

Cambridge Science Park

Technical Note – Alignment with S/NEC
North East Cambridge emerging policy

January 2026

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1. Key points

A key area to build upon for growth in Greater Cambridge

- 1.1 North East Cambridge (NEC) is now included within the Draft Cambridge Local Plan 2025, rather than taking forward a separate Area Action Plan (AAP).¹
- 1.2 Policy S/NEC in the Draft Cambridge Local Plan 2025 supports the redevelopment of NEC as a “comprehensive mixed use development”, bringing significant benefits by building on existing innovation hubs, including Cambridge Science Park (CSP), and “enabling them to evolve to meet future needs”.
- 1.3 The policy frames NEC as a district rooted in innovation and sustainability, delivered through intensification of commercial and industrial uses alongside new homes, civic space and supporting infrastructure.
- 1.4 The expansion of CSP to deliver additional employment floorspace would make a significant contribution to the objectives of this policy and to the Draft Cambridge Local Plan 2025 target of delivering 73,200 jobs by 2045.
- 1.5 The expansion would also bring a strong place-making offer including around 80 hectares of publicly accessible green space, biodiversity enhancements and new green routes.

Despite recognising its potential, growth in the area is potentially restricted

- 1.6 The policy specifies that NEC has capacity for 'up to 320,000 sqm (GIA) of additional business floorspace (Use Class E(g))'. However, it lacks a clear evidential basis for this figure, making it seem more like an arbitrary ceiling than a well-supported plan requirement.
- 1.7 The policy notes a number of ambitions for growth, including specifically drawing out CSP’s role in this:
 - “North East Cambridge (NEC) will be transformed into a thriving and inclusive new district that builds on the strengths of Cambridge’s existing innovation hubs including Cambridge Science Park, St John’s Innovation Park and Cambridge Business Park, while enabling them to evolve to meet future needs.”
 - “NEC is anchored by Cambridge Science Park, St John’s Innovation Park, and Cambridge Business Park, which drive the local and national innovation economy. Commercial development will be delivered through intensification of existing employment parks and mixed-use development around the district centre and local centres, including land adjacent to Cambridge North Station”
- 1.8 The capping of space at 320,000 sqm is in tension with the same policy’s direction of building on existing innovation hubs, including CSP, and “enabling them to evolve to meet future needs”.
- 1.9 A fixed cap essentially pre-defines future space needs, disregarding the rapidly changing requirements of R&D-driven firms and scale-ups.

¹ Retrieved from: <https://www.greatercambridgeplanning.org/>. Accessed January 2026

Flexibility matters

- 1.10 Policy 12a of the previous emerging NEC AAP set to cap the additional commercial floorspace provided at CSP at 60,000 sqm. This is not mentioned in the Policy S/NEC.
- 1.11 The Local Plan evidence base itself highlights why tight supply caps are risky in Cambridge's constrained market. Iceni notes that with low availability, observed absorption can be "suppressed", meaning take-up data may understate underlying need; it also reports market-signal roll-forwards for office and R&D space that are substantial and variable, reinforcing that the evidence points to ranges and uncertainty rather than a single fixed number.
- 1.12 In this context, restricting a prime innovation location to 320,000 sqm without a clear derivation or a flexibility mechanism risks hard-wiring under-supply, pushing growing firms out of the cluster and undermining the plan's stated ambition for NEC to drive innovation-led growth.

A well connected location should be supported

- 1.13 The policy frames NEC as one of the most sustainable locations, with strong public transport and active travel connectivity "the Councils evidence has shown that North East Cambridge is one of the most sustainable locations in Greater Cambridge. The site currently contains a mix of uses and is well served by public transport and active travel connections".
- 1.14 R&D is a particularly strong fit for that context: it benefits from clustering, can operate at higher densities, and is more compatible with a low-car accessibility strategy than more car-dependent employment models. In other words, if NEC is where growth should go, R&D-led growth at CSP is one of the most policy-aligned forms that growth can take.

