

Company attitudes to Hanley Grange

A survey of high technology companies based at Granta Park, Babraham Research Campus, Chesterford Research Park and in the immediate vicinity of the proposed development

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Introduction

The Government has short listed a proposal from Jarrow Investments for “Hanley Grange”, a new town near to Hinxton and bounded by the A11, A505 and A1301. A town of 8,000-11,000 homes is planned for the 486 hectare site.

Hanley Grange is one of 15 proposed “eco-towns” under consideration by the government, although this location is unusual in that the land is completely “Greenfield”. Most or all of the other sites under consideration are either “Brownfield” or a mixture of Greenfield and Brownfield land.

The developers of Hanley Grange have suggested that the biotech-based science parks of Babraham, Granta Park and Chesterford Research Park would provide jobs for the people who would live in the new town. The developer states:

Located 4 and half miles south of Cambridge and one mile east of junction 10 of the M11 within the ‘high-tech’ cluster, Hanley Grange is surrounded by several major employment sites and will give people the chance to live closer to where they work.¹

They also state that

The proposals are located at the heart of the South Cambridge high tech cluster which is vital for the local, regional and national economy, but which lacks enough homes to ensure it is able to grow

However, companies based at these science parks have not been polled to ask for their views on the development and whether these assumptions are true or false. Hence we have conducted a survey of companies in the close vicinity to Hanley Grange to obtain their views.

Although the Wellcome Trust Genome Campus is also located adjacent to the site, they have not been included in this survey as The Wellcome Trust is one of the major landowners of the Hanley Grange site and hence would have a conflict of interest in completing this survey.

Status of the high-tech cluster in the vicinity of Hanley Grange

The three main science parks around the site have a different mix of companies, as follows

The Babraham Research Campus comprises the academic Babraham Institute and a number of smaller commercial companies. Around 650 people work on site, 350 of whom are academics based at the Institute. The remaining 300 people are employed in 32 companies (ie, average size less than 10 employees), occupying 72,000 sq.ft. of laboratory and office space². Many of these companies are start-ups and are nurtured on site by staff at Babraham Bioscience Technologies (BBT).

¹ www.hanleygrange.co.uk

² Email from the Senior Operations Manager, Babraham Bioscience Technologies Ltd.

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BBT is just about to apply for detailed planning permission for a further 40,000 sq ft of space which they hope to have available for occupancy in early 2010. This expansion of facilities could lead to an increase in the number of companies and staff over the next 2-3 years but, in the words of BBT, “this all depends on the biotech climate”.

Even if the current downturn in the biotech sector was to reverse (and there are no signs that it will) we estimate that the total number of jobs that could be available on the Babraham campus after 2010 would still be less than 800.

Chesterford Research Park contains a smaller number (12) of slightly larger companies than Babraham (average size just over 30 employees). Despite the hype surrounding the expansion of jobs in the Cambridge bio-cluster, the total number of people on-site has remained static over the last 5 years³ at just under 400.

Although 2 companies of significant size have moved to Chesterford Park in recent years (Pfizer and Illumina) these gains in numbers have been off-set by equivalent reductions in other companies retrenching or leaving the UK altogether (Medivir and, recently announced, Sosei). Even flagship facilities on site, such as the attractively refurbished Mansion House completed in 2006, still have only 7 of the 12 suites occupied.

Despite the stagnation in employment on site, development continues and new laboratory space is being established over the next few years. Even if the current downturn in the UK biotech sector reverses and all facilities on site are let and fully staffed, there will still be no more than 800-1,000 jobs in total at Chesterford Research Park

Granta Park has 12 companies on site, employing a total of almost 2,000 people. The largest company is TWI, a specialist in welding, joining and associated technologies, with other significant companies including MedImmune (part of AstraZeneca), UCB (who have recently announced they are moving out of the UK) and PPD. With the exception of TWI, all companies at Granta Park are in the Life Sciences sector⁴.

Many who work on the park choose to live in Cambridge with a high proportion of Cambridge Graduates accounting for the number. This journey, which is 8 miles, is facilitated by the provision of a free bus service which runs from Cambridge Station in the morning and returns in the evening. Others live in Haverhill, Newmarket, Royston and Sawston, all within 15-30 minutes travelling distance.

