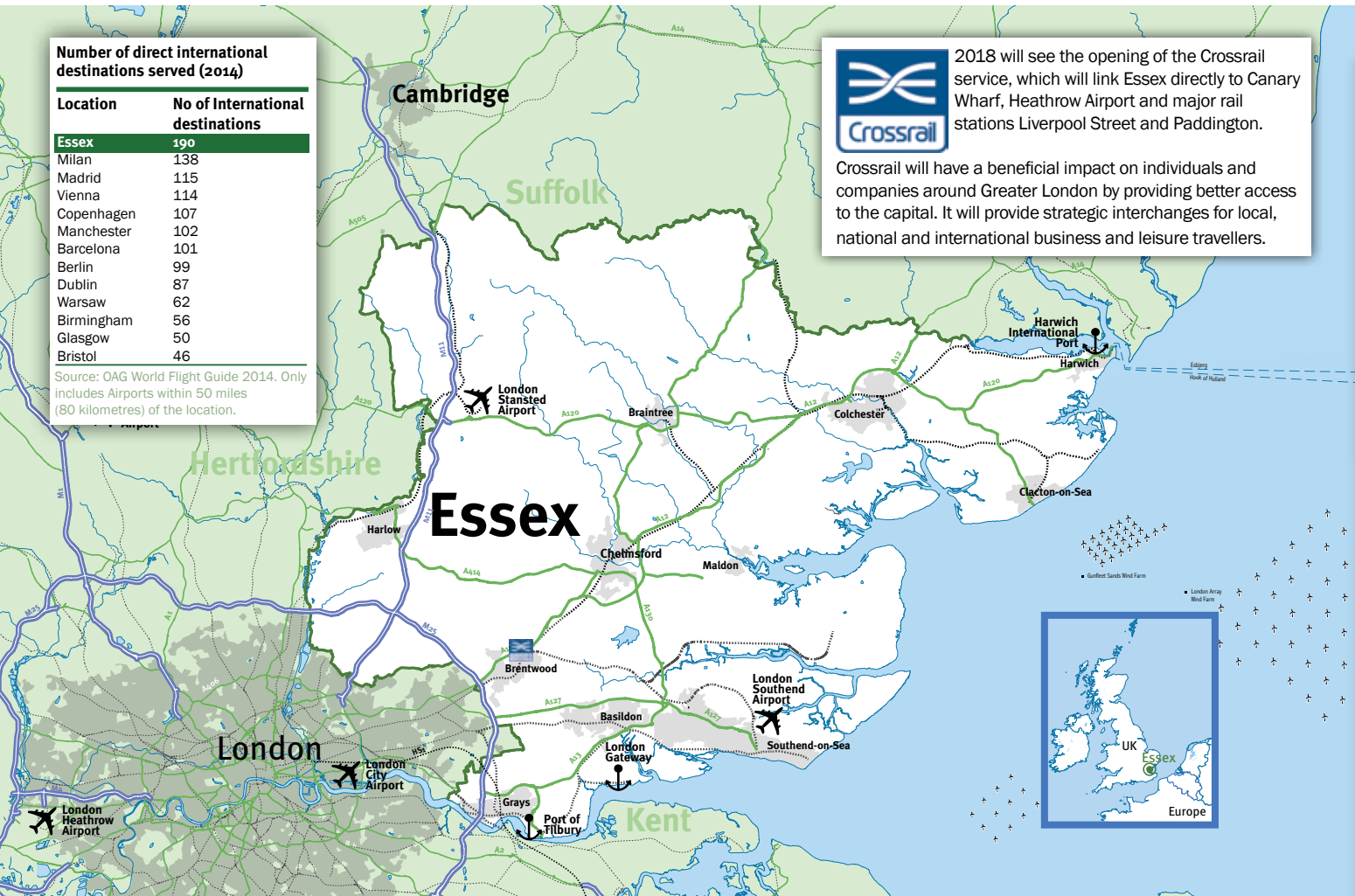
Location	No of International destinations
Essex	190
Milan	138
Madrid	115
Vienna	114
Copenhagen	107
Manchester	102
Barcelona	101
Berlin	99
Dublin	87
Warsaw	62
Birmingham	56
Glasgow	50
Bristol	46

Source: OAG World Flight Guide 2014. Only includes Airports within 50 miles (80 kilometres) of the location.



