Cambridge Science Park North

Response to Regulation 19

September 2026

Trinity College (CSP) Limited

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1. Executive summary

1.1 Volterra's 2026 Technical Note applies a suppressed-demand assessment to Greater Cambridge's industrial market. It identifies a need for between 420,000 sqm and 525,000 sqm of industrial floorspace, compared with the Council's identified requirement of 317,000 sqm. The range recognises that historic take-up can understate need where businesses have deferred investment, taken unsuitable premises, or relocated elsewhere because appropriate space was not available.

1.2 Suppressed demand is capable of being a material planning consideration where it is transparently evidenced and tested against wider market indicators. Recent decisions at Hichingbrooke, Thrapston, Theale and the Beehive Centre demonstrate that decision-makers have given weight to evidence of unmet demand and the distinction between theoretical and deliverable supply.

1.3 Iceni notes that suppressed-demand calculations should be considered at a FEMA level. It states that this should comprise Cambridge, South Cambridgeshire, East Cambridgeshire, Fenland, Huntingdonshire and Peterborough. However, Iceni adopts a different approach in other reports, such as Hinchingbrooke Logistics Park and Newlands Park A1, where it treats Huntingdonshire and Peterborough as a single FEMA geography, while noting that Huntingdonshire could be considered a FEMA in its own right. It also calculates suppressed demand at this level. As such, it is not clear why suppressed demand cannot be assessed at the Greater Cambridge level.

1.4 The market evidence published since Volterra's January 2026 Technical Note points to continued constraint. Bidwells reports 1.4 million sq ft of occupier requirements at mid-2026, against availability of 5.6%, below the 8% level generally associated with a well-functioning market. Industrial take-up in the first half of 2026 was the highest for four years, while mid-tech take-up increased by 35% year-on-year. This reinforces the case that demand for industrial and mid-tech space remains strong and that some demand may still be suppressed by the limited availability of suitable premises.

1.5 The Council's evidence identifies 34,652 sqm of potential E(g)(iii) supply, broadly comparable with its indicative 10% allowance for mid-tech space. However, this should not be treated as confirmed, deliverable mid-tech capacity. E(g)(iii) is a flexible use class, not a guarantee of mid-tech occupation, and WISN identifies around 15,000 sqm of the identified supply as uncertain in its suitability for mid-tech uses. The evidence also does not provide confidence that this pipeline could respond flexibly if demand exceeds the Council's assumed 10% share identified for mid-tech.

1.6 In light of the positive market evidence since WISN 2025, the Plan should retain sufficient capacity at suitable and deliverable locations to meet growth in mid-tech alongside wider industrial and logistics demand. CSPN can provide around 120,000 sqm of industrial and mid-tech floorspace. Its location adjacent to Cambridge Science Park provides access to the Strategic Road Network, Cambridge North station and the wider north Cambridge innovation cluster. It therefore responds directly to WISN's recommendation for an additional mixed industrial and technology location with close links to Cambridge.

2. Introduction

2.1 This response addresses the Council's Regulation 19 Development Strategy Topic Paper, Appendix 9 (the "Topic Paper"), specifically the entry for Land north of A14 and south of Milton Road, Impington, known as Cambridge Science Park North ("CSPN"), at paragraphs 2.24 to 2.36. It also addresses paragraphs 2.17 to 2.23, where the Council sets out its general position on suppressed demand and the mid-tech allocation in response to a different site (Land at South Trumpington), because the same reasoning is applied against CSPN.

2.2 The Topic Paper restates the 317,000 sqm, however, does not respond in detail to the suppressed demand modelling shared by Volterra that suggests a need of between 420,000 sqm and 525,000 sqm.

2.3 Instead, the Topic Paper, Appendix 9 notes that*: "The requirement for the industrial and warehousing space (317,000 sqm, rising from 200,000 sqm in previous work) has been developed considering a range of factors which are compliant with the Government's planning practice guidance and take a very positive approach to industrial needs. The finer grain interpretation of specific technical adjustments is a matter of professional judgement to be considered on a case by case basis. This includes the case for (amongst others things) Suppressed demand and historic market equilibrium. This issue is considered in the EHNU 2025 p56/57."*

2.4 Page 56/57 of the Employment and Housing Needs Update 2024-2045 (EHNU) states that *"It is not clear that calculating suppressed demand aligns to the planning practice guidance in the same way as labour demand, supply and past take up models (see PPG Reference ID: 2a-027-20190220). However, Iceni Projects does recognise the value in considering the effects of suppressed demand (see for example Iceni's West Midlands Strategic Employment Sites Study 2024). Such calculations which would normally be applied at a full property market area or functional economic market area (FEMA) level to understand the market interactions. As noted in the Greater Cambridge Employment Land and Economic Development Evidence Study 2020 p16, the FEMA is reported as including: Cambridge; South Cambridgeshire; East Cambridgeshire; Fenland; Huntingdonshire; and Peterborough. For the industrial market this FEMA area includes districts with considerable presence of strategic large scale industrial units which are not present in Greater Cambridge, which distorts the picture. The Greater Cambridge specific industrial need has been explored in the Greater Cambridge Warehouse and Industrial Space Needs 2025, which is included in the needs figure in this paper."*[1]

2.5 It is accepted that best practice would see that suppressed demand is considered at the FEMA. However, two points of contention with the above:

- There is still value in considering suppressed demand at the Greater Cambridge geography, given its vast strategic importance. In their evidence on Huntingdonshire, Iceni say that the FEMA consists of Huntingdonshire and Peteborough – a direct subset of the area mentioned above. It is not clear how this constitutes a FEMA but Greater Cambridge does not.
- It is not clear, in the 2025 Greater Cambridge Warehouse and Industrial Space Needs Study (WISN 2025), how exactly suppressed demand has been included. It is therefore maintained that the figures presented by Volterra stand.

