



LONDON CANCER HUB ROUNDTABLE

REAL ESTATE INFRASTRUCTURE
FOR CANCER INNOVATION

July 14, 2025

WELCOME REMARKS



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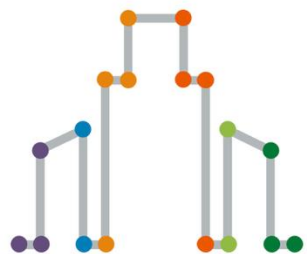
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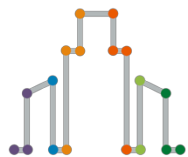
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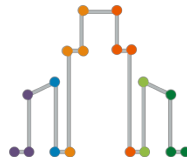
EVOLUTION OF THE ECOSYSTEM



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THANK YOU TO OUR LONDON/UK FOUNDING MEMBERS

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WHAT'S NEW FOR 2025?

UPCOMING EVENTS

BuildsBio.org/events



FLAGSHIP EVENTS

SAVE THE DATES

2025

SEPT
WED 10

**PHILADELPHIA
SYMPOSIUM**

OCT
WED 22

**NY METRO
SYMPOSIUM**

NOV
16-19

**LONDON/UK SYMPOSIUM
LONDON LIFE SCIENCES WEEK**



2025: A Year of New Possibilities



**Global Network,
Local Impact**



**Insider Market
Intelligence**



**Drive Innovation &
Industry Leadership**



**Partnerships &
Collaborations**



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INTRODUCTION TO THE LONDON CANCER HUB



THE TEAM

"Investing for the future is vital for our customers and it's vital for the UK. Aviva Capital Partners acts as a catalyst for projects that can generate income for our customers over long periods of time. These projects can provide great benefits to society – everything from the regeneration of towns and cities and social housing through to investment in green energy, and it takes Aviva to deliver them."

David Epstein,
MD Aviva Capital Partners



We invest to make places and communities more prosperous, inclusive and sustainable. This includes:

Regeneration, whether large sites, town and city centre renewal or working to redevelop major assets

Delivering homes, be it build-to-rent, affordable or for sale

Partnering with universities and the public sector to enable research and innovation.

Building place-based infrastructure like heat and local energy networks

Supporting decarbonisation through smart networks, mobility and connectivity solutions

We work across the UK and Ireland, partnering with developers, institutions and governments who share our ambition

SOCIUS

Socius is an impactful developer with a £2.5bn pipeline across the UK's fastest-growing cities including London, Cambridge, Bristol, Brighton and Milton Keynes. A privately-owned B Corporation, Socius partners with investors, leading architects and local communities to create inspiring and sustainable places, balancing profit with purpose.

We fundamentally believe that we need to maximise the use of the scarce resources that we have. This ambition drives us to seek out opportunities where we can creatively reimagine and rethink places to deliver long lasting change.

Change must deliver positive impact - that is our starting point. We are fixated with delivering local, social and environmental impact to the community, to customers, to investors and to future generations.

An architectural rendering of a modern, multi-story building with a glass and wood facade, labeled 'RESEARCH LAB' on the upper right. The building is surrounded by lush greenery, trees, and a paved plaza where several people are walking and sitting. In the foreground, a large, stylized orange text overlay reads:

**ONE VISION
ONE MISSION
TO DEFEAT CANCER,
TOGETHER.**

The ROYAL MARSDEN
NHS Foundation Trust



MAGGIE'S

ICR The Institute of
Cancer Research

The London Cancer Hub



Harris Academy
Sutton



Epsom and St Helier
University Hospitals
NHS Trust

Innovation Gateway

THE VISION

Our vision is to create the world's leading district for cancer research, treatment and commercial enterprise – a vibrant community of scientists, doctors and innovative companies, supported by state-of-the-art facilities.



Transactional medicine ecosystem

An environment that nurtures early-stage companies, from spinning out of the ICR to being incubated in the Innovation Gateway, the London Cancer Hub provides the ideal platform to develop the next stage for growth companies to scale up and thrive within the campus. The clinical trials capability of the Royal Marsden and the talent of Epsom and St Helier University Hospitals complete the translational medicine environment.



