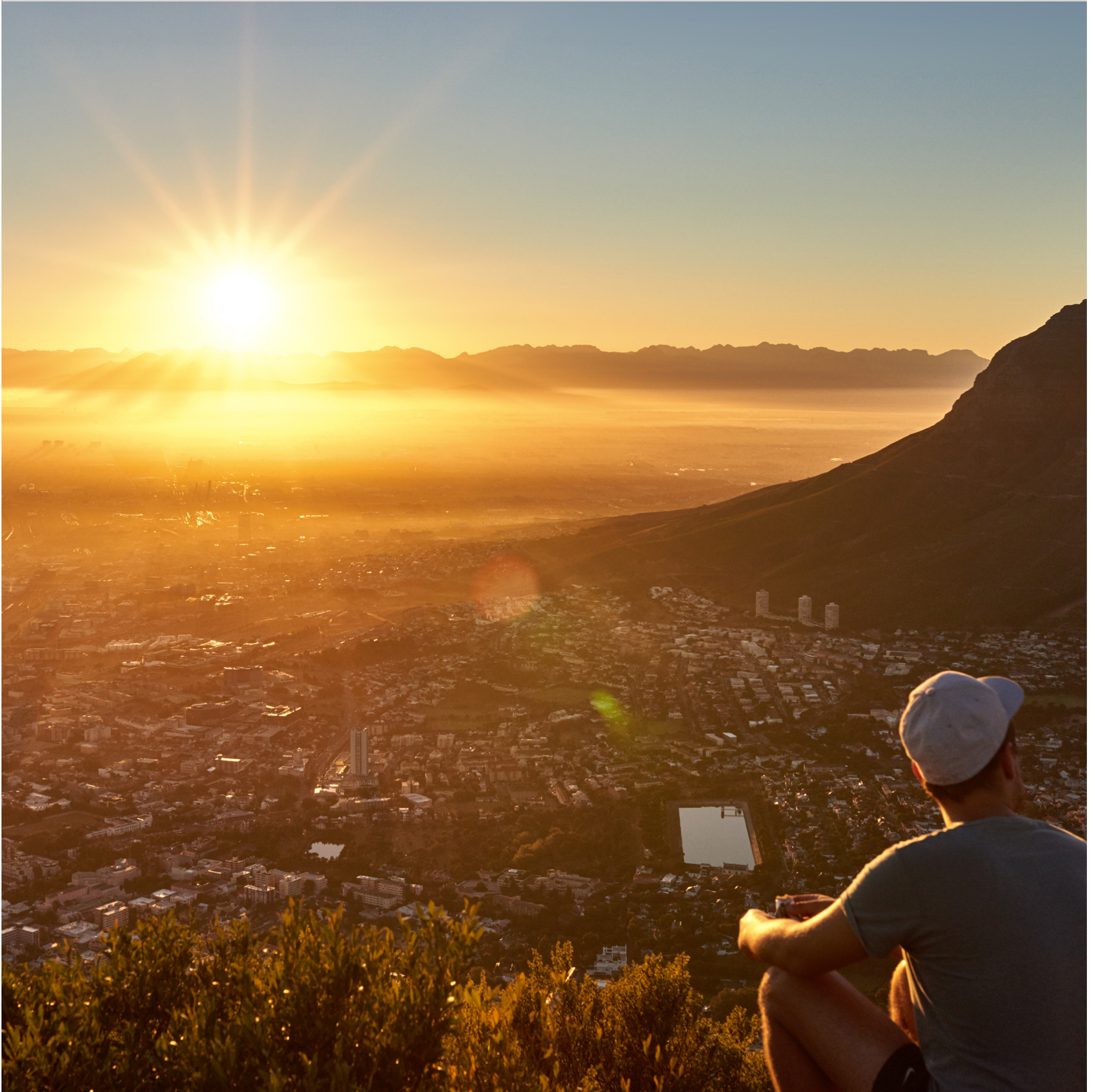


World Research - December 2020


REPORT
Savills Research

Tech Cities

Tech City Tiers



Foreword

In an industry where people are the most important resource, Savills Tech Cities has always been about what that tech talent is looking for in a place to live and work.

That talent had, in recent years, overwhelmingly favoured some of the world's most vibrant cities. San Francisco, Austin, Berlin and Tel Aviv, among others, achieved global statuses that belied their size as a result. Tech companies emerged from, developed in and moved to such cities, often at the expense of less attractive cities, suburban and business park locations. Bustling urban environments rich with café culture, nightlife and the arts were all part of the appeal.

But the pandemic has led to a reassessment by some about what makes a good place to be. Wellness matters more than ever. A city's access to open space, cycle networks and clean air has risen in importance.

We had already been observing a shift away from some of the major urban centres in favour of smaller ones. Cost of living for talent, in addition to rising office rents, was a big factor in this.

Now health and wellness is becoming an even greater factor in location decisions. Cities, big and small, will remain essential to the tech sector as places to cluster and share ideas, scale and grow. However, in this edition of Tech Cities, we look at the different 'tiers' of a tech city and what makes them important to the sector. The pandemic has been a catalyst for change, and we expect to see cities of all sizes respond to the challenge.

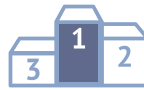
Summary



■ Savills Tech Cities are important centres for tech in their region and venture capital (VC) investment hotspots. Vibrant cities in which to live and work, they are magnets for talent.



■ Wellness matters more than ever to both tech talent and business occupiers. Our Tech Lifestyle Cities have an edge here, with better air quality, access to greenspace and smaller footprints. Savills Digital Nomad Essentials Index highlights some of the factors that count to talent today.



■ In spite of 2020's upheavals, the Tech Megacities continue to dominate VC investment, led by Beijing and San Francisco. Singapore has received a boost, benefiting in part from the US-China trade war.



