

April 2021

Hubs of Innovation

A Playbook for Place Leaders

Executive Summary

The Innovation Economy after Covid-19

Innovation will be at the forefront of the UK's strategy for competitiveness through the 2020s. Innovation happens in places. This paper is about the pathfinding journeys that places pursue in order to host and deliver the kind of innovation that can underpin national productivity and local well-being.

For centuries innovation places have been central to the UK's economic story and success.

Place continues to matter hugely to innovation and we see this in countless ways in our cities and regions. Places allow research to spill over into enterprise in neighbouring buildings. They encourage a large company's innovative suppliers to learn from each other and develop new solutions together. They provide the kind of space layouts and affordability for startups to find their feet. They give institutions the chance to be close by for mutual advantage. They provide access for more people to take part in innovation and believe in its benefits. They give companies in weaker performing regions more ways to absorb and apply new ideas. Successful places deliver on many core national and local goals.

Yet in the UK these bonds between place and innovation have - by leading international standards - still yet to be fully articulated and embraced across levels of government, business and institutions. The roles of market activity and public policy in prospective innovation places sometimes remain crudely understood. There are unmet knowledge gaps about what kinds of physical environments, governance models, and community-building really do foster sustained innovation in different places, for different sectors, in different business cycles, at different points in their journey. In the pursuit of new and reinvented hubs of innovation, what often prevails is innovation by edict, zero sum thinking, ad hoc opportunism, and the dilution of valiant efforts.



The UK is now home to a smorgasbord of more than 100 established and aspiring hubs of innovation. Some of the world's finest research and technology has clustered in a relatively small number of locations, often without strong place-intentional efforts to amplify the collaboration benefits. Meanwhile several vanguard places have begun their journey towards becoming (once again) a genuine hub of innovation and optimising innovation's economic and social returns. Many others are aware of the potential but have not yet been supported to truly assess the value or viability of embedding innovation in place.

The UK is now attempting an ambitious feat - to expand and redistribute its innovation economy rapidly across a large number of hub locations, sectors and institutions. This ambition - in a post-pandemic context which demands an inclusive recovery - relies on more consciously joined up and sequenced approaches. There is a widely perceived need to share learning and scale insight among more places - be they city centres seeing a chance for the innovation economy to fill the vacuum left by the consumption economy, science parks diversifying into vibrant connected communities, or districts looking to square the circle between innovation and inclusion.

Navigating a path to more innovation places becoming the best they can be, becomes an even more urgent task deserving of national dialogue, priority and peer-to-peer learning. Otherwise the risk is that the laudable quest for more hubs of innovation is undertaken without the full capacity, knowledge or guiding compass to succeed.

This paper has been co-created in the form of a handbook in order to crystallise some of this common knowledge, and so provide guidance to places at many different stages of maturity and development. It is inspired by the experiences that dozens of places in the UK and around the world have found salient at key points in their 21st century story so far.

This handbook can be a timely and ongoing resource to many places in the UK: those that have been doing the groundwork and are now ready to really accelerate on their path to becoming internationally recognised hubs of innovation, and those that are reaching key decision stages about what kind of innovation location they have the potential to become.

The stages and ingredients identified in this paper are designed to inform and equip all those who have an interest in supporting a specific place to succeed. This includes the network of public and business leaders upon whom all innovation places rely. It provides tools to assess progress, diagnose problems, confront choices, and access more insight.

We hope it complements the wider knowledge exchange, capacity-building and profile-raising that innovation places will seek in the months and years ahead, including via the expansion of the UK Innovation Districts Group that the Connected Places Catapult is supporting.

Of course the stages identified in this paper will never be a perfect fit with the story and trajectory of any given place. There is no one single path. Equally not all ingredients for innovation in a place can be (nor should be) scripted in advance. Instead, by assembling the insights of those reporting back many years after they began negotiating their own path, it offers a user-friendly resource for those seeking to consider what they may have missed or need to anticipate in the times ahead.

We hope this handbook is used by leaders, decision-makers and place champions to:

Get more innovation places right from the start.

Honestly reflect on the merits and limitations of a given place opportunity.

Develop robust and patient strategies grounded in good international practice.

Understand what is needed from others, and wanted by prospective partners.

Be ready for when things don't go according to plan.



Contents

| | | |
|-----|---|----|
| 1. | Why Innovation Places matter | 10 |
| 2. | The UK's Innovation Places Landscape and Direction | 17 |
| 2.1 | Who owns and runs innovation places in the UK? | 22 |
| 3. | The Path to Innovation Places: Six Stages | 26 |
| | The Path | 27 |
| | The 6 stages of the Journey | 30 |
| | STAGE 1 Ecosystem Enablers | 34 |
| | STAGE 2 Audit | 40 |
| | STAGE 3 Setup | 45 |
| | STAGE 4 Foundation | 50 |
| | STAGE 5 Growth | 56 |
| | STAGE 6 Critical Mass | 61 |
| 4. | After Covid-19: connecting up the UK's Innovation Places as they pursue their critical path | 66 |

1 Why Innovation Places matter

Place, Productivity and Purpose after Covid-19



Place, Productivity and Purpose after Covid-19

Covid-19 has shaken up the geography of innovation in the UK.

The pandemic is redistributing how innovation takes place. Companies, institutions and entrepreneurs have been embarking on unprecedented adoption of new technologies and practices, pursuing new kinds of flexibility in where and how they operate. The forced acceleration of digital means that high-productivity industries and firms are likely to depend on a blended version of proximity - physically and virtually. How and where the UK accommodates these new trends and supports more people, companies and communities to adapt to them will be key to foster overdue productivity improvements nationwide and in turn underpin an inclusive recovery.

At the same time demand for place innovation is amplified. As an agent of change, Covid-19 has produced more appetite for new products, improvised solutions and common endeavour to tackle big societal challenges, translated into the hardware and software of places. How to simultaneously heal scarred urban economies, reinvent the revenue model of industries, reimagine mobility systems, decarbonise built environments, and enhance the way places and services are managed, is now a profound priority.

In this context the number, variety and contributions of innovation places has the potential to grow. The innovative success of more places is important if the UK is to enhance its position in strategic industries and technologies, empower the country's 'lost Einsteins*', and make much more of the relationships between research, business and community. But what is the path of these places? How do we support more to succeed and deliver whole-place, whole-region and whole-of-UK impacts?

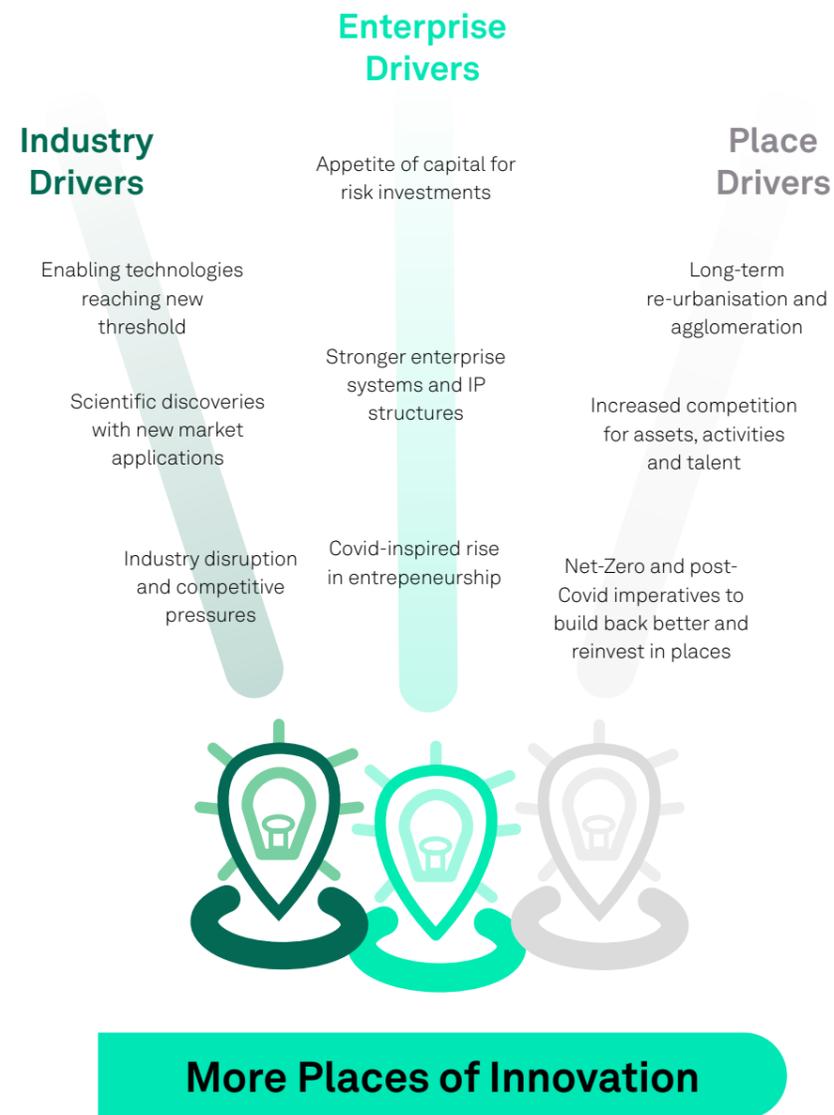
What makes places of innovation different to other places?

Innovation Places are distinct locations in the UK's economic fabric. They stand out from other kinds of place in at least three ways:

1. They have to continually foster and adopt new enterprise models, new technologies, and new practices, in playing host to larger numbers of SMEs and innovative organisations.
2. As places they have to be innovative – in the way they make technology available, the flexibility of layouts they provide, the open innovation activities they host, and the urban environments conducive to tacit knowledge creation in work and non-work settings.
3. The pandemic's profound disruption to urban and metropolitan economies creates a compelling imperative to enlarge the share of our economies given over to innovation.

* A. Bell et al (2017). 'Who beomes Inventors in America?' Equality of Opportunity Project

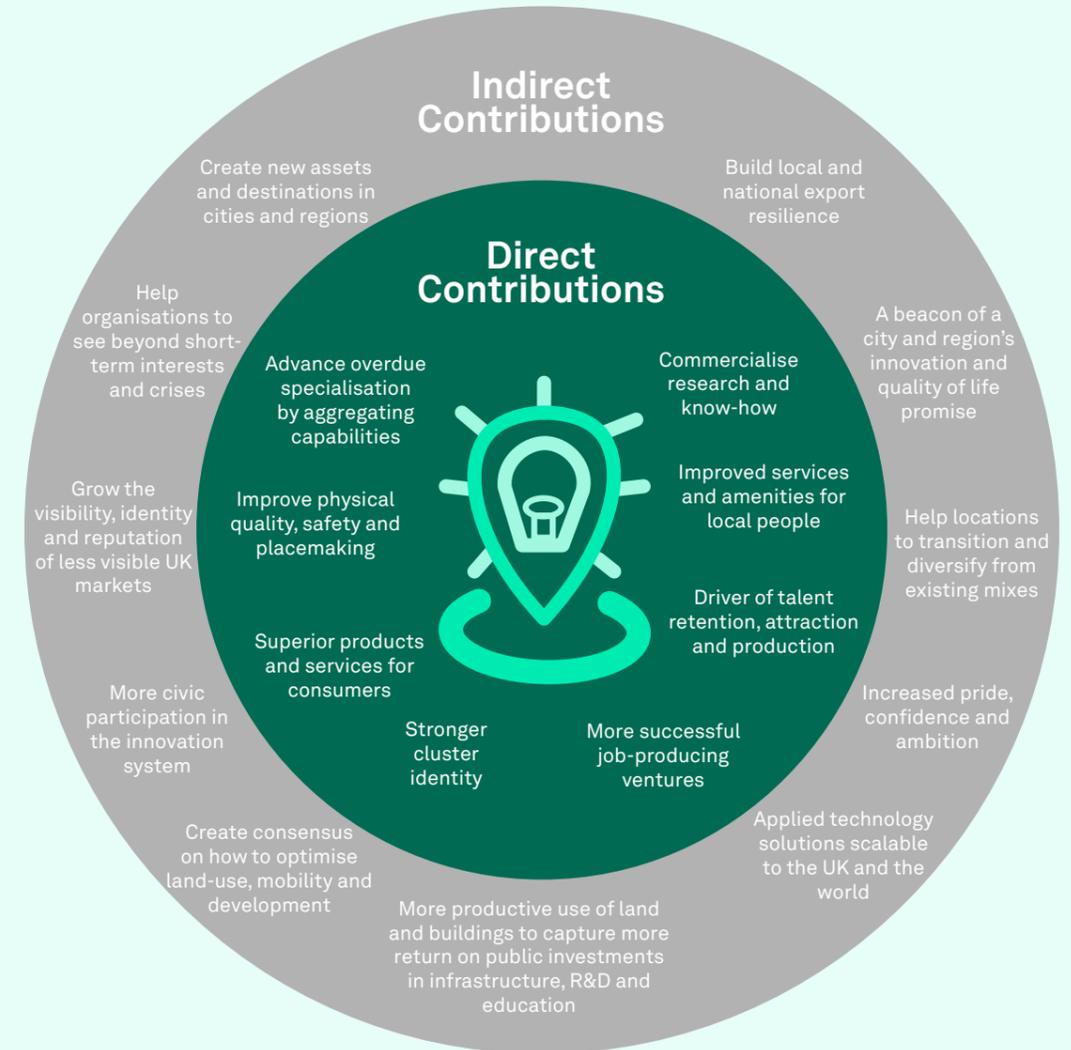
Figure 1: Drivers of Innovation Places in the UK in 2021



As the UK emerges from the confluence of Covid-19 and Brexit, and ramps up efforts to confront climate change as host of COP26, the role of innovation places deserves renewed attention and collective focus. Given the amplified benefits these

places can generate for people in terms of productivity, capability, profile and community, there is a clear case for them to receive more strategic focus and peer-to-peer support into the 2020s.

Figure 2: The observed local and national contributions of innovation places



This report identifies more than 100 places of innovation across the UK and provides guidance to those at many different stages of maturity and development. Designed to inform and equip the network of leaders upon whom all innovation places rely, it provides tools to assess progress, diagnose problems, confront choices, and access more insight.

The handbook draws on 10 years of international experience working with innovation districts, corridors and campuses, along with interviews and insights from UK leaders and stakeholders across more than 30 innovation places in 2021.



Why is this handbook needed?

- Because many more places of innovation in the UK have now reached a key point in their design, development or acceleration stage.
- Covid-19 creates unprecedented challenges for the anchors, users and beneficiaries of many of the UK's most established innovation places.
- There are no systematic or comprehensive resources available that have been designed with UK-specific governance and place conditions in mind.
- Most innovation places are run or led by teams with limited time or capacity for dedicated global research.
- Many UK innovation places do not have the experience of executing a long-term approach to delivering whole-place return.
- The distinct roles of government, business and knowledge actors in activating and sustaining an innovation place are only partially known and understood.
- The shared UK knowledge base about the relationships between technology, land use, clustering, governance, placemaking, promotion and community engagement has room to expand.

Innovation places require attention to wider ecosystems, and when the conditions are right, place leaders have to adopt a range of tactics in order to build demand, appetite and co-ordination. Their success requires a collective effort.

This handbook serves those who have interests in supporting a specific innovation place to succeed, whether the place is established, emerging or potential. It is intended to complement the wider work of cities and regions to foster the demand side – the skills, the networks, the clusters, the story, the planning, the governance, the capital, the entrepreneurship – that is also required for places of innovation to flourish.



Who should read this handbook?

Innovation places rely on knowledge 'liquidity' between different players in the ecosystem - investors, landowners, developers, policymakers, vice-chancellors, civic leaders, entrepreneurs. Alignment in perspective, know how and strategy - aided by high information flow - is especially important for these kind of places to succeed.

Each can play a catalytic role in enabling an innovation place to achieve scale and critical mass.

This handbook is designed for all such leaders and larger stakeholders within innovation places that have so far benefited only from limited networking or collaborative strategy.

What is this handbook not?

- X A definitive recipe to be followed to the letter.
- X A substitute for a strategy for the wider city/region economy and ecosystem.
- X A bespoke diagnostic for every kind of innovation place.
- X An assessment or endorsement of the relative potential of different innovation places.