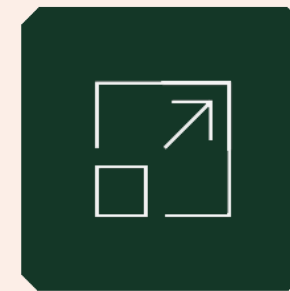
Inspiring and fostering wellbeing

The London Cancer Hub will create an outstanding environment for innovation and collaboration with vibrant public and community space, high-quality amenities, including cafés and urban spaces as well as excellent public transport making it a world-class ecosystem for a range of organisations from start-ups through to multinationals. This will be a place that enhances wellbeing by design, that includes nature and art and aids the recovery of people receiving treatment.



International reputation

The international reputation of the ICR and the Royal Marsden already makes Sutton the number one location in Europe for oncology research and treatment. The ICR has consistently been ranked either the no.1 or no.2 institution in the UK for biomedical research in the government's Research Excellence Framework assessment, discovering more new cancer drugs and cancer predisposition genes than any other academic organisation.



Critical mass

The site can provide at least 1 million sq ft of new build space which will enable the London Cancer Hub to become a commercial centre of gravity alongside the academic and clinical anchors of the ICR and The Royal Marsden, promoting collaboration between disciplines and institutions.



A nexus of scientific collaboration and partnership

The ICR, Royal Marsden and Epsom and Helier University Hospitals are fully behind the London Cancer Hub project and look forward to welcoming commercial organisations to the campus. Mutual benefits will include accommodation for spin-out companies, the translation of academic research, opportunities for scientific collaboration, the growing of the already excellent pool of talent, shared access to hi-tech facilities and equipment and a larger voice on the international stage for Europe's premier oncology location.



A place in its own right

The London Cancer Hub will be a fully functioning place, embedded in the local community. The hospitals, academic research activities and the Harris Academy school (specialising in STEM subjects) will be joined by incubator space, commercial space for high-growth companies, new amenities and ancillary residential accommodation for campus workers and the local community.



Sustainable

Sustainability is embraced across the project, with funding already in place from the Levelling-Up fund to enhance and increase the rail links between central London and nearby Belmont station. The award-winning Harris Academy school has already set the tone for new buildings, as the first Passivhaus secondary school in the UK.