Granta Park is now roughly two thirds developed so assuming a proportionate increase of existing staff numbers, the total employed is unlikely to exceed 3,000.

We do not have statistics on the growth or otherwise of employment on this site, but we suspect that total employment has fallen over the last 5 years, mainly to the withdrawal of 2 major companies from the UK (UCB and Millennium).

Overall, according to the site management teams, the three main science parks surrounding the proposed Hanley Grange could grow from the current level of 3,050 employees to a maximum of 4,800 jobs after all development programmes are complete and if all facilities are fully let. We believe a more realistic figure to be a maximum of

³ Personal communication from the Park Manager, Chesterford Research Park

⁴ Email from the Managing Director, MEPC Granta Park

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around 3,900 jobs, which still assumes a revival of fortunes in the Cambridge based biotechnology industry.

We believe that of these 3,900 employees, most will not live in Hanley Grange. This is partly due to the fact that over 3,000 of these individuals are (presumably) already happily housed, and partly due to the fact that the seniority of individuals who are likely to move into new jobs at the science parks will mean that their housing aspirations will exceed anything likely to be available in Hanley Grange. We estimate that no more than 10% of employees at the 3 science parks will ever live in Hanley Grange (ie, less than 400 homes).

Importance of the high-tech cluster in the vicinity of Hanley Grange

Last year CH&B conducted a full review of the global biotech pipeline on behalf of UK Trade & Investment⁵. The review showed that, on a global basis, the output from UK based biopharmaceutical companies is second only to the USA. It also showed that:

- UK companies produce twice as many new pharmaceutical products than Japan, the country ranked number three on the global scale.
- Producing 35% of all pharmaceutical products discovered in Europe also puts the UK almost three fold ahead of France, the second most important country in Europe for drug discovery.
- Companies that were based in the Cambridge biotech cluster were responsible for over a quarter of all UK drug projects

Perhaps not unexpectedly, this excellence in biomedical research has attracted many potential overseas suitors and many of the better UK biotech companies have now been acquired by overseas companies. Indeed, in 2007 the number of acquisitions of UK biotech companies overtook the number of licensing deals involving UK biotech companies for the first time⁶.

Many of the biotech companies based at Granta Park, Chesterford Research Park and Babraham are now owned by overseas companies.

However, it is now generally accepted in the industry that UK biotech is rapidly losing much of its competitive edge, partially due to better biotech companies now emerging in France and Switzerland, and partially due to a crisis of confidence amongst financial investors in UK biotech. Several of the traditional venture capital backers of UK biotech have recently pulled out of investing in early stage biotech (eg, Apax, 3i and Merlin). These trends are worrying and no easy solution is apparent.

One consequence is that several local UK companies are now considering whether they would be better off moving overseas. It has also meant that the overseas parents of some of the companies based at the 3 science parks in the vicinity of Hanley Grange are reconsidering whether their UK presence is providing adequate returns. We have recently seen Millennium (USA) move out of Granta Park, Medivir (Sweden) significantly

⁵ The UK Drug Pipeline, CH&B report, March 2007

⁶ License or Buy, CH&B report, June 2008

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downsize its operations at Chesterford Park, UCB (Belgium) announce they will be leaving Granta Park and most recently Sosei (Japan) announce they will be leaving Chesterford Park.

We believe that any deterioration in the environment for companies based at the 3 local science parks (real or perceived) will crystallize moves overseas for some of them. This belief has been reinforced by many of the responses we have received to the survey as shown later (see responses to question 8).

Survey methodology

The survey was conducted partly by telephone interview and partly through emailed responses depending on the preferences of the respondent.

Only one respondent per company was sought. Where more than one respondent from the same company completed the survey we have used the comments made by the most senior respondent from that company.

The respondents to this survey are identified by their job title (eg, Chief Executive Officer), type of company (eg, Biotech Company) and location (eg, Granta Park). A list of respondents so identified is given in the appendix.

