

## British Land response to S/DS

Site ID 115169 / HELAA Site ID: 40048

British Land note the objectively assessed identified need within Greater Cambridge over the period 2024-2045 for the creation of 73,300 additional jobs across a diverse range of sectors and a minimum of 48,195 new homes to meet the needs of the total population. The approach to deliver specialist accommodation to meet the specific needs of older people and those with disabilities over the plan period is supported.

Notwithstanding this, British Land suggest that future planned growth in Greater Cambridge, facilitated by the emerging Local Plan, ought to be more aspirational and aligned with regional and national growth ambitions.

### Jobs

The Government's commitment to growth in Cambridge has been mandated through a combination of investment in the Cambridge Growth Company (and suggested proposed Development Corporation) and the 'Oxford-Cambridge Growth Corridor' ('the Growth Corridor'). It was noted on 23 October 2025 the ambition is for collaboration across the public and private sectors to transform the Arc in 'Europe's Silicon Valley'.<sup>1</sup>

On 23 October 2025 the Government announced the intention to consult on the formation of a centrally led Development Corporation which would be supported by £400 million of government funding to kickstart development, a pledge to increase supply of affordable housing, investment in infrastructure and business expansion with £15 million for the University of Cambridge. It is also understood the Cambridge Growth Company (CGC) are currently preparing their own evidence base to inform growth within Greater Cambridge. Whilst the details of the evidence base are unknown at present it is anticipated the CGC evidence base will seek to realise national ambitions for growth within Greater Cambridge and in turn may plan for a significantly higher level of growth than the GCLP.

As detailed within the Employment and Housing Needs Case, prepared by Volterra and submitted in support of British Land's Regulation 18 Consultation Submission, the Employment and Housing Evidence Update (Iceni 2025) will now likely need to evolve to align with the Government's broader growth agenda while ensuring the vision can be achieved sustainably, considering infrastructure capacity and deliverability.

The Iceni report provides an analysis of Greater Cambridge's commercial space requirements based on job forecasts, historical completions, and market signals. It is estimated that there is a need for 1.22

---

<sup>1</sup> "Jobs, homes and better transport links for the Oxford Cambridge Growth Corridor". *HM Treasury and The Rt Hon Rachel Reeves MP*. Published 23 October 2025, accessed 15 December 2025. Available at: <https://www.gov.uk/government/news/jobs-homes-and-better-transport-links-for-the-oxford-cambridge-growth-corridor>

million square metres of commercial floorspace between 2024 and 2045, with R&D space accounting for almost half of this need. Icenis approach to calculating these requirements combines three evidence sources: employment growth forecasts, recent development trends (completions), and market signals such as vacancy rates and take-up.

The final figures blend these inputs, applying buffers for market flexibility (10%) and vacancy (7.5%). For office space, Icenis adopt the central employment scenario directly. For R&D, they set a target slightly above the employment-based projections but below recent gross completions. For industrial space, they rely primarily on the 10-year market absorption rate rather than employment forecasts, recognising the limitations of modelling this sector through labour demand alone.

While this approach provides a structured framework, several aspects warrant scrutiny. The choice of employment scenario, the treatment of historical suppressed demand, the absence of a replacement factor for ageing stock, and the reliance on pipeline supply that may not materialise all affect the reliability of the final figures.

This required need reflects a central scenario of 73,200 jobs planned for over the period of 2024-2045. Icenis themselves, and other bodies, identify higher employment growth potential reflecting more ambitious growth, which would see a much greater spatial requirement. The most ambitious scenario published to date sees job projections of over twice (229,000) as high as Icenis central scenario (this is done over the period of 2023-2050 to allow for comparison).

The Icenis central scenario estimates further do not fully account for suppressed demand, where a persistent lack of available supply has constrained potential growth over the past decade. The following chart illustrates that R&D vacancy rates in Greater Cambridge have consistently remained below the equilibrium or frictional vacancy level necessary for a healthy market, highlighting this unmet demand.

Additionally, the estimates focus on net additional floorspace but overlook the need for gross completions to replace ageing or converted stock. Between 2011/12 and 2023/24, data from the Icenis report shows gross completions for R&D space exceeded net completions by 15%, indicating that a dynamic market requires a higher level of gross supply to meet net demand.