2.6 As well as the pushback on suppressed demand, the Council's case against the scale of CSPN rests on the following grounds:

- A selective reading of stakeholder engagement in the Warehouse and Industrial Space Needs study to suggest demand is muted;

[1] Greater Cambridge, 2026. Employment and Housing Needs Update

- A contention that the 10% mid-tech allocation is proportionate because market forces can be left to deliver more mid-tech space within the wider industrial allocation if required; and
- That there is adequate pipeline supply for mid-tech use.

2.7 The document restates the economic arguments in favour of expansion at CSPN, and outlines why the current spatial requirements identified in the Employment and Housing Needs Update risk missing out on growth in key sectors associated with the mid-tech sector.

3. The need for mid-tech space in Greater Cambridge

Suppressed demand

3.1 The Volterra 2026 Technical Note applies suppressed demand modelling to the Greater Cambridge industrial sector, and finds that the need should be considered between 420,000 sqm and 525,000 sqm.[2] This is an increase from the 317,000 sqm of need reported by Iceni in the 2025 Employment and Housing Evidence Update.

3.2 The range provides a realistic allowance for demand that may not be visible in historic take-up data because suitable space has not been available. This is important in an industrial market where occupiers can defer, displace or relocate investment when the right type, size or location of premises cannot be secured.

3.3 While page 56/57 of the 2025 Employment and Housing Evidence Update does reference suppressed demand, there is no clear adjustment in the modelling to allow for its impact. This risks reproducing the constraints that limited development in past years.

3.4 Recent decisions demonstrate that suppressed demand can be a material consideration where it is evidenced transparently and tested against wider market data:

- Land east of Halden's Parkway, Thrapston, North Northamptonshire, appeal ref. APP/M2840/W/25/3362393, allowed on 22 October 2025. The Inspector considered competing evidence on logistics need, including a suppressed-demand assessment. The Inspector found that the approach was not flawed, accepted that vacancy must be accounted for as a key market signal, and concluded that there was significant unmet logistics need along the A14 corridor which the scheme would help to meet. The appeal was allowed for B8 development.[3]
- Land to the North of the A4, Theale – Savills have produced an evidence-based and objective overview of the need for new industrial and logistics space within the Thames Valley Berkshire LEP and in West Berkshire specifically. When factoring in suppressed demand results show the need for space in West Berkshire to be between 69 ha and 93 ha of land over the 19-year plan period, as opposed to 42 ha stated in the ELR.[4] This scheme went to Inquiry in June 2025 and received approval.
- The Beehive Centre, Cambridge, called-in application ref. APP/Q0505/V/25/3360616, approved on 9 December 2025. This was not an industrial scheme, but it is directly relevant to Greater Cambridge. The Inspector found that there was likely to be suppressed demand for office and laboratory space, alongside a gap between theoretical supply and deliverable supply. The Secretary of State agreed with the Inspector's conclusions and granted permission, giving significant weight to economic growth and employment benefits. The case illustrates the practical point: an apparent pipeline of floorspace does not, by itself, demonstrate that the market has a sufficient supply of deliverable and suitable accommodation.[5]

3.5 These decisions do not establish a rule that suppressed demand must always be added to an employment land requirement. The Warrington Local Plan examination found that quantifying suppressed demand

[2] Volterra, 2026. Cambridge Science Park North: Technical Note – Greater Cambridge Employment Land Need

[3] Retrieved from: https://acp.planninginspectorate.gov.uk/, Accessed September 2026

[4] Savills, 2025. Land to the North of the A4, Theale – Industrial & Logistics Needs Assessment. Available at: LINK

[5] Retrieved from: https://acp.planninginspectorate.gov.uk/. Accessed September 2026

involves assumptions and requires careful testing, particularly where the analysis relies on rental growth, vacancy rates and net absorption.[6]

3.6 The appropriate response is not to rely on a single modelled figure. It is to consider a transparent range, triangulated against vacancy, rents, take-up, occupier requirements, the quality and deliverability of supply. The range of 420,000 sqm to 525,000 sqm provides that evidence-led basis for flexibility.

3.7 In the Topic Paper, Iceni state at paragraph 2.9 that Volterra did not take forward a suppressed demand model in the Huntingdonshire EENA. This does not provide a full account of our approach. In that instance, we tested suppressed demand using a range of alternative models. The resulting estimates fell within the recommended range generated by our wider assessment. It was therefore not necessary to adjust the recommended need range further on the basis of suppressed demand alone.

3.8 This approach is consistent with our treatment of suppressed demand in the Greater Cambridge assessment. Given the inherent uncertainty in estimating suppressed demand, we presented a range of scenarios rather than relying on a single estimate. In Greater Cambridge, the suppressed demand scenarios indicate a need for between 420,000 sqm and 525,000 sqm of additional employment space. This is materially above the policy figure of 317,000 sqm and does not fall within the range identified by Iceni.

3.9 The comparison with Huntingdonshire therefore does not demonstrate an inconsistency in our approach. In both cases, we have considered suppressed demand as an important sensitivity and have assessed its implications alongside the wider evidence base. The difference is that, in Huntingdonshire, the suppressed demand estimates were consistent with the recommended range, whereas in Greater Cambridge they point to a substantially higher level of need).

3.10 Iceni further state in the Topic Paper that Greater Cambridge is not, in their view, a FEMA (see **paragraph 2.4**). They instead identify a wider geography comprising Cambridge, South Cambridgeshire, East Cambridgeshire, Fenland, Huntingdonshire and Peterborough, and suggest that suppressed demand would normally be assessed at that level.