Main conclusions from this study

- Lack of housing is not an issue for any of the companies based at the major employment sites around Hanley Grange. It has certainly had no impact on the growth of jobs at these sites.
- Very few of the staff based at the major employment sites around Hanley Grange are likely to live there. We estimate that no more than 400 of these employees will live at Hanley Grange.
- None of the companies that responded to our survey believe that Hanley Grange will have a positive impact on their business overall. Most think that their business will be harmed by the development.
- Many of the companies that were contacted were unaware of the scale and location of development – despite being based at the major employment sites around Hanley Grange. Several expressed concern that they had not been approached for their input.
- Every respondent fears that the development will cause major traffic congestion around the area and that the accessibility of their current business location would be compromised. This was by far the major concern expressed by the respondents.
- All respondents feel that a major housing conurbation adjacent to their business would make their location less attractive. Many have deliberately chosen their current location because of its rural nature. None believe Hanley Grange would help in their efforts to attract high calibre staff. Many believe that it will hinder their efforts.
- Although most respondents feel they will be “stuck with it”, many believe that a Hanley Grange development would cause them to move out of the area. Two of the companies responding said they would move overseas.
- Given the above, and the importance of Cambridge to UK biotech, the Hanley Grange development is likely to be detrimental to UK biotechnology overall.

Respondents

Resp.	Company type, location	Comments from
1	Biotech Company, Pampisford	Chief Executive Officer
2	Life Science Consultancy, Chesterford Research Park	Chief Executive Officer,
3	Biotech Services Company, Chesterford Research Park	Chief Executive Officer
4	Biotech Services Company, Stapleford	Chief Executive Officer
5	Biotech Company, Granta Park	Chief Executive Officer
6	Biotech Company, Chesterford Research Park	UK Site Head
7	Biotech Company, Babraham	Chairman
8	Biotech Company, Chesterford Research Park	Chief Executive Officer
9	Biotech Company, Chesterford Research Park	Chief Operating Officer
10	Medico-legal consultancy, Shelford	Chief Executive Officer
11	Biotech Company, Babraham	Chemistry Team Leader
12	Biotech Company, Babraham	Research Director
13	Biotech Company, Granta Park	VP Business Operations
14	Biotech Company, Babraham	Senior Scientist
15	Biotech Company, Babraham	Research Scientist
16	Biotech Company, Babraham	Project Manager
17	Granta Park	Managing Director
18	Biotech Company, Babraham	Chief Executive Officer
19	Medical Communications Company, Hinxton	Director
20	Life Science Investment Company, Hinxton	Partner

Answers - question 1

Are you aware of the proposed Hanley Grange development and, if so, how did you first become aware?

Company	Comment
1	I became aware from notices placed in the area opposing the development.
2	I am also a governor at Sawston Village College. It was mentioned "in passing" by one of my colleagues at one of our meetings.
3	I saw a poster in the village shop (Ickleton) about a week ago.
4	Yes, from Stapleford Parish Magazine
5	Yes, we are aware of this development and heard about it through the local media. We have never been contacted by anyone involved with the planning process seeking our views.
6	Yes, but only recently through posters in the road on my drive home from work.
7	I think it was 6 months ago on the local news.
8	Yes. Became aware via a friend.
9	By your email actually!
10	Yes: only vaguely in the last 2 weeks when told by a friend, and then in detail in the last 4 days after driving past the protest signs and then searching for information on the web. We've had no 'official' notification or consultation which is outrageous considering its size.
11	Through signs on the side of the road
12	I live in Babraham and there has been much discussion within the local community, both informally and at the Parish Council. There have also been people coordinating petitions and letters of objection.
13	Yes, I live in Linton and became aware through the local press
14	This is the first I've heard of it
15	Yes. Became aware through local papers, pamphlet delivered to my door by the developers themselves and pamphlets and road banners by the anti-development campaign
16	Yes, I first became aware due to coverage on Cambridge news programs
17	Aware of the Hanley Grange Development through the Cambridge Evening News, local publicity and through contact in local government.

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Are you aware of the proposed Hanley Grange development and, if so, how did you first become aware?

Company	Comment
18	Poster campaign against it.
19	I became aware of the proposal in my role as Parish Councillor and am actively campaigning against this development
20	Yes, I live in the area and saw some early fliers about the proposed development.

Answers - question 2

What impact(s) do you think the development will have on your company's ability to attract and retain staff?