2

The UK's Innovation Places Landscape and Direction



Supporting the journey of the UK's innovation places firstly requires a clear account of where the UK is today in 2021.

Places around the UK have been synonymous with innovation for more than 200 years. Neighbourhoods such as Ancoats in Manchester, Hockley in Birmingham and Govan in Glasgow were global capitals of innovation during the industrial era. They pioneered locally – in tight networks of cotton spinners, medical scientists, shipbuilders and metal producers - many of the inventions, processes, and ideas of the enlightenment age and the industrial revolution. Places in London, Edinburgh, Cambridge, Liverpool, Sheffield and around the UK have been home to Nobel Prize winning discovery and numerous other inventions that shape our lives today.

In the modern era, the UK is now entering its 5th cycle of innovation places since the first organised science parks took hold in the 1960s and 1970s.

In the **1st cycle**, science parks and business centres were established outside of cities to enable tech transfer. Many gravitated around large government R&D facilities. Incentivised by the efficiencies of selling space to larger businesses, these commercial locations tended to achieve a high level of occupancy, and many have endured successfully. However most did not consciously specialise and their long term effect on innovation and place development has been limited. Many of these places now confront dilemmas around connectivity, porosity and appeal to drive the talent, profile and collaboration they depend on.

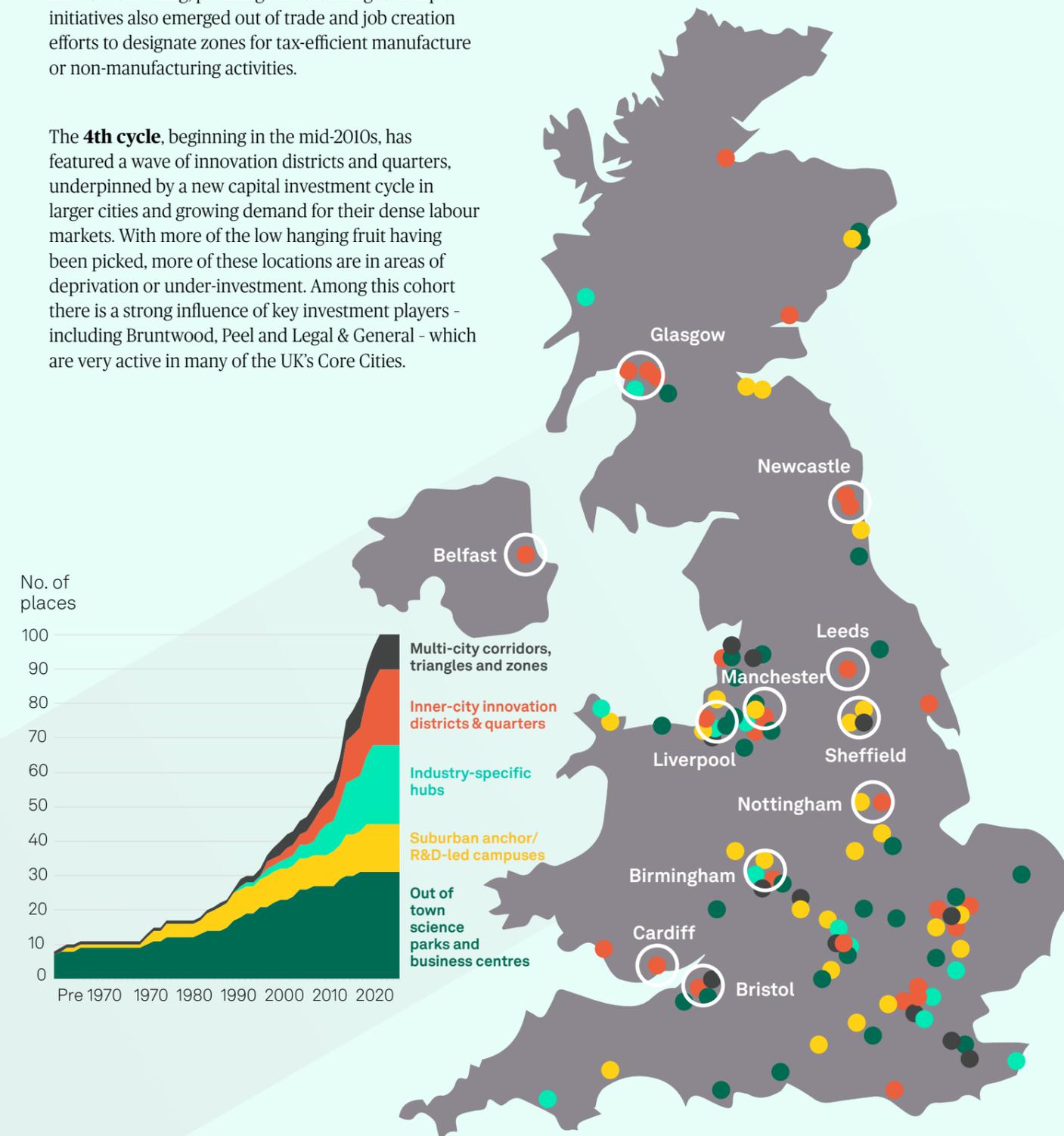
In the **2nd cycle**, the growing imperative faced by universities to commercialise saw more campus and incubator initiatives established. At the same time, sector-specific hubs were created in newly emerging sectors such as media, life sciences and advanced manufacturing.

The approach to innovation was typically more network and services based than strongly place-based. Many buildings and places established themselves as the “pebble in the pond” driving value in the radiated area.

In the **3rd cycle**, from the late 2000s, the UK saw the rise of several innovation triangles and corridors, motivated by the perceived need for places to compete on scale in a much larger international investment market. These larger locations have required a different kind of convening, planning and branding. Other place initiatives also emerged out of trade and job creation efforts to designate zones for tax-efficient manufacture or non-manufacturing activities.

The **4th cycle**, beginning in the mid-2010s, has featured a wave of innovation districts and quarters, underpinned by a new capital investment cycle in larger cities and growing demand for their dense labour markets. With more of the low hanging fruit having been picked, more of these locations are in areas of deprivation or under-investment. Among this cohort there is a strong influence of key investment players - including Bruntwood, Peel and Legal & General - which are very active in many of the UK's Core Cities.

Figure 3: Map of Places of Innovation in the UK and evolution of types over time.

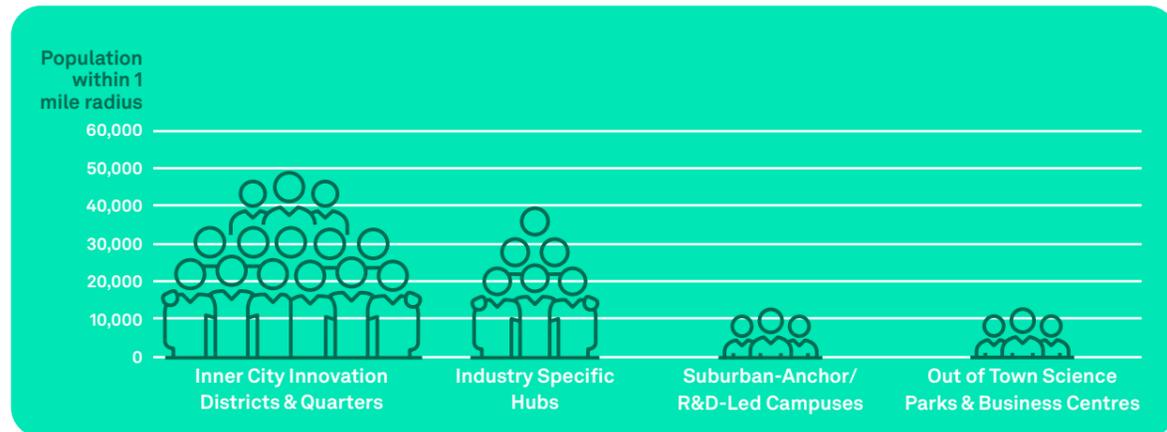


These cumulative cycles mean that today **more than 100 innovation places in the UK** can be observed, each with their own path, specialisation and leadership (see Appendix). These are distributed across the country, including among all of the Core Cities and many towns. As such their success is now an important vehicle to accelerate levelling up.

These places are among more than 1000 explicitly identified innovation districts and other place formats around the world. Many of these (especially in North America and Central Europe) are at a more advanced stage of specialisation, co-ordination and durable financing.

The different origins and purposes of UK places of innovation means that in 2021 they inherit very different physical fabrics and surrounding densities. Although more than three quarters are in metropolitan areas, only the more recent minority are in medium or higher density cities. This means they possess very particular needs in terms of mobility, placemaking, development and connection to wider markets. Infrastructure and connectivity is often at the heart of their strategic requirement.

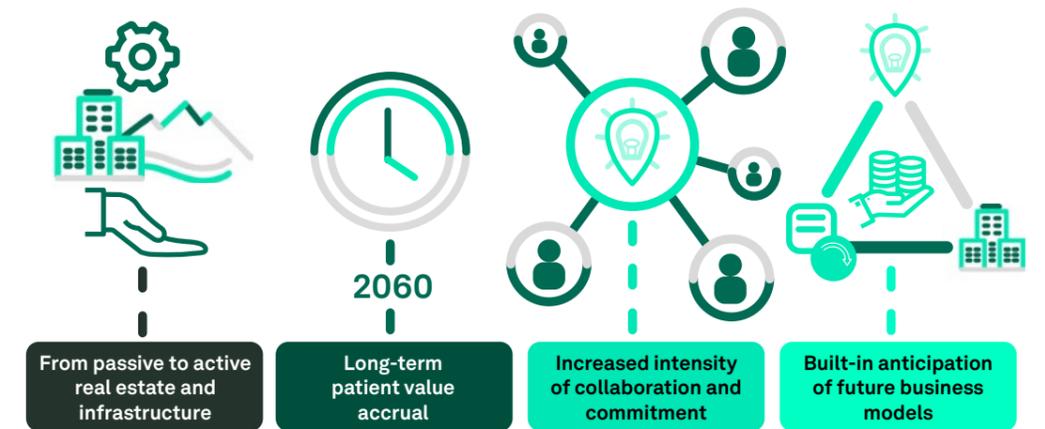
Figure 4: Different population and density character of different UK innovation places



There are a number of features that mark the most recent phase of the journey for innovation places, especially since 2017.

In particular there has been more recognition that buildings and infrastructures have to evolve from passive workspace provision into an active canvas and service for discovery. More places have recognised the need for partners with longer-term horizons, and for collaboration that hinges on greater frequency, quality and purpose. These factors rely on an increased leadership quotient and the importance of common identity and co-ordination. The soft arts and tactics of developing these attributes are one reason that innovation places increasingly seek to learn from and work with each other.

Figure 5: Shift in approach to recent innovation place approaches in the UK



Looking ahead: place meets purpose

A new and related dynamic in the current cycle is how place innovation can deliver local impact and address larger missions.

We can see the rise of dedicated civic innovation and mission-driven hubs designed to use place and infrastructure as a catalyst for new ideas, solutions and policies directed at larger societal challenges. Knowle West, Barking Riverside, Perth West and Queen Elizabeth Olympic Park are just four among many places being reimaged as test beds, whether for new technologies, new kinds of civic participation, or new modes of carbon mitigation.

This new generation of places has the potential to deliver long term economic impact partly through their potential to reconceive city systems and drive innovation in public investment, procurement and services. Access to patient, higher risk capital in civic assets and civic tech is often critical here. We can expect demand to grow for innovation places to become more impact-conscious as governments at all levels seek to deliver whole place return and foster innovation's social license to operate.

2.1

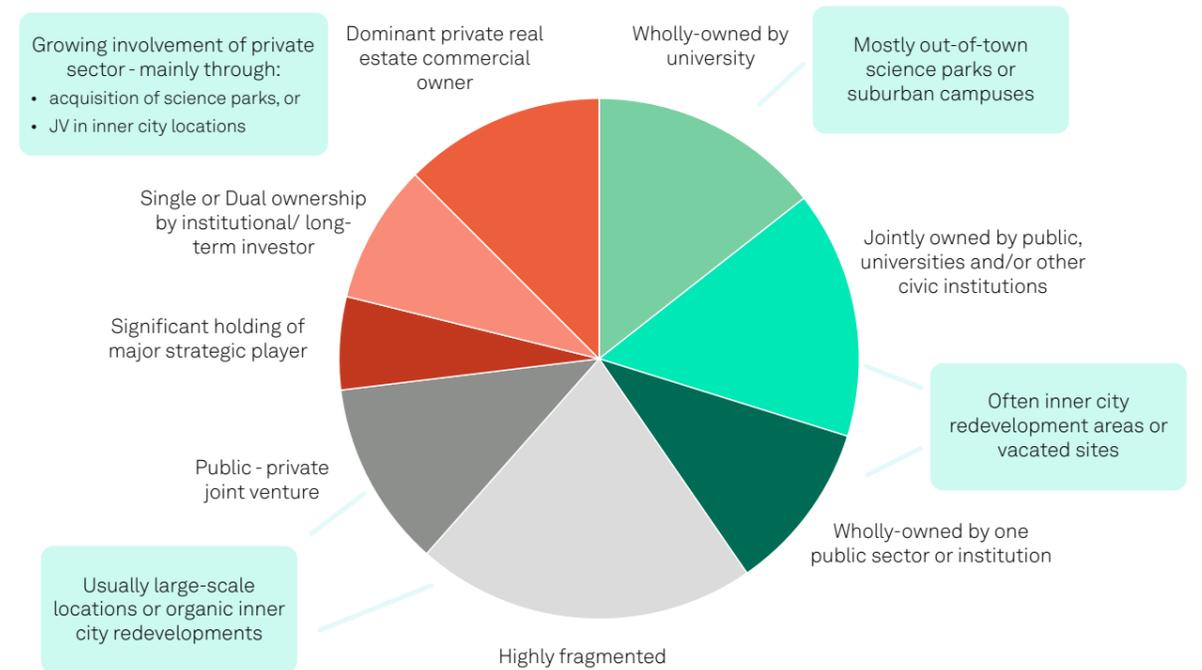
Who owns and runs innovation places in the UK?

The UK's mosaic of innovation places now consists of a complex range of owner and stakeholder profiles that is essential to understanding their path to successful growth and co-ordination. The origin of each innovation place, the original investment or policy driver, has often created a path dependency about who leads, who is involved and who is not, what goals are pursued, and how innovation outcomes are judged.

In general the more recently established locations, which are often in cities, tend to have more complex and distributed land ownership, even when place-shaping roles are often played by a major institution, local government or investor. This complexity creates healthy friction and also the ever-present risk of fragmentation or mission diversion. Very particular skills, tactics and mindsets are often required to keep the innovation show on the road.



Figure 6: Ownership models of 100 innovation places in the UK



The key stakeholders in most locations include:

- The major landowners and developers
- The university/knowledge anchor(s)
- Local government
- Larger businesses
- Operators and incubators
- Civic and non-profit organisations
- Venture capital firms and other investors
- Enabling organisations including LEPs and Central Government.

