East Midlands
Life Sciences Cluster

Position Paper 2026

Discovery to manufacture.
One connected region.

November 2026

About the Author

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East Midlands
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Discovery to manufacture.
One connected region.

The East Midlands Life Sciences sector can help scale UK science and discoveries here. It can help manufacture more of what UK discovers.

East Midlands has a full and well-connected Discovery to Manufacture Arc, spanning discovery science, clinical research, advanced manufacturing, resilient supply and NHS adoption - already built, and ready to do more for the country.

DISCOVER | DEVELOP | VALIDATE | SCALE | MANUFACTURE | MOVE & SUPPLY | ADOPT

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The proposition

The UK is good at discovering new medicines, but too much of the manufacturing and commercial value goes elsewhere. Patients here can still wait for their treatments developed through our research, while other countries gain the new treatments, investment and jobs that follow. We watch manufacturing go to locations where energy costs, access to skills and planning are easier.

We believe we can change that. Alongside excellent science, we need places where businesses can develop ideas, manufacture products and get treatments to patients. That means having the right people and facilities, with supply chains we can rely on.

The East Midlands has the strengths and established networks that a successful cluster needs. Our ambition is to bring them together.

511	£5.8bn	22,413	147
Life sciences companies (East Midlands, 2023/24)	Annual life sciences turnover	Direct life sciences jobs	Biopharmaceutical companies

Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2023 to 2024 (published October 2025), East Midlands ITL1 statistical region.[1]

The national challenge

Life sciences is one of the UK's greatest economic strengths, but we are finding it harder to turn our research into products made here and treatments available to patients. Of the UK-developed medicines approved between 2020 and 2023, only 65% were available to patients in England. Recruitment to commercial clinical trials fell by a quarter between 2022/23 and 2024/25, while around £2 billion of planned pharmaceutical investment has been paused or cancelled.

Why the East Midlands

The region is home to 511 life sciences companies, generating £5.8 billion in turnover and employing 22,413 people. It also brings together every stage from discovery to manufacture and patient use within a connected area where people live and work. Alongside discovery science and two Biomedical Research Centres, we have one of the UK's highest concentrations of contract research and manufacturing sites, GMP medicines and MedTech production, and the country's only inland Freeport. The new National Rehabilitation Centre, NIHR HealthTech Research Centres and an NHS innovation adoption body with a national pipeline add to these strengths.

What we are asking for

Five practical interventions that use existing government policies and sit within departments' current responsibilities. The asks build on the cluster we already have and require no new institution. Together, they would help us make better use of existing facilities and expertise to increase domestic production and exports, reduce reliance on overseas supplies, deliver more clinical trials and bring new treatments and technologies into healthcare.

What the region will contribute

Industry can lead the coordination and provide a single point of contact for Government and investors. We will bring together the evidence and map our regional assets, develop an investment prospectus and work with employers on the skills they need. We will report publicly on progress each year.

Executive summary

The summary introduces the East Midlands, its contribution to UK life sciences, the support we are asking for and what the region is prepared to deliver in return.

The problem Government is trying to solve

Life sciences is one of the UK's largest industrial sectors. The latest published figures show £146.9 billion in turnover, 359,600 employees and 7,320 companies. Biopharmaceuticals account for £98.9 billion of that turnover.[1] Our research base is strong, but we struggle to turn discoveries into products that are actually made here, skilled jobs and treatments patients can access.

The scale of the challenge is significant. Only 65% of medicines authorised between 2020 and 2023 were available to patients in England, and 57% in Scotland.[6] Recruitment to commercial clinical trials fell by 25% between 2022/23 and 2024/25. Industry studies accounted for just 3.4% of NHS trial participants, with participation at its lowest level since 2017/18.[5] Around £2 billion of planned pharmaceutical investment in the UK has been paused or cancelled, including a £1 billion research centre in London and a £200 million development in Cambridge.[4]

These difficulties are familiar. Successive government strategies have recognised that the UK contributes a large share of global research but retains less of the commercial value that follows than competing countries. Access to investment is also uneven. Universities across the wider Midlands have historically received around 1% of UK venture capital investment in university spinouts.[11] [12] The Life Sciences Sector Plan, the Modern Industrial Strategy and the UKRI Strategy 2026–2031 all recognise the need to connect research with investment, manufacturing and the NHS.[7] [9] We all want more of the medicines discovered in the UK to be developed and manufactured here. It is not only about the jobs this would create but new treatments available to NHS patients

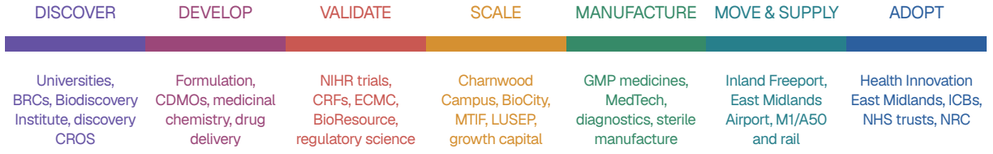
What the East Midlands already is

The East Midlands has an established life sciences sector, built over six decades. Its companies, campuses, universities and NHS organisations already work together, with relationships that extend across the region.

We call this the Discovery to Manufacture Arc, or D2M Arc. It describes the expertise and facilities across Leicester, Leicestershire and Rutland; Derby and Derbyshire; and Nottingham and Nottinghamshire. Businesses and researchers work across these boundaries, even where policy and funding arrangements do not. **Through this campaign, we are bringing together the evidence of what is here and giving the sector a shared regional voice.**

There is an opportunity to build on these relationships to attract investment and create more skilled jobs. Closer cooperation on research, manufacturing, skills and healthcare would also help the region contribute more to national resilience and lower dependence on imports. This work could show how devolution and regional growth policies can support a sector that spans several local authority areas.

The commercialisation pathway has seven main capabilities, set out below. Few places outside the Golden Triangle have all seven so close together, alongside established manufacturing sites.



The seven capabilities of the Discovery to Manufacture Arc within the East Midlands.

The scale of the sector

Two sets of figures below help explain the sector's size and strengths. The wider life sciences figures show how much the industry contributes to the region.

The biopharmaceutical figures give a clearer picture of our expertise in discovering, developing and manufacturing medicines. Both matter.

Wider East Midlands Life Sciences

511	22,413	£5.8bn
Life sciences companies	Direct life sciences jobs (8,007 biopharmaceutical, 14,406 medical technology)	Annual turnover

East Midlands Biopharmaceuticals

147	8,007	£2.85bn
Biopharmaceutical companies	Biopharmaceutical jobs	Biopharmaceutical turnover

Both sets are Office for Life Sciences 2023/24 figures for the East Midlands ITL1 statistical region, which covers Derbyshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire and Rutland. That is broader than the connected cluster geography described in this paper. Equivalent figures for the narrower geography are not currently published.[1]

What the region contributes to the national pathway

Discovery and translation. The region has six universities: Loughborough, Leicester, De Montfort, Nottingham Trent, Nottingham and Derby. Two NIHR Biomedical Research Centres, in Leicester and Nottingham, work alongside specialist facilities such as the Biodiscovery Institute, the Institute for Precision Health and the Sir Peter Mansfield Imaging Centre. An established network of contract research organisations also supports medicines discovery.

Development and contract capability. The East Midlands has one of the UK's highest concentrations of contract research and manufacturing sites. OLS recorded 50 sites in 2021/22, 39% more than the West Midlands and **around 69% more per head of population**.[3]

Clinical validation. In 2024/25, the NIHR East Midlands portfolio supported 2,004 studies and recorded 96,778 participant enrolments. This represented 9.2% of all NIHR-supported enrolments in England, placing the East Midlands fourth among England's twelve Research Delivery Networks.[14]

Scale-up space. Businesses have access to laboratories, specialist facilities and room to grow at Charnwood Campus, BioCity Nottingham, MediCity, the Medical Technologies Innovation Facility in Nottingham, UNIP, Nottingham Science Park and Loughborough University Science and Enterprise Park. Charnwood Campus, the UK's first Life Sciences Opportunity Zone, occupies the 70-acre former AstraZeneca R&D site.[21]

Manufacture. Companies here manufacture GMP medicines, inhaled and transdermal treatments, sterile products and specials, as well as diagnostics, single-use medical devices and radiopharmaceuticals. Manufacturing accounted for 14.8% of the region's GDP in 2023, compared with 9.1% across the UK. Only Wales had a higher share.[17] The region also demonstrated its ability to respond in a crisis when Charnwood Campus hosted one of the national COVID-19 Lighthouse Labs in 2020.[37]

Move and supply. The East Midlands is home to the UK's only inland Freeport, built around East Midlands Airport, the country's largest dedicated air cargo operation. Connections to the M1, A50 and rail network support the movement of goods across the UK and overseas.[19]

Adopt. Health Innovation East Midlands helps businesses introduce innovations into NHS care. In 2025/26, it supported 558 companies and reported benefits for 119,335 patients. Its work saved 28,969 clinical appointments, freed up 72,041 hours of NHS clinical time and supported £46.8 million of inward investment. It draws on a national pipeline of more than 1,600 innovations.

The region also has three research-active acute trusts. These include Nottingham University Hospitals NHS Trust, which operates the National Rehabilitation Centre on the Stanford Hall Rehabilitation Estate. The.[20 22]



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The regional asset base at a glance

Research and discovery

- Six universities with internationally recognised expertise in pharmaceutical innovation, precision medicine, genomics, medical imaging, AI, health data science, biological sciences, engineering, bioengineering and medical technologies.
- Two NIHR Biomedical Research Centres, in Leicester and Nottingham, working alongside the Leicester and Nottingham Clinical Trials Units. Together, they support experimental medicine and help researchers design and deliver clinical trials. Leicester's expertise includes cardiovascular, respiratory and metabolic disease. Nottingham's strengths include hearing, gastrointestinal and liver disorders, musculoskeletal conditions, mental health and respiratory disease, supported by precision imaging, magnetic resonance imaging and health informatics.
- The University of Leicester's Institute for Precision Health brings together genomics, AI, health data science and clinical research. It works with the NHS to develop more personalised diagnostics and treatments and improve how health data informs care.
- The University of Nottingham's Biodiscovery Institute brings together around 1,000 researchers, clinicians, support staff and collaborators across approximately 90 independent research groups. It has secured more than £400 million in research funding since 2014.[23]
- The University of Derby's Bioscience Superlab and Facility for Omics Research in Metabolism add expertise and facilities for molecular bioscience and omics research, with opportunities for businesses to work with university researchers.
- Midlands Innovation brings together eight research-intensive universities. Across the wider Midlands, around twenty universities secured £6 billion in research funding between 2019 and 2024 and generated more than 350 spinouts.[12]

Development, scale-up and manufacture

- **Charnwood Campus Science, Innovation and Technology Park**, the UK's first Life Sciences Opportunity Zone, occupies the 70-acre former AstraZeneca R&D site. It retains more than £400 million of pharmaceutical research, development and GMP manufacturing infrastructure, with over 800 scientists working on site.[21]
- **Major international manufacturers and life sciences businesses already operate here at scale.** They include Almac Pharma Services, Kindeva Drug Delivery, Solventum (formerly 3M Health Care), Reckitt, Quotient Sciences, Sartorius Albumedix, Thermo Fisher Scientific, STERIS, Boots, Pharmaron, Zydus Pharmaceuticals UK, Upperton Pharma Solutions, Pennine Healthcare and Codis (formerly Catalent Nottingham).
- **University spinouts are turning research into new businesses in healthcare and advanced manufacturing.** The University of Nottingham's portfolio includes Locate Bio, BlueSkeye AI, Cerca Magnetics, NuVision Biotherapies, Neupulse and PeptiMatrix, alongside manufacturing businesses such as Added Scientific and Promethean Particles.
- **Drug discovery and development have recovered as the sector has changed.** Following the contraction of Boots' pharmaceutical research and the closure of AstraZeneca Charnwood, activity spread across a wider network of contract research and manufacturing organisations, specialist manufacturers and spinouts. By 2021/22, biopharmaceutical employment had risen above its 2010/11 level.[3]
- **Manufacturing is a substantial part of the regional economy.** It accounted for 14.8% of East Midlands GDP in 2023, compared with a UK average of 9.1%. Only Wales had a higher share.[17]
- **The £160 million East Midlands Investment Zone** is a ten-year programme supporting advanced manufacturing and clean energy. It is expected to create around 4,200 jobs and attract at least £383 million in private investment. Its work on digital technology and industrial production is relevant to pharmaceutical manufacturing and drug delivery, where automation and precision engineering can help businesses produce complex medicines more efficiently.[17] [18]

Clinical research, adoption and place

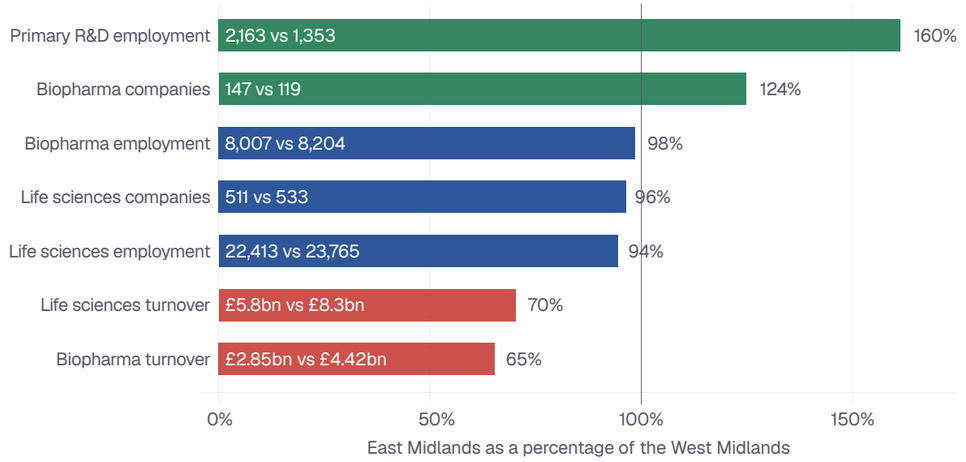
- **The UK's only National Rehabilitation Centre**, at Stanford Hall in Nottinghamshire, admitted its first patient in September 2026. It brings clinical care, research and innovation together, supporting work on rehabilitation, long-term conditions and medical technologies.[22]
- **Health Innovation East Midlands** helps innovators, NHS organisations and industry work together to introduce innovations into NHS care. In 2025/26, it supported 558 companies and reported benefits for 119,335 patients. Its work saved 28,969 clinical appointments, freed up 72,041 hours of NHS clinical time and supported £46.8 million of inward investment.[20]
- **The region brings the full life sciences pathway within easy reach**. Discovery science, translational research and clinical trials sit close to pharmaceutical manufacturing, MedTech, rehabilitation, logistics and facilities that help businesses scale up. This makes the East Midlands one of the UK's most concentrated areas of life sciences activity.
- **The UK's only inland Freeport** is built around East Midlands Airport, the country's largest dedicated air cargo operation, with connections to the M1, A50 and rail network. It is projected to add around £9 billion in GVA and create 28,000 direct and indirect jobs.[19]
- **Operating and living costs are lower than in the Greater South-East**, with comparable transport connections across the UK and internationally.

The honest position

The East Midlands is not the UK's largest life sciences cluster. Current Office for Life Sciences figures place it sixth among the twelve UK nations and English regions for biopharmaceutical companies, employment and turnover. Compared with the West Midlands, it has 96% as many life sciences companies, 94% as many jobs and 24% more biopharmaceutical companies, but only 70% of the turnover.[1]

That turnover gap shows something important. The region has rebuilt since losing two major corporate anchors, and much of its expertise now sits in a number of small specialist businesses rather than within a few large companies. These businesses are productive, serve international clients and export their products and services. They appear to need better access to scale-up capital, manufacturing investment and NHS customers so that more of the value they create is retained in the UK.

The region also needs an independent economic assessment of the cluster, covering the established businesses and supply chains that work across administrative boundaries. Other clusters already have this evidence to build on. Without it, we cannot give Government a robust estimate of the East Midlands' GVA contribution, supply-chain multiplier or the additional jobs supported through spending in the wider economy. Co-funding this assessment is therefore one of our five asks.



East Midlands life sciences and biopharmaceutical indicators expressed as a percentage of the West Midlands, 2023/24.

Source: Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2023 to 2024, regional data tables.[1] Geography: ITL1 statistical regions. Figures above 100% mean the East Midlands exceeds the West Midlands on that measure.

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What is being asked, and of whom

For each of our five asks, we set out who in Government we need to work with, what it could achieve for the UK and how we can deliver it in the region using existing programmes. They are summarised below and developed in Section 4.

What the sector commits in return

During the first twelve months, industry will lead work that is largely within the campaign's control. We will launch the cluster and bring partners together, publish a shared evidence base and asset map, and produce an investment prospectus. We will also map the finance and scale-up support available across the region, explain the sector's career opportunities and skills needs, and report publicly on progress.

A second phase, subject to partner agreement and funding, would add a White Paper, the independent economic assessment, a manufacturing and supply-chain resilience roadmap, and an offer to help international businesses establish themselves here. Section 5 sets out both phases.

What could follow in 2027 and 2028. Subject to partner commitment and resources, we would work towards pilots for the innovation adoption pathway and employer-led technician training. We would also begin designing the supply-chain and sovereign capability map and the scale-up diagnostic, and commission the independent economic assessment.

EMLSC and its partners are already helping shape this work. Decisions on larger programmes, such as a resilience pathfinder, an adoption pilot or a Scale & Stay pilot, will follow once the evidence is available.

The decision for government

The region already has the businesses, skilled people and facilities and much of the investment has been made. Government now has an opportunity to support them through national programmes, while these strengths remain here.

The five asks at a glance

Our five asks build on government policies and funding already in place. They sit within departments' existing responsibilities, so there is no need to set up a new institution.

Ask	What is being asked for	First commitment sought	Lead department or body
01	Support for manufacturing, industrialisation and the UK's ability to produce essential medicines and technologies	Discuss regional sites and potential projects for the Life Sciences Innovative Manufacturing Fund. Help agree the scope of work to map supply chains, critical medicines and sovereign capability.	Office for Life Sciences
02	An independent economic assessment of the cluster	Agree in principle to fund the assessment jointly with regional partners.	Department for Business, Innovation, Science and Trade (BIST)
03	An East Midlands Innovation Adoption Demonstrator	Identify contacts within DHSC and the NHS and agree to develop the demonstrator together.	Department of Health and Social Care
04	Recognition of EMLSC as the partnership bringing the region's life sciences sector together	Appoint an OLS relationship lead and agree a formal review every six months.	Office for Life Sciences
05	A life sciences skills programme shaped by employers	Use the regional exercise to identify employers' skills needs as a pilot for the Life Sciences Jobs Plan.	Department for Work and Pensions, Skills England

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ASK 01
Manufacturing, industrialisation and sovereign capability

Make the East Midlands a priority location for life sciences manufacturing, taking products into commercial production and strengthening supply chains. When assessing applications to the Life Sciences Innovative Manufacturing Fund, give proper weight to the GMP and MedTech facilities already here, serviced sites and the region's record of delivering projects. This should include credible opportunities to keep strategically important production in the UK, bring it back or establish it here.

