

Young Planners' Conference

**Connecting Town and Country:
Planning for Urban and Rural Areas**

11 – 12 October 2024 #YPCConf2024





RTPI
Royal Town Planning Institute

BREAKOUT 4

Importance of Clusters to the Life Science Sector and the Changing Dynamic between City and Campus

Guy Kaddish - Partner, Planning, Bidwells

Mark Callendar - Research Partner, Bidwells

Philippa Kelly - Strategic Sites Manager, Greater Cambridge Shared Planning Service

Edward Crooks - Architect, Hawkins Brown

Chair: Sophia Nitschke - Planner, Bidwells LLP

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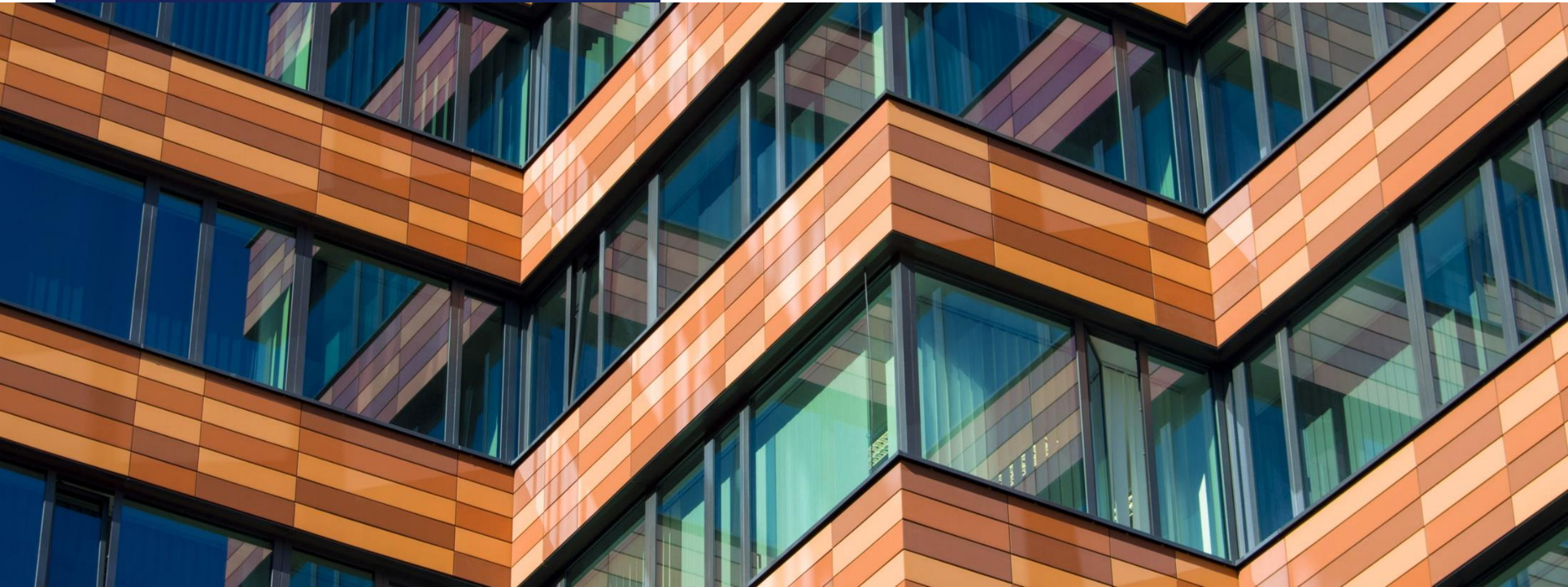


