



Marienpark – Starting the Campus

Marienpark Location

Innovation in the south of Berlin

From 1901 to 1996, the Marienpark grounds served as one of Berlin's largest town gas production sites. During that time, town gas was utilized for street lighting and heating households in the southern part of Berlin. Presently, the Marienpark spans over 300,000 square metres and is operated by a subsidiary of Investa Holding.



The Marienpark offers the unique opportunity to combine modern commerce and production with historical buildings, natural spaces, and a high leisure potential. Dynamic networks encounter the ideal infrastructure, commercial areas coexist with picturesque nature, and innovation thrives within a feel-good atmosphere.



Marienpark Berlin



A place for business and society in the digital transformation. Supported by a lively community in an inspiring environment.

Key facts

- Total area
- Historic core
- Total area of new buildings

appr. 300.000 m²
appr. 16.000 m²
appr. 250.000 m²
(thereof 125,00 m² adjacent to the historic core)

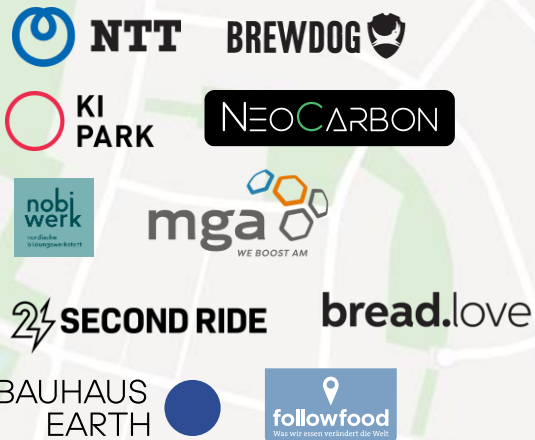
Use

Office, commercial, gastronomy, laboratories & light production, data center

Existing buildings & industrial landmarks

- 1 Old tool shed
- 2 Engine shed I
- 3 Old tool shop
- 4 Old canteen
- 5 Old water tower
- 6 Old boiler house
- 7 Apparatus house
- 8 Brewery (cleaning hall)
- 9 Bottling paint
- 10 New water tower
- 11 Gasometer
- 12 Engine shed II

Excerpt existing tenants



Marienpark Networks



KI Park and MGA accelerate the transfer to life sciences and tech companies in Berlin

In Progress



KI Park

The KI Park e.V. provides a unique ecosystem that brings together the forces of research institutions, startups and scale-ups, established companies, investors, as well as political and societal stakeholders with now over 110 members.

Excerpt members



Excerpt projects

- FLAGSHIP | TEF HEALTH (FAU, CHARITÉ, and more)
- STUDY | AI-DRIVEN NEXT GENERATION COMPLIANCE (BDI, VDE, VCI, SIEMENS, DSHK, FAU and more)



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Mobility & Medical goes Additive e.V.

MGA unites over 120 players from all areas of the market to jointly boost Additive Manufacturing. The community consists of users, R&D institutes, consultancies, manufacturers, and software providers, involved in 11 working groups hosting more than 40 meetings every year.

Excerpt members



Excerpt projects

- Focus Group "Pharmaceuticals"
- Focus Group "Additive Manufacturing for medical use cases"
- Focus Group "Medical Materials"



Further cooperation & partnerships

Further cooperations are in discussion to build up a technology ecosystem, including:

- Cooperation on incubator spaces with local business development departments.
- Flagship centers for knowledge transfer together with universities and key knowledge providers
- Best practice is shown e.g. in Mainz, with Kadans cooperating with Technologiezentrum Mainz (TZM).

Marienpark Community

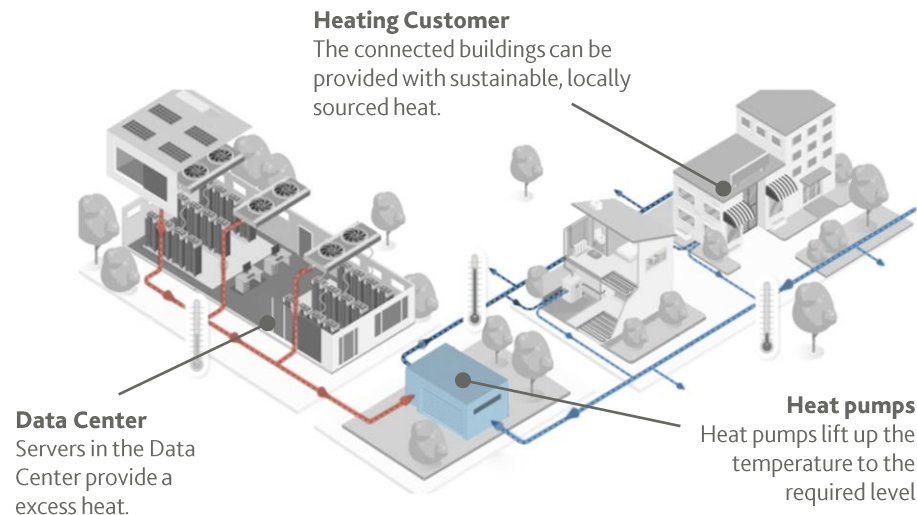


Data2Heat – powered by heat from data centers DATA2HEAT

At Marienpark, we utilize local waste heat from adjacent data centers, enabling our tenants to reduce costs, enhance sustainability, and comply with energy efficiency regulations.

Through the joint venture DATA2HEAT – a collaboration between the GASAG Group and Investa Real Estate – the buildings in the Marienpark will be supplied with up to 6 MW of thermal power from data centers in the future.

Find more information enquire at data2heat.de



NeoCarbon – direct AirCapture technology NEOCARBON

NeoCarbon reverses climate change by dramatically cutting costs of Direct Air Capture leveraging cooling towers around Europe. By retrofitting existing infrastructure without impacting their original function, the time and cost needed to set up a carbon capturing system is improved by up to 10x.

NeoCarbon was formed in Berlin in 2021 by René Haas and Silvain Toromanoff, two engineers passionate about ClimateTech, and is backed by Venture Capital fund Antler.

Find more information enquire at neocarbon.tech



Marienpark Infrastructure

Marienpark provides expansive green spaces, a variety of dining options, childcare services, recreational activities, and essential local amenities.