Support a regional demonstrator with Loughborough University's UK SCALE Centre. This would identify weaknesses in critical medicines and healthcare supply chains, test how manufacturing could adapt to changing needs and help the UK prepare for emergencies.

WHO DO WE NEED: Office for Life Sciences, Department for Business, Innovation, Science and Trade (BIST); Department of Health and Social Care, including its medicines supply and resilience teams; Innovate UK; East Midlands Freeport; and the UK SCALE Centre at Loughborough University.

WHAT THIS WOULD ACHIEVE FOR THE UK: Greater capacity to manufacture medicines, diagnostics and MedTech here, with more reliable supply chains. It would also help secure investment that could otherwise go overseas and create highly skilled jobs.

HOW THE REGION WOULD DELIVER: Charnwood Campus, BioCity Nottingham, MTIF, LUSEP, University of Nottingham Innovation Park (UNIP), Nottingham Science Park and East Midlands Freeport could work together through an EMLSC manufacturing and scale-up working group.

EXISTING PROGRAMMES: The Life Sciences Innovative Manufacturing Fund (£520 million in capital funding, open until March 2030, with a minimum project size of £8 million), the Life Sciences Sector Plan and the Modern Industrial Strategy.

We should also explore links with EMCCA's Local Innovation Partnerships Fund (LPIF) bid, looking at how its proposed manufacturing capabilities could help life sciences businesses scale up and move into commercial production.

ASK 02
An independent economic assessment of the cluster

Jointly fund an independent economic assessment of the East Midlands life sciences cluster with regional partners. It should use a clear, consistent geographical boundary and a sound methodology to measure the companies and operating sites here, their employment, turnover and GVA.

The assessment should also examine supply-chain activity, identify vulnerabilities and estimate the wider economic activity supported by spending from those businesses and their employees.

WHO: Department for Business, Innovation, Science and Trade (BIST), Office for Life Sciences; East Midlands Combined County Authority; Leicester, Leicestershire and Rutland partners; No.10 North

WHAT THIS WOULD ACHIEVE FOR THE UK: Reliable evidence to inform investment decisions, comparable with that available for Liverpool City Region and Greater Manchester. It would also provide a published baseline against which we can measure future growth.

HOW THE REGION WOULD DELIVER: EMLSC can lead a joint commission with EMCCA, LLR partners, universities and local authorities. The findings would be published openly.

EXISTING EVIDENCE AND APPROACHES: OLS statistics, the EMCCA East Midlands Growth Plan and established methods used to assess other clusters in England.

ASK 03
An East Midlands Innovation Adoption Demonstrator

Establish an East Midlands Innovation Adoption Demonstrator to give companies a clearer route from clinical validation to NHS use. It would bring together regulatory and commercialisation support, the collection of real-world evidence, procurement and deployment in the NHS.

Companies would know where to start and could access coordinated support at the stages where they most need it. NHS organisations would have clear responsibility and authority for the decisions they need to make.

WHO DO WE NEED: Department of Health and Social Care, NHS England and its successor arrangements within DHSC; Health Innovation East Midlands; the region's integrated care boards; NIHR; Office for Life Sciences

WHAT THIS WOULD MEAN FOR THE UK: Help the NHS adopt proven innovations sooner and more consistently, improving patient outcomes and giving UK companies a clearer route to market. The approach could be used elsewhere in the country and help retain more of the clinical and economic benefits in the UK.

HOW THE REGION COULD DELIVER: Health Innovation East Midlands would work with acute trusts, integrated care boards, NIHR research infrastructure, the National Rehabilitation Centre and industry.

EXISTING PROGRAMMES AND POLICIES: Health Innovation Network commissioning, NIHR research infrastructure, the SPARK programme and the Life Sciences Sector Plan's commitments on adoption. The demonstrator would also build on the NHS Modernisation Bill's strengthening of integrated care boards' role as strategic commissioners.

ASK 04
Recognition as the region's convening partnership

Recognise the East Midlands Life Sciences Cluster as the main regional partnership bringing the sector together and coordinating delivery. Involve EMLSC in developing policy, discussing investment and taking part in national programmes.

WHO DO WE NEED: Office for Life Sciences, Department for Business, Innovation, Science and Trade (BIST); No.10 North; East Midlands Combined County Authority; LLR partners; British Business Bank; Innovate UK

WHAT THIS WOULD MEAN FOR THE UK: Government and investors would have one accountable regional point of contact. This would reduce duplicated effort and help the region compete for national and international opportunities.

HOW THE REGION CAN DELIVER: EMLSC would operate as an industry-led partnership of companies, universities, NHS organisations, local authorities and investors. It would have clear, transparent governance and report publicly on progress each year.

EXISTING ARRANGEMENTS: OLS and BIST's work with clusters, devolution arrangements in the East Midlands and similar partnerships already recognised in other English regions.

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ASK 05
An employer-led life sciences skills programme

Support an East Midlands life sciences skills programme shaped by employers' needs. It could cover pharmaceutical manufacturing, MedTech, diagnostics, regulatory science, digital skills and AI-enabled production. Employers and education providers would agree where the gaps are and expand apprenticeships, technical qualifications and industry placements to address them.

WHO DO WE NEED: Department for Work and Pensions, Skills England; Department for Education (for under-19 and higher education provision); East Midlands Combined County Authority; regional further education colleges and universities; employers

WHAT THIS COULD MEAN FOR THE UK: Help fill critical shortages in laboratory, GMP, quality, regulatory and digital manufacturing roles. This would give businesses greater confidence to invest in manufacturing and open life sciences careers to more people.

HOW THE REGION CAN DELIVER: An EMLSC skills working group would bring together the East Midlands Institute of Technology (EMIOT), employers, colleges, universities and Careers Hubs. Its work would follow a published analysis of the roles and skills the sector needs.

EXISTING SCHEMES: Skills England's assessments of sector skills needs, the apprenticeship and technical education system, and regional careers and employer engagement programmes already in place.

What Government action would unlock

Each ask is small relative to what it would release, because the underlying infrastructure has already been built and paid for.

The five asks are modest compared with what they could help the region achieve. Companies, universities, the NHS and earlier public investment have already paid for much of the laboratories, GMP suites, clinical research facilities, campuses and logistics infrastructure.

We now need national programmes to recognise those assets and help us make better use of them. That means having reliable economic evidence, a clearer route into NHS use and one regional identify, one point of contact for Government and investors. It also means training people for the jobs employers need to fill.

Addressing these gaps would cost relatively little compared with the investment already made. Leaving them unresolved risks losing further investment, jobs and opportunities to get treatments to patients.

Where	What is already here	What action could achieve
Manufacturing and resilience	Established GMP and MedTech facilities, serviced sites and skilled people across Charnwood, Nottingham, Leicester and Derbyshire.	More medicines, diagnostics and devices made in the UK, with less reliance on vulnerable supply chains. A stronger chance of securing investments for which companies currently favour Ireland, Germany and Singapore.
Evidence and investability	An established regional life sciences economy, but no independently validated economic baseline. National datasets do not fully capture the cluster.	A fair comparison with other UK clusters, stronger evidence for funding applications and a way to measure the return on government investment.
NHS adoption	Three research-active acute trusts, two Biomedical Research Centres, a diverse population with many people living with several long-term conditions, an established innovation adoption body and the new National Rehabilitation Centre.	A model that could help the NHS use proven innovations routinely across the country. Earlier access for patients, a clearer route into the NHS for UK companies and more of the resulting value kept in the UK.
Coordination	An industry-led partnership already bringing together companies, universities, NHS bodies and local authorities.	One accountable point of contact for Government, with fewer competing proposals covering only parts of the region. More joint bids, projects and investment that make use of the expertise and facilities already here.
Skills	Six universities, a large further education network and employers who know which jobs they are struggling to fill.	Greater confidence to expand manufacturing, technical careers open to more people and a workforce with the skills needed for AI-enabled and digital production.

The sector's offer in return

We are proposing a partnership with clear commitments from the region that industry will lead, deliver within twelve months and report on publicly.

The East Midlands Life Sciences Cluster campaign already has committed private funding partners. We can begin this first phase without waiting for a government decision. Government support would help us do more and make progress sooner.

What industry will deliver within twelve months

Commitment	What the campaign will deliver
Launch and identity	Publish this Position Paper, launch the cluster publicly and give the region's life sciences sector one recognised platform.
Working together	Bring universities, NHS organisations, businesses, local authorities and investors together through working groups covering manufacturing and scale-up, investment, skills, and research and adoption. Each group with a twelve-month delivery plan.*
Shared evidence	Maintain an agreed regional asset map, a consistent set of figures and an evidence register with full references. Every figure will show the geographical area it covers, helping partners, MPs and inward investment teams use the same evidence when describing the region.
Investment prospectus	Publish a prospectus for investors covering the region's research, clinical, manufacturing and commercial assets, available sites, facilities for scale-up and priority investment opportunities.
Finance and scale-up support	Start developing a guide to commercialisation programmes, accelerators, spinout support, investor networks and specialist advisers – publish on EMLSC website. This will include Nottingham Technology Ventures, SPARK The Midlands and Midlands Mindforge. It will explain their roles in developing new ventures, taking research through pre-clinical development and accessing investment. It will also identify gaps that partners need to address together.
Careers and skills	Bring together existing information on career pathways, apprenticeships and placements, and promote it through campaign channels and employer events.
Public reporting	Publish an annual report showing what we have delivered, which partners have been involved, progress on policy and investment opportunities, and priorities for the following year.

Section 5 sets out both phases in full. The second phase would include a White Paper, the independent economic assessment, a manufacturing and supply-chain resilience roadmap and an offer to help international businesses establish themselves in the region.

* The manufacturing and scale-up, investment and skills working groups are taking shape. Early discussions involve the UK SCALE Centre and Loughborough University on manufacturing, the East Midlands Institute of Technology and employers on skills, and family offices and other investors on investment. A research and adoption group will depend on the resources and commitment of partners from the NHS, NIHR, Health Innovation East Midlands and the National Rehabilitation Centres.

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Contents

THE NATIONAL CASE

The proposition 04
Executive summary 06
The five asks at a glance 17
What Government action would unlock 24
The sector's offer in return 26

VISION AND PERSPECTIVES

Our vision 30
Perspectives 32

EVIDENCE AND ARGUMENT

01 The national challenge 39
1.1 Competitiveness is eroding 41
1.2 NHS innovation and adoption constraints 42
1.3 The policy coherence gap 43

02 The Discovery to Manufacture Arc 45
2.1 A proven record in medicines discovery, development and manufacture 47
2.2 Regional capability map 52

03 Structural barriers requiring national partnership 81
3.1 Manufacturing competitiveness, industrialisation and skills 82
3.2 Commercialisation and access to growth capital 84
3.3 NHS integration and innovation adoption 86
3.4 Governance, coordination and national visibility 87
3.5 The cost of fragmentation 88

04 Five asks of central government 59

05. What the sector commits in return 105

06. Conclusion: a national opportunity 113

07. From Position Paper to delivery 117

From position paper to delivery 118
Acknowledgements 119
Appendices 121
Comments on data, geography and departmental names 122
Case study 123
References 128

Our vision

Our ambition is for the East Midlands to be recognised by 2035 as the UK's leading Discovery to Manufacture Arc, competing internationally and helping companies take discoveries through development, clinical research and commercial scale-up into manufacturing and NHS use.

The region's strength is the range of expertise and facilities available close together. We have discovery science, clinical research, pharmaceutical development and established commercial manufacturing, supported by specialist logistics and organisations helping innovations reach NHS patients. The campaign will help these organisations work together more effectively, so that companies can grow here and more investment, intellectual property and skilled jobs remain in the UK. This offer complements major manufacturing programmes in the North East and Scotland, with scope to collaborate where our specialisms can support one another.

Much of what we need is already here. The region has manufacturing facilities, research institutions and clinical networks, alongside an exceptional logistics location. Coordinated national investment and policy support would help us make better use of them, attract investment and strengthen domestic supply chains.

EMLSC is developing investment-ready proposals and delivery partnerships across the East Midlands. Devolution arrangements need to support collaboration across the whole cluster, reflecting how businesses, universities and NHS organisations already work together across administrative boundaries."[38] [39]

This Position Paper draws on the East Midlands Life Sciences Summit 2025, three regional industry roundtables and consultation with more than 125 private and public sector organisations.

The UKRI Strategy 2026–2031 and its delivery plan provide an opportunity to take this work forward. Backed by £38.6 billion of government investment, UKRI's five-year mission is to advance knowledge, improve lives and drive growth. Its priorities include helping innovative businesses start, scale and stay in the UK, strengthening research and innovation clusters, and investing in partnerships that respond to the strengths of individual places. It also seeks greater economic and social benefits from publicly funded research.[7] [8]

These priorities reflect what we heard from organisations across the East Midlands. Businesses need access to research and clinical expertise, suitable facilities and support at each stage of their development. The region has these strengths, including established pharmaceutical and MedTech manufacturing, good logistics connections and a substantial base of innovative companies. We need to make it easier for companies to find and use that support, from discovery through to production and adoption.

We also want to identify strategically important products, processes and supply-chain activities that could be kept in the UK, brought back or established here, where there is a clear case for doing so on resilience and value.

Through this work, the East Midlands can help deliver the UKRI mission, the Modern Industrial Strategy and the Life Sciences Sector Plan. Better regional coordination would help businesses become more productive and scale up, attract more inward and private investment, and create highly skilled jobs. It would also support more reliable UK manufacturing and supply chains, strengthen sovereign capability and improve health outcomes.[7] [9]

Keeping strategically important production here would contribute to the UK's economic security. It would reduce our exposure to vulnerable international supply chains and give us more capacity to respond to future health emergencies and economic disruption.

Perspectives

Contributions from partners across the East Midlands life sciences sector.

East Midlands
Life Sciences Cluster

Discovery to manufacture.
One connected region.

NHS innovation and adoption perspective

From innovation to patient benefit

The East Midlands has a unique opportunity to demonstrate how a flourishing and connected life sciences ecosystem can translate research excellence, and manufacturing capability into tangible patient benefit and economic value. While discovery and development are essential foundations, innovation only delivers value when patients can access it, clinicians can use it, and health systems can adopt it at scale. The final stage of the Discovery to Manufacture Arc is therefore not an endpoint but the point at which innovation fulfils its purpose.

Health Innovation East Midlands plays a critical role in this journey, acting as the bridge between innovators, industry, academia and the NHS. By supporting the evaluation, validation, adoption and spread of proven innovations, we help ensure that new technologies, diagnostics, medicines and models of care improve outcomes for patients while also delivering productivity gains and value for the health system and the East Midlands economy. In 2025/26 alone, HIEM supported 558 companies, positively affected more than 119,000 patients, released over 72,000 hours of NHS clinical time and supported over 100 active regional innovation projects.

Nicole McGlennon · Chief Executive, Health Innovation East Midlands

Industry perspective

Science at scale

Thermo Fisher Scientific is pleased to support the East Midlands Life Sciences Cluster Campaign and the ambition set out in this Position Paper.

The East Midlands combines a strong heritage in medicines discovery and development with nationally important capabilities spanning research, clinical innovation, manufacturing, diagnostics and supply. Greater recognition and coordination of these strengths can help the region attract investment, support growth and make an even stronger contribution to UK science and healthcare.

Our Loughborough site has been part of this ecosystem for more than 30 years and is a major UK hub for the distribution of laboratory products. Providing access to more than six million products, alongside specialist customer service and technical support, the site connects scientific research, production, testing laboratories, healthcare and science education across the East Midlands and the UK.

This experience demonstrates the importance of resilient scientific supply chains and the enabling infrastructure that allows innovation to progress from research into practical application. We welcome the campaign's work to bring the region's full life sciences capabilities together and strengthen their national visibility and impact.

Jim Bratherton · Thermo Fisher Scientific

Industry perspective

Development and manufacturing at Charnwood

Almac Pharma Services supports the East Midlands Life Sciences Cluster Campaign and recognises the value of promoting the region's capabilities on a broader stage.

The East Midlands combines a strong heritage in medicines discovery and development with specialist expertise spanning pharmaceutical development, clinical research, manufacturing and supply. Celebrating 10 years in the region, Almac Pharma Services' Charnwood Campus has become a firmly established part of this connected ecosystem, providing integrated pharmaceutical development and manufacturing services to global pharmaceutical and biotechnology companies, and supporting products across a wide range of therapeutic areas from early development through to commercialisation.

Much of the work undertaken by specialist development and manufacturing partners is embedded within confidential global programmes and is therefore not always visible as a regional contribution. The campaign provides an opportunity to showcase the breadth of expertise that exists across the East Midlands and highlights the important role the region continues to play in advancing pharmaceutical innovation and supply.

James Hurst · VP Operations and Charnwood Site Head, Almac Pharma Services

Industry perspective

Specialist manufacture and patient access

Nova Laboratories is pleased to support the East Midlands Life Sciences Cluster Campaign and its ambition to raise the national profile of the region's capabilities. The East Midlands brings together scientific expertise, specialist businesses, research institutions, NHS partners and manufacturing capability across the full journey from discovery to patient benefit. Greater visibility and coordination will help the region attract investment, support innovation and retain more of the value created within the UK. We welcome this industry-led campaign and its work to demonstrate the contribution the East Midlands can make to UK life sciences growth.

Peter White · Managing and Technical Director, Nova Laboratories Ltd

Industry perspective

Turning ideas into regulated products

Datalink Electronics is proud to support the East Midlands Life Sciences Cluster Campaign. The region's strength lies not only in generating new ideas, but also in the specialist businesses capable of transforming those ideas into reliable, regulated and commercially viable products. From our Loughborough base, Datalink works with businesses, universities and innovators across medical technology and scientific instrumentation, supporting the journey from initial concept and electronic design through prototyping, manufacture and ongoing product-lifecycle support. If the East Midlands is to retain more of the value created through its research and innovation, growing companies need access to the engineering expertise, trusted supply chains and manufacturing capacity required to bring products to market. This campaign provides an important opportunity to make those capabilities more visible and to show what the region can deliver.