Putting national objectives at risk

- 1.15 Greater Cambridge's innovation ecosystem and high-value sectors have long played a critical role in driving the UK's productivity and global competitiveness. However, in order for the region to sustain and enhance this position, continued growth is fundamental for several reasons:
- **Maintaining global competitiveness:** Cambridge's unique strengths in life sciences, AI, and semiconductor design have placed the region at the forefront of the UK's industrial strategy. To remain globally competitive in these rapidly evolving sectors, Cambridge must be able to attract new businesses, scale existing firms, and retain world-class talent. Failure to accommodate growth risks ceding ground to international rivals.
 - **Supporting the UK's economic and fiscal health:** Continued expansion of high-value industries will deliver a multiplier effect throughout the national economy, creating quality jobs, stimulating supply chains, and boosting exports. Constraining growth would limit these benefits and weaken the UK's overall economic resilience.
 - **Addressing emerging societal and technological challenges:** from clean energy and healthcare innovations to AI-driven productivity gains, the firms born in and attracted to Cambridge are developing critical solutions to today's biggest challenges. Growth in Cambridge's R&D-intensive sectors accelerates the pace at which new technologies and treatments can be translated into real-world impact.
 - **Reinforcing the Oxford-Cambridge Supercluster:** with the government's recognition of the Oxford-Cambridge Supercluster as a key growth engine, Cambridge's expansion is integral to maximising this strategic initiative. Achieving the full potential of the Supercluster – including the projected £25bn in additional GVA – depends on the ability of Cambridge to accommodate and integrate new businesses, research institutions, and collaborative ventures.

- 1.16 In short, continued growth in Cambridge is not only vital for the region's prosperity but is also integral to maintaining the UK's global leadership in knowledge-intensive industries. By ensuring that infrastructure, commercial space, and local skills align with rising demand, Greater Cambridge can remain a powerhouse of innovation, providing lasting benefits to both the local community and the wider UK economy.

The Proposed Development

- 1.17 The Proposed Development aims to approximately triple the amount of commercial floorspace at CSP across the Local Plan period of 2024-2045. This is an initial estimate and the exact total of commercial space that will be aimed for is still under internal review at this moment in time. Development of this scale would add thousands of additional jobs into Greater Cambridge economy, helping to meet growth aspirations.
- 1.18 The approach to the Proposed Development is explicitly mixed-use, with "intensification of commercial and industrial space alongside the provision of significant new housing and civic spaces", and a strong emphasis on ensuring growth is socially and economically inclusive. Other proposed supporting uses are include a gym, hotel, retail and other ancillary space.
- 1.19 It is acknowledged that such a level of growth will not happen overnight, and the Proposed Development at CSP is a long term vision for the complete redevelopment and intensification of CSP. In doing so, it will meet the future evolving needs of businesses, enabling it to remain at the forefront of the region's and country's economic growth.
- 1.20 CSP stands out from other sites in the Greater Cambridge pipeline for the following reasons:
- **Accessibility and location:** Cambridge Science Park is the UK's oldest science park and has driven innovation since the 1970s. It is a highly accessible location for sustainable growth, with strong existing and planned connections including the A14 / Milton Road corridor, Cambridge North railway station, the (consented) Waterbeach–Cambridge busway route, and the longer-term East West Rail programme supporting enhanced Oxford–Cambridge connectivity. CSP therefore has the potential to come forward with a robust transport strategy, aligning with the ambitions of Policy S/NEC.
 - **Addressing the scale-up gap:** Icen's *2024 Growth Sectors Study* identifies that around 40% of R&D space should serve scale-up businesses (typically 500–2,500 sqm), yet this segment remains acutely underprovided. CSP's scale creates an opportunity to deliver dedicated "grow-on" accommodation for expanding firms that might otherwise relocate out of the area, or be acquired before realising their full growth potential.
 - **Inclusive growth:** Cambridge's economic success has not been evenly shared. CSP can support a more inclusive growth model through targeted employment and skills programmes, affordable workspace where appropriate, and local procurement commitments to help ensure the benefits of development reach existing communities.
 - **Greater delivery confidence at the right time:** Wider Greater Cambridge supply is heavily dependent on scheme timing, delivery rates and build-out trajectories. Evidence indicates delivery has been limited in recent years, with some schemes more realistically coming forward post-2030. For example, the Council's 2024 trajectory indicates that completions in 2020–2023 totalled 73,363 sqm, while a significant share of future supply is phased later in the plan period. CSP offers a long-term proposition where space can be brought forward consistently over three phases, helping to maintain a growing supply of accommodation as the sector evolves.

2. Introduction

- 2.1 Volterra Partners LLP (“Volterra”) has been commissioned by Trinity College (“the Applicant”) to provide socio-economic support in developing proposals to expand Cambridge Science Park.

