

White City: Innovation Districts

ULI UK Development Forum, 26 April 2018

At ULI's fourth UK Development Forum, over 40 leading developers, investors and advisers gathered at White City Place – the development by Stanhope, Mitsui Fudosan and AIMCo – to learn about the possibilities for innovation districts in the context of mixed-use regeneration in the UK.



Helios Statue, Television Centre

Introduction

"A lot of innovation happens not when you're doing the same thing with the same people every day but when you have the opportunity to rub shoulders with someone a bit different and think a bit differently," according to Professor David Gann, Vice President of at Imperial College London.

In his keynote presentation to the ULI Development Forum, Gann was talking specifically about the ideas behind the innovation ecosystem Imperial is creating at its White City campus. But much the same thinking applies to the overall regeneration of White City.

Though "mixed use" prefixes any large-scale development, the juxtaposition of the old BBC estate with Imperial's new campus, Berkeley St James's residential development and Westfield London has served up an extraordinary range of uses across this 100-acre site.

Sponsors of the event

MACFARLANES

STANHOPE

When announcing the sale of Television Centre in 2012, the BBC and Stanhope highlighted the opportunity to “build a new creative hub in west London”. Recently reinvented as apartments, Soho House club and working TV studios, Television Centre already looks like it will fulfil its promise. The complex is almost a 24-hour society in itself.

The same ideas hold true at White City Place, the old BBC Media Village and still the workplace for 3,000 BBC staff. But the “reimagined” buildings now have a much more diverse occupier base – including Youx Net-A-Porter, Oliver Bonas and Royal College of Art (RCA) – and are far more integrated to the wider White City community.

On the April afternoon of the Development Forum, students from the RCA and staff from Imperial were using the ground floor of Westworks in White City Place as an informal workplace – a small example of what the developers want to see as a matter of routine, according to Alistair Shaw, MD Television Centre, Stanhope.

“There is a vast amount of collaborative space. Places to gather,” he said. “That is a consistent theme rolled out by Stanhope/Mitsui Fudosan and Imperial College across our projects here, and I hope

“We are building a new creative hub in west London”



Alistair Shaw, MD Television Centre, Stanhope

that’s going to make a very different environment, where there is much more chance of creative collision happening between businesses than you perhaps see in traditional central London locations.”

What the speakers at the Development Forum suggested is that the innovation district, as with mixed-use regeneration generally, is here to stay in the UK. It may not be an exact science, as Imperial’s academics would understand it, but there are nonetheless some sound guiding principles.

Gann concluded with his top 10 conditions and resources required for successful innovation: ideas, talent and mobility, leadership, collaboration, patient capital, facilities, local partnerships, access to markets, international networks, and ability to scale and exit.

As AECOM’s Christopher Choa, who moderated the event, observed, Gann’s top 10 tips could also serve as a blueprint for successful urban development.



Television Centre Forecourt

White City – key statistics

Commercial hub with 2.5m sq ft of offices

A third of the 100-acre site is designated as public space

5,000 new homes planned (1,750 committed)

Westfield – Europe's largest shopping centre (2.6m sq ft total)

Imperial College – world class university

12 minutes to Bond Street: 3 Tube stations, 2 bus stations, Overground service



White City's placemaking programme

With most long-term developments the aim is to achieve something greater than the sum of its parts, and in that respect the £8bn regeneration of White City can claim a head start over many projects of similar scale.

Three key component parts of White City are the stuff of regeneration dreams – an iconic former BBC building, Europe's largest shopping centre and a world-leading university. And all of them can point to 2018 as a significant year in their own right.