Mariam Smith · Managing Director, Datalink Electronics

Industry perspective

Protecting and commercialising intellectual property

Marks & Clerk is proud to support the East Midlands Life Sciences Cluster Campaign and its ambition to secure greater national recognition and investment for the region.

The East Midlands combines a rich heritage in medicines and healthcare innovation with world-class capabilities across discovery, clinical research, advanced manufacturing and supply. Ensuring that intellectual property is protected and successfully commercialised will be critical to attracting investment, retaining value within the region and helping innovative businesses scale. We welcome the campaign's efforts to strengthen connections across the life sciences ecosystem, raise the region's national profile and create conditions for sustained innovation, investment and growth.

John Ferdinand · Managing Partner, Marks & Clerk

East Midlands
Life Sciences Cluster

The national challenge

Why the UK needs stronger regional delivery and what is currently being lost.

01

The national challenge

Life sciences is one of the UK's most important economic assets. Published figures for 2023/24 show £146.9 billion in turnover and 359,600 people employed across 7,320 companies. Biopharmaceuticals account for £98.9 billion of that turnover.[1]

The sector faces several pressures at once, but the policy response remains fragmented. Strong research does not consistently lead to business growth, better treatments or higher productivity. UK Research and Innovation has noted that the UK produces a large share of global research but retains less of the commercial value that follows than competing countries.[11]

Access to the investment needed to develop that research is also uneven. Universities across the wider Midlands have historically received around 1% of UK venture capital investment in university spinouts. Midlands spinouts raise just 15p for every £1 raised by comparable businesses in the Golden Triangle.[12] [13]

The UK needs to make better use of the research and businesses in its regional clusters. Helping them secure investment and reach commercial scale would support more UK-based production and bring growth to more parts of the country.

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1.1 Competitiveness is eroding

Life sciences companies have a choice about where they invest, run trials and manufacture. Recent figures suggest the UK is losing ground:

Patient access to new medicines. Only 65% of medicines authorised between 2020 and 2023 were available to patients in England, and 57% in Scotland. When uptake is slow or limited, companies have less incentive to launch medicines in the UK or invest here.[6]

Commercial clinical research. Recruitment to commercial clinical trials fell by 25% between 2022/23 and 2024/25. Industry studies account for just 3.4% of NHS trial participants, the lowest level since 2017/18. Only 27% of UK trial sites opened recruitment within the Government's 60-day target.[5]

Investment on hold. Around £2 billion of planned pharmaceutical investment in the UK has been paused or cancelled, including a £1 billion research centre in London and a £200 million development in Cambridge. Companies point to uncertainty over pricing and regulation, alongside operating costs.[4]

International competition. The United States, Ireland, Singapore and Germany continue to attract life sciences investment through manufacturing incentives, talent programmes and R&D tax measures. Changes to US science funding since 2025 have also prompted researchers and investors to reconsider where they work and invest. The UK has an opportunity to attract them if it can respond quickly.

There is some good news. In 2024, the UK ranked sixth globally for Phase III trial starts and attracted £4.5 billion in life sciences equity funding, the third-highest total worldwide.[5] [6] The effort should be made to keep those businesses here as they grow, with more medicines made in the UK, more jobs and better access to treatments for patients.

1.2 NHS innovation and adoption constraints

The NHS has the potential to lead Europe in clinical research and the use of healthcare innovation. Its integrated structure, large patient population and extensive health data make it a valuable partner for researchers and businesses. In practice, several barriers make this harder than it should be:

Procurement is often slow and cautious, with few routes for innovative products to reach patients through early access.

Staff shortages and administrative delays hold up clinical trials and make it harder for UK sites to recruit patients quickly.

Digital health innovations are adopted unevenly across integrated care systems, so we are not making full use of the UK's data infrastructure.

Researchers still face slow, fragmented access to good-quality clinical data from different NHS sites. This delays decisions about whether studies are feasible and makes it harder to gather evidence from routine care.

Secure Data Environments offer a way to improve access. They allow researchers and industry to use standardised data covering patients' care over time, drawn from several NHS organisations through one governance process. This can reduce study feasibility checks from months to hours and support research across multiple sites, AI development and the collection of real-world evidence. The Eastern England Secure Data Environment, developed with Health Innovation East, provides a working example.[34]

The NHS Modernisation Bill would transfer NHS England's functions to the Department of Health and Social Care and give integrated care boards a stronger role as the main strategic commissioners in local NHS systems. These changes would affect who makes decisions about adopting innovations. A regional demonstrator offers an opportunity to work with the new commissioning arrangements as they develop.[30]



1.3 The policy coherence gap

The Life Sciences Vision, the Modern Industrial Strategy, the AI Strategy and the 2025 Life Sciences Sector Plan all commit to supporting UK innovation, business growth and industrial capability. They are backed by substantial investment, including the £520 million Life Sciences Innovative Manufacturing Fund and up to £600 million from Government and the Wellcome Trust for the Health Data Research Service. The Sector Plan also recognises that manufacturing investment matters to the UK's ability to produce essential products, protect health and maintain reliable supplies.[9] [10] [36]

Businesses still have to find their way between separate programmes for research, commercialisation, manufacturing, finance, skills and NHS adoption. We need to bring that support together regionally, so companies can get the help they need at each stage.

Devolution could help us do this. Effective place-based growth requires national policy and investment to work alongside regional leadership, bringing together universities, businesses, local government and the NHS around shared economic priorities. The East Midlands offers an opportunity to demonstrate how this can be achieved across a functional economic geography that extends beyond individual administrative boundaries.

The UK Innovation Report 2026 describes the same difficulty. We invest heavily in research and innovation, but struggle to help businesses commercialise their work and grow; the integration of innovation with supply chains, skills and production are also weak.[11] Companies need suitable facilities, finance, skilled people and manufacturing expertise to take their ideas further. That strengthens the case for a place-based approach in which research is connected systematically to the infrastructure, capital, workforce and industrial capability required to turn ideas into value.

Much of this is already here in the East Midlands. We have research and clinical expertise, including teams that help turn research into treatments. We also have established life sciences manufacturers, advanced engineering businesses, specialist facilities and a substantial industrial base (see section 2).

The UKRI Strategy 2026–2031 supports breakthrough research, business growth, stronger clusters and regional partnerships. Its commitment to helping companies start, scale and stay in the UK fits what we are trying to achieve.[7] We now need to agree which programmes can support the region's plans, develop proposals that can attract investment and put the partnerships in place to carry them through.



East Midlands
Life Sciences Cluster

The Discovery to Manufacture Arc

A functional life sciences geography covering discovery, development, manufacture and NHS adoption.

02

The Discovery to Manufacture Arc

In this paper, we use **Discovery to Manufacture Arc, or D2M Arc**, to describe the East Midlands' life sciences sector and the strengths it brings together. It follows how organisations work across the region, from discovery science and translational research through clinical development, commercialisation, advanced manufacturing and NHS adoption. These relationships extend beyond administrative boundaries.

The Arc gives a name to facilities, expertise and working relationships built over many years. Through this campaign, we are bringing together the evidence of what is already here and presenting the region's capabilities together for the first time. We also want to help partners coordinate their work more closely.

The cluster spans Leicester, Leicestershire and Rutland; Derby and Derbyshire; and Nottingham and Nottinghamshire. Leicester, Loughborough, Nottingham and Derby each have significant research, clinical, innovation and industrial strengths, supported by specialist facilities and businesses across the surrounding counties. Their proximity and complementary expertise allow organisations to work together across the region.

2.1 A proven record in medicines discovery, development and manufacture

The Arc has grown from a long history of medicines and healthcare innovation. Products developed here have been used around the world, and much of the scientific expertise behind them remains in the region. In 2028, Loughborough will mark 60 years of drug discovery and pharmaceutical innovation. Nottingham's history reaches back more than a century, across healthcare research, product development and manufacturing.

The best-known example is ibuprofen, discovered by the Boots research team in Nottingham and selected for development in 1961. It launched as the prescription medicine Brufen in 1969, became available without prescription in the UK in 1983 and is now on the World Health Organization Model List of Essential Medicines. E45 Cream was also created in Nottingham, by a Boots chemist in 1952. Later pharmaceutical research produced flosequinan and sibutramine. These products had different commercial histories, but they show the range of medicines research and development carried out in the region.

Changes in ownership did not mean that all the knowledge, brands or manufacturing left. In 2006, Reckitt acquired Boots Healthcare International, including Nurofen and Strepsils, along with associated intellectual property and manufacturing assets. Reckitt still operates an MHRA-authorised, GMP-compliant pharmaceutical manufacturing site on Thane Road in Nottingham. Its regulated activities include manufacturing non-sterile medicines and tablets, packaging and quality-control testing. It can also manufacture non-sterile investigational medicines, including tablets and medicated lozenges. The site connects Nottingham's history of consumer-health innovation with the medicines manufacturing and clinical-development work taking place there today.

Boots also remains an important part of healthcare in the region and across the UK, although its role has changed. Its network of more than 1,800 stores and community pharmacies offers familiar, accessible places where patients can benefit from new services, diagnostics, technologies and approaches to care.

In 2026, Boots and Civia Health established dedicated clinical-research units in four flagship stores, including Nottingham. This brings participation in commercial clinical trials onto the high street. The first planned study was a Phase III trial of a new treatment for obesity and type 2 diabetes, with support for participant screening, recruitment and a health registry following participants over time.

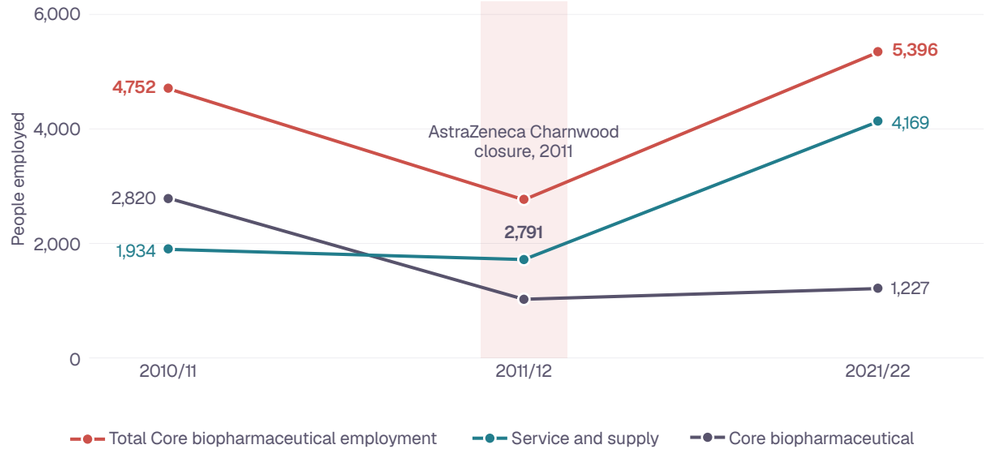
Boots has also helped recruit participants to Our Future Health and supported research into whether appropriately governed use of Boots Advantage.

From major corporate employers to a wider network of businesses

For much of the twentieth century, Boots and later AstraZeneca gave the East Midlands a recognisable pharmaceutical identity. That changed as Boots reduced its pharmaceutical research and AstraZeneca closed its Charnwood R&D site in 2011. The impact was substantial: biopharmaceutical employment in the East Midlands fell by around 41% between 2010/11 and 2011/12.[3]

Many scientists stayed in the region, starting their own businesses or helping specialist companies grow. Universities established spinouts, and former corporate laboratories were brought back into use at BioCity Nottingham and Charnwood Campus. Further investment added research, development and manufacturing facilities.

Over time, employment recovered and the number of sites increased. Work once concentrated in a few large companies spread across businesses specialising in contract research, development, manufacturing and related services. Together, they give the region a breadth of expertise that is easy to overlook when looking at each company separately.[3]



East Midlands biopharmaceutical employment: closure shock and recovery, 2010/11 to 2021/22.

Source: Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2021 to 2022, site-based data tables.[3] Units: people employed. Geography: East Midlands ITL1 statistical region.

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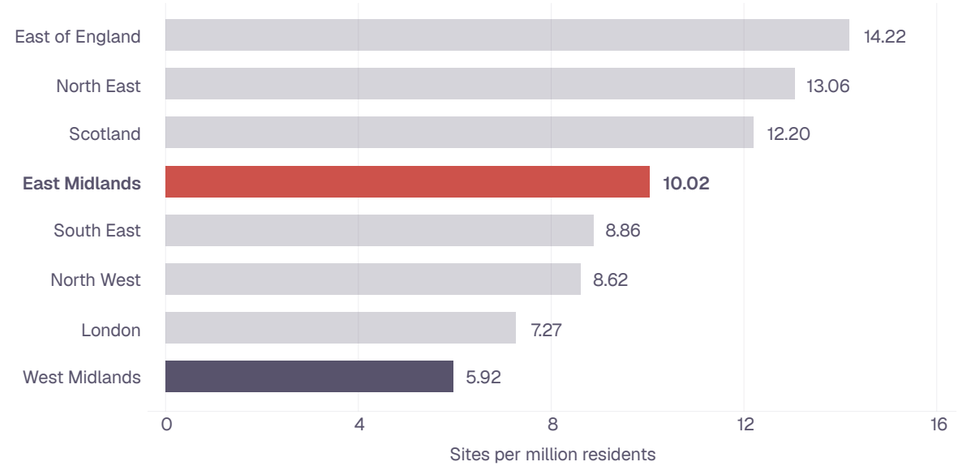
Change, comparison and national position

Indicator	East Midlands evidence	Change or comparison	National significance
Post-closure employment shock	Biopharmaceutical employment fell from 4,754 to 2,791[3]	–41% between 2010/11 and 2011/12	A severe but temporary employment shock
Employment recovery	5,396 biopharmaceutical jobs in 2021/223	13.5% above 2010/11; 93% above the post-closure trough	Employment recovered beyond its pre-closure level
Services and supply employment	Rose from 1,934 to 4,169 jobs[3]	+116% between 2010/11 and 2021/22	A structural shift towards specialist research, development and supply businesses
Services and supply sites	Rose from 83 to 115 sites[3]	+39% between 2010/11 and 2021/22	Growth and diversification of the specialist company base
Contract research and manufacturing sites	50 OLS-classified sites in 2021/22[3]	West Midlands: 36. East Midlands 39% higher	A substantial concentration of contract research and manufacturing capability
Site density per head	10.02 sites per million residents[3]	West Midlands: 5.92. East Midlands around 69% higher	Fourth-highest density among the twelve UK nations and English regions
Biopharmaceutical companies	147 companies in 2023/24[1]	West Midlands: 119. East Midlands 24% more	Sixth-highest company total nationally
Biopharmaceutical employment	8,007 jobs in 2023/24[1]	West Midlands: 8,204. East Midlands at 98% of that total	Sixth-highest employment total nationally
Biopharmaceutical turnover	£2.85bn in 2023/24[1]	West Midlands: £4.42bn. East Midlands at 65% of that total	Sixth-highest nationally; substantial scale, with a clear value-retention and company-scaling opportunity
Primary R&D employment	2,163 jobs in 2023/24[1]	Around 60% higher than the West Midlands	Direct evidence of a substantial retained biopharmaceutical R&D workforce

Sources: Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2021 to 2022 (site-based series) and 2023 to 2024 (company-based series).[1]

The region's recovery shows how much can be built on existing skills and facilities. That expertise is now spread across a wider range of businesses, making the sector less visible (no one company name). The campaign aims to give it a shared identity and help those businesses work more closely together.



Density of OLS-classified contract research and manufacturing organisation sites, by UK nation and region, 2021/22.

Source: Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2021 to 2022 site dataset; ONS mid-2023 population estimates.[3]

2.2 Regional capability map

The map below shows the region's assets by capability and county, following the stages companies move through as they develop their products.

It shows the expertise and facilities already available across the full life sciences pathway. These can help businesses grow, attract investment, support advanced manufacturing, strengthen supply chains and improve health outcomes.

Discovery and translation

Discovery science, translational medicine and the research infrastructure underpinning the region's innovation pipeline.

Universities and research excellence

University of Leicester, Leicester

NIHR Leicester Biomedical Research Centre; Institute for Precision Health; Leicester Drug Discovery & Diagnostics. Major strengths in precision health, cardiovascular, respiratory and metabolic research, genomics and translational medicine.

University of Nottingham, Nottingham

NIHR Nottingham Biomedical Research Centre; Sir Peter Mansfield Imaging Centre, building on Nottingham's pioneering role in the development of MRI; and the UK's National Facility for Ultra-High Field Human Magnetic Resonance, being developed around an 11.7T MRI scanner and expected to become operational in 2028. Strengths across biomedical sciences, drug discovery, advanced therapeutics and translational research.

Nottingham Trent University, Nottingham

Medical Technologies Innovation Facility (MTIF): specialist research, development, testing and innovation infrastructure bridging academic and clinical research with commercial medical technology development.

Loughborough University, Leicestershire

World-leading sport and exercise science; National Centre for Sport and Exercise Medicine – East Midlands; strengths in rehabilitation science, regenerative medicine, biomedical engineering and digital health. Hosts the UK SCALE Centre, the UK node of the MIT Global SCALE Network, and the National Interdisciplinary Centre for the Circular Chemical Economy.

De Montfort University, Leicester

Established expertise in pharmaceutical technologies and Quality by Design approaches in pharmaceutical manufacturing and training, now extending into Quality by Digital Design through the Digital CMC Centre of Excellence in Regulatory Science and Innovation.

University of Derby, Derby

Growing biomedical and clinical science capability, including the £1.75 million Facility for Omics Research in Metabolism (FORM) and the £5.8 million Bioscience Superlab and Research Lab, supporting multi-omics, molecular biology, microbiology, immunology, cell and tissue culture and translational research.

Specialist research institutes and centres

Biodiscovery Institute, University of Nottingham, Nottingham

A major interdisciplinary discovery and translation institute housing around 1,000 researchers, clinicians, support staff and collaborators across approximately 90 independent research groups, with more than £400 million in research funding secured since 2014.[23] Capabilities span therapeutics, cancer, regenerative medicine, advanced disease models, biofilms and microbial systems, with a strong record of spinout formation.

Leicester Cancer Research Centre and Hope Cancer Trials Centre, Leicester

Nationally significant cancer research and early-phase trials capability with strengths in haematological malignancies, mesothelioma, precision therapeutics, cancer prevention, liquid biopsy and pre-clinical drug-discovery models. The Hope Cancer Trials Centre at Leicester Royal Infirmary provides dedicated infrastructure for patients to access experimental medicines.