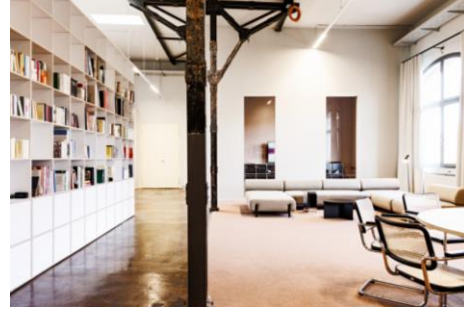
Kita Lillebror

Nestled within green spaces and existing buildings, the multilingual daycare (Kita) Lillebror opened its doors in July 2024, offering three groups for around 50 children, including a large outdoor area and a private playground.



Local Supply

There are several local supply options around Marienpark, including three supermarkets: Lidl, Aldi, and Rewe. The proximity contributes to the overall convenience of working in or visiting Marienpark.

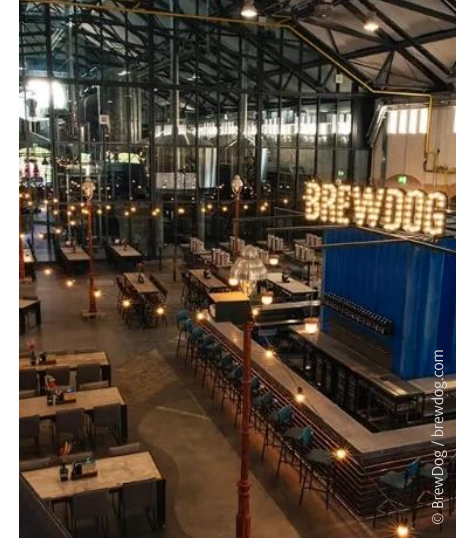


Creative Space

Our creative and event spaces have been revitalized and furnished with an interior concept by renowned designers. The creative spaces host companies from various fields, including AI, sustainability, CleanTech, and HighTech production. The premises of KI Park e.V. host approx. 40 events annually.

Schindler Campus

Near Marienpark, you will find the Schindler Campus. Schindler has its own canteen that offers healthy, local, and affordable lunch options. On the Campus, a Maker-Space "Ring Berlin" is under development, spanning almost 17,000 sqm.

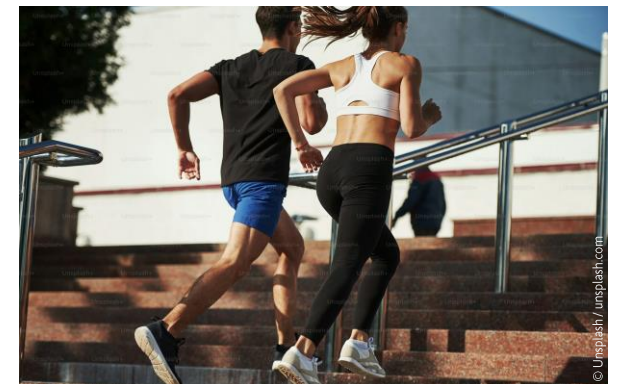


Food and Drinks

One of the largest craft beer breweries in the world from Scotland, which has been producing beer in Marienpark since 2019 and operates a large gastronomic experience with a beer garden.

Health & Wellbeing

Marienpark will feature terracing and outdoor spaces, extensive cycling facilities, amenities, natural ventilation through openable windows, and abundant natural daylight thanks to its generous ceiling heights.



Marienpark Development Plan



Gradual development of an innovation and high-tech campus with potential for new construction of up to approximately 125,000 sqm adjacent to the historic core.











Hybrick – Catalyzing the Campus

The Market



DEEP TECH

Can be classified into eight categories, all with recent technological breakthroughs.¹

 <p>Biotech & Life Science</p> <p>Synthetic Biology, Lab-grown Food, AI-enabled Drug Discovery</p>	 <p>Future of compute</p> <p>Supercomputers, Quantum Technologies, Ambient Computing</p>	 <p>Space tech</p> <p>Launch, Earth Observation, Nanosatellites, In-Space Manufacturing</p>	 <p>Novel AI</p> <p>Autonomous systems, explainable AI, privacy-enhancing tech, semantic AI</p>
 <p>Novel energy</p> <p>Green hydrogen, nuclear fusion, geothermal, next-gen solar, waste heat recovery</p>	 <p>Robotics</p> <p>Humanoid robots, nanorobotics</p>	 <p>Defense tech</p> <p>Cybersecurity, drones</p>	 <p>Advanced materials and nanotechnology</p> <p>Green concrete, graphene, nanomaterial</p>

 Sectors with increased needs for specialized buildings with lab and production access.

¹ According to McKinsey DeepTech Myths Report (2023)..

² BCG/Natixis, Explore Tech Survey (2021).

³ Future Market Insights, Deep Tech Market Outlook to 2034 (2024).

⁴ Deloitte How corporate real estate can support cost-cutting programs (2020).



90%

of European companies invest in deep tech. Almost 65% are pursuing concrete own projects.²



44%

Deep Tech funding is becoming a larger part of overall European VC tech funding, having grown from ~10% of regular tech funding in 2010 to 44% in 2023.³



20%

Of the cost-structure of a (deep) hardware technology company is spent on real estate, making it a central expenditure.⁴

Addressing the problems of Deep Tech Companies & Life Science companies



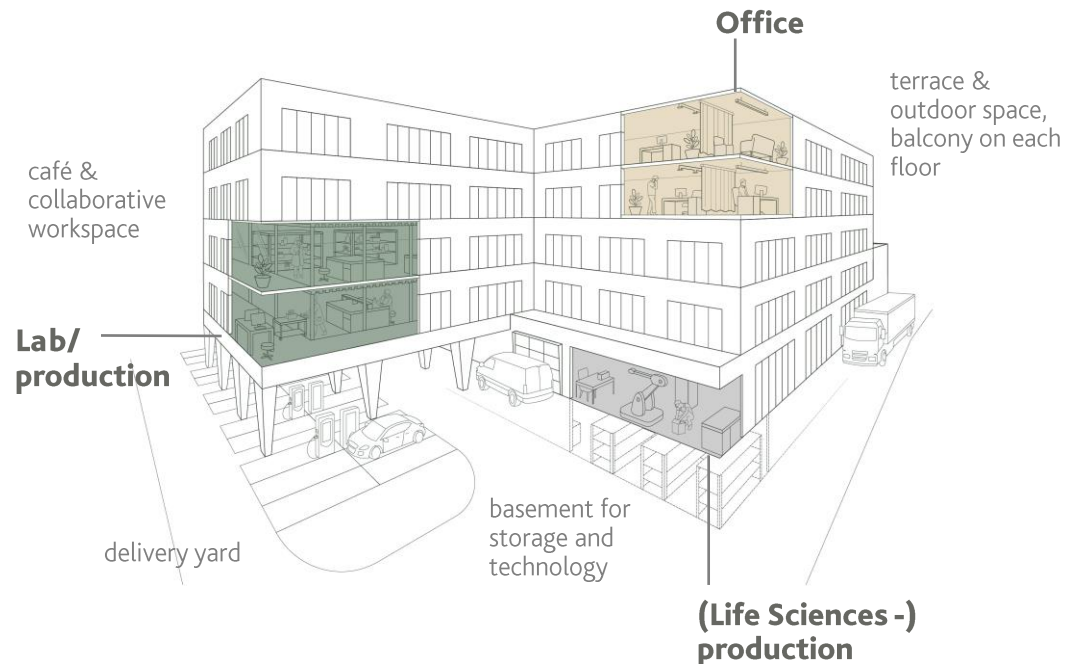
Helping the industry through a product-based approach