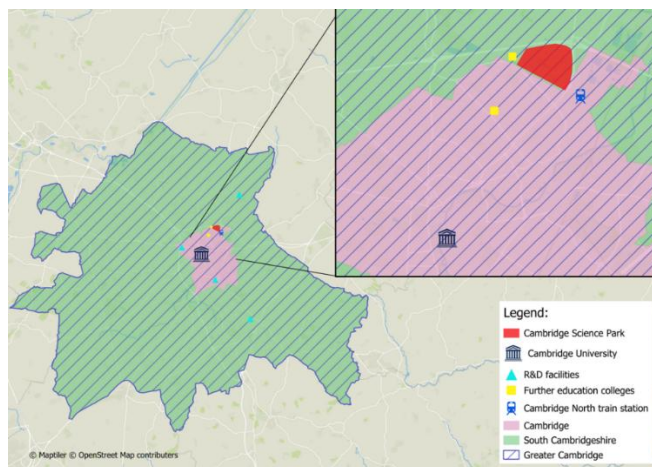
Description of the Proposed Development

Location

- 2.2 CSP is located to the north of Cambridge city centre, within the administrative area of South Cambridgeshire District Council. It sits adjacent to Milton Road (A1309) and is bordered by the A14 to the north and the Cambridge North transport hub to the east, providing strong road, rail, and cycling connections to the wider city and region. The Park forms part of the North East Cambridge area, a key focus for planned regeneration and employment growth, and is situated at the heart of one of the UK’s most significant clusters of knowledge-intensive activity.
- 2.3 The University of Cambridge is an anchor of innovation and knowledge within Greater Cambridge. Its main campus is located within a 15-minute drive of CSP. There are also further education colleges and major research and development (R&D) facilities surrounding the Site, as depicted in **Figure 1**.

Figure 1 — CSP is located within the North East Cambridge area

CSP in context



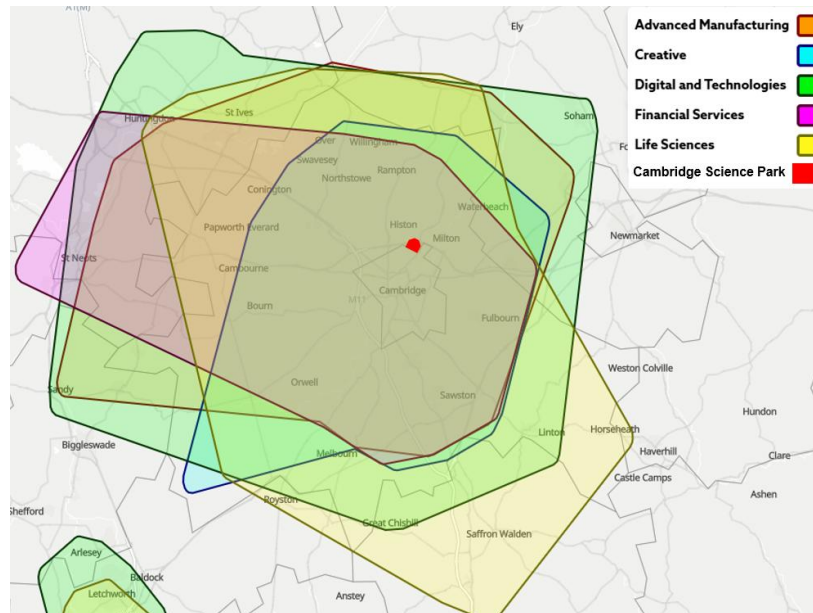
- 2.4 The Department for Science, Innovation and Technology (DSIT) has developed a map that visualises geographically concentrated clusters for each of the Industrial Strategy sectors.² A cluster for five of the eight Industrial Sectors cover the Site of the Proposed Development (**Figure 2**), demonstrating that the area is primed to support growth in these vital sectors.³

² Department for Business and Trade, 2025. Industrial Strategy; Source: Department for Science, Innovation and Technology, 2025. Innovation Clusters Map: summary and methods

³ Industrial Strategy sectors: Advanced Manufacturing, Creative, Digital and Technologies, Financial Services, Life Sciences

Figure 2 — CSP is at the heart of Industrial Sector clusters

DSIT Innovation Clusters Map, Industrial Strategy Sectors



Source: Department for Science, Innovation and Technology, 2025. Innovation Clusters Map

The Proposed Development

2.5 The development vision for CSP is as follows:

“To lead a vibrant and sustainable innovation neighbourhood in the City of Cambridge whilst contributing a thriving community of innovators that can drive outcomes with national and global impact.”

