

Land at South Trumpington

Employment and housing needs case

March 2025

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1. Executive summary

1.1 This Employment and Housing Needs Case has been prepared on behalf of British Land in support of the Greater Cambridge Local Plan 'Sites Submission Consultation' exercise. The promoter, British Land, owns the Site at South Trumpington, Cambridge and are committed to promoting the Site through the emerging Greater Cambridge Local Plan.

1.2 Greater Cambridge is one of the UK's most vital economic assets, home to the largest life sciences cluster in Europe, world-class research institutions, and emerging sectors like AI, Genomics, and Semiconductor Design. With an economy generating £51bn annually, it stands as Europe's fastest growing technology sector, supported by key manufacturing, data storage, and logistics industries that ensure day-to-day operations, and contributes £1bn to the Treasury, making it a global hub of innovation and a cornerstone of the UK's growth strategy.

£51bn

In **annual turnover** generated by the Cambridge City region.

308

Greater Cambridge generates **308 patents** per 1,000 residents, **twice the national average**.

£1bn

Cambridge contributes at least **£1bn annually to the exchequer**.

£30bn

The University of Cambridge's **total net UK economic impact in 2021/22**.

1st

Highest ranked city in the world for innovation per capita.

5,000

Greater Cambridge is Europe's largest technology cluster, home to over **5,000 knowledge intensive firms**.

1.3 The Government stated on 28 August 2024 that Greater Cambridge has a vital role to play in this Government's mission to kickstart economic growth. The Cambridge Growth Company has been tasked with identifying the growth capacity of the city region.¹ In addition to the Local Plan preparation, the Cambridge Growth Company is currently developing the evidence but we understand that a core tenant is for "one or more contiguous urban extensions of the city" as a core component of the vision for the growth of Cambridge and the plans are to go further than the local plans, in terms of scale, ambition and timescale.²

1.4 The latest evidence on need in Greater Cambridge undertaken by Iceni in January 2023 identified an objectively assessed need for 66,600 jobs and an associated requirement for 51,723 homes (an annual need of 2,463).³ While the area's stated intention is to meet this need within the plan period,⁴ this 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.

1.5 In light of that broader growth agenda, while the Iceni analysis provides a useful foundation for understanding employment and housing need in Greater Cambridge, it predates the Government's recent

¹ Appointment of Cambridge Growth Company Chair: Letter from Matthew Pennycook MP. Published 31 October 2024.

² Appointment of Cambridge Growth Company Chair: Letter from Matthew Pennycook MP. Published 31 October 2024.

³ Iceni Projects Limited on behalf of Greater Cambridge Shared Planning (January 2023), Greater Cambridge Employment and Housing Evidence Update Employment Land, Economic Development and Relationship with Housing

⁴ Greater Cambridge Shared Planning (January 2023), Greater Cambridge Local Plan Strategy topic paper Development Strategy Update (Regulation 18 Preferred Options)

emphasis on unlocking far more ambitious growth in the area. Given Cambridge's role at the forefront of the UK's innovation economy, future evidence will need to test whether the scale of need identified by IcenI sufficiently aligns with that ambition. This next stage of plan-making will be critical in examining whether the area's planning and land allocations can genuinely fulfil the Government's objectives, ensuring that Greater Cambridge remains globally competitive and fully capitalises on emerging opportunities in life sciences, AI, and other innovation sectors.

Need for employment space

- 1.6 Demand for commercial space in Greater Cambridge has been driven by the commercialisation of research at the University of Cambridge, strong global investment in high growth companies, and a thriving start-up and scale-up ecosystem. The area's world-leading innovation and high venture capital inflows has created strong continuous demand for modern, high quality commercial space.
- 1.7 These trends have led to an imbalance between supply and demand for office and lab space. While lab stock has grown by 232% since 2002, and office space by 59%, availability remains critically low. In 2021, lab vacancy rates were at an unprecedented 0.5%, and in mid-2024 office availability stood at 10%. Demand for floorspace far outstrips supply, with average annual take-up meeting only 29% of R&D requirements and 64% of office needs.
- 1.8 Adding to these pressures is the outdated nature of much of Cambridge's commercial stock. Around 71% of the total stock was built before 2000 and fails to meet the needs of modern occupiers. Premium-grade facilities, which is what is required for Cambridge to compete in attracting companies on a global scale, are particularly scarce, with 1.5% availability for top-tier properties.

Why here?

- 1.9 Retaining and attracting major research/R&D facilities and employers, such as AstraZeneca, is key to the success of the Cambridge region and the UK plc. The top end space has to be in the right location in order for Cambridge and the UK to fully realise its potential in this sector given the competition globally. The site offers the opportunity to do just that.
- 1.10 In September 2024, Greater Cambridge published evidence on the locational and accommodation needs of key sectors of life science and ICT.⁵ The site performs well on many of the key criteria identified in that report, including:
- **Accessibility and location** – Getting staff to their place of work is critical. In that context, South Trumpington is a prime location for sustainable development, supported by existing and emerging transport infrastructure, including the Trumpington Park and Ride, Cambridge South Railway Station, the South West Travel Hub, the Melbourn Greenway, and East-West Rail. These strong transport links, combined with its proximity to the CBC and a well-integrated network of active travel routes, will enhance connectivity, reduce car dependency, and create a vibrant, community-oriented environment.
 - **Proximity to clusters and growth areas** – the IcenI report, which assesses the employment and housing need within Greater Cambridge, notes that proximity to research centres such as CBC is a key locational priority for some businesses. The site is located near CBC and well located to maximise the benefits of agglomeration,⁶ a key focus of the government.

⁵ IcenI Projects Limited on behalf of Greater Cambridge Shared Planning (September 2024), Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs

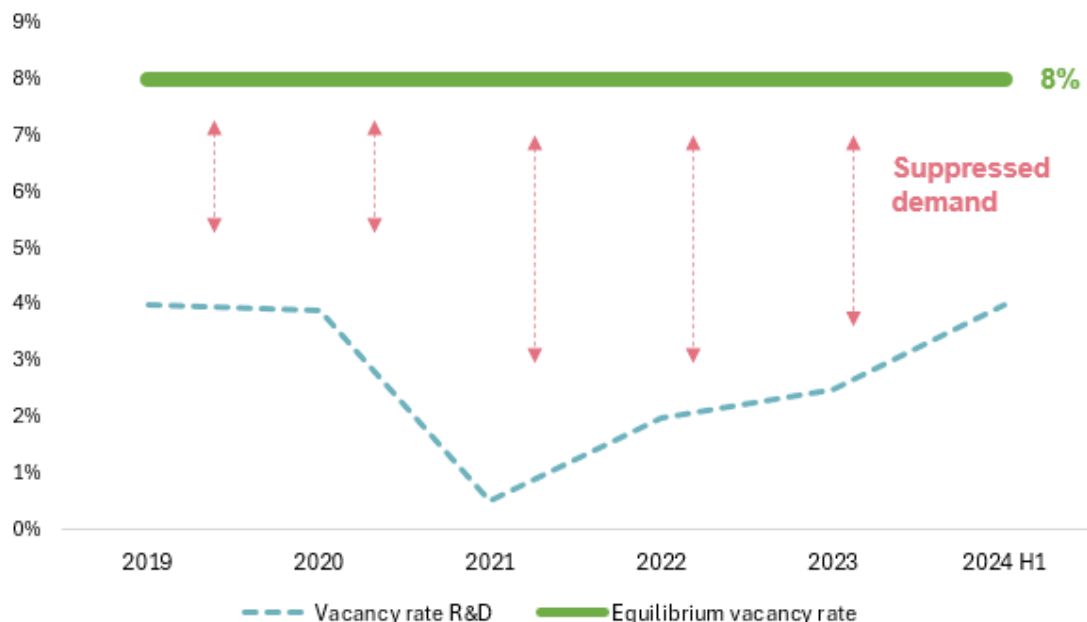
⁶ The Site is located to the southwest of Cambridge City Centre. Land to the west of the Site forms Trumpington Meadows Country Park. To the south is the M11, beyond which is currently agricultural but is the site of the South West Travel Hub (SWTH) facility. To the east is the A1309 Hauxton Road, and land further east is also in agricultural use. To

- **Importance of place-based business destinations** – South Trumpington will be a vibrant, high-quality development, offering a rich mix of cafes, restaurants, leisure facilities, and expansive public open spaces. This amenity-driven environment will create a dynamic and attractive destination for residents, businesses and employees.
- **Space for start-ups and scale-ups** – South Trumpington has potential to include areas for these emerging businesses, enabling them to grow within the Cambridge ecosystem. British Land's Innovation Advisory Council, led by senior academics and industry experts, further ensures that the commercial could be successful if tailored to life sciences and innovation-focused occupiers.

Underestimating future demand and delivery challenges

1.11

The Icení 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 1.09 million square metres of commercial floorspace between 2020 and 2041, with R&D space accounting for over half of this need.⁷ However, these estimates do not fully account for suppressed demand, where a persistent lack of available supply has constrained potential growth over the past decade.⁸ The following chart illustrates that R&D vacancy rates have consistently remained below the equilibrium or frictional vacancy level necessary for a healthy market, highlighting this unmet demand.