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11th October 2024



IMPORTANCE OF CLUSTERS TO THE LIFE SCIENCE & TECH SECTORS AND THE CHANGING DYNAMIC BETWEEN CITY AND CAMPUS

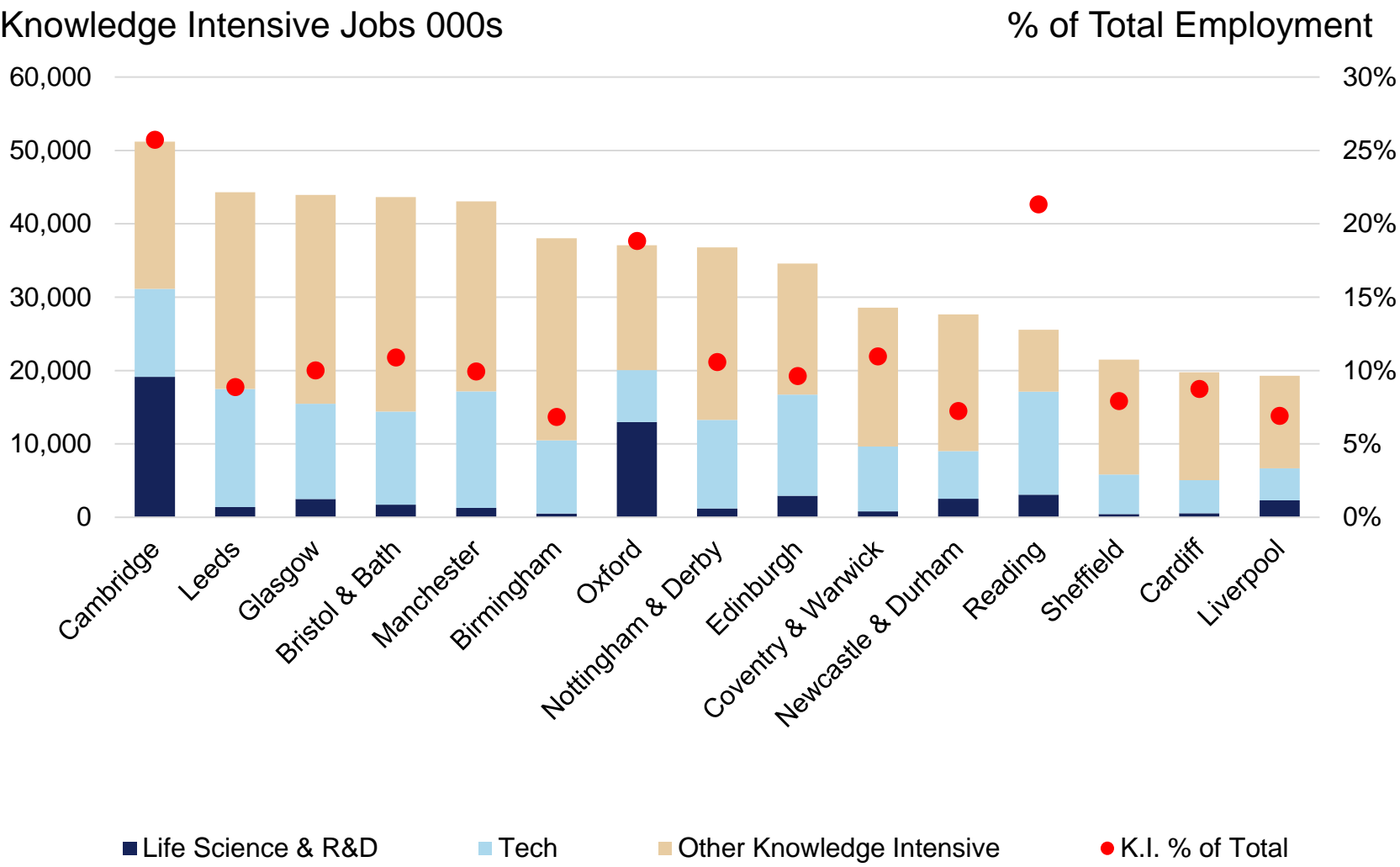


CLUSTERS

A spatial concentration of businesses which are focused on the same activity, innovative and collaborative.

Source: Bidwells.

CAMBRIDGE SCIENCE & TECH CLUSTER



51,000 Jobs in Fast Growing, Knowledge Intensive Industries



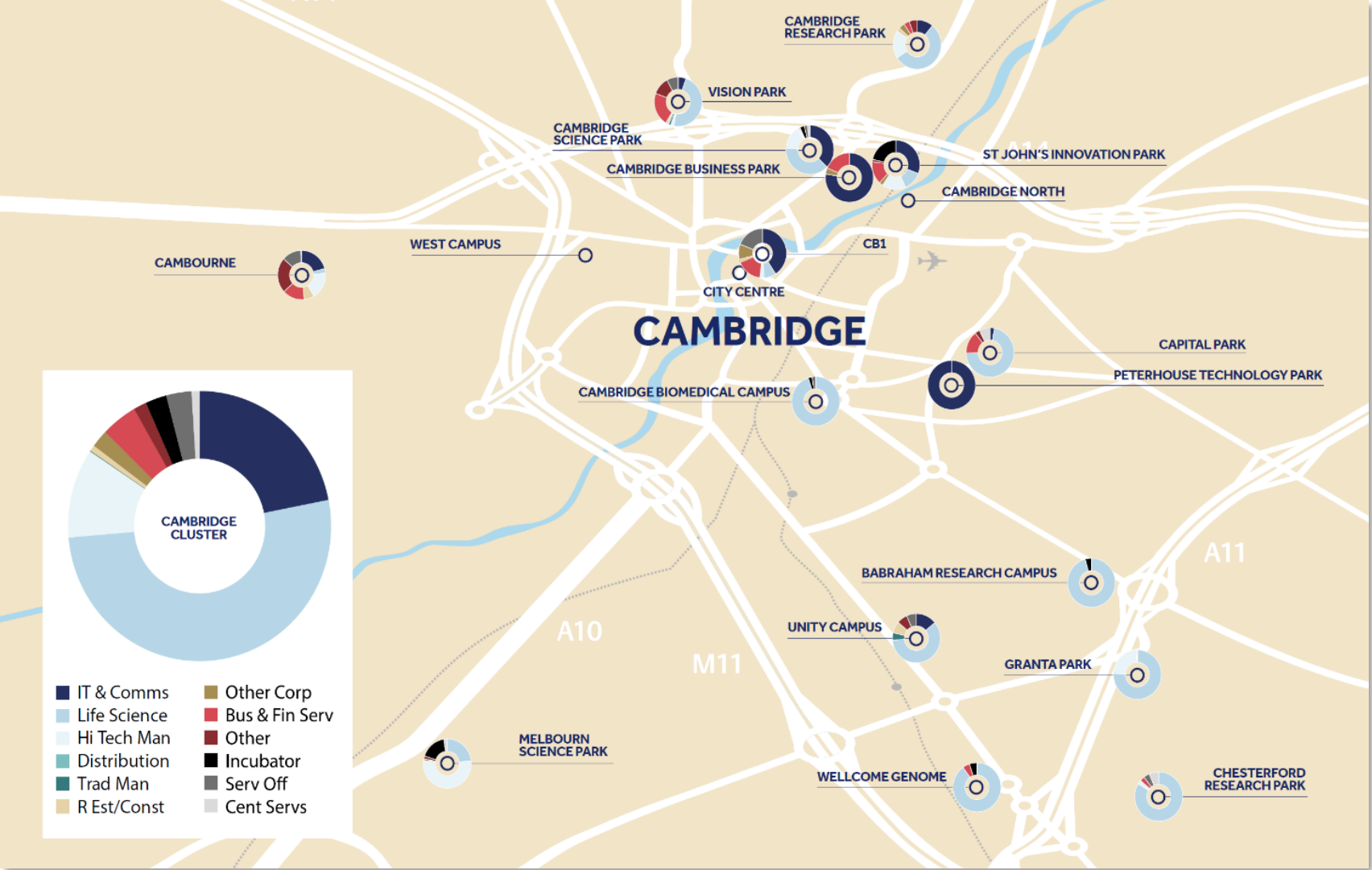
Major Science & Tech Employers

Abcam, Arm, AstraZeneca, Darktrace, Microsoft, Samsung

428 Active Start-Ups & Scale Ups (2024)

Source: Bidwells, Beauhurst, Cambridge Ahead, NOMIS. 2023. Note Knowledge Intensive jobs exclude higher education, financial and professional services.