2.6 The Proposed Development would support the continued evolution of CSP by expanding high-quality employment floorspace and strengthening the on-site offer for workers, occupiers and visitors. In broad terms, it would comprise:

- A mix of laboratory and office accommodation, with flexibility to respond to changing occupier needs over time;
- Visitor and business facilities to support conferencing and collaboration, with the potential to accommodate a range of stay types;
- A network of supporting amenities and services at ground level (such as food and drink, retail and flexible workspace), focused on locations that best support the masterplan and the park’s public realm;
- Enhanced health, wellbeing and leisure provision, including both indoor and outdoor facilities integrated with the landscape;
- A range of flexible community and event spaces to support local activity, outreach and wider engagement;
- Dedicated learning and discovery space aligned with CSP’s science and innovation identity; and

- Family-supporting infrastructure, including childcare provision with appropriate outdoor space.

2.7 In doing so, the Proposed Development would seek to contribute to the following:

- 

1 *Lead the new innovation neighbourhood in North East Cambridge - harnessing CSP's historic and future success as a catalyst for inclusive growth to support the long-term prosperity of the local community.*
- 

2 *Curate a leading science and innovation ecosystem that encourages private industry, academia, and public agencies to combine and align around common purposes to solve society's biggest challenges.*
- 

3 *Develop an unrivalled 'growth infrastructure' that supports science, innovation, and commercialisation at scale.*
- 

4 *Create an inspiring, accessible urban environment which benefits from higher density, high quality sustainable urban design, green open spaces, and world class amenities.*
- 

5 *Be a global pioneer and leader in sustainability, having a long-lasting and positive impact on people and the environment.*

Purpose of the document

2.8 CSP sits inside the boundary of North East Cambridge (NEC). This area is now included within the Draft Cambridge Local Plan 2025, rather than taking forward a separate Area Action Plan (AAP).⁴

2.9 The previous AAP capped future development on CSP at 60,000 sqm. This is not mentioned in Policy S/NEC. This note assesses the implications of Policy S/NEC on the Proposed Development at CSP, and considers the role expanding CSP can have on meeting the objectives of the policy.

2.10 This note is structured as follows:

- **CSP alignment with strategic growth ambitions:** This section places CSP in the context of wider strategic objectives: national growth priorities in life sciences/technology, the Oxford–Cambridge Growth Corridor agenda, and the need for sufficient land supply in the right locations to support agglomeration and scaling.
- **CSP's role is recognised in policy ambitions:** This section summarises how Policy S/NEC explicitly positions Cambridge Science Park (alongside St John's Innovation Park and Cambridge Business Park) as an anchor of the innovation economy, and supports intensification and evolution of these hubs.
- **CSP potential is capped by a floorspace limit:** This section sets out how Policy S/NEC frames North East Cambridge as a major mixed-use growth location, but then applies an "up to 320,000 sqm (GIA)" additional business floorspace figure (plus 27,300 sqm industrial). It explains why the evidential basis for this cap is unclear, and why a fixed ceiling risks constraining a prime innovation location in a supply-constrained market (including delivery risk in the wider pipeline, phasing uncertainty, and the need for flexibility to respond to changing occupier requirements).

⁴ Retrieved from: <https://www.greatercambridgeplanning.org/>. Accessed January 2026

3. CSP expansion is aligned with strategic growth ambitions

National growth ambitions

- 3.1 Economic growth is the central objective of the UK Government's agenda, and life sciences and technology are explicitly identified as key engines of that growth. The 2025 Life Sciences Sector Plan describes the sector as "one of our greatest national assets" and highlights its potential to expand by around £41 billion (165%) by 2035, provided that barriers to investment, including planning and infrastructure constraints, are addressed.⁵
- 3.2 With the Government's recognition of the Oxford–Cambridge Supercluster as a key growth engine, Cambridge's expansion is integral to maximising this strategic initiative. Achieving the full potential of the Supercluster, including the projected £25bn in additional GVA, depends on Cambridge's ability to accommodate and integrate new businesses, research institutions and collaborative ventures.⁶
- 3.3 Greater Cambridge sits at the heart of the Oxford Cambridge Arc and is expected by Government to spearhead the UK's innovation economy. Cambridge and the Ox-Cam Growth Corridor is also specifically mentioned in the UK's new Industrial Strategy.⁷ In October 2025, the Government committed £400m to:

'kickstart development in Cambridge' – part of a wider half-billion package to transform the corridor into 'Europe's Silicon Valley'.⁸

- 3.4 National strategy envisions Cambridge doubling its economic output and becoming a global innovation hub. However, the EHEU 2025 which will underpin the forthcoming Local Plan projects a much more modest growth.