3.11 National policy guidance does not support the use of a single, predetermined geography in all circumstances. The Planning Practice Guidance states that there is “no standard approach” to defining a FEMA.[7] It requires authorities to identify the most appropriate geography for the matter being assessed, taking account of factors such as travel-to-work patterns, administrative areas, the transport network and the flow of goods, services and information. It also recognises that authorities may work in different groupings to address different strategic matters. The relevant test is therefore one of best fit, not whether the study area corresponds with a single, fixed FEMA used for every sector and purpose.

3.12 This distinction is particularly important here. The geography of a market should reflect the occupiers and premises being assessed. A national or regional distribution centre may search across a wide strategic road corridor. A mid-tech business requiring access to Cambridge’s skilled labour, science parks, research base and supply chains is likely to have a materially narrower search area. Floorspace in Peterborough or Fenland cannot simply be assumed to be an effective substitute for space close to Cambridge.

3.13 Iceni's own past work confirms this. It shows that suppressed demand is routinely assessed at geographies narrower than a fixed, multi-authority FEMA, depending on the sector in question:

- In their work for Hinchingbrooke Logistics Park, Iceni discuss that there are lots of potential FEMAs and ultimately decide *"Huntingdonshire and Peterborough are used as a single geography"* (para 3.31 for

[6] Retrieved from: ID43 - Warrington LP Inspectors' Report - FINAL.pdf. Accessed September 2026

[7] Retrieved from Plan-making - GOV.UK. Accessed September 2026

the purposes of the industrial market and their suppressed demand analysis.[8] Iceni further note, in previous iterations of the report, that Huntingdonshire could be considered a FEMA in its own right, "*Under the broader FEMA definition Huntingdonshire could be considered as a single entity or one that is well connected to a number of other places such as Peterborough and Greater Cambridge as part of the Combined Authority Area*".[9]

- The same approach was taken in their work on Newlands Park: *"Huntingdonshire and Peterborough are used as a single geography for analyses in this report."*[10]

3.14 In both cases, suppressed demand was calculated at the Huntingdonshire and Peterborough level and carried forward into the recommendation of future floorspace needs: "T*his has been tested against a suppressed demand model, the trend based rates exceeding the suppressed demand model at a 5% sensitivity but falling short of an 8% sensitivity. A growth scenario for more ambitious economic investment would reflect the stretch target of achieving 8% suppressed demand testing. The industrial market based scenarios are therefore of 1.57 million sqm and growth scenario need of 2.51 million sqm"*[11]

3.15 The resulting need was then apportioned back to Huntingdonshire alone, by reference to its existing stock. Need is given significant weight in the committee, referencing this work directly: *"Using market-based modelling (completions, absorption, suppressed demand), the report asserts that there is an Industrial Market Area Need (Huntingdonshire + Peterborough) to 2046 of between 1,570,000sqm and 2,510,000sqm of large-unit floorspace. Apportioning that need to Huntingdonshire alone based on existing stock patterns would suggest a need of between 638,000sqm (baseline scenario) and 1,028,000 sqm (growth scenario).Current supply identified as relevant pipeline space does not exceed 45,000 sqm, giving a modelled shortfall of between 593,000sqm (baseline) and 983,000sqm (growth). The clear conclusion that can be drawn from this evidence is that a substantial release of new employment land is urgently required. This is considered to carry significant weight".*[12]

3.16 The above shows that:

- Iceni do not apply a single, fixed FEMA within their work. The geography changes with the sector and the question being asked; and
- A wider market assessment can inform, rather than prevent, analysis and conclusions at a smaller geography.

3.17 It is therefore not accepted that the use of Greater Cambridge invalidates the suppressed demand analysis. Greater Cambridge is the plan area, it exhibits a high degree of economic self-containment similar to that of Huntingdonshire (Iceni note that 81.7% of jobs in Huntingdonshire are taken by people residing there,[13] while the same figure for Greater Cambridge is 79.3%)[14] and it is the geography within which the shortage of premises and the resulting planning response must be understood. Most importantly, it reflects the locational requirements of the mid-tech and locally serving industrial occupiers being assessed.

[8] Iceni, 2025. Hinchingbrooke Logistics Park - Huntingdonshire Employment Land Needs Assessment. Final Report. Paragraph 3.31. Retrieved from: https://docs.huntingdonshire.gov.uk/

[9] Iceni, 2024. Hinchingbrooke Logistics Park – Huntingdonshire Employment Land Needs Assessment: Final Report.

[10] Iceni, 2024. Newlands Park A1M – Huntingdonshire Employment Land Needs Assessment. Final Report

[11] Iceni, 2025. Hinchingbrooke Logistics Park - Huntingdonshire Employment Land Needs Assessment. Final Report. Retrieved from: https://docs.huntingdonshire.gov.uk/

[12] Huntingdonshire Development Management Committee, 2026. Newlands Property Developments Ltd. Available at: OFFICER REPORT

[13] Iceni, 2024. Hinchingbrooke Logistics Park – Huntingdonshire Employment Land Needs Assessment: Final Report

[14] ONS, 2021. Census

Mid-tech allocation

3.18 The Topic Paper states at paragraph 2.22 that mid-tech is not a discrete use class. It overlaps with wider industrial and R&D activity, so its quantification is necessarily uncertain. On that basis, the Council considers that a circa 10% share within the wider industrial requirement is a proportionate allowance, avoiding the risk of double counting demand included elsewhere.