Source: Bidwells, 2024. Arc Market Databook July 2024

the north is the development of Trumpington Meadows, which continues to be developed. Part of the Site is currently used as construction welfare/ logistics associated with Trumpington Meadows.

⁷ Icení, 2023. Greater Cambridge Employment and Housing Evidence Update

⁸ The report's definition of 'R&D' encompasses a wide spectrum of high-tech and innovation-focused activities, including (but not limited to) biotechnology, MedTech, AI, software development, gaming, and advanced manufacturing. This ensures that the commercial space requirements reflect the diverse needs of Greater Cambridge's thriving technology and life sciences ecosystem.

1.12 Additionally, the estimates focus on net additional floorspace but overlook the need for gross completions to replace ageing or converted stock. Between 2011 and 2021, data from the Iceni 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.

1.13 While the Iceni reports 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 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.

Need for mid-tech and logistics

1.14 A wide number of sectors support the function of the Cambridge economic eco-system. On 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. While we understand Iceni is currently reviewing warehouse and industrial location requirements in Greater Cambridge, their latest work has identified a significant shortfall in such space⁹ which falls within a range of uses classes between large scale storage and distribution and offices. 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.

1.15 Given its location, and accessibility, future development at South Trumpington also has the potential to provide facilities which directly support the operations of strategic organisations in the City such as CBC or CUH.

Housing need

Local challenges

1.16 Housing affordability is a significant challenge for many in Greater Cambridge, with median house prices in Cambridge reaching £493,000 and house price-to-earnings ratios at 12 – rising to 14.8 times earnings for those on lower incomes in the health sector. A key challenge for employers is accessing a talent pool/employee base. A critical intervention is required to fulfil existing and future roles in this sector. Despite a 17% increase in housing stock between 2010 and 2022, this growth has lagged behind a 23% rise in employment, intensifying affordability pressures.

1.17 Cambridge's average rent of £1,700 per month further demonstrates the issue, making it the most expensive non-commuter town in the East of England. These challenges highlight the urgent need for housing solutions tailored to the needs of existing and future working residents to sustain economic growth and support critical sectors like healthcare.

⁹ Iceni (2023) highlights a critical shortfall of 149,164 sqm in industrial and warehouse space in Greater Cambridge. Despite a need for 200,000 sqm by 2041, supply as of December 2022 is just 56,935 sqm, reflecting suppressed delivery and unmet demand that risks constraining economic growth and key sector support.

Meeting housing needs through strategic development

- 1.18 The standard method for Greater Cambridge increased from 1,726 to 2,309 homes per year with the results of the new standard method in December 2024. The new figure is more in line with Greater Cambridge's assessed need of 2,463. GCSPS reported that the increase in the standard method means they cannot currently demonstrate a five year housing land supply but they are reviewing this and expect to identify more sites.
- 1.19 British Land is engaging with important local employers including Cambridge Biomedical Campus and Cambridge University Hospital to discuss their housing need. The CBC Housing Study is clear that many of the 22,000 employees struggle to find housing and the limited affordable housing options affects the ability of CBC employers to recruit and retain staff. British Land will continue to work with CBC and CUH to understand housing need of current and future workers at this strategically important site – with the potential to provide affordable and/or key worker housing.

Summary

- 1.20 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 space 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. This site can deliver that.
- 1.21 This strategically accessible site, with no barriers to delivery, 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.

2. Introduction

- 2.1 This Employment and Housing Needs Case has been prepared on behalf of British Land in support of the Greater Cambridge Local Plan 'Sites Submission Consultation' exercise.
- 2.2 The promoter, British Land, owns the Site at South Trumpington, Cambridge and are committed to promoting the Site through the emerging Greater Cambridge Local Plan.
- 2.3 British Land have a strong reputation of delivering state-of-the-art developments, in the best strategic locations, built and managed to British Land's industry-leading standards. They do this by bringing together their unique expertise in the delivery of complex developments, as well as their award-winning sustainability practices.
- 2.4 The submission, which this document forms part of, demonstrates that the Site is suitable, achievable, and deliverable for allocation and, ultimately, development, subject to future planning permission(s).
- 2.5 This submission replaces all technical information provided to Greater Cambridge by the previous landowner (Grosvenor).

Purpose of the report

- 2.6 The purpose of this report is to support British Land's Sites Submission Consultation submission as part of the emerging Local Plan process. The report:
- Examines existing baseline conditions in relation to employment and housing;
 - Explores the need for commercial and housing development in Greater Cambridge; and
 - Sets out the opportunity of the South Trumpington development to meet identified commercial and housing needs in Greater Cambridge.
- 2.7 This report concludes that there is significant need for both commercial and housing development. A key strength of future development at South Trumpington is that it does not only contribute to the overall need for commercial and housing development, but that it can provide something that others can't – a state-of-the-art development in a truly accessible location, where resident and employees amenities are on hand and active travel or public transport is the obvious choice. Further, as appropriate, this development could be tailored to existing businesses looking to expand, or external global occupiers that specifically chooses to locate in Cambridge, close to established sectors such as those at CBC. It can operate also operate as its own cluster of knowledge and creativity with the potential to also become a place-based business destination, with space for start-ups, scale-ups, and housing.

The vision for South Trumpington

- 2.8 The Vision is to provide an exemplar and deliverable growth proposition for Cambridge, offering a rich mix of uses to potentially include, floorspace for a wide range of jobs (offices, science and technology, R&D, mid-tech), a range of housing types including affordable and/or essential worker housing, community facilities, mobility hubs and complementary retail and workspace. There is an opportunity to extend the Country Park and provide routes through, connecting into the neighbouring Trumpington Meadows local centre.

The opportunity

- 2.9 The Opportunity is to provide a deliverable growth proposition for Cambridge: a mixed-use urban extension comprising a range between 400-1,000 homes and up to 260,000 sq. m (GEA) of other floorspace including flexible employment uses and supporting infrastructure. The range of floorspace and land use is necessary for flexibility at this early stage of the planning process as explained more fully in the supporting 'Vision Document' (AAM) and will be explored further through design evolution and pre-application discussions with Greater Cambridge Shared Planning Service (GCSPS).
- 2.10 To inform the submission, an Illustrative Development Option has been prepared. The Illustrative Development Option as shown in the Vision Document represents a commercially led, mixed-use proposal for the Site (approximately 225,000sq.m GEA and approximately 400 homes). The proposals have the scope to change throughout the process up to the maximum range (of above), subject to design evolution, viability and/or securing additional grant funding. The Opportunity seeks to promote the Site for Use Classes B, E, F, C1, C3 and Sui Generis.

Report structure

- 2.11 The remainder of this report is structured as follows:
- **The Greater Cambridge context:** This section covers what makes Greater Cambridge a unique growth hotspot;
 - **Why now?** This section explains why timely action is needed to meet Greater Cambridge's economic and community needs. It highlights the need for new commercial space in this location to support the region's innovation ecosystem and then reviews the urgent housing need;
 - **Why here?** This sections covers why the South Trumpington site is the perfect location for delivering high quality commercial space and housing in an accessible location near key employment centres;
 - **The opportunity:** An infographic summarising the opportunity; and
 - **Conclusion.**

3. The Greater Cambridge context

Greater Cambridge has experienced remarkable economic success, driven by its world-class research institutions, thriving high-tech and life sciences clusters, and its ability to attract and retain global talent. However, sustaining this success – and unlocking the full potential of the region – requires continued growth. Without it, Cambridge risks losing its competitive edge, limiting its contribution to the UK economy, and stalling progress in critical sectors.

What makes GC unique?



Source: Cambridge Ahead, 2024. General Election 2024: The Cambridge Contribution to UK Ambitions Metrics

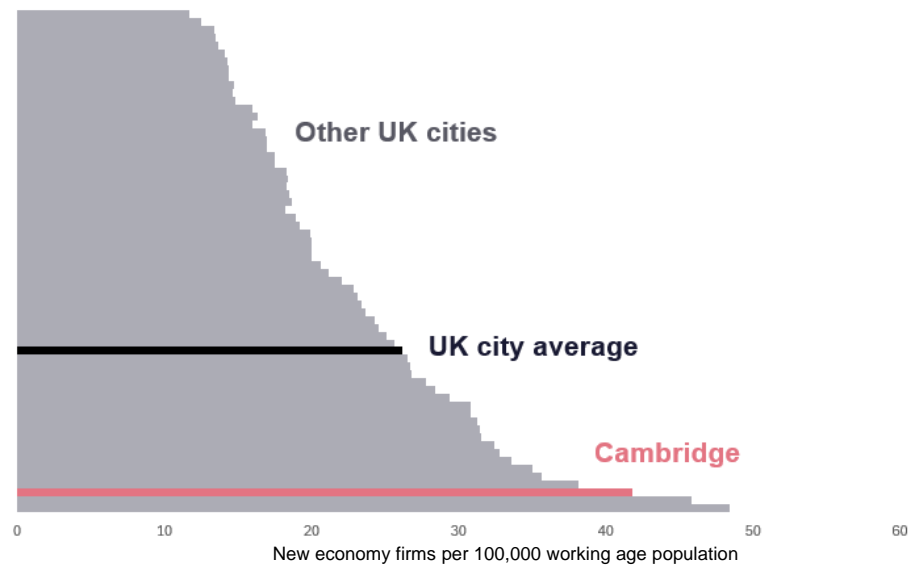
- 3.1 The Greater Cambridge region forms a key part of the evolving UK Industrial Strategy introduced by the new Labour Government.¹⁰ The Industrial Strategy is focused on places making the most of their unique strengths.
- 3.2 The uniqueness of the GC economy is well documented. It has several attributes that enable the clusters to thrive:
- Access to a highly skilled labour pool and source of entrepreneurs related to the universities;
 - Knowledge spillovers and informal learning facilitated by the scale of the sector clustering and interaction between academics, institutions and business; and
 - Depth of the supporting supplier base across the range of professional services such as financial and legal.
- 3.3 Greater Cambridge is one of the UK's most vital economic assets, home to the largest life sciences cluster in Europe, world-class research institutions, and emerging sectors like AI, Genomics, and Semiconductor