Company	Comment
1	It would have a negative impact by virtue of the increased congestion which would be inevitable. One of the reasons we like this area is because it is less congested than north Cambridge
2	This will have a dramatic and negative impact. Everyone we have called for interview for a job at our current location has been "even" keener to work for us having seen the environment. If this development goes ahead the environment will become a negative, not a positive, factor in our ability to recruit top talent
3	Well, it won't be positive
4	[no response]
5	It is unlikely that the development will have an initial impact, although in the longer term, people may find travelling to and from work more difficult if traffic volumes increase. Congestion could make attracting good staff more difficult. I do not think the type of property proposed for the town would appeal to the calibre of staff we employ.
6	Little impact - finding accommodation does not seem to be an issue
7	It could be positive if the accommodation was affordable and links to Babraham and Granta Park were improved, but the road congestion would be disastrous.
8	It depends whether the development will attract highly-trained scientists & professionals. My impression is that this development will contain smaller properties – may be attractive to first-time buyers if quality is sufficient.
9	I am not sure it will have much effect unless the feared traffic congestion materializes, i.e. similar to the Cambridge science park has a pretty bad reputation on that front.
10	It will increase congestion locally, and fill and delay public and private transport vehicles; this will have an adverse effect on existing staff quality of life and willingness to stay. It might bring more staff in to the locality if the property prices in the new development are well below the local average, but this seems highly unlikely.
11	None at all
12	I think that it will make very little difference
13	There could be two impacts. Firstly, it could be positive for a small number. Occasionally we have had problems attracting people to Cambridge due to house prices. However, the scope of the development will have a large negative impact due to increased traffic, car fumes, loss of rural environment, etc.

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What impact(s) do you think the development will have on your company's ability to attract and retain staff?

Company	Comment
14	Minimal
15	The majority of existing employees live within a 15-30 min drive from the place of work. As far as I am aware, none of them would consider relocating to the proposed Hanley Grange because of its proximity to work. We are having no problems attracting many applicants at our current round of recruitment. Hanley Grange might have an impact on that, but we are already dealing with higher than demand offers as it is.
16	I believe it will reduce significantly our ability to attract and retain staff.
17	We would feel that the ability to recruit staff to Granta Park could be made worse by fears of traffic congestion; unlikely that the promise of low cost housing would counter this.
18	None: recruitment not an issue. Loads of good quality people already on the job market – accommodation for them not an issue as they are already located in the cluster.
19	It would have a negative impact due to traffic congestion and destruction of the rural environment. I doubt that many would see any attraction in living in high density housing. Many people prefer to live in Cambridge where there is easy access to amenities and entertainment.
20	As an investor, we do not have to be located in the Cambridge region as long as we have access to it. I imagine that a development of this magnitude will make the area south of Cambridge unattractive for professionals seeking a high quality of life and that we may simply choose to locate ourselves elsewhere.

Answers - question3

Do you think that this development will have an impact on the environment in which you work that could impact the productivity of staff at your location? If so, which type of staff and in what way?

Company	Comment
1	This area currently has a rural feel which is enjoyed by our staff. This would clearly disappear
2	It is noticeable how more productive and creative we have become in this rural environment. I anticipate we will loose a lot of that.
3	It will absolutely adversely impact the productivity of our staff. Travel to our clients will be very difficult – our clients being senior management of, and investors in, biotech companies in the area and further away
4	[no response]
5	If the area becomes congested, then travelling times will increase and that will mean all of our staff will have to allow more time, not just for their journey to work, but also for business travel. At the present time, staff can drive to Whittlesford Station and park, but it is unlikely that there will be any parking spaces left if more people are using the station. This would mean using taxis which is an extra cost to the business.
6	Higher levels of traffic will be annoying.
7	Road congestion will be disastrous, as will be the train link from Whittlesford station. We will see additional cars just sitting on the roads around the area pumping of carbon monoxide. It's not well thought out with the infrastructure available. Visitors to our company already get held up on the A505 and arrive late
8	Yes. Staff value the rural atmosphere of Chesterford Research Park and surrounding areas, as a place to live and work. All staff will be affected.
9	No, I wouldn't expect the development to really effect the environment on Chesterford Research Park in that way.
10	Adversely by increasing traffic locally and by filling public & private transport vehicles and encouraging further commercial development. I don't think it will affect productivity of our staff either way.
11	Not at all
12	The biggest impact will be the inevitable increase in traffic levels in the local area thus making the journey to work, particularly those traveling from the west, even more painful than it already is. We have quite a few staff who live in Royston.