Challenges of the industry	HYBRICK's solution	
Inefficient, inadequately equipped spaces	Specialized labs and high-tech spaces	<ul style="list-style-type: none"> – Lab and production layouts based on intensive user process analyses – Cutting-edge facilities featuring the latest technology to support advanced scientific research – Spaces are designed with rigorous safety measures and regulatory compliance in mind, creating a secure environment for scientific endeavours
High capital and resource commitment for real estate and infrastructure	Comprehensive interfaces and shared infrastructure	<ul style="list-style-type: none"> – A comprehensive landlord-tenant interface helps tenants to reduce investment costs – Central utilities reduce costs and optimize resource utilization across the property – Shared services like maintenance, waste management and security ensures a hassle-free experience for all tenants
High energy consumption and high environmental impact	Net zero concept	<ul style="list-style-type: none"> – Usage of excess heat from adjacent data centers – Wooden facade features high carbon emission savings compared to conventional facades – Well thought-out energy concept in collaboration with strategic partnerships
Missing flexibility for growth	Flexibility for growth	<ul style="list-style-type: none"> – Flexible layouts allows for easy reconfiguration and third-party usability to match changing requirements – Expandable spaces allow businesses to grow within the same location – Infrastructure that can accommodate future technological advancements
Access to qualified employees	Amenities and integrated locations	<ul style="list-style-type: none"> – Various on-site amenities such as food and event spaces, green areas and showers, support the well-being of employees – Meeting and event facilities to enhance collaboration, client interactions and hosting of events

Our concept



Life Science & Deep Tech companies require a combination of use types and specific infrastructure



Life Sciences specific infrastructure

Life Sciences buildings have unique structural and technical requirements due to high energy usage, specific structural demands, and specialized equipment. Our cost-effective design avoids excess capacity and is designed for third party usability. We also incorporate dedicated office spaces to allow for high efficiency.

Clear ceiling heights

- Ground floor: 4.45 meters
- 1st -2nd floor: 3.60 meters
- 3rd -4th floor: 3.10 meters

Structural loading

- Ground floor: 10.0 kN/sqm
- 1st -2nd floor: 7.5 kN/sqm
- 3rd -4th floor: 5.0 kN/sqm

Freight elevators

- Load capacity: 2,500 kg
- Cabin dimensions: 150 cm x 290 cm x 240 cm

Delivery yard

Spacious delivery yard with sectional doors.¹

Specific building depths and grids

High building depth with 22-30 meters with a 1.35 x 1.20 meter grid for efficient lab and production layouts.

HVAC systems

- Labs: approx. 8 air exchanges per hour
- Production: approx. 4 air exchanges per hour
- Office: approx. 1,5 air exchanges per hour

Electrical infrastructure

- Labs / production: 140 W/sqm
- Office: 35 W/sqm

Cooling capacity

- Labs / Production: 95 W/sqm
- Office: 30 W/sqm

Connectivity & HPC²

Fiber to the desk system and HPC capacities in the neighboring colocation areas in Berlin.

Special requirements

Pre-configuration to accommodate special needs like explosion-proof exhaust, gas supply or emergency power generators (UPS)³ efficiently.

HYBRICK

investa
REAL ESTATE



Project Example: Hybrick Berlin

Life Sciences demand drivers

September 2024

Alexander Nuyken
Head of Life Sciences Markets EMEA



The demand for Life Science Real Estate is driven by classic real estate aspects as well as life science specific factors

Real Estate Factors

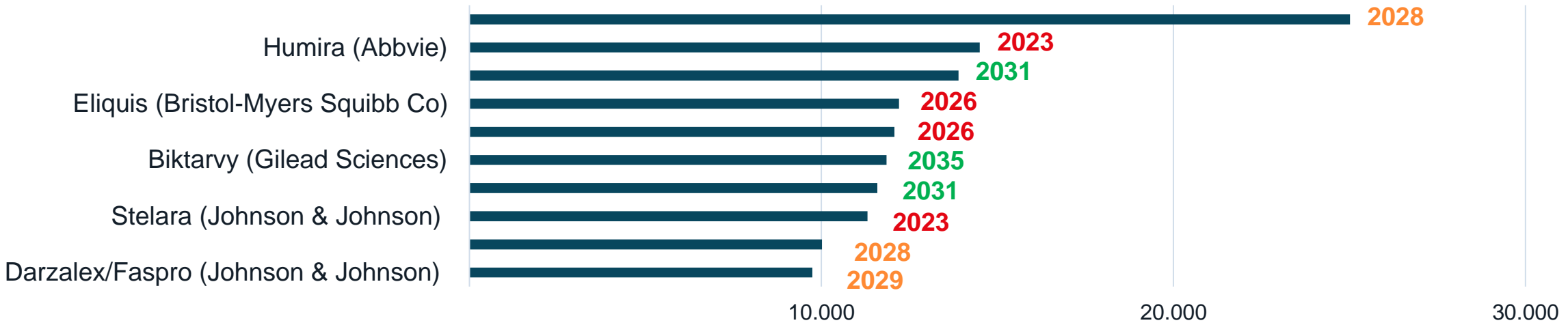
- Construction Costs
- Rent Levels
- Supply / Demand Balance
- Location
- Technical Requirements