The central scenario of job growth in the emerging Local Plan period of 72,800 is much smaller than what more aspirational projections suggests. This conservative outlook means the plan could fall short of the Government's and Combined Authority's bold ambitions. If Cambridge's growth even partly approaches the higher national expectations, the currently planned employment land and floorspace would be insufficient to support it.

⁵ UK Government, 2025. The UK's Modern Industrial Strategy: Life Sciences Sector Plan

⁶ PublicFirst, 2025. Oxford-Cambridge Supercluster

⁷ UK Government, 2025. The UK's Modern Industrial Strategy

⁸ HM Treasury, 2025. Press release: Jobs, homes and better transport links for the Oxford Cambridge Growth Corridor

For instance, An Oxford Economics report commissioned by MHCLG (2025) sets out a baseline forecast for GC in which growth follows national and regional trends, with no additional local policy interventions.⁹ Under this baseline, jobs rise from around 236,000 in 2023 to about 321,000 by 2050. Alongside this, the report models three alternative growth scenarios (low, medium and high), which assume progressively larger uplifts in housing and commercial space: 100,000, 125,000 and 150,000 additional homes respectively, supported by 2m, 2.6m and 3.1m sqm of extra commercial floorspace. Under these scenarios, total employment in Greater Cambridge increases to between 380,000 and 465,000 jobs by 2050 (around 20% - 45% above the baseline, and up to almost double today's workforce), and significantly higher than the targets in the EHEU.

- 3.5 CSP is one of the most effective places to deliver this ambition. Greater Cambridge sits at the heart of the UK's innovation economy, leading in life sciences, AI, deep tech and other high-growth sectors that Government has identified as critical to future prosperity. The majority of firms at CSP operate in the IS8 sectors prioritised in the Industrial Strategy, meaning that additional space here translates directly into growth in those national priority industries.

Table 1 – CSP accommodates a diverse mix of knowledge-intensive and technology-driven businesses

CSP existing employment by sector

IS8 Sectors	Employment	Share
Digital & technologies	4,010	36%
Life sciences	3,210	28%
Creative industries	1,545	14%
Advanced manufacturing	820	7%
Clean energy industries	855	8%
Professional and business services	510	5%
Financial services	215	2%
AgriTech	110	1%
Public sector and charities	15	>1%
Total	11,290	100%

Source: Analysis produced internally by the wider project team; NB: IS-8 refers to the UK government's Industrial Strategy focus on eight high-growth sectors; Healthcare and Defence (IS-8) sectors are not represented within CSP

Aligning land supply with strategic growth ambitions

- 3.6 Both local and national policy point toward contiguous urban extensions of Cambridge as the preferred way to deliver sustainable, large-scale growth. The draft GC Local Plan (Regulation 18) notes that the area's nationally important economy justifies exploring higher employment (and housing) figures, and stresses the need to support economic growth and productivity through plan-making.¹⁰

⁹ Retrieved from: <https://www.gov.uk/>. Accessed January 2026

¹⁰ GCSP, 2025. Draft Greater Cambridge Local Plan 2024 – 2045

- 3.7 The UK Government's recent growth statement goes further: it emphasises that expanding Cambridge should involve:

“one or more contiguous urban extensions of the city... to maximise the benefits of agglomeration.”¹¹

- 3.8 Such contiguous extensions would be new districts on Cambridge's edge enable the clustering of labs, offices, and mid-tech premises near each other and near the talent pool of the city. This approach capitalises on agglomeration economies (sharing infrastructure, ideas and skilled labour), which are vital for an innovation hub.

- 3.9 Future development at CSP is as a chance to create a well-connected urban extension integrating R&D labs, mid-tech facilities and logistics space to support the wider innovation ecosystem. CSP reflects a broader principle that Cambridge's growth potential can only be unlocked with sufficient land delivery in the right locations.