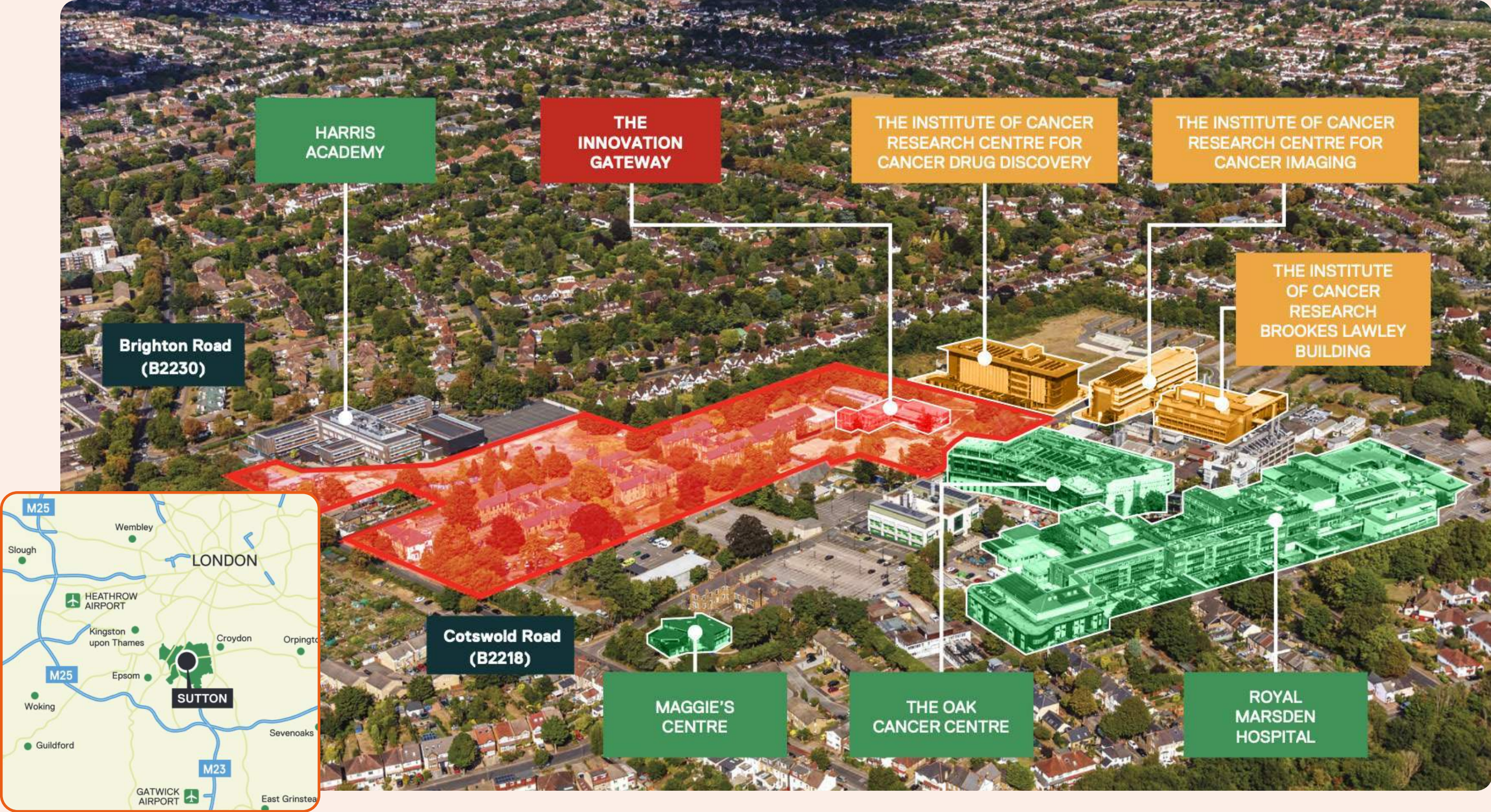


A home to investment and institutional commitment

There is substantial commitment to the London Cancer Hub from central and local government, from the NHS and the ICR. Recent investment includes the ICR Centre for Cancer Drug Discovery, the Royal Marsden's Oak Cancer Centre and Maggie's Centre. The ICR continues with their ambitious investment plans and Epsom and St Helier are planning renewal of their hospital accommodation.

THE SITE

Sutton 3 mins	Belmont 8 mins	Victoria 36 mins	London Bridge 37 mins	King's Cross 44 mins	Gatwick Airport 26 mins
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INSTITUTE OF CANCER RESEARCH

The ICR also has a successful track record in forming spin-out companies and helping attract investment to advance cancer research.

The ICR works closely with a number of organisations on research and funding and groundbreaking progress, including:



The ICR's success in translating discoveries into benefits for cancer patients hinges on its multidisciplinary environment and the breadth of its scientific expertise.

Researchers at the ICR are working across physics, radiotherapy, biology, chemistry and computational and data science to create innovative approaches to treat cancer. It's Sutton site houses a series of research centres, which draw upon its excellent pool of scientists and cutting-edge facilities to drive scientific breakthroughs. These cover a diverse range of fields and include:

Centre for Cancer Drug Discovery
The largest academic cancer drug discovery and development group worldwide. Its research teams cover every aspect of new drug discovery and development, from cell and molecular biology through to chemical synthesis of new agents and their evaluation in clinical trials.

Centre for Cancer Imaging
Cutting-edge imaging techniques to understand how cancer develops and responds to treatment to accelerate the discovery of new therapies.

Centre for Evolution and Cancer
Applies Charles Darwin's principle of natural selection within ecosystems to understand why cancer develops and why it is so difficult to treat

Clinical Trials and Statistics Unit
Leads the design, conduct and analysis of phase II and III national and international cancer clinical trials. Its findings directly influence clinical practice in the NHS and worldwide.

Drug Development Unit
A world-leading Phase 1 cancer trials centre, run jointly by the ICR and The Royal Marsden, which is carrying out around 50 trials of novel cancer treatments at any one time including many in collaboration with industry.