Leicester Diabetes Centre, Leicester

A major clinical and translational research centre focused on the prevention, treatment and management of diabetes, obesity and related long-term conditions, based at Leicester General Hospital, with substantial experience in large-scale and industry-sponsored studies.

Translational research platforms

NIHR Leicester Biomedical Research Centre, Leicester

University of Leicester and University Hospitals of Leicester NHS Trust. A nationally designated centre translating research into patient care, with internationally recognised strengths in cardiovascular disease, respiratory medicine, diabetes and metabolic health, lifestyle medicine and precision health.

NIHR Nottingham Biomedical Research Centre, Nottingham

University of Nottingham and Nottingham University Hospitals NHS Trust. A nationally designated centre accelerating translation into clinical practice, with leading expertise in advanced therapeutics, regenerative medicine, surgical innovation, musculoskeletal disease, hearing, imaging, mental health and rehabilitation.

Leicester Clinical Trials Unit, Leicester

A specialist trials unit supporting the design and delivery of studies across cancer, cardiovascular and respiratory disease, diabetes, lifestyle, primary care and women's and children's health.

MTIF Clifton Research Facility, Nottingham

Multidisciplinary research, testing and development infrastructure supporting medical technology development.

Development and manufacturing

One of the UK's most complete concentrations of pharmaceutical development, contract research, manufacturing and commercial scale-up capability.

Strategic innovation campuses

Charnwood Campus Science, Innovation and Technology Park, Leicestershire

The UK's first Life Sciences Opportunity Zone, endorsed in 2017, on the 70-acre former AstraZeneca pharmaceutical R&D site at Loughborough, with substantial legacy laboratory, development and GMP manufacturing infrastructure and more than 800 scientists on site. Home to Almac Pharma Services, Kindeva Drug Delivery and Solventum. Approaching 60 years of drug discovery heritage in 2028.

BioCity Nottingham (Pioneer Group), Nottingham

A major life sciences incubation and commercialisation environment created from the former Boots pharmaceutical research laboratories, with a longstanding role in supporting biotechnology, pharmaceutical, healthcare and MedTech companies.

MediCity, Nottingham

An innovation environment for consumer health, diagnostics, medical technologies and beauty innovation, created as a collaboration between Boots and BioCity and the first new business to open on the Nottingham Enterprise Zone in November 2013. It provides laboratory and office space, shared equipment, mentoring and access to global healthcare market expertise.

University of Nottingham Innovation Park (UNIP), Nottingham

A university-linked science and innovation community providing premises, business support and access to academic research for start-ups and growing technology businesses, supporting collaboration and commercialisation.

Loughborough University Science and Enterprise Park (LUSEP), Leicestershire

A science and enterprise park providing scale-up space and university proximity for research-intensive and technology businesses.

Nottingham Science Park, Nottingham

An established science and technology business park adjacent to the University of Nottingham, providing office and workspace for research-led businesses, including biotechnology, digital technology and other innovation sectors.

Drug discovery, cro and cdmo capability

Quotient Sciences, Nottinghamshire

An integrated drug-development and manufacturing organisation combining formulation development, clinical manufacturing, clinical pharmacology and early-phase clinical studies. Its Nottingham campus includes manufacturing and clinical facilities, allowing medicines to move rapidly from formulation into human studies. Originated in 1990 as Pharmaceutical Profiles, a University of Nottingham spin-out.

Reckitt, Nottinghamshire

A major global consumer-health and hygiene company operating an established pharmaceutical manufacturing site on Thane Road. The MHRA-authorised and GMP-compliant operation provides regulated manufacturing, quality-control and technical capability, including non-sterile medicines, tablets, medicated lozenges and investigational medicinal products. Reckitt's continuing presence strengthens Nottingham's position in consumer-health innovation, regulated production and resilient UK medicines supply.

Sygnature Discovery, Nottinghamshire

A major integrated drug-discovery contract research organisation headquartered at BioCity Nottingham, providing capabilities across target validation, hit identification, medicinal chemistry, lead optimisation and pre-clinical development. Has grown by acquisition, including the Nottingham-founded XenoGesis DMPK business.

Upperton Pharma Solutions, Nottinghamshire

A pharmaceutical CDMO with a 50,000 sq ft development and GMP manufacturing facility at Trent Gateway. Capabilities include formulation development, analytical testing, clinical-trial manufacturing and scale-up across oral, nasal and pulmonary dosage forms.

Codis (formerly Catalent Nottingham), Nottinghamshire

Following completion of Codis's acquisition of Catalent's Nottingham facility in August 2026, the site provides formulation and analytical development, development-scale spray drying, bioavailability enhancement, oral solid-dose development, clinical supply and small-scale commercial manufacturing. The transaction retains more than two decades of specialist drug-product expertise in Nottingham.

Crown Bioscience, Leicestershire

A global preclinical and translational oncology CRO providing in vivo and in vitro models, patient-derived xenografts, tumour organoids, imaging and biomarker services for oncology and immuno-oncology drug development.

Concept Life Sciences, Derbyshire

An integrated drug-discovery and development CRO headquartered at Chapel-en-le-Frith, where an expanded facility opened in 2025 bringing chemistry, ADMET and screening biology together on one site with around 130 scientists. Capabilities span medicinal and computational chemistry, screening biology, ADMET and DMPK, analytical services, process research and scale-up.

Inotiv, Derbyshire

A non-clinical discovery and development CRO providing pharmacology, toxicology, safety assessment, analytical services and research models to pharmaceutical, biotechnology and medical-device companies.

Pharmaron, Northamptonshire

A global CRDMO operating a centre of excellence for radiolabelled sciences at Rushden, combining clinical and preclinical metabolism, ADME, drug-drug interaction studies, metabolite identification, analytical chemistry and radiochemistry with regulated API and investigational medicinal product manufacture.

Sterling Pharma Solutions, Leicestershire

A contract development and manufacturing organisation providing pharmaceutical development and manufacturing services, recorded at Loughborough in the regional asset record (Appendix 3).

Reach Separations (CatSci Group), Nottinghamshire

Based at BioCity Nottingham and part of CatSci Group since 2024, providing chromatography, separation science and purification services, including chiral and achiral purification and supercritical-fluid chromatography, supporting programmes from discovery through development and manufacture.

Cellomatics Biosciences, Nottinghamshire

A specialist preclinical CRO at Colwick providing complex human cell-based assays and disease models across oncology, immuno-oncology, immunology, inflammation and respiratory disease, supporting assay development, target validation, compound screening and biomarker analysis.

Agility Life Sciences, Nottinghamshire

A pharmaceutical development business based in Stapleford, supporting formulation strategy, product development and chemistry, manufacturing and controls for biotechnology and pharmaceutical clients.

Bionical Emas, Derbyshire

A UK-headquartered international clinical research, early-access and clinical-trial supply business based in Willington, supporting clinical development, evidence generation, access to investigational medicines and international supply of products for clinical studies.

Sartorius Albumedix, Nottinghamshire

A 72,000 sq ft centre of excellence for the development and GMP manufacture of recombinant human albumin. Nottingham-produced materials are used internationally in advanced therapies, vaccines and biopharmaceutical manufacturing.

Source BioScience, Nottinghamshire

A specialist laboratory-services business providing genomics, multi-omics, histopathology, molecular diagnostics and digital-pathology services, combining laboratory capability with regulated diagnostic services and growing expertise in AI-enabled pathology.

Almac Pharma Services, Leicestershire

A major pharmaceutical development and manufacturing operation at Charnwood Campus providing formulation development, analytical testing and GMP manufacture of solid oral dosage forms for clinical trials and commercial supply. Marking ten years in the region.

Almac Clinical Technologies, Leicestershire

A digital clinical-trials capability providing eClinical platforms for patient randomisation, trial-supply management, eConsent, electronic clinical outcome assessment, visit management and real-time trial oversight.

Kindeva Drug Delivery, Leicestershire

A drug-delivery CDMO with long-established expertise in inhalation and transdermal products, including formulation, device integration, analytical development, clinical supply and scalable manufacturing of pressurised metered-dose inhalers.

BioStatus, Leicestershire

Develops and manufactures fluorescent probes and live-sample handling reagents for cell-based research, supporting flow cytometry, fluorescence imaging and high-content screening, with ISO 9001:2015 manufacturing and international commercialisation from a UK base.

OncoTherics, Leicestershire

A biotechnology company developing unidirectional hypoxia-activated prodrugs, designed to target oxygen-deprived regions found across many solid tumours, combining oncology drug discovery, molecular-probe chemistry and translational development.

BioSuspensions, Leicestershire

A biotechnology company developing SpheruliTEK™, a structured-suspension technology enabling poorly soluble active ingredients to be presented as stable liquid formulations at much higher concentrations than conventional approaches.

BioTherics, Leicestershire

A biotechnology company developing targeted treatments for cardiovascular emergencies. Its lead candidate is an ischaemia-activated antiarrhythmic prodrug designed to release lidocaine selectively in oxygen-deprived heart tissue.

Pharmaceutical and healthcare manufacturing

Solventum, Leicestershire

The UK headquarters, at Charnwood Campus, of the global healthcare company separated from 3M in 2024, operating across medical technologies, wound care, dental solutions, health-information systems and purification technologies.

Boots, Nottingham

One of the region's most recognisable healthcare businesses, with its UK headquarters and major commercial operations at Beeston. The site carries a Royal Society of Chemistry National Chemical Landmark plaque marking the discovery of ibuprofen by Boots scientists. Boots co-founded MediCity with BioCity, and the Nottingham Enterprise Zone on its estate hosts the Medical Technologies Innovation Facility's cleanroom and clinical manufacturing site. Its national pharmacy network gives it a direct role in consumer health, innovation adoption and access to patients.

Nova Laboratories, Leicestershire

A family-owned specialist pharmaceutical manufacturer at Wigston, founded in 1989, producing licensed and unlicensed medicines, clinical-trial supplies and tailored pharmaceutical products. It holds MHRA specials, GMP and investigational medicinal product manufacturing licences and has FDA and EMA approvals covering contract manufacture of specialised therapies including CAR-T and AAV-based gene therapy, alongside aseptic spray-dried products.

STERIS, Leicestershire

A global provider of infection-prevention, sterilisation and contamination control products and services with an established operation at Syston, including the design and manufacture of products used to monitor sterilisation and decontamination of healthcare products.

Zydus Pharmaceuticals UK

The UK pharmaceutical operation of Zydus Lifesciences, based in Loughborough, providing a regional link to a major international pharmaceutical group and supporting the supply and commercialisation of medicines in the UK.

East Midlands Pharma, Leicestershire and Derbyshire

A regional pharmaceutical and consumer-health company operating from Rothley and Ilkeston, developing, supplying and commercialising licensed medicines, medical devices and consumer-health products, and operating a specialist small-batch sterile manufacturing facility producing ophthalmic and related products.

Brunel Healthcare Manufacturing, Derbyshire

An MHRA-authorised manufacturer at Swadlincote and a major UK producer of vitamins, minerals, nutritional supplements and consumer-health products, with product development, regulated manufacture, packaging and supply capability

Siemens Healthineers PETNET Solutions, Nottingham

An MHRA-authorised radiopharmaceutical manufacturing site at Nottingham City Hospital producing specialist PET radiopharmaceuticals for diagnostic imaging, adding regulated manufacturing to the region's strengths in clinical research, medical imaging and precision medicine.

Copley Scientific, Nottinghamshire

A globally recognised designer and manufacturer of pharmaceutical testing equipment, with particular strength in orally inhaled and nasal drug products, supplying specialist testing systems to pharmaceutical companies, laboratories and regulators internationally.

Thermo Fisher Scientific, Leicestershire

A major UK hub for the distribution of laboratory products, operating in Loughborough for more than 30 years. The site provides access to over six million products supporting scientific research, production, testing laboratories, healthcare and science education across the East Midlands and the UK, alongside specialist customer service and technical support.

Medical technology, diagnostics and digital health

Datalink Electronics, Leicestershire

A contract electronics design and manufacturing business at Loughborough with specialist expertise in medical devices, life-sciences instrumentation and regulated healthcare technologies, spanning electronic and embedded-system design, prototyping, PCB assembly, verification, testing and manufacture.

SureScreen Diagnostics, Derbyshire

A diagnostics company developing and manufacturing rapid diagnostic and point-of-care tests, with regional facilities supporting research, product development, production and warehousing across clinical diagnostics, occupational health and drug and alcohol testing.

Pennine Healthcare, Derbyshire

An employee-owned manufacturer of single-use sterile medical devices, procedure packs and healthcare consumables. Its purpose-built Derby facility employs around 180 people, includes three specialist cleanrooms and supplies the NHS and international markets across more than 50 countries.

Spirit Health, Leicestershire

A digital-health and healthcare-services company working with NHS organisations on remote monitoring, virtual wards, medicines optimisation and care closer to home. Its Clinitouch platform connects patients and clinical teams across multiple long-term conditions.

Enabling infrastructure, networks and finance

East Midlands Freeport, Regional

The UK's only inland Freeport, connecting nationally significant development sites with East Midlands Airport, the country's largest dedicated air cargo operation, and with major road and rail infrastructure. Projected to add around £9 billion GVA and 28,000 direct and indirect jobs.[19] The Life Sciences Sector Plan recognises the region's location, manufacturing capability and Freeport infrastructure as important strengths.

East Midlands Investment Zone, Regional

A £160 million, ten-year programme focused on advanced manufacturing and clean energy, expected to draw at least £383 million of private investment.[18] Not a dedicated life sciences programme, but its advanced manufacturing, digital and industrial capabilities are directly relevant to life sciences production and supply chains.

Medical Technologies Innovation Facility (MTIF) — Boots Enterprise Zone site, Nottingham

Cleanrooms, laboratories, prototyping and clinical-manufacturing capability for medical devices and technologies.

Space Park Leicester, Leicester

An innovation campus and enabling infrastructure asset supporting advanced instrumentation, data and engineering capability with applications in health technologies.

UK SCALE Centre, Loughborough University, Leicestershire

The UK node of the MIT Global SCALE Network, working on supply chains built for productivity, sustainability and resilience. With EMLSC, it has jointly developed the proposal for critical supply-chain and sovereign capability mapping set out in Ask 1.

East Midlands Combined County Authority, Regional

The mayoral combined county authority for Derby, Derbyshire, Nottingham and Nottinghamshire, responsible for the East Midlands Growth Plan and the East Midlands Investment Zone.

Leicester, Leicestershire and Rutland partners, Leicester, Leicestershire and Rutland

Local authorities and the Leicester and Leicestershire Business and Skills Partnership, leading economic growth and skills coordination in an area that does not yet have a devolution settlement.

Medilink Midlands, Regional

The life sciences industry membership network for the Midlands, supporting companies with business development, partnering and access to markets.

Midlands Innovation, Midlands-wide

A partnership of eight research-intensive Midlands universities, coordinating the Forging Ahead commercialisation programme and wider research collaboration.

British Business Bank, Regional activity

The Government's economic development bank, active in the region through regional investment funds, including the Midlands Engine Investment Fund.

Midlands Engine, Midlands-wide

A pan-Midlands economic partnership whose Observatory publishes wider health and life sciences cluster evidence.

SPARK The Midlands, Midlands-wide

A pre-clinical accelerator supporting the translation of healthcare research towards patient benefit, providing specialist mentoring, industry expertise and regulatory guidance to help projects progress towards commercialisation.

Midlands Mindforge, Midlands-wide

An investment company established by the eight Midlands Innovation universities to accelerate the commercialisation of university spin-outs and early-stage intellectual property-rich businesses, supporting access to capital and venture development.

Forging Ahead, Midlands-wide

A collaborative university programme strengthening research commercialisation through shared expertise, entrepreneurial support and connections between researchers, businesses and investors. Supports the expansion of programmes such as SPARK The Midlands into the East Midlands.

Clinical research and adoption

Research-active NHS organisations and national infrastructure enabling rapid evaluation, clinical trials and adoption of innovation.

Research-active NHS partners

Nottingham University Hospitals NHS Trust, Nottingham

A major teaching and research-intensive trust, home to the East Midlands Major Trauma Centre and the NIHR Nottingham Clinical Research Facility, and operator of the National Rehabilitation Centre.

University Hospitals of Leicester NHS Trust, Leicester

One of the largest NHS trusts in England and a major clinical research partner, working with the University of Leicester and regional partners on research, innovation and translation into practice.

University Hospitals of Derby and Burton NHS Foundation Trust, Derby

A major regional clinical and research partner serving a large population, with established participation in commercial and non-commercial clinical research and a UKCRC-registered Clinical Trials Support Unit.

Chesterfield Royal Hospital NHS Foundation Trust, Derbyshire

A research-active NHS partner extending recruitment reach across north Derbyshire.

Sherwood Forest Hospitals NHS Foundation Trust, Nottinghamshire

A research-active NHS partner extending recruitment reach across Nottinghamshire.

Nottinghamshire Healthcare NHS Foundation Trust, Nottinghamshire

A research-active provider of mental health, learning disability and community health services. Partners with the University of Nottingham in the Institute of Mental Health and MindTech, the NIHR HealthTech Research Centre for Mental Health, supporting the development and evaluation of technologies to improve mental healthcare.

Institute of Mental Health, Nottingham

A partnership between the University of Nottingham and Nottinghamshire Healthcare NHS Foundation Trust, bringing together clinical and academic expertise to improve understanding, prevention and treatment of mental illness. Hosts MindTech, the NIHR HealthTech Research Centre for Mental Health.

Nottingham Clinical Trials Unit, Nottingham

A specialist University of Nottingham trials unit supporting the design and delivery of multicentre clinical trials, with expertise in trial management, statistics, data management, health economics and quality assurance.

NHS research infrastructure

NIHR Leicester Clinical Research Facility, Leicester

A purpose-built early-phase and experimental medicine facility operating across Leicester Royal Infirmary, Glenfield Hospital and Leicester General Hospital, supporting complex studies in cardiovascular and respiratory medicine, cancer, diabetes and lifestyle research, and emergency and acute medicine.

NIHR Nottingham Clinical Research Facility, Nottingham

Dedicated adult and paediatric facilities supporting early-phase and complex experimental medicine studies across cancer, dementia, respiratory disease and other specialist areas, including emerging cellular therapy research.

NIHR Leicester BioResource, Leicester

Part of the national NIHR BioResource network, providing access to consented participants, health data and biological samples for studies examining the relationships between genetics, environment, health and disease.