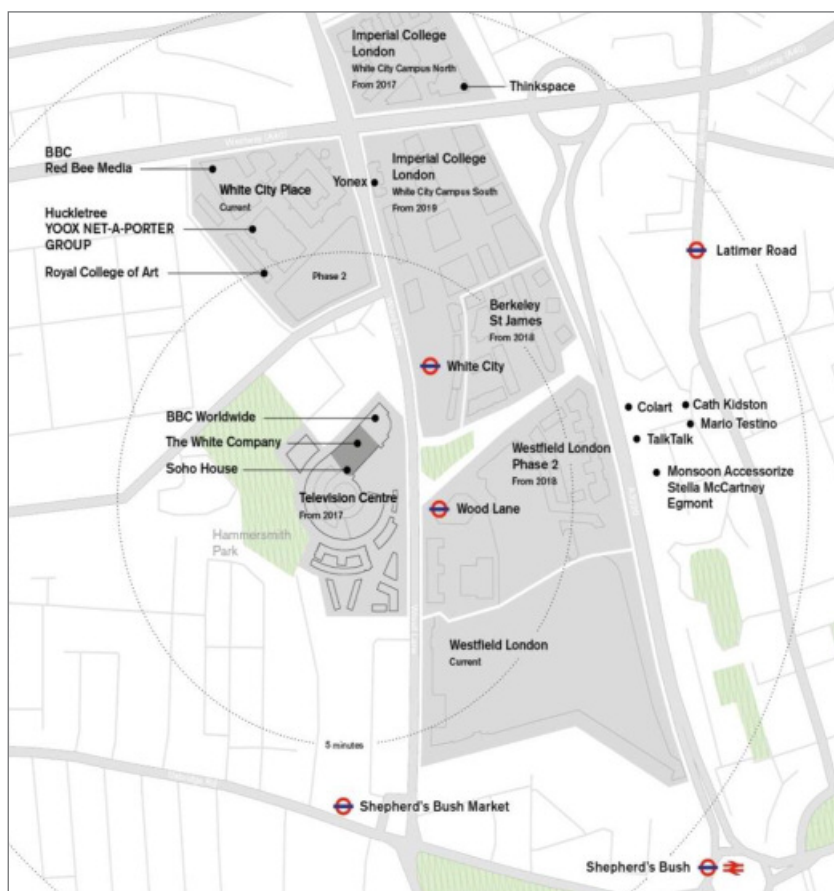
Stanhope, Mitsui Fudosan and AIMCo have completed their transformation of Television Centre from BBC studios and offices into a mixed-use complex including apartments, commercial space, a new Soho House club and hotel – and with the studios still in place.

John Lewis Partnership has opened its latest store in a 230,000 sq ft extension to Westfield, taking the total floor area to 2.6m sq ft and providing fresh trading impetus to a shopping centre that already attracts 40m visitors a year.

Later this year Imperial College London's White City campus will move up an operational gear with the opening of its Molecular Sciences Research Hub – effectively a relocation of the chemistry department from South Kensington that will bring 800 scientists, clinicians, engineers and business partners to the area.



Ryan Matenchuk, Stanhope,
Co-Chair UK Development Forum



At the same time, the most advanced part of the regeneration programme, White City Place, continues to enjoy a steady stream of office lettings, indicating a growing business momentum for this slice of west London despite the Brexit uncertainty afflicting the capital generally.

Another important test of sentiment will come in early 2019 when the first phase of Berkeley St James' planned 1,477 new homes will be ready for occupation on brownfield land just north of Westfield and opposite Television Centre.

With £4bn still to be deployed, much of White City remains to be developed and hurdles need to be overcome, largely around connectivity. Indeed, transport has been a blessing and a curse. It takes just 12 minutes by Tube to Bond Street and yet rail lines and cuttings have presented a physical challenge to development. The same is true of Wood Lane, which bisects the regeneration area and is pedestrian-unfriendly – still best

known as a car-bound link from Shepherd's Bush to the Westway.

But with the revamped Television Centre opening out to Wood Lane and construction of Berkeley St James' apartment buildings well under way, a new, expansive street scape is gradually taking shape and with it a sense of the placemaking ambitions of the landowners and their collective brief to improve connectivity.

Three key component parts of White City are the stuff of regeneration dreams – an iconic former BBC building, Europe's largest shopping centre and a world-leading university. And all of them can point to 2018 as a significant year in their own right.



Paul Eaton, Partner, Allies & Morrison

“It’s the sense that you can move through a new part of London, new sorts of spaces, moving from one different use to another but always supported by strong connections, and animated, active and clear public realm.”

Paul Eaton from Allies & Morrison, one of the leading architectural firms involved at White City, referred to all parties working very hard to make “seamless interfaces” between the boundaries. “It’s the sense that you can move through a new part of London, new sorts of spaces, moving from one different use to another but always supported by strong connections, and animated, active and clear public realm.”

Public realm accounts for as much as a third of the 100-acre regeneration area, and it has demanded a strong collaborative spirit from the landowners. “Because they are excellent in very different fields, whether it be academic, retail, residential, mixed-use space, that has made for a very good partnership,” said Alistair Shaw, MD Television Centre, Stanhope. It undoubtedly helps that just four groups control 100 acres – a rare concentration of ownership over such a large piece of London.

To make the public realm welcoming and effective, their shared vision has delivered a series of “outward looking” developments, starting with White City Place, the former

BBC Media Village on 17 acres in the north west of the site next to the Westway. Until the 1970s this was the location of the old Olympic Stadium and by 1990 it was the site of a new BBC headquarters – a building still standing but now completely reconfigured as the Westworks.

Though White City’s designation as one of London’s Opportunity Areas in 2013 marked the start of regeneration in earnest, the first sign of positive change dates from 2004 with the development of the Media Village when, Eaton said, Allies & Morrison as the architect here was “seeking to make a street that addressed the White City Estate”. It was reflecting a move towards “more public realm-led planning and development rather than building or land use planning and development”, which Stanhope, Mitsui Fudosan and AIMCo have picked up since their acquisition of this site in 2015. They have refurbished and “reimagined” the buildings, transformed the common areas and introduced extensive food and beverage outlets, drawing pedestrians from Wood Lane.