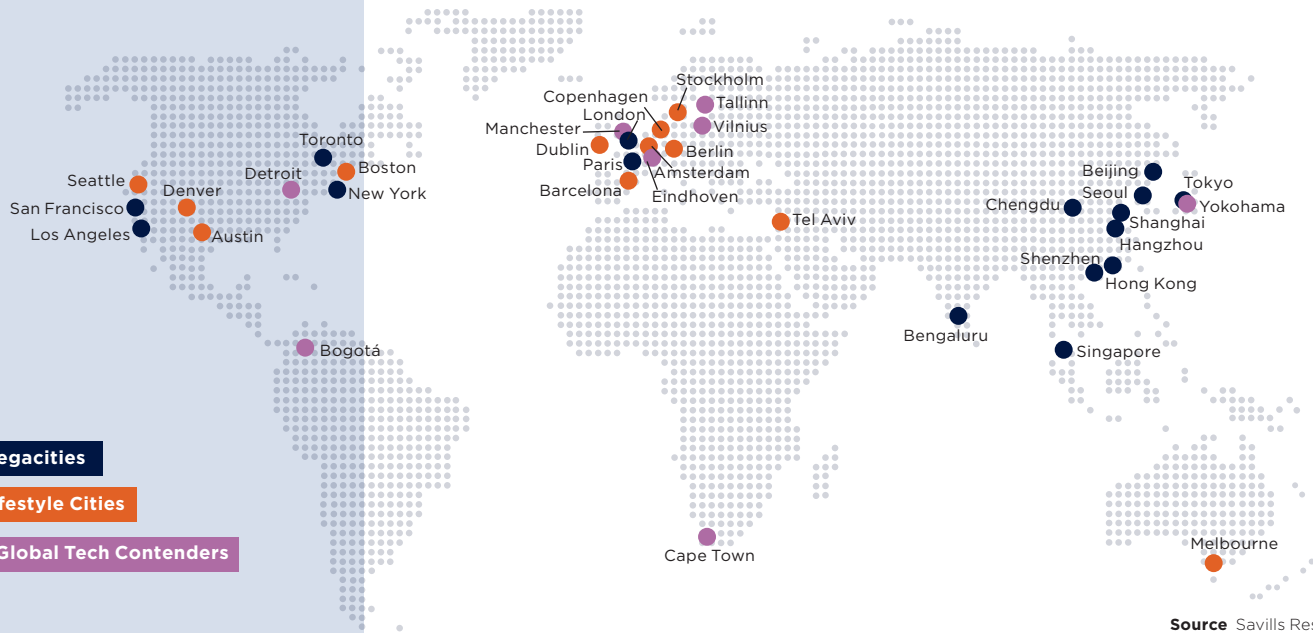
■ A new raft of Rising Global Tech Contender cities are emerging, ranging from Detroit to Yokohama. Growth is fuelled by technological advances, government initiatives and cost advantages.



■ While many tech companies have adopted work from home strategies in the wake of the pandemic, their city centre offices and campuses, in which they have invested heavily, will remain important as places for staff to collaborate, to instil company culture, and to attract the best and brightest.



■ Out of town tech campuses have taken on a fresh relevance in a time of social distancing and newfound focus on health and wellbeing. We explore five examples with wellness at their core.



Source Savills Research



City living on a small footprint allows easier access to amenities and a better work/life balance

Getting the essentials right

The top functioning tech cities succeed in offering a set of fundamental benefits for the coding classes

The flat white has long been considered the essential caffeinated beverage by many a young, hip urbanista. The vegan burger is rapidly obtaining the same status when it comes to food; a healthier alternative to a traditional burger with a lower environmental footprint to boot.

The presence of cafés that do these things well can be a barometer of a city’s functioning as a tech city. Cafés serve as a place for meetings, chance encounters and networking. They are important to everyone from the lone start-up entrepreneur through to the venture capitalist.

Add to that other essentials for the coding classes: a MacBook, fast broadband, flex office space, a clean and healthy environment, as well as some classic trainers and premium, wireless headphones, and you have the Savills Digital Nomad Essentials Index. This index can be used to identify the locations that may be most desirable to tech talent and therefore the occupiers looking to recruit such employees.

Seven of the top ten cities in this index are what we class as Tech Lifestyle Cities or Rising Tech Global Contenders (see p.7 and 8). It is no coincidence that these are smaller cities by global standards. City living on a small footprint allows easier access to amenities and a better work/life balance, usually coupled with lower cost of living, but with all the ‘buzz’ of larger urban centres. The fact that these locations have better air quality only underscores their appeal in today’s world.