Life Science Factors

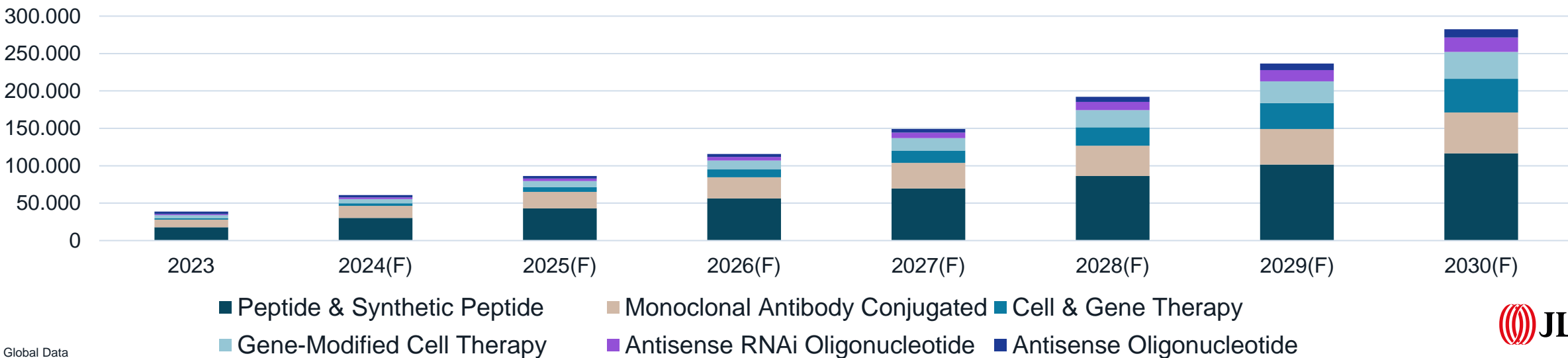
- Innovation Wave
- Patent Cliff
- Venture Capital
- Access to Talents
- Access to Innovation
- Business Model Shift
- Asset Light Approach

Patent cliff is pushing companies to innovate & refill their novel drug pipelines

Top 10 selling drugs 2023 (in \$m) & US patent expiry year



Top forecasted revenues by key molecule type (\$m)



Source : Global Data

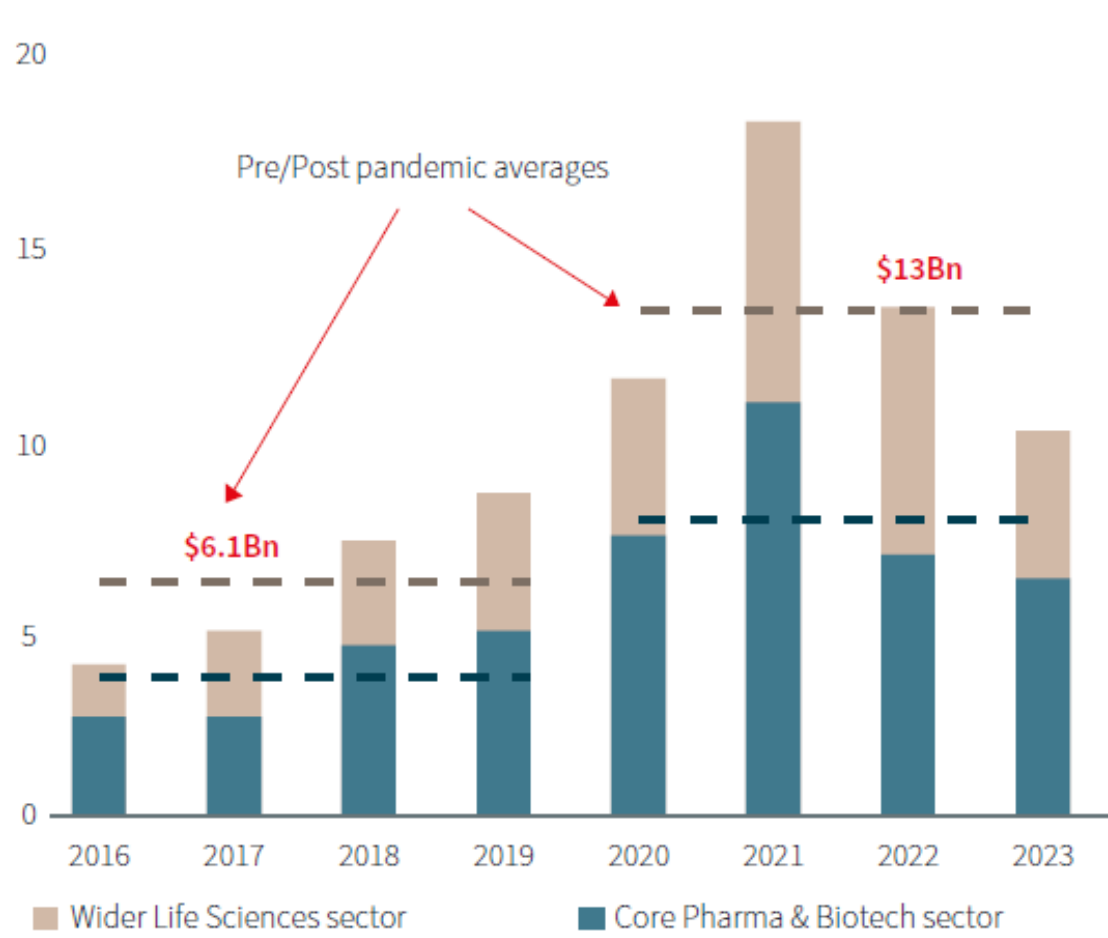


Funding environment still limited by macro-financial factors but trend to bigger funding rounds provides resilience

Companies	City	Deal Size \$M
Apollo Therapeutics	Cambridge	260.00
Catalym	Planegg	150.00
Tubulis	Planegg-Martinsried	138.81
Pheon Therapeutics	Harpenden	120.00
Myricx Bio	London	114.00
Medical Microinstruments	Pisa	110.00
SynOx Therapeutics	Dublin	110.00
Asceneuron	Lausanne	100.00
Grey Wolf Therapeutics	Abingdon	98.33
Bright Peak Therapeutics	Allschwil	90.00
iOnctura	Genève	86.48
Nouscom	Basel	82.43
Calluna Pharma	Oslo	82.24
Huma	London	80.00
Vico Therapeutics	Leiden	71.01
SciRhom	Martinsried	67.70
Timeline (Biotechnology)	Lausanne	66.00
Neurosterix	Geneva	65.00
Argá Medtech	Epalinges	58.31
Infinite Roots	Hamburg	58.00
Mission Therapeutics	Cambridge	55.79
Natural Cycles	Stockholm	55.00
SmartCella	Stockholm	53.73
Curve Therapeutics	Southampton	51.18
BioVersys	Basel	50.18
Beckley Psytech	Oxford	50.09