¹⁰ Department for Business and Trade, 2024. Invest 2035: the UK's modern industrial strategy

- Design. With an economy generating over £50bn annually and contributing £1bn to the Treasury, it is a global hub of innovation and a cornerstone of the UK's growth strategy.
- 3.4 Greater Cambridge's blend of world-class universities, cutting-edge research institutions, and a thriving technology cluster has laid a strong foundation for sustained economic growth. As a result, Cambridge has become one of the most productive cities in the UK.
- 3.5 The University of Cambridge consistently ranks among the top 10 universities worldwide, excelling in subjects such as materials science, engineering (chemical, mechanical, aeronautical, manufacturing, and electrical), and electronics. This provides a steady pipeline of highly skilled graduates, supporting the local workforce and the region's innovation ecosystem.
- 3.6 Cambridge boasts Europe's largest tech cluster, with over 5,000 knowledge-intensive firms. As of May 2024, 24 businesses born in Cambridge have reached \$1bn 'unicorn' status. Recently, Cambridge earned the title of the 'unicorn capital of Europe', with 47.9 unicorns per million inhabitants, far outpacing Luxembourg (17.4) and Oxford (12.9).
- 3.7 At the forefront of new technologies, Cambridge's knowledge-intensive firms are driving innovation in software, robotics, telecommunications, and gaming. These sectors are pivotal to boosting the UK's productivity and contributing to the national economy. As of 2023, Cambridge ranks as the second highest city in the UK for new economy firms per 10,000 working-age residents, reflecting the calibre of its institutions and talent pipeline.

Figure 1 – Cambridge has the third highest proportion of new economy firms of all cities in the UK

New economy firms per 10,000 working age population (2024)



Source: Centre for Cities, 2025. Cities Outlook 2025

Note: New economy firms are defined as new, high-growth industries that are on the cutting edge of technology and are believed to be the driving force of economic growth and productivity.

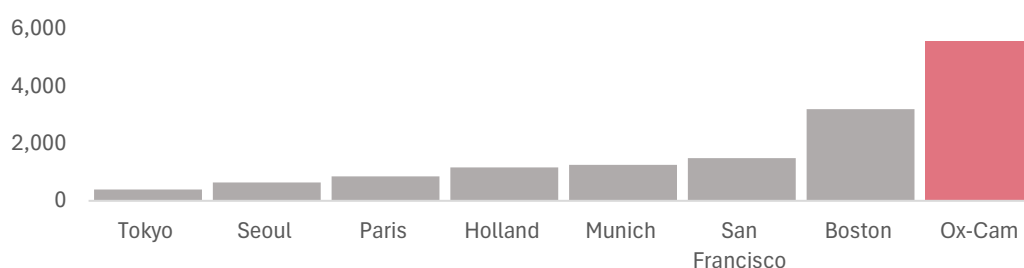
- 3.8 The blend of a high-productivity tech cluster and a globally respected talent pool has significantly increased demand for premium commercial space to support both established firms and emerging market entrants. Cambridge's appeal to knowledge-intensive firms is reinforced by its high-calibre workforce, further driving the demand for commercial space.

The Oxford-Cambridge Supercluster

- 3.9 Cambridge forms a key part of the recently announced Oxford-Cambridge Supercluster.¹¹ This initiative is supported by the Department for Science, Innovation and Technology, major companies like AstraZeneca and Airbus, investors, and top universities. The plan focuses on transforming the region into a global powerhouse for science and technology.
- 3.10 The OxCam region is one of the most innovative regions globally, with a leading amount of scientific publications per capita.

Figure 2 – The Oxford-Cambridge region is one of the most innovative globally

Scientific publications per capita across regions



Source: PublicFirst, 2025. Oxford-Cambridge Supercluster

- 3.11 A recent report for the Oxford-Cambridge Supercluster has identified that if the full growth potential of the Oxford-Cambridge Supercluster is achieved, the region could add an extra £25bn in Gross Value Added compared to today.

Why continued growth in Cambridge is essential

- 3.12 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:** Cambridge's economy contributes over £50bn a year and provides £1bn directly to the Treasury. 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.

¹¹ PublicFirst, 2025. Oxford-Cambridge Supercluster

- **Ensuring a sustainable talent pipeline:** by nurturing a thriving ecosystem, Cambridge can continue to attract and develop a highly skilled workforce drawn from both its universities and global talent pools. As emerging industries demand specialised expertise, enabling growth secures the future of this talent pipeline and, in turn, sustains the region's long-term innovation capacity.
- **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.

3.13

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.

4. Why now?

- 4.1 This section explains why timely action is needed to meet Greater Cambridge's evolving economic and community needs. It first highlights market dynamics and gaps in office and R&D space, demonstrating how constrained supply and rising rents threaten the region's innovation ecosystem. It then examines the important mid-tech and logistics sector, followed by an assessment of employment forecasts, policy context, and the overall shortfall in commercial floorspace. Finally, the section reviews the urgent housing need, particularly around affordability and alignment with Local Plan targets, showing how strategic sites like South Trumpington can address these challenges and sustain Greater Cambridge's future growth.

Commercial need

- 4.2 Cambridge's exceptional growth and global reputation as a hub for innovation have not only driven economic success but also created significant demand for high-quality commercial spaces to support its ecosystem of research institutions, start-ups, and scale-ups.

Market dynamics and gaps in office and R&D space

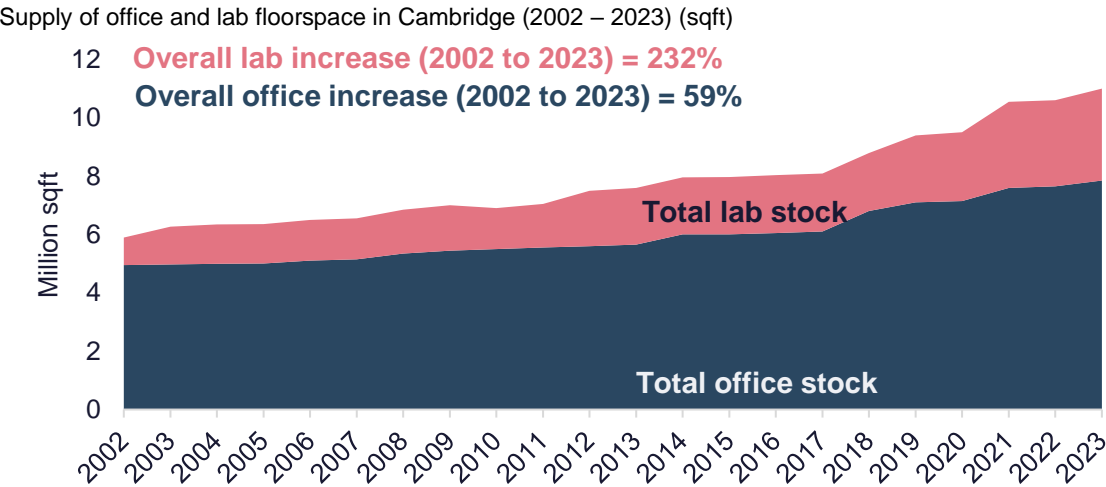
- 4.3 Greater Cambridge's commercial market has seen rapid growth in recent years, driven by its thriving R&D¹² and life sciences sectors, and the development of innovation and technology related to software, robotics and data analytics. Despite this expansion, demand for office, R&D and lab space continues to outpace supply, leading to low availability, rising rents, and growing pressure on the market.

Historic growth in commercial stock

- 4.4 Since 2002, Cambridge has experienced significant growth in its office, R&D and lab stock. Office floorspace has increased by 59%, while lab stock has grown at an even faster rate of 232%, reflecting the surge in demand from life sciences and high-tech firms. Today, the region has approximately 7.9m sqft of office space and 3.2m sqft of lab space.

¹² For the purposes of this report, "R&D" is used broadly to include high-value, innovation-driven activities in life sciences, technology, software, advanced manufacturing, robotics, data analytics, and other related fields. It also acknowledges the essential supporting industries – such as logistics and data infrastructure – that underpin daily operations within these sectors.