CAMBRIDGE OFFICE & LAB LOCATIONS



Source: Bidwells. 2023.

GLOBAL UNIVERSITY RANKINGS & INNOVATION

Times World University Rankings

Rank 2024	Rank 2023	Institution
1	1	University of Oxford
2	=3	Stanford University
3	5	Massachusetts Institute of Technology
4	2	Harvard University
5	=3	University of Cambridge
6	7	Princeton University
7	6	California Institute of Technology
8	10	Imperial College London
9	8	University of California, Berkeley
10	9	Yale University

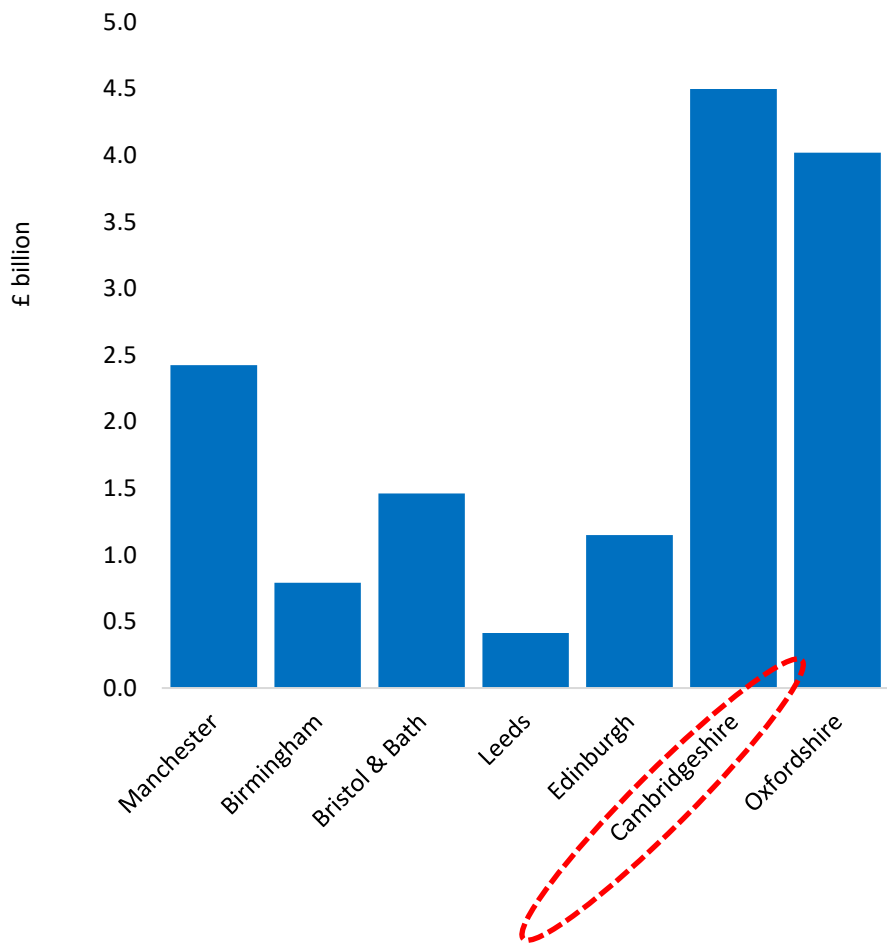
Innovation per capita

Rank per capita	Cluster name	Economy	Top applicant
1	Cambridge	GB	ARM
2	San Jose–San Francisco, CA	US	Google
3	Eindhoven	NL	Philips Electronics
4	Oxford	GB	Oxford University
5	Boston–Cambridge, MA	US	MIT
6	San Diego, CA	US	Qualcomm
7	Daejeon	KR	LG Chem
8	Ann Arbor, MI	US	University of Michigan
9	Seattle, WA	US	Microsoft
10	Munich	DE	BMW