A local plan that only meets the minimal “objectively assessed need” could leave no headroom for the extra growth Government and industry partners are actively seeking to stimulate.

¹¹ HM Treasury, 2025. Press release: Jobs, homes and better transport links for the Oxford Cambridge Growth Corridor

4. CSP's role is recognised in policy ambitions

Policy S/NEC recognises the role CSP has in delivering long term economic success

- 4.1 Policy S/NEC notes a number of ambitions for growth, including specifically drawing out CSP's role in the areas future growth prospects:

“North East Cambridge (NEC) will be transformed into a thriving and inclusive new district that builds on the strengths of Cambridge’s existing innovation hubs including Cambridge Science Park, St John’s Innovation Park and Cambridge Business Park, while enabling them to evolve to meet future needs.”

“NEC is anchored by Cambridge Science Park, St John’s Innovation Park, and Cambridge Business Park, which drive the local and national innovation economy. Commercial development will be delivered through intensification of existing employment parks and mixed-use development around the district centre and local centres, including land adjacent to Cambridge North Station”

Importance of growing in an established innovation location is recognised

- 4.2 NEC is positioned within the draft Local Plan as an established innovation location, “anchored by Cambridge Science Park, St John’s Innovation Park, and Cambridge Business Park”, which “drive the local and national innovation economy”. The policy direction is supportive of building on these assets through the “intensification of existing employment parks”, alongside mixed-use development around the district centre and local centres, including land adjacent to Cambridge North Station. This reinforces CSP’s role as part of a connected innovation district and supports a positive narrative around Science Park growth, underpinned by a proposal that provides a broad range of commercial accommodation alongside social value. However, this policy direction is difficult to reconcile with a fixed additional floorspace cap, which risks constraining CSP’s ability to evolve, intensify and respond to future business needs in the manner envisaged by Policy S/NEC.
- 4.3 The policy also makes clear that commercial growth must be supported by sustainable movement, noting that new development will “require enhancements to sustainable travel and adherence to the identified trip budgets”. CSP is well placed to respond to this direction through transport improvements shaped in collaboration with local communities, supporting walking, cycling and public transport use, and enabling growth in a way that aligns with the policy’s sustainability requirements.

- 4.4 Delivery is framed as needing to respond positively to economic cycles, technological change and climate change, requiring a comprehensive and coordinated approach to land development, infrastructure provision and management. CSP can support this through a clear, deliverable offer that combines employment growth with long-term community benefits, including high quality green infrastructure, and skills and education provision.
- 4.5 CSP stands out from other sites in the Greater Cambridge pipeline for the following reasons:
- **Accessibility and location:** CSP is the UK's oldest science park and has driven innovation since the 1970s. It is a highly accessible location for sustainable growth, with strong existing and planned connections including the A14 / Milton Road corridor, Cambridge North railway station, the (consented) Waterbeach–Cambridge busway route, and the longer-term East West Rail programme supporting enhanced Oxford–Cambridge connectivity. CSP therefore has the potential to come forward with a robust transport strategy, aligning with the ambitions of Policy S/NEC.
 - **Addressing the scale-up gap:** Icen's *2024 Growth Sectors Study* identifies that around 40% of R&D space should serve scale-up businesses (typically 500–2,500 sqm), yet this segment remains acutely underprovided. CSP's scale creates an opportunity to deliver dedicated "grow-on" accommodation for expanding firms that might otherwise relocate out of the area, or be acquired before realising their full growth potential.
 - **Inclusive growth:** Cambridge's economic success has not been evenly shared. CSP can support a more inclusive growth model through targeted employment and skills programmes, affordable workspace where appropriate, and local procurement commitments to help ensure the benefits of development reach existing communities.
 - **Longer term phased delivery:** Wider Greater Cambridge supply is heavily dependent on scheme timing, delivery rates and build-out trajectories. Evidence indicates delivery has been limited in recent years, with some schemes more realistically coming forward post-2030. For example, the Council's 2024 trajectory indicates that completions in 2020–2023 totalled 73,363 sqm, while a significant share of future supply is phased later in the plan period. CSP offers a long-term proposition where space can be brought forward consistently over three phases, helping to maintain a growing supply of accommodation as the sector evolves.

