

Life Sciences & Healthcare 2017



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Introduction

Thames Valley Berkshire is home to a long-established life science and healthcare cluster. Located firmly within the wider 'golden triangle' of UK life science activity, the presence of global leaders, innovators, strong networks, academic excellence and talent, along with outstanding locational advantages, suggests that despite the uncertainties created by the UK's vote to leave the EU, the future remains bright. Indeed, the last 12 months have seen more global players move operations to Thames Valley Berkshire, and the opening of the Thames Valley Science Park in 2017, with its flexible offer of office and laboratory space, looks set to attract more research activity, in addition to head office functions, in the future.

Thames Valley Berkshire's life science and healthcare ecosystem



Opportunity Thames Valley Berkshire

The Thames Valley Berkshire Powerhouse

Thames Valley Berkshire (TVB) is the UK's highest performing local economy outside of London. It is ranked second only to London in terms of its economic output (Gross Value Added), workforce productivity and the proportion of firms 'scaling-up'.

Located within the South East of England's life sciences 'golden triangle', and on the M4 knowledge industry corridor (home to many leading tech firms), it is a hugely popular business location for international corporates.

Many leading life science and healthcare companies have their headquarters, manufacturing and/or R&D functions in Thames Valley Berkshire.

The area has strong university research in clinical sciences and life sciences (at The University of Reading, Imperial College – Berkshire campus, and at the nearby University of Oxford, Oxford Brookes University and Royal Holloway University).

Quick reference

- Within the UK's life sciences 'golden triangle' and on the M4 corridor
- Strong mix of global and smaller life science companies
- Location of choice for HQs, R&D and manufacturing
- World-leading university research

Location



South East of England golden triangle

World-leading cluster

The South East of England golden triangle is a world-leading life sciences cluster. Thames Valley Berkshire sits within the triangle, which stretches from Oxford to Cambridge and London.

The cluster is a rich network of leading life science companies, renowned research centres, healthcare providers and medical charities, all based within a compact and well connected geographic area.

Innovation

The cluster is a hotbed of innovation, home to:

- Four of the world's top 10 universities
- Five of the six UK Academic Health Science Centres
- Leading medical research institutes including the Wellcome Trust, the Medical Research Council, Cancer Research UK and the national Cell Therapy Catapult.

The region offers an ideal base for clinical trials, will a highly diverse patient population of over eight million, served by the National Health Services – a large single healthcare system that can facilitate access to extensive data.

Support

MedCity (<http://www.medcityhq.com/>) offers a portal for those looking for academic, healthcare or business partners, research infrastructure, office and incubator space; or guidance through tax and regulatory processes in the South East area.

Quick reference

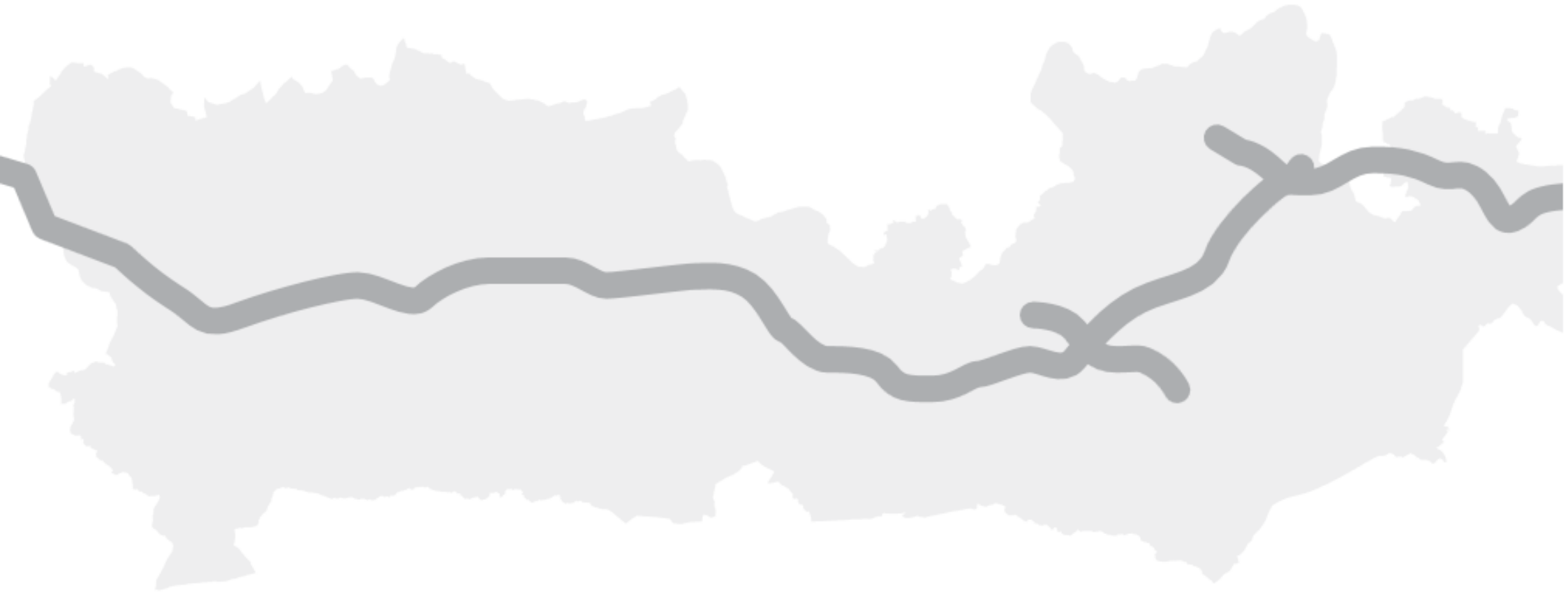
- The South East of England has the highest concentration of life science companies and employment in the UK
- Four of the world's top 10 universities
- Five UK Academic Health Centres
- Leading medical research institutes

The M4 Corridor

Thames Valley Berkshire is also located on the M4 Corridor, which stretches from Heathrow Airport in the east to Bath and Bristol in the West.

Land along the M4 Corridor is often low cost in comparison with nearby urban locations.