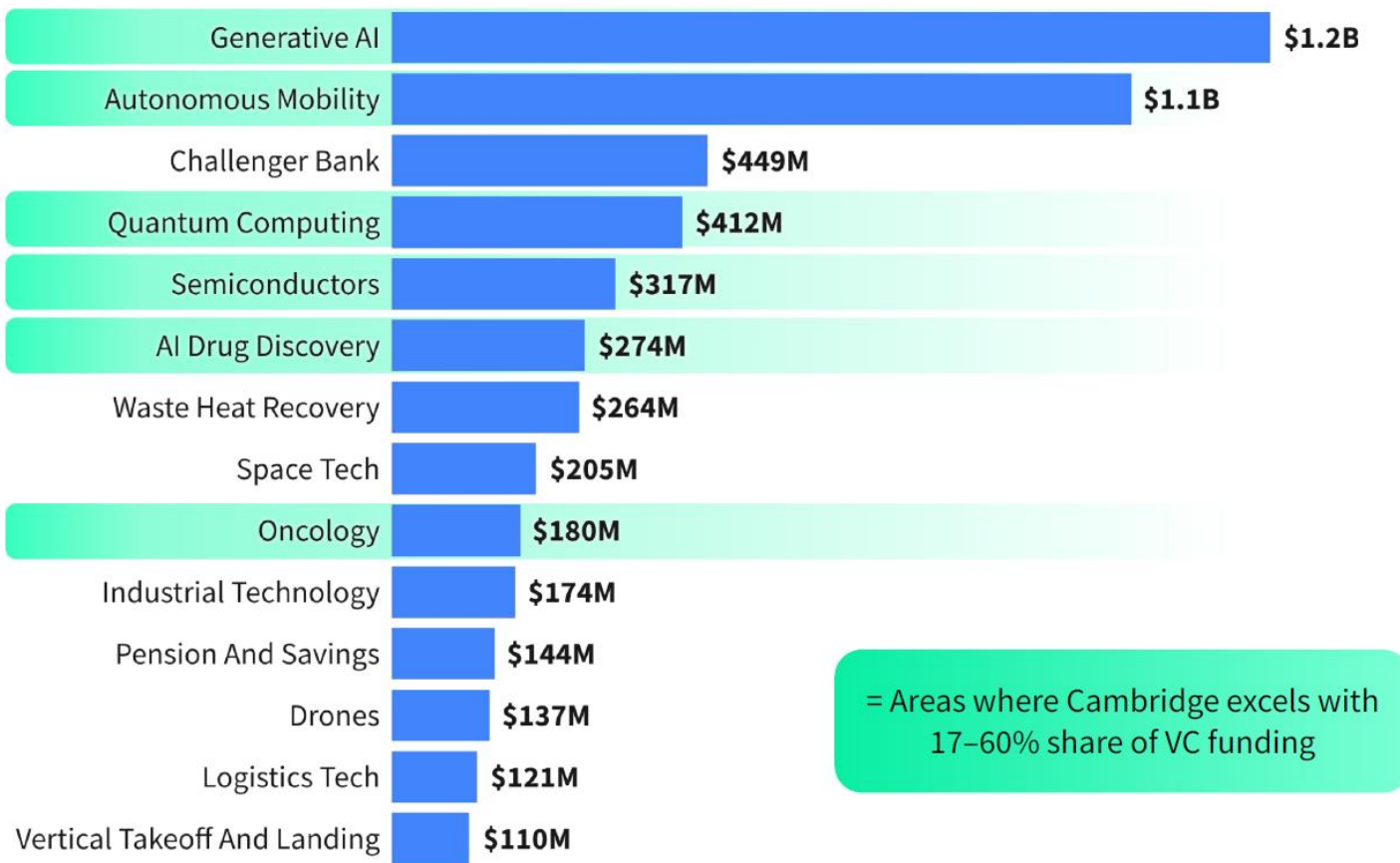


UNIVERSITIES GROWING INCOME FROM LICENSING INTELLECTUAL PROPERTY

Venture Capital Fund Raising, 2019-2023



UK Venture Capital Fund Raising – 2024 H1

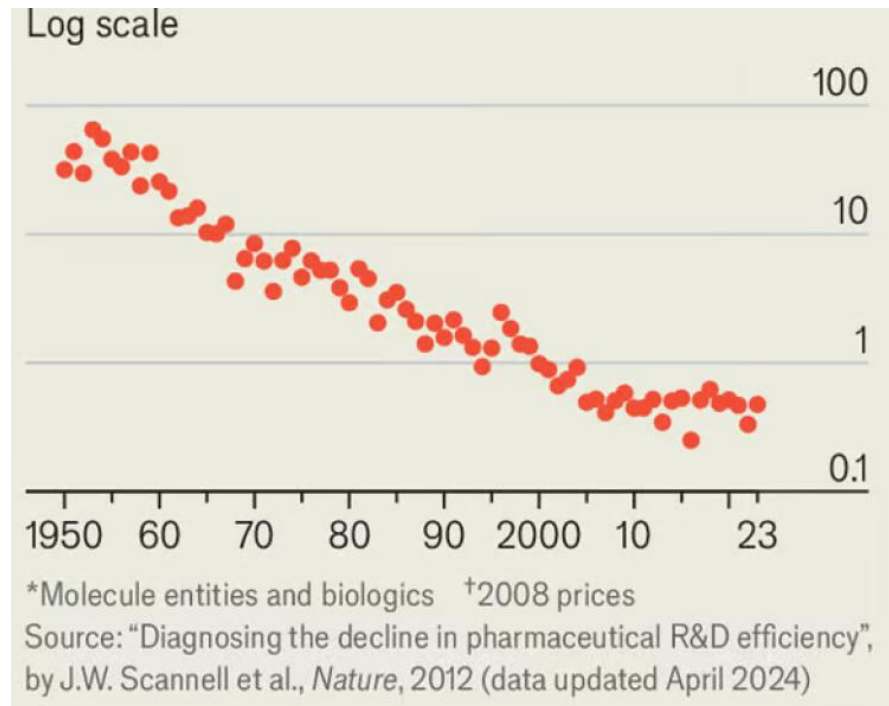


= Areas where Cambridge excels with 17-60% share of VC funding

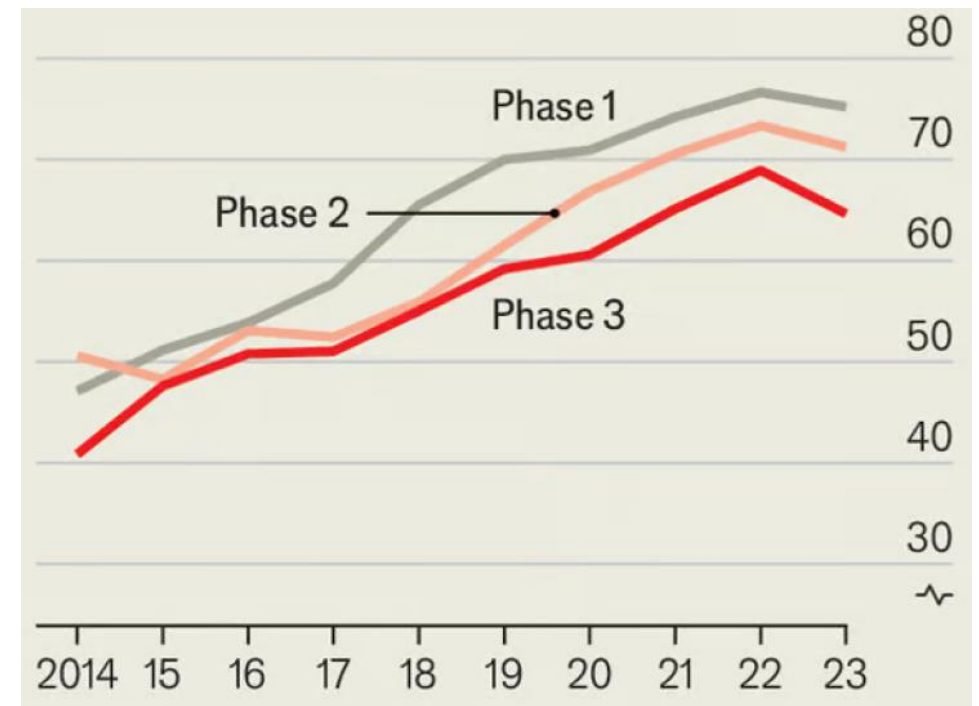
Source: Beauhurst, Dealroom. July 2024.