NIHR Patient Recruitment Centre, Leicester

One of the five original national Patient Recruitment Centres, purpose-built for late-phase commercial delivery at speed and scale.

NIHR Applied Research Collaboration East Midlands (ARC EM), Regiona

A partnership bringing together NHS organisations, universities and health and care partners to deliver applied research, address regional health priorities and accelerate the translation of evidence into practice.

NIHR East Midlands Regional Research Delivery Network (RRDN), Regional

Part of the national NIHR Research Delivery Network, supporting the delivery of high-quality research across NHS, public health, social care and community settings, strengthening research capacity and opportunities for participation.

NIHR Research Support Service Hub — University of Leicester and Partners, Leicester; national remit

Provides free, confidential methodological advice to researchers developing funding applications in applied health, public health and social care, supporting robust research design and access to specialist expertise.

Centre for Healthcare Equipment & Technology Adoption (CHEATA), Nottingham

Based within Clinical Engineering at Nottingham University Hospitals NHS Trust, supporting the evaluation and adoption of medical technologies through health technology assessment and health economics expertise.

Clinical translation and adoption

Health Innovation East Midlands, Regional

The region's NHS innovation adoption infrastructure, connecting innovators, NHS organisations, academia and industry to identify, evaluate, spread and adopt innovation, with access to a national pipeline of more than 1,600 innovations and more than 100 active regional innovation projects.

Hope Cancer Trials Centre, Leicester

A specialist early-phase cancer research facility providing access to experimental medicines, precision oncology studies and commercial clinical trials.

Secure data environment capability, Regional

NHS-owned secure data environments provide access to de-identified health data and support research, real-world evidence, data-driven innovation and multi-organisation collaboration. The Eastern England Secure Data Environment, developed with Health Innovation East, is an established model of this approach.

Global pharmaceutical industry partnerships

Novartis, Regional collaborations

Collaborative-working projects with NHS and primary-care partners in Leicester and Nottingham, including University Hospitals of Leicester, supporting population-health initiatives, pathway improvement and appropriate adoption of innovative medicines.

Sanofi, Regional collaborations

Work with NHS partners across Leicester, Leicestershire and Rutland, Nottingham and Nottinghamshire, and Derby and Derbyshire, addressing respiratory disease, cardiovascular health, diabetes, dermatology and specialist treatment pathways.

AstraZeneca, Regional collaborations

Continuing work with NHS partners in Leicester and Leicestershire, including cardiovascular, renal and metabolic service-redesign projects with primary-care partners, focused on earlier identification, improved pathways and more equitable access to evidence-based treatment.

MSD, Regional collaborations

Partnership with the East Midlands Cancer Alliance and NHS trusts across the region on a systemic anti-cancer therapy demand and capacity programme, spanning cancer services in Leicester, Nottingham, Derby, Lincolnshire and Northamptonshire.

GSK, Regional collaborations

Work with Leicestershire and Northamptonshire NHS partners on adult-immunisation initiatives supporting improved vaccine uptake.

Amgen, Regional collaborations

Collaboration with University Hospitals of Leicester to increase specialist lipid-service capacity and improve identification and management of people at elevated cardiovascular risk, and with Nottingham University Hospitals and Sanofi on cardiovascular and lipid-management pathways.

Roche, Regional collaborations

Support for the implementation of the East Midlands Breast Pain Pathway, developing a reproducible community-based approach to assessing and managing patients presenting with breast pain.

Rehabilitation and chronic disease

A nationally distinctive concentration of rehabilitation science, clinical infrastructure and technology development supporting healthy ageing and long-term condition management.

National centres of excellence

National Rehabilitation Centre, Nottinghamshire

The UK's first NHS National Rehabilitation Centre: a £107 million, 70-bed specialist facility on the Stanford Hall estate near East Leake, operated by Nottingham University Hospitals NHS Trust, which admitted its first patient in September 2026. It brings clinical care together with research, innovation, education and training, and uses advanced robotic rehabilitation technology.

Defence Medical Rehabilitation Centre, Stanford Hall, Nottinghamshire

A nationally significant specialist defence rehabilitation facility located alongside the National Rehabilitation Centre, creating an unusual concentration of clinical expertise, rehabilitation science, training and technology development on a single estate.

Regional rehabilitation innovation ecosystem

National Centre for Sport and Exercise Medicine – East Midlands, Regional

An Olympic legacy initiative connecting university, NHS and clinical expertise across the region, with strengths in physical activity, musculoskeletal health, rehabilitation, regenerative medicine and the prevention and management of long-term conditions.

EMERGE – East Midlands Emerging RehabTech Growth Enterprise, Regional

A regional initiative supporting the development and commercialisation of rehabilitation technologies, co-led by the University of Nottingham, Loughborough University and the University of Derby and hosted by Nottingham Trent University's MTIF.

Loughborough rehabilitation and human performance capability, Leicestershire

Research strengths spanning rehabilitation, sport and exercise medicine, human performance, biomedical engineering and technologies supporting independent living and recovery.

Growing Rehabilitation Industries Project (GRIP), Regional

A regional collaboration that helped develop rehabilitation and MedTech capability across university, clinical and industry partners.

National Rehabilitation Centre Academic Network, Regional

Academic partners connected to the National Rehabilitation Centre, supporting rehabilitation research, education and training.

NIHR HealthTech Research Centre in Rehabilitation (RehabHRC), Nottingham; regional partnership and national remit

Hosted by Nottingham University Hospitals NHS Trust, in partnership with the University of Nottingham, Loughborough University and Nottingham Trent University. Brings together clinicians, researchers, patients and industry to develop and evaluate rehabilitation technologies, working closely with the National Rehabilitation Centre to support recovery, independence and adoption into care.

Healthy ageing and long-term conditions

NIHR Leicester BRC Lifestyle Theme, Leicester

A translational research programme addressing healthy ageing, physical activity, obesity, diabetes and multimorbidity, strengthening regional capability in prevention, rehabilitation and long-term condition management.

Nottingham BRC Musculoskeletal, Surgery, Inflammation and Recovery Theme, Nottingham

A nationally recognised programme advancing musculoskeletal health, surgical innovation, inflammation and recovery, linking clinical research at Nottingham University Hospitals with the National Rehabilitation Centre and the wider RehabTech ecosystem.

Regional chronic disease research capability, Regional

Strengths across Leicester, Nottingham, Loughborough and Derby in cardiovascular and respiratory disease, diabetes and metabolic health, musculoskeletal conditions, ageing and multimorbidity, connecting prevention, precision medicine, rehabilitation and long-term condition management.

Adjacent and cross-border capability

Assets immediately outside the East Midlands that are within practical working distance and are already used by regional companies. They are listed here for completeness and are not counted as East Midlands assets.

Warwickshire and the West Midlands

HORIBA MIRA and MIRA Technology Park, Warwickshire

A globally recognised centre for engineering, research, testing and technology development on the A5 at Nuneaton, minutes from the Leicestershire boundary. Expertise spans human factors, functional safety, connected systems, cybersecurity, simulation, product validation and advanced manufacturing, with clear application to medical technologies and rehabilitation. The HORIBA Analytical Solution Plaza on the same campus provides analytical and diagnostic technologies supporting clinical and veterinary diagnostics, biopharmaceuticals, and cell and gene therapy.

Manufacturing Technology Centre (MTC), Warwickshire

A High Value Manufacturing Catapult centre at Coventry, within routine working distance of the Leicestershire manufacturing base, providing advanced manufacturing process development, automation and digital manufacturing capability relevant to medicines and MedTech production.

The region has expertise across the full innovation pathway, from discovery science, precision medicine and advanced therapeutics to diagnostics, regulatory science, pre-clinical development and clinical trials. It also has pharmaceutical development, analytical sciences, formulation and drug delivery expertise, alongside medical technologies, digital health, commercial scale-up, GMP manufacturing and NHS adoption. A company can draw on this support to take a product from laboratory research to commercial manufacture within the region, helping keep its growth, intellectual property and production in the UK.

Having these capabilities close together is a commercial advantage. Few UK regions outside the Golden Triangle offer such a range of expertise alongside established industrial and manufacturing facilities. Lower costs also make the East Midlands attractive, particularly for businesses investing in specialist facilities and commercial-scale production.

Recent analysis by universities and investors highlights the importance of this proximity. Successful innovation economies tend to have research, investors, skilled people and industrial facilities close together, with strong working relationships between them.[12] Much of this is already here in the East Midlands.

2.3 A distinctive strength in rehabilitation and RehabTech

The East Midlands has strengths across medicines discovery, diagnostics, precision health, clinical research, pharmaceutical development, advanced manufacturing and NHS adoption. It also brings together an unusual concentration of expertise in rehabilitation, sport and exercise science and rehabilitation technology.

The National Rehabilitation Centre admitted its first patient in September 2026. This £107 million, 70-bed specialist NHS facility is operated by Nottingham University Hospitals NHS Trust. It sits alongside the Defence Medical Rehabilitation Centre on the Stanford Hall estate in Nottinghamshire, combining clinical care with research, innovation, education and training.[22] Together with the National Centre for Sport and Exercise Medicine, Loughborough's sport and exercise science expertise and the EMERGE RehabTech programme, it brings clinical, academic, engineering and commercial capabilities together in a combination found nowhere else in the UK.

The need for this work is growing. In mid-2024, 1.75 million people in the UK were aged 85 or over, representing 2.5% of the population.

By mid-2049, that figure is projected to reach 3.6 million, or 4.9%.[31] As more people live longer, often with several long-term conditions, demand will grow for rehabilitation technologies, assistive devices, digital and remote rehabilitation, and better ways to prevent ill health.

Developing this specialism would add to the region's established work in biopharma, drug discovery, therapeutics, diagnostics and pharmaceutical manufacturing. We want to grow rehabilitation expertise alongside the discovery, development and manufacturing businesses that remain central to the cluster.

2.4 Clinical research as a commercial advantage

The ability to run clinical trials matters when life sciences companies decide where to invest. The East Midlands offers a large, diverse patient population, an established record of recruitment and specialist facilities with national designations. These strengths can help attract international R&D investment, gather evidence sooner and encourage companies to keep more of their development and manufacturing work in the UK.[24] [25]

In 2024/25, the NIHR East Midlands portfolio supported 2,004 studies, including 871 actively recruiting, and recorded 96,778 participant enrolments. This was 9.2% of all NIHR-supported enrolments in England. The region ranked fourth among England's twelve Research Delivery Networks, ahead of the West Midlands, the East of England, South London and South Central.[14]

Leicester, Nottingham and Derby each contribute specialist expertise and facilities. Leicester has one of the five original NIHR Patient Recruitment Centres, alongside a Biomedical Research Centre, a Clinical Research Facility, an Experimental Cancer Medicine Centre and the NIHR BioResource. Nottingham has its Biomedical Research Centre and established experience in commercial research through primary care. Derby's UKCRC-registered Clinical Trials Support Unit provides trial design, statistics, data management and delivery to the standards sponsors require.

Commercial research brings private investment into the NHS, helps gather the evidence needed for regulatory decisions and gives patients earlier access to new treatments and technologies. Nationally, NIHR-supported commercial research delivered £1.2 billion of value to the NHS in 2024/25.[15] Trial registries show continuing internationally sponsored studies across Leicester, Nottingham and Derby in cancer, metabolic, cardiovascular, respiratory, renal and rare diseases, as well as medical technologies.[26]

The region already has substantial working relationships with industry. Leicester's Biomedical Research Centre alone has reported 33 collaborations with small and medium-sized enterprises, 75 with pharmaceutical companies, 15 with biotechnology companies and 26 with businesses outside life sciences. Together, these have attracted more than £40 million of industry investment since 2016. Formal partners include AstraZeneca and MedImmune, Novartis, Novo Nordisk, Boehringer Ingelheim, Bristol Myers Squibb, Bayer and Janssen. The centre reports a further £10 in research grant funding for every £1 of NIHR investment.[35]

Some facilities were established specifically for commercial research. Leicester's Patient Recruitment Centre was among the first NIHR facilities funded wholly to deliver research paid for by the life sciences industry. One of five centres nationally, it is designed for Phase III and Phase IV studies requiring large numbers of patients and uses standardised commercial contracts. It specialises in common chronic conditions usually managed in primary care, community services and other settings outside hospital.[35]

Research also reaches patients through general practice. Around 40% of the 132 practices in Leicester, Leicestershire and Rutland are research active. This helps researchers run pragmatic trials, gather real-world evidence and study conditions managed outside hospital.[35] In Nottingham, one primary-care portfolio alone has 18 commercial projects being set up or already open, with expected NHS income of around £1 million.

The region has also shown that it can recruit quickly under pressure. More than 52,000 people across Leicester, Leicestershire and Rutland were newly recruited into research studies during 2019/20 and 2020/21. University Hospitals of Leicester recruited more patients to the RECOVERY trial than any other UK centre, more than twice the number enrolled by the next highest trust. Leicester's Patient Recruitment Centre ranked third worldwide for recruitment to the ENSEMBLE vaccine trial, reaching its target within weeks of opening.[35] This record gives sponsors confidence that studies can recruit the patients they need.

Bringing these capabilities together in a regional offer would help companies find suitable sites and partners. Clinical research connects patients and the NHS with businesses developing new products. It can also help attract further development, adoption, scale-up and manufacturing work to the region, strengthening the Discovery to Manufacture Arc.

WHERE THE REGION LEADS

Research delivery at scale. Fourth of England's twelve Research Delivery Networks for participant enrolment in 2024/25, recruiting more participants than the West Midlands, the East of England, South London and South Central.[14]

Contract research and manufacturing density. Fourth-highest density of OLS-classified contract research and manufacturing sites among UK nations and regions, and around 69% above the West Midlands per head.[3]

Retained industrial R&D. Around 60% more primary R&D employment than the West Midlands in 2023/24, on fewer primary R&D companies — a measure of depth rather than count.[1]

Rehabilitation. The UK's only National Rehabilitation Centre, co-located with the Defence Medical Rehabilitation Centre on a single estate.[22]

Inland trade and logistics. The UK's only inland Freeport, built around the country's largest dedicated air cargo operation.[19]

Inclusive recruitment. Leicester has one of England's most ethnically diverse city populations, which matters commercially for diabetes, cardiovascular, renal, respiratory and genomics studies intended to reflect real NHS populations.[25]

Recruitment under pressure. University Hospitals of Leicester was the UK's highest-recruiting centre to the RECOVERY trial, and Leicester's Patient Recruitment Centre ranked third in the world for recruitment to the ENSEMBLE vaccine trial.[35]

EAST MIDLANDS CLINICAL RESEARCH PROFILE

Measure	East Midlands baseline	Strategic significance
NIHR portfolio, 2024/25	2,004 supported studies; 871 recruiting	A large active delivery portfolio
Participant enrolments	96,778 enrolments; 9.2% of England's total	Fourth of England's twelve research delivery regions
Commercial delivery infrastructure	Leicester Patient Recruitment Centre, Clinical Research Facility, Biomedical Research Centre, Experimental Cancer Medicine Centre and BioResource	An end-to-end commercial research pathway in one city
Industry collaboration	Leicester BRC: 33 SME, 75 pharmaceutical, 15 biotechnology and 26 non-life-sciences collaborations; over £40m industry investment since 2016	Demonstrated commercial pull-through
Primary care reach	40% of 132 LLR general practices research active	Recruitment in community and non-hospital settings
Nottingham commercial example	18 commercial primary-care projects in set-up or open; around £1m expected NHS income	Direct NHS commercial value
Derby capability	UKCRC-registered Clinical Trials Support Unit	Sponsor-grade trial design and management
International sponsor signal	Repeated international sponsor activity across Leicester, Nottingham and Derby	A strong market indicator of site selection

Sources: NIHR Research Delivery Network Portfolio Data 2024/25; Leicester, Leicestershire and Rutland ICS research strategy; University Hospitals of Derby and Burton; ClinicalTrials.gov.[14 26 35]

2.5 The evidence gap, and why it matters

We cannot yet give a full account of what life sciences contributes to the East Midlands economy. Liverpool City Region and Greater Manchester have dedicated cluster governance and published sector evidence to draw on.[28] [29] Here, we still have to piece together figures from several sources, each covering a different geographical area, whenever we make the case for investment or support.

Office for Life Sciences figures identify 511 life sciences companies in the wider East Midlands statistical region, employing 22,413 people and generating £5.8 billion in annual turnover.[1] These show the size of the industry, but cover the full East Midlands ITL1 area, including Lincolnshire and Northamptonshire.

Looking more closely reveals the region's strength in biopharmaceuticals. In 2023/24, it had 147 biopharmaceutical companies, 8,007 jobs and £2.85 billion in turnover. That is 24% more companies than the West Midlands, with almost as many jobs. Earlier detailed figures recorded 50 contract research and manufacturing sites, 39% more than the West Midlands and around 69% more per head of population.[1] [3]

The way the data is collected also makes it harder to see the full picture. Company figures are assigned to registered addresses, which may be elsewhere in the country, rather than to the sites where research or manufacturing takes place. Work carried out at major East Midlands facilities can therefore appear in another region's totals. This is a particular problem here, where many businesses carry out contract research and manufacturing for international clients.

An independent assessment should use a sound methodology and a consistent geographical boundary. It should cover companies, operating sites, direct employment, turnover, GVA, supply-chain activity and the wider economic effects of spending by businesses and their employees. It needs to distinguish registered addresses from substantial regional operations and follow supply chains, investment and business relationships across local authority boundaries. This would give us a reliable baseline for measuring future growth, investment and resilience.

This assessment is linked to the critical supply-chain and sovereign capability mapping proposed under Ask 1, but the two need separate oversight. The economic assessment would be independent and public. The capability map would serve operational needs and may contain sensitive information.

Commissioning the assessment is an immediate priority. Under Ask 2, we are asking Government to help fund it with regional partners, so that future policy and investment decisions rest on reliable evidence.

EAST MIDLANDS AND WEST MIDLANDS COMPARED, 2023/24

Measure	East Midlands	West Midlands	East Midlands as % of West Midlands
Life sciences companies	511	533	96%
Direct employment	22,413	23,765	94%
Annual turnover	£5.8bn	£8.3bn	70%
Biopharmaceutical companies	147	119	124%
Biopharmaceutical employment	8,007	8,204	98%
Biopharmaceutical turnover	£2.85bn	£4.42bn	65%
Primary R&D employment	2,163	1,353	160%

Source: Office for Life Sciences, Bioscience and Health Technology Sector Statistics 2023 to 2024, regional data tables.[1] Figures relate to the East Midlands and West Midlands ITL1 statistical regions.