Major life science and healthcare companies located along or adjacent to the Corridor include Stryker (Newbury), Baxter (Newbury), Bayer (Newbury – moving to Reading), Quintiles (Reading), PRA International (Reading), Shire (Basingstoke), Boehringer Ingelheim (Bracknell), 3M (Bracknell), Allergan (Marlow), Lonza (Slough), Reckitt Benckiser (Slough), UCB Pharma (Slough), GSK (Brentford / Maidenhead), Covance (Maidenhead) and Parexel (Uxbridge).



Life sciences and healthcare companies located in Thames Valley Berkshire

Biopharmaceutical core

Abbott Laboratories Ltd
Abbott Healthcare Products Ltd
 Abbvie Ltd
 Baxter Healthcare Ltd
Bayer Plc (HQ)
Boehringer Ingelheim Ltd
Genus Pharmaceuticals Ltd
GSK
Ipsen Ltd
Pfizer (Wyeth Europa Ltd)
Pierre Fabre
Reckitt Benckiser (HQ)
 Sanofi Pasteur MSD
UCB Pharma Ltd
Vernalis Development Ltd

***12 in bold operate in the Small Molecules segment**

Biopharmaceutical Service & Supply

Apodi
Covance Laboratories Ltd
 Hichrom Ltd
InventivHealth
Lonza Biologics Plc
 Molecular Devices Ltd
ORION Clinical Services Ltd
 Pharmexx
Pharm-Olam International
PRA International
Premier Research Group Ltd
Quintiles Clinical Services
Quintiles Commercial Services
Quintiles Ltd
 Rssl

***10 in bold are Clinical Research Organisations**

Medical Technology core

Abbott Medical Optics
 Hollister Ltd
 Hospedia Ltd
 Intersurgical Ltd
 KEELER Ltd
 Menarini Diagnostics
 Stryker UK Ltd
 The Vision Care Institute

Source: Strength and Opportunity 2015, the UK Medical and Biopharmaceutical Landscape, BIS (firms with 50 plus employees listed)



Who's here?

Market leaders

Over 135¹ medical technology and biopharmaceutical companies have a base in Thames Valley Berkshire; many of them are world-leaders in their field.

Of the 10 leading pharmaceutical companies in terms of UK market share², two (AbbVie and Boehringer Ingelheim) have their HQs in TVB, a further three (Pfizer, GSK and Johnson & Johnson) have operations in the area, and the remaining five (Novartis, Roche, Merck and Co, Sanofi, and AstraZeneca) all have HQs within two hours of the sub-region.

Companies with their global headquarters in Thames Valley Berkshire include: Reckitt Benckiser (Slough), Sigma-Tau Rare Disease (Windsor) and Intersurgical (Wokingham).

The following maps provide detailed information about life science companies and related organisations based in Thames Valley Berkshire and the surrounding area.

MedCity - www.medcitymap.com

Oxford AHSN - <http://www.oxfordahsn.org/about-us/infrastructure-map/>

R&D

Companies with R&D or manufacturing operations in Thames Valley Berkshire include: Lonza (Production, Research & Development), UCB (Biologics R&D Centre, Immunology Research Hub), 3M, AbbVie, Covance, Otsuka Pharmaceutical Europe Ltd, Intersurgical, Bayer, PRA International, GSK (manufacturing sites for consumer products) and Johnson & Johnson Medical (Vision Care Institute).

Recent inward investment

Foreign-owned life science and healthcare companies that have expanded or started operations in Berkshire in the last three years include: Boehringer Ingelheim, Kosei Pharmaceuticals, Sigma-Tau, AliveCor, AbbVie, Karl Storz, Renew Medical, CROS NT, Hospira, Hebei Yiling, Abbott Molecular, Seqirus and Becton Dickinson.

Approximately half of all foreign-owned life science and healthcare companies moving into or expanding within TVB in recent years were from the US; the remainder being from Europe, Asia and Australia.

Investments in the area were from companies of a range of sizes: global corporates to SMEs.

Quick reference

- Thames Valley Berkshire is home to approximately 135 medical technology and biopharma companies, many of whom are world-leaders
- Five of the top 10 pharma companies in the UK have operations in TVB
- Many market leaders have R&D or manufacturing operations in TVB
- 20 foreign-owned life science and healthcare companies have expanded or started operations in Thames Valley Berkshire over the last three years

¹ The methodology used to collect company data for this report has changed from the previous year. Therefore the headline numbers cannot be compared like-for-like.

² Source: IMS Analysis Manager [accessed February 2015]

Location of major players

Those with R&D or manufacturing operations are highlighted in **blue**



Research and development

University research activity and impact

Academic research in clinical and life sciences in and around Thames Valley Berkshire is strong. Within TVB, research is undertaken at the University of Reading and Imperial College (Berkshire). To the north of TVB, the University of Oxford has world renowned research excellence in Clinical Sciences and Life Sciences, and Oxford Brookes University attracts healthcare tech research funding.

University of Reading

Examples of the University of Reading's expertise include:

- The Centre for Integrative Neuroscience and Neurodynamics (CINN)
- The Centre for Applied Behavioural Science
- The Institute for Cardiovascular and Metabolic Research (ICMR)
- The Winnicott Research Unit (Child Development)
- The Charlie Walker Institute
- Chemical Analysis Facility
- Psychology and Clinical Language Sciences

The University has applied for planning permission to build a 5-storey health and life sciences centre as part of the redevelopment of its Whiteknights campus.

The University is a member of the Healthcare Infrastructure Forum, a four-way collaboration between Imperial College London and the universities of Loughborough, Salford and Reading, which is the only international centre dedicated to improving healthcare delivery by focusing on infrastructure.

University of Oxford

On the doorstep of Thames Valley Berkshire, the University of Oxford is a world-class establishment. The Times Higher Education survey ranks the university 1st in the world for life sciences.

Oxford Brookes University

Oxford Brookes University also has a strong reputation for life sciences and health research. It has two related research centres: the Centre for Rehabilitation and the Institute for Public Care Market Analysis Centre. The majority of the university's life sciences and healthcare research was judged to be world leading or internationally excellent in the latest Research Excellence Framework (REF).

Imperial College, London

Imperial College London is a science-based university with an international reputational for excellence in teaching and research. Consistently rated one of the world's best universities, Imperial is committed to developing the next generation of researchers, scientists and academics through collaboration across disciplines.