DIMINISHING RETURNS FROM IN-HOUSE RESEARCH MEANS BIG-TECH AND LIFE SCIENCE COMPANIES NEED TO COLLABORATE WITH UNIVERSITIES & SPIN-OUTS

**Number of Drugs Approved by FDA
per \$1 billion of R&D, 2008 Prices**



**Small* Bio-Tech Companies
% of Global Clinical Trials**



Source: The Economist, IQVIA 2023 Q4. *Small defined as bio-tech companies with annual sales < \$5 billion.

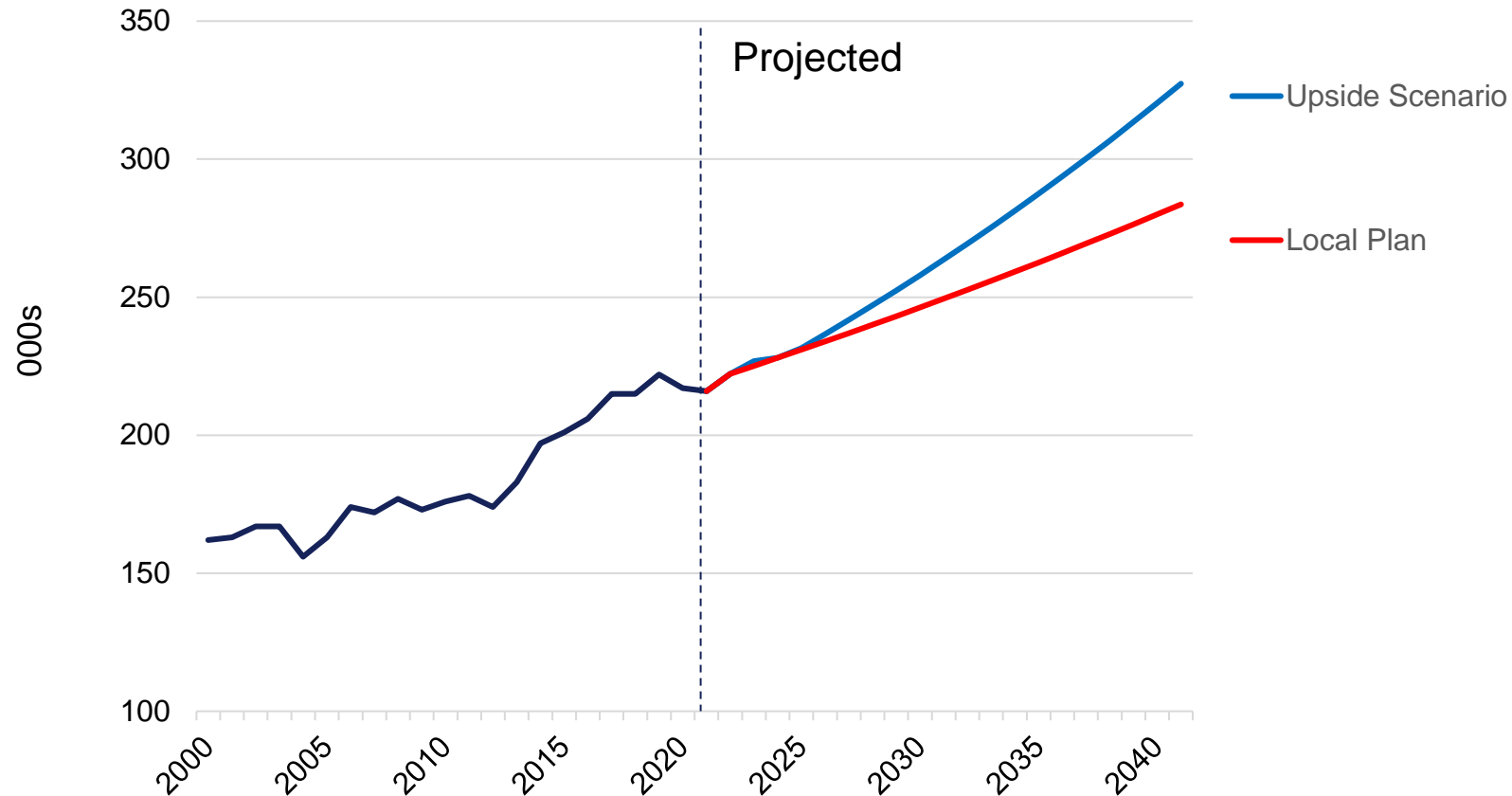
AN ATTRACTIVE CITY WITH GOOD AMENITIES



Source: Bidwells. July 2024.