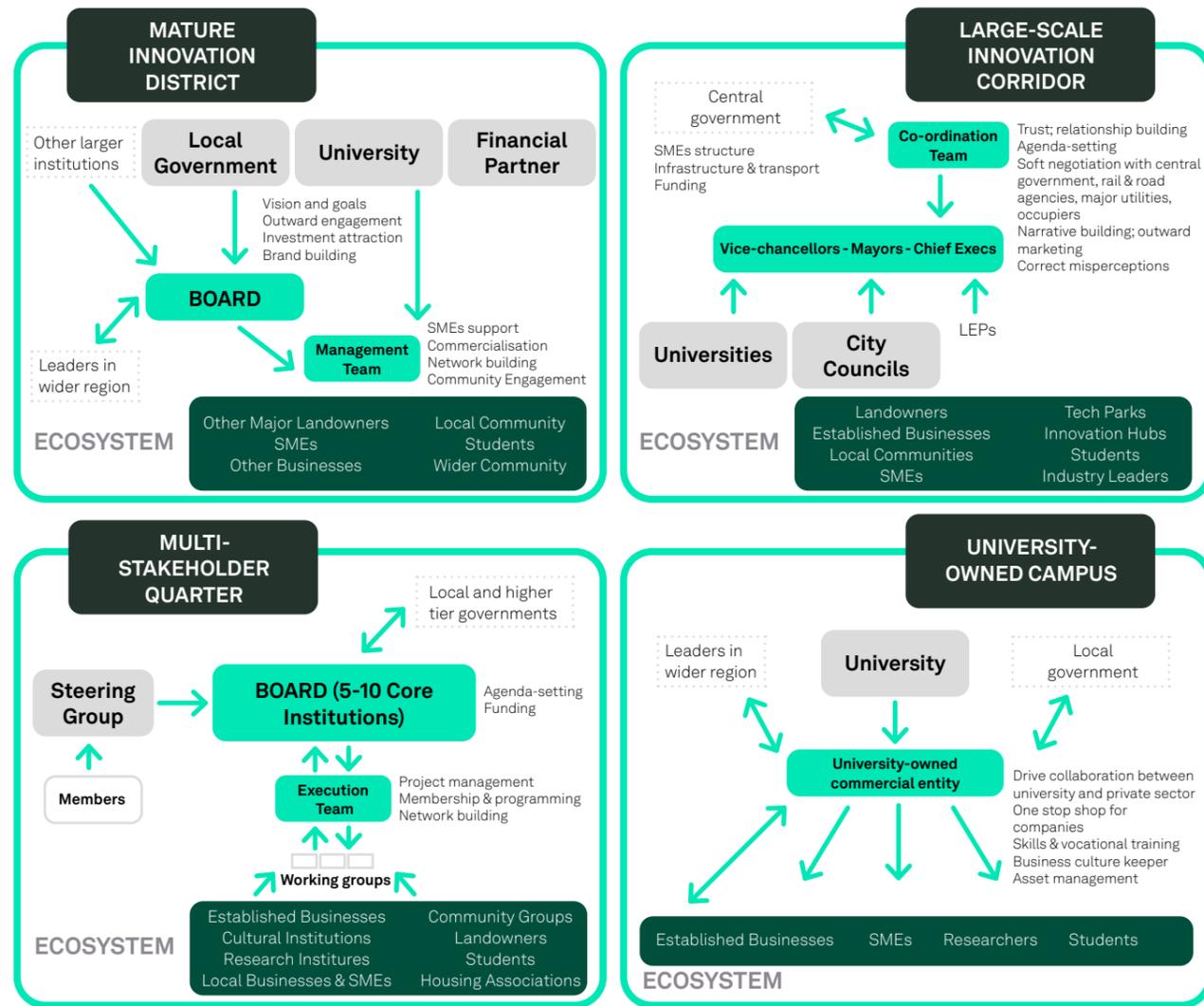
Each stakeholder tends to have different aims, incentives and time horizons which makes co-ordination both difficult and essential. Some are more incentivised than others to work patiently in a place to grow the high-growth business base and the innovation capacity. Some tend to be more easily distracted than others. They are also differently impacted by Covid-19 and have significant short-term crisis management imperatives.

There are nearly as many governance models as there are innovation places. However we can observe certain patterns and common aspirations in the way places are run and led. Four examples are illustrated below. They observe that in nearly all cases, innovation

places possess very lean formal management structures that are entrusted to deliver on a number of fronts. Small dedicated teams rely on the help, partnership and commitment of a wider board or steering committee.

In this context the quality and enthusiasm of the distributed leadership is a critical enabling or disabling factor for the progress of an innovation place. When certain innovation places benefit from committed, charismatic and bought-in leaders, they possess a high level of collaborative capacity. Others find it challenging to enlist or incentivise leadership to recognise the amplified impacts of having regular dialogue and building a shared approach to a place.

Figure 7: Examples of Governance Models prominent among particular types of UK innovation place



What we can also observe is that the leadership requirements of UK innovation places tend to grow over time.

This means whichever commitments to partnership are established near the start, the mechanisms to co-ordinate, co-invest and sequence activities usually need to build as the scale of demand and development grows. Innovation places soon have to think about building the networks and clusters, promoting a clear innovation story, and ensuring that public planning mechanisms improve confidence and flexibility and are choreographed with placemaking and real estate innovation. Increasingly their contribution to community, to cohesion and retention is also a priority.

Many are also engaged in fostering the demand side in order to deliver a fully-fledged innovation place. These are not 'part time' endeavours or 'add ons' to existing roles. They require dedicated skills and resource.

UK innovation places benefit from exceptional passion and dedication in their leadership. In 2021 the challenge is to equip these leaders with the tools, resources and catalysts to deliver whole place return in response to the economic shock of the pandemic.

At every stage of place maturity and leadership experience, this review has revealed common aspirations for wider place remit, more delivery skills and competences, greater integration, and inspiration from others (see Box).

What are UK Innovation Place Leaders saying in 2021?

Vision

"The essence of a modern-day [innovation place] is a community of people who share a common ambition, drive investor value, generate profit, and compete in a global market, in a wider context of a neighbourhood where they can rely on or be inspired by others"

"You cannot achieve full potential without integrating with the rest of the ecosystem, linking with the other pieces of the jigsaw"

"Still we have the question of 'what is the future of our place.' Is there really innovation, is there an innovation system behind it? The journey to achieve land integration is horrendously difficult. What we need now is continuity in the innovation vision"

Execution

"Our original niche focus was too narrow. Some centres around the world have narrowed and it was part of their success but for us, in terms of our audiences, we needed to broaden out. In hindsight we wish we had been more determined to get this changed from Year 1."

"We deliberately recruited people who have come from industry, and who understand what

industry wants. We found we need people who understand and communicate a value offer that is attractive to industry and establish operational principles to deliver that offer. This is not a natural skillset in our environment."

"What we need are champions: leaders prepared to be low-profile, long-term, patient and pragmatic."

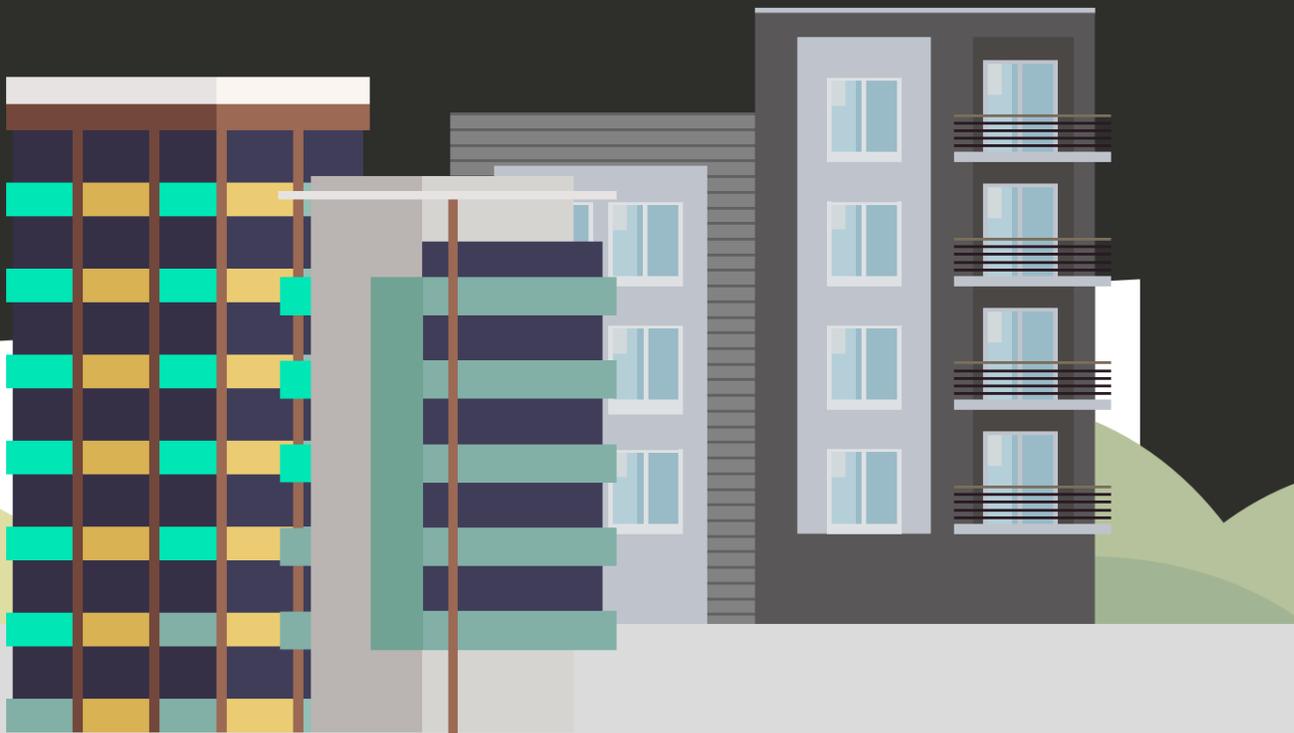
"We realised we need the ability to refuse occupiers, control the occupier mix, and discourage tenant competition. So what we need is some kind of Development Corporation, or at minimum a shared vision between 2 local governments. That is what we are working on."

Peer-to-Peer

"We'd love to better understand what other places are doing, and how they manage networks and ecosystems"

"We learned not to be afraid to ask for help - hosting people from different places. From that we started to think about the pathways for engagement, how are we going to scale the companies, and understand differences between SMEs and large businesses. That's how you get rich engagement."

3 The Path to Innovation Places: Six Stages



The path to delivering whole place return for an innovation place consists of many stages, spanning several decades. Diagnose what stage your place is at here, and review the common priorities that lie ahead.

No innovation place succeeds all at once. Whether a place initially evolves organically, or whether it is brought into being through external stimulus, its delivery of whole-place success requires patient interventions and intentional choices. International experience suggests that these choices are logically sequenced across 6 stages.

In the first instance, innovation places sit within a wider ecosystem of companies, research hubs, networks and convenors, upon which demand and vitality depends. Fostering this ecosystem is often an important first step, especially for regions where there are fewer drivers of demand, or where there is desire to unlock several neighbouring locations. Ignoring the ingredients that make up the ecosystem, or failing to nurture them, is one of the most common and costly mistakes repeated by governments and place advocates around the world. The result is often wasted public money and effort.

Increasingly, the path for places has had to become more intentionally navigated because of the level of behaviour change required for many parties, and the breadth of issues and risks that have to be proactively managed. The core aspects of the path that are most frequently observed are detailed in stages 2-6.

The precise mix of interventions is of course unique to each place. Yet three overriding themes remain priorities throughout:

Place and Connectivity: the development and making of a real sense of place, allied to agile mobility, with the spaces, platforms and connective tissue for collaboration.

Ecosystem and Community: the programmes, mentors, services, diplomacy and engagement to build trust across all levels of institutions and with local communities.

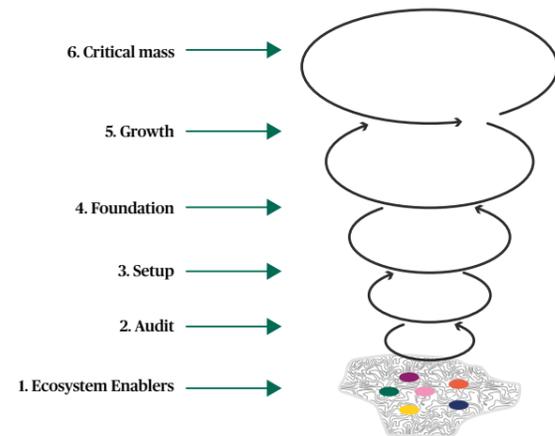
Leadership and co-ordination: the charisma, seniority, governance, finance, profile and commitment to drive disparate interests in a unified direction.

Each of these three areas requires different inputs, investment and skillsets, which is why an innovation place tends to need dedicated attention and budget to co-ordinating the requirements, rather than treating these as voluntary or optional add-ons to existing staffing. Without due resource, it is easy for places to accrue all of the hard assets and none of the soft powers, or vice versa. The result is sub-optimal innovation outcomes.

Over time, the scale of these three strategic themes - place, community and leadership - accumulates, as the full character and capability of a place comes into view. This means that the support and capacity required to manage them is higher for more established locations. Some of these dimensions are observed in the detail on the six stages observed below.

Key

Stages of the Journey



Ecosystem Ingredients

- Housing and Land Use policies
- Skills and talent appeal
- Digital, Civic and Open Data platforms
- Connectivity to markets
- Larger firms and future growth sectors
- Access to capital
- Enterprise-friendly pathways and regulation
- Government co-operation
- Proactive and risk-taking knowledge anchors

Location



Innovation Area



Figure 8: Illustrative example of a region with multiple places of innovation at different stages of maturity