Figure 3 – Lab space has seen significant growth across Cambridge

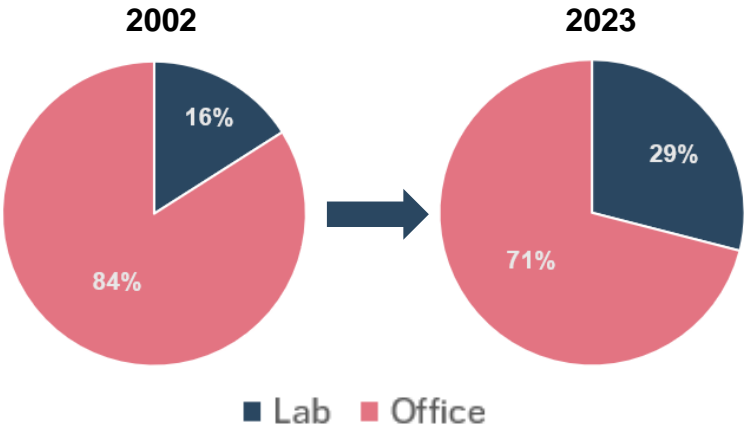


Source: VOA, 2023. Stock of properties including business floorspace

4.5 This expansion has also shifted the balance of Cambridge’s commercial market. Lab space now constitutes 29% of total commercial floorspace, compared to just 16% in 2002, highlighting the growing importance of R&D within the local economy.

Figure 4 – Lab space in Cambridge as a proportion of total office and lab space has increased

Proportion of laboratory and office floorspace in Cambridge (2002, 2023)



Source: VOA, 2023. Stock of properties including business floorspace

Low availability despite expansion

4.6 While the stock has grown, availability remains critically low. In June 2024, Cambridge had:

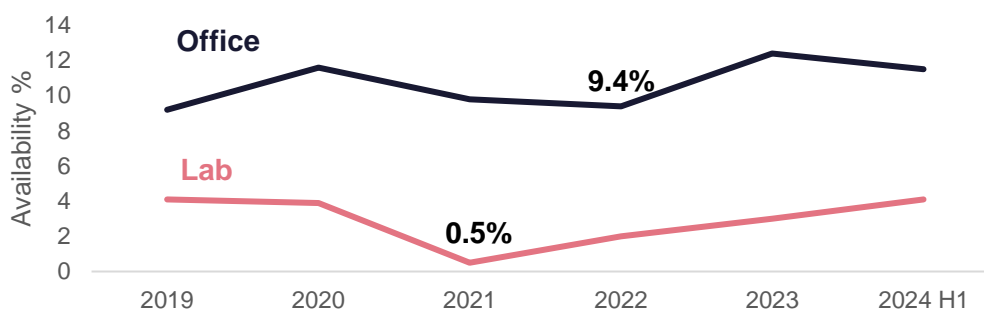
- **128,000 sqft of available lab space**, representing an availability rate of just 4.1%.
- **860,000 sqft of available office space**, with an availability rate of 10%, which is still low by historical standards.

4.7

Lab space availability has been especially constrained, with vacancy rates reaching as low as 0.5% in recent years. Such tight conditions highlight the urgent need for new supply to meet market demands.

Figure 5 – Commercial vacancy rates across Cambridge have been historically low

Vacancy rates for office and laboratory floorspace (2019 – 2024 H1)



Source: Bidwells, 2024. Office and labs: Cambridge Arc Market Databook

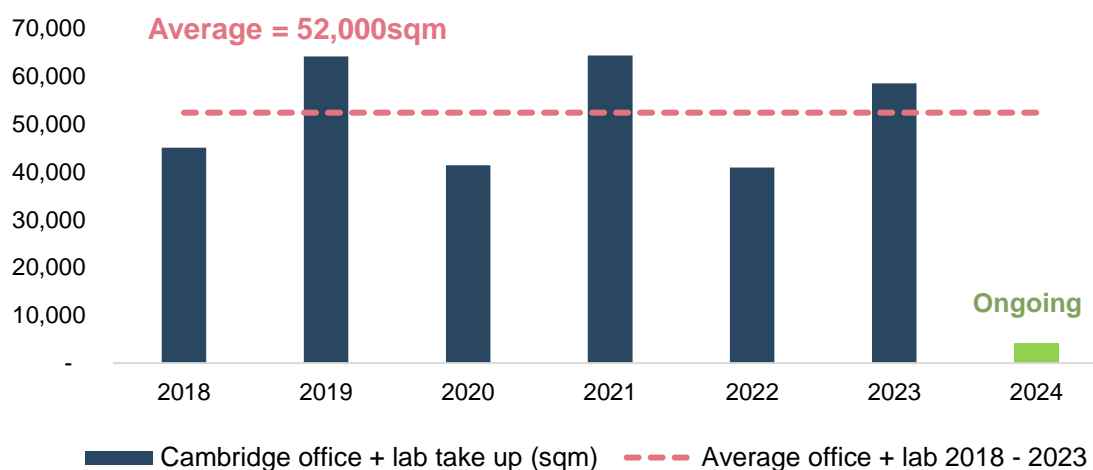
Demand and take up trends

4.8

Demand for commercial floorspace in Cambridge has been persistent, with annual take-up averaging 52,000 sqm since 2018.

Figure 6 – There has been consistently high take-up of office and lab floorspace in Cambridge since 2018

Take up of office and lab floorspace in Cambridge (2018 – 2024) (sqm)

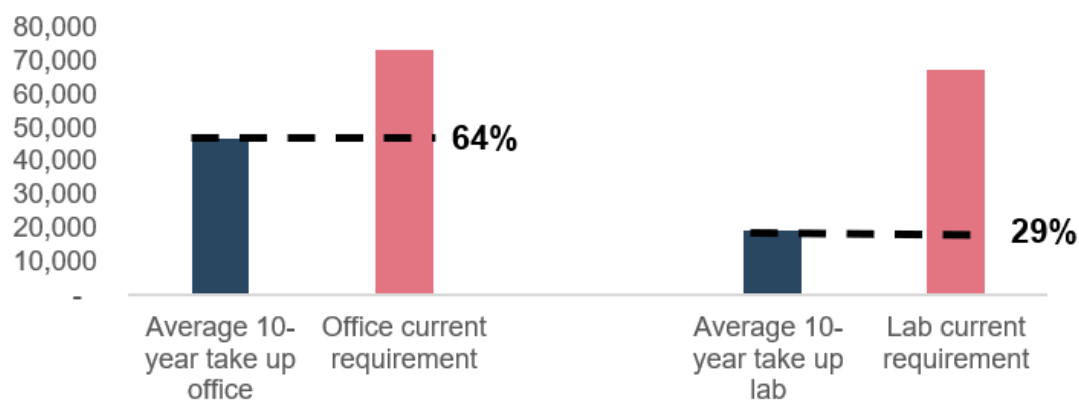


Source: Savills, 2024. Spotlight: Golden Triangle Offices & Laboratories

4.9 A recent Bidwells study indicates a current requirement of approximately 81,000 sqm for office space and 90,000 sqm for lab space in Cambridge. **Figure 7** shows the current annual requirement for both office and lab space has exceeded the average take up of office and lab floorspace across Cambridge over the last 10-years. The average take-up for office space represents 64% of the current office requirement, while R&D take up meets just 29% of demand, highlighting the widening gap between what the market can deliver and what is required to sustain growth.

Figure 7 – Current demand for office and lab space is higher than average take-up

Current office and lab requirement in Cambridge compared to average take-up over the last 10-years



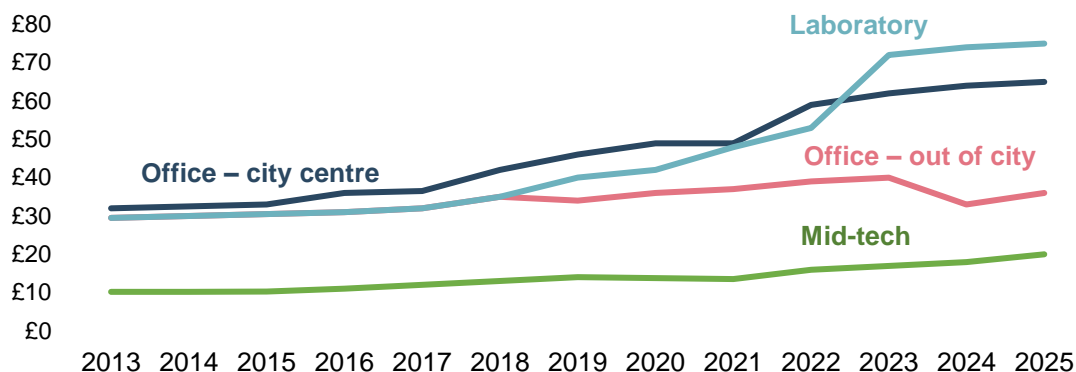
Source: Bidwells, 2024. Offices and Labs: Cambridgeshire – Arc Market Databook

Rising rents due to supply constraints

4.10 The supply-demand imbalance is further reflected in the steep rise in rents across the region. Laboratory rents have increased by 154% since 2013, with city centre office rents up 103% and mid-tech rents rising by 96%. This sharp increase demonstrates the critical need for new, high-quality commercial developments to enable Cambridge to maintain its position as a global leader in innovation.