POTENTIAL FUTURE GROWTH

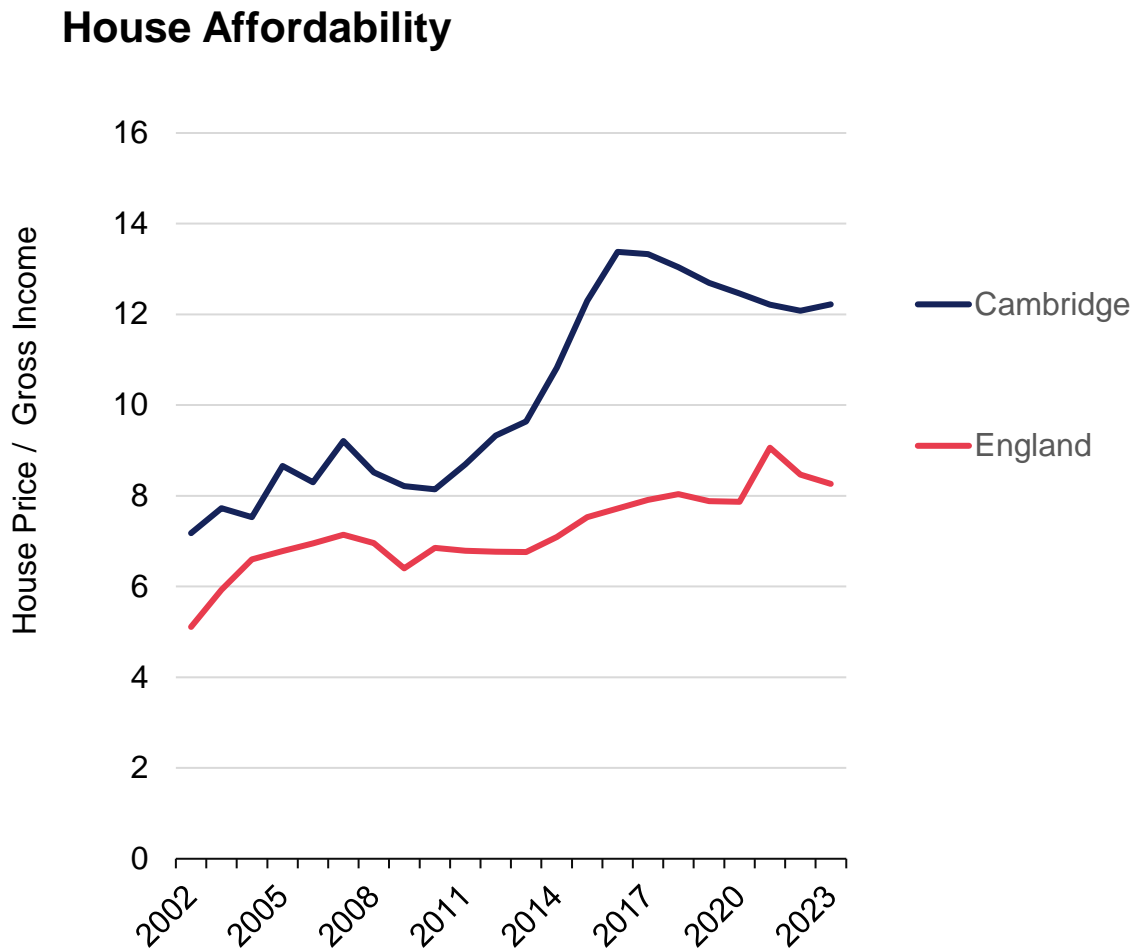
Cambridge & South Cambs Employment



- The medium level growth scenario in the Greater Cambridge Local Plan Development: Strategy Update (Jan 2023) recommends the provision of an extra 66,600 total jobs between 2020-2041.
- The Upside Scenario which assumes growth at the same rate as 2010-2021 projects an extra 110,000 jobs between 2020-2041.

Source: Bidwells, Greater Cambridge Local Plan, Homes England, NOMIS. September 2023..