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Do you think that this development will have an impact on the environment in which you work that could impact the productivity of staff at your location? If so, which type of staff and in what way?

Company	Comment
13	Without a doubt. Most of our employees rely on their own transport to get to work and this development will adversely impact them. Commuting time will increase, air quality will fall, road and rail transport will suffer.
14	It will increase traffic and make it harder to get to work.
15	I am extremely concerned about traffic problems that will inevitably develop in the area with such a high density development. I used to travel via the A505 to get into work a year ago and it was heavily congested then. I can't imagine how it would be if the new development comes into existence! In that respect, work will be affected because of delays at getting in, and it will affect everybody driving into work.
16	If Hanley Grange is built, productivity will be reduced for the majority of our staff. A significant reason for this will be because journey times into and out of work will generally increase. Also, our employees value the pleasant environment in which they live, work and travel through. Building Hanley Grange will degrade the local area for all, leading to our best, most employable staff considering moving away from the area.
17	The impact on the environment is also likely to be negative given that research staff prefer to work in peaceful locations.
18	Likely to make the existing transport issues even worse: already the main drawback of the Cambridge cluster.
19	I foresee greater frustration in terms of traffic congestion and longer commuting times for everyone.
20	It will make it a substantially more "urban" environment which many people come here to avoid. The quality of life in the region of the development will almost certainly decline and this will inevitably affect productivity, be it in decreased working hours as a result of the need to avoid increased congestion in the area or in less tangible ways such as decreased enjoyment of life and associated motivation

Answers - question 4

If the development goes ahead, would that affect the way in which you view the attractiveness or otherwise of your current location and, if so, in what way?

Company	Comment
1	Yes, it would become less attractive.
2	It will ruin what is currently an ideal location for us
3	Currently this is an extremely attractive site and very convenient for commuting. We will become a small oasis of green in a sea of concrete and car fumes.
4	Effect on local infrastructure, especially transport, likely to be very negative. Roads already congested and A1301 to Cambridge is in poor condition, crowded at rush hour and passes through villages. Whittlesford-London rail connection already busy. Overall the area will become more congested and stressful to live in
5	[We] made a decision to move to Granta Park from the Cambridge Science Park for its pleasant rural environment without the traffic problems experienced north of Cambridge
6	No
7	It could be positive, allowing people to live closer to where they work, but biotech has been declining over the last few years in South Cambridge. We've seen many local companies being acquired and then moving out. Biotech in South Cambridgeshire is shrinking and could vanish. We certainly don't need this development for biotech. The maximum number of houses needed for the science parks in the area is probably a few hundred only.
8	Don't know.
9	My primary concern is the potential extra traffic. 5 or 10 minutes queuing so close to work would be very disappointing, anything longer would be near intolerable.
10	Adversely, by increasing traffic & transport congestion and encouraging further commercial development.
11	Not at all
12	I don't think that it will change our view of our location currently
13	As I have mentioned, this will change a pleasant rural environment into a semi-urban one.
14	Make it less attractive – more cars, fewer nice green fields.
15	It will certainly have a huge deleterious impact on the attractiveness of the area. The area feels very rural and peaceful because of the little villages scattered around the

If the development goes ahead, would that affect the way in which you view the attractiveness or otherwise of your current location and, if so, in what way?

Company	Comment
	countryside. Each village has its own identity because of the green areas surrounding it. If that were to disappear, the feeling of the place would change dramatically, in a negative way.
16	If the development goes ahead the attractiveness of our current location will be significantly reduced. This will be as a consequence of increased journey times, travel issues and increased staff turnover. In addition, the general local environment will be significantly degraded by the construction of a significant town in this inappropriate location.
17	The attractiveness of Granta Park is likely to be compromised by Hanley Grange as its location away from a major settlement, yet relative close proximity to Cambridge (8 miles) are considered an ideal combination by many companies.
18	Not really other than making transport issues worse.
19	The current location offers an attractive combination of proximity to like-minded businesses, academic excellence, a rural environment and easy access to major roads and rail links. This development will only diminish these important attributes.
20	It would become less attractive. There are simply not enough jobs in the area, professional or otherwise, to support such a massive development and this will inevitably lead to substantial increases in commuting and road congestion.