Royal Holloway, University of London (Surrey)

With strong links to industry, the University has research expertise in bioinformatics, bio-diagnostics, biological sciences & health and wellbeing.

Networks and collaboration

Oxford Academic Health Science Network (AHSN)

The Oxford AHSN was licensed for five years by NHS England in 2013. It covers Berkshire, Buckinghamshire, Milton Keynes, Oxfordshire and Bedfordshire.

It aims to bring together universities, industry and the NHS in the area to improve health and prosperity through rapid clinical innovation adoption.

It has four major work programmes supported by three themes; these are set out below.

Oxford AHSN Work Programmes:

1. Best Care
2. Clinical Innovation Adoption
3. Research & Development
4. Wealth Creation

Oxford AHSN Themes:

1. Informatics
2. Patient and Public Involvement, Engagement and Experience
3. Patient Safety

Wealth Creation Programme

Oxford AHSN's Wealth Creation Programme includes:

1. Help to access capital and support through schemes such as the Small Business Research Initiative (SBRI)
2. Access to angel investors and venture capital groups
3. Ties to Oxford Science Innovation (OSI)
4. Access to networks and expertise
5. Help for companies to growth and access home markets

Further information is provided here:

www.healthandwealthoxford.org

Networks and collaboration

NHS Innovations South East (NISE)

NISE (based to the north of TVB in Harwell, Oxfordshire) provides services to NHS bodies in relation to the exploitation of all potential and actual IP, and facilitates technology transfer.

NISE industry engagement consultancy services cover a wide range of activities designed to support companies in the development, adoption and diffusion of innovative healthcare solutions. These include:

- Opportunity Analysis
- NHS Market Access
- Innovation Networking
- Issue Identification
- Concept Creation
- Pre-procurement Support
- Stakeholder Analysis
- Legal Services
- Intellectual Property (IP) Management

The Cumberland Initiative

The Cumberland Initiative (based at the Cumberland Institute in Slough) aims to transform the quality and cost of NHS care delivery through simulation, modelling and systems thinking. It is a collaboration of universities, the NHS and commercial organisations.

The Cumberland Institute building, an innovation space with a 'warehouse' area that can be used for major gaming simulations and mock-ups, opened in July 2015. Its highly interactive environment provides space to plan new services, troubleshoot challenges and think strategically about healthcare delivery.

Networks and collaboration

Alongside the major players, there are a wide range of emerging life science companies in Thames Valley Berkshire.

OBN is a membership organisation supporting and bringing together the emerging life science companies, corporate partners and investors through networking, partnering, purchasing, advising and advocacy activities. It has 380-plus member companies located across the golden triangle and beyond.

Examples of emerging life science companies (OBN members)

| Name | Website | Sector | Summary | Location |
|-------------------------|--|--|---|--------------------------|
| Valevia | www.valevia.co.uk | Therapeutics discovery and development | Start-up company with antibacterial asset in development | Newbury |
| Carbosynth | www.carbosynth.com | R&D support | Established to provide the most comprehensive product range in the fields of carbohydrates and nucleosides for the international Life Science R&D communities | West Berkshire (Compton) |
| TranScrip Partners | www.transcrip-partners.com | CRO | A rapidly growing CRO that supports biopharmaceutical product development and life cycle management across a wide variety of disease areas | Reading |
| Premier Research Plc | www.premier-research.com | CRO | A mid-sized CRO with a wide range of skills in pharmaceutical development | Wokingham |
| CEM Analytical Services | www.cemas.co.uk | CRO | A leading contract analytical company that specialises in generating registration data on behalf of the pharmaceutical, agrochemical and biocides industries | Wokingham |



//The golden triangle is one of the best places in the world to do life sciences, and it's clear that by being more joined up we can make a global impact.//

Eliot Forster, Executive Chair of MedCity

Healthcare

Access to healthcare providers

Thames Valley Berkshire is home to a number of highly regarded healthcare providers which seek to utilise innovative research. Such providers include:

- The Royal Berkshire Hospital (Reading)
- Berkshire Healthcare NHS Foundation (Bracknell)
- Frimley Health NHS Foundation Trust, Heatherwood (Ascot)
- CircleReading Hospital

Royal Berkshire Hospital

The Royal Berkshire Hospital, located in Reading, is a National Health Service hospital. It provides acute hospital services to the residents of the western and central portions of Berkshire, and is managed by the Royal Berkshire NHS Foundation Trust.

The hospital provides 813 inpatient beds (627 acute, 66 paediatrics and 120 maternity), together with 204-day beds and spaces. In doing so, it employs over 4,000 staff and has an annual budget of £228 million

It is one of the first hospitals in the UK to use the Da Vinci robot for multi-specialist surgery on the NHS.

Proton Beam Therapy Centre

A cancer treatment centre featuring some of the UK's first proton beam treatments is set to be located at the new Thames Valley Science Park.

It will feature new facilities for proton beam therapy, a linear accelerator, as well as a CT Suite and an MRI. Proton Partners International Ltd expects it will treat up to 500 patients a year and will also offer imaging, chemotherapy and traditional radiotherapy.

Mike Moran, chief executive officer of Proton Partners International, said:

"Reading is the perfect location for our third centre - it is close to well-connected transport links and opens the door to proton beam therapy to patients from the South of England. By being located at the Science Park in Reading, Proton Partners will be at the heart of one of most exciting and thriving projects in the health and life sciences sector in Europe".

Consultancy and support

The life sciences sector in Thames Valley Berkshire is supported by a strong mix of support organisations, including consultancies, patent and trade mark attorneys and providers of R&D space.

Selection of companies involved in consultancy, laboratories or associated industries

| | Website | Sector | Summary | Location |
|-------------------------|--|------------------------|--|------------|
| Black Swan Analysis Ltd | www.blackswan-analysis.co.uk | Consultancy | A consultancy that provides valuations and commercialisation plans to companies in the healthcare industry | Maidenhead |
| Rssl | www.rssl.com | Consultancy | Global leader at the forefront of scientific analysis, consultancy, product development and training serving the food, drink pharmaceutical, biopharmaceutical and healthcare industries | Reading |
| Cleveland | www.cleveland-ip.com | Patent | London and Reading-based patent and trade mark attorney | Reading |
| Osborne Clarke | www.osborneclarke.com | Legal | A full-service, international, advisory, litigation and transactional law firm with expertise in many sectors including the life sciences | Reading |
| Porterhouse Medical | www.porterhouse.biz | Medical Communications | Works with global clients to maximise brand impact | Reading |

Specialisms

Drugs and delivery technologies

A large number of world renowned drugs and delivery technology companies have a presence in Thames Valley Berkshire.