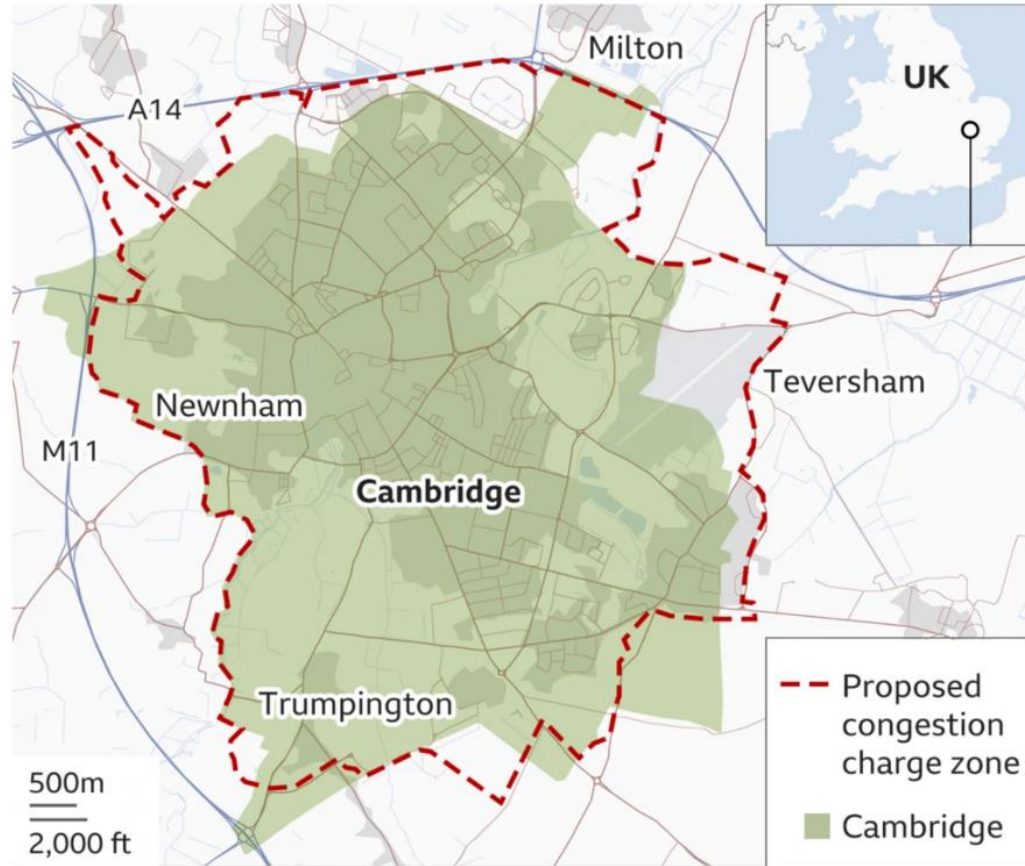
GROWING PAINS (1) – HOUSING SHORTAGE



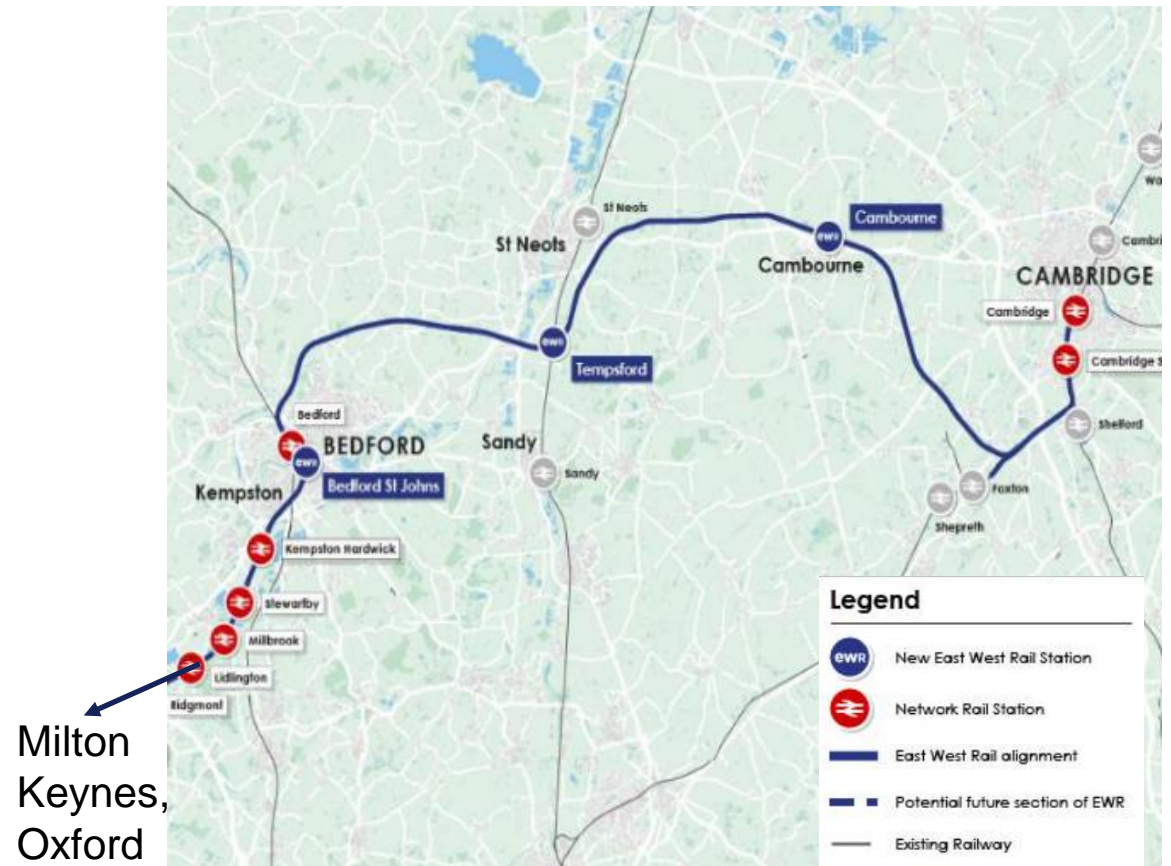
Source: Bidwells, ONS, Varbes. April 2024.