Answers - question 5

We have seen biopharma companies of all sizes move into and out of the area in the last few years. Do you think that this development could escalate or delay a future move for your company, and why?

Company	Comment
1	It is difficult to anticipate a mass exodus of biotech/pharma companies because the relocation of a company and employees is a major exercise and would almost certainly lead to staff losses notwithstanding the fact that the development would be unattractive. I suspect that we would be “stuck with it”. As far as I can tell, local companies such as ours have not been consulted nor opinions canvassed so this smacks of big government running roughshod over the local community and local businesses.
2	It could bring forward a move overseas. Currently 75% of our revenue comes from outside the UK. Hanley Grange could be the straw that drives us out.
3	Cambridge isn't as attractive as it once was. It is losing its competitiveness. We work in a global business. Hanley Grange will escalate and crystallize a move for us, not just out of the area, but out of the country. We have portable skills and have been based overseas in the past. It's only the soft stuff that keeps us here. If that goes we would too.
4	No
5	It could influence our future at Granta Park if our experiences of the new town as a neighbour proved negative.
6	No
7	This wouldn't be a major consideration for us. If we moved it would be for better facilities.
8	No
9	Unlikely. If we were to move it would be for much more fundamental business reasons.
10	Realistically it will be very unlikely to affect us to a degree such that it would make a move more or less likely.
11	Not at all
12	Again, I don't think that we will be affected in this way
13	No, we are large and firmly entrenched in Granta Park now. The development will make little difference.
14	I don't think it will have any effect on it.

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We have seen biopharma companies of all sizes move into and out of the area in the last few years. Do you think that this development could escalate or delay a future move for your company, and why?

Company	Comment
15	No,it will not, because it is a fairly small size company.
16	This would increase the likelihood of our company moving from this area.
17	Unlikely that the development of Hanley Grange would affect whether Bio-Pharma companies move in or out of the Park as there are other more powerful drivers. However, given the sensitivity that these companies have towards security and their location generally, away from main centres of population, future investment by these companies, particularly those that are foreign owned, could be in jeopardy.
18	[We would] move out if transport issues get any worse.
19	Our business is not limited by geographical considerations – we could go anywhere where there is broadband and good transport links. Building Hanley Grange would make the area significantly less attractive.
20	As investors, we have a smaller number of employees than biopharma and are less tied to fixed operational infrastructure. The Cambridge region has been attractive historically by virtue of the quality of the science emerging from the university and the pleasant rural surrounds in which to build or establish companies. But the biopharma sector has been in decline in the UK for the past several years and there are plenty of other places to locate. I cannot see that we or our investee companies would want to set up or remain in an area that will be subject to this type of development when other locations are on offer.

Answers - question 6

What do you think will be the main upsides (if any) of this development to your company at your current location?

Company	Comment
1	[no response]
2	I can't think of any
3	Well, we'd have to get better at waste recycling and water management wouldn't we! And they'd have to improve that bloody awful Liverpool Street line
4	None
5	There are none
6	None
7	The only positive would be if our staff wanted to live nearer and the houses were affordable.
8	Improved communications, roads etc. – possibly? Low cost housing for junior staff as first-time buyers.
9	Not sure I can think of any.
10	I can't see any; it seems unnecessary in the light of existing planned developments in the area.
11	None
12	None
13	Maybe some more affordable local housing for those that really want it. Some of our staff who currently live in Haverhill might be interested.
14	Depends on how much the plan on improving the infrastructure. Can't see any upsides otherwise.
15	No upsides
16	I can see no significant upside to our company.
17	We can think of no particular upside that this will development will bring to us here at Granta Park.
18	None
19	None

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What do you think will be the main upsides (if any) of this development to your company at your current location?

Company Comment

20 None

Answers - question 7

What do you think will be the main downsides (if any) of this development to your company at your current location?