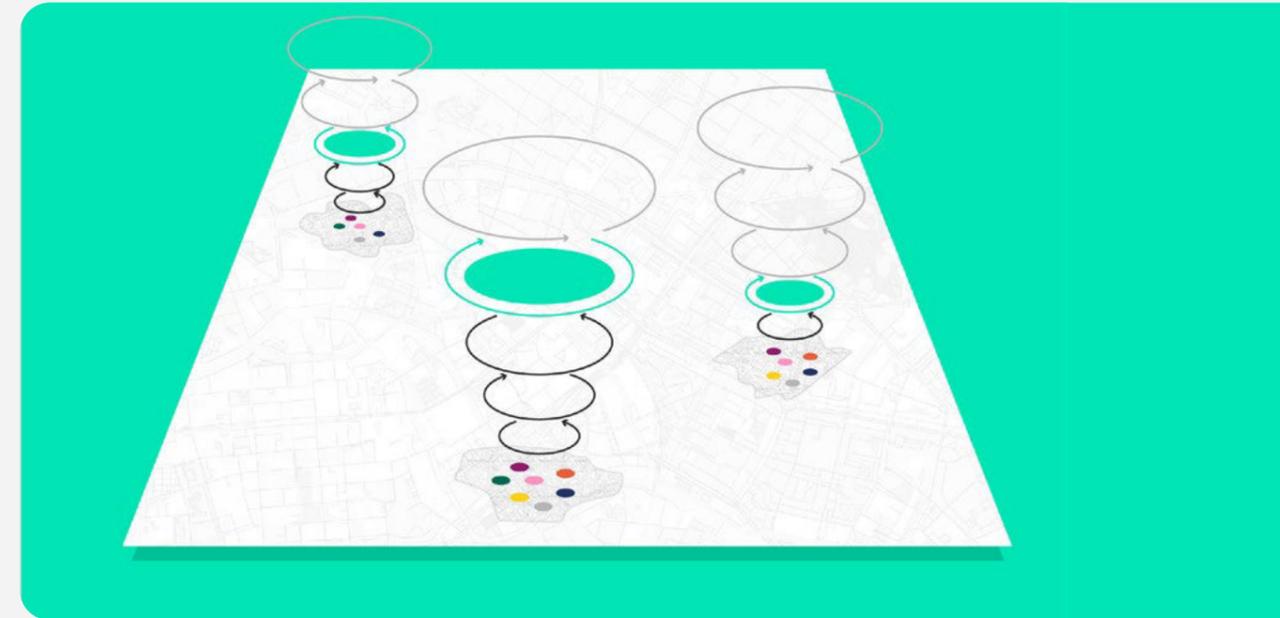
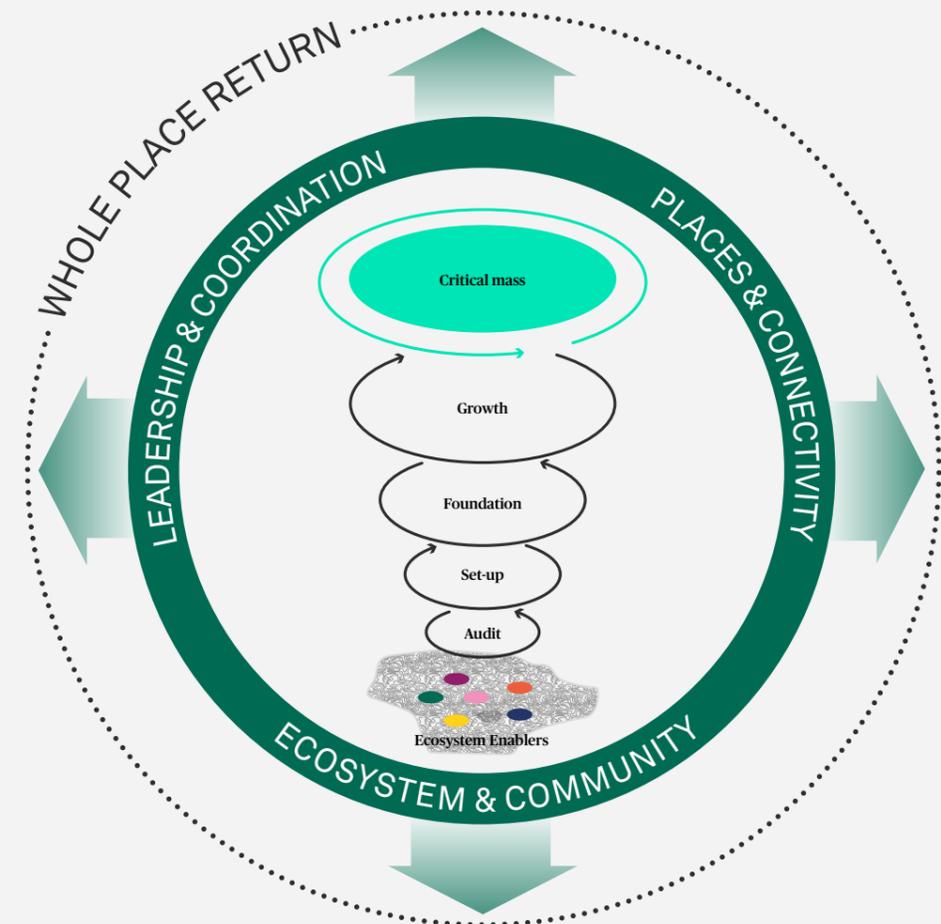
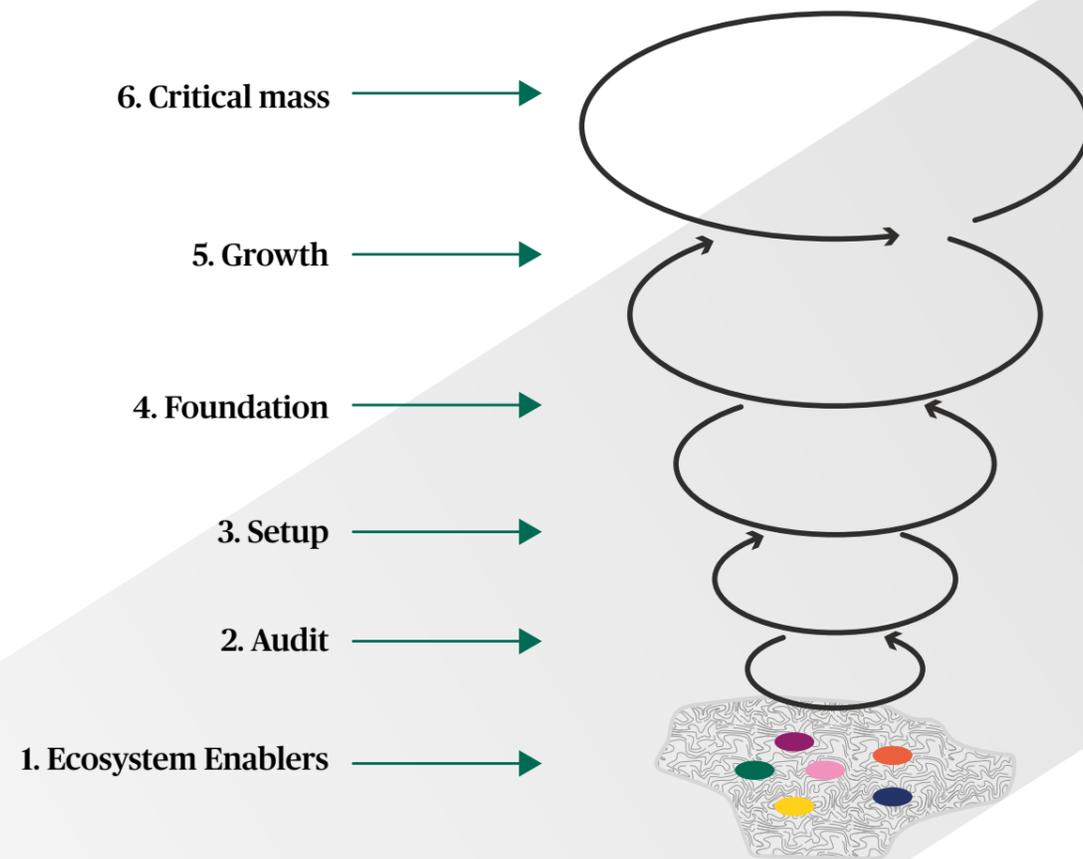


Figure 9: The Whole Place Return that is delivered when reaching the most advanced stages of development and co-ordination



The 6 stages of the Journey



Observations of more than 100 Innovation Places worldwide and many in the UK point to six common stages in the journey to achieving a whole-place return.

The initial stimulus that gives rise to an innovation place (e.g. a City Deal, an investment opportunity, a major event, or a new piece of infrastructure) means that not all places evolve in precisely this six-stage sequence. Many return to earlier stages once they have reached a certain level of stability. The stages outlined below reflect the sequence that place leaders and analysts found to be useful and logical at key junctures of their own journey.

- 1. Ecosystem enablers** are the start because they are fundamental to the viability and potential of an innovation place. Without a dynamic innovation ecosystem innovation places may be stymied in their efforts, which could lead to a waste of time and resources.
- Once ecosystem conditions are in place, an **audit** stage is usually essential to distil the real areas of future strength and assess leadership appetite. Without it, there may be limited evidence or credibility about the scale of the opportunity, confusion about the place purpose, or an absence of reflection on the differentiating features or the character of competition locally and internationally.
- If auditing has confirmed the value of an innovation place, leaders of the place move to a **setup** stage. This is when strategy building and partnership engagement accelerates. Timing is often very important in this stage, especially around tactical questions of land value and assembly.
- The **foundation stage** requires a first cycle of implementing the strategy. This is when a leadership team comes to the fore, and experiments with technology, partnership and governance are pursued.
- In the **growth stage**, innovation outcomes really flourish and project leaders are starting to embed the place's role in the wider social, environmental and economic journey of the region. Co-ordination tasks and challenges grow, and relationships and profile beyond the boundaries of the place become a more sustained priority. Project leaders are shifting their attention to wider city-wide or regional issues driving closer collaboration between governments and project leaders.
- In the **critical mass stage**, the place is delivering a whole place return. It provides a full suite of services and amenities to the innovation and resident communities. It is an identity builder for the whole region. Its influence and impact demands more dispersed leadership as space needs and relationships become more distributed. The place is a driver of value, know-how, design, belonging, and cohesion. At this stage of maturity there are choices as to how or whether to become fully integrated into the wider economic fabric, and how to foster experiments at a larger scale.

Many places in the UK are still in the ecosystem or audit stage. In these cases leaders and stakeholders have some familiarity with the innovation opportunity but lack confidence or action plans for how to develop them. Only some of the known place, ecosystem and leadership ingredients are observed and prioritised.

The majority of locations are in the setup and foundation stage, having achieved the first steps in an initial strategic cycle, and some clarity on assets, ambitions and partners. These places have fairly established stakeholder relationships, are aware of certain peers, and are using their available **resources and influence to seek continuous improvements and adjustments.**

Only a minority of innovation places are in the 5th or 6th stage, after completing a full cycle of fully strategic development. These places have accumulated a depth of experience with partners and stakeholders, and having learnt about the successes and limits of different collaboration mechanisms, are now internationally minded and eager to learn from more mature peers around the world.

How do you know what stage you are at?

| Stage | Indicators |
|---------------------------|---|
| Ecosystem enablers | <ul style="list-style-type: none"> The scale and specialisation of advanced industries is limited, still imperfectly defined, or immature. There are challenges connecting to markets, attracting risk investors and larger companies. There is not yet decisive agreement about where or what the 'innovation play' is in the region. |
| Audit | <ul style="list-style-type: none"> A clear opportunity and niche has arisen that demands robust assessment. You are still figuring out the precise spatial economy of the place and wider region. Knowledge of the full set of assets and institutions is patchy. The place profile and persuasion of key players has only recently begun |
| Setup | <ul style="list-style-type: none"> The place has reached a minimum basic threshold of companies, institutions, and demand. You are crafting the USP for the place and looking to get buy-in to the vision. The first new-cycle innovation investments are agreed, and 1 or more catalytic sites are underway |
| Foundation | <ul style="list-style-type: none"> One or more centres of gravity have picked up real momentum. An adjusted governance model is settling in. Collaborative projects and partnerships have been prototyped and implemented. The place's flagship status is enhanced through discoveries, signature tenants, and new forms of sharing and participating. |
| Growth | <ul style="list-style-type: none"> A tight consensus exists among core stakeholders. You are seeking additional capacity to match larger stakeholder demand and expanded place competences. There are clear opportunities to build the place's international profile. There is an imperative to support sub-locations and communities not prioritised in earlier phases. |
| Critical Mass | <ul style="list-style-type: none"> The place has begun to host a full spectrum of services and capabilities. The scale of innovation has spilled over into other locations, requiring clear alignment and more significant tools and investment. Storytelling, place DNA, ambassadors and alumni are all to the fore. The inclusive innovation mission is established across all organisations. |

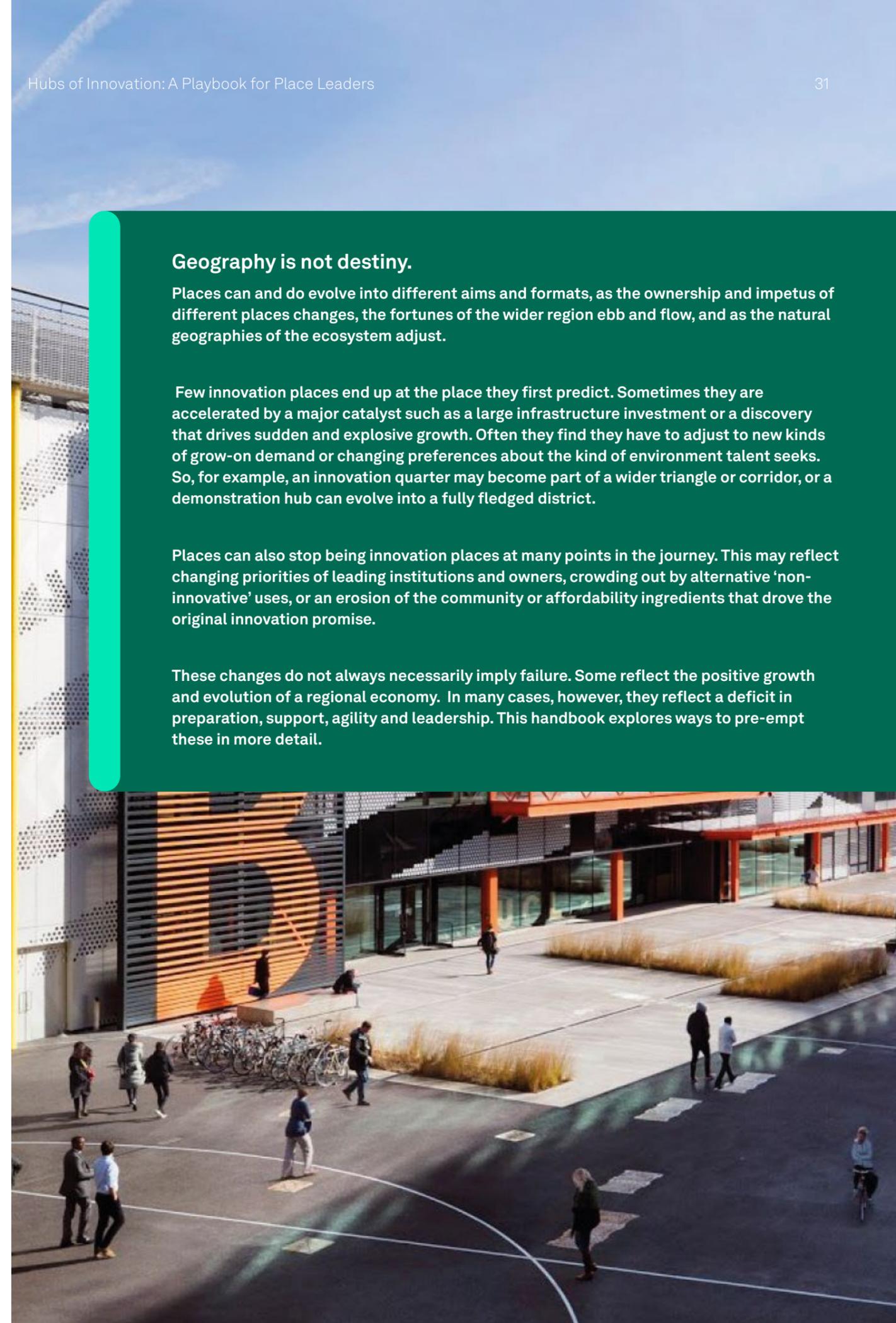
Geography is not destiny.

Places can and do evolve into different aims and formats, as the ownership and impetus of different places changes, the fortunes of the wider region ebb and flow, and as the natural geographies of the ecosystem adjust.

Few innovation places end up at the place they first predict. Sometimes they are accelerated by a major catalyst such as a large infrastructure investment or a discovery that drives sudden and explosive growth. Often they find they have to adjust to new kinds of grow-on demand or changing preferences about the kind of environment talent seeks. So, for example, an innovation quarter may become part of a wider triangle or corridor, or a demonstration hub can evolve into a fully fledged district.

Places can also stop being innovation places at many points in the journey. This may reflect changing priorities of leading institutions and owners, crowding out by alternative 'non-innovative' uses, or an erosion of the community or affordability ingredients that drove the original innovation promise.

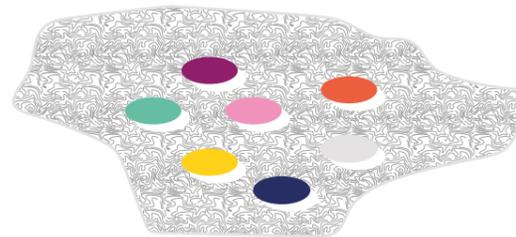
These changes do not always necessarily imply failure. Some reflect the positive growth and evolution of a regional economy. In many cases, however, they reflect a deficit in preparation, support, agility and leadership. This handbook explores ways to pre-empt these in more detail.



Ecosystem Enablers

1. Ecosystem Enablers

- Government co-operation
- Skills and talent appeal
- Housing and Land Use policies
- Connectivity to markets
- Digital, Civic and Open Data platforms
- Access to capital
- Larger firms and future growth sectors
- Enterprise-friendly pathways and regulation
- Proactive and risk-taking knowledge anchors



| | |
|--|---|
| Establish high information flow and networked knowledge among anchors and businesses | ✓ |
| Support a robust 'whole region' economic strategy organised around future demand drivers | ✓ |
| Identify the catalysts and barriers to access risk capital | ✓ |
| Proactively optimise planning agility and flexibility of land use | ✓ |
| Encourage open civic innovation platforms | ✓ |
| Enhance government co-operation and innovation appetite | ✓ |

1. Establish high information flow and networked knowledge among anchors and businesses

- Engage with key markets and encourage linkages through forums, business exchanges and delegations.
- Support convener spaces and leaders with a place-based perspective.
- Overcome disjointed mentality among existing spaces and parks.

2. Support a robust 'whole region' economic strategy organised around future market drivers

- Commit to a long-term approach that substantiates real sources of future competitiveness and makes clear choices about place and investment priorities.
- Re-assess the enabling infrastructure that will combine net zero performance with connectivity to growth markets nationally and internationally.
- Proactively confront local skills supply, pathways to enterprise, and future skills demand.

3. Identify the catalysts and barriers to access risk capital

- Understand the credibility of the wider location among risk-tolerant investors.
- Tackle public and private funding gaps for entrepreneurs, start-ups and scale-ups.
- Review opportunities to streamline processes, create a 'one stop shop' interface.
- Develop an open approach to place development to avoid conflict of uses.