3.19 It is not disputed that mid-tech overlaps with the wider industrial and R&D activity. As our January 2026 Technical Note explains, mid-tech premises are hybrid workspaces at the intersection of R&D, life sciences and advanced manufacturing.[15]

3.20 However, the principal issue is not whether mid-tech can be precisely separated from other employment uses. It is whether the proposed 317,000 sqm allocation provides a realistic and sufficiently flexible basis for meeting mid-tech need alongside demand from other industrial sectors.

3.21 Paragraph 2.34 of the Topic Paper suggests that no specific provision is needed because the Council would not control the final occupier mix within the 317,000 sqm allocation. It states that the allocation could accommodate a higher proportion of mid-tech space than the notional 10% allowance, subject to market forces:

3.22 *"Table 7.5 of the Iceni 2025 Industrial Space Needs creates a notional need by type but in reality across the substantial 317,000 square metres the LPA would not control the final occupier mix that could include a higher proportion of mid tech space subject to market forces."*

3.23 This assumes that the 317,000 sqm is sufficiently broad in locational and typological terms to respond to changing demand. The evidence does not support that assumption. WISN identifies distinct requirements for mid-tech occupiers, including:

- Strong connectivity to the labour market;
- Proximity to the urban fringe or to science parks; and
- A higher-quality amenity offer than is generally required by industrial and distribution occupiers[16]

3.24 These requirements affect where suitable premises can be provided. A strategic distribution location may be well suited to logistics activity, particularly where it benefits from access to the Strategic Road Network, but may not meet the requirements of businesses which depend on access to Cambridge's skilled labour market, research institutions and established science and technology clusters.

3.25 This matters because the 317,000 sqm allocation would need to accommodate several forms of demand at once. WISN's recommended distribution of need indicates that 40% of requirements relate to distribution uses.[17] If logistics and general industrial demand grow strongly, those uses could absorb a substantial share of the available land and floorspace, particularly at sites with Strategic Road Network access. There would then be no mechanism to ensure that sufficient suitable capacity remains for mid-tech activity.

3.26 This creates a risk that mid-tech need is lost within a single aggregate figure. The question is not whether a future occupier could, in principle, take mid-tech space somewhere within the 317,000 sqm total. The question is whether the plan identifies enough land in the right locations, and with the right characteristics, to accommodate mid-tech growth if logistics and other space-intensive sectors also perform strongly.

[15] Volterra Technical Note, January 2026, para 1.1

[16] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Table 0.2 and para 5.20

[17] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Table 0.3

3.27 A general allocation cannot be assumed to provide this safeguard. Land allocated and brought forward for distribution or conventional industrial development will respond to the requirements of those markets. It is unlikely to be repurposed later for mid-tech premises where the location, surrounding environment and amenity offer do not meet mid-tech occupiers' requirements. The relevant markets may overlap in use-class terms, but they do not necessarily compete for the same sites.

How does the industrial market look in 2026

3.28 The Volterra January 2026 Technical Note reported CoStar data showing that light industrial vacancy in Greater Cambridge had remained below 8% in every year since 2009, while general industrial vacancy had remained below 8% in every year since 2011.[18] It also cited the Cambourne Growth Strategy Programme Economic Study, prepared by Arup for the same evidence base, which reported industrial vacancy of 2.4%. Arup described this as *"considerably lower than the level expected in a well-functioning market".*[19]

3.29 Bidwells' industrial-specific evidence similarly identified a market in which demand materially exceeded available supply. Its 2025 Cambridgeshire Industrial Databook recorded 1.6m sq ft of demand for industrial and mid-tech space, against annual take-up of 317,000 sq ft in 2024. It also reported five-year rental growth of 81% for prime mid-tech space, compared with 37% for standard prime industrial space.[20] The stronger rental growth in the mid-tech segment is consistent with a particularly acute imbalance between demand and suitable supply.

3.30 The Council's June 2026 'Review of economic data, context and representations' reports some improvement in general vacancy, stating that *"vacancy headroom (and margin) is assumed in the models... with upwards of 7% showing in all markets at May 2026"* (paragraph 5.21). This figure does not demonstrate that the industrial market is functioning without constraint. A vacancy rate of around 7% remains below the 8% equilibrium threshold applied elsewhere in the evidence base, including in the Council's EHEU work, as the level at which occupiers can reasonably relocate, expand or enter the market. A modest easing after a prolonged period of sub-8% vacancy is evidence of continuing constraint, not resolved undersupply.

3.31 The most recent industrial market evidence reinforces that conclusion. Bidwells' 'Cambridge Industrial Databook', published in August 2026, reports that the market continued to perform strongly in the first half of 2026, driven by *"robust occupier demand and constrained supply"*:[21] It is further noted that:

- Industrial take-up reached 220,900 sqft in the first half of the year, its highest level for four years, with a further 63,000 sqft under offer.
- By mid-2026, occupier requirements totalled 1.4m sq ft, while availability stood at 5.6%. This is materially below the 8% equilibrium benchmark and points to a continuing mismatch between the space sought by occupiers and the space available to them.
- There is a serious shortage of larger units.

3.32 These strong market indicators for mid-tech are further reinforced by 2026 findings from DTRE:

- Lab and mid-tech take-up reached 312,100 sq ft in the first half of 2026, up 35% year on year.[22] Mid-tech space accounted for 88% of Cambridge take-up, driven largely by the current defence

[18] Volterra Technical Note, January 2026, paragraph 5.9, citing CoStar, 2026

[19] Volterra Technical Note, January 2026, paragraph 5.10

[20] Volterra Technical Note, January 2026, paragraphs 5.11 to 5.12

[21] Bidwells, 2026. Cambridge Industrial Databook

[22] Retrieved from: Science & Technology Golden Triangle Market Report - H1 2026. Accessed September 2026

environment, which has led occupiers to expand.[23] This may continue if the Government increases its defence-spending target to 3.5% of GDP by 2035.[24]

- Earlier in 2026, DTRE also recorded an 80,000 sq ft mid-tech letting at Bourn Quarter, with a further 70,000 sq ft under offer to a drone detection business.[25] This demonstrates active demand from advanced manufacturing and technology businesses requiring industrial-type accommodation, rather than conventional offices or wet laboratories.