While the Icenis report provides a valuable foundation, we believe it underestimates the scale of future demand and overestimates the certainty of delivery. Suppressed demand, the need to replace ageing stock, and challenges in delivery all suggest that Greater Cambridge faces a greater shortfall in employment floorspace than currently anticipated, particularly for sites required to retain and enhance Cambridge's global competitiveness in this area. Deliverable sites like this one at South Trumpington will therefore be vital for supplying the flexible, high-quality spaces needed to support the region's strategic growth sectors – particularly as local policy evolves to reflect the Government's intensified focus on Cambridge's role as a driver of national economic growth.

Although the pipeline quantum looks substantial on paper for offices and labs, planning permission is not the same as delivery. The pipeline identified is reliant on a small number of very large schemes: the ten largest commitments account for over half of all outstanding floorspace, and the top twenty account for around three quarters. If even a handful of these stall or are scaled down, the headline supply

picture changes materially. Many of these are large, complex projects where phasing, viability and delivery risk are heightened.

The Council's Office and Laboratory Employment Trajectory (2024) underscores these delivery risks. It shows that a significant share of commitments are at outline stage or have flexible use class permissions, meaning the eventual mix of office versus lab space can shift prior to delivery. As the Council's own evidence notes, proposed developments can change through reserved matters and in response to market conditions, especially where applications are outline or for mixed E(g) components — introducing uncertainty over the type and timing of space that ultimately comes forward.

High construction costs, infrastructure requirements, and broader economic conditions could further affect whether developers build out all the space they have permission for, and when. A nominal surplus of permitted floorspace does not guarantee that occupiers will have suitable, available space when needed if developers phase construction, defer starts, or shelve projects. Indeed, some local planning reports commissioned by the Councils specifically highlight the importance of monitoring anticipated availability and delivery phasing as part of updating the trajectory and Local Plan evidence base.

The 2025 EHEU's acknowledgement that additional space will likely still be required in the 2030s despite the current pipeline further underlines that the pipeline must not only exist on paper but be deliverable in a timely manner to truly meet demand.

A wide number of sectors support the function of the Greater Cambridge economic eco-system. One key component being mid-tech which supports R&D by bridging the gap between research and production, providing facilities for prototyping, testing, storing and scaling innovations, and enabling the translation of discoveries into commercial products.

Iceni's latest work has identified a critical shortfall of industrial space in the pipeline, with only 28,595 sqm of net supply identified to meet a need of 317,000 from 2024-45. Future development at South Trumpington has potential to provide mid-tech space to allow companies spun out of Cambridge's research centres to build things in Cambridge (rather than relocating production elsewhere). Mid-tech space also creates more diverse job opportunities (mid-skilled technicians etc), aligning with inclusive growth goals.

In the context of this broader growth agenda, Iceni's analysis provides a useful foundation for understanding employment and housing need in Greater Cambridge. However, it predates the forthcoming work being led by the Cambridge Growth Company, which is explicitly focused on enabling a more ambitious scale of growth. The Growth Company is developing a new evidence base, with the intention of going beyond the current local plan approach in both scale and ambition.

Given Cambridge's position at the forefront of the UK's innovation economy, the next stage of evidence will need to test whether Iceni's identified level of need is sufficient to support that ambition. This next phase of plan-making will be critical in assessing whether planning policy and land allocations can genuinely deliver against the Government's objectives, maintaining Greater Cambridge's global competitiveness and fully capturing emerging opportunities in life sciences, AI and other innovation-led sectors.

## Homes and Affordable Housing

British Land suggest that in terms of identifying need for jobs and housing GCSP and the GCLP ought to plan for a higher growth scenario as outlined within Employment and Housing Needs Case (Volterra 2026). In turn it is proposed that the requirement to plan for higher growth will create the derived demand for additional allocations for jobs and homes, including affordable homes, within Greater Cambridge. Considering this, it is proposed that Land at South Trumpington can contribute to meeting the needs of Greater Cambridge over the plan period.

Policy S/JH sets out the requirements within the proposed 21-year plan period of 2024-2045. Regarding housing need, it sets out the need for a 'minimum of 48,195 new homes' within this plan period. Paragraph 62 of the National Planning Policy Framework (NPPF) seeks strategic policies to be informed by a local housing assessment conducted using the standard method in national planning practice guidance.