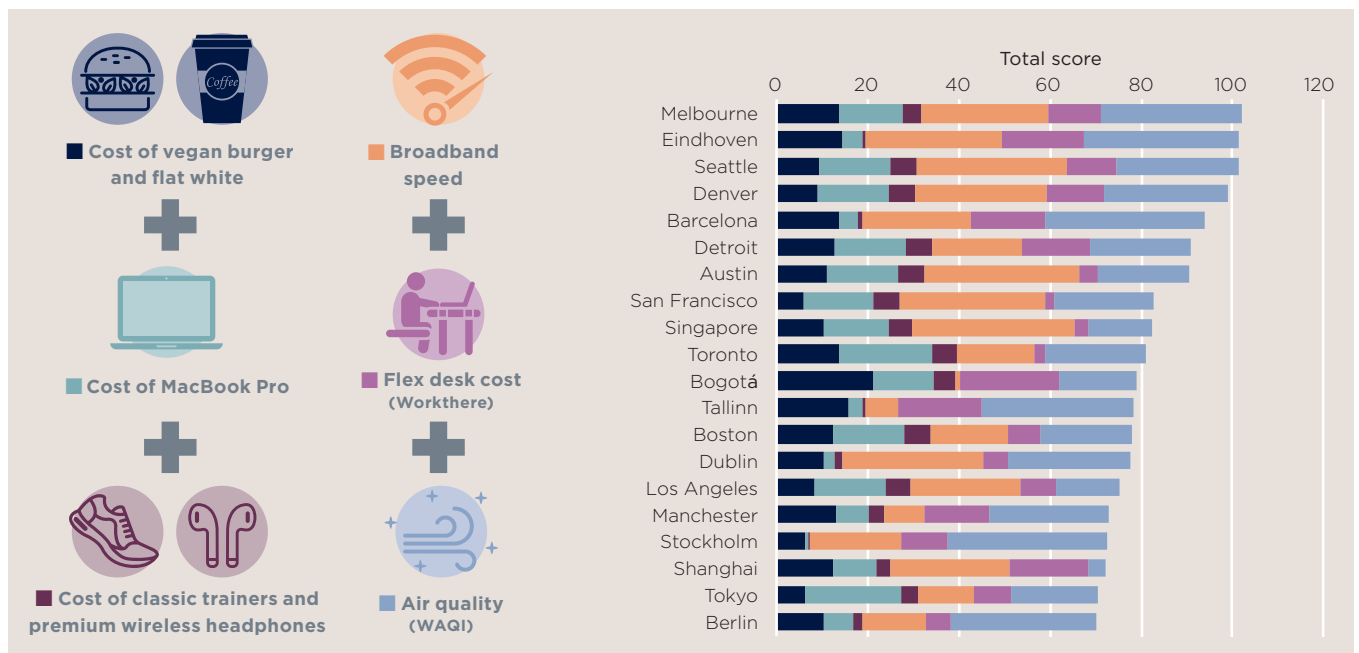
Melbourne tops this index, a city located in the country that claims to have invented the flat white (although Kiwis may argue otherwise). This healthy city also offers access to plenty of outdoor pursuits, coupled with good tech infrastructure. Eindhoven, second, is one of our Rising Global Tech Contenders. The Hovenring, the world’s first floating cycle suspension bridge, sets the tone for the city’s environmental credentials. Costs are lower than its northern neighbours, particularly for flexible office space.

Lower-cost cities make an impact here. Established tech centres face rising cost pressures. Detroit, Bogota, Tallinn and Manchester are, among others, all earlier on the curve as tech hubs and still retain a significant cost advantage.

What is ‘tech’ today?

In an era where every industry is ‘tech’ to some degree, all cities across the globe are being touched by the trends that shape it. Here we focus on the hubs of software and the online world. Online business has proved particularly disruptive to the global hierarchy of cities. Untethered to traditional drivers of the industry, anyone with an idea, a laptop and an internet connection has the capability to create businesses worth multimillions. In Savills Tech Cities we identify the locations these individuals want to be.

The Savills Digital Nomad Essentials Index, Top 20



Note: Higher weighting given to broadband speed and air quality

Source Savills Research, Workthere, WAQI



Big capital injections usually precede investment in people and places

Go with the flow

Tech cities thrive on venture capital investment. So, where in the world is the money going?

Venture capital (VC) investment is a key lead indicator of the destinations that matter for tech. Big capital injections usually precede investment in people and places, so identifying the places it is flowing to tells us which markets to watch.

Sand Hill Road: the Wall Street of Tech

Sand Hill Road, located at the heart of Silicon Valley is the global epicentre of VC. Established in the 1970s, it has been the source of early funding of some of the biggest names in Western tech. Silicon Valley, San Francisco and the wider Bay Area emerged to become one of the most important global tech hubs as a result.

But as other global centres of VC funding have emerged, global tech hubs have multiplied. A decade ago 73% of all global VC was invested in the United States (based on analysis of top destinations). Last year, with the overall market vastly expanded, the US global share stood at 46%.

The rise of China

For every US tech giant there is a Chinese equivalent. The US has 'FAANG' (Facebook, Amazon, Apple, Netflix, Google). China has 'BAT' (Baidu, Alibaba, Tencent) and now 'TMD' (Tuotiao (Bytedance), Meituan Dianping, Didi). These home-grown tech giants have propelled China into a dominant tech force. China accounted for 21% of all global VC funding in 2019, up from 5% a decade ago. Beijing was the biggest recipient of that, capturing \$83 billion of VC investment in the last

three years (to Sep 2020), the largest volume globally over the period. Close to regulators, some of China's largest tech firms are headquartered in Beijing. The growth of China as a major tech player has significant implications for property demand beyond China. Tech occupier demand in the West has been driven by Amazon and major national players. We are already starting to see a whole new wave of demand from the big Asian players heading West.

Silicon Valley vs San Francisco

Taken as a whole, the San Francisco Bay area still dominates global funding, but analysis of its components reveals some interesting trends.