3.33 The latest available evidence shows that demand for industrial and mid-tech space remains substantial, availability remains below a level associated with a well-functioning market, and the shortage is especially acute for larger units capable of accommodating growing technology and advanced manufacturing occupiers.

[23] Retrieved from: Science & Technology Golden Triangle Market Report - H1 2026. Accessed September 2026

[24] Retrieved from: https://www.telegraph.co.uk/. Accessed September 2026

[25] Retrieved from: Science & Technology Report: Golden Triangle - Q1 2026. Accessed September 2026

4. Stakeholder evidence

4.1 Paragraph 2.33 the Topic Paper states: *"in preparing that report Iceni visited a number of mid tech occupiers to further understand the requirements and spoke to a range of stakeholders. The views on the need for mid-tech space were mixed, see paragraph 5.9, including much more muted requirements".*

4.2 WISN paragraph 5.9 does state that engagement findings were mixed: *"some stakeholders see a rapidly expanding demand but others identifying much more muted requirements"* (WISN 2025, para 5.9). The same paragraph goes on to note that mid-tech space is comparatively under-provided in Cambridge relative to Oxfordshire, where *"this type of space is more commonly sought and better provided for"*, citing Harwell Science and Innovation Campus and Milton Park as more developed comparators (WISN 2025, para 5.9).

4.3 The wider body of stakeholder evidence within the same report points consistently towards constraint rather than absence of demand. WISN records that:

- VC-funded mid-tech firms *"can't afford to hang around with funding rounds or prioritise their dream sites, they just have to go with what's available"* (WISN 2025, para 5.10);
- Companies including Cambridge Medical Robotics (who have taken space at Evolution Business Park, adjacent tland to CSPN)[26] and Paragraf have left Cambridge Science Park for want of suitable premises (WISN 2025, para 5.25); and
- Unfulfilled demand from mid-size and larger manufacturers could readily add a further 50,000 sqm of floorspace if supply allowed them to be retained (WISN 2025, para 6.25).

4.4 This is a clear record of demand that exists but cannot currently be expressed because suitable premises are unavailable, the definition of suppressed demand.

4.5 Iceni were further bullish on the demand for industrial space in their work on the Hinchingbrooke Logistics Park, stating that: *"There are number of instances were growing tech and manufacturing businesses have moved out of Cambridge to take advantage of cheaper and more suitable premises in Huntingdonshire in St Ives and Huntingdon."*[27]

4.6 It is concluded that the summary of engagement published in the WISN is more bullish on the need for space than is reported in the Topic Paper.

4.7 As 18 months have passed since the publication of WISN, and the mid-tech sector has shown clear positive market signals since then, further engagement with the industry is recommended to reaffirm the evidence on demand for mid-tech space.

[26] Retrieved from: https://cmrsurgical.com/. Accessed September 2026

[27] Iceni, 2024. Hinchingbrooke Logistics Park – Huntingdonshire Employment Land Needs Assessment. Final Report

5. The locational and strategic case for CSPN has strengthened

5.1 The locational case for CSPN is strong because mid-tech activity is not footloose industrial development. It sits between research and commercial production. Businesses often need to move rapidly from scientific discovery and product design to prototyping, testing, small-scale manufacturing, assembly, storage and distribution. Those activities may fall within overlapping planning use classes, but they depend on a distinct combination of premises, skills, specialist suppliers, research links and transport infrastructure.

5.2 For these businesses, proximity matters. The Council's Growth Sectors Study identifies proximity to research institutions, similar firms, public transport, amenities, scale-up space, the Strategic Road Network and supply chains as important locational factors for science and technology businesses. It finds that collaboration, clustering and critical mass enable growth through interaction, shared research, skills and knowledge. It also distinguishes between the Greater Cambridge cluster at a strategic level and the benefits of co-located facilities, shared meeting space and amenities at the site level.[28]

5.3 This is particularly relevant to mid-tech occupiers. A business developing a medical device, robotics platform, semiconductor component, battery technology or other advanced product may need regular interaction between its research, engineering and production teams. Locating those functions in separate places creates friction: time is lost moving people, prototypes, samples and equipment between sites; collaboration becomes less immediate; and a growing company may need to move away from the research base that supported its early development.

5.4 Co-location can also reduce operating costs and environmental impacts. The Council's evidence shows that clustering can give smaller businesses access to shared resources, including laboratories and support services, thereby reducing costs and supporting growth. A larger, integrated employment location can also provide shared meeting space, training, amenities, mobility services and servicing infrastructure, rather than requiring each occupier to provide these facilities separately.[29]

5.5 There is a further transport benefit. Where research, engineering, production and supporting services are located in close proximity, some journeys between sites can be avoided or shortened. The Council's proposed employment policy recognises that integrating facilities within employment areas can reduce the need for off-site travel during the working day, help manage peak-time congestion and improve air quality.[30]

5.6 CSPN is particularly well suited to this model. The site sits in close proximity to Cambridge Science Park, one of Greater Cambridge's principal science and technology clusters. The Council's Growth Sectors Study records that Cambridge Science Park accommodates a mix of science and technology businesses, including start-up provision, and benefits from proximity to the A14, Cambridge North station, the Guided Busway and cycle connections. It also records that businesses at the Park have relocated elsewhere in