For companies working with drugs and delivery technologies, access to markets is crucial. TVB is an excellent enabler with a close proximity to both local and international markets. It is a strong export location. 36% of TVB enterprises sold to international markets in 2010, 2% more than the UK average.

Clinical Research Organisations (CROs)

Thames Valley Berkshire has a cluster of around 11 CROs. These include Clinipace, Covance, InnentvHealth, ORION Clinical Services, Pharm-Olam International, PRA International, Premier Research Group, Quintiles and Synergy Outsourcing.

Digital health

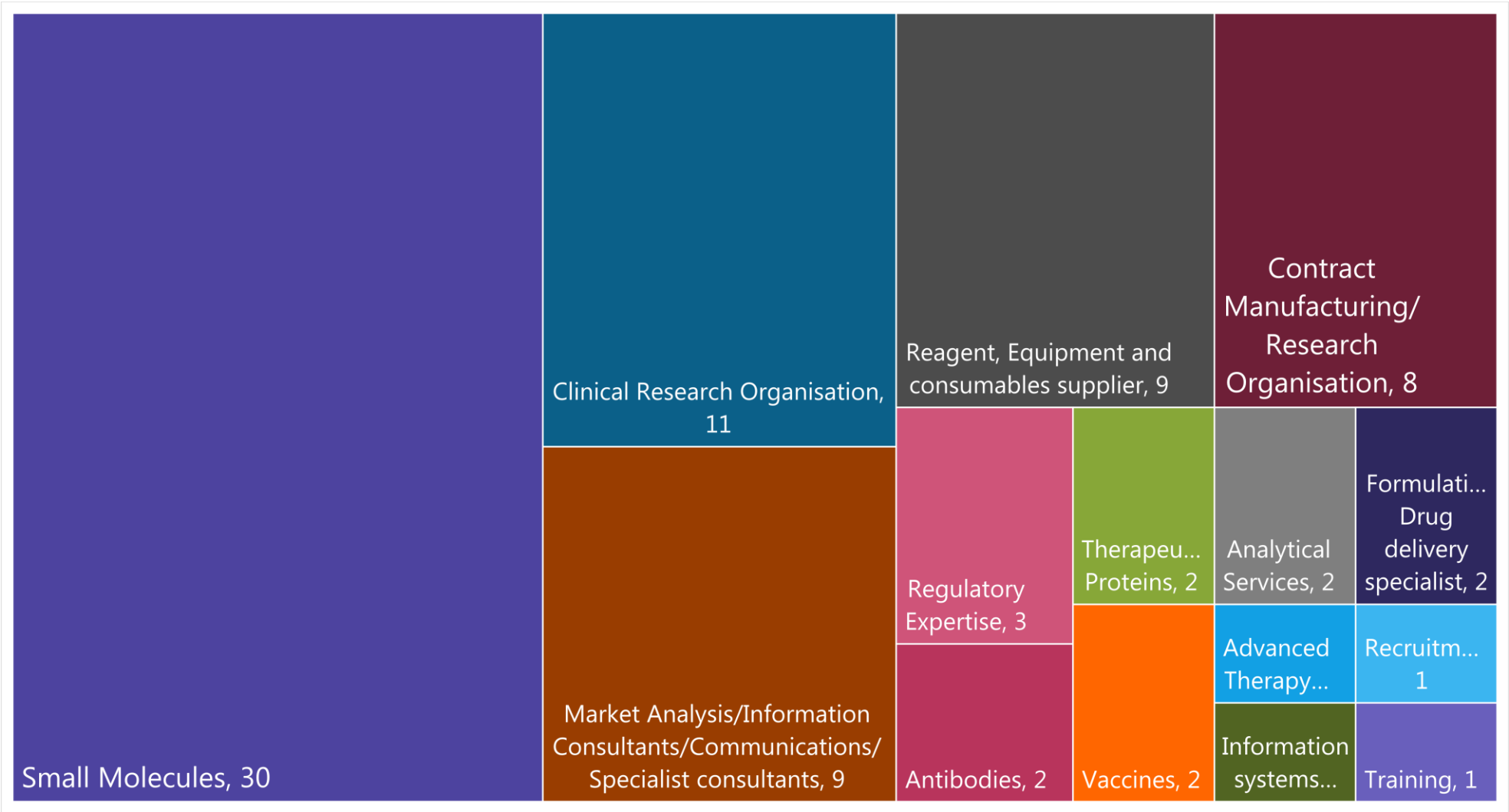
Research carried out by the Oxford AHSN in October 2016 found that the Thames Valley region has a digital health cluster, with particular concentrations of activity around Oxford and Reading.

Thames Valley Berkshire has a strong digital technology sector and a large pool of tech talent including app developers and data analytics experts. 14% of the local workforce work in the tech sector, with the UK average at 4%.