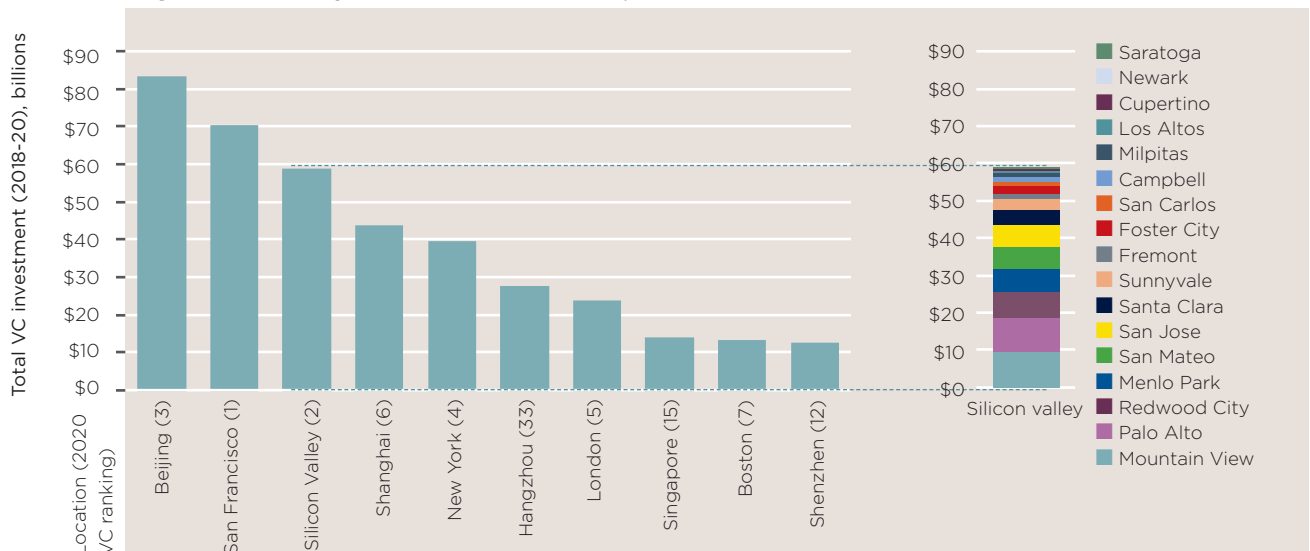
A decade ago Silicon Valley received more investment than its northern neighbour, but San Francisco has since outperformed it as talent and companies flocked to the vibrant City by the Bay. VC investment into the city of San Francisco exceeded \$70 billion over the last three years. Volumes have surpassed those of Beijing both this year and last.

Silicon Valley, meanwhile, saw \$59 billion of investment between 2018 and 2020. Comprised of 18 individual towns and cities (see chart) in the Santa Clara Valley, Silicon Valley is home to Apple, Facebook and Google, and remains the hub for big tech. Changing trends in living and working, accelerated by the pandemic, are bringing new relevance to its suburban campuses, as explored on p.11.

London calling

The rest of the VC top 10 is dominated by the US and China, with one exception: London. The UK capital stands 7th with some \$24 billion invested in the last three years, and 5th in 2020 (to September). London's development as a VC hub was a natural progression for this global financial centre. This funding environment has helped to cement its position as Europe's premier tech city.

Top locations by total VC investment, 2018-20



Source: Savills Research using PitchBook



Amazon HQ, Seattle

The pandemic and property

As the pandemic recedes, city-based, high-tech workplaces will look to reassert their importance

Across all our Tech Cities, tech companies had been prolific in taking new office space in recent years, in many instances overtaking financial services to become the biggest single occupier group.

Even during the pandemic major deals have been announced, a sign of sustained confidence in city centres. In August, Facebook signed a new 730,000 sq ft lease at New York's landmark Farley building. Netflix announced in October plans to treble its office space in London. Tencent, ByteDance, Alibaba and Amazon are all making moves into, or expanding in, Singapore. TikTok is seeking space in London and Dublin.

But tech occupiers have also been contributing to rising levels of sublease space, particularly in tech-dominated San Francisco that, prior to the pandemic, was one of the tightest office markets in the US. Tech companies have long embraced flexible working and many quickly announced workforce-wide work from home directives in the wake of the pandemic. While some deals are happening, others are being put on hold or space is being shed as occupiers re-evaluate space needs.

Flagship tech HQs will remain important, however, as places to instil company values, for staff to come together to collaborate and share ideas. Big tech companies have invested heavily in their urban HQs in a bid to attract the best staff, ranging from Amazon's downtown Seattle HQ, complete with iconic biodomes, Google's 'landscaper' under construction at Kings Cross in London, to Tencent's 50-storey vertical campus in Shenzhen.

Testbeds for technology

These high-spec workplaces will only become more important as the pandemic recedes to tempt existing employees back into the office, and as a tool to attract the best and brightest of tomorrow's talent. Skilled employees in the tech sector remain a scarce resource, even as unemployment rises in other professional sectors. More than an office, these spaces are also testbeds for the new technologies, products and services these companies are developing.

Many of our Tech Cities have seen costs of residential accommodation rise in recent years as workers flocked to these cities. The

pandemic may slow this trend, at least in the West, as people seek a more diverse range of places in which to live, enabled in part by more homeworking.

This may open up city centres once again to a fresh crop of young trendsetters, the lifeblood of the tech sector. Rising availability in CBD offices may see districts previously out of reach become more affordable to scaling tech companies, opening up new parts of cities to the tech sector. Redundant retail, repurposed for these occupiers as satellite locations, could bring the office closer to worker's homes.

Things are different in parts of Asia where smaller apartments make homeworking long-term unappealing. In China, nearly all staff have been back in the office for months already. We expect the Tech Megacities to continue to rule here, fuelling demand for office and residential space within them.

Across all cities, public transport will need to be complemented with good options for personal mobility, walking, cycling or scooters. Property located in neighbourhoods that do this well will be first to benefit from future demand.



NORTH AMERICA

- Los Angeles
- New York
- San Francisco
- Toronto

EUROPE

- London
- Paris

ASIA PAC

- Bengaluru
- Seoul
- Singapore
- Tokyo

CHINA

- Beijing
- Chengdu
- Hangzhou
- Hong Kong
- Shanghai
- Shenzhen

Tech Megacities

Global connectivity, complementary industries and a deep talent pool make Tech Megacities highly attractive to both scaling and established companies. Business ecosystems of likeminded people help tech companies located here to grow.