REGIONAL COORDINATION AND EVIDENCE

Cluster attribute	East Midlands	West Midlands	Liverpool City Region	Greater Manchester
Official cluster identity	Emerging (EMLSC)	Established	Established	Established
Independent economic assessment	Not yet commissioned	Not verified	Sector evidence published	Sector evidence published
Coordinated regional campaign	Emerging (EMLSC)	Established	Established	Established
Dedicated cluster leadership	Emerging (EMLSC)	Established	Established	Established
Government-recognised regional proposition	Developing (EMLSC)	Well established	Well established	Well established

Qualitative comparison prepared by EMLSC from published cluster governance and sector documents.[28] [29]

The East Midlands already has a substantial life sciences industry. Through EMLSC, we are beginning to bring the evidence and partners together so we can make a stronger, shared case for investment.

East Midlands
Life Sciences Cluster

Discovery to manufacture.
One connected region.

East Midlands
Life Sciences Cluster

Structural barriers requiring national partnership

The constraints holding back growth, scale and investment.

03

Structural barriers requiring national partnership

The East Midlands has internationally competitive research, manufacturing and clinical facilities, but some of the barriers to further growth are beyond the control of individual organisations. Addressing them will need regional partners and Government to work together.

3.1 Manufacturing competitiveness, industrialisation and skills

Manufacturing is one of the East Midlands' greatest strengths. It accounted for 14.8% of regional GDP in 2023, compared with a UK average of 9.1%. Only Wales had a higher share.[17] Pharmaceutical development, GMP manufacturing, contract research and development, specialist engineering, MedTech and logistics are all available within the region.

Businesses face growing pressures to remain competitive.

Energy costs are an immediate concern. Life sciences manufacturing uses substantial amounts of energy, and manufacturers consistently report that UK industrial prices compare poorly with locations such as Ireland, Germany and Singapore. High costs make it harder to secure investment here, even where the science, facilities and manufacturing expertise are strong.

Finding experienced staff is another difficulty. The region has six universities, a growing further education network and a strong supply of graduates. Employers nevertheless struggle to recruit laboratory technicians, GMP manufacturing specialists, analytical scientists, quality assurance and regulatory affairs professionals, and experienced mid-level technical staff. The Life Sciences Jobs Plan, published in July 2026, projects around 66,000 additional jobs in priority occupations between 2025 and 2035, alongside the need to replace an estimated 52,000 existing workers. Laboratory technicians rank third for projected additional demand, at around 4,500.[40]

The skills required are changing too. AI-enabled manufacturing, automation, robotics, digital quality systems, advanced analytics and digital regulatory processes are becoming part of everyday production. Technical education needs to prepare people for this work alongside established pharmaceutical and engineering skills.

Responsibility for apprenticeships, adult further education, skills and careers now sits with the Department for Work and Pensions, working through Skills England. The Department for Education retains responsibility for higher education and provision for under-19s. Ask 5 reflects these responsibilities.[32]

Employers are already helping shape a regional response. EMLSC, the East Midlands Institute of Technology and Charnwood Campus are asking which laboratory, technical and operational science roles are hardest to fill, and what demand employers expect over the next three to five years. They are exploring three options: a Level 3 Laboratory Technician apprenticeship, a Level 5 Technician Scientist apprenticeship to support progression, and short specialist courses for existing staff. Ask 5 sets out the support sought from Government.

Modern and responsible manufacturing

Growing manufacturing also means improving how products are made. The region has research teams working on more productive, sustainable and resilient production, close to the businesses that could use their expertise.

The UK SCALE Centre at Loughborough University is the UK member of the MIT Global SCALE Network. It works on supply-chain productivity, sustainability and resilience and is now in strategic collaboration with the Ministry of Defence.

Also at Loughborough, the National Interdisciplinary Centre for the Circular Chemical Economy is working towards chemical production that is independent of fossil resources, climate-positive and circular. This is directly relevant to reducing the environmental footprint of pharmaceutical manufacturing.

De Montfort University contributes expertise in Quality by Design and Quality by Digital Design through its Digital CMC Centre of Excellence in Regulatory Science and Innovation.

There are opportunities to work with nearby facilities outside the region too. The Manufacturing Technology Centre in Coventry and HORIBA MIRA's engineering and testing campus in Nuneaton are both in Warwickshire, within easy working distance of Leicestershire. They offer practical opportunities for collaboration on advanced and responsible manufacturing. This paper recognises them as neighbouring assets.

Supply-chain resilience is equally important. Geopolitical instability, supply disruption and international competition have shown why the UK needs to retain, and where justified restore or establish, production of strategically important pharmaceuticals, diagnostics, advanced therapies, MedTech and enabling technologies. The aim is to understand critical dependencies, provide alternative sources where needed and retain enough domestic

capability to respond when supplies are disrupted. Bringing research, manufacturing, clinical validation, logistics and skills together can help the region contribute to that national effort.[9]

Charnwood Campus demonstrated what a rapid response could look like in 2020, when it hosted one of the national COVID-19 Lighthouse Labs. PerkinElmer operated the laboratory with the Department of Health and Social Care for NHS Test and Trace. It went live on 30 November 2020, with capacity to process up to 50,000 tests a day and around 400 staff.[37] The speed and scale of that response are relevant to future emergency planning.

We now need a clearer picture of what the region could provide today. EMLSC and the UK SCALE Centre at Loughborough University have jointly developed a proposal to map GMP, MedTech, diagnostics and logistics capacity against critical medicines and supply dependencies. The work would start in Leicester, Leicestershire and Rutland and could extend across the East Midlands. Ask 1 sets out the support sought from Government.

Charnwood Campus, BioCity, MTIF and MediCity represent decades of pharmaceutical investment. Alongside them are CROs, CDMOs, pharmaceutical manufacturers, MedTech innovators and businesses taking research into practical use. Closer working between these organisations, education providers and Government would help the region make more of that investment.

3.2 Commercialisation and access to growth capital

The region's universities produce internationally recognised research. Keeping the businesses, jobs and investment that follow depends on the support available when companies are formed and as they grow.

Across the wider Midlands, around twenty universities and nearly 30,000 researchers secured approximately £6 billion in research funding between 2019 and 2024. These institutions have generated more than 350 spinouts, of which over 200 remain independently active. The wider region also has 74 science parks and more than 4,600 hectares of development land available for research and industrial use. Yet Midlands universities have historically received around 1% of UK venture capital investment in university spinouts.[12]

Research prepared for the Forging Ahead launch gives a separate count of 169 Midlands university spinouts founded since 2010, representing 14.5% of the UK total. These figures cover different periods and use different definitions, so they should not be added together.[12] [13]

The gap in funding follows companies through their early years. In their first seven years, Midlands spinouts raised just 15p for every £1 secured by comparable businesses in the Golden Triangle. Nearly 40% were founded outside the Midlands altogether.[13] This makes it harder to retain growing businesses, experienced people and highly skilled jobs.

Later-stage funding is harder to secure still. Across the wider Midlands, only around 5% of university spinouts founded since 2010 are reported to have secured Series A investment, compared with 21% in the Golden Triangle.[44]

Companies are particularly vulnerable between Technology Readiness Levels (TRL) 4 and 7, as they move from research towards practical demonstration. This is often when progress stalls, businesses relocate or they have to seek specialist support elsewhere. They need investors willing to wait for returns, regulatory advice, manufacturing facilities, experienced management and early discussions with the NHS.

Some support is already being developed. Forging Ahead is a five-year, £16 million commercialisation programme, funded through £9.9 million from Research England's Connecting Capability Fund and £6.1 million from universities and regional partners. Led by Loughborough University and coordinated by Midlands Innovation, it involves universities across the Midlands. It is one of the UK's largest higher education commercialisation collaborations, supporting entrepreneurial skills, investment readiness and clearer routes from research to business.[13]

Support also needs to reach businesses formed outside universities. Pharmaceutical, biotechnology, diagnostics, MedTech and rehabilitation technology companies grow from industrial innovation too, including intellectual property developed by CROs and CDMOs.

Acquisition has become a common route to growth. XenoGesis and RenaSci joined Sygnature Discovery, Aurelia Bioscience joined Charnwood Molecular, Reach Separations joined CatSci, and Catalent's Nottingham operation passed to Codis in 2026. These transactions show that buyers value the region's expertise. They also raise a question about where future growth will take place. Without suitable sites, skills and capital, ownership and subsequent expansion can move elsewhere, even where the science began locally.[33]

Companies also need clinical validation, evidence from routine care and a route into NHS use. Health Innovation East Midlands supports this through early evaluation, cost-benefit analysis, service-user insight and adoption roadmaps.[20]

We want businesses to be able to find specialist facilities, experienced operators, manufacturing partners, customers and investors without having to leave the region. Connecting early-stage companies with Charnwood Campus, MTIF, BioCity, East Midlands Freeport and Loughborough University Science and

Enterprise Park would give them more options as they grow. It would also improve the chances of keeping later manufacturing investment in the UK.[7]

Ask 4 proposes a review of 20–30 regional scale-up companies, brought together by EMLSC with the British Business Bank, Innovate UK and UKRI. This would examine why businesses stall, relocate or sell, and whether there is a case for a Scale & Stay pilot.

3.3 NHS integration and innovation adoption

The region has three major research-active NHS trusts, integrated care systems covering the cluster area, Health Innovation East Midlands and the National Rehabilitation Centre. Together, they offer substantial opportunities for companies to work with clinical teams and patients.

Leicester, Leicestershire and Rutland's integrated care system has already set out how it intends to embed research in practice. Its strategy includes research-active primary care, industry partnerships and extending research beyond acute trusts.[35] We need to connect this work more closely with the region's businesses.

The NHS and Academia Collaboration Platform developed through Charnwood Campus is a promising model. It needs further development, reliable funding and closer working across integrated care systems before it can give companies a consistent route to clinical partners, real-world evidence, validation and adoption.

A strong record in clinical trials does not, by itself, mean that the NHS will use the resulting innovations. Research and adoption involve different decision-makers, budgets and evidence requirements. A region can recruit large numbers of trial participants while patients still wait for proven treatments and technologies to become routinely available.

We need agreed routes for evaluation and real-world evidence, followed by clear procurement and commissioning decisions. Proven innovations should be considered across the wider NHS system, with clear responsibility for deciding whether and how to use them. Ask 3 proposes a demonstrator with named partners to work through these steps.

Evidence links closer working between universities, healthcare and industry with faster development, more effective use of research and better patient outcomes.[12] The East Midlands has the organisations and facilities needed to test an approach that could be used elsewhere in the country.

3.4 Governance, coordination and national visibility

For many years, organisations across the East Midlands have promoted their own life sciences expertise. There has been no single partnership responsible for presenting the region's strengths together or coordinating work across the sector.

EMCCA and Leicester, Leicestershire and Rutland partners have both identified life sciences as a priority for growth. The EMLSC campaign is beginning to bring partners together around it.[27] However, the region does not yet have a formal cross-sector life sciences governance structure comparable with those in Liverpool City Region or Greater Manchester.[28] [29]

Evidence suggests that clear cluster leadership, governance and a shared investment offer help regions attract investment, influence policy and support business growth.[12] The interest generated by the campaign gives us an opportunity to agree how companies, universities, NHS organisations, investors and Government can work together over the longer term.

EMLSC is an industry-led coalition, and its governance is still being developed. Establishing a Community Interest Company is one option under consideration. If this proceeds, its directors, funders and conflict-of-interest policy will be published when it is incorporated. Ask 4 seeks recognition of EMLSC as the region's convening partner, without a formal designation or exclusive mandate.

Government needs a way to work with industry-led partnerships whose activities cross local authority boundaries. This should preserve the important roles of EMCCA, LLR partners and other regional institutions.

Government also needs to be able to engage with industry-led partnerships that operate across local authority boundaries, while retaining the important roles of EMCCA, Leicester, Leicestershire and Rutland partners and other regional institutions. Parsons and Turner set out two tests for devolving innovation: that funding should follow the economic and innovation geography of a proposition, and that national research funding and devolved innovation policy keep a clear division of labour, with UKRI funding research excellence and regional partnerships connecting it to industry, skills, adoption, infrastructure and investment.[44]

EMLSC brings an industry-led perspective that runs from manufacturing to adoption, complementing the university commercialisation agenda rather than reproducing it. This would demonstrate how devolution and national innovation policy can reinforce one another, with regional partnerships coordinating investment and delivery across the economic geographies in which businesses and research institutions actually operate.

3.5 The cost of fragmentation

Investment flows towards clusters rather than individual organisations because investors often look for a network of expertise, facilities and partners around a business. The East Midlands has internationally significant strengths in discovery science, clinical research, pharmaceutical manufacturing, MedTech, rehabilitation, logistics and advanced engineering but these can be difficult to find and understand when presented separately by different organisations and places.

This has practical consequences. Businesses can struggle to identify collaborators or find the right support. Partners develop funding proposals independently when a joint bid might be stronger. Government receives several accounts of parts of the region, without a clear view of what they offer together.

Other UK regions have made this easier through dedicated cluster organisations, shared investment proposals, innovation districts and institutional partnerships. These give businesses, investors and Government clearer starting points.

The EMLSC campaign aims to do the same for the East Midlands. By helping partners develop joint programmes, funding bids and investment opportunities, we want to support company growth and more resilient manufacturing. Participating organisations would retain their own identities and independence while working together where there is a shared benefit.

East Midlands
Life Sciences Cluster

Five asks of central government

Practical national actions to release disproportionate regional and national return.

04



East Midlands
Life Sciences Cluster

Discovery to manufacture.
One connected region.

Five asks of central government

We are asking Government to recognise the East Midlands' existing life sciences cluster and help it grow.

Over several decades, the region has built research and clinical expertise, pharmaceutical and MedTech manufacturing, advanced engineering and specialist innovation facilities. We now want to help the organisations behind them work more closely together and make it easier for businesses and investors to find what they need. This would support more discovery, development, manufacturing and NHS use here in the UK, retain more of the value from publicly funded research and reduce reliance on vulnerable supply chains.

Our five asks build on existing government policies, funding and regional strengths. Each proposes specific support to make better use of investment already made, with benefits substantially greater than the support sought.

The UKRI Strategy 2026–2031, the Modern Industrial Strategy and the Life Sciences Sector Plan support this approach. They recognise the importance of regional clusters, advanced manufacturing and the UK's ability to produce essential products. They also call for stronger health resilience and supply chains, better routes to commercialisation and NHS adoption, and growth across the country.[7] [9]
The East Midlands has much of the expertise and infrastructure needed to contribute.

Across all five asks, we want companies to find the support they need to take discoveries into commercial development, grow their businesses and manufacture in the UK. We also want to strengthen the supply chains behind that production and help proven innovations reach NHS patients. This reflects Government's ambition to help innovative companies start, scale and stay in the UK.[7]

For each ask, we explain why it matters now, the first commitment we would like Government to make, what the region will contribute and what could follow in 2027 and 2028.

ASK 01
Manufacturing, industrialisation and sovereign capability

Treat the East Midlands as a priority delivery location for life sciences manufacturing, industrialisation and supply-chain resilience, and give appropriate weight in Life Sciences Innovative Manufacturing Fund assessment to established GMP and MedTech infrastructure, serviced sites, proven delivery capacity and credible opportunities to retain, restore or onshore strategically important production.

Support the development of a regional demonstrator with Loughborough University's UK SCALE Centre to map critical medicines and healthcare supply-chain vulnerabilities, test adaptable manufacturing capability and strengthen national emergency preparedness.

WHO - Office for Life Sciences with the support of Department for Business, Innovation, Science and Trade (BIST); Department of Health and Social Care (including medicines supply and resilience); Innovate UK; East Midlands Freeport; UK SCALE Centre, Loughborough University

WHY NOW - The Life Sciences Sector Plan links manufacturing investment to sovereign capability and health resilience. The region's GMP, MedTech, diagnostics and logistics capacity has never been mapped against critical medicines and supply dependencies. EMLSC and the UK SCALE Centre at Loughborough University have begun exploring how that mapping could be done, starting in Leicester, Leicestershire and Rutland and scalable across the East Midlands. The region has stood up national capacity at speed before, with the Charnwood Lighthouse Lab in 2020 (section 3.1). The Discovery to Manufacture Arc is a functional industrial and innovation geography, not another administrative designation. As Dan Parsons of Loughborough University and Helen Turner of Midlands Innovation put it, "Innovation does not happen neatly within administrative boundaries."[44]

FIRST COMMITMENT SOUGHT - OLS and DHSC (medicines supply and resilience) engage with EMLSC and the UK SCALE Centre on manufacturing investment opportunities, including a Life Sciences Innovative Manufacturing Fund pipeline discussion with regional sites, and on the scope of a proposed critical medicines and healthcare supply-chain resilience demonstrator, including emergency preparedness and adaptable manufacturing capability. Government examines how existing Enterprise Zone, Freeport and Investment Zone designations can support life sciences manufacturing investment.

REGIONAL CONTRIBUTION - The EMLSC manufacturing and scale-up working group brings forward investment-ready projects from regional sites. EMLSC and the UK SCALE Centre, which have jointly developed the mapping proposal, refine its scope with industry partners.

WHAT COULD FOLLOW IN 2027 - Subject to agreement and resources, initial capability and supply-chain mapping begins in Leicester, Leicestershire and Rutland, alongside feasibility work on adaptable manufacturing and emergency preparedness. Any decision on a larger resilience demonstrator would follow the evidence produced. Manufacturing investment remains the primary objective; resilience strengthens the case for it.

NATIONAL OUTCOME - Stronger sovereign manufacturing capability and supply-chain resilience; more UK-based production of medicines, diagnostics and MedTech; globally mobile investment secured; high-value employment created.

REGIONAL DELIVERY - Charnwood Campus, BioCity Nottingham, MTIF, LUSEP and the East Midlands Freeport, coordinated through an EMLSC manufacturing and scale-up working group.

BUILDS ON - Life Sciences Innovative Manufacturing Fund (£520m capital, open to March 2030, minimum £8m project size); Life Sciences Sector Plan; Modern Industrial Strategy.

ASK 02
An independent economic assessment of the cluster

Co-fund, with regional partners, an independent and methodologically robust economic assessment of the East Midlands life sciences cluster, covering companies, operating sites, employment, turnover, GVA, supply-chain activity and induced effects across a consistently defined geography. The assessment must measure activity and value generated at operating sites across the region, rather than relying solely on registered office addresses, which may obscure the East Midlands' true economic contribution.