Figure 8 – Commercial rental values in Cambridge have been increasing substantially

Rental value per sqm of different types of commercial floorspace in Cambridge



Source: Savills, 2024. Spotlight: Golden Triangle Offices & Laboratories

Challenges in the existing commercial supply

- 4.11 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.
- 4.12 Approximately 71% of Greater Cambridge's commercial space was built before 2000, and these properties have the highest availability rates.¹³ In contrast, newer properties constructed within the last decade have much lower availability, reflecting the fast evolving nature of the R&D sector and the strong occupier demand for the right type of modern facilities in the right location. Indeed, vacancy rates buildings built between 2010 and 2020 is 5.6% compared to overall vacancy rate of 7.4%.¹⁴ This imbalance is further highlighted by the shortage of premium "5-star" properties, which have 1.5% availability, while lower-rated properties (1–3 stars) have availability rates around the market average.
- 4.13 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.

Importance of mid-tech and logistics

- 4.14 The recent evidence base update notes that industrial demand "has risen considerably in recent years and supply has failed to keep pace." This is due to growth in manufacturing, warehousing (including e-commerce logistics), and related "mid-tech" uses.¹⁵ Greater Cambridge's booming population and businesses drive more demand for warehouses (for construction materials, consumer goods, lab supplies, etc.), but very little new industrial land has been allocated in the past decade.

¹³ CoStar (2025)

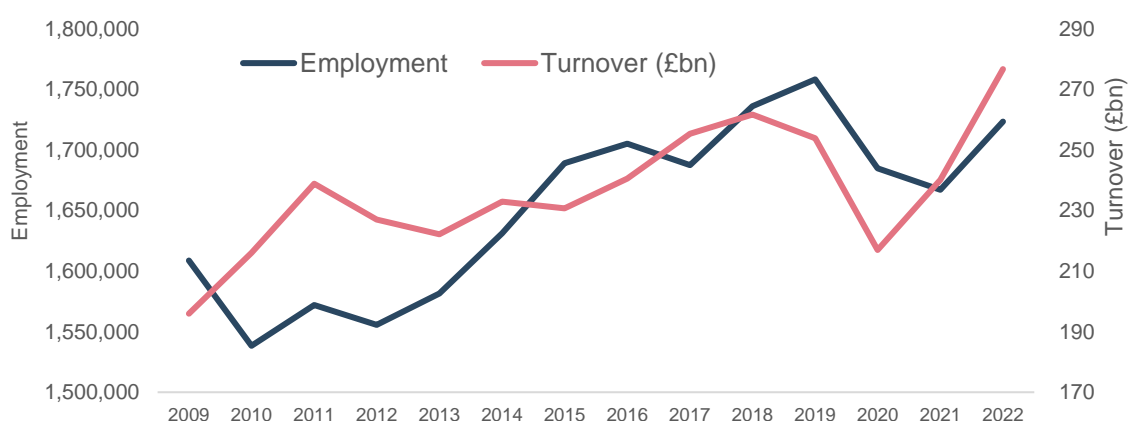
¹⁴ CoStar (2025)

¹⁵ Icen, 2023. Greater Cambridge Employment and Housing Evidence Update

- 4.15 Mid-tech supports R&D by bridging the gap between research and production, providing facilities for prototyping, testing, and scaling innovations, and enabling the translation of discoveries into commercial products. These spaces allow companies spun out of Cambridge's research centres to build things in Cambridge (rather than relocating production elsewhere). It also creates more diverse job opportunities (mid-skilled technicians etc), aligning with inclusive growth goals.
- 4.16 While not yet fully recognised in national policy, mid-tech overlaps significantly with life sciences and advanced manufacturing, spanning use classes between R&D and storage. The sector supported over 1.7 million jobs in the UK in 2022 and generated £277bn in turnover, surpassing pre-pandemic levels. In Greater Cambridge, the mid-tech sector has grown by 61% in employment since 2009, significantly outpacing regional and national averages.
- 4.17 Examples of thriving mid-tech operators in the area include The Technology Partnership (TTP Group) and Cambridge Consultants. TTP, a technology and product development company based in Cambridge with an expanding global presence, has grown its workforce. Meanwhile, Cambridge Consultants – another world-leading product development and technology consultancy – continues to scale its operations and employ hundreds of engineers, designers, and mid-skilled technicians. Their expansions illustrate the dynamic, high-growth nature of mid-tech in Cambridge, highlighting the region's capacity to nurture a broad range of technology enterprises.

Figure 9 – Mid-tech employment and financial turnover has been increasing since 2013

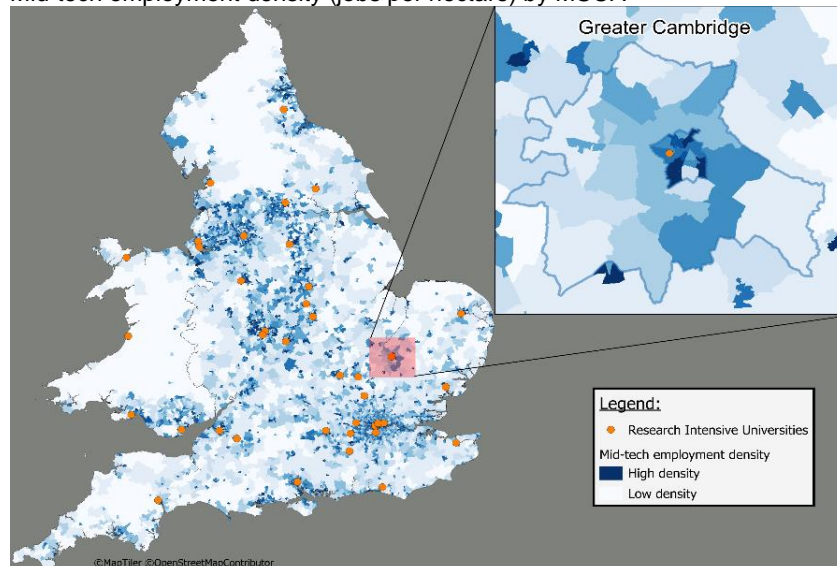
Index growth of mid-tech sector financial turnover and employment (2009 -2022) (2009 = 100)



Source: ONS, 2024. Monthly Business Survey (MBS) turnover of production industries; ONS, 2024. Business Register and Employment Survey 2022

Figure 10 – Cambridge is a hub for mid-tech employment

Mid-tech employment density (jobs per hectare) by MSOA



Source: ONS, 2025. Business Register and Employment Survey.

- 4.18 While we understand Iceni is currently reviewing warehouse and industrial location requirements in Greater Cambridge, their latest work has identified a significant shortfall in such space.¹⁶ This shortfall against the recommended needs by 2041 is estimated to be 149,000 sqm, reflecting suppressed delivery and unmet demand that risks constraining economic growth and key sector support.¹⁷
- 4.19 The South Trumpington proposals present the opportunity to provide for growth within the mid-tech sectors and or to provide facilities which directly support the operations of strategic organisations in the City such as CBC or CUH in such a related and highly accessible location.

Identified need

- 4.20 The current adopted local plans for Greater Cambridge collectively plan for 44,000 jobs between 2011 and 2031, split equally between Cambridge and South Cambridgeshire (22,000 jobs each).
- 4.21 In 2023, the Greater Cambridge Shared Planning “Development Strategy Update” identified a higher employment need, projecting 66,600 additional jobs for the period 2020–2041. This reflects updated evidence and highlights the growing ambitions for the region’s economic development.

¹⁶ Iceni (2023) highlights a critical shortfall of 149,164 sqm in industrial and warehouse space in Greater Cambridge. Despite a need for 200,000 sqm by 2041, supply as of December 2022 is just 56,935 sqm, reflecting suppressed delivery and unmet demand that risks constraining economic growth and key sector support.

¹⁷ Iceni, 2023. Greater Cambridge Employment and Housing Evidence Update

Table 1 – The employment needs across Greater Cambridgeshire have been significantly uplifted at the latest update

Total and yearly employment uplift need

Metric	Greater Cambridge Adopted Local Plans (2011 – 2031)	Greater Cambridge Shared Planning Development Strategy Update (2020 – 2041)
20-year jobs need	44,000	66,600
Yearly uplift	2,200	3,100

Source: Cambridge City Council and South Cambridgeshire District Council, 2015. Development Strategy Update. Greater Cambridge, 2023. Development Strategy Update

4.22 The Government stated on 28 August 2024 that Greater Cambridge has a vital role to play in this Government’s mission to kickstart economic growth. The Cambridge Growth Company has been tasked with identifying the growth capacity of the city region.¹⁸ A core ambition of the Cambridge Growth Company is for one or more contiguous urban extensions of the city [...] in order to maximise the benefits of agglomeration.”¹⁹

Commercial floorspace needs

4.23 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 1.09 million square metres of commercial floorspace between 2020 and 2041, with R&D space accounting for over half of this need.²⁰

¹⁸ Appointment of Cambridge Growth Company Chair: Letter from Matthew Pennycook MP. Published 31 October 2024.
¹⁹ Appointment of Cambridge Growth Company Chair: Letter from Matthew Pennycook MP. Dated 30th October 2024.
²⁰ Iceni, 2023. Greater Cambridge Employment and Housing Evidence Update

Table 2 – R&D accounts for over half of the projected employment floorspace need

Employment floorspace need by sector

Sector	Recommended need (2020 – 2041) (sqm)
Office	289,700
R&D	600,000
Industrial / warehouse	200,000
Total	1,089,700

Source: Icenl, 2023. Greater Cambridge Employment and Housing Evidence Update

Reasons for underestimating commercial needs

4.24 The Icenl report provides valuable insights into Greater Cambridge's commercial space requirements but we believe underestimates true demand due to two key factors.