[28] Iceni, 2024. Greater Cambridge Growth Sectors Study: Life Science and ICT Locational, Land and Accommodation Needs. Paras 5.15 to 5.17. Available at: consultations.greatercambridgeplanning.org

[29] Iceni, 2024. Greater Cambridge Growth Sectors Study: Life Science and ICT Locational, Land and Accommodation Needs. Paras 0.15, 5.17 and 5.35. Available at: consultations.greatercambridgeplanning.org

[30] Greater Cambridge, 2026. Proposed Submission Greater Cambridge Local Plan, Policy J/EP: Supporting a range of facilities in employment parks. Available at: consultations.greatercambridgeplanning.org

Greater Cambridge where they required a mix of office, R&D, production and storage space for expansion.[31] Iceni presented this argument in their work on Hitchingbrooke Logistics Park:[32]

- *"Greater Cambridge hosts a number of renowned centres of learning and as a national focus for life sciences and ICT activity, with a wide number of science parks on the city fringe and south of the city. Greater Cambridge however has very limited industrial and industrial engineering tech park provision."*
- *"Comparing Cambridgeshire to the Oxfordshire context, the wider Oxford hinterland has taken advantage of the science and technology offer compared to Cambridgeshire. Many districts including Cherwell and the Vale of White Horse have seen tech related investment and a proliferation of science and engineering centres and sectors that have spun out of the city – whereas Cambridge has retained a purer life science / tech focus."*
- *"The life sciences hub in Greater Cambridge creates manufacturing opportunities. Whilst the Astra Zeneca R&D centre is in Cambridge, Macclesfield hosts the UK manufacturing operations and is the second largest manufacturing site in the AstraZeneca global network. Such opportunities are therefore currently lost to the East of England but could be captured should suitable premises be provided."*

5.7 CSPN would directly address this gap in the existing cluster. It would provide the industrial and mid-tech accommodation that research-led firms may require as they move beyond laboratory or office-based activity, while allowing them to remain connected to the talent, networks, amenities, customers, investors and specialist services concentrated at Cambridge Science Park and across North East Cambridge.

5.8 The case has strengthened materially since the preparation of WISN 2025. In May 2026, Cambridge Science Park submitted a masterplan for planning consent which seeks to increase its built floorspace from around 2.8 million sqft to around 8 million sqft. The masterplan remains subject to the planning process. Nevertheless, its submission is clear evidence of a substantial long-term commitment to intensifying Cambridge Science Park as a major research and innovation location.[33]

5.9 The proposed expansion of Cambridge Science Park reinforces the need for CSPN. A larger research and innovation campus will increase the importance of ensuring that firms can remain within the north Cambridge cluster as they grow and require more varied accommodation. Without adjacent mid-tech capacity, there is a risk that businesses undertaking product development, prototyping and production will continue to move elsewhere when they outgrow conventional office or laboratory premises. The economic benefits of research activity would then be less likely to translate into local manufacturing, skilled technical employment and supply-chain expenditure.

5.10 This is consistent with the Council's wider policy direction. The Proposed Submission Local Plan seeks to support a flourishing and mixed economy while maintaining Greater Cambridge's global reputation for education, research and innovation. It states that employment centres must provide more than employment buildings: they should include supporting facilities, green spaces and services that enable people and businesses to thrive, realise the benefits of collaboration and support sustainable and inclusive growth.[34]

5.11 It is also consistent with the Council's evidence on the characteristics of successful science and technology locations. The Growth Sectors Study concludes that Greater Cambridge should prioritise place-based business destinations which provide modern workspace, form part of a larger cluster or community, enable knowledge exchange, offer amenities and are well served by public transport and the road network. It

[31] Iceni, 2024. Greater Cambridge Growth Sectors Study: Life Science and ICT Locational, Land and Accommodation Needs. Paras 3.26 to 3.30. Available at: consultations.greatercambridgeplanning.org

[32] Iceni, 2024. Hinchingbrooke Logistics Park – Huntingdonshire Employment Land Needs Assessment. Final Report

[33] Retrieved from: cambridgesciencepark.co.uk. Accessed September 2026

[34] Retrieved from: https://consultations.greatercambridgeplanning.org/. Accessed September 2026

specifically identifies the need for Cambridge Science Park to continue evolving through accommodation across a range of scales, enhanced connectivity and improved amenity.[35]

5.12 CSPN provides the opportunity to apply these principles in a coherent way. It would combine:

- Direct adjacency to Cambridge Science Park and its established research, business and innovation ecosystem;
- Space suited to the transition from R&D into prototyping, testing, production, storage and distribution;
- Access to Cambridge's skilled labour market, Cambridge North station, the Guided Busway and the Strategic Road Network;
- The potential for shared facilities, services, skills provision and supply-chain relationships across the wider cluster;
- A substantial Country Park and associated green infrastructure, alongside an educational hub linked to Cambridge Regional College; and
- Sufficient scale, around 120,000 sqm of industrial and mid-tech floorspace, to provide a genuine growth pathway rather than a small and fragmented addition to supply.

5.13 The environmental and landscape effects of development north of the A14 require careful assessment and should be given proper weight. The Council identifies potential Green Belt and landscape harm in this location. However, that harm must be considered alongside the strategic benefits of locating mid-tech development where it can support an established and expanding research cluster, reduce the need for dispersed development, support sustainable travel, and retain more of the value created by Cambridge-based research within Greater Cambridge.