WHO - Department for Business, Innovation, Science and Trade (BIST), with Office for Life Sciences; East Midlands Combined County Authority; Leicester, Leicestershire and Rutland partners; No.10 North

WHY NOW - Official figures allocate company activity to registered addresses rather than operating sites, so work at East Midlands facilities owned by groups registered elsewhere is counted elsewhere – a systematic understatement for a region built on contract research and manufacturing. Published statistics also use different geographies, and the region has no independent measure of GVA, supply-chain effects or induced employment (section 2.5). The assessment should therefore examine functional supply chains, investment flows and economic relationships across the region, rather than restricting analysis to administrative geography.

FIRST COMMITMENT SOUGHT - BIST and OLS agree in principle to co-fund the assessment with regional partners, and OLS offers methodological engagement and access to operating-site data where it can be shared.

REGIONAL CONTRIBUTION - EMLSC can lead a joint commission with EMCCA and Leicester, Leicestershire and Rutland partners, subject to agreed funding, and publish the results openly.

WHAT COULD FOLLOW IN 2027 - The assessment is commissioned and under way. It runs alongside, but separately from, the supply-chain and sovereign capability mapping proposed under Ask 1: the assessment is public and independent and measures economic contribution, while the map is operational and may need to remain confidential.

NATIONAL OUTCOME - A defensible national evidence base for place-based investment decisions, comparable with the evidence available to Liverpool City Region and Greater Manchester, and a transparent baseline against which future growth can be measured.

REGIONAL DELIVER - Joint commission led by EMLSC with EMCCA, LLR partners, universities and local authorities; published openly.

BUILDS ON - Existing OLS statistical series; EMCCA East Midlands Growth Plan; established cluster assessment methodologies used elsewhere in England.

ASK 03
An East Midlands Innovation Adoption Demonstrator

Establish the East Midlands as an Innovation Adoption Demonstrator: an agreed regional pathway connecting clinical validation, regulatory and commercialisation support, real-world evidence generation, procurement and NHS deployment, with clear entry points for companies, coordinated support at critical development stages and clear decision rights for the NHS.

LEAD - Department of Health and Social Care, with NHS England and DHSC; Health Innovation East Midlands; the region's integrated care boards; NIHR; Office for Life Sciences

WHY NOW - Strong clinical research does not by itself produce NHS adoption (section 3.3). The demonstrator would make the full pathway explicit: innovator, clinical validation, real-world evidence, procurement, NHS adoption and commercial scale-up. EMLSC is already engaging with the Office for Life Sciences on individual innovation cases to identify where funding, clinical development, regulatory requirements and routes to NHS adoption remain disconnected. Integrated care boards are becoming the NHS's strategic commissioners, so the pathway can be designed around the new structure. The 10 Year Health Plan proposed health innovation zones to test and generate evidence on putting innovation into practice. The East Midlands, spanning EMCCA and Leicester, Leicestershire and Rutland, would make a strong health innovation zone, and a regional demonstrator could inform how zones are designed.[41]

FIRST COMMITMENT SOUGHT - DHSC, working with OLS and relevant NHS bodies, names an engagement route and agrees to explore co-design of the demonstrator with Health Innovation East Midlands, integrated care boards, NIHR and EMLSC.

REGIONAL CONTRIBUTION - Health Innovation East Midlands, NHS organisations and Innovate UK lead delivery. EMLSC acts as partner and convenor, bringing forward industry demand and evidence so that policy stays evidence-led. EMLSC will also bring forward practical company cases to identify barriers and test where existing support can be better coordinated. Candidate first themes, to be agreed with partners, are MedTech and diagnostics, and biopharmaceutical innovation from the region's drug-discovery base. Rehabilitation technology is already supported through the National Rehabilitation Centre and the EMERGE programme; the demonstrator would connect to that work rather than duplicate it.

WHAT COULD FOLLOW IN 2027 - Subject to partner commitment and resources, a possible pilot with a small set of regional innovations, testing coordinated routes through clinical validation, commercialisation and NHS adoption. Opportunities to connect this work with the manufacturing and supply-chain programme under Ask 01 would also be explored.

NATIONAL OUTCOM - Faster, more consistent NHS adoption of proven innovation; a replicable national model; better patient outcomes; clearer routes to market for UK companies; more clinical and economic value retained domestically.

REGIONAL DELIVERY - Health Innovation East Midlands working with acute trusts, integrated care boards, NIHR infrastructure, the National Rehabilitation Centre and industry.

BUILDS ON - Health Innovation Network commissioning; NIHR research infrastructure; the NHS Modernisation Bill's strengthening of integrated care boards as strategic commissioners; Life Sciences Sector Plan adoption commitments.

ASK 04
Recognition as the region's convening partnership

Recognise the East Midlands Life Sciences Cluster as the principal regional convening and delivery partnership for life sciences, and engage it as such in policy development, investment discussions and national programmes.

WHO - Office for Life Sciences, with the support of Department for Business, Innovation, Science and Trade (BIST); No.10 North; East Midlands Combined County Authority; LLR partners; British Business Bank; Innovate UK

WHY NOW - The cluster's economy runs across the East Midlands Combined County Authority and Leicester, Leicestershire and Rutland, which do not share a single devolution settlement. Companies, research and manufacturing operate across those boundaries, and national programmes increasingly reach places through devolved structures. A recognised convening partner can work across that functional geography. Recent analysis proposes that funding should follow the economic and innovation geography of a proposition, including collaborations that cross strategic authority boundaries and places without mayoral authorities.[44] The Midlands scale-up investment gap set out in section 3.2 is why a Scale & Stay pilot may be needed.

FIRST COMMITMENT SOUGHT - A named OLS relationship lead and a structured six-monthly review of regional priorities, investment opportunities and progress against the Five Asks.

REGIONAL CONTRIBUTION - EMLSC is an industry-led coalition with committed private funding partners. It convenes companies, universities, NHS organisations, local authorities and investors, and reports each year.

WHAT COULD FOLLOW IN 2027 - Convening delivers a diagnostic of 20–30 regional scale-up companies with the British Business Bank, Innovate UK and UKRI. Its findings could lead, in the second or third year, to a possible Scale & Stay pilot that helps companies start, scale and stay in the UK, subject to partner commitment and funding.

NATIONAL OUTCOME - A single, accountable regional point of engagement for Government and investors; less duplication; stronger regional competitiveness for national and international opportunities.

REGIONAL DELIVERY - EMLSC as an industry-led partnership of companies, universities, NHS organisations, local authorities and investors, with transparent governance and annual public reporting.

BUILDS ON - Existing OLS and BIST cluster engagement; devolution architecture in the East Midlands; comparable arrangements already recognised in other English regions.

ASK 05
An employer-led life sciences skills programme

Support an employer-led East Midlands life sciences skills programme aligned to pharmaceutical manufacturing, MedTech, diagnostics, regulatory science, digital capability and AI-enabled production, expanding apprenticeships, technical qualifications and industry placements against agreed occupational gaps.

WHO - Department for Work and Pensions; Skills England; Department for Education (for under-19 and higher education provision); East Midlands Combined County Authority; regional further education colleges and universities; employers

WHY NOW - The Life Sciences Jobs Plan projects around 66,000 additional jobs in priority occupations nationally between 2025 and 2035, with laboratory technicians third for additional demand.[40] The regional response is being built from employer demand. EMLSC, the East Midlands Institute of Technology and Charnwood Campus are asking employers which laboratory, technical and operational science roles are hardest to fill, and what demand they expect over three to five years. Three routes are being tested: a Level 3 Laboratory Technician apprenticeship; a Level 5 Technician Scientist apprenticeship for progression; and short specialist upskilling of one or two modules over about three to six months. Because employers find it hard to place early-stage apprentices directly in commercial laboratories, a dedicated teaching and training laboratory at Charnwood Campus is being explored for the initial practical element.

FIRST COMMITMENT SOUGHT - Skills England and DWP treat the East Midlands demand exercise as an employer-led pilot for the Life Sciences Jobs Plan; clarify which apprenticeship units and growth and skills funding routes could support short specialist modules; and advise on routes to support a shared training laboratory if demand is validated.

REGIONAL CONTRIBUTION - EMLSC and the East Midlands Institute of Technology publish the number of employers responding and the headline demand by role and level. The findings will inform the proposed apprenticeship pathways, specialist modules and feasibility of a shared training laboratory.

WHAT COULD FOLLOW IN 2027 - A pilot programme is being developed with the East Midlands Institute of Technology and employers, with the aim of a first cohort in September 2027, subject to validated demand, provider capacity and funding. Government support would accelerate it.

NATIONAL OUTCOME - Critical shortages addressed in laboratory, GMP, quality, regulatory and digital manufacturing roles; manufacturing investment de-risked; wider access to life sciences careers.

REGIONAL DELIVERY - EMLSC skills working group with the East Midlands Institute of Technology (EMIOT), employers, colleges, universities and Careers Hubs, working to a published occupational gap analysis.

BUILDS ON - Skills England sectoral skills needs assessments; the apprenticeship and technical education system; existing regional careers and employer engagement programmes.

Conditions for success: devolution and existing designations

Two wider issues affect our sector: how the region works across administrative boundaries, and how existing designations can support further investment.

Devolution. Life sciences businesses work across both the EMCCA area and Leicester, Leicestershire and Rutland. Government confirmed in July 2026 that LLR will move to two unitary councils from April 2028. In August 2026, the area's ten council leaders also asked ministers for a Mayoral Strategic Authority.[38] [39]

EMLSC takes no position on council structures or boundaries. A timely devolution settlement would, however, make it easier to coordinate work across the cluster. As Parsons and Turner put it, "the absence of a strategic authority must not become shorthand for the absence of a strategy."[44]

While those arrangements are being decided, employers in LLR should still be able to access national programmes delivered through mayoral strategic authorities. These include the apprenticeship brokerage pilots in the Life Sciences Jobs Plan.[40] We also ask that any settlement, and the East Midlands Growth Plan, support collaboration on life sciences across administrative boundaries.

Existing designations. Charnwood Campus has been an Enterprise Zone site since April 2017 and was the UK's first Life Sciences Opportunity Zone.[42] Its early years coincided with uncertainty surrounding the UK's withdrawal from the EU, making it harder to attract occupiers and investment. The campus is now attracting manufacturing investment.

East Midlands Freeport tax reliefs run until September 2031,[43] while the East Midlands Investment Zone focuses on advanced manufacturing and clean energy rather than life sciences.

We ask Government to explore a five-year extension of the Enterprise Zone for life sciences with Charnwood Borough Council, LLR partners, EMCCA and the Freeport. We also need clarity on how qualifying life sciences manufacturing and scale-up sites can benefit from Investment Zone and Freeport incentives.

The same principle should apply to any future health innovation zone: its coverage should reflect where businesses and research organisations work together.[44]

Emerging opportunities for national engagement

The emerging High-Potential Innovation Cluster programme and the possibility of a Regional Health Innovation Zone could help us take the Five Asks forward.

A **High-Potential Innovation Cluster** would be particularly relevant to **Ask 1: Manufacturing and sovereign capability, Ask 2: Independent economic assessment, and Ask 4: Recognition and governance**. It could support industrial investment and help businesses scale up, strengthening manufacturing and the region's competitiveness.

A **Regional Health Innovation Zone** would be particularly relevant to **Ask 3: Innovation Adoption Demonstrator**, with support from **Asks 1 and 4**. It could help connect discovery and clinical validation with manufacturing and NHS adoption.

Ask 5: Employer-led technical skills would support both by preparing people for the jobs that growth and innovation will create.

These opportunities are still being explored. EMLSC is working with industry, research, healthcare and public-sector partners to understand whether they can help deliver the Five Asks.

The ask in one sentence

Give the East Midlands the same policy backing as other leading UK life sciences regions so we can manufacture more here, strengthen supply chains, help businesses bring products to market and into NHS use, and deliver a measurable return on the investment already made.

DISCOVER | DEVELOP | VALIDATE | SCALE | MANUFACTURE | MOVE & SUPPLY | ADOPT

East Midlands
Life Sciences Cluster

What the sector commits in return

A funded regional offer, with a phased and measurable delivery programme

05

What the sector commits in return

This Position Paper is an offer of partnership. The East Midlands Life Sciences Cluster campaign will match national support with practical regional delivery.

The first phase establishes the foundations of a more connected, visible and investable cluster. These commitments are achievable, largely within the control of the campaign and its partners, industry-led and supported by private funding partners, and capable of being measured within twelve months. The second phase builds on that foundation through a White Paper, deeper economic analysis and more developed propositions on investment, commercialisation, manufacturing, skills and innovation adoption.



Phase 1: deliverable within twelve months, led by industry

Commitment	What the campaign will deliver	Intended outcome	Delivery route
1. Launch the cluster	Officially launch the EMLSC campaign, publish this Position Paper and establish a clear public identity, website	A recognised regional platform through which industry, Government, investors and partners can engage with East Midlands life sciences.	Existing EMLSC campaign programme, founding partners and the biennial Summit.
2. Build the coalition	Bring universities, NHS organisations, industry, local authorities, business support organisations and investors behind a shared proposition, with focused working groups on manufacturing and scale-up, investment, skills, and research and adoption, each agreeing a twelve-month delivery plan. Manufacturing and scale-up, investment and skills groups are taking shape; a research and adoption group depends on the capacity of NHS, NIHR, Health Innovation East Midlands and National Rehabilitation Centre partners.	Better coordination, less duplication and a clear point of contact for Government, investors and regional partners.	EMLSC coalition-building programme, Summit relationships and campaign roundtables.
3. Create a single regional narrative and asset map	Finalise a shared evidence base, common messages, a fully cited evidence register and a regional asset map covering discovery, translation, clinical research, manufacturing, rehabilitation, investment and innovation infrastructure, with every figure labelled with the geography of its source.	A consistent and credible account of the region's capabilities for partners, MPs and inward investment teams to use nationally and internationally.	Position Paper, campaign website, communications toolkit and partner briefings.

Commitment	What the campaign will deliver	Intended outcome	Delivery route
4. Publish an investment prospectus	Produce an investor-facing prospectus presenting the region's research, clinical, manufacturing and commercial assets, available sites, scale-up infrastructure and priority investment opportunities.	A single practical route into the region for BIST, the British Business Bank, investors and international companies.	Regional asset information, Charnwood Campus investment work, partner contributions.
5. Activate the regional coalition	Deliver a year-round programme of stakeholder meetings, policy briefings, roundtables, media activity, digital communications and the East Midlands Life Sciences Summit.	Greater national visibility, stronger relationships across the region and more opportunities for joint projects and funding bids.	EMLSC communications programme, annual Summit and partner networks.
6. Map company creation, finance and scale-up support	Publish an initial guide to regional commercialisation programmes, accelerators, university spinout support, investor networks, scale-up facilities and specialist advisers.	A support offer that founders, SMEs and investors can actually navigate, and a clear view of the gaps requiring action in Phase 2.	Forging Ahead, university commercialisation programmes, investor-readiness initiatives.
7. Support the talent and careers narrative	Bring together existing information on life sciences career pathways, apprenticeships, placements and employer-led initiatives, and promote it through campaign channels and stakeholder events.	Better awareness of regional career opportunities and the foundation for a formal skills proposition.	Careers Hubs, universities, colleges, employers and existing inclusion programmes.
8. Report progress publicly	Publish a short annual campaign report setting out activity delivered, partners engaged, policy progress, investment opportunities developed and priorities for the following year.	Demonstrable accountability, sustained partner confidence and evidence of momentum for Government and investors.	Campaign KPI framework and annual EMLSC Summit review.

Phase 2: building the White Paper and the investment proposition

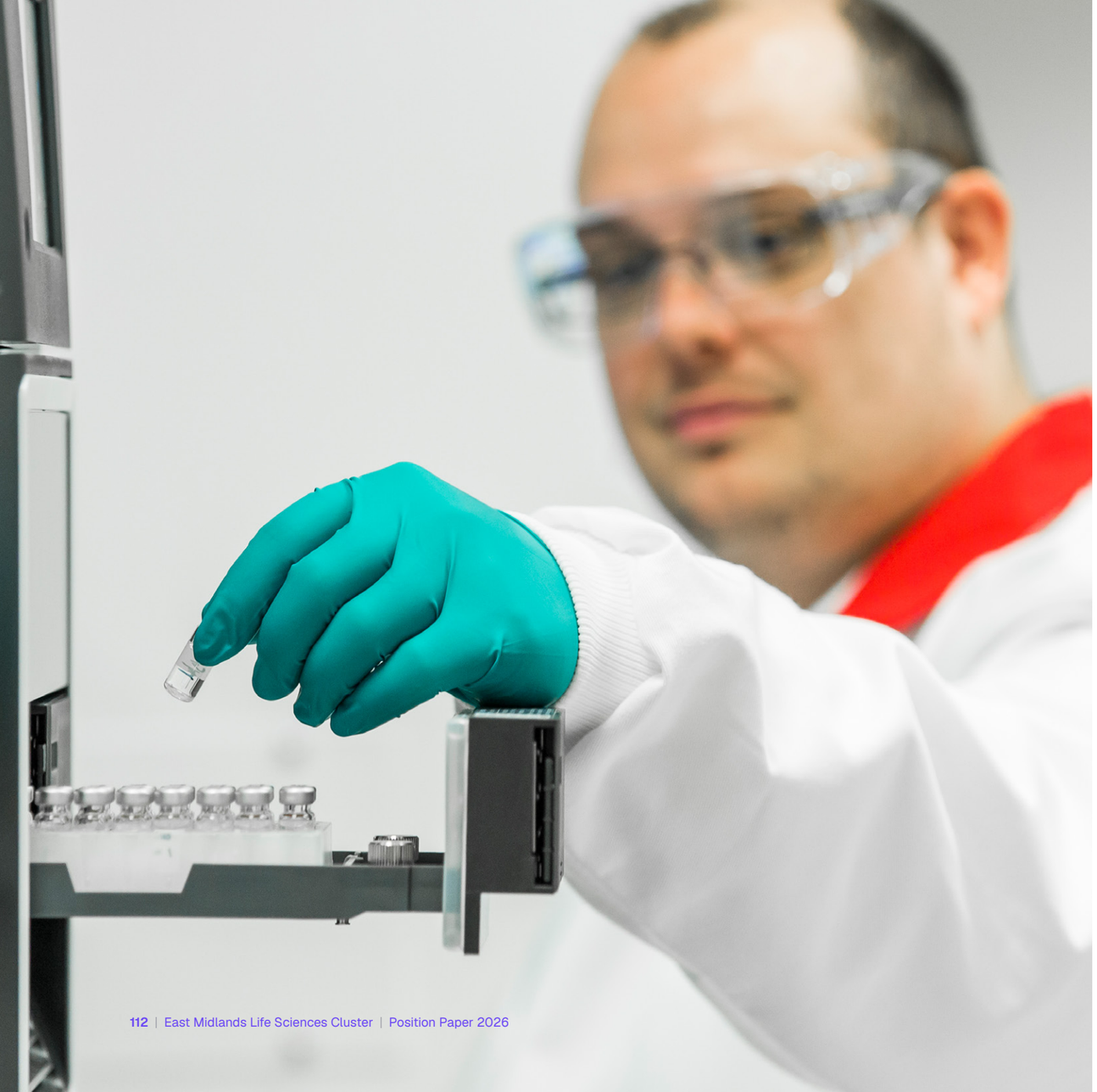
Phase 2 begins once the campaign platform, coalition and initial evidence base are established. Delivery is subject to partner agreement, funding and the findings of the first year's work.