4. Proactively optimise planning agility and flexibility of land use

- Update housing plans to accommodate for current and future population growth, while signalling priority for innovation uses.
- Ensure availability of land for purchase and development.
- Assess whether the use-mix and use-adaptability in key locations can adequately respond to new industry pressures after Covid-19.

5. Encourage open civic innovation platforms

- Create an open-innovation culture through challenges, open-data platforms and invitations to technology partners.
- Raise the public profile of innovation challenges and invite a broad base of inputs and ideas.
- Reform systems and the gateways to enable more points of engagement and stronger monitoring of ecosystem progress.

6. Enhance government co-operation and innovation appetite

- Build the collaborative governance at the at the larger metropolitan/regional scale and the combined competences they bring.
- Spot win-win place opportunities to overcome zero-sum mindsets and territorial differences.
- Demonstrate the willingness to adopt innovative solutions and try new models.

Common issues to avoid at this stage

- X Progressing to a specific place proposition while the depth of collaboration is still very thin.
- X Innovation narrowly conceived in terms of tech transfer rather than business and organisational culture, place, and talent.
- X Reliance on the expansion or internationalisation of existing institutions.
- X Assumption that the incentives and frameworks for place innovation lie exclusively at the national level.



Implications for leaders in wider region

- Grow and support existing innovation firms and activity, and maintain continuity of vision.
- Develop and drive long-term strategic partnerships to foster and convene the whole eco-system, encourage readiness for change, and incentivise bold solutions.
- Adjust the business climate and become as investment-ready as possible.

Implications for major landowners and real estate developers

- Pay attention to 'Covid-adjusted' tenant business models, workplace requirements and talent needs. Test and re-test the market.
- Intensify participation in the eco-system and deepen the 'service provider' instinct.
- Explore avenues to invest in enterprises as well as real estate, and look for shared goals.

Implications for local government

- Plan for growth and identify demand-led land development, infrastructure and relocation opportunities.
- De-silo departments to reduce information and co-ordination gaps
- Grow awareness of different models for procurement, entrepreneurship and risk investment.

Implications for universities

- Lead and participate in knowledge transfer activities. Identify where the IP is to inform what specialisations and innovative products can be made of it.
- Balance short-term asset management pressures with longer-term strategic perspective.
- Contribute to open-innovation culture by aggregating business demand to inform grant bids, co-creation of challenges, open-data platforms.

Implications for established businesses and SMEs

- Build 'absorptive capacity': recognise the value of new ideas and promote their adoption into commercial ventures
- Share know-how on the barriers to growth and competitiveness
- Become engaged advocates of the city/region future and new market opportunity.



Where to find out more

- Connected Places Catapult fosters the emergence of complementary ecosystem enablers by convening stakeholders across the ecosystem and helping developed [shared roadmaps](#) to an agreed destination.
- Mary Walshok's [account](#) of the 50 year journey to build San Diego's innovation economy provides some of the richest insights into how ecosystems and fostered and the roles of different players.
- In Leeds, participation in the [MIT REAP programme](#) has enabled city stakeholders to identify ecosystem barriers and implement underpinning programmes while a priority district approach takes hold.

Case study

Leeds Innovation District – Unlocking the ecosystem potential

Leeds Innovation District has picked up real momentum through a thorough evaluation of the innovation and entrepreneurial ecosystem.

Leeds is already well regarded as a destination for entrepreneurs owing to its distinctive digital and health tech specialisms, broad base of industries and diverse demographics which make an ideal innovation test-bed for UK and international markets. Despite the promise of its innovation assets and culture of collaboration, there is an ambition for innovation to drive commercial opportunity, diversity and a greater social impact.

This ambition is being realised as part of the strategy delivered from the MIT Regional Entrepreneurship Accelerator Program (REAP). In 2018, Leeds was the first city region in the UK, outside London, selected to be part of the programme. The 2-year action-learning process provided the framework, international benchmarks and impetus for senior leaders from across public and private sector to re-think the long term outcomes of innovation and co-create interventions to encourage a more connected innovation ecosystem. Its evidence-led approach has helped to focus on the region's capacity to grow new innovative businesses, nurture diverse talent and develop a culture amongst businesses to solve the big challenges facing the world today.

One initiative developed from the programme is BUILD, a pre-start accelerator which focuses on developing ideas with profit and purpose from diverse founders, and is the first step to addressing inclusion barriers that exist in innovation support.

Both the University of Leeds and its innovation hub Nexus have been key stakeholders with the MIT REAP process and the fostering of the wider innovation ecosystem. Nexus was one of the first projects to mature and become operational in the emerging innovation district. It connects businesses with research and

innovation expertise, talent and skills and facilities at the University, working together with businesses to de-risk innovation and maximise returns. Elsewhere, Leeds Beckett University is also committed to the growth and success of businesses in the Leeds City Region, a new £80m Arts faculty was opened in 2021 and designed to be a creative catalyst for new academic and industry partnerships.

The evolution of the innovation district has meanwhile been underpinned by the investment commitment of the universities and teaching hospital, which is a catalyst for the district's focus on health innovation. The Hospital working with Nexus and other partners has established an Innovation Pop Up to coalesce their health innovation capabilities and support industry focussed collaboration. This is the first phase of a wider redevelopment planned from 2023 onwards.

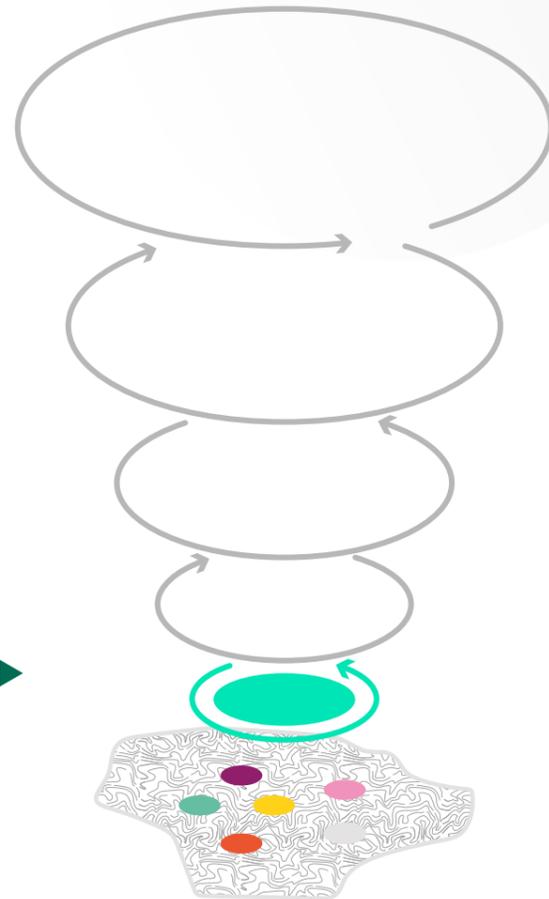
Leeds' experience has shown the importance of bringing place leaders together over and above their immediate organisational imperatives and towards a shared vision. The ecosystem context, together with these redevelopments, is already inspiring new collaborations, clusters and communities that are amplifying enterprise value and social impact.



Audit

| | |
|--|---|
| Comprehensively assess your innovation assets | ✓ |
| Confront your strengths and weaknesses head on | ✓ |
| Review whether the region really needs it and if senior leaders want it | ✓ |
| Spot the complementarities | ✓ |
| Identify catalytic stakeholders capable of influencing the whole ecosystem | ✓ |
| Look for potential quick wins | ✓ |

2. Audit →



1. Comprehensively assess your innovation assets

- Examine the strength of innovation anchors: what is really going to be unique for the companies or organisations coming to work there? In what ways can their brand drive advantage?
- Identify suitable locations as centres of gravity or with specific redevelopment potential. Appraise which activities may be usefully relocated to catalyse change.
- Consider neighbouring assets as constraints or potential partners in future follow-on strategy.

2. Confront your strengths and weaknesses head on

- Be honest about the value proposition versus other competing assets or opportunities, including international competition.
- Observe the biggest deficits in the physical place and the interaction environment, and areas with most capacity to improve. Assemble both qualitative and quantitative data to get a whole picture.
- Devise a credible plan for the critical weaknesses that may be a drag on growth and development.

3. Review whether the region really needs it and if senior leaders want it

- How many locations can the region sustain? Identify whole-region demand gaps regarding space, funding, community, scale-ups and commercialisation.
- Audit the leadership appetite and dedication, and whether the ambition can realistically match up to the resources at disposal. Develop a plan to boost collaborative capacity.
- Reflect on political, financial or social-license barriers that have potential to arise in future.

4. Spot the complementarities

- Ask what complementarity opportunities and activities exist in the region? Where are the productive crossovers between different tech/science/creative/manufacturing sectors?
- Establish common links and growth opportunities for disparate players.
- Assess potential for co-location, and the needs required in terms of space, platforms and conveners.

5. Identify catalytic stakeholders capable of contributing to the whole ecosystem

- Find the individuals in the ecosystem with the biggest networks of contacts and the highest appetite for transformation.
- Foster dialogue among landowners with the greatest place-shaping ability.
- Empower a charismatic champion to promote the place opportunity.

6. Look for potential quick wins

- Build the momentum through innovative programming, placemaking and tactical urbanism, and inward investment.
- Authentically engage surrounding communities and prioritise access to training, jobs and amenities. Future proof the district against sucking in talent at the expense of local people.
- Focus on the wider innovation brand that can underpin a place story.

Common issues to avoid at this stage

- X Omitting to enlist leading businesses in the process.
- X Rushed process responding to external incentives or deadlines.
- X Limited capacity and few channels to engage the full suite of partners and influencers to build awareness, buy-in and prioritisation.
- X Failure to benchmark against national or international peers.
- X Relying on selective data at the expense of wider insights, perceptions or stories.

Implications for place leaders

- Effectively visualised mapping of the region's firms (activities, sectors, sizes), research potential, growth sectors, and future demand.
- Tune in to the precise technology, infrastructure and revenue needs of companies in target market segments.
- Find initial interventions or agendas the wider stakeholder group will agree to.
- Maintain stakeholder focus early on.

Implications for major landowners and real estate developers

- Examine the full potential of science and innovation and the longer-term returns they generate
- Explore what investments are needed in the innovation community first.
- Confront what gaps others perceive in amenity, welcome, design vernacular, and porosity, and identify quick wins.

Implications for local government

- Review whether planning and decision-making agility is fit for, and receptive to, innovation place needs.
- Establish the appropriate role in coalition and community building.
- Confront any clear infrastructure and mobility gaps.

Implications for universities

- Review progress on research commercialisation and wider community interaction and mission
- Host, validate and endorse the wider change initiative, working with intermediaries.
- Seek capital partners with ecosystem expertise and patient approach. Look to buy up strategic assets owned by status quo land holders.

Implications for established businesses and SMEs

- Contribute openly to audit to reveal strengths and barriers to competitiveness: share data and participate in interviews and workshops.
- Ensure that entrepreneur voices are part of innovation and programme design.



Where to find out more

- Through its academic and business network, Connected Places Catapult can advise innovation places on how to get net-zero-ready, and facilitate pathways to translate more research into innovative, commercial products.
- The breadth and comprehensiveness of Austin's [market analysis](#) has empowered the district's stakeholders to identify clear action points for the growth of its innovation district.
- Dublin's approach to [scorecarding](#) its signature innovation place has shown how to sequence a strategy based on initial strengths and identify gaps to address in the following cycles.

Case study

Perth West, Perth, Scotland- Comprehensive auditing to establish a value proposition

Perth West is an ambitious effort to drive the green economy and support Perth's wider aspiration to become one of Europe's most sustainable small cities. Located on the western edge of Perth, connecting the city centre with the national trunk road network, it is an example of how patient and thorough assessment of a region's strengths and weaknesses can produce the basis for a shared vision and effective strategy building. It is the result of 8 years of public consultation, planning and collaborative research to identify economic drivers and innovation eco system, recognising the linkages between investment in infrastructure, climate change, future skills and jobs, and placemaking.

Audits of the city's smart and innovation capabilities have been critical to highlight the city's potential to establish its value proposition, recognise its growth strategies and identify suitable locations as centres of gravity. With different land uses and profiles, the four locations identified deliberately complement each other, and the sequencing of infrastructure development enables an integrated growth model to unfold, as data collected in the first phases will inform and drive the development of the following phases.

As part of its audit, Perth has recognised the need for a USP of social and global responsibility. In this early phase it is working on whole city clustering efforts and market building. Spotting the risk of silos, it has also prioritised a cohesive governance structure that integrates energy, mobility and digital systems and aligns planning, investment, enterprise and industry's interests with the city's strategy. This has been achieved through a Memorandum of Understanding between the Council and project promoters.

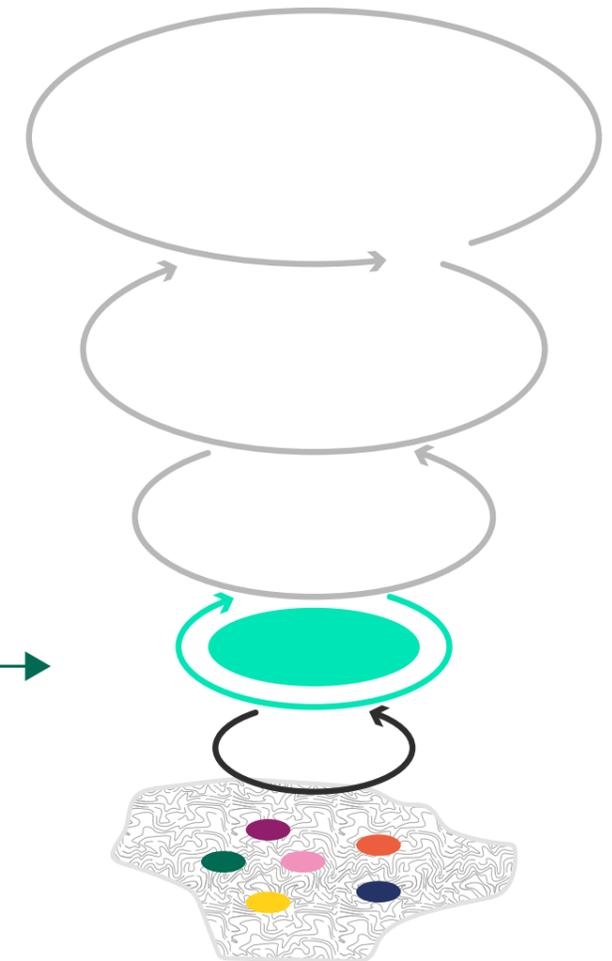
To facilitate the low carbon transition, the project leaders have adopted a strong early focus on pilots and demonstrators, and public infrastructure enablers. Enabled by the Tay Cities Deal, one of the locations, the Perth Innovation Highway, is a physical and digital corridor that aims to imagine the future of urban mobility land uses. It will be integrated with the 1st phase of the Perth Eco Innovation Park, that will include commercial and research facilities and public amenities with significant test space for urban mobility solutions including last mile delivery, MaaS, active travel and blue green infrastructure. The ambition is to set these uses within a local energy market and connect Perth West to existing and planned neighbourhoods through to the city centre, as part of a city economic and wellbeing strategy.



STAGE 3 Setup

| | |
|--|---|
| Establish a genuine USP | ✓ |
| Build a committed coalition of stakeholders and capital partners | ✓ |
| Define a credible vision and compelling narrative | ✓ |
| Develop an inclusive growth framework from the outset | ✓ |
| Embed flexibility and net zero principles | ✓ |
| Establish meaningful baseline, benchmarks and targets | ✓ |

3. Setup →



1. Establish a genuine USP

- What is the authentic world-leading capability?
- Sharply define the sector focuses, the specific set of specialisations, and related resources.
- Ensure that this USP is as differentiated as possible.

2. Build a committed coalition of stakeholders and capital partners

- Align interests, demonstrate shared value, and establish a clear single point of contact. Create serious capacity to manage the network. Avoid lock-in to the initial governance.
- Encourage and engage investor and developer partners that see the longer-term whole-place returns.
- Establish working groups dedicated to the investor offer, proposition for SMEs, enterprise programmes, and community. Make users aware they are part of an innovation place.

3. Define a credible vision and compelling narrative

- Build a credible story to get wider buy-in, a long-term vision that demonstrates wider benefits.
- Establish a 'whole place' perspective, not a narrow investment attraction formula, and communicate whole place intent.
- Showcase how the place is different to other locations, in calibre, character and mission.