1 – Suppressed demand due to constrained supply

4.25 Over the past decade, the commercial property market in Greater Cambridge has been supply-constrained within high-demand sectors like R&D, product development, software, robotics and life sciences. This constrained supply has prevented the market from meeting its full growth potential in these key sectors or national and global significance. The concept of suppressed demand arises when a market operates below equilibrium, meaning there is unmet demand that would have materialised had adequate supply been available.

4.26 The Cambridge innovation economy is globally competitive, attracting international firms and contributing about £1 billion annually to the Exchequer. This unmet demand not only risks limiting Greater Cambridge's growth but also challenges the UK's global innovation leadership.

4.27 Net completions over the past decade fail to capture this suppressed demand, as they only reflect the constrained market environment. Historical data indicates that Greater Cambridge could have attracted significantly more growth in key sectors if supply levels had allowed the market to function at equilibrium.

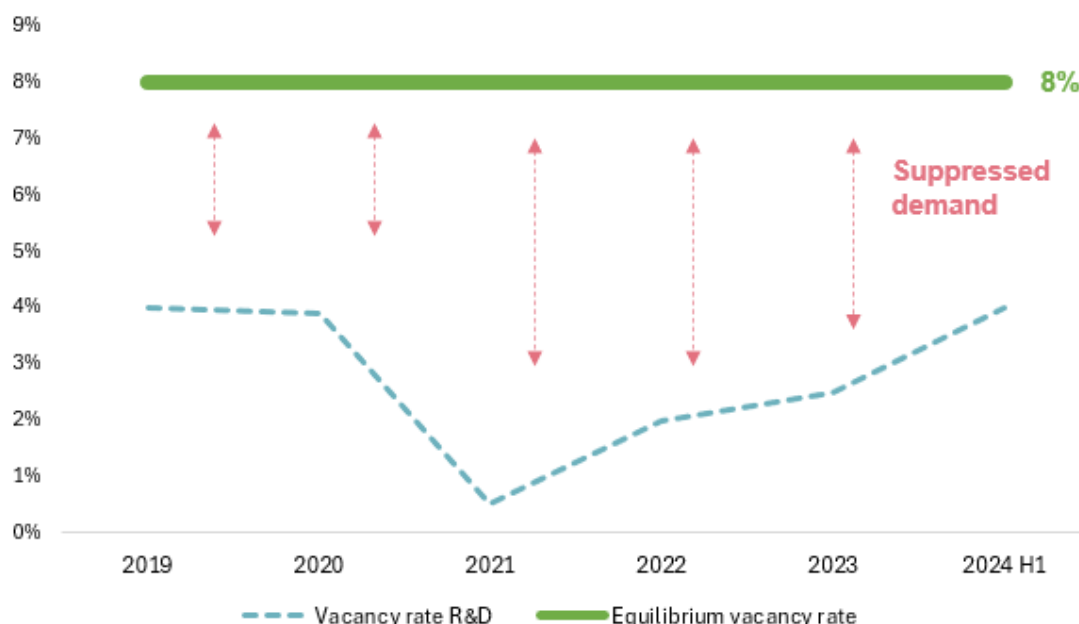
4.28 The equilibrium vacancy rate refers to the level of vacancy that is expected in a well-balanced market where supply meets demand. It represents a healthy market condition where there is enough vacancy to allow for tenant movement and choice without causing significant upward or downward pressure on rental prices. The equilibrium vacancy rate is generally accepted to be 8%.²¹

4.29 The figure below shows that R&D vacancy rates in Cambridge consistently fall below the equilibrium level, highlighting the presence of suppressed demand.

²¹ Savills, 2023. Better forecasting for industrial land needs. This figure has also been used by the London Plan in the EiP.

Figure 11 – More floorspace is required for R&D space in Cambridge to meet its equilibrium vacancy rate, suggesting that there is suppressed demand

R&D vacancy rate in Cambridge relative to equilibrium vacancy rate



Source: Bidwells, 2024. Arc Market Databook July 2024

2 – The need for gross completions

4.30 The IcenI forecasts focus on net additional floorspace, which refers to the net increase in commercial stock after accounting for space lost to conversion or obsolescence. However, this approach does not fully reflect the need for new floorspace, as it overlooks the necessity for gross completions to replace ageing, less desirable, or converted stock.

4.31 The IcenI report itself acknowledges that a dynamic market requires a higher level of gross completions to sustain net growth. Historical data supports this: between 2011 and 2021, gross completions for R&D and B1 mixed-use space in Greater Cambridge exceeded net completions by 15%.²² The table below summarises gross and net completions for different sectors, showing that gross completion have been much higher than net for some sectors. This demonstrates that maintaining a dynamic and competitive market capable of attracting high-value occupiers requires significantly more supply in gross terms than the net figures suggest.

²² IcenI (2023), page 84, table below paragraph 5.19

Table 3 – Gross completions exceed net completions for all floorspace types

Sector	Net completions	Gross completions	Gross-net % uplift
B1 Mix	149,800	181,300	21%
Office	159,000	434,600	173%
R&D	494,800	570,500	15%
Light industrial	3,000	54,300	1,710%
Industrial	-34,700	143,900	—
Warehousing	60,400	181,100	200%
Total	832,200	1,565,700	88%

Source: Iceni, 2023. Greater Cambridge Employment and Housing Evidence Update

- 4.32 Despite this, the Iceni report does not recommend incorporating a replacement allowance, citing positive market outcomes and viability in Cambridge. This position appears inconsistent with the historic data, which highlights the essential role of replacement space in sustaining growth and meeting future demand.

Employment trajectory and supply

- 4.33 The Iceni analysis provided a trajectory of employment floorspace commitments as of May 2024, based on a comprehensive review of planning permissions, local plan allocations, and completions between 2020–2023.²³ This included key sites identified in the First Proposals, such as Cambridge East, CBC, North East Cambridge, and Babraham.
- 4.34 To better understand supply, Iceni segmented commitments into broad demand-side categories by type of space (office, wet lab, dry lab) and sector (e.g., ICT, life sciences). This categorisation reflects the descriptions of developments and promotional material associated with each site, offering insights into how supply aligns with sectoral needs.
- 4.35 The following table summarises the demand and supply balance presented in the Iceni report, with the following key conclusions:
- **Office space:** there is an estimated 25% undersupply of general office space. However, when factoring in the supply of office/dry lab space aimed at ICT and life sciences, there appears to be a potential oversupply. This suggests a strong general office pipeline but highlights a possible longer-term need for more high-quality office provision. Upcoming sites like North East Cambridge and Cambridge East are expected to supplement future supply.
 - **Dry labs (ICT and physical sciences):** the forecast indicates a significant oversupply of dry lab space, particularly in West Cambridge, which may cater more to advanced manufacturing needs than ICT/tech. However, short-term supply has reportedly been limited.
 - **Wet labs (life sciences):** wet lab demand and supply are considered broadly balanced for the near term, following a surge in permissions granted through 2023 and 2024. While there was limited delivery between 2020–2023, the pipeline for 2025–2030 is stronger, with some projects likely to be brought forward post-2030. Despite this, additional wet lab space will likely be needed in the 2030s, reinforcing the importance of new Local Plan allocations at key sites like CBC, North East Cambridge, Babraham, and Cambridge East.

²³ Iceni Projects Limited on behalf of Greater Cambridge Shared Planning (September 2024), Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs.

- **R&D stretch:** the R&D stretch component is above “labour demand models” to allow flexibility and market choice. There is a need for sites to come forward post 2030 but Iceni expect future local plan sites to meet this need.

Figure 12 – Demand and supply estimates presented by the Iceni report

Type	Demand 2020-41 (sqm)	Floorspace supply commitments (sqm)	Completions 2020-23	Balance
Office (inc losses)	265,300	177,162	27,552	-60,586
Dry lab / ICT / physical science inc. West Cambridge	28,500	287,784	20,966	+280,250
Office / dry lab (dedicated to life science)	24,400	154,522	-	+130,122
Wet labs (including CBC / genomic dry labs)	423,800	359,795	24,845	-39,160
Mix / not categorised	-	87,761	-	+87,761
R&D stretch	147,700	-	-	-147,000
Total	889,700	1,044,338	73,363	+228,001

Source: Iceni, 2023. Greater Cambridge Employment and Housing Evidence Update

- 4.36 The suggestion in the key sector report of a balanced demand and supply trajectory for office and lab space is overly optimistic and does not fully account for delivery challenges. Historically, delivery rates in Greater Cambridge have consistently fallen short of planning consents, with many approved projects either delayed or never reaching completion. Research from Savills found that just two out of 10 employment site in South East England and East Midlands were able to deliver at least half of the proposed capacity within a 10 year timeframe.²⁴ This pattern highlights a persistent gap between theoretical supply and what is actually delivered to the market.
- 4.37 Moreover, a significant portion of Greater Cambridge’s lab stock is occupied by public institutions or owner-occupiers, such as universities or research organisations, which means these facilities do not enter the open commercial market. This reduces the availability of space for private sector firms, particularly for growing companies in life sciences and technology sectors, further straining the already tight supply-demand dynamics.