Key Facts about the ICR

Most successful academic organisation in the world at discovering new cancer drugs	1st for invention income per person of any UK university
One of the world's largest and most successful centres for phase I clinical trials	100+ years of cutting-edge discoveries
100+ active partnerships from small biotech and medtech to big pharma	Top 4 cancer centres worldwide for research and treatment
1st in the world for the percentage of publications cited in patents	21 candidate drugs, of which 13 have progressed to clinical trials
Top-ranked higher education institution for biological sciences and second for overall quality and impact (REF 2021)	1st in the UK for the proportion of papers published with industry
800+ scientists	

ROYAL MARSDEN HOSPITAL

The Royal Marsden is a world-leading specialist cancer hospital. It works closely with the ICR, its academic partner, to take laboratory discoveries rapidly into the clinic to develop better treatments for cancer patients.

The Royal Marsden opened its doors in 1851 as the world's first hospital dedicated to cancer diagnosis, treatment, research and education. Today, it operates as a specialist cancer hospital and National Institute for Health and Care Research (NIHR) Biomedical Research Centre (BRC) for Cancer, in partnership with the ICR.

At its hospitals in Sutton and Chelsea, the Royal Marsden treats over 59,000 patients from the UK and abroad every year. Many of these benefit from tailored treatment programmes achieved through the provision of molecular diagnostics – allowing doctors to determine which specific treatments will be of most benefit to a particular patient.

It is a centre of excellence with an international reputation for groundbreaking research and pioneering the very latest in cancer treatments and technologies, as well as specialising in cancer diagnosis and education.

Key Facts about the Royal Marsden Hospital

- 60,000 + cancer patients treated each year

300 patients take part in early-phase clinical trials each year
-
- 60 phase 1 trials at any one time

1 NIHR Biomedical Research Centre dedicated solely to Cancer
-
- ~ 25% of all cancer drugs licensed in Europe between 2000 and 2016 involve icr or royal marsden

World-leading clinical trials

The Royal Marsden and the ICR are internationally renowned for their work to conduct early-phase clinical trials, as well as later-stage clinical trials supported by funding or other resources from major pharmaceutical companies. Together, they are involved in nearly one-quarter of all cancer drugs licensed in Europe.

The Drug Development Unit (DDU), which sees around 300 patients per year, is one of the largest centres for phase I trials in the world and makes an important contribution to global efforts to discover and develop new cancer drugs. The centre runs around 50 early-stage trials at any one time – including trials of drugs being developed with industry partners.



Translational research

The ICR and The Royal Marsden work together across several centres to take discoveries from the laboratory rapidly into the clinic. These include:

NIHR Centre for Molecular Pathology

Aims to identify the molecular mechanisms that drive cancer and target them with a new generation of treatments.

Centre for Translational Immunotherapy

Brings together clinicians and scientists with an interest in translational immunotherapy.

Joint Department of Physics

Conducts and translates research and development of medical physics into clinical practice.

Joint Integrated Pathology Unit

Funded by The Royal Marsden Cancer Charity and the ICR, the Unit carries out pioneering research into diagnostics and combines the power of digital pathology and artificial intelligence.

Drugs trialled at the DDU that are now approved for treating cancer patients include abiraterone (Zytiga), olaparib (Lynparza), everolimus (Afinator) and belinostat (Baleadaq).

Researchers at the hospital are also involved in later-stage trials, including phase III drug trials funded by pharmaceutical partners, and influential, practice-changing investigator-led trials funded by charities and the government. They also have a very strong track record in radiotherapy trials.

LIFE SCIENCES ECOSYSTEM

London is establishing itself as a substantial global life science cluster, demonstrating strong credentials to attract and retain research & development organisations across the commercial and the academic spectrum.

Life science occupiers are pivoting their focus to London for a wide range of reasons including the deep talent pool thanks to London's world leading research universities and institutions.