VC into European life sciences companies (\$Bn)

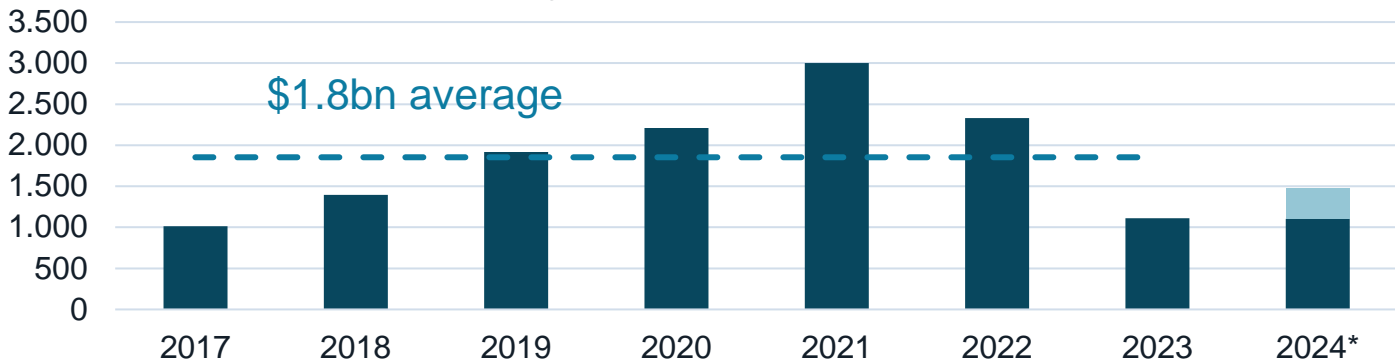


Source: PitchBook Data, Inc.; *Data has not been reviewed by PitchBook analysts

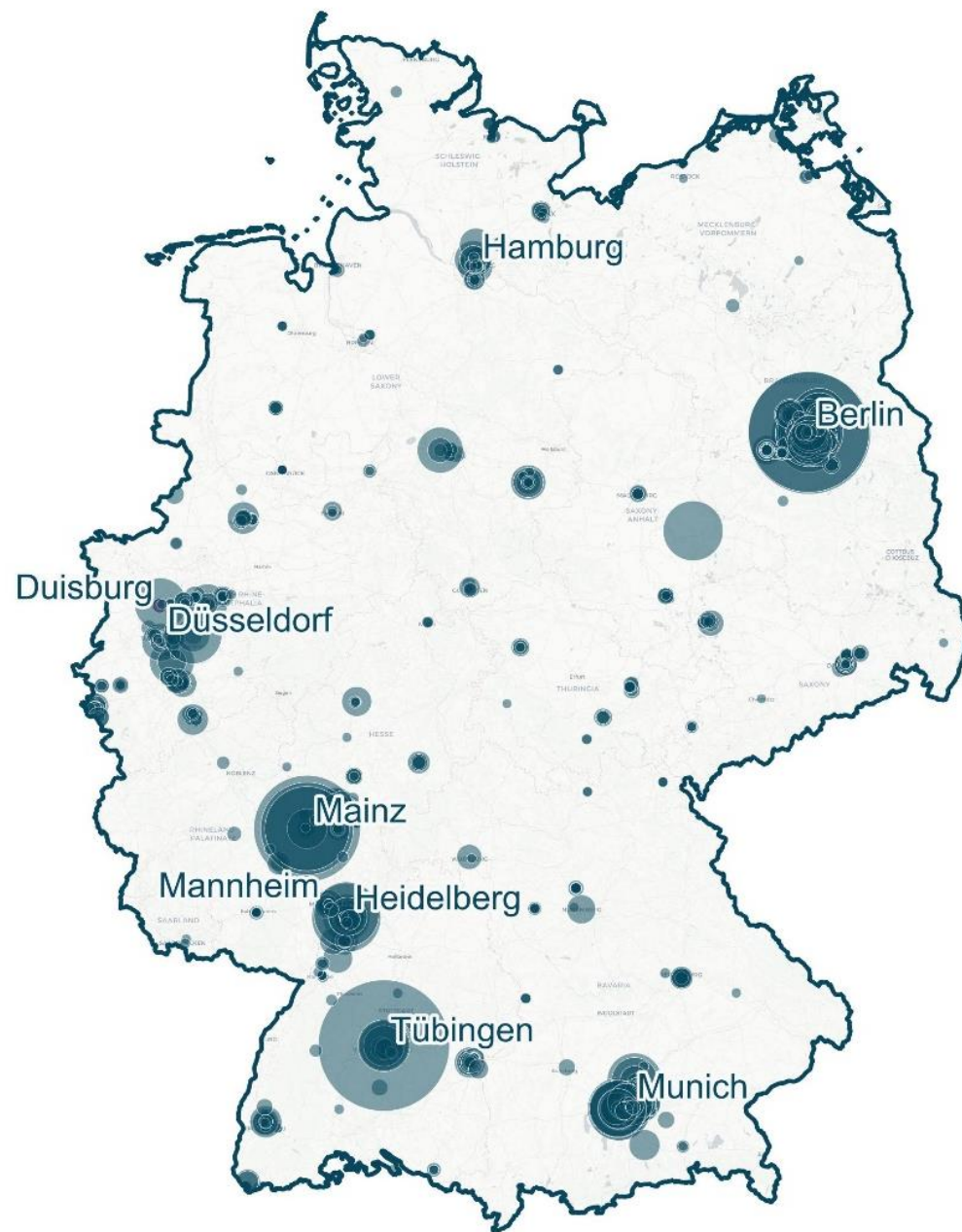
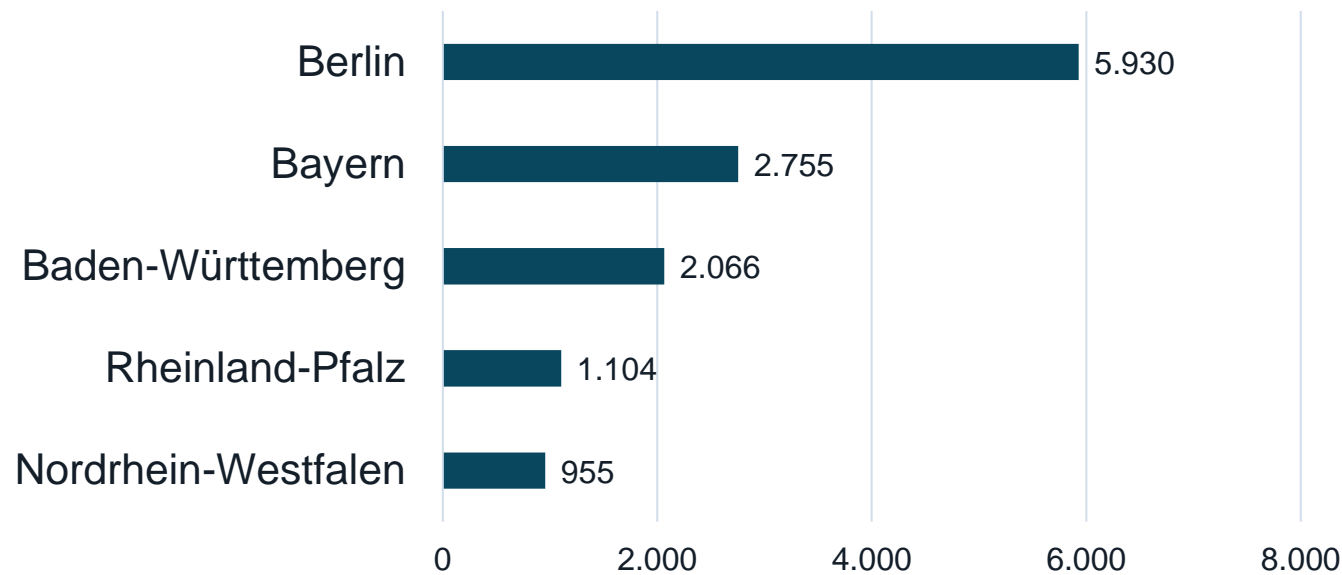