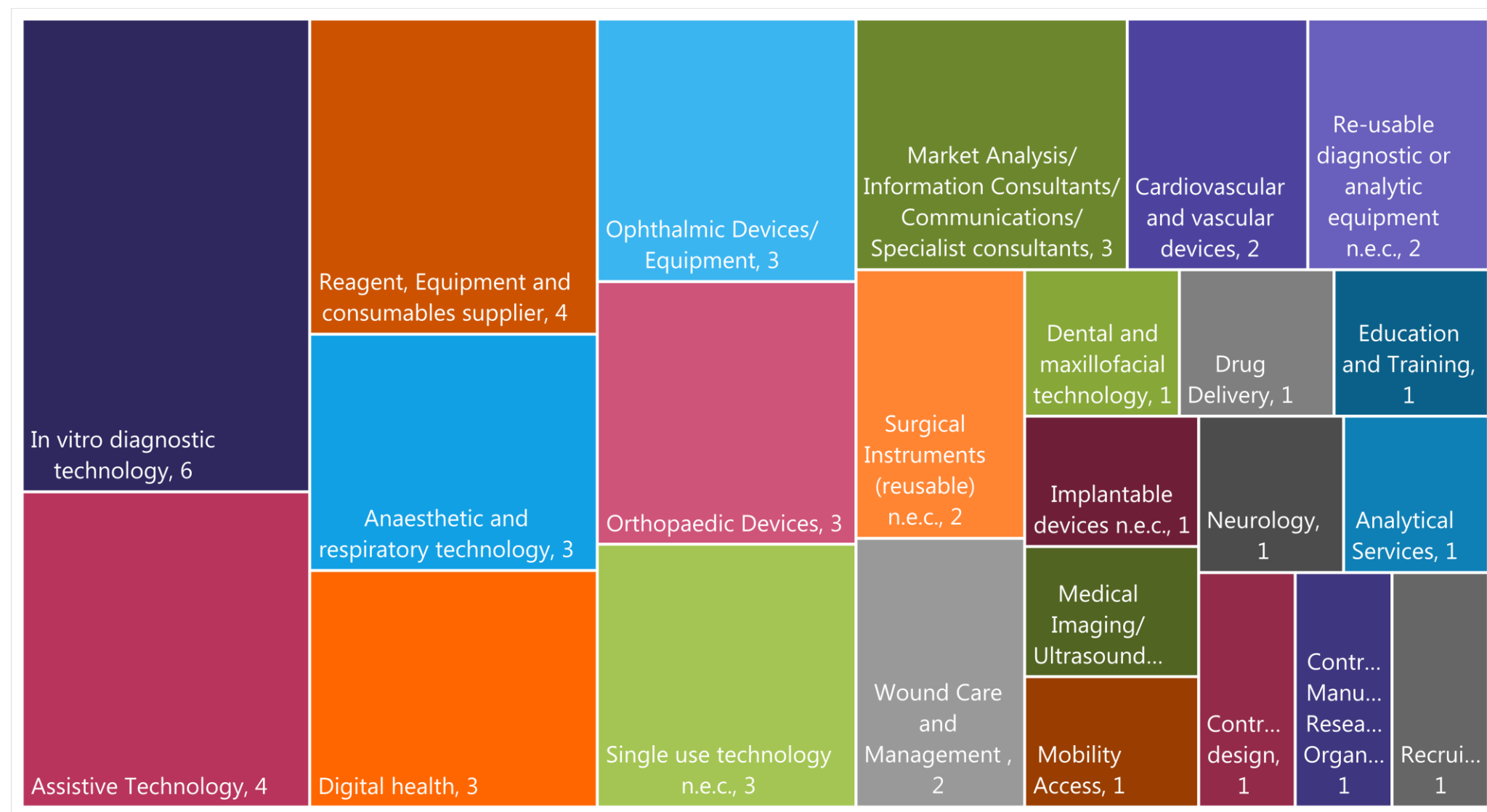
The Oxford AHSN provides guidance for those wishing to enter the digital health sector and holds digital healthcare meetings. These provide an opportunity for frontline healthcare professionals and digital health developers to meet and develop ideas.

There are a number of digital health projects being undertaken at the University of Reading. For example, the Department of Engineering is participating in a large interdisciplinary research collaboration to develop the next generation of telecare. This collaboration, known as Sphere (Sensor Platform for Healthcare in a Residential Environment), aims to develop a digital healthcare assistant in the home, with Reading leading on the development of passive sensors.

Number of companies in the Biopharmaceutical Sector in Thames Valley Berkshire



Number of companies in the Medtech sector in Thames Valley Berkshire



Source: Strength and Opportunity 2015, the UK Medical and Biopharmaceutical Landscape, BIS

Relocation support

Soft landing

The Thames Valley Chamber of Commerce (TVCC) has extensive experience of foreign direct investment and, through its work with the Department for International Trade (DIT), Local Authorities, Thames Valley Berkshire Local Enterprise Partnership and Thames Valley professional service providers, can provide advice and relocation support. Further information is here:

www.thamesvalley.co.uk

The TVCC soft-landing and local partners programme includes:

- A one-stop-shop for expertise in financial and legal issues, and assistance in recruiting.
- Tried and tested advice on commercial property.

Local government advice and support:

The following links provide information on the inward investment advice and support offered by Berkshire's six local authorities.