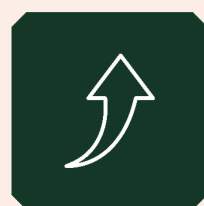
The UK is a global hub for life sciences – with a world-leading academic base, global pharmaceutical companies, and a rich array of SMEs and medical research charities. The sector continues to grow, with 2022 totalling £2.56 billion of venture capital investment in UK life sciences companies, the second highest on record behind 2021 and 19% higher than 2020.

The UK Government has set an ambition to invest 2.4% of GDP in R&D by 2027, rising later to 3%, driving further growth over the next decade.

Venture capital investors are backing biotech companies with notable initial public offerings (IPOs) of companies spinning out from academia – such as Monte Rosa Therapeutics, which was originally a spin-out from ICR science and listed on New York's Nasdaq stock exchange in 2021.



£2.56bn invested in UK life science companies in 2022, a 19% increase from 2020



4-fold increased demand for life-sciences real estate in London



2.4% of GDP investment by 2027, rising later to 3%



~45% of scientists at the ICR & The Royal Marsden are recruited from abroad

"London is the best place in the world to live, work and set up a company; and life sciences are a key part of London's DNA. This sector is fundamental to creating good jobs and to stimulating the growth of our economy while delivering innovations that save and improve people's lives, not only here but all around the world.

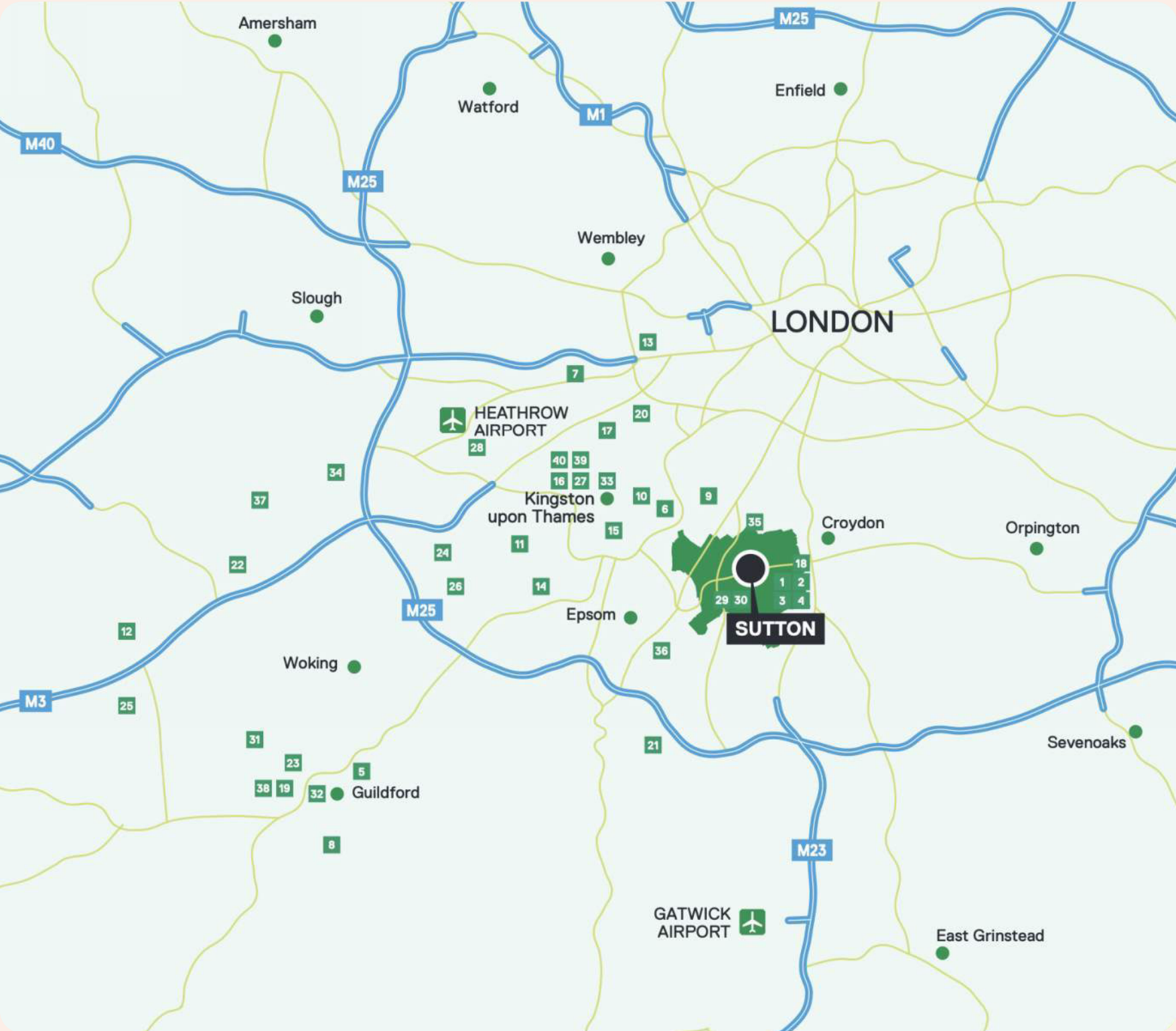
However, we know there is a shortage of space for life sciences R&D in the capital. We need more lab and business space that is flexible and affordable. The London Cancer Hub will help to meet this demand and generate an invaluable addition to our city's unique innovation ecosystem."