2018 will see the opening of the Crossrail service, which will link Essex directly to Canary Wharf, Heathrow Airport and major rail stations Liverpool Street and Paddington.

Crossrail will have a beneficial impact on individuals and companies around Greater London by providing better access to the capital. It will provide strategic interchanges for local, national and international business and leisure travellers.



Excellent location solution

Essex has many high quality research parks and innovation centres for Life Sciences companies, including . . .

Chesterford Research Park

The Park offers . . .

- A range of units starting from 1,515 sq ft (141 sq m) that can be combined for organisations that are growing within the building
- Provides a high quality gated security entrance with a 24 hour manned presence
- Access to Cambridge within 20 minutes by rail and road
- Access to Central London within 1 hour by rail and road.
- Central facility known as The Nucleus which offers restaurant, gym and meeting room facilities
- An on-site golf course!



The MedBIC Business Innovation Centre for Medical and Advanced Engineering

The MedBIC is centrally located in Chelmsford, a new city that is home to 12,000 businesses. The MedBIC is much more than an innovation hub or science park; it is made for start-ups and early-stage businesses in medical and advanced engineering industries. The Business Innovation Centre is purpose built to speed commercial ideas to market and nurture fledgling ventures by providing all the resources, expertise and support required in a single building.

The centre offers . . .

- A choice of workspace options and packages with 24/7 access
- Engineering laboratories and workshops on site
- Anglia Ruskin University campus facilities on your doorstep
- Business and technical support available
- A community of like-minded, ambitious people



Pre-let development opportunities

The Anglia Ruskin MedTECH Campus sites, in Chelmsford, Harlow and Southend-on-Sea, will be delivered by the private sector with the active support of local partners. First site development has taken place in 2014. With some 120 acres of land set aside the Anglia Ruskin MedTech Campus will be able to:

- Accommodate up to 1.7 million ft² (158,000 m²) of floorspace for MedTECH and ancillary businesses. This will also accommodate planned innovation centres for SMEs and a dedicated Anglia Ruskin MedTECH Business Support Service
- Lever in around £500m of private sector site-related investment.
- Help grow the UK MedTECH turnover for the sector by £1.2 billion (some 8% of the current UK total) and generate up to 12,500 jobs
- Establish Essex as a global MedTECH centre



What companies are saying about Essex

"Collaboration with the international research community is an important part of our business. Essex is conveniently situated for a team that is very mobile. We find that having London Stansted Airport and London Heathrow Airport so close by is important"

Sandy McBean, General Manager Europe, Illumina

"Essex has a good mix of the right skills and experience, so we are able to meet our recruitment needs locally. We also find that the colleges in the area are a good source of apprentices for the future."

Anthony Knight, Finance Director, Martindale Pharma

"We market our products throughout the world, that means a great deal of travelling for our staff. Our sales and marketing teams are regularly visiting customers or training users in the field. The proximity of London Stansted Airport makes it very convenient to conduct a global business like ours."

Achel Shenoy, International Sales Manager, Clement Clarke International

"We are fortunate that Essex, with its electronics and manufacturing heritage, has an established pool of high-tech skills so we are able to tap into the local labour market. There is a good network of training schools and colleges which we can use as part of our continuous staff development programme."

Mark Jackson, Head of (Manufacturing) Business Development, Olympus KeyMed

Major investors in Essex . . .

CellCentric

HS CLEMENT CLARKE
INTERNATIONAL

OLYMPUS

Your Vision, Our Future

illumina®

charles river

isogenica

MARTINDALE PHARMA

Contact INVEST Essex

INVEST Essex provides free business growth and research support, property searches and solutions, assistance in establishing networks, guidance on alternative sources of finance, and recruitment linkages.

We act as a single point of contact to help identify the right contacts in local government to address infrastructure, utilities, transport networks, planning and other start-up/operational issues.

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