Bracknell Forest - www.bracknell-forest.gov.uk/bracknellforestbusiness

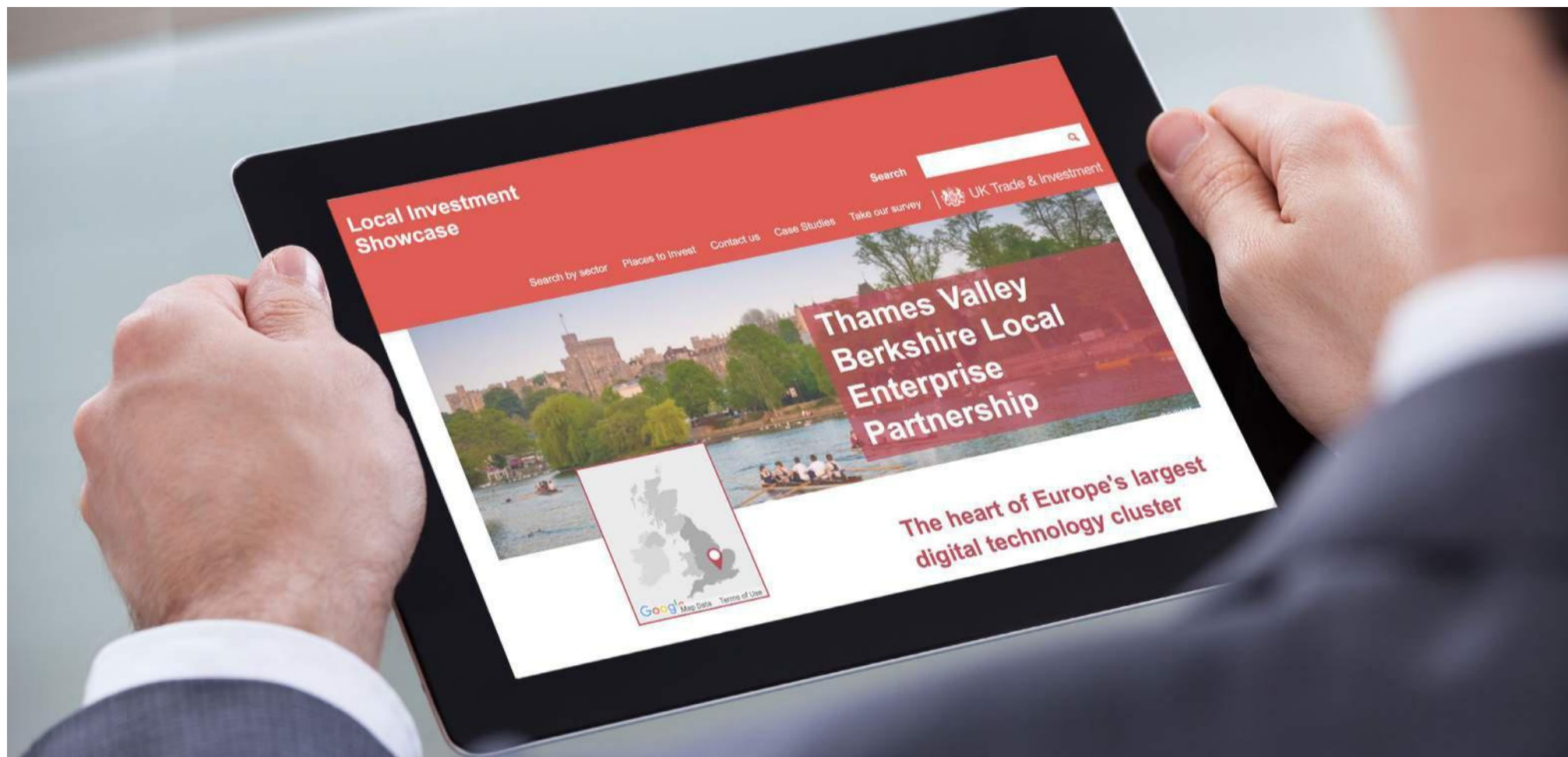
Reading – www.investinreading.co.uk

Slough – www.sloughmeansbusiness.co.uk

West Berkshire – www.info.westberks.gov.uk

Windsor and Maidenhead - <http://investwindsorandmaidenhead.co.uk/>

Wokingham - <http://www.wokingham.gov.uk/>



//We recognise the need to support every component of the pathway. From bench to bedside, we are making it easier to discover, develop and deliver healthcare innovation in the UK. //

Department for International Trade

Talent

Talent pool

The talent pool for local companies is wide and takes in London, Oxford, Bristol, Cambridge, Birmingham and Southampton.

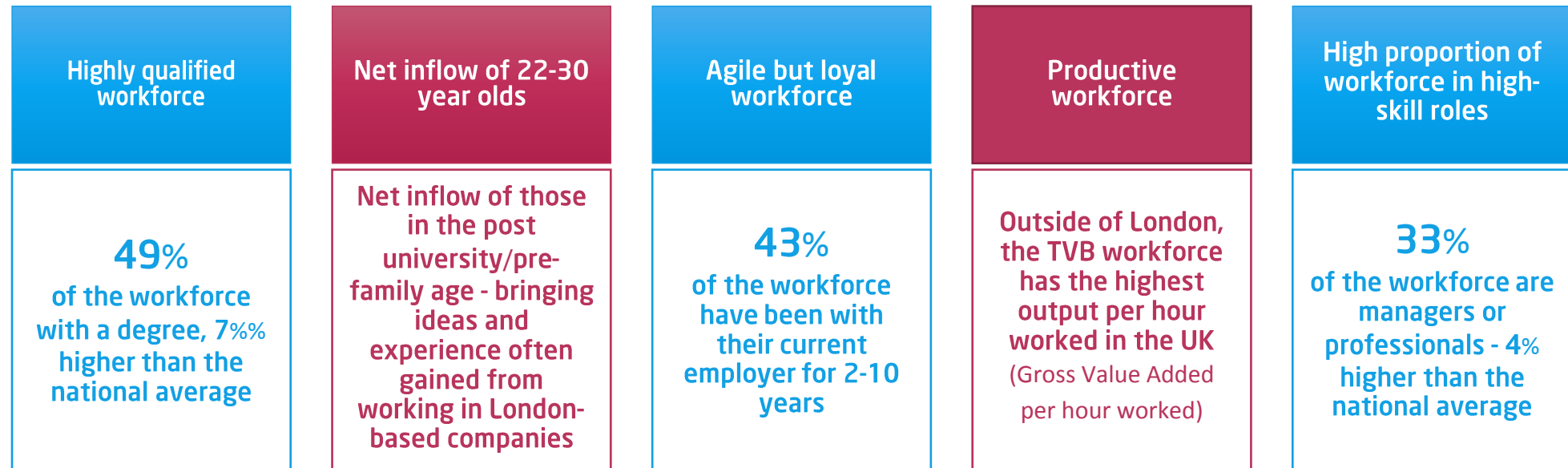
TVB has a highly skilled, productive and loyal workforce.

| Life Sciences workforce in Berkshire - 2015 | Workforce size |
|---|----------------|
| STEM professionals | 1,750 |
| <i>Science professionals</i> | <i>500</i> |
| <i>Science technicians</i> | <i>300</i> |
| <i>IT professionals</i> | <i>250</i> |
| <i>R&D managers</i> | <i>100</i> |
| <i>Health professionals</i> | <i>100</i> |
| <i>Health technicians</i> | <i>300</i> |
| <i>Quality and regulatory professionals</i> | <i>100</i> |
| <i>Other STEM</i> | <i>100</i> |
| Sales and marketing professionals | 1,600 |
| Elementary roles (storage and process plant roles) | 1,150 |
| Administrative | 1,000 |
| Managers and directors | 900 |
| Business, research and administrative professionals | 300 |
| Customer service | 200 |
| Other roles | 1,100 |
| Total | 8,000 |

Quick reference

- 8,000 strong life sciences workforce in Thames Valley Berkshire
- 1,750 work in STEM roles
- 1,600 work in sales and marketing roles
- TVB's workforce is the most productive in the UK

Highly skilled and productive workforce



Talent

University graduates

The University of Reading is ranked in the top 1% of the world's universities, according to QS University World Rankings 2015/16.