4. Develop an inclusive growth framework from the outset

- Planning model that shapes a clear sequence of projects and priorities. Explore options for digital planning to make future choices transparent.
- Inclusive innovation underpins planning, housing and use choices.
- Develop early-stage working groups around training, procurement, diverse leadership, and social impact.

5. Embed flexibility and net zero principles

- Adapt planning and regulations to support co-location, flexible space, disruptive uses, and deter undesired uses
- Be vigilant that future development and space requirements are compatible with a net zero district.
- Sequence development to enable future expansion and anticipate crises and other shocks and changes.

6. Establish meaningful baseline, benchmarks and targets

- Set a baseline against which to measure year-on-year progress on strategy implementation and goal achievement
- Adopt road-tested, internationally relevant indicators to track innovation and place evolution.
- Avoid narrow GVA/jobs basis for impact assessment - explore impact tools that assess social value and tacit knowledge.

Common issues to avoid at this stage

- X Poor fit with investors' changing requirements.
- X Location was not motivated by real specialisation.
- X Lack of differentiation or grounding in wider place's DNA and expertise.
- X Set boundaries too rigidly.
- X Assume success comes quickly and fail to seed capitalise the change-making agents.
- X Restrictive framework inadvertently stymies or deters organic growth.



Implications for place leaders

- Recruit the coalition of willing senior leaders with experience and a wide range of profiles.
- Start to invest in the capacity and skills to broker relationships.
- Contribute to appropriate land and planning approvals for the development of a place

Implications for major landowners and real estate developers

- Commit to the vision: patient return, co-invest where required, and respond to post-Covid market needs in terms of workplace, use mix, experience and flexibility.
- Share development and management expertise and capability with other partners.
- Focus as much on what it is outside building, and the spaces of connection and collaboration.

Implications for local government

- Embed the role of residents and avoid an innovation/communities dichotomy.
- Consider head lease, provision of municipal space, or co-investment in catalytic buildings.
- Anticipate the follow on strategy - for 'grow on' space, housing and amenity needs, location synergies.

Implications for universities

- Set senior leadership example and recruit operational teams with industry-facing and community development experience. Avoid being seen as a barrier.
- Co-locate innovation teams and facilitate larger mechanisms for cross-discipline collaboration within and beyond university.
- Define programmes to attract, retain and develop talent to align with the place's direction.

Implications for established businesses and SMEs

- Contribute to sharpening the specialisation, the curation and the accompanying message. Do not leave it to others.
- Co-invest time and resources into the most forward-thinking collaborative programmes.
- Help place leaders establish meaningful metrics for success.

Where to find out more

- Connected Places Catapult facilitates early-place-stage learning, capacity-building and collaboration through various events such as [Challenging Procurement Series](#), [Virtual Connections Cafe](#), [Third Thursdays](#). It offers resources as to how place and innovation intersect.
- Oslo Science City commissioned a team to develop a digital twin to plot and inspire the vision for physical transformation.
- Newcastle City Council has found success via a formal joint venture with the University of Newcastle and L&G, cementing their shared vision to diversify the city centre, create jobs and boost



Case study

Belfast Innovation District - A high-trust coalition fostering innovation-led recovery

Belfast is an example of a city's public, private and academic leaders coming together to focus on a specific geographical district with the aim of catalysing the transformational benefits of innovation for the entire city and its citizens.

This leadership group 'Innovation City Belfast' has observed the advantages of agglomeration, scale, curation and prioritisation including the need to hone a smaller number of specialisms where Belfast really can be world class while at the same time taking a pro-active role in ensuring that inclusion is at the heart of the approach.

Innovation City Belfast membership includes Belfast City Council, Queen's University, Ulster University, Belfast Harbour, Catalyst and Invest NI. Its aim is to build out from an existing location in the city's Titanic Quarter, which over the past twenty years has attracted a confident community of innovators and entrepreneurs, facilitated by the presence of world-class academic and research expertise. The area has fostered strong clusters in FinTech, Cybersecurity, Life and Health Sciences and Clean Tech, and has been a key driver in establishing Belfast as the leading international investment location for US cyber firms.

The plan now is to grow out from this hub both physically - there is growing demand for more agile innovation spaces - but also in terms of the

ambition and reach. Through the Belfast Region City Deal, city leaders are seeking to invest over £320 million in new centres of research excellence, in advanced connectivity, in skills and inclusion programmes, and in mission-driven challenge funds, with the collective aim of inculcating digitally-enabled innovation to grow the regional knowledge economy to ten times its current size.

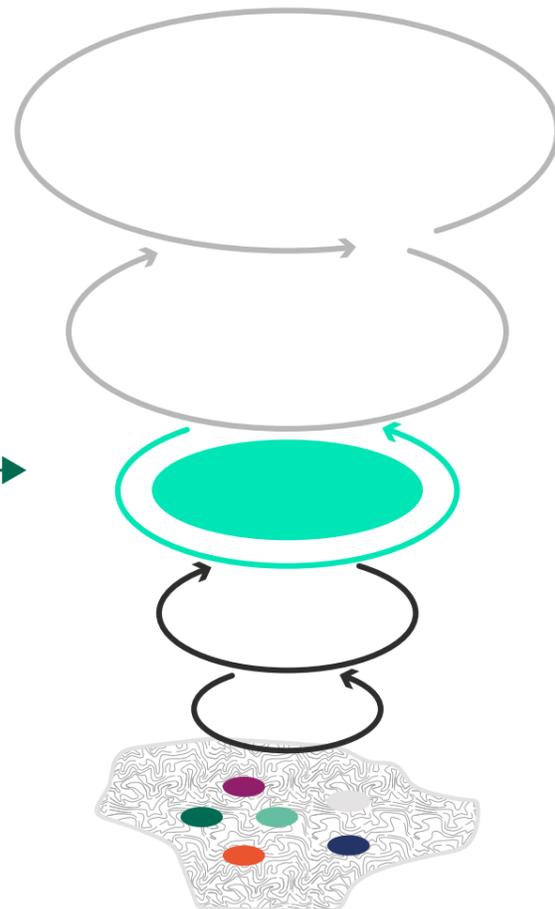
In terms of geographical reach, the geography of the district is expanding to include much of Belfast's city centre. This will include the Ulster University's new campus and a number of other major planned public and private investments. The district is fostering a 'whole place' approach that seeks to foster an innovation community that collaborates across industry, universities government, and directly with its citizens. A place where it is easy for businesses to form and scale; for investments to flourish; and for next generation urban services to be developed, trial and implemented in a post-Covid world.

STAGE 4

Foundation

| | |
|---|---|
| Identify a hub central location for collaboration and collision | ✓ |
| Build the community through joint collaboration initiatives, networking opportunities | ✓ |
| Invest in placemaking and make innovation visible | ✓ |
| Strengthen delivery tools and mature the governance model | ✓ |
| Attract a signature tenant, forum or event | ✓ |
| Ensure strong degree of coherence between site plans, masterplans and place vision | ✓ |

4. Foundation



1. Strengthen the governance and delivery model

- Devise and accrue new management tools, development competences, and revenue streams.
- Broaden and deepen working groups across organisations' shared functions, missions and inclusion.
- Create 'shared bank accounts' for larger programmes around incubation, re-skilling or public space.

2. Identify a hub centre of gravity for collaboration and flagship activities.

- Assemble open, compelling and non-intimidating spaces and aggregate activities around them.
- Find ways for hubs to provide an array of free/discount services (e.g. advice, networking, intel, operational) and financial support mechanisms.
- Align the provision of spaces very specifically to needs of the community.

3. Invest in the community and the crossovers

- Run/participate in programmes to grow pipeline of future businesses, skills and workforce.
- Engage and enlist purpose-driven corporates and businesses.
- Launch urban innovation competitions and shared data/knowledge platforms.

4. Create flagship visibility

- Improve walkability and porosity: facilitate movement within and beyond the place.
- Invest in flagship buildings, venues and experiences: make it look and feel different.
- Demonstrate what is possible and build confidence through iteration.

5. Attract a signature tenant, forum or event

- Vet inbound companies for their collaborative ethos and alignment with vision and specialisations.
- Leverage the brand of a major tenant to catalyse the place identity.
- Build the sampling and place affiliation through large scale repeat interaction.

6. Ensure strong degree of coherence between site plans, masterplans and place vision

- Simplify existing frameworks and achieve strategic alignment among decisive players.
- Connectivity and micro-mobility plan to ensure place is walkable, accessible and inviting from multiple entry points.
- Assemble strategic land where possible, to safeguard the place's innovation character.

Common issues to avoid at this stage

- X Over-reliance on a single catalyst and failure to sequence with infrastructure delivery.
- X Challenges acquiring a strategically decisive land share.
- X Focusing too much on property, at the expense of community building and organisation habits.
- X Lack of footfall, people, commercial users or interest.
- X Overclaims and generic boasts
- X Other competing locations emerge nearby in an uncoordinated way
- X Lack of stakeholder consensus to commit dedicated resources

Implications for place leaders

- Build awareness and continually facilitate collaboration between disjointed stakeholders (e.g. large and small businesses) and between the 'converted' and 'unconverted'.
- Create feedback channels to monitor what companies/tenants need and want.
- Effectively prioritise to deliver quality in the initial spaces.

Implications for major landowners and real estate developers

- Develop active spaces: ground floors, temporary events, and cultural projects.
- Prepare for continuous adaptation and servicing the innovation community.
- Ensure promotion of specific assets aligns with wider message

Implications for local government

- Support alternative activities and disruptive uses.
- More effective citizen communication and education about an innovation place's role.
- Integrate the place contribution among main city departments, including investment attraction and region narrative strategies

Implications for universities

- Co-design multi-disciplinary and cross-sector research opportunities.
- Aggregate demand from businesses for curriculum adaptation, bids applications, and other enablers.
- Create more operational independence in the management of place and business engagement

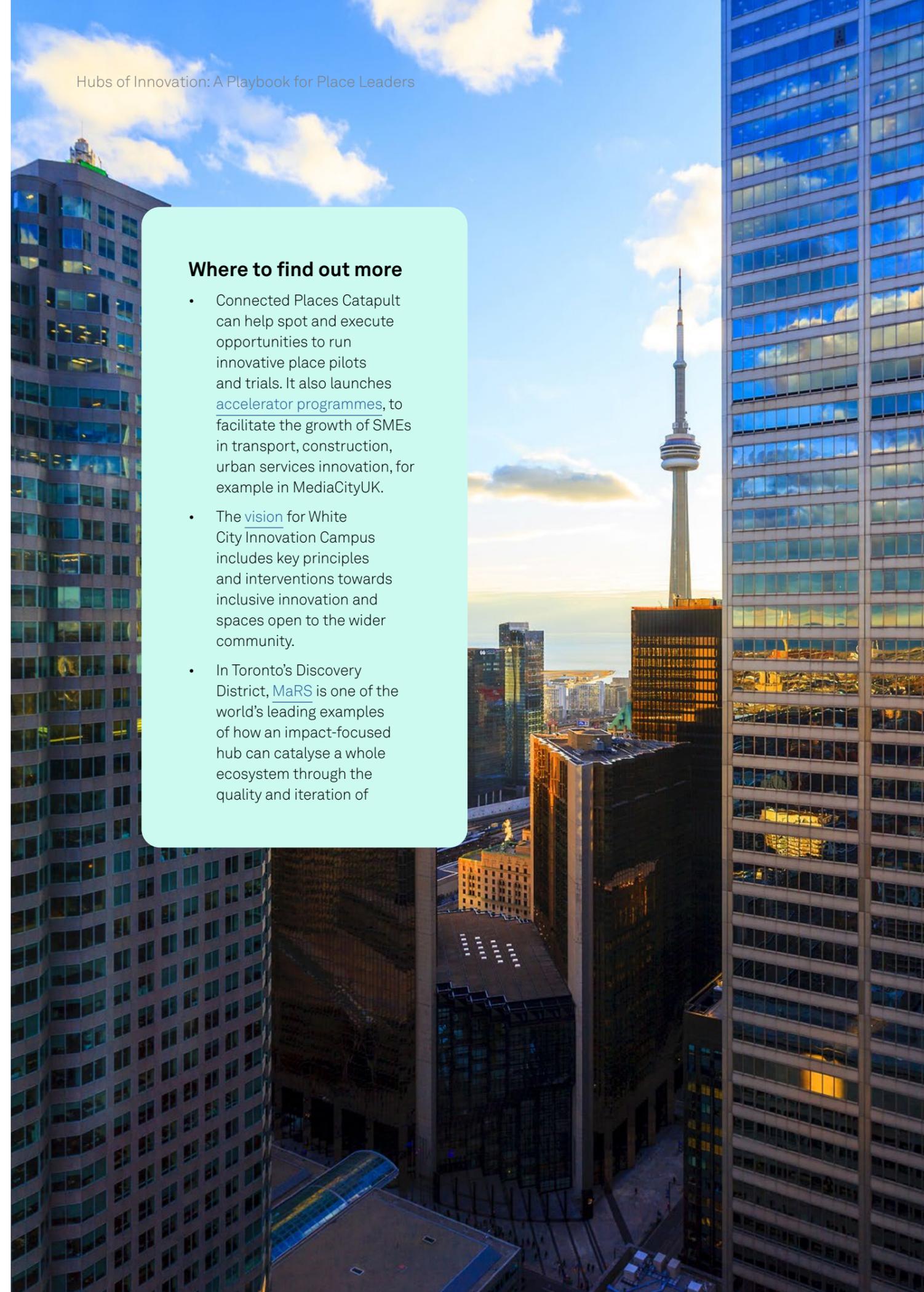
Implications for established businesses and SMEs

- Look to participate in innovation platforms, incubation and novel procurement initiatives.
- Offer and co-invest in relevant training opportunities to students, graduates and community.
- Foster positive disruption through design thinking sessions, hackathons, curated workshops, student competitions.



Where to find out more

- Connected Places Catapult can help spot and execute opportunities to run innovative place pilots and trials. It also launches [accelerator programmes](#), to facilitate the growth of SMEs in transport, construction, urban services innovation, for example in MediaCityUK.
- The [vision](#) for White City Innovation Campus includes key principles and interventions towards inclusive innovation and spaces open to the wider community.
- In Toronto's Discovery District, [MaRS](#) is one of the world's leading examples of how an impact-focused hub can catalyse a whole ecosystem through the quality and iteration of



Case study

Queen Elizabeth Olympic Park, London – Reinvesting in the relationships between Place, People and Purpose

9 years on from the Olympic and Paralympic Games, Queen Elizabeth Olympic Park has matured into a location that has translated its partnership momentum into a bold whole-place approach to civic innovation.

A 560-acre managed estate, the Park has gradually assembled a compelling set of knowledge anchors growth businesses, and innovators each energised by the sense of possibility that their fast-changing post-Olympic surroundings inspire. The Park's innovation path is shaped by the fact the area is home to large open expanses of reclaimed mixed public realm and parkland as well as a growing and diverse community and significant neighbouring deprivation. This context, combined with the advance in technologies, has led the Park to renew the place mission and amplify the 'London's Living Testbed' character of the district's identity, hosting experiments focused on mission-led innovation often derived from new products and designs created in and around the Park, all oriented towards enabling better urban futures. This has helped create new insights into how people, technology and regulation play off each other, and this action research approach provides welcome new channels for local participation in decision-making.

A central part of the Park's innovation offer has been Plexal, a centre whose innovation teams provide start-ups and scale-ups with proven programmes to connect to London's corporates, institutions, academia and investors. The next stage will see other emerging anchors within the Park such as UCL East, Loughborough in London, East Bank partners and Lendlease connect further with the likes of Here East and Plexal, as well as with the communities and authorities that surround them, in order to develop the Park's full innovation potential.

Another critical element of the Park's innovation matrix is the core and consistent focus on inclusive growth and inclusive innovation. Bespoke, early entry accelerator programmes such as Echo ++ and East London Inclusive Enterprise Zone have already started to broaden the field of who gets to innovate, and on what. While the expertise of the Park's thriving creative production, mobility, inclusive design, esports, and fashion clusters are being constructively enlisted to support local skills and actively create diverse talent pipelines to rethink how the place setting itself can be a driver of innovation and inclusion. East Works has been an umbrella for programmes delivering demand led specialist training and apprenticeships, now being convened within a single flagship space at the heart of the Park, the Good Growth Hub.