Company	Comment
1	Congested, no longer rural location
2	Congestion, traffic jams, increased commuting times, reduced productivity, impact on quality of life, etc, etc. The Cambridge to Liverpool Street line is already overcrowded and very, very unreliable. The additional strain from this development would mean that London meetings would become uneconomic for us. We would end up driving to Royston to get the Kings Cross line for those unavoidable London meetings.
3	It would be the reduction in connectivity between our current office and the key locations we serve. We would be more isolated.
4	Increased traffic
5	Road congestion, strain on local infrastructure like electricity supply, water and our pitiful lack of BT broadband and telephone services. Security issues resulting from vast numbers of people moving next door, whose cramped environment will mean they look to places like Granta Park to walk their dogs etc.
6	More traffic
7	Further congestion, visitors to us being delayed, our staff being late for meetings at other sites.
8	Increase congestion
9	Increased traffic.
10	Transport congestion; loss of amenity value of nearby countryside.
11	It will take a lot longer to get to and from work (this could impact on productivity of staff a bit), but is more of a nuisance than anything
12	Increased travel to work times for staff and destruction of the local environment.
13	As mentioned, traffic, infrastructure impact, etc.
14	Increased traffic, and therefore increased commute. Money would be best spent dualing the A505 and Hinxton roads so people can get to Genome Campus and Chesterford easier.
15	Increasing traffic congestion and the difficulty to getting into work on time.
16	There will be a general reduction in staff productivity and it will become harder to recruit and retain staff.

Survey of local Biotech companies concerning Hanley Grange

What do you think will be the main downsides (if any) of this development to your company at your current location?

Company	Comment
17	The major downsides that we perceive as 1) a further strain on the transport infrastructure, and 2) concern that the relatively secluded location of Granta Park, a major attraction for many companies, would be compromised.
18	“10,000 more cars” will make it a complete nightmare and public transport is hopeless. Will destroy the “magic” of Cambridge. There is not even a direct cycle path into Babraham. It’s already difficult to park in near any of the South Cambs stations.
19	Traffic congestion leading to more difficult and longer commuting, loss of an attractive rural location, strain on the local infrastructure and amenities, potential for increased flood risk
20	Decreased quality of life for employees as a result of increased urbanisation, congestion, travel time, etc..

Answers - question 8

Are there any other points you would like to make about this development not covered by the questions above (eg, your thoughts on whether the infrastructure around your location will be affected, the impact on travelling to and from your location, etc)?

Company	Comment
1	[no response]
2	I've heard that Granta Park, Chesterford Park & Babraham are all finding it hard to get companies to set up at their sites at the moment due to the general problems in UK biotech. They will find it a lot harder after Hanley Grange is built and the parks are less attractive. They will find it absolutely impossible to attract companies during the build. In fact, by the time the build is complete I wouldn't be surprised if half the existing biotechs have moved away and there are no jobs at all for anyone who will be unfortunate enough to live at Hanley Grange.
3	I remain to be persuaded of the economic need for this. There are a declining number of biotech jobs in the region.
4	Overall, the development is likely to put significant pressure on local resources including transport, social care, health etc with a consequent drop in quality of life
5	If this development is to help the Biotech community, why has nothing been done to help us in the past? Granta Park, despite its best endeavours, has been left out in the cold with regard to public transport - we have not one single public bus serving the Park and have to pay for our own 'Shuttle Bus'. Why has a cycle track to Cambridge, partly paid for by the Park never been completed? A few buses would make more difference to people here than an eco-town.
6	[no response]
7	No
8	The concept of an 'eco-town' seems flawed to me.
9	Did I mention the traffic – oh yes.
10	Already made above - undoubtedly public and private transport links would become more congested. Why is this necessary in view of existing planned developments (which have had proper planning & public consultation)?
11	The roads barely cope with the demand at rush hour as it is! Especially with the stupid 2-lane-in-1-lane-out roundabout which people use to queue jump...
12	If a reason for the development is serving the local biotech community, then this is just pie in the sky. All that will happen is that another commuter town will be generated, using the local stations for convenient access into London.

Are there any other points you would like to make about this development not covered by the questions above (eg, your thoughts on whether the infrastructure around your location will be affected, the impact on travelling to and from your location, etc)?