66% of graduates from Thames Valley Berkshire return to/stay in the South East region after graduating.

The University of Oxford and Imperial College London (less than 10 miles to the east) – are intellectual powerhouses of global standing. In addition, the plethora of other London-based universities (including Brunel and Surrey) are all within 25 miles.

College graduates

There are five Further Education colleges in TVB in addition to private training organisations.

TVB is also home to UTC Reading, a University Technical College that delivers computer science and engineering excellence for 14-19 year olds within a 15 mile radius of Reading. It was the first UTC in the country to be graded 'outstanding'.

Quick reference

- The University of Reading is in the world's top 1%
- 66% of graduates from Thames Valley Berkshire return to/stay in the South East after graduating
- Berkshire has five Further Education colleges and one University Technical College

//It is important for us to have access to the University academics and support infrastructure. We make extensive use of the University's Statistical Services Centre to undertake data processing. //

Dr Dan Daly of Lein Applied Diagnostics

Thames Valley Science Park

New innovation space

Whilst office space to house pharma firms is bountiful in Berkshire, in recent years, laboratories have been hard to come by. This looks set to change in 2017 with the opening of the University of Reading's Thames Valley Science Park.

Providing a mixture of office and laboratory space on flexible terms, to be able to respond to companies' agility and help growth, the Science Park has already attracted four life science and healthcare tenants. These include Menarini Pharma, who will carry out pioneering cancer research on the site, and Proton Partners International (PPI) who plan to establish a cancer treatment centre featuring some of the UK's first proton beam treatments.

//We see life and health sciences as a really important sector for the Thames Valley Science Park. With a strong cluster of new technology companies already with us, and boosted by the recent arrival of PPI, the Park should be a significant asset to the region, providing lab space for R&D focused companies.//

David Gillham, Executive Director, Thames Valley Science Park



Connectivity

Access to markets

Thames Valley Berkshire's close proximity to London and Heathrow Airport provides easy access to customers, supply chains and financial markets. Heathrow, the world's third busiest airport, provides access to 185 international destinations, including 23 cities in the US.

TVB's excellent links to London include the M4 motorway, the Great Western Mainline to Paddington and the Reading to Waterloo Mainline. Access to Heathrow and mainland Europe makes TVB an ideal location for those wishing to export. Furthermore, it is easy to access most major UK cities from the sub region, either by road or rail.

Digital

The sub region has received government funding to increase its superfast broadband coverage to 97% by the end of 2017.



Quick reference

- 40 minutes from central Berkshire to London and Heathrow Airport
- Superfast broadband coverage increasing to 97% by the end of 2017

Connectivity

Train Travel

| Location | London | Oxford | Milton Keynes | Bristol | Manchester | Birmingham | Heathrow | Gatwick |
|------------|---------|---------|---------------|---------|------------|------------|----------|---------|
| Slough | 16 mins | 45 mins | 1hr 33 | 1hr 30 | 3hr 17 | 2hr 26 | 41 mins | 1hr 36 |
| Reading | 25 mins | 24 mins | 1hr 42 | 54 mins | 3hr 18 | 2hr 06 | 1hr 2 | 1hr 16 |
| Windsor | 26 mins | 58 mins | 1hr 46 | 1hr 46 | 3hr 28 | 2hr 39 | 55 mins | 2hr 5 |
| Maidenhead | 31 mins | 54 mins | 1hr 38 | 1hr 31 | 3hr 35 | 2hr 28 | 48 mins | 2hr |
| Newbury | 43 mins | 56 mins | 2hr 02 | 1hr 43 | 3hr 52 | 2hr 37 | 1hr 48 | 1hr 54 |
| Wokingham | 56 mins | 50 mins | 2hr 06 | 1hr 18 | 3hr 44 | 2hr 26 | 1hr 34 | 1hr 7 |
| Bracknell | 1hr 00 | 58 mins | 2hr 13 | 1hr 28 | 3hr 59 | 2hr 59 | 1hr 28 | 1hr 30 |

Drive times

| Location | London | Oxford | Milton Keynes | Bristol | Manchester | Birmingham | Heathrow | Gatwick |
|------------|--------|---------|---------------|---------|------------|------------|----------|---------|
| Slough | 49 min | 55 mins | 1hr 08 | 1hr 41 | 3hr 30 | 1hr 57 | 15 min | 57 min |
| Reading | 1hr 09 | 54 min | 1hr 30 | 1hr 26 | 3hr 41 | 2hr 08 | 38 min | 1hr 18 |
| Windsor | 54 min | 1hr 00 | 1hr 13 | 1hr 43 | 3hr 35 | 2hr 03 | 19 min | 1hr 01 |
| Maidenhead | 57 min | 50 min | 1hr 16 | 1hr 38 | 3hr 26 | 1hr 53 | 24 min | 1hr 05 |
| Newbury | 1hr 30 | 39 min | 1hr 39 | 1hr 13 | 3hr 28 | 1hr 55 | 56 min | 1hr 37 |
| Wokingham | 1hr 06 | 1hr 01 | 1hr 25 | 1hr 32 | 3hr 38 | 2hr 05 | 33 min | 1hr 10 |
| Bracknell | 1hr 07 | 1hr 01 | 1hr 26 | 1hr 34 | 3hr 39 | 2hr 07 | 32 min | 1hr 04 |

// From 2018 new trains and the electrification of the Great Western Mainline will reduce train journey times //

Infrastructure investment

Current investment

Infrastructure schemes planned or underway in Thames Valley Berkshire include:

- Crossrail
- M4 Smart Motorway
- Superfast Broadband
- Expansion of London Heathrow and a Western Rail Link
- Bracknell town centre regeneration and infrastructure
- Reading Green Park railway station
- Heart of Slough regeneration
- Reading rail station and Station Quarter
- Maidenhead town centre
- New residential developments are underway across TVB

Investment in infrastructure unlocks growth and future prosperity.

Crossrail will stretch from Reading in the west, across to east London. The new railway will improve journey times to London's West End and the City. Full service will commence in 2019.