The same principles are evident at Television Centre. With its famous question mark design, it was, said Eaton, for decades the area’s “single most defining building” and yet such was the high level of BBC security it was also, effectively, a gated community.

Under Stanhope, Mitsui Fudosan and AIMCo, Television Centre remains a working studio complex, but their “reinvention” of the building to include apartments, restaurants and Soho House’s largest club necessitated a radically different approach to what went before. Today, the site as a whole – including the now residential circular courtyard with its famous Helios statue – is open to everyone. The landscaped forecourt already appears to be a popular gathering point.

Westfield, too, is a much more outward-looking development following the John Lewis extension, strengthening its ties to the regeneration area. With the growing number of residents and workers at White City, Westfield is expected to draw as many as 13m of its 40m visitors a year – partly via a new footbridge over the Central Line – into what was once regarded as the rear of the centre. The infrastructure here is a clever and elegant solution to the physical constraints of the site. It is also “probably the most important piece of connectivity”, Shaw said, “because it is the heart of White City”.

One of the big challenges, still, is the volume of traffic on Wood Lane but as a result of the development so far, this road is no longer just about the car. Eaton added: “Wood Lane is getting more and more important, gaining this status because buildings are fronting it positively for the first time.



“Because they are excellent in very different fields, whether it be academic, retail, residential, mixed-use space, that has made for a very good partnership”

White City – key dates

- 1908** This area of west London had an undistinguished history until 1908 when the Franco-British Exhibition and the Olympic Games were staged here. It was during this period the area became known as the Great White City due to the white marble cladding used on the exhibition pavilions.
- 1930s** First phase of White City housing estate is built, and the Central Line is extended here.
- 1944:** Publication of London Plan dictates a car-bound future for White City.
- 1960:** Opening of BBC Television Centre, the world's first purpose-built TV studios.
- 2008:** Opening of Westfield London shopping centre.
- 2009:** Imperial College London buys its first site; further purchases take its landholding to 22.75 acres by 2013.
- 2012:** BBC sells Television Centre to Stanhope, Mitsui Fudosan and AIMCo for £200m.
- 2018:** Grand opening of Television Centre and Phase 2 Westfield

Imperial's innovation and entrepreneurship



Professor David Gann, Vice President of Innovation, Imperial College

“Location, in addition to connection, is as important as ever for business competitiveness.”

It was 2009 when Imperial College London acquired its first plot of land immediately north of the Westway in what would become its new White City campus – long before the idea of innovation districts started to resonate in UK real estate.

By November 2016, the concept had evolved sufficiently in the UK for Stanhope and Imperial to publish a White Paper on the future of innovation ecosystems, and how tech and creative people want to work in clusters.

“Location, in addition to connection, is as important as ever for business competitiveness,” Imperial College’s Vice President of Innovation, Professor David Gann, said in the White Paper. “In the new era of innovation, it is the location in and connectedness to cluster ecosystems of science, creative industries and technology that matter most.”

There has been much interest in the economic potential of innovation ecosystems

– or innovation districts or clusters – ever since, and in a UK context Imperial can claim to be leading the field with its investment in White City.

Even now, Gann told the delegates at the Development Forum, there are no definitive answers as to the best conditions for fostering innovation although “a language is evolving” and there is a “fertile discussion” between academia, government, industry and entrepreneurs.

According to Gann, “innovation ecosystem” best describes Imperial’s “agglomeration” of research-led start-ups and corporate partners lined up for White City. “We’re in the business of deep science where markets have not yet formed the products or the outcomes, so it’s very hard to call it a cluster if you can’t see customers and market places,” he said. “So, we’re at that exploratory, leading edge of where science is taking us.”

To facilitate that scientific journey, the range of facilities either built or planned include: advanced hack space for “turning ideas into reality”, invention rooms, incubators combining offices and lab space. Much of it echoes the co-working trend evident across real estate.

Imperial’s first “co-location” building – the 187,000 sq ft Translation & Innovation Hub (I-Hub) – provides a home for start-ups to work alongside academics. There are progressively larger spaces throughout the building to accommodate business growth.

A Molecular Sciences Research Hub will open this year, followed by a Biomedical Engineering Research Hub. A second phase of development, south of the Westway, will see a Scale Space joint venture with Blenheim Chalcot for those firms that have reached the next stage of business expansion. Further land is available at White City as and when required by this innovation ecosystem.

The “location and connectedness” narrative behind the new campus needs to be seen in a west London context, too, not least because nearby Hammersmith Hospital is an important and established partner in Imperial’s medical research. But as the Development Forum discussed, in the very long term it is conceivable that the scaling up of Imperial-led ideas could result in companies relocating to Park Royal, London’s largest business park.