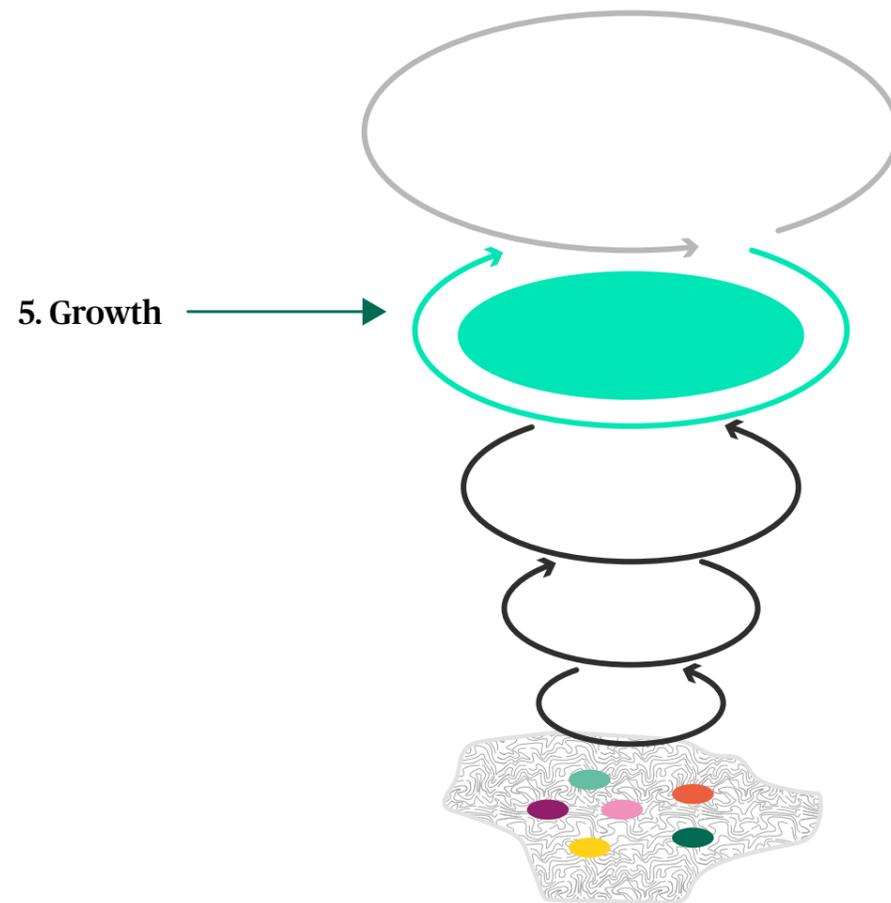
The more rounded approach to place delivery on such a large scale relies on continual orchestration of the messaging and the relationships. The Park's experience illustrates the civic and commercial value that starts to accrue in a place by fostering an environment where reciprocal habits of leadership, business behaviour, and civic interaction can take root and flourish.



STAGE 5

Growth

| | |
|--|---|
| Build the scale to compete | ✓ |
| Co-ordinate the ecosystem | ✓ |
| Improve the place finance and management tools | ✓ |
| Enrich the place story, celebration & communication. | ✓ |
| Monitor affordability and diversify the supply of space and housing. | ✓ |
| Test and display smart solutions for whole-place and whole-region challenges | ✓ |



1. Build the scale to compete

- Broaden the investor and user base.
- Realise the full sense of place and maximise the potential through mix of uses.
- Full data integration and/or shared approaches to digital adoption and energy

2. Improve the Place Finance and Management Tools

- Vehicles established to capture and reinvest the development and innovation value created.
- District management mechanisms that grow in roles, reach and revenues.
- Adapt the success indicators to reflect incremental roles in whole place change.

3. Co-ordinate the Eco-system

- Attract the players who are purpose-driven and keen to upgrade performance and customer experience.
- Support a wider variety of firms, establish the labs, settings, working groups and testbeds to work on specific joint projects.
- Expand the digital operating platforms for communication and knowledge bank sharing.

4. Enrich the Place Story, Celebration & Communication

- Use joint capital investments into place to develop a more profound place narrative.
- Invite and host the world through events to promote and celebrate the innovation culture
- Develop the profile and confident voice to Government.

5. Monitor affordability and diversify the supply of space and housing

- Work with partners to ensure effective range of rents and tenures.
- Continually audit availability, satisfaction and disincentives to desired mix of talent and businesses.

6. Test and display smart solutions for whole-place and whole-region challenges

- Build flagship visibility as a pioneer, including for net zero and connected buildings
- Encourage the community to set challenges, themes and inform open calls.
- Hold up tangible examples of innovation in practice.



Common issues to avoid at this stage

- X Government moves on and you become yesterday's agenda
- X Specialisations misalign with the original place brand.
- X Failure to develop sustainable income streams that do not distract from core innovation mission.
- X Lack of space or support for growing companies, and faults in igniting place vibrancy.
- X Large wins that inadvertently disrupt and soak up the talent pipeline.
- X Complications coordinating neighbouring governments due to variations in appetite.

Implications for place leaders

- Ensure the stakeholder commitments, the influence and profiling all match the pace of demand.
- Map the accumulated connections, successes, and trust-based networks.
- Consider where some assets or anchors could be expanded or relocated to optimise the innovation system.

Implications for major landowners and real estate developers

- Manage the tension between long-term vision versus short-term value.
- Intensify partnerships to develop with operators and enterprises.
- Attention to tenant mix, architectural diversity, workplace mix and changing talent needs.

Implications for local government

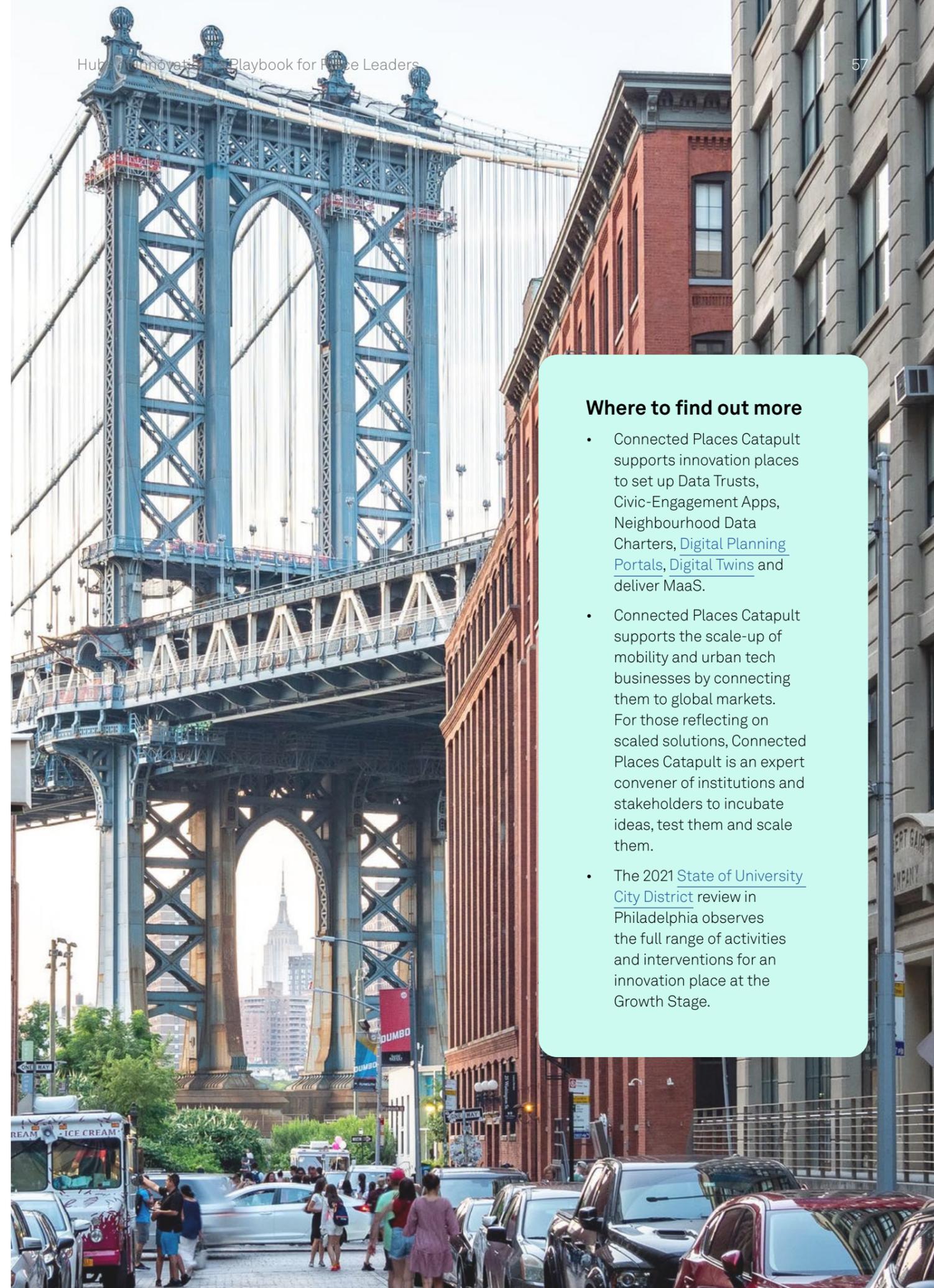
- Co-ordinate remaining public land uses to support place success, improve local environs, use local infrastructure and land as a platform for experimentation.
- Enable expansion of buildings and effective landowner negotiation. Consider a public anchor tenant.
- Support a wider leadership body to coordinate activities within a single innovation strategy.

Implications for universities

- Expand independent mechanisms to re-invest money, align interests and interact with nearby companies.
- Accelerate with the placemaking initiatives to create porosity and inclusivity.
- Establish employability focus to define pathways for internships and graduate employment.

Implications for established businesses and SMEs

- Co-invest substantial time commitment and resource commitments.
- Engage in larger experimentation, testing and pilots.
- Adopt continuous improvement methodologies among teams.



Where to find out more

- Connected Places Catapult supports innovation places to set up Data Trusts, Civic-Engagement Apps, Neighbourhood Data Charters, [Digital Planning Portals](#), [Digital Twins](#) and deliver MaaS.
- Connected Places Catapult supports the scale-up of mobility and urban tech businesses by connecting them to global markets. For those reflecting on scaled solutions, Connected Places Catapult is an expert convener of institutions and stakeholders to incubate ideas, test them and scale them.
- The 2021 [State of University City District](#) review in Philadelphia observes the full range of activities and interventions for an innovation place at the Growth Stage.

Case study

MediaCityUK, Manchester

MediaCityUK in the Salford Quays of Manchester is an example of an innovation place where the arrival of a major flagship tenant (BBC) coincided with wider place improvements and demand drivers to foster impressive levels of growth, clustering and specialisation.

A long-term process of City-led regeneration really took off when the BBC's 2011 move kickstarted the clustering of media and related companies around it. Growth gradually expanded to hundreds of businesses in production, marketing and advertising. This scaling established MediaCityUK as one of Europe's leading and most investor-friendly creative and media hubs.

Over time, MediaCityUK has begun strengthening its innovation fabric by expanding into more disruptive technologies. The launch of a Future for Health Challenge accelerator programme provided access for the cluster into health tech, and building off this success, a smart city testbed was launched in partnership with Connected Places Catapult, to leverage MediaCityUK as a living lab. Local innovation hub HOST now focuses its mission on expanding capabilities into data science, AI and immersive technologies, and lending its industry expertise to strengthen local talent and drive inclusive innovation in the area.

In its current growth cycle, during which it has benefited from Legal & General Capital as a 50% shareholder, MediaCityUK's strategic priorities are focusing on enriching the place narrative beyond the single-sector experience to one of 'live, work, play'. Greater mix of uses and variety of amenities are arriving as the district starts to host a full spectrum of services. A £1 billion effort to double the size of the district with work spaces and major residential complexes is underway. MediaCityUK is also leveraging its existing cultural and leisure infrastructure through global and community events.

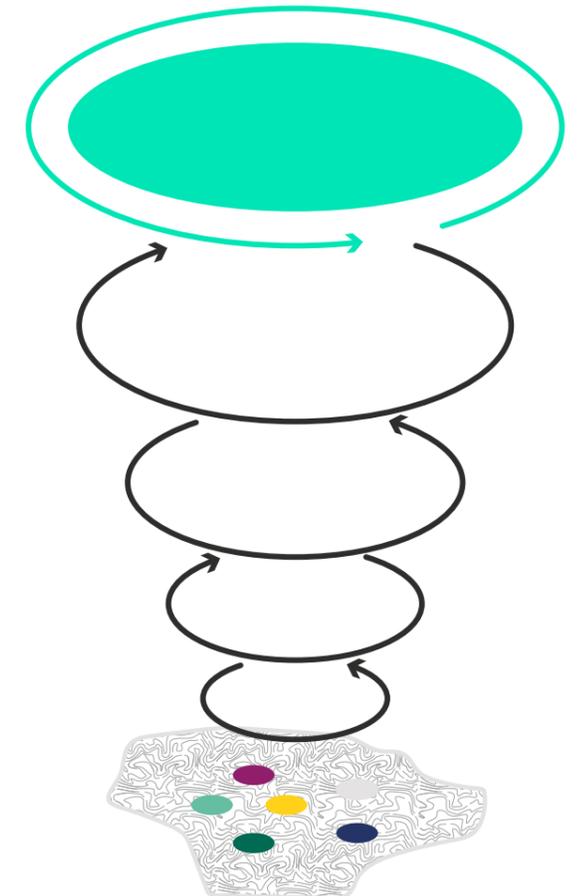


STAGE 6

Critical Mass

| | | |
|---|---|---|
| Full spectrum community management and services | ✓ | ✗ |
| Consolidate the governance for whole place delivery | ✓ | ✗ |
| Invest in amenities, social diversity and connectivity in the wider place catchment | ✓ | ✗ |
| Serve and support other locations | ✓ | ✗ |
| Manage the externalities that arise | ✓ | ✗ |
| Develop global reach and impact lens | ✓ | ✗ |

6. Critical mass



1. Full spectrum community management and services

- Services, welcomes, and interfaces that underpin stronger relationships with local community.
- Hands-on community management: building trust and promoting collaboration among a larger user base.
- Fully embed social responsibilities and social value of business throughout all codes of place practice.

2. Consolidate the governance for whole place delivery

- Develop platforms for administering larger funds.
- Become a provider of infrastructure for business growth.
- Renew the common purpose for partners to remain fluent in working together.

3. Invest in amenities, social diversity and connectivity in the wider place catchment

- Add variety and intensity in amenities to improve urban feel and establish place as source of pride, belonging and cohesion.
- Connectivity and integration with surrounding neighbourhoods; develop corridor effects.
- Bridging local skills gaps and improve employability of local workers.

4. Serve and support other locations

- Take the place innovation concept to other contexts in the region. Share experiences. Bridge the understanding gap about what it takes to work well in different locations.
- Maintain linkages with former tenants.
- Fit into broader strategies and permanently communicate the wider spillovers and benefits.

5. Manage the externalities and adapt what isn't quite working

- Improve the safety, micro-mobility and anti-congestion interventions.
- Prepare for industry disruption and convergence as new and old industries gravitate.
- Ongoing environs improvements to continually re-establish open community spaces.

6. Develop a global reach and global impact lens

- Convene, apply and disseminate solutions and discoveries for international problems.
- Spearhead partnerships and exchanges with other ecosystems, places and leadership teams internationally.
- Maintain early adopter culture in terms of connectivity, technology and public space.



Common issues to avoid at this stage

- X Stakeholder fatigue, complacency and status quo bias
- X Loss of control or stewardship as to which businesses you attract
- X Metrics of success become more narrowly conceived and scrutinised.
- X Intermediary organisations lose their sense of mission as complexity grows and as staffing changes.
- X Rapid re-purposing of innovation space to non-innovative uses.
- X Subject to penalties or relocations by governments eager to equalise outcomes.