The Highways Agency is developing the M4 into a “smart motorway” between junctions 3 and 12. It will use cameras, information signs and signals to relieve congestion and improve journey times.

Western Rail Link to Heathrow will deliver direct rail services to Heathrow from Reading via Maidenhead and Slough. Slough will have a 6 minute journey time to Heathrow, Maidenhead 14 minutes and Reading 26 minutes.

Plans have recently been approved for the new Green Park railway station on the Reading to Basingstoke line.

Photo: © Crossrail Ltd



Property

Thames Valley Berkshire is home to a number of high profile business parks:

Slough Trading Estate

–Europe’s largest trading estate in single ownership (home to UCB Pharma, Lonza and Kosei Pharma UK)

Green Park (Reading)

–with capacity for further development (home to PRA International, Quintiles and, in 2017, Bayer)

Winnersh Triangle (Wokingham)

–with capacity for further development (home to Kowa Pharmaceutical Europe and Becton Dickinson)

Arlington Square (Bracknell)

–close to the M4, M3 and M25 motorways

Thames Valley Park (Reading)

–home to array of international IT companies

Flexible incubator space

- Thames Valley Science Park – opening in 2017
- University of Reading Enterprise Centre and Science and Technology Centre
- GROW@GreenPark

Value for money

- Prime rates in London are at least double those in TVB’s major towns
- Commercial premises in TVB with Grade A space are good value in comparison to London and other locations in the South East

Photo: SEGRO’s Slough Estate



Living in Thames Valley Berkshire

Rich history, culture and leisure

Thames Valley Berkshire is home to an abundance of visitor attractions, sporting events and Michelin-star restaurants, along with the 'London Season' events of:

- Henley Royal Regatta
- Royal Ascot
- Royal Windsor Horse Show
- Cartier Queen's Cup at Guards Polo Club

Windsor Castle is the oldest and largest occupied castle in the world.

Nearby are national stadiums for rugby at Twickenham, cricket at Lords and football at Wembley.

Golf courses abound including international standard courses at Wentworth and Sunningdale.

Other attractions include Legoland Windsor, Reading music festival and nearby Thorpe Park and Chessington World of Adventures.

Attractive living environment

TVB is one of the few locations in the UK where it is possible to live and work in a picturesque setting but within easy reach of a world city, London. Over a third of Berkshire is designated as an Area of Outstanding Natural Beauty, one of the highest concentrations in England.

Shopping and eating out

The Oracle, Reading's premier shopping destination hosts 90 retail units - combining chic boutiques with major department stores. It also has a 10 screen Vue cinema and a wide range of eateries.

Windsor Royal Shopping is located opposite Windsor Castle in the Grade II listed Victorian Railway Station.

The vast array of shops and restaurants of London and Oxfordshire are within close proximity, including those at Bicester Village.

The Berkshire village of Bray has two of the UK's four three-Michelin-starred restaurants, The Fat Duck and the Waterside Inn.

//Set alongside the rejuvenated waterways through Maidenhead, new homes and commercial spaces will transform the area of the town and attract new businesses, residents and shoppers //

Tamra Booth,
Group Operations
Director at Shanly
Homes

Education in Thames Valley Berkshire

Schools

Schools in Reading and Slough perform particularly well in terms of A-level and GCSE results. Reading has the highest proportion of pupils going to Oxford or Cambridge University (7%) and the second highest proportion going to a Russell Group university (33%) in the country.

Universities

The University of Reading has over 17,000 students, including 6,400 overseas students from over 140 nationalities.

The University's Henley Business School is one of the world's few business schools to hold triple-accredited status and is consistently ranked among the world's top 50 business schools by the Financial Times and The Economist.

Other nearby Universities include the University of Oxford, Oxford Brookes, Imperial College and the University of Surrey.

//We have a programme of engaging SMEs through a variety of initiatives which link to the University's dedicated business incubation centres to provide opportunities for our students and graduates. //

Henley Business School

Cost of living

Housing

Housing affordability across Berkshire varies from 8 times the average income in Slough to 13 times the average income in Windsor and Maidenhead. This compares with over 20 times in parts of London.

Wages

Average annual pay for full-time employees in Thames Valley Berkshire ranges from £31,600 in Slough to £35,400 in Bracknell Forest.



Shanly Homes' Chapel Arches development in Maidenhead

Case studies



AliveCor, a small, rapidly expanding e-health company based in San Francisco, chose to locate in Slough

Of their investment in the Thames Valley, AliveCor states, 'it's an ideal location as it contains the correct mix of industries that we need and impacts: Mobile Telecoms, Medical Technology, Secure Cloud based storage and big data analytics. The calibre of potential staff and collaborative industry partners is second to none. Also, as this is the EU base, to be close to Heathrow airport is vital to reach all of the EMEA markets'.



Celltech, now UCB, was set up in Slough due to its proximity to Heathrow airport and international markets. It has been there for 30+ years.

UCB's current Slough HQ boasts the UK centre of excellence in drug discovery, leading to the development of cutting edge bio-pharmaceuticals. UCB is the fourth-largest investor in UK pharmaceutical research and development, after GSK, AstraZeneca and Pfizer. UCB, a smaller-scale player, last year spent £200 million in the country. There are three buildings on the Slough Campus and in 2009 UCB invested £25 million into a new Biologics R&D Centre. The new lab houses over 100 scientists, adding to the company's existing research operation in Slough. Around 40% of UCB's over- all research is done in the UK, with the remainder carried out at its headquarters in Belgium.



Bracknell based pharmaceutical supplier, Boehringer Ingelheim (BI) UK Ltd has underlined its commitment to the UK and Thames Valley with the refurbishment and expansion with a £6m+ redevelopment plan for its offices.

Thames Valley Chamber supported Boehringer Ingelheim's application and helped engage with senior officials and the economic development team within the local authority throughout the entire process.

Professor Klaus Dugi Boehringer Ingelheim UK & Ireland Managing Director said

"This is a significant milestone for Boehringer Ingelheim. We aim to create the best possible working environment for our staff and are always looking at ways to improve on the service and commitment levels we deliver to our patients. We are looking forward to having the team all under one roof."

Source: Thames Valley Chamber of Commerce Inward Investment Results 2015/16

Sources

| Page | Data | Source |
|------|-----------------------------|---|
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