Commitment	What the campaign and its partners will develop	Intended outcome	Delivery route
1. Publish an East Midlands Life Sciences White Paper	Help develop a fuller evidence-led strategy setting out long-term priorities, sector opportunities, delivery model and investment requirements.	A move from regional positioning to an agreed long-term programme for growth, investment and policy engagement.	Phase 1 Position Paper, working groups, stakeholder evidence and national engagement.
2. Commission an independent economic impact assessment	Subject to agreed funding, work with Government, EMCCA, LLR partners and regional organisations to establish a rigorous baseline covering companies, operating sites, employment, turnover, GVA, supply-chain activity and wider economic effects. The analysis should follow functional supply chains, investment flows and economic relationships, not only administrative boundaries.	A defensible evidence base comparable with those used by Liverpool, Greater Manchester and other established clusters.	Joint commission involving EMLSC, EMCCA, LLR, Government, universities and local authorities.
3. Develop a manufacturing, scale-up and supply-chain resilience roadmap	Identify priority manufacturing capabilities, critical dependencies, infrastructure gaps, scale-up requirements, investment opportunities and workforce needs across biopharma, MedTech, diagnostics and enabling technologies, including practical opportunities to retain, restore or onshore strategically important activity. The first step is critical supply-chain and sovereign capability mapping, starting in Leicester, Leicestershire and Rutland.	Regional manufacturing strength converted into an investable programme that attracts public and private capital and supports UK health resilience.	EMLSC and the UK SCALE Centre at Loughborough University (joint mapping proposal), the EMLSC manufacturing working group, Charnwood Campus, industry partners and the East Midlands Freeport.

Commitment	What the campaign will deliver	Intended outcome	Delivery route
4. Produce a company creation and growth prospectus	Prepare a regional proposition covering venture creation, spinouts, CRO and CDMO-generated IP, accelerator programmes, patient capital, leadership support and physical scale-up environments. This includes a diagnostic of 20–30 regional scale-up companies that could lead to a Scale & Stay pilot.	A clearer regional route for founders, investors and national partners from discovery and company formation through to scale-up and industrial execution.	Forging Ahead, Midlands Innovation, UKRI, universities, investors and scale-up assets.
5. Agree an innovation adoption proposition	Work with Health Innovation East Midlands, NHS organisations, integrated care boards, NIHR and industry to agree a practical regional pathway for evaluation, real-world evidence, clinical validation and adoption.	Less time between innovation and deployment, better support for regional companies and improved NHS and patient outcomes.	Health Innovation East Midlands, NIHR infrastructure, NHS trusts, ICB partners and industry.
6. Develop an employer-led skills programme	Agree priority occupational gaps, expand employer involvement in apprenticeships, technical training and placements, and identify opportunities for shared industry facilities or programmes. A pilot programme is being developed with the East Midlands Institute of Technology, aiming for a first cohort in September 2027, subject to validated demand, provider capacity and funding.	Shortages addressed in laboratory, GMP, quality, regulatory, digital manufacturing and mid-level technical roles, with wider access to life sciences careers.	East Midlands Institute of Technology, Skills England, DWP, universities, FE colleges, Careers Hubs and employers.
7. Create a coordinated international landing offer	Develop a clear offer for companies seeking a UK base, including relationship management, site identification, access to research and clinical partners, manufacturing support and investor introductions.	An East Midlands that is easier for international companies to understand, enter and invest in.	BIST inward investment teams, EMCCA, local authorities, Freeport, Charnwood Campus, MTIF, BioCity and partner sites.
8. Develop a regional investment case and delivery programme	Convert the strongest White Paper recommendations into costed and investable propositions, identifying delivery partners, funding mechanisms and measurable outcomes.	A pipeline of programmes capable of securing national funding, private investment and long-term regional commitment.	Government funding programmes, UKRI, Innovate UK, OLS, BIST, British Business Bank and private investors.

The first twelve months cover work the campaign can lead and deliver itself. Phase 2 depends on partnership, and priorities within it will be refined with partners to reflect emerging opportunities, available resources and Government priorities. Together the two phases provide a route from a collection of individual strengths to a nationally recognised, internationally competitive life sciences cluster and they show that the region is prepared to provide the leadership, coordination and sustained commitment needed to maximise the return on public and private investment.





East Midlands
Life Sciences Cluster

Conclusion: a national opportunity

From regional strength to national impact.

06

Conclusion: a national opportunity

The recommendations in this paper are deliberately practical. They build on existing Government policy, established regional capability and proven ways of delivering. The East Midlands already has a life sciences cluster that the Government can build on.

The opportunity extends beyond life sciences. By connecting regional research strengths with manufacturing, skills, investment and public service innovation, the East Midlands can provide a practical demonstration of how place-based industrial policy delivers national growth. Success would strengthen the UK's economic security, create skilled jobs and offer lessons for other regional innovation ecosystems looking to turn research excellence into lasting economic value.

Few UK regions combine research excellence, translational science, clinical capability, advanced manufacturing, commercial expertise and innovation infrastructure inside a single well-connected geography. Much of the capital investment has already been made. The institutions are established. The industrial capability is proven and the partnerships are forming. Relatively modest policy interventions now have the potential to deliver substantial economic, health and societal benefits.

Without stronger regional coordination and targeted national support, the region will continue to perform below its capability. Investment will keep flowing towards more established clusters. Innovative companies will look elsewhere as they scale. The UK risks losing intellectual property and manufacturing opportunities to international competitors while remaining dependent on overseas suppliers for critical goods. It would miss the chance to make the most of decades of investment in research, infrastructure and industrial capability.

The EMLSC campaign represents the region's commitment to changing that trajectory. Government is being asked to partner with a region that has already demonstrated its willingness to lead, collaborate and organise around a shared vision for growth.

Back the East Midlands with the same strategic intent shown to the UK's other leading life sciences regions, and in return the region will deliver stronger sovereign manufacturing capability and supply-chain resilience, faster commercialisation, increased private investment, better innovation adoption, improved health outcomes and sustained economic growth.





East Midlands
Life Sciences Cluster

From Postion Paper to delivery

Turning the proposition into coordinated action.

07

From Position Paper to delivery

This Position Paper brings together the evidence we have gathered and the case for a more connected East Midlands life sciences sector. With its publication, the work moves into a new phase. We will use that shared evidence to bring partners together, develop investment proposals and set out what we want to achieve and how we will measure progress.

THE STRATEGIC ARCHITECTURE

01 Regional evidence and stakeholder engagement

02 Position Paper

03 East Midlands Life Sciences Cluster campaign

04 Priority programmes in scale-up, manufacturing, adoption, skills and investment

05 Regional roadmap and White Paper

06 Investable propositions and delivery partnerships

The campaign's immediate priorities are to bring organisations across the region together, help more East Midlands companies bring their products to market and scale up, and attract the investment and infrastructure they need to grow. We will also work to make regional manufacturing competitive and resilient, help innovations get into use sooner, develop the skills the sector will need, and raise the region's profile in the UK and internationally.

The region is well placed to contribute to the UKRI 2026–2031 mission because it combines research capability with industrial assets, clinical infrastructure and commercially viable locations for growth. Making the most of that opportunity will take sustained work across the region. We need to focus on programmes that can attract investment and set clear goals so we can track what that investment delivers.

Acknowledgements

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Thank you to Boots for helping us refine the chapter on its role in medicines discovery and healthcare innovation in the East Midlands, and for giving us access to historical images from the Boots Archives.

The paper draws on discussions at the East Midlands Life Sciences Autumn Summit 2025, the Spring Summit 2026 and three regional industry roundtables, as well as engagement with more than 125 private and public sector organisations. Thank you to everyone who took the time to share what they know from their own work and help us test the proposals. Their contributions helped shape this shared industry proposition for the future of life sciences in the East Midlands.

The East Midlands Life Sciences Cluster campaign is led by industry and supported by private funding partners. It brings together universities, NHS organisations, local authorities, investors and national partners. We are grateful to Charnwood Campus Science, Innovation and Technology Park for supporting the campaign and to our funding partners, RandalSun Capital, Kindeva Drug Delivery Systems, Datalink Electronics and Marks & Clerk. Together, these contributions have helped shape a collective industry proposition for the future of life sciences in the East Midlands.

Acknowledgement recognises contributions to the paper's development and does not imply institutional endorsement.



Appendices

	Title	Content
Appendix 1	EMLSC Key Regional Partners and Strategic Assets	A directory of the principal organisations, networks and specialist assets that make up the regional sector.
Appendix 2	EMLSC Clinical Research Evidence	Comparable national recruitment data, population and infrastructure evidence, international sponsor activity and evidence qualifications for the clinical research proposition.
Appendix 3	EMLSC Key Regional Asset Map	The named physical asset record, located by hub across Leicestershire, Nottinghamshire, Derbyshire and Stanford Hall, with regional and distributed assets listed separately.
Appendix 4	EMLSC East Midlands Medicines and Health Tech Innovation Databank	The regional record of medicines and healthcare innovations, with attribution, status and sources for each entry, including withdrawn and unmarketed compounds.
Appendix 5	EMLSC Drug Discovery Evidence Report	The evidence base for the closure, recovery and restructuring account, including the OLS site-based series, contract research and manufacturing density analysis and company lineage evidence.

Comments on data, geography and departmental names

Statistical sources. Headline sector figures are taken from the Office for Life Sciences Bioscience and Health Technology Sector Statistics. Current scale uses the 2023 to 2024 release, published in October 2025, which allocates company metrics to registered addresses. Historical change uses the 2021 to 2022 release, which counts employment and turnover at operating sites. The two series use different methodologies and are not joined into a continuous trend anywhere in this paper.[1 3]

A later release. The Office for Life Sciences published Bioscience and Health Technology Sector Statistics 2024 to 2025 on 17 September 2026, introducing a revised methodology and revised estimates for 2023/24.2 This paper has not revised its figures. It uses the 2023/24 figures as originally published in October 2025, which are the campaign's established evidence base and are consistent with the EMLSC website, and it does not mix the two series.

Geography. The East Midlands Life Sciences Cluster campaign covers Leicester, Leicestershire and Rutland and the East Midlands Combined County Authority area. The sources used in this paper describe the sector across different geographies: Office for Life Sciences figures relate to the East Midlands ITL1 statistical region, covering Derbyshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire and Rutland; NIHR figures use the NIHR East Midlands research delivery geography; and Midlands Innovation figures cover the wider Midlands. This reflects the way the sector works across administrative boundaries. Each figure is labelled with the geography it describes and should be read on that basis.

Calculations. Where percentages, ratios and density measures have been calculated specifically for this paper, rather than taken directly from published sources, this is identified in the accompanying source notes. Site density per million residents uses ONS mid-2023 population estimates as the denominator and the OLS 2021/22 site dataset as the numerator. Displayed values are rounded.

East Midlands
Life Sciences Cluster

Case Study

EMLS Historical Discoveries



Microbiological assay of penicillin, 1950 — WBA/BT/B/46/23.

EMLS Historical Discoveries

Boots, Nottingham: roots in 1849, a century of pharmaceutical discovery and manufacture

Boots' contribution to the East Midlands' healthcare heritage began in **1849**, when John Boot opened a herbalist shop at 6 Goose Gate, Nottingham, offering affordable remedies to the city's industrial workers. Under his son Jesse Boot, the business expanded into a pharmacy and manufacturing enterprise, establishing the foundations for its later contribution to pharmaceutical discovery and production.

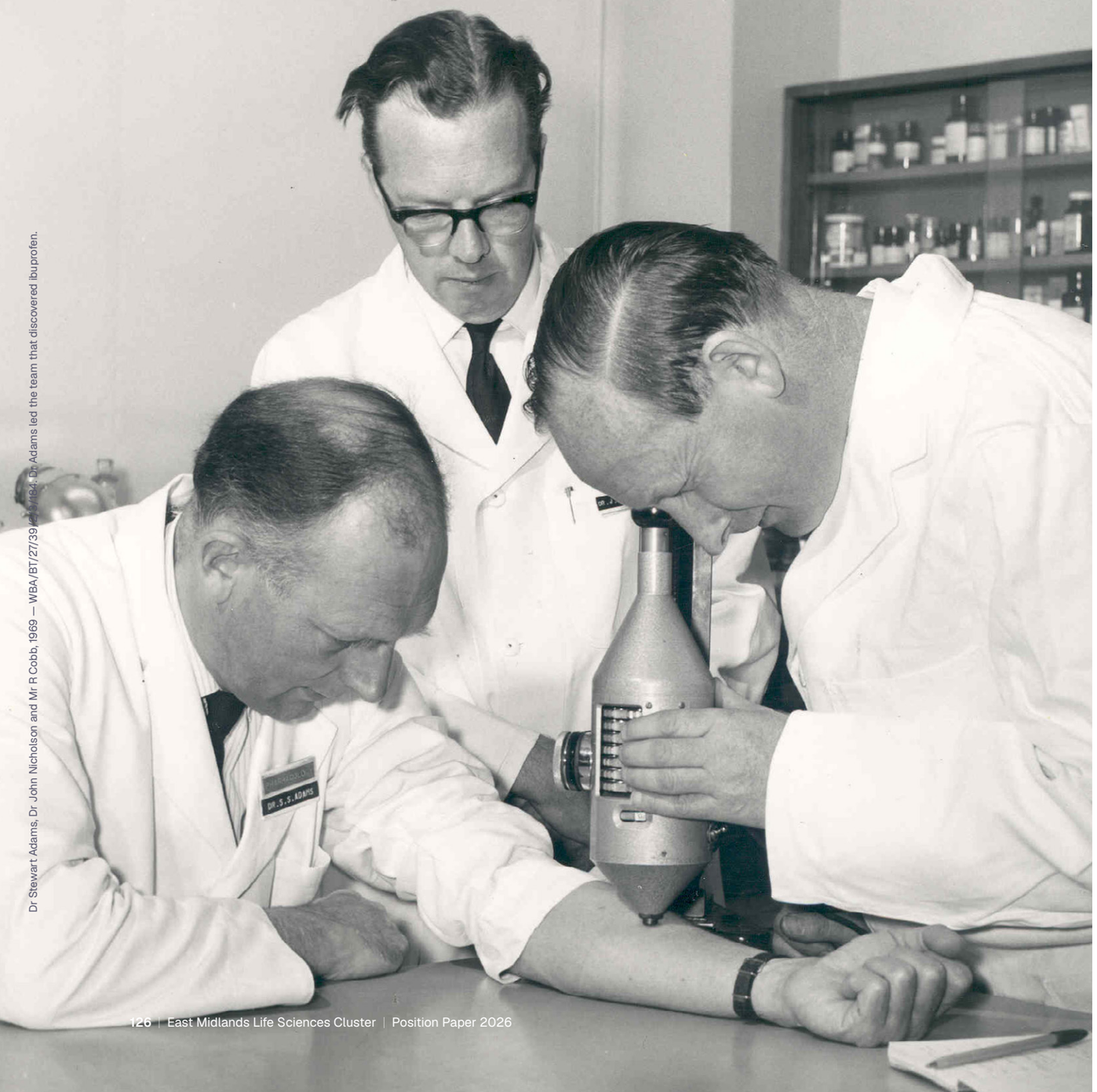
From developing manufacturing techniques for essential medicines to discovering ibuprofen, its history demonstrates the region's ability to connect scientific expertise with the practical work of bringing medicines to patients.

Boots' manufacturing activities were established before the First World War: in **1888, Boots Pure Drug Company was incorporated to manufacture pharmaceuticals**, with a manufacturing site at Island Street in central Nottingham. During the First World War, when Britain lost access to key pharmaceuticals supplied by Germany, the company expanded into the research and scientific manufacture of essential synthetic chemicals, including aspirin. This marked a significant development in its sustained contribution to pharmaceutical development and production.

Over the following decades, Boots helped make major medical advances available to the public by developing manufacturing techniques for insulin in 1923, penicillin in 1944 and cortisone in the early 1950s. These milestones illustrate the importance of manufacturing expertise in translating scientific discoveries into accessible treatments.

The discovery of ibuprofen by Boots scientists became a defining achievement in this history. Dr Stewart Adams led the discovery team, working with colleagues including Dr John Nicholson, whose work secured Nottingham's place in the story of pharmaceutical innovation. Following a research programme that began in 1953, Boots launched ibuprofen as the prescription medicine Brufen in February 1969. Royal Society of Chemistry Chemical Landmark plaques at BioCity Nottingham and the Boots site in Beeston commemorate the research and development behind that contribution.

Together, these achievements provide a historical foundation for the East Midlands' **Discovery to Manufacture** proposition. Boots' experience shows how research, process



Dr Stewart Adams, Dr John Nicholson and Mr R Cobb, 1969 — WBA/BT/27/39 (detail). Dr Adams led the team that discovered ibuprofen.

development and pharmaceutical production can combine within a region to turn scientific advances into medicines for public use.

An archive that supports further research

Boots also preserves this history as a resource for future scholarship. Its extensive archive is available to the public for research into the history of medicine and healthcare, subject to access conditions for individual records. A substantial Wellcome award supported a six-year project to catalogue the collection and make it discoverable through an online catalogue, extending access for academic researchers and the wider public.

Boots' contribution to research continues today through its Life Sciences and Clinical Trials team, which supports participant recruitment and research delivery through community pharmacies. This adds a contemporary chapter to its historical role: bringing research closer to the people who may benefit from it.

Source: historical information, photographs supplied by the Boots Archivists, October 2026; contemporary research information supplied by Boots' Life Sciences and Clinical Trials team.



Boots insulin laboratory, Nottingham, c.1930s — WBA/BT/8/47/1.



Manufacture of cortisone, c.1952 — WBA/BT/10/46/33.

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