[35] Iceni, 2024. Greater Cambridge Growth Sectors Study: Life Science and ICT Locational, Land and Accommodation Needs. Paras 9.2 to 9.3. Available at: consultations.greatercambridgeplanning.org

6. Deliverability risk

Potential supply of space

6.1 The 2025 WISN identifies 34,652 sqm of potential supply in Use Class E(g)(iii).[36] This should not, however, be treated as a secure mid-tech supply figure. E(g)(iii) is a flexible use class and does not guarantee that floorspace will be occupied by mid-tech businesses.

6.2 WISN itself identifies further uncertainty. It notes that around 15,000 sqm of the E(g)(iii) floorspace counted towards the supply balance, outside Bourn and Cambridge Research Park, is *"uncertain in terms of mid-tech suitability"*.[37] The headline figure of 34,652 sqm therefore overstates the amount of space that can confidently be expected to meet mid-tech need.

6.3 The Council concludes at paragraph 2.36 of the Topic Paper that Iceni's research does not identify sufficient need for the scale of development proposed at Cambridge Science Park North (CSPN), because *"other more appropriate sites"* can meet the identified need. The sites relied upon are Cambridge Research Park, Bourn, Sawston and Eddington.

6.4 The potential contribution from these locations is unclear in several cases:[38]

- **Cambridge Research Park**: this includes provision for 5,270 sqm of B2 floorspace and 11,220 sqm of E(g)(iii) floorspace. It is not clear what proportion, if any, would be suitable for mid-tech uses.
- **Bourn**: this includes 5,019 sqm of E(g)(iii) floorspace and 5,018 sqm of B8 floorspace. The evidence does not identify how much of this would be mid-tech space.
- **Sawston**: this is identified as capable of providing 1,962 sqm of E(g)(iii) floorspace and 1,380 sqm of B8 floorspace, alongside a loss of 2,823 sqm of B2 floorspace. Again, the evidence does not identify a defined mid-tech component.
- **Eddington**: this is described as capable of providing up to 40,000 sqm for university-related mid-tech and commercial research uses, within Use Classes E(g) and sui generis.[39]

6.5 Eddington is materially different from the other locations. Its potential mid-tech contribution is described as up to 40,000 sqm, but this figure is not derived from or tested in the evidence reviewed. Instead, it identifies Bourn, Sawston and Cambridge Research Park as the available supply. It then recommends identifying *"an additional edge of centre location"* beyond these sites.[40]

6.6 Even if the potential capacity at these sites were assumed to come forward, it would fall materially short of the requirement identified through Volterra's suppressed demand analysis – providing less than 70,000 sqm. The likelihood of this all happening is further uncertain, particularly with Eddington, as the 40,000 sqm of space can also come forward for other commercial uses. Volterra's suppressed demand analysis identifies demand for between 122,000 sqm and 135,000 sqm of light industrial floorspace alone (forming part of the total 420,000 to 525,000 sqm of need identified after factoring in suppressed demand).

6.7 There is also a separate question of delivery. The existence of an allocation, permission or flexible-use capacity does not mean that suitable mid-tech floorspace will be delivered within the relevant period. This is

[36] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs

[37] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Table 7.5 - footnote

[38] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Table 7.4

[39] Retrieved from: https://consultations.greatercambridgeplanning.org/. Accessed September 2026

[40] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Paragraph 7.22

particularly important where the Council relies on flexible E(g) permissions, outline consents and sites whose delivery is uncertain.

6.8 The Council's own Topic Paper acknowledges uncertainty regarding delivery at North East Cambridge (NEC). In considering the South Trumpington site, paragraph 2.11 states that sites in the emerging plan will meet identified needs, including CB1, NEC and Cambridge East, *"notwithstanding the uncertainty regarding its delivery"*. This is an express acknowledgment that a location relied upon to meet need may not come forward as expected.

6.9 This matters because the Council relies heavily on NEC and the wider north and north-west Cambridge growth area in its response to employment need, including through the asserted mid-tech role of Eddington. Where NEC-related capacity and Eddington's mid-tech contribution are uncertain, they cannot be treated as secure substitutes for a committed proposal at CSPN.

6.10 The Annual Monitoring Report provides further evidence that permitted industrial floorspace does not necessarily translate into completed development. As at March 2024, the Council recorded 114,276 sqm of light industrial or industrial floorspace with planning permission. Of this, only 2,979 sqm, around 3%, was under construction.[41]

6.11 The 2024-25 Annual Monitoring Report reinforces this concern:[42]

- In Cambridge, B1c, B2 and B8 uses each recorded a net loss of floorspace during 2024-25 (Table 35).
- In South Cambridgeshire, B1c floorspace increased by 1,667 sqm and B8 floorspace increased by 6,775 sqm, but B2 floorspace fell by 234 sqm (Table 36).
- In Cambridge, no B1c, B2 or B8 floorspace was under construction. There was also a net loss of 405 sqm of B8 floorspace (Table 47a).
- In South Cambridgeshire, 3,041 sqm of B1c floorspace and 1,729 sqm of B8 floorspace were under construction. However, B2 floorspace recorded a substantially larger loss of 15,439 sqm (Table 47b).

6.12 This evidence demonstrates the distinction between consented capacity and delivered supply. It also reflects the Council's own evidence base, which recognises that *"proposals can change, particularly where applications are outline or for E(g) or B1 mixed components"*.[43]

6.13 The available evidence therefore does not support treating the WISN supply figure as a secure and deliverable mid-tech pipeline. Part of the identified E(g)(iii) supply is expressly uncertain in terms of its suitability for mid-tech use. The contribution from Eddington is unquantified. More generally, the Annual Monitoring Report shows limited delivery of industrial space, including very limited construction activity against the stock of permitted floorspace.