Summary

- 4.38 While the Iceni reports provides a valuable foundation, 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. This underscores the importance of sites like South Trumpington in providing the flexible, high-quality spaces needed to support the region’s strategic growth sectors.

²⁴ Savills (November 2023), Coldham’s Lane Market Report.

4.39 We plan to explore these findings further with the Greater Cambridge Shared Planning Service (GCSPS) as part of the Local Plan process, ensuring that emerging evidence on specific demand and supply constraints is fully considered. By linking this analysis directly to the Local Plan, we can help shape a more robust and responsive strategy that addresses the region’s dynamic growth needs.

Housing need

In order for Greater Cambridge to perform its role in contributing to the UK economy, new and affordable housing is critical for it to reach its full potential and ensure that national, regional, and local objectives are met

Greater Cambridgeshire: a victim of its own success?

4.40 Greater Cambridge has seen rapid population growth since 2000, which has placed pressure on its housing supply. As illustrated in **Table 4**, this population growth in Greater Cambridge has been fuelled by working age residents. Overall, the number of working age residents in Greater Cambridgeshire increased by 13% between 2013 and 2023, compared to 6% across the East of England, and 5% across England.²⁵

Table 4 – Population increase across Greater Cambridgeshire has been driven by working age residents

Population growth by age group and geography (2000 – 2023)

Area	Aged 16 to 24	Aged 25 to 49	Aged 50 to 64	Aged 65+
Cambridge	31.7%	46.1%	42.3%	17.8%
South Cambridgeshire	17.7%	15.1%	36.8%	76.2%
East	14.2%	9.0%	31.8%	46.8%
England	16.2%	7.3%	31.2%	38.5%

Source: ONS, 2023. Population estimates – local authority based by single year of age

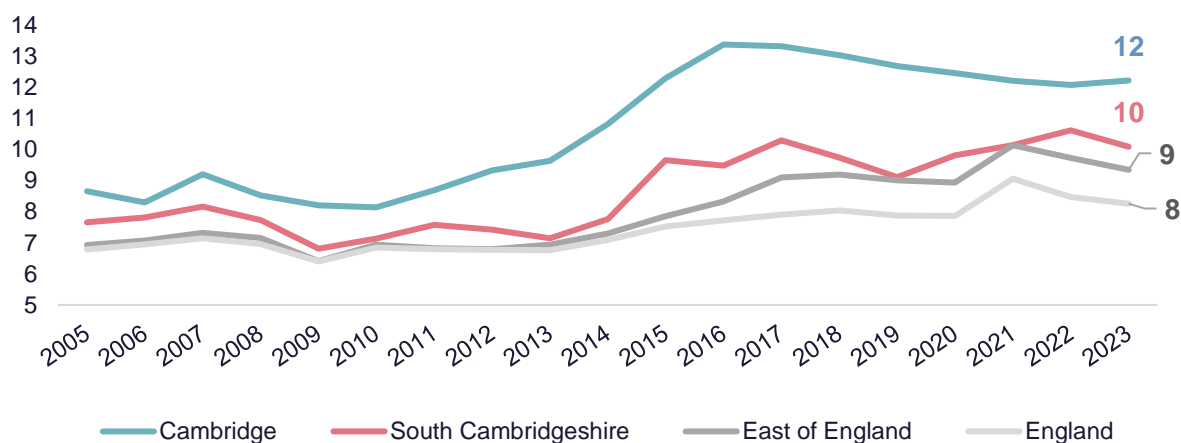
Greater Cambridge affordability

4.41 The house price to earnings (HPE) ratio is a metric used to assess the affordability of housing in a particular market. It compares the median or average house price The area to the median or average annual earnings of households in that area. A high HPE ratio suggests that houses are expensive compared to local incomes, indicating potential affordability challenges for prospective homebuyers. Cambridge (12) and South Cambridgeshire (10) have a higher HPE ratio relative to regional (9) and national rates (8).

²⁵ ONS, 2023. Population estimates - local authority based by single year of age

Figure 13 – The house price to earnings ratio in Cambridge has grown at a much faster pace than geographical comparators

House price to median earnings ratio across geographies (2005 – 2023)



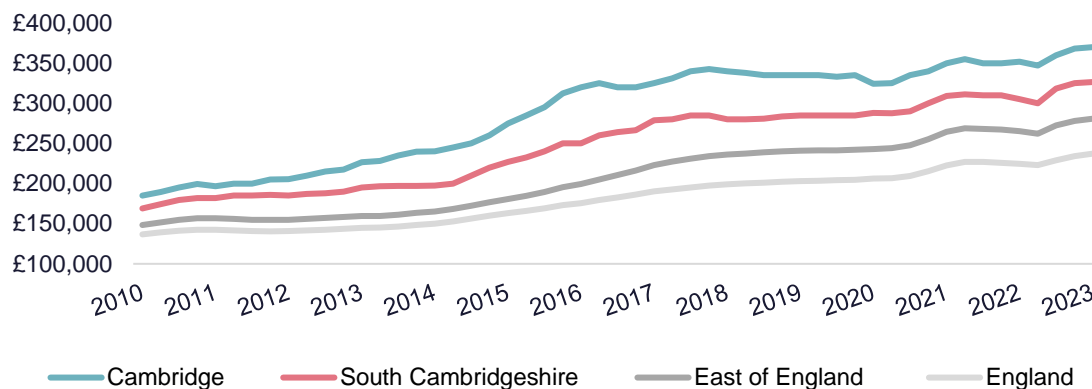
Source: ONS, 2024. *Housing affordability in England and Wales: 2023*

An expensive place to live

- 4.42 The East of England has some of the highest house prices in England, coming third out of the nine regions. The median house price in the region is £342,500, 18% higher than the national average of £290,000. Within the East of England there are distinct clusters of unaffordability. The areas on the boundary of Greater London, for example, have high median house prices, whilst most areas in the north of the region have relatively lower house prices.
- 4.43 As employment has grown at a faster rate than the housing stock, Greater Cambridgeshire has become another one of these clusters of unaffordability, with the city itself having a median house price of £493,000. This rise in house prices has not been matched by wage growth, contributing to unaffordable nature of the area.
- 4.44 This is particularly clear for entry level housing. Lower quartile house prices in Cambridge and South Cambridgeshire are within the top 11% and 20% of all local authorities, respectively. **Figure 14** illustrates how the price of entry-level housing has increased over time.

Figure 14 – The price of entry-level housing in Greater Cambridgeshire has increased at a rapid pace

Lower-quartile house prices across geographies over time (2010 – 2023)



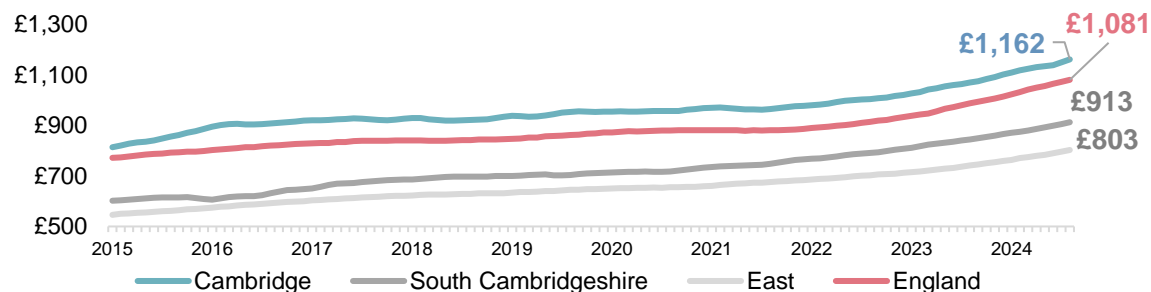
Source: ONS, 2023. Lower quartile house prices for administrative geographies: HPSSA dataset 15

High rents alongside high house prices

- 4.45 Rental prices across Greater Cambridgeshire are also expensive relative to geographical comparators. The average rent in Cambridge is £1,700 per month, higher than the regional and national average of £1,200 and £1,300, respectively. This places Cambridge in the top 9% most expensive local authorities in England.
- 4.46 Whilst cheaper than Cambridge, rents in South Cambridgeshire remain above the regional average, standing at £1,300 per month. This places South Cambridgeshire in the top 27% most expensive local authorities in England.
- 4.47 The two local authorities are amongst the most expensive in the East of England to rent in, with Cambridge only being surpassed by St Albans and being equal to Watford. St. Albans and Watford are influenced by their proximity to London, leaving Cambridge is the most expensive non-commuter town in the East to rent in.
- 4.48 These high costs extend across the rental stock, with entry level properties being more expensive in Cambridge than in comparator geographies.