Tech Megacities are also leading funding hubs. Even in 2020, with all of its attendant upheavals, megacities remain magnets for VC investment.

The US-China trade war has shifted the dynamics of global investment, and investment into some cities is growing faster than others as a result. Singapore, for example, saw VC investment volumes grow by more than 230% between 2016-17 and 2018-19.

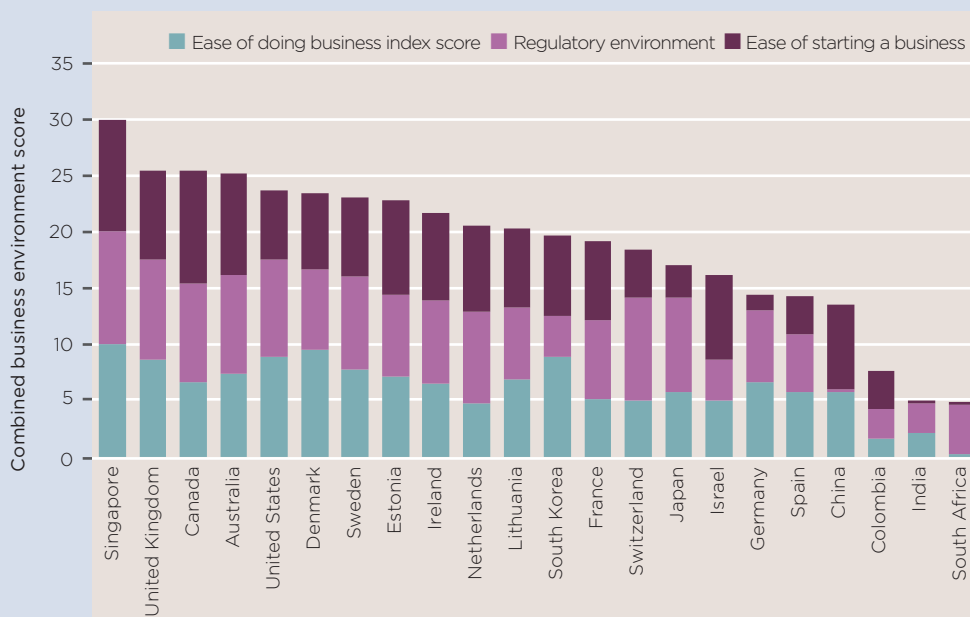
This came, in part, as tech investment grew more rapidly in cities outside the US and Chinese hubs. Singapore is considered

a neutral city with good links to both Asia and the US. Chinese tech companies have made moves to expand in the city.

Ease of doing business plays a big role in the attractiveness of the Tech Megacities, a metric in which Singapore also performs very well. Looking more broadly, over a third of Savills Tech Cities are located in the five most business-friendly countries (see chart).

Tech Cities are concentrated in business-friendly countries

Business environment by country



Source Savills Research using Global Innovation Index

Scale	A large, global city (over 5 million pop) or global epicentre for tech
Tech industry	Major VC recipient, a primary tech hub within region
Business environment	Globally connected, multiple complementary industries including creative sectors
Talent pool	World leading higher education. High levels of international or national in-migration
Buzz	Vibrant urban neighbourhoods, nightlife, café culture
Cost	Cost of living usually higher than the national average

Future of the Tech Megacity

Rising costs have long been a challenge for occupiers in the Tech Megacities. Now, with health and wellbeing at the top of the agenda, large and crowded metropolises have another hurdle to overcome. Many are responding by expanding pedestrian and cycle networks in a bid to boost personal mobility.

Paris is piloting the '15 minute city' where most amenities residents' needs are within a 15 minute walk or cycle from their home. Shanghai is creating cycle lanes along its riverside while preserving adjacent historical structures. The City of London introduced wider footpaths, narrower driving lanes and

timed road closures in light of the pandemic and changing mobility patterns in the city.

In China the Megacity rules and will continue to do so. Of the 16 cities we classify as Tech Megacities, six are in China. Big cities dominate the tech landscape here, in large part because of the top-down approach the central government takes towards many aspects of the state and the economy, designating cities and districts for specific purposes. In China, big cities are seen as places of progress, job opportunities in tech have fuelled massive amounts of in-migration, further supported by government-funded talent-attraction policies. Shenzhen

and Hangzhou, in particular, are developing quickly, with population growth of 3.2% and 3.5% respectively, in 2019 alone.

From scaling start-ups to global mega corporations, the Tech Megacities will remain essential places for the industry to locate. The size of these cities alone means they can offer a depth of talent so important to the sector. But the pandemic has been a catalyst for change and has brought the particular challenges these big cities face to the fore – pollution, crowding, and high costs of living. They must respond to these challenges to ensure they remain attractive to the talent that underpins their success.



NORTH AMERICA

- Austin
- Boston
- Denver
- Seattle

EUROPE

- Amsterdam
- Barcelona
- Berlin
- Copenhagen
- Dublin
- Stockholm

ASIA PAC

- Melbourne

MENA

- Tel Aviv

Tech Lifestyle Cities

Tech Lifestyle Cities offer city living on a smaller footprint. This means shorter journeys for work and play (often by bike), contributing to a better work-life balance – all without sacrificing the buzz of a larger urban centre. Talent magnets, Tech Lifestyle Cities centres punch well above their weight on a global stage.