5. Policy S/NEC caps CSP's potential

The scale of the opportunity at CSP

- 5.1 The Proposed Development aims to approximately triple the amount of commercial floorspace at CSP across the Local Plan period of 2024-2045. This is an initial estimate and the exact total of commercial space that will be aimed for is still under internal review at this moment in time. Development of this scale would add thousands of additional jobs into Greater Cambridge economy, helping to meet growth aspirations.
- 5.2 The approach to the Proposed Development is explicitly mixed-use, with “intensification of commercial and industrial space alongside the provision of significant new housing and civic spaces”, and a strong emphasis on ensuring growth is socially and economically inclusive. Other proposed supporting uses are include a gym, hotel, retail and other ancillary space.
- 5.3 It is acknowledged that such a level of growth will not happen overnight, and the Proposed Development at CSP is a long term vision for the complete redevelopment and intensification of CSP. In doing so, it will meet the future evolving needs of businesses, enabling it to remain at the forefront of the region's and country's economic growth.

NEC is identified as a major driver of growth, but current policy caps the ambition

- 5.4 Policy S/NEC supports the redevelopment of North East Cambridge (NEC) as a “comprehensive mixed use development”, bringing significant benefits by building on existing innovation hubs, including Cambridge Science Park, and “enabling them to evolve to meet future needs”.
- 5.5 The policy frames NEC as a district rooted in innovation and sustainability, delivered through intensification of commercial and industrial uses alongside new homes, civic space and supporting infrastructure.
- 5.6 The Proposed Development aligns with this direction by supporting the growth and evolution of an identified key asset, while also bringing a strong place-making offer.
- 5.7 However, Policy S/NEC caps the ambitions by allowing only “up to 320,000 sqm (GIA) of additional business floorspace (Use Class E(g))” by 2045.
- 5.8 It is not clear how the 320,000 sqm additional floorspace cap has been derived. This constraint would limit the scale of future growth at CSP, despite the site's potential to expand beyond this level.
- 5.9 This is significant in the context of the Employment and Housing Evidence Update 2025 (EHEU 2025), where Icen identifies a need for approximately 600,000 sqm of R&D floorspace and 302,600 sqm of office floorspace across Greater Cambridge.
- 5.10 Capping the development in NEC risks constraining the ability of the wider area to meet identified employment land requirements.

- 5.11 This is especially relevant for R&D and lab-enabled office space in Greater Cambridge, where firms often need to co-locate, adapt, and scale rapidly. Where suitable space is not available, businesses are more likely to relocate or expand elsewhere, undermining the strength of the cluster and the delivery of growth objectives.
- 5.12 CSP alone has the potential to deliver approximately 20,000 additional jobs on site. While detailed phasing and delivery timescales are still under development, a substantial proportion of this growth is expected to come forward within the emerging Local Plan period. This would represent a significant contribution to the Draft Greater Cambridge Local Plan 2045 central scenario target of 72,300 jobs.

Restricting supply in this location could put growth across wider Greater Cambridge at risk

- 5.13 Restricting development is an area of great potential could put growth across Greater Cambridge at risk. The 2025 EHEU provides a trajectory of employment floorspace commitments as of April 2024 across Greater Cambridge, based on a comprehensive review of planning permissions and local plan allocations.¹² This included key sites such as Cambridge East, Cambridge Biomedical Campus, North East Cambridge, and Babraham. **Table 2** summarises the demand and supply balance presented in the 2025 EHEU, confirming a positive balance of supply for office and R&D space, but a shortfall regarding industrial space.

Table 2 – IcenI identify a positive balance of supply for office / R&D space, however a shortfall for industrial space

Needs / supply floorspace balance (sqm)

Use	Need (2024 – 2045)	Net supply (as of 2024) including losses / commitments	Supply (assigned to main categories)	Balance
Office	303,000	117,000	337,000	35,000
Office / R&D	-	320,000	-	-
R&D	600,000	547,000	707,000	107,000
Industrial	317,000	29,000	29,000	-288,000
Total	1,219,600	1,073,000	1,073,000	-147,000