GROWING PAINS (2) – TRAFFIC CONGESTION

Cambridge Congestion Charge Proposal



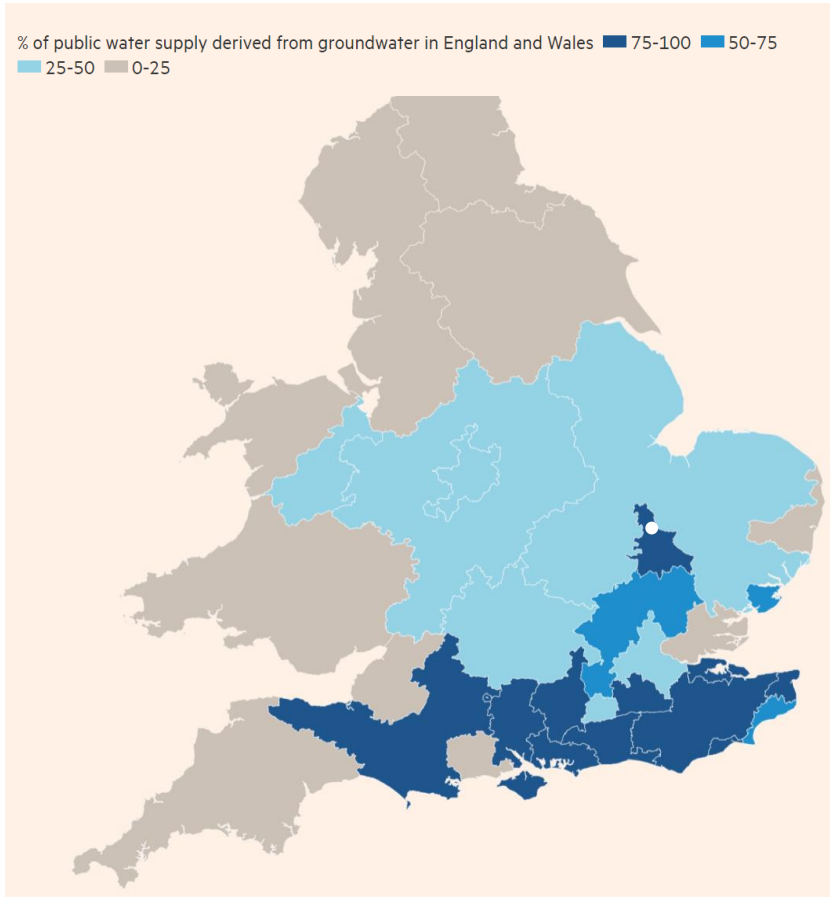
East West Rail



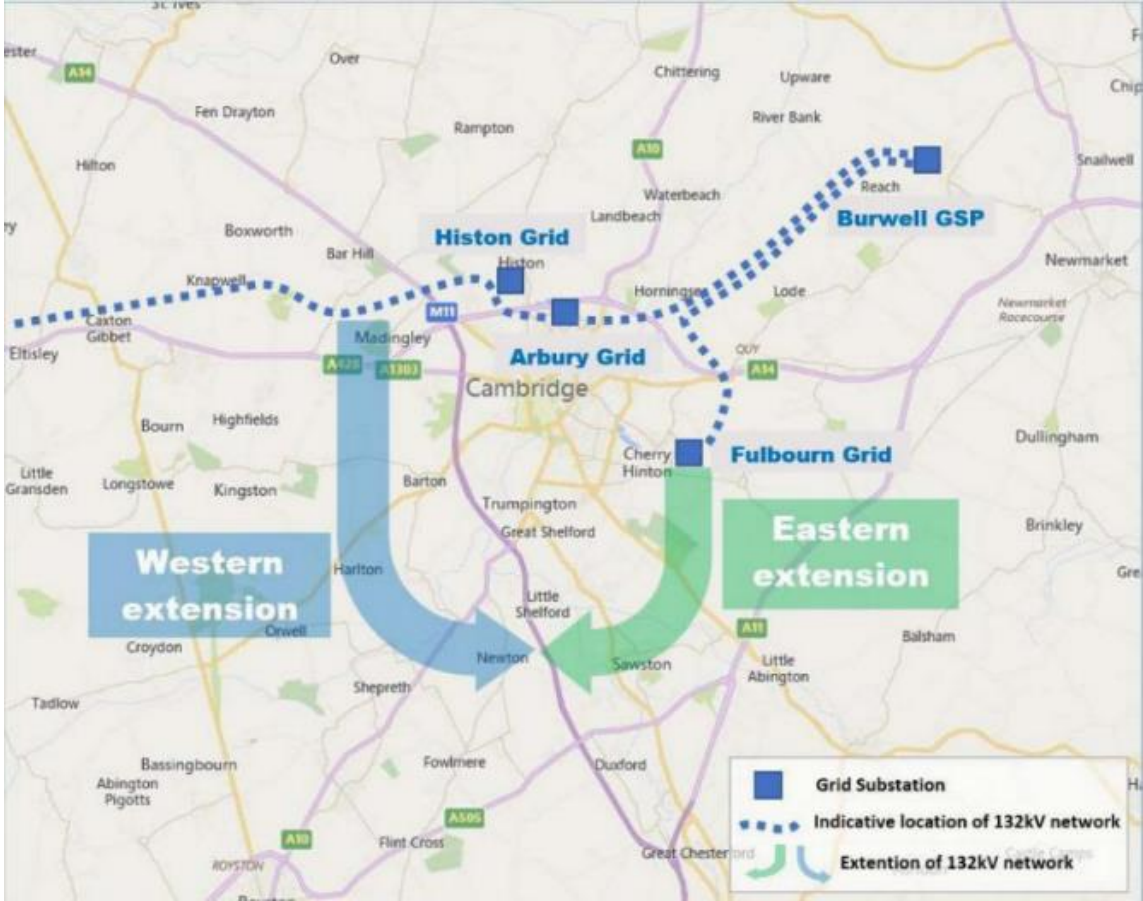
Source: Bidwells, East West Rail, Greater Cambridge Partnership. July 2024.

GROWING PAINS (3) – WATER & POWER CAPACITY

Reliance on Water from Aquifers



Upgrades to Cambridge Electricity Grid



Source: Bidwells, British Geological Survey, FT, .Greater Cambridge Partnership. September 2024.

CONCLUSIONS

The challenge facing Cambridge is not how to boost the economy, but how to deliver sufficient housing and infrastructure that it can fulfil its huge potential while simultaneously preserving the historical city centre and surrounding countryside.

The UK government recognises Cambridge as essential to national economic growth, innovation and leadership in science.



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Q&A

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