Imperial College, White City Campus

So far, Imperial has demonstrated pragmatism and an entrepreneurial eye for opportunity in its own right. By 2009, there was a lack of space and facilities on the main South Kensington campus for the research and development the university undertakes in collaboration with its 500 core industrial partners. Imperial was well capitalised when land values were low and there were few other prospective buyers in the market for land at White City in the aftermath of the financial crisis.

Fortune favours the brave and in Imperial's case that came through later in the form of a £40m gift from businessman Michael Uren to help pay for the Biomedical Engineering facility. As Gann pointed out, all the space at the White City campus is expensive to develop, and critical mass is a prerequisite. "We need access to markets, and ideas to flow out quickly, international networks, and the ability to scale and exit," he said. "We couldn't scale before and that is where Scale Space is a new idea for us."

Student accommodation and a residential tower are also helping pay for the new campus but that is just the start. The innovation ecosystem, as described by Gann, requires Imperial to act as mentor to the businesses within. It also requires patient venture capital – it may be 15 years or so before the start-ups in the I-Hub show a return. "A lot of what we're doing is not just about property," he said. "It's about what services can we deliver to the participants that will make this work?"

As would be expected from an academic institution, extensive research has helped define Imperial's start-up, scale-up ecosystem, and lessons have been learned from numerous examples of successful innovation districts in the US. But Gann also stressed the importance of the random "connections and collisions" that occur when various organisations end up in the same setting. "Why do organisations want to be in proximity with each other? We are thinking about the casual connections that you get across the street and in cafes. Could

"Why do organisations want to be in proximity with each other? We are thinking about the casual connections that you get across the street and in cafes. Could you do new things if you co-locate? There is something about community and shared goals."



you do new things if you co-locate? There is something about community and shared goals."

These "connections and collisions" extend to the wider community, and Imperial's place in White City. According to Gann, the environment Imperial is striving to create on its campus has been made "a lot easier" by having partners with similar values. "We can then share some of these values," he explained, "because some of the clients we might to bring into the area may not fit with us, but they may fit with Stanhope, and vice versa."

As Gann conceded, in the early stages, Imperial had not fully thought through its strategy in the context of White City's overall regeneration. The campus was originally called "Imperial West", which Gann said did not signify much to the university's many overseas partners. It is now known as Imperial's White City campus – a clear acknowledgement of the value of placemaking.

"I think this is the most exciting development zone," Gann concluded. "It would be whether we were here or not. It's just that we are going to drive part of it from deep science."



About ULI

The Urban Land Institute is a non-profit education and research institute supported by its members. Its mission is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Established in 1936, the institute has more than 40,000 members worldwide representing all aspects of land use and development disciplines.

ULI has been active in Europe since the early 1990s and today has 3,000 members across 27 different countries. The UK National Council is the largest in Europe with over 1,100 members and has a dynamic programme of events and thought leadership. For more information, please visit uk.uli.org

Join us today

Our members are business leaders, public officials and community builders – the people who develop and redevelop neighbourhoods, business districts and communities across Europe, the US and around the world. Our diverse, yet common purpose provides rich opportunities to engage with people from different disciplines and to deepen existing relationships.

Members encompass the spectrum of experience from students through to revered senior industry figures. They engage at different levels – globally, regionally and locally. Achieving the ULI mission is made all the more possible through their contributions and experience. It is through member involvement and information resources that ULI has been able to set the standards of excellence in development practice.

To learn more about ULI membership, please visit europe.uli.org/join

**Copyright ©2018
by the Urban Land Institute.**

ULI Europe, all rights reserved. No part of this report may be reproduced in any form or by any means, electronic or mechanical, including photocopying or recording, or by any information storage and retrieval system, without written permission of the publisher. ULI has sought copyright permission for all images and tables.

Author: Doug Morrison

Development Forum - Companies Represented:

Allies and Morrison; Assael Architecture
BNP Paribas Real Estate Advisory UK
Capital & Counties; Cushman & Wakefield
Department for International Trade; First Base
Gensler; Greater London Authority
Grosvenor; Guy's and St Thomas' Charity
Hawkins Brown Architects ; Helical Bar
Homes and Communities Agency
Imperial College London
International Quarter London; JACOBS
Knight Dragon Developments; KPMG
Lendlease; Linkcity; Macfarlanes; MedCity
Native Land; Old Oak Common & Park Royal
Development Corporation; Participatory City;
Quintain; Real Estate Business Consultancy
Services Ltd; Shepherd & Wedderburn;
Stanhope; Westfield.



**Urban Land
Institute**

Europe

50 Liverpool Street,
London EC2M 7PY
Telephone: +44 (0)20 7487 9570
Email: ulieurope@uli.org
Website: europe.uli.org