Historically cheaper than their Megacity

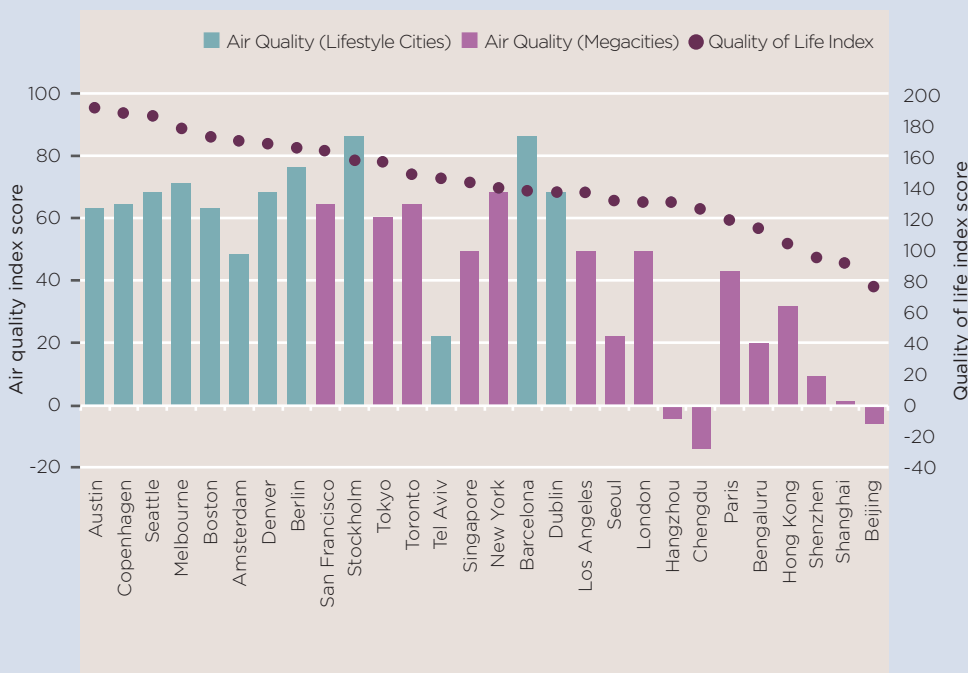
counterparts, some of that cost advantage has eroded in recent years as competition for talent has driven up salaries and costs of living have risen.

But they have one major advantage in today’s environment. Our analysis shows they have, in most cases, superior air quality, contributing to a better quality of life for residents than the Tech Megacities (see chart).



Living well in Tech Lifestyle Cities

Quality of life and air quality



Source Savills Research using Numbeo and WAQI

Scale	City sized, under 5 million population
Tech industry	Large or medium-sized and growing
Business environment	Global or regional with international connectivity, presence of complementary industry
Talent pool	At least one high ranking institution, often a university town. A talent magnet
City Buzz	Vibrant urban neighbourhoods, nightlife, café cultures, etc, on a smaller footprint
Wellness	Usually a good balance between sustainable city living and easy access to out of town pursuits
Cost	Lower than the Tech Megacities but often rising

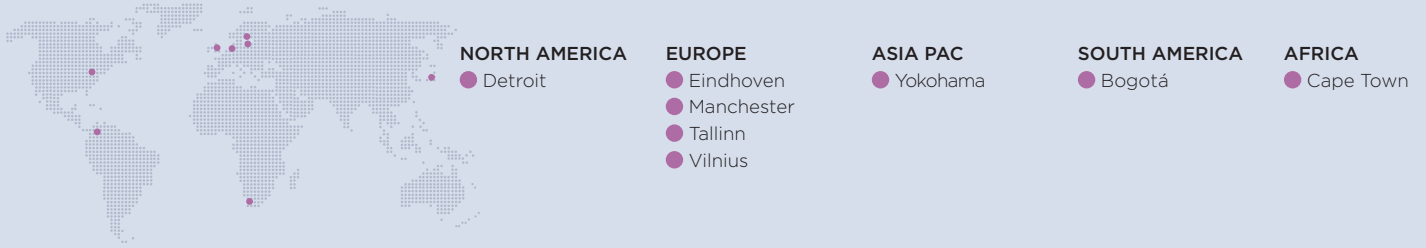
Eight of 11 Tech Lifestyle Cities have more than 100sqm of greenspace per capita, while Berlin, Copenhagen, and Amsterdam each have more than 500sqm of greenspace per person, according to OECD data. Melbourne, Barcelona, and Denver offer direct access to beaches or mountains. Denver is within touching distance of the Rocky Mountains and Colorado has been named America’s ‘thinnest state’, in no small

part because of the outdoor pursuits accessible to it. Factors such as these underpin their attractiveness to mobile tech talent.

Given that the Covid-19 pandemic has led to many people purportedly looking to prioritise a better standard of living going forward, a strong performance here may indicate a city’s further growth in the years ahead. Denver, for example, has been a

beneficiary of tech talent moving out of the San Francisco Bay Area looking for comparatively lower cost living, but with all the benefits of the outdoors on its doorstep. Tech companies in the Lifestyle cities can offer their staff healthier environments and better affordability, with high levels of in-migration supporting future expansion. These benefits must be set against rising costs, a product of their own success.

🏡 Tech companies in Lifestyle cities can offer their staff healthier environments and better affordability, with high levels of in-migration supporting future expansion 🏡