Implications for place leaders

Re-galvanise key anchors and tenants around larger missions and opportunities. Engage strategically and sincerely to overcome expansion opposition. National and global influence. Diversify supply and delivery of services.



Implications for major landowners and real estate developers

Prioritise participation in whole place governance mechanisms. Facilitate wider access to amenities and services in buildings. Prepare for transition into a full service location.



Implications for local government

Create the flexibility and market choice that investors and growing firms might want, by promoting multiple locations. Larger mechanisms for inclusion. Facilitate more responsive educational programmes. Enabling planning framework to sustain full use mix and incentives for densification.



Implications for universities

Create new spaces and facilities outside the core location to bridge gap with local communities and contribute to city-region development. Actively reassess the commercialisation plan and technology transfer performance. Look for new ways to become a customer of local companies.

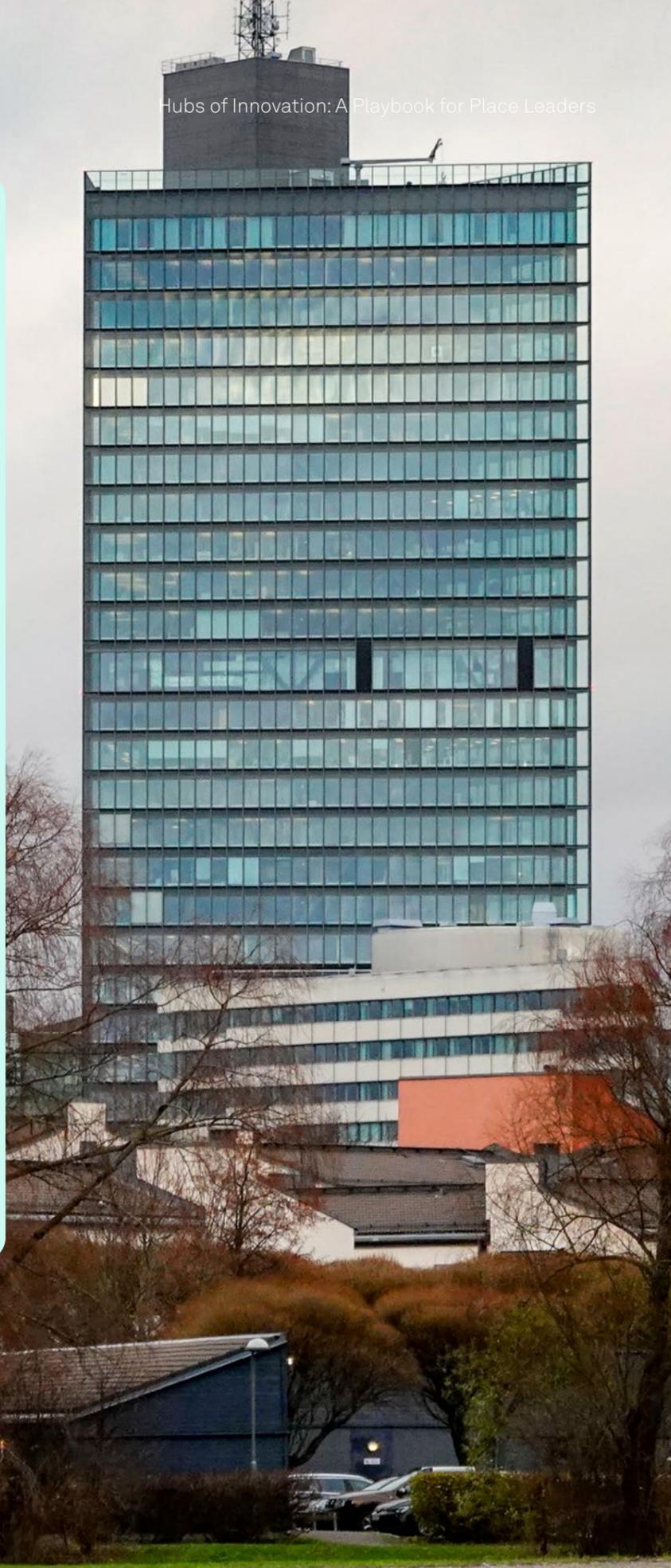


Implications for established businesses and SMEs

Take part in wider place missions on climate, inclusion and transparency. Expand operations in complementary locations. Leverage the global profile advantage for wider market visibility.

Where to find out more

- MaRS Discovery District in Toronto is one innovation place that has achieved critical mass. Its [impact report](#) after nearly 15 years details the breadth of services, ingredients and leadership sources that has made the model successful.
- Metropolitan Amsterdam is pursuing a co-ordinated approach, [Campus Amsterdam](#), where 37 of its innovation campuses, labs and districts come together to explore opportunities to share and innovate at scale to address larger challenges. See their 2020 [annual report](#).
- Connected Places Catapult provides mature places with connections and insights by 'matchmaking' them to similar, complementary locations globally in order to stimulate synergies and mutual learning. Connected Places Catapult also supports places as they build their international brands and helps them position and communicate their value to attract foreign direct investment.



International Case study

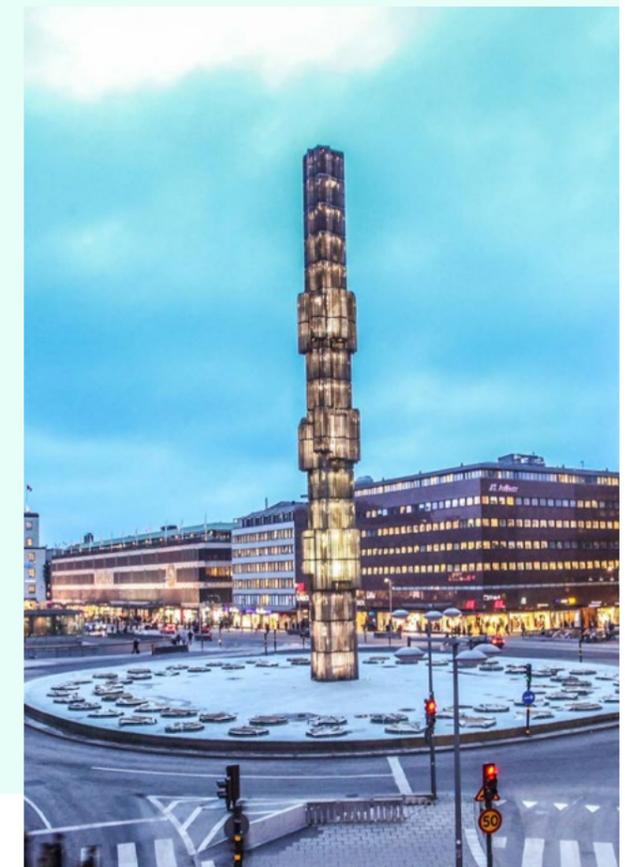
Kista Science City, Stockholm - Patiently building the capacity to become a global leader

Kista Science City in northern Stockholm is an example of a hub of tech innovation that has over time become globally competitive by continually re-defining its role and relevance, improving its co-ordination, and widening its services offer.

The creation in 1985 of a City-funded foundation comprising of larger firms (e.g. Ericsson and IBM), academia (Stockholm University) and the City of Stockholm helped to alter the fortunes of what was once an uninspired industrial suburb. The subsequent creation of two non-profit subsidiary companies was key. One - Kista Science City AB - is dedicated to the overall development of the place, running the place's business network SME community, and opening up knowledge pathways from large district tenants. The other - Sting - has matured into Sweden's most important accelerator, offering unique programmes curated for the specific growth stage of startups.

Kista Science City's collaborative governance structure has been key to a tight ecosystem even as it has grown to into a place with critical mass and home to tens of thousands of jobs. Ericsson's decision to sell its mobile manufacturing business in 2012, combined with the growing appeal of Stockholm city centre to startups and SMEs, initiated a new strategy cycle. The place managers led a process to identify the promise of becoming an urban test bed, where co-created urban technologies to tackle global urban growth challenges, smart city technology solutions, are tested in a real city environment.

At the same time Kista is recalibrating towards a more mixed-use, 24/7 environment, working more closely with real estate developers and the City of Stockholm to foster a more dynamic and high-amenity urban setting. The aim is to accommodate an additional 6,000 dwellings and strengthen the community and place belonging. Investment in expanded metro, train and inter-modal mobility hubs are also underway as Kista gradually evolves into a place with the depth and variety to become a 2nd CBD in the Stockholm region.



4

After Covid-19: Connecting up the UK's Innovation Places as they pursue their critical path



The UK's innovation places are critical to the national economic recovery and future. The pandemic's disruption to their business and collaboration model provides renewed impetus to equip these places with the tools and capacity and investment to succeed.

An essential part of the UK's national ambitions over the coming years for economic recovery, productivity growth, levelling up and net zero depends on the performance of the country's places of innovation. There is an opportunity for a vanguard of locations to become genuine global hubs of innovation, with the right set of well timed interventions. At the same time more

places in the UK need support and capacity on what it takes to drive high-value innovation in places where there is limited demand or where there are governance, technology or land constraints.

This handbook provides important common insights that are applicable across different places.

Many have the potential to become catalytic locations, and others can be more successful than they are now. Until now most have received limited systematic support in terms of planning, leadership, powers and competences. The next cycle for the UK's innovation places will be logically focused to:

- Deliver and evidence more local and sub regional impact in the form of economic and social value
- Measure and assess performance more comprehensively and beyond standard GDP focused measures of success
- Build living lab and testbed capability so that innovation they house also applies to their own place fabric and where relevant locally identified needs as well as grand societal challenges
- Engage skilfully with partners and with government to make the case for prioritisation and long term investment (in hard and soft levers)

The research for this paper also uncovered significant unrealised demand of UK's innovation places to tap into peer-to-peer knowledge and insight. In particular many locations now:

- Seek the opportunity to enter into dialogue with those who are further ahead, and are eager for the opportunity to learn.
- Wish to better anticipate what might be ahead and improve their services, support to businesses.
- Would like to understand how to tap into other partnerships and navigate the funding maze.
- Are enthusiastic to teach others, share lessons and mistakes.
- Have a desire to form agile networks with those in their 'peer group.'
- Urgently seek advice and solidarity on how to develop alternative revenue models and business models.

Expansion of peer-to-peer capability, above and beyond what already exists, is an important nextstep in the journey of the UK's innovation places. To this effect the Connected Places Catapult has committed to a new partnership with the UK Innovation Districts Group to extend the role the latter plays in engaging places of innovation. This partnership aims to foster a larger and more unified voice for innovation districts, into government, business and policy makers. It also looks to create new avenues for networking and shared knowledge platforms, and to deploy pilots and experiments that can have a demonstrator or accelerator effect. Central to the UK Innovation District Group's mission is a focus on understanding and stimulating more inclusive innovation.

As highlighted in this report, there is a need to use place-based investment in innovation systems and innovation thinking to help cultivate more inclusive growth that in turn is linked to improved productivity and shared prosperity. To help push this forward, the UK Innovation Districts Group will be launching an inclusive innovation research commission this year, the output of which should be incorporated into the emerging national innovation strategy and offered as a tool to innovation districts through the UKIDG platform in the same way that elements from this report will be.

In this next period as the meaning of 'build back better' takes form, the UK will benefit from a deeper and more widely shared understanding about why innovation places matter, what they can deliver and for whom, and what is required of those who lead them and enable them. The opportunity is there for innovation places to become a permanent agenda in government, business and universities, giving rise to a larger group of specialised practitioners and professionals. The locations furthest along the journey can be super-charged for maximum impact, while others can be better equipped to diagnose, benchmark, and develop the next steps of their path.





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Appendix – list of innovation places

We welcome any submissions of other locations to this evolving cohort.

UK Innovation Places

| | |
|---|--|
| Aberdeen Energy & Innovation Parks | Green Port Hull |
| Advanced Manufacturing Innovation District (Sheffield) | Harlow Science Park |
| Advanced Manufacturing Innovation District Scotland (Glasgow City Region) | Harwell Campus (Oxford) |
| Advanced Manufacturing Park (Rotherham) | Headington Health and Life Sciences District (Oxford) |
| Alderley Park (Cheshire) | Heriot-Watt University Research Park (Edinburgh) |
| Babraham Campus (Cambridge) | Hillhouse Technology Enterprise Zone (Thornton-Cleveleys) |
| Baltic Quarter (Gateshead) | i54 (West Midlands Combined Authority) |
| Barking Riverside (London) | Inverness Campus |
| Belfast Innovation District | Knowle West (Bristol) |
| Birchwood Park (Cheshire) | Lambeth Innovation District (London) |
| Birmingham Health Innovation Campus | Lancashire Advanced Manufacturing & Energy Cluster |
| Birmingham Knowledge Quarter | Leeds Innovation District |
| Birmingham Research Park | Liverpool Knowledge Quarter |
| Blackpool Airport Enterprise Zone | London Cancer Hub |
| Bristol and Bath Science Park | London Knowledge Quarter |
| Bristol Temple Quarter | London Stansted Cambridge Innovation Corridor |
| Brunel Science Park (London) | London West Innovation District |
| Cambridge Biomedical Campus | Loughborough University Science & Enterprise Park |
| Cambridge Cluster | M-Sparc (Anglesey) |
| Cambridge Science Park | Manchester Airport City |
| Cardiff Innovation Campus | Marine, Energy and Automotive Park (Liverpool City Region) |
| Charnwood Campus (Loughborough) | MediaCityUK (Manchester City Region) |
| Cheshire Science Corridor | Milton Park (Oxford) |
| Chesterford Research Park (Cambridge-Peterborough Combined Authority) | MIRA Technology Park (Warwickshire) |
| Creative Quarter Nottingham | Morlais (Anglesey) |
| Culham Science Centre (Oxford) | Newcastle Helix |
| Digbeth Social Enterprise Quarter (Birmingham) | Nexus (University of Leeds) |
| Discovery Park (Sandwich) | North East Technology Park (Sedgefield) |
| Dorset Innovation Park | North Kent Innovation Zone |
| Edinburgh Bioquarter | Norwich Research Park |
| Energy Innovation District (Cheshire) | Nottingham Biocity & Medicity |
| European Marine Science Park (Argyll & Bute) | Oceansgate (Plymouth) |
| Exeter Science Park | Ox-Cam Arc |
| EZ3 the London and South Innovation Valley | Oxford North |
| Foresterhill Health Campus (Aberdeen) | Oxford Road Corridor (Manchester) |
| Glasgow Biocity & Medicity | Oxford Science Park |
| Glasgow City Innovation District | Oxford University Begbroke Science Park |
| Glasgow Clyde Gateway | Oxford West End Innovation District |
| Glasgow Riverside Innovation District | Perth West |
| Global Innovation Corridor (Sheffield City Region) | |
| Granta Science Park (Cambridge) | |

UK Innovation Places

| | |
|--|--|
| Pioneer Park (Leicester) | UK Central Solihull Hub (West Midlands Combined Authority) |
| Queen Elizabeth Olympic Park (London) | University of Nottingham Innovation Park |
| Samlesbury Aerospace Enterprise Zone (Blackburn) | Warton Aviation Enterprise Zone (Preston) |
| Sci-Tech Daresbury Science Park (Warrington) | Warwick Innovation District (West Midlands Combined Authority) |
| Sheffield Business Park | Warwick Science Park (West Midlands Combined Authority) |
| Silicon Gorge (Western Gateway), Bristol & Bath | Wellcome Genome Campus (Cambridge-Peterborough Combined Authority) |
| Silverstone Park (Northamptonshire) | Wellesbourne Innovation Campus (West Midlands Combined Authority) |
| Skylon Park (Hereford) | West of Scotland Science Park (Glasgow City Region) |
| Southampton Science Park | Westcott Venture Park, Aylesbury |
| Space Park Leicester | White City Innovation Campus (London) |
| Stevenage BioScience Catalyst | Whitley South (West Midlands Combined Authority) |
| Stoneleigh Park (Warwickshire) | York Biotech Campus |
| Sunderland International Advanced Manufacturing Park | |
| Swansea Waterfront Innovation Quarter | |
| Tay Cities Biomedical Cluster (Dundee) | |
| Tech City/Shoreditch (London) | |
| Thornton Science Park (Chester) | |
| Tyseley Energy Park (Birmingham) | |





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