The latest Standard Method figures following the update in June 2025 seeks an annual requirement of 1,103 dwellings per annum within Cambridge City and 1,193 dwellings per annum within South Cambridgeshire District. Combined, this results in 2,296 dwellings per annum for the Greater Cambridge authority. Based on a 21-year plan period, the minimum housing need total should therefore be a minimum of 48,216 dwellings. The Local Plan should therefore be updated to reflect this figure.

The acknowledgement that the housing need figure is a minimum figure is supported. The Greater Cambridge authority should seek opportunities to support further development within sustainable locations.

There are concerns regarding the Local Plan's ability to deliver appropriate levels of affordable housing within the plan period. Table 7.16 of the Housing Needs of Specific Groups in Cambridge and South Cambridgeshire August 2025 sets out the net need for affordable housing as per the figures below:

- Cambridge City – 928 affordable dwellings per annum.
- South Cambridgeshire District – 708 affordable dwellings per annum.

This creates a total need of 1,636 affordable dwellings per annum. This represents 71% of the total housing need of 2,296 dwellings per annum. Recent levels of affordable housing delivery are set out in the table below:

<b>Year</b>	<b>South Cambridgeshire District Affordable Housing Delivery</b>	<b>Cambridge City Affordable Housing Delivery</b>	<b>Total Affordable Housing Delivery</b>
2023/24	503	20	523

2022/23	468	316	784
2021/22	357	147	504
2020/21	303	65	368
2019/20	344	199	543
2018/19	341	345	686
Total	2,316	1,092	3,408

Table 3.1: Affordable Housing Delivery

Current affordable housing delivery rates for the Greater Cambridge authority as a whole therefore have an average delivery rate of 568 affordable dwellings per annum over the period 2018/19-2023/24, which represents the most up to date information published by the Councils. These delivery rates are significantly below the identified affordable housing need required for the proposed plan period.

The spatial strategy within the emerging Local Plan is based on delivery of large-scale new settlements/urban extension sites. If any of these are subject to a delay, then affordable housing delivery will suffer. For example, Bourn Airfield has yet to deliver any affordable housing. Affordable housing therefore provides strong justification for utilising a higher housing need number, thus stimulating more affordable housing delivery. This is supported by Paragraph 024 (Ref:ID:2a-024-20190220) of the 'Housing and Economic Needs Assessment' section of the Planning Practice Guidance, which states the following:

*“An increase in the total housing figures included in the plan may need to be considered where it could help deliver the required number of affordable homes.”*

Within Appendix A of the Greater Cambridge Authority Monitoring report 2023 to 2024, it is noted that between 2011 and 2024, affordable housing constituted 34% of all housing completions within Cambridge City. If such levels were to continue in the upcoming proposed plan period, then Cambridge City could be expected to deliver 375 affordable dwellings per annum (34% of the standard method figure of 1,103 dwellings per annum). For South Cambridgeshire District, it confirms that or schemes eligible to provide affordable housing, 36% were affordable. Whilst this does not provide a true representation given the number of small-scale schemes that are not eligible, it would lead to an optimistic figure of 429 affordable dwellings per annum (36% of the standard method figure of 1,193 dwellings per annum).

Therefore, at current rates, only 804 affordable dwellings per annum would be delivered, a figure which in itself is a big increase on current delivery rates. The figure is significantly below the identified need

within the Housing Needs of Specific Groups in Cambridge and South Cambridgeshire August 2025 report.

It is considered there is clear justification to increase housing need in order to meet more of the identified affordable housing need across Greater Cambridge. Failure to increase overall housing numbers would result in increasing affordable housing demands within the authority area.

### **Summary**

A shortage of housing and employment space in this part of Greater Cambridge means we are missing key opportunities to cluster development at the most accessible locations, particularly those that can enhance and support existing key sectors, including a thriving technology ecosystem (AI, data science, software development), robotics, healthcare, and biomedicine near the CBC and other major employers. Delivering the right employment space and homes in the right location is critical. The government emphasises the importance of contiguous urban extensions to maximise the benefits of agglomeration, making growth in this location essential to support strategic clustering and meet future needs.

The site at South Trumpington can support this: it is a strategically accessible site, with no barriers to delivery, and is uniquely positioned to help Cambridge cement and strengthen its role as a European centre for technology development, innovation and life sciences, whilst offering the potential to deliver much needed homes close to high density employment clusters such as CBC, minimising need to travel.

A consideration of the above and acknowledgement of mandated national growth ambitions would ensure the emerging Local Plan is consistent with national policy as required by paragraph 36(d) of the NPPF.