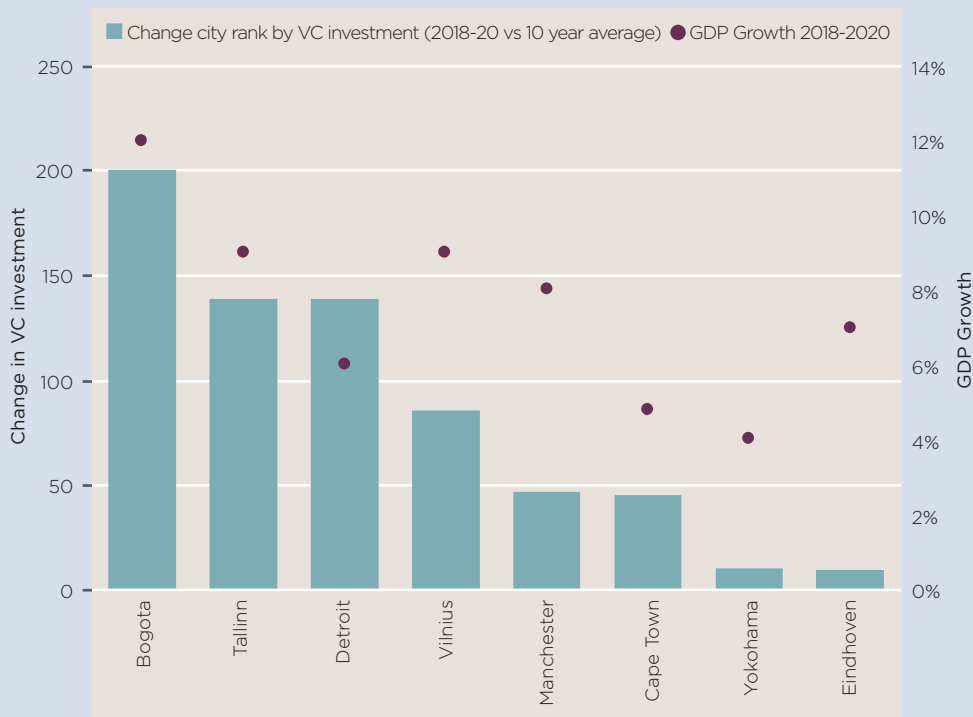
Rising Global Tech Contenders

Rising Global Tech Contenders are the cities to watch in the tech world. Characterised by huge leaps in venture capital (VC) investment in recent years, economic growth in these cities is being fuelled by burgeoning tech sectors.

Rising on a global stage, they offer cost and lifestyle advantages over their established peers. Some have found legacy industries for which they were once famous revitalised by technological advances.

These cities are likely to see growing demand from occupiers expanding in these locations tapping into skilled talent at a lower cost, or from home grown tech companies riding the wave of developing tech subsectors.

Tech Contenders change in VC investment rank and GDP growth
Tech can drive economic growth in Contender cities



Source Savills Research using PitchBook and Oxford Economics

Scale	City sized, varies - but characterised by growth
Tech industry	Rising from lower base, and/or easily accessible to a larger tech hub. Recorded big jumps in VC in recent years
Business environment	Good regional connectivity with some international connectivity
Talent pool	Strong higher education sector. A growing talent magnet. In-migration rising
Buzz	Vibrant urban neighbourhoods, nightlife, cafés, culture, etc
Wellness	Usually a good balance between sustainable city living and easy access to out of town pursuits
Cost	Lower than both Tech Megacities and Tech Lifestyle Cities

The Contenders

From Bogotá to Yokohama, here are eight Rising Global Tech Contenders

REINVENTION AND RESURGENCE



KEY:

Digital Nomad Essentials Index rank
(see page 3)



DETROIT

Devastated by the GFC and the near-collapse of the American auto industry, Detroit is reinventing itself from 'motor city' to 'mobility city'. Detroit is now focussing its attentions on mobility technologies and ushering in a new age of personal mobility. From partnerships between Fiat-Chrysler and Google to GM and Lyft to Ford's Smart Mobility division and its partnership with EV start-up Rivian, tech is now at the heart of its auto industry. With some of the lowest costs of living of major cities in the United States, Detroit is well placed to offer mobility-tech workers better quality of life and value for money than the major East or West Coast cities.



YOKOHAMA

One of the first Japanese ports to open to foreign trade in the mid-nineteenth century, Yokohama has been a centre of shipping and trade in Japan for 150 years. In recent years the city has attracted international investment and company relocations because of the accessibility to Tokyo and other industry centres and its highly skilled workforce. Yokohama is establishing itself as an R&D centre in the Asia Pacific region with Apple, Lenovo, Samsung, Huawei, and LG all establishing R&D operations in the city. While shipping and trade will still play a major role in Yokohama's economy, the shift to technology and development will only boost the city's global profile. Yokohama offers residents a lower cost of living than neighbouring Tokyo, but with more space, making it an attractive alternative to the pricier districts of Tokyo.

DIGITAL NATIVES



TALLINN

While many governments worldwide struggle with technology and its ever-growing role in people's lives, 99% of Estonia's public services are available online. In 2014, the country pioneered e-Residency permits, which allow individuals to start businesses in Estonia without physically living there. Building on this, Estonia has recently launched a digital nomad visa that will allow remote workers to live and work in Estonia for up to a year. Tech drives not only the national economy but also that of the capital, Tallinn. Tallinn is home to Cooperative Cyber Defence Centre of Excellence (CCD COE) of NATO, the EU IT agency (eu-LISA) and other tech giants. This complete integration of tech with government and daily life provides an excellent environment for businesses and individuals in the tech industry.



VILNIUS

A leader in cybersecurity, software engineering, and fintech, Vilnius is another Baltic city with hefty tech credentials. Lithuania has over 1,000 start-ups and 200 fintech companies, all of which are driving investment and growth in the country. E-money start-up Revolut and Google Payments both have offices in Vilnius. Europe's first Blockchain Centre opened in Vilnius in 2019. The centre is part of a global network of co-working spaces that are being developed to serve as knowledge-hubs for the blockchain industry. Similar to Estonia, Lithuania has initiated a 'start-up visa' that makes it easier to attract and retain top tech talent from non-EU countries.