6.14 Against this context, CSPN responds directly to the gap identified in the Council's own evidence. WISN concludes that, after considering existing and committed supply at Bourn, Sawston and Cambridge Research Park, *"an additional edge of centre location with closer city proximity and links would be preferable"*.[44]

6.15 CSPN matches this description. It is immediately adjacent to Cambridge Science Park, connected to the consented Waterbeach to Cambridge busway and Cambridge North station, and would deliver around 120,000 sqm of industrial and mid-tech floorspace. The proposal also includes an 80-hectare Country Park,

[41] Volterra Technical Note, January 2026, paragraph 4.12

[42] Greater Cambridge, 2026. Annual Monitoring Report 2024-25 – Appendix 2: Tables and Charts

[43] Iceni Projects, 2024, Greater Cambridge Growth Sectors Study, cited in Volterra Technical Note, January 2026, paragraph 4.12

[44] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Paragraph 7.22

an educational hub linked to Cambridge Regional College, around 3,500 mid-tech jobs, and at least 460 training and apprenticeship places over ten years. (Volterra Technical Note, January 2026, paragraphs 1.25 and 7.9).

6.16 The Council's June 2026 Review reaches a consistent conclusion. It confirms that WISN's recommendation for *"a new mixed industrial / tech park on the SRN, preferably but not critically located on the Cambridge fringe"* remains appropriate.[45] CSPN is capable of meeting that identified requirement.

10% indicative allocation

6.17 The Council's identified supply is not sufficient even to provide a secure response to its own indicative 10% allocation for mid-tech space. Applied to the Plan's overall allocation of 317,000 sqm, this equates to around 31,700 sqm. WISN identifies 34,652 sqm of potential E(g)(iii) supply. However, it expressly identifies around 15,000 sqm of this as uncertain in terms of mid-tech suitability. On this basis, only around 19,650 sqm can reasonably be treated as potentially suitable, which is around 12,000 sqm below the Council's own starting assumption.[46]

6.18 The critical issue is therefore the 10% assumption itself. WISN 2025 records that mid-tech and advanced manufacturing tenants occupy 10.1% of existing floorspace.[47] This historic share has been used as the basis for the indicative allocation. However, the underlying employment evidence suggests that this may materially understate the scale of activity that should be considered mid-tech.

6.19 In particular, WISN's BRES-based measure identifies 3,145 jobs in mid-tech activities. Cambridge Ahead identifies 11,789 jobs in related activities, nearly four times as many.[48] WISN attributes this difference to definitional choices. That is an important qualification. It means that the 10% allocation is not a settled measure of the sector's requirement. It is one interpretation of an uncertain and potentially narrow evidence base.

6.20 A need for space share derived from historic occupation patterns may be inadequate if mid-tech activity grows faster than other industrial sectors, or if logistics takes a greater share of the overall industrial allocation than assumed. WISN itself identifies mid-tech as an emerging sector and recognises that its requirements can overlap with, and compete for, the same B2, B8 and E(g)(iii) space as manufacturing, distribution and general industrial users.[49]

6.21 The Council's June 2026 Review of Economic Data, Context and Representations does not resolve this issue. It recognises *"mixed views on future demand"* and describes mid-tech space *as "broadly interchangeable with other high quality B2/B8 space"*.[50] That flexibility has practical limits. Space capable of accommodating a mid-tech occupier may instead be taken up by logistics or other industrial uses. Once this occurs, the theoretical availability of flexible industrial floorspace does not provide capacity for mid-tech businesses in practice.

6.22 The Review nevertheless maintains WISN's recommendation for *"a new mixed industrial / tech park on the SRN, preferably but not critically located on the Cambridge fringe",* which it considers to *"remain a suitable recommendation"*.[51] This acknowledges the need for capacity that can accommodate industrial and

[45] Iceni, 2026. Review of Economic Data, Context and Representations. Paragraph 5.5

[46] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs.

[47] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Table 3.5

[48] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Paragraphs 3.46 to 3.48

[49] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs

[50] Iceni, 2026. Review of Economic Data, Context and Representations. Paragraph 5.5

[51] Iceni, 2025. Greater Cambridge Warehouse and Industrial Space Needs. Page 11

technology-related activity together, rather than relying solely on an undifferentiated pool of B2, B8 and E(g) floorspace.

6.23 CSPN provides the locational model identified in that recommendation. It is immediately north of the A14 and adjacent to Cambridge Science Park. It can combine Strategic Road Network access with proximity to Cambridge's science and technology cluster, labour market and supporting amenities.

6.24 The case for allocating CSPN is not that mid-tech should be treated as wholly separate from industrial, logistics or R&D activity. Nor is it that every square metre should be reserved for a particular occupier type. The point is more fundamental: the Council's identified supply is sufficient only against an indicative 10% mid-tech assumption that is likely to be a substantial underestimate of the sector's potential requirement.

6.25 The Plan should therefore provide sufficient capacity, in suitable and deliverable locations, to accommodate mid-tech growth alongside logistics and other space-intensive industrial demand. Otherwise, logistics and conventional industrial uses may absorb the flexible supply on which the Council relies, leaving insufficient space for mid-tech occupiers. The apparent flexibility of the 317,000 sqm allocation would then become inflexibility in practice.

6.26 CSPN can support this requirement by:

- Providing around 120,000 sqm of industrial and mid-tech floorspace at a location suited to both technology-related production and other industrial activity;
- Offering a large, coherent site where uses can be brought forward in response to demand, rather than being constrained by a fixed and potentially understated 10% allowance;
- Separating the question of whether space is physically capable of accommodating mid-tech use from the question of whether it remains available after competing industrial and logistics demand has been met; and
- Delivering the edge-of-centre, Strategic Road Network-connected mixed industrial and technology location recommended in WISN and retained in the Council's June 2026 Review.



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