Rajesh Agrawal
Deputy Mayor of London for Business

SOUTH LONDON LIFE SCIENCES ECOSYSTEM

The expansion of the London Cancer Hub will reinforce its position as the focal point for a vibrant ecosystem. This wider ecosystem comprises research and clinical institutions, large pharmaceutical companies and a wide range of biotech and medtech companies.

Company	Sector / Activities
1 Elliptica	Biotech/ Pharma
2 Applied Biotech	Biotech/ Pharma
3 Curesponse	Drug Discovery
4 Vortex Biosciences	Biotech/ Pharma
5 Waire	HealthTech
6 Cisiv	Other Healthcare Technology Systems
7 Follo	HealthTech
8 Tachmed Healthcare Holdings	Other Healthcare Technology Systems
9 GripAble	Other Healthcare Technology Systems
10 Syndi (Information Services)	HealthTech
11 MyoMaster	HealthTech
12 viO HealthTech	Diagnostic Equipment
13 MindLabs	HealthTech
14 ConcR	Other
15 Genetic Microdevices	Diagnostic Equipment
16 Touchlight	Drug Discovery
17 Nurvv Run	HealthTech
18 RXLive (Healthcare Services)	HealthTech
19 SiSaf	Drug Discovery
20 AquAffirm	HealthTech
21 Pfizer	UK HQ
22 UCB	R&D
23 MedPharm	CDMO
24 Astellas Pharma	UK HQ
25 Syneos Health	UK HQ
26 Haleon (GSK)	Global HQ and R&D
27 LGC	Global HQ and R&D
28 Merck	Office
29 The Institute of Cancer Research	R&D
30 The Royal Marsden NHS FT (Sutton)	Hospital
31 Pirbright Institute	R&D
32 University of Surrey	University
33 Kingston University	University
34 Royal Holloway University London	University
35 Epsom & St Helier University Hospitals NHS Trust	Hospital
36 Epsom & St Helier University Hospitals NHS Trust	Hospital
37 Imperial College London (Silwood)	University
38 Royal Surrey County Hospital	Hospital
39 European Council for Cardiovascular Research	R&D
40 National Physical Laboratory	R&D



PROPOSED SCHEME



MASTER PLAN

The masterplan is organised around a network of open spaces with distinct character. From arrival spaces to community-centric gathering spaces, pocket parks or biodiversity rich zones, the district is designed to integrate an extensive spectrum of experiences.

Active spaces are predominantly located along the primary pedestrian corridor, at the heart of the site, whilst quieter, calmer environments are created around strategic perimeter zones, leveraging existing natural assets or conditions of the site.

An additional layer of local plazas and pocket parks establish a network of more intimate spaces, designed to welcome not just the working community, but visitors and residents alike.

- 1** Welcome Plaza
- 2** Welcome Pavilion
- 3** The Heart
- 4** East Court
- 5** Accommodation External Amenity Area
- 6** Allotments
- 7** The Woods
- 8** SECH Garden
- 9** Future Link Road

-  Outline application boundary
-  Detailed application boundary
-  Development plots subject to the outline planning application and included in the design code (B,C,D)





Up to 78,482 sq.m.

of life sciences space – that's equivalent to 11 Wembley football pitches dedicated to cutting-edge research and innovation.