SECOND FIDDLE NO LONGER



KEY:

Digital Nomad Essentials Index rank

2



EINDHOVEN

The location of Brainport, a region in which companies, governments and educational institutions can collaborate on projects, Eindhoven is a centre of tech and innovation in the Netherlands. Some 8 million people are within a 60 minute drive of the city. ASML, Philips and VDL call it home. Eindhoven is also the location of the High Tech Campus which bills itself as ‘the smartest km2 in Europe’. This campus houses over 220 companies and 12,000 researchers. Lower cost of living than Amsterdam and higher quality of life scores will continue to draw talent and businesses to the city. The Dutch have the most bicycles per head than any other country, and Eindhoven, in particular, is a cyclist’s paradise with dedicated cycle lanes and an elevated cycle roundabout called the Hovenring. The openness to tech has boosted Eindhoven’s economic growth and international reputation.

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MANCHESTER

Whilst a great deal of Manchester’s international profile comes from football, nearly everyone on earth can recognise a Manchester United shirt, it isn’t the city’s only claim to fame. Manchester has a thriving community of more than 10,000 digital and tech businesses, from start-ups to global companies like Google, Microsoft, IBM and Cisco. Manchester has a strong knowledge economy with three internationally ranked universities, providing highly skilled workers for the tech industry but also allows academics and enterprises to work together on projects. The University of Manchester, in particular, is spearheading the development of graphene for industrial and medical use. This forward-thinking city has set an ambitious zero carbon target of 2038, 12 years ahead of the national target, and is planning a 1,800 mile cycle and walking network across the Greater Manchester area.

GROWING BY LEAPS AND BOUNDS

11



BOGOTÁ

Rising over 200 places in the global VC rankings in the last four years, Bogotá is the fastest growing city of all the Savills Tech Cities. The Colombian government has been investing heavily in the tech industry by providing training programmes for workers and tax incentives for companies. iNNPulsa and Apps.co, both government initiatives, promote business development in Colombia and provide digital entrepreneurs with resources to increase their chances for success. Bogotá’s strategic geographic position has helped it become a strategic tech hub for the region. A 2019 EY report found that Columbia has the highest fintech adoption rate in Latin America, with 76% of the population using some form of fintech service. This vibrant, walkable city offers residents good access to parks, pedestrianised streets and squares.

24



CAPE TOWN

Cape Town is home to several of South Africa’s largest financial institutions, and fintech start-ups are taking advantage of the mature financial ecosystem in the city to scale up and gain notice. Fintech companies are not the only start-ups in the city. According to Invest Cape Town, almost 60% of South Africa’s start-ups are located in Cape Town. VC investment in the city is booming too; from 2016 to 2019, VC investment grew by 147%. A stunning setting at the foot of Table Mountain, low cost of living compared to other tech cities, and inexpensive flex-working space provide Cape Town with ample assets for continued growth in the coming years.



Suburban and campus tech hubs can offer more open space and easier access to outdoor pursuits than urban destinations

The Space Race

With the emphasis firmly placed on health and wellbeing, campus tech hubs offer an alternative to city-based locations

Tech campuses have taken on a fresh relevance in a time of social distancing and newfound focus on health and wellbeing. While tech talent has favoured the urban in recent years, the pandemic has led some to reassess the benefits of a city environment.

Suburban and campus tech hubs can offer

more open space and easier access to outdoor pursuits than urban destinations.

Such campuses are many and varied in their form and can enable activities (particularly in the case of life sciences) that may not be possible in a densely populated urban setting. Often developing around a single anchor organisation, many

have grown up to become places in their own right.

These are five campus examples with wellness at their core. City microcosms, they embrace principles of city planning in their design and operation, with a view to foster chance interactions, improve productivity and wellbeing.



1. Redmond, Washington State, US

Microsoft's 8 million sqft global HQ, home to 37,000 employees, is at the heart of the Redmond tech scene which also counts Nintendo and Space X as occupiers. A town of 70,000 people and part of the Seattle metropolitan area, Redmond is a cyclists' paradise, hosting numerous cycle trails and the state's only velodrome. Well-located for access to outdoor activities, hiking, climbing, and wineries are on the city's doorstep.



2. Sophia Antipolis, Valbonne, France

Located north of Antibes on the Côte d'Azur, Sophia Antipolis is an internationally renowned science and technology park that employs some 36,000 people. One of Europe's first technology campuses when it was developed in the 1970s, it has succeeded in creating a tech and scientific location in a previously untested location. Two thirds of the site is greenspace, and its location means it is within two hours of skiing in the Alps and under half an hour from the region's beaches.



3. Xixi Campus, Hangzhou, China

Alibaba's Xixi campus is home to 22,000 employees, and located to the west of Hangzhou, close to West Lake, a UNESCO World Heritage site of significant Chinese cultural importance. The campus is organised and linked in order to create a connected and productive community with a variety of workspaces, open spaces and health facilities. It is a testbed for many of the company's technologies: autonomous vehicles operate deliveries, cameras enable auto-payment of food in the cafeterias.



4. Apple Park, Cupertino, California, US

Apple Park is a 2.8 million sqft, four storey circular building, home to more than 12,000 employees. Some 80% of the site is given over to greenspace of indigenous planting. LEED certified, there are jogging and cycling trails across the 175 acre campus. Located in Cupertino, city law dictated extensive car parking provision and 11,000 spaces were provided. Combined, these take up a greater area than the office space itself. State and county parks, famous for their giant redwood trees, are on Cupertino's doorstep.



5. Harwell Science and Innovation Campus, Oxfordshire, UK

Harwell is located in the Oxford-Cambridge innovation arc, a region with the UK's greatest growth potential outside of London. Its countryside situation allows easy access to the Chilterns. The campus extends to 700 acres, and is home to more than 200 organisations, 90 of these are space organisations making it the largest space cluster in Europe. Large-scale specialist R&D facilities, such as the Diamond Light Source Synchrotron, are made possible by spacious setting.



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