Germany's Venture Capital trends

Germany VC to Life Sciences



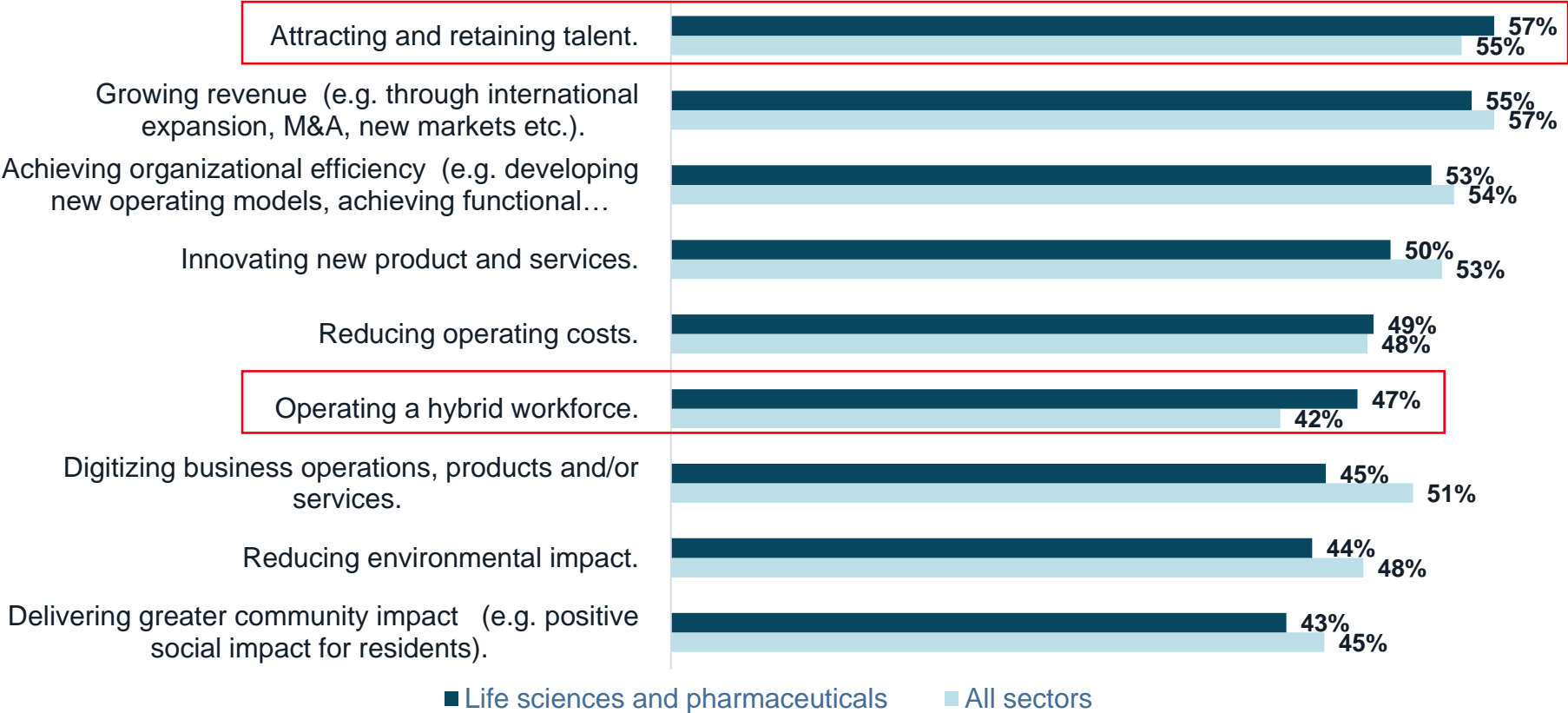
Top VC destinations 17-24 (in \$m)



Attracting talent & achieving growth are top priorities over the next 5 years for Life Sciences corporates