Source: IcenI, 2025. Greater Cambridge Employment and Housing Needs Update

- 5.14 However, despite supply being positive on the face of it, there are several risks and uncertainties that mean not all consented space will materialise as projected:
- Permitted schemes facing delays:** The Council's Office and Laboratory Employment Trajectory (2024) shows that many of these schemes face material delivery risks.¹³ The trajectory document confirms that "commitments include sites that have planning permission for employment uses and/or have been allocated for employment uses," including "approvals subject to S106 agreements and those applications currently held up by Environment Agency objection." This results in a large gap between permissions and what is onsite. The Council's Annual Monitoring Report records 267,497sqm of office

¹² IcenI, 2025. Greater Cambridge Employment and Housing Needs Update

¹³ Greater Cambridge, 2024. Office and Laboratory Employment Trajectory

and R&D space with full or reserved matters consents at March 2024, yet only 51,211 sqm or 19% was under construction.¹⁴ In other words, not all permissions counted as commitments are capable of being delivered in the short term.

- **Phasing and post-2030 delivery:** The Growth Sectors Study (2024) that underpins the EHEU 2025 notes that relatively little new lab space was actually delivered between 2020-2023, even as demand surged.¹⁵ Many of the pipeline projects are slated for 2025-2030, but “some schemes may more realistically be brought forward post-2030”. In other words, a chunk of the supply is likely to come later in the plan period, potentially leaving near-term needs unmet.
- **Changing plans and uses:** Many commitments are in outline or flexible-use form. This means the eventual mix of office versus lab space can shift. The Council’s own study cautions that proposed developments can change upon reserved matters and market conditions, “inevitably the categorisation of proposals involves professional judgement and it is of note that proposals can change, particularly where applications are outline or for E(g) or B1 mixed components”.¹⁶ For instance, a site earmarked as “office / R&D” may deliver more lab space if that’s what investors prefer, or could be delayed if market sentiment cools. This fluidity means the quantum and type of floorspace delivered might diverge from the current assumptions, and leave an undersupply in some of the subcategories of space.
- **Market and viability factors:** High construction costs, infrastructure requirements, or economic downturns could affect whether developers build out all the space they have permission for. A nominal surplus of permitted floorspace does not guarantee occupiers will have space when needed if developers phase construction or shelve projects. The 2025 EHEU’s acknowledgment that additional space will likely be required in the 2030s despite today’s pipeline underlines that the pipeline must not only exist but be deliverable in a timely manner to truly meet demand.¹⁷

- 5.15 In addition to the identified need for new supply, there are also structural issues within the existing commercial stock that must be addressed.
- 5.16 A key challenge to meeting the need for office, R&D and lab space is the outdated nature of the existing commercial stock. While the region has seen considerable expansion in its commercial space over the years, much of the available supply consists of older, less desirable properties that fail to meet the needs of modern occupiers, particularly those in R&D and life sciences.
- 5.17 Approximately 70% of Greater Cambridge’s commercial space was built before 2000, and these properties have the highest availability rates.¹⁸ Market reports highlight a “flight to quality” in Cambridge’s commercial real estate. Take-up activity is concentrated on Grade A office and new lab developments such as One Cambridge Square, while older or secondary buildings record higher availability and are less attractive to occupiers seeking modern, high-spec R&D and office space.¹⁹
- 5.18 The preference for modern, high-quality spaces highlights the inadequacy of the existing stock. Businesses seeking state-of-the-art labs, R&D space and offices often struggle to find suitable options, as availability is primarily concentrated in older buildings that are no longer fit for purpose. The shortage of premium facilities is particularly critical for R&D occupiers, who require cutting-edge infrastructure to support their activities.

¹⁴ Cambridge City Council and South Cambridgeshire District Council (2025), Annual Monitoring Report for Greater Cambridge covering the period 1 April 2023 – 31 March 2024. Appendix 2 has tables and charts which breaks down the figures.

¹⁵ Icen Projects, 2024. Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs

¹⁶ Icen Projects, 2024. Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs

¹⁷ Icen Projects, 2025. Greater Cambridge Employment and Housing Needs Update 2024-2045

¹⁸ CoStar, 2025.

¹⁹ Savills, 2024. Spotlight: Good growth for Cambridge

- 5.19 As a result, supporting continued growth in Greater Cambridge will require the delivery of high-quality new space at scale, alongside the ability to respond flexibly to evolving occupier needs and market conditions.
- 5.20 In this context, restricting growth in a strategically significant location to 320,000 sqm of additional floorspace risks limiting that flexibility, and may constrain the area's ability to deliver the quantum and type of employment space required over the plan period.



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