Company	Comment
13	The river Granta flows through Granta Park and one of our buildings is very close to it. I am worried that this development could cause flooding
14	See above
15	See previous answers
16	The main concerns I have are around infrastructure and the obvious inability of the local area to deal with a development of this size, it is simply planned to be built in the wrong place .I can see no way in which it will help the Biotechnology sector to develop in this area. In fact the effect of this development will be to impact negatively on the growth of the Cambridge Biotechnology sector. I believe strongly that this development will have a detrimental effect on productivity and staff retention.
17	[no response]
18	It's not directly related to [company] but my personal view from the general biotech perspective is that it is insane to be building on good agricultural land. Food and fuel prices are soaring and we'll need the land grow crop and biodiesel which will compete for space. With global warming, we are likely loose good agricultural land due to increased flooding. Building a large Tescos on the site so that more food is driven into the region from outside the region will just make matters even worse.
19	One justification for the proposed development is 'biotech is expanding in the area and is being held back by lack of affordable housing' but no data have been produced to support this notion. The developers seem gloriously unaware that biotech is in recession in the UK and it is increasingly difficult to find venture funding in that sector, particularly for start-up companies. I do not believe the biotech community in the area have been consulted prior to this survey. It is optimistic to say the least that the residents of Hanley Grange will be happy or able to function without cars given there are no major plans to improve infrastructure
20	The Hanley Grange proposal is an extremely poorly thought through concept. There are simply not enough jobs in the area to justify a development of this magnitude. Dumping a massive new town in the middle of the countryside in this way will substantially increase the number of people in the region that need to commute, be it locally (e.g., to Cambridge) or to London. The government can make the development as "eco" as it likes, but the increased carbon burden from the resultant increased commuting makes the whole idea a joke. This government has shown itself consistently unable to engage in "joined up thinking" on a number of key issues, and this is another of them.

Summary answers - question 9

Total number of companies responding	20
Total employees covered	625

Size of companies

min	1
max	360
mean	31
median	11

Breakdown of employees

post-graduates	237 (38%)
graduates	268 (43%)
non-graduates	121 (19%)

Appendix - other comments made by respondents, but not included in the survey

I am staggered by the sheer size of this proposal. I think it would be much better to extend places like Cambourne (and I live in Cambourne) than to build on pure Greenfield sites like this. The development will join up the five villages that surround it and totally ruin the character of the area. *[Head of Chemistry, Biotech Company, Chesterford Research Park – not included as response used from CEO of same company]*

I am against this development but don't want to complete the survey as I am already fighting the expansion of houses in the North Cambridge area where I live. I know this will make my commute very difficult, but I would rather it were here than where I live. *[Chief Executive Officer, Biotech Company, Babraham]*

I come in from Hitchin, Herts on a daily basis. Both the building of this development and the subsequent increase in population size in the area will have a direct effect on my journey to work. I can, of course only comment on this from a personal point of view. I am also concerned about the environmental impact such a development could cause. *[Consultant, Recruitment Agency, Chesterford Research Park – not included as not a senior manager of the company]*

Appendix - questionnaire

The following questionnaire was used

1. Are you aware of the proposed Hanley Grange development and, if so, how did you first become aware?
2. What impact(s) do you think the development will have on your company's ability to attract and retain staff?
3. Do you think that this development will have an impact on the environment in which you work that could impact the productivity of staff at your location? If so, which type of staff and in what way?
4. If the development goes ahead, would that affect the way in which you view the attractiveness or otherwise of your current location and, if so, in what way?
5. We have seen biopharma companies of all sizes move into and out of the area in the last few years. Do you think that this development could escalate or delay a future move for your company, and why?
6. What do you think will be the main upsides (if any) of this development to your company at your current location?
7. What do you think will be the main downsides (if any) of this development to your company at your current location?
8. Are there any other points you would like to make about this development not covered by the questions above (eg, your thoughts on whether the infrastructure around your location will be affected, the impact on traveling to and from your location, etc)?
9. Finally, could you let us know a little about the size and structure of your company by filling in the following table (estimates will be fine):

Ultimate nationality of your company or its parent (eg, UK, USA, etc)		
Number of employees at your current location		
Approximate split of employees by education level	Post-graduate (PhD, MPhil, MBA, etc)	
	Graduate	
	Non-graduate	

Bibliography

Copies of this report are available on the Cambridge Healthcare & Biotech web site.

www.chandb.com

Other reports and articles concerning UK biotech authored, or jointly authored, by CH&B staff are also available from the website.

Examples:

- “License or Buy? Current Trends in the Biotech Sector and Recommended Strategic Options: The UK Perspective” CH&B report, June 2008
- “Biotech Britain: Realising the Impossible”, New Statesman roundtable, May 2008
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