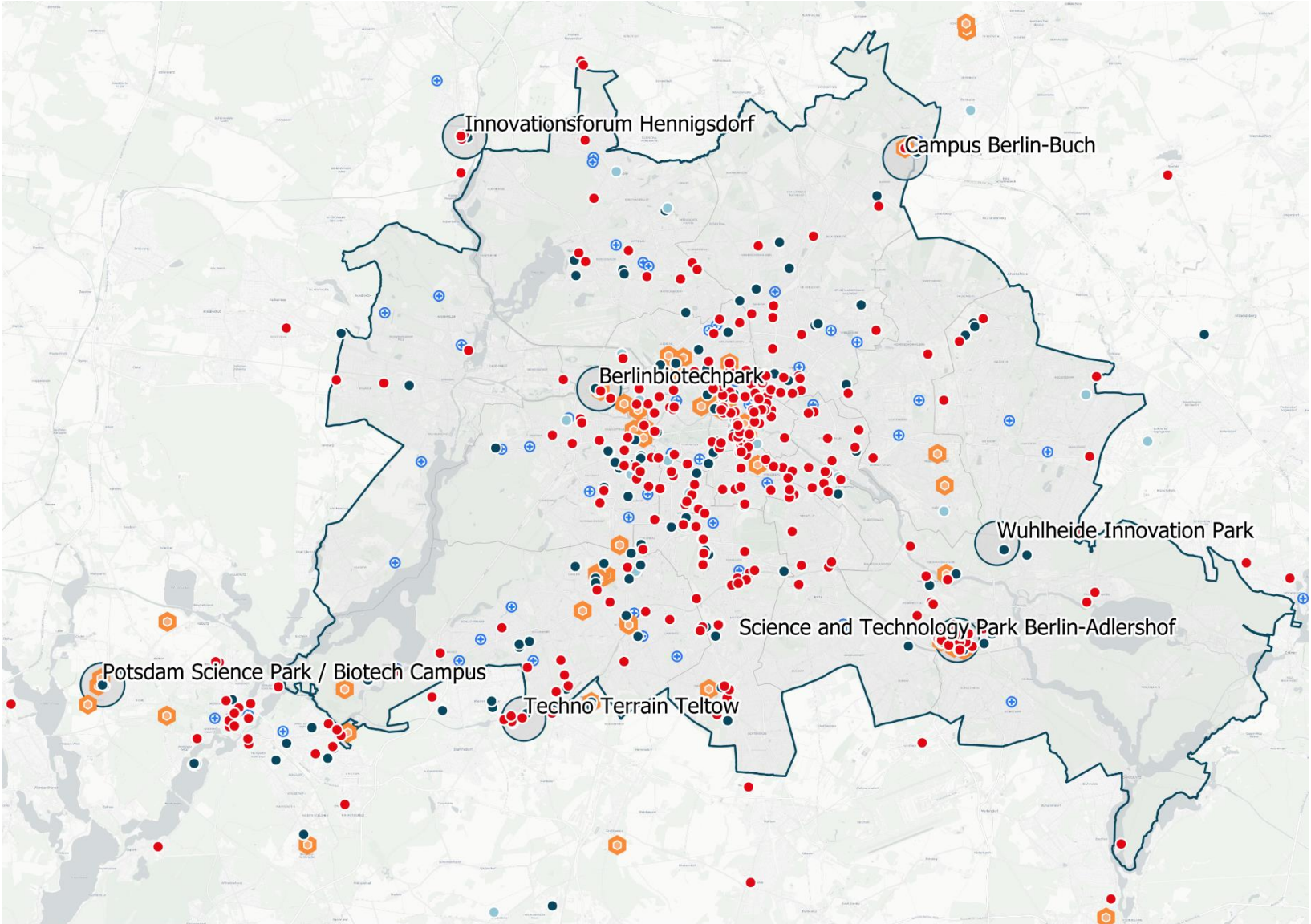
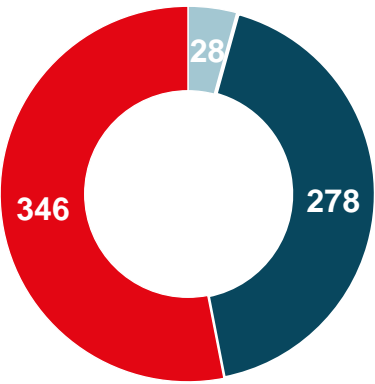
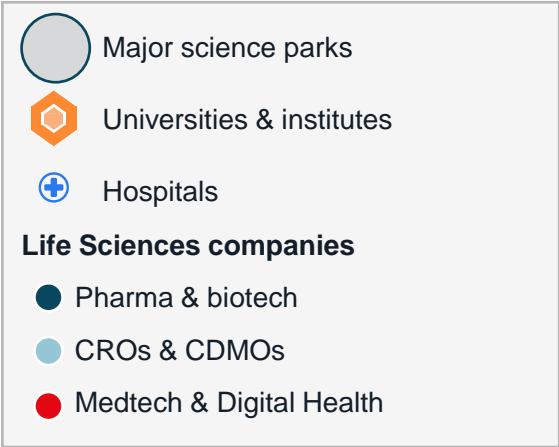
Operating a hybrid workforce a strong consideration compared to other sectors