Homes for up to 222 key workers

- 100% affordable
- Prioritised for London Cancer Hub workers



500+ jobs during construction

- with 30% expected to be filled by Sutton residents, boosting employment in the community.

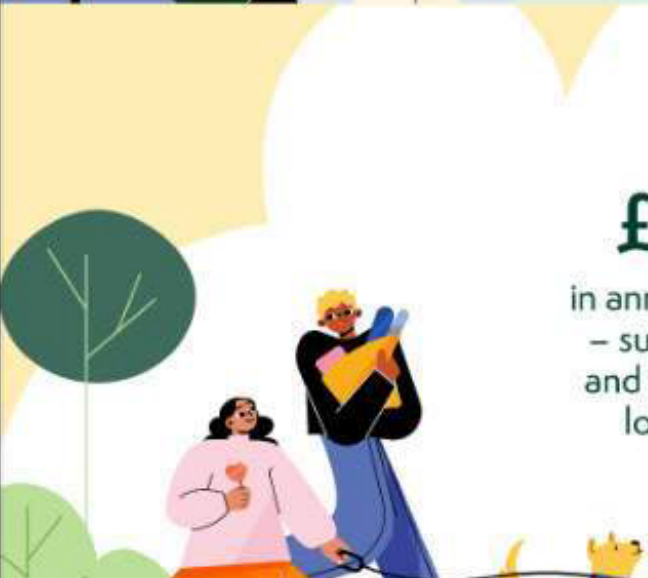
3,000 new jobs

on site when The London Cancer Hub is complete – including 1,170 roles for local people, supporting careers in healthcare, research, and innovation.



Science on Show

A welcoming space to explore the Learning Lab; meet, collaborate, and grab a coffee. Hosting talks, exhibitions, and workshops to engage the community, spark curiosity, and connect with scientists.



£11.9 million

in annual local spend by 2035 – supporting shops, leisure, and cultural venues, helping local businesses thrive.



£5.5 million

in annual business rates – funding vital public services and investing in Sutton's future.





LONDON CANCER DISTRICT



LONDON CANCER DISTRICT



Studio
Egret
West

London Cancer Hub

AVIVA
Capital Partners

SOCIUS

populate

PLACE & PURPOSE



Patients

Considering outpatients and long-term patients, providing spaces where to step away from treatment and recuperate in nature.



Wider community

A blend of spaces and destinations that are accessible to the surrounding community to make LCH an integral part of Sutton.



Visitors

Places that create a wider draw and entice people to step on a train and travel to experience the LCH site.



Employees

From scientists to support staff and independent entrepreneurs, the activities on-site will cater for everyone.



Elevate site attributes

Amplifying the positive features on the site, such as the mature planting and abundant nature spaces, to raise the profile of the site.



Activities and commerce

Integrating a host of activities that could appeal to a broad audience coupled with events and commercial opportunities



Curated spaces

Creating themed spaces and flexible spaces for a varied programme of events



People first

From car dominated to a place where people take precedents in safe open spaces that are activated, well lit and signposted

ACTIVATION & ENLIVENMENT



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NHS Foundation Trust



MAGGIE'S

ICR The Institute of
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The London Cancer Hub



Harris Academy
Sutton



Epsom and St Helier
University Hospitals
NHS Trust

Innovation Gateway



WHAT MAKES A REAL ESTATE ECOSYSTEM WORK FOR CANCER RESEARCH?



LESSONS FROM TOP PERFORMING US CLUSTERS

BOSTON • NYC • HOUSTON • SEATTLE



BREAK



UK BOTTLENECKS

- PLANNING
- LAND ASSEMBLY
- NHS STRATEGY



DESIGNING FOR THE

- SCIENTIST
- DEVELOPER
- THE PATIENT



PLANNING FOR THE UNKNOWN

- FLEXIBILITY
- RESILIENCE
- FUTURE SCIENCE



RECAP & NEXT STEPS

THANK YOU



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