Top corporate goals by 2030



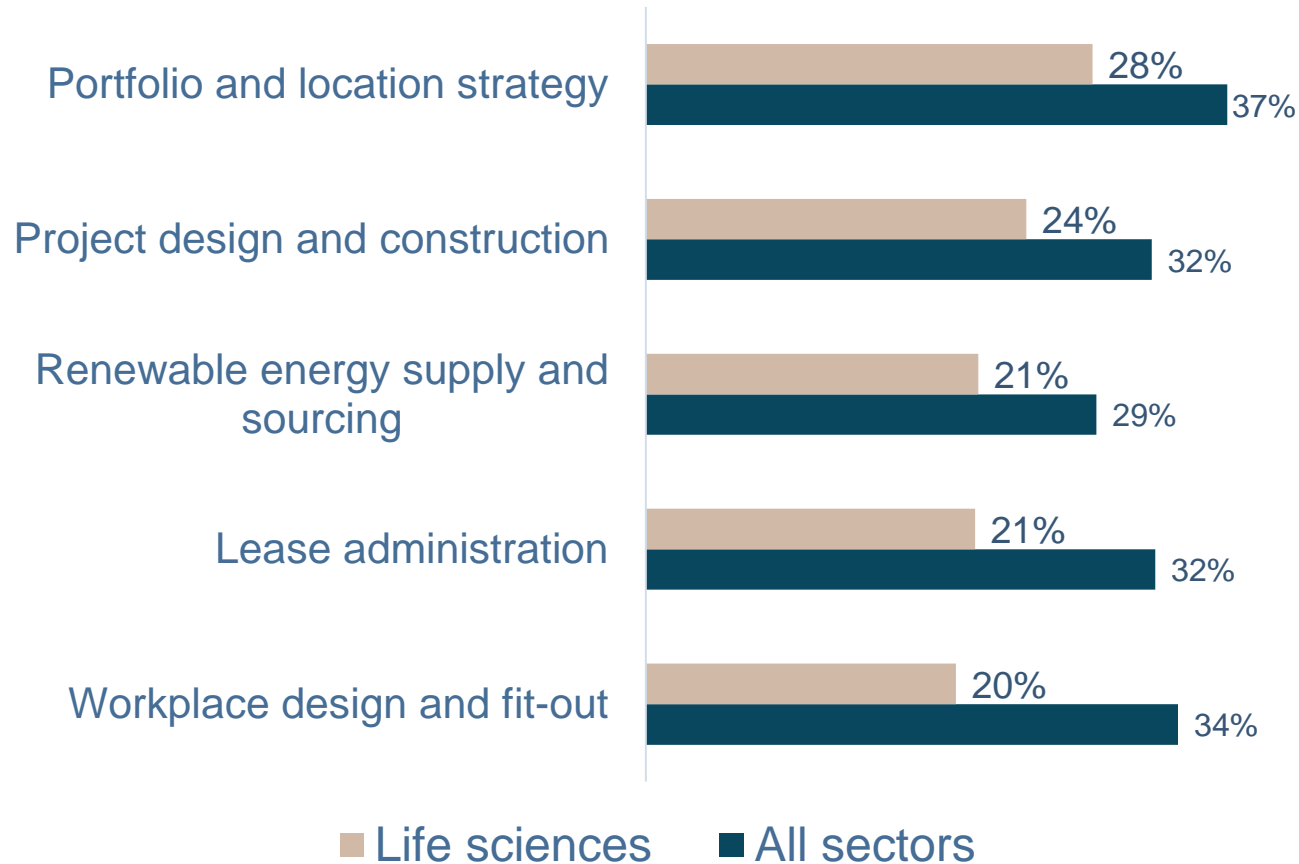
Everything is hyperlocal. Understanding local specificities is key to occupiers and investors looking to evolve in any given market

Berlin company landscape



Source : JLL Life Sciences Research / BerlinPartner

Doing more with less as we see a growing focus on efficient utilization of space opens the market for developers and investors



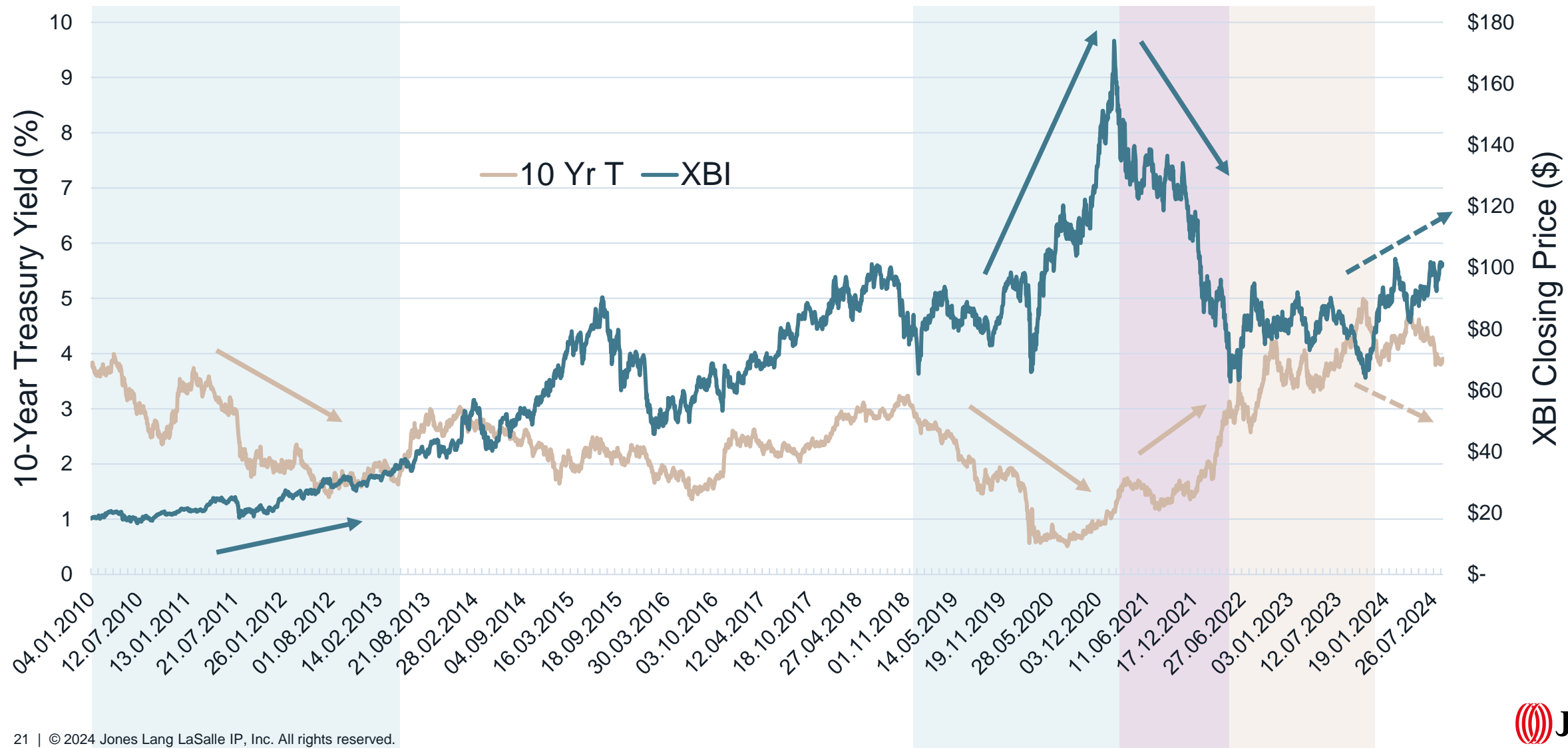
- Outsourcing
- AI & Automation
- Sale & lease backs
- Sustainability



% of corporates expecting CRE functions to be carried out "Mainly in-house" in the next 5 years

When rate expectations go down, biotech equity values go up

10-Year Treasury Yield and XBI Index



Thank you

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