Figure 15 – The rental price of an entry level property is above the national average

Monthly rent for a one-bedroom property by time and geography



Source: ONS 2024. Private rental market summary statistics in England

What is the overall need?

Current local plans

4.49 The currently adopted local plans for Greater Cambridgeshire collectively plan for 34,000 homes between 2011 and 2031.

Table 5 – Employment targets in the currently adopted Local Plans

Area	Homes
Cambridge	14,000
South Cambridgeshire	22,000
Greater Cambridge	34,000

Source: Cambridge City Council, 2018. Cambridge Local Plan; South Cambridge District Council, 2018. South Cambridgeshire Local Plan 2018

Forthcoming Local Plan

4.50 As previously mentioned, the first proposals for the Greater Cambridge Local Plan were published in 2021. In January 2023, Greater Cambridge Shared Planning published a 'Development Strategy Update' which suggested that anticipated levels of employment were higher than initially thought. The Development Strategy Update suggested that Greater Cambridge should plan for 52,000 additional homes between 2021 and 2041.

Table 6 – Indicative housing targets in forthcoming local plans

Area	First proposals (superseded) (2021)	Development Strategy Update (2023)
Greater Cambridge	44,400	52,000

Source: Greater Cambridgeshire Shared Planning, 2021. Greater Cambridge Local Plan – First Proposals; Greater Cambridge Shared Planning, 2023. Greater Cambridge Local Plan: Development Strategy Update

4.51 In the revised standard method introduced in December 2024, the annual housing target for Greater Cambridge was adjusted from 1,726 to 2,309 homes. This updated figure aligns more closely with the region's assessed housing need of 2,463 units per year (Development Strategy Update). A buffer has also been introduced which means the GCSP service needs to be able to demonstrate a supply of just over 12,100 homes in Greater Cambridge over five years.

4.52 GCSP reported in April 2024 that the housing trajectory from 1 April 2024 to 31 March 2029 was 11,190 homes. At that time this resulted in a demonstrated supply of 6.5 years.²⁶ However, now the supply has fallen to just under five years.²⁷ As such the balance is "tilted" in favour of giving planning permission where

²⁶ Greater Cambridge Shared Planning (April 2024), Greater Cambridge Housing Trajectory and Housing Land Supply Report

²⁷ <https://www.scambs.gov.uk/news/councils-provide-update-on-planning-targets-for-housebuilding-in-greater-cambridge>

the development is of high quality and in sustainable locations. GCSP is reviewing their housing trajectory ahead of a published report in April 2025 and expect to be able to demonstrate a five year land supply.

5. Why here?

The South Trumpington site is a unique opportunity to deliver high quality commercial space and housing in an accessible location near key employment centres.

The evolving geography of innovation

- 5.1 Recent years have only increased the critical role that geography plays in driving collaboration and innovation. In the wake of the pandemic, demand for laboratory and office space has increasingly centred on high-quality, sustainable locations that support a collaborative culture and meet the environmental, social, and governance (ESG) standards of both investors and skilled workers. Over the past 50 years innovation has been spatially dominated by clusters such as Silicon Valley – suburban corridors of isolated campuses, accessible only by car and with limited emphasis on quality of life. But the geography of innovation is changing – a new model, innovation districts, urban areas with clusters of knowledge-producing organisations, has taken over. Out of town business and science parks are still important to the economy but they are increasingly legacy models of growth.
- 5.2 The concept of clusters – ecosystems of interconnected firms, individuals, and institutions – is widely recognised as a key driver of economic growth in modern, knowledge-based economies. Innovation is, in many respects, a “contact sport” that thrives on informal interactions, proximity, and shared resources. The Bidwells/YouGov R&D Business Survey (2021) highlights that the most sought-after science and city district locations now offer strong public transport links, a high quality of life, and ready access to complementary businesses and research institutions.²⁸ Organisations place greater weight on these factors to extend recruitment reach, entice highly skilled staff, and enable the cross-pollination of ideas essential for cutting-edge R&D.
- 5.3 In this context, the South Trumpington site exemplifies the attributes that modern innovation clusters demand. It has excellent active travel and public transport connections and offers an amenity-rich masterplan designed to support healthy lifestyles. By providing flexible, state-of-the-art employment space for labs, R&D, office, mid-tech and supporting space in a sustainable setting, it offers the foundations for a next-generation innovation district, poised to meet global challenges and remain competitive on the international stage. It offers the potential for a new highly accessible district in its own right, and/or one that can complement and build upon the success of nearby clusters such as CBC.

Locational advantages and connectivity

Why South Trumpington?

- 5.4 Future development at South Trumpington offers a prime location for sustainable development, supported by a strong foundation of existing and emerging transport infrastructure. The area benefits from established connectivity features such as the Trumpington Park and Ride, the guided busway linking to the CBC and Cambridge Railway Station, and a well-integrated network of local cycle routes. Its proximity to the strategic road network further enhances regional accessibility, making it an ideal location for future growth.

²⁸ <https://www.scams.gov.uk/media/23640/cd833-appellant-proof-of-evidence-need.pdf>

- 5.5 The transport links are set to improve even further with several planned projects, including the South West Travel Hub, the Cambridge South Railway Station, the Melbourn Greenway, and the East-West Rail. These enhancements will strengthen the site's connectivity and ensure its alignment with broader regional and national transport strategies.

Local accessibility

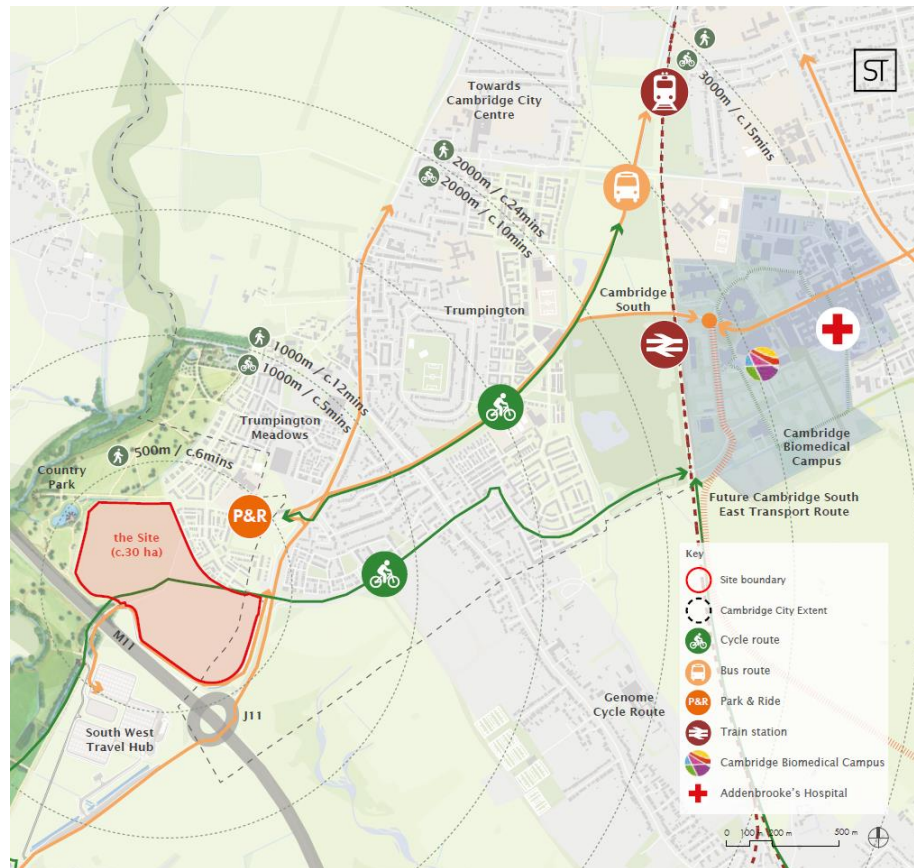
- 5.6 Future development at South Trumpington is well-positioned to support local living and reduce reliance on private vehicles. It is near essential local facilities, such as schools and shops, and has the potential to facilitate further innovation and knowledge sharing with major employment centres like the CBC through further clustering. The development will integrate mixed-use elements, combining jobs, leisure, and residential spaces. This design ensures that residents can meet their daily needs within walking or cycling distance, supporting a sustainable and community-oriented lifestyle.
- 5.7 The accessibility of South Trumpington is complemented by its thoughtful layout, which incorporates public amenities alongside sustainable transport routes. The integrated design will also attract a wide range of users, from families to professionals working at nearby employment hubs.

Healthy living and active travel

- 5.8 A central feature of the proposals are their emphasis on active travel and healthy living. Future development can be integrated with an extensive network of active travel routes that connect it to key destinations, including Cambridge City Centre via Trumpington Road, the Cambridgeshire Guided Busway, Addenbrooke's Road, and the Melbourn Greenway. These routes will provide seamless connections to leisure and employment hubs, including the CBC.
- 5.9 South Trumpington also benefits from its proximity to recreational routes, such as those at Grantchester Meadows and Trumpington Meadows. These leisure routes promote physical activity and create opportunities for outdoor exploration, making South Trumpington an attractive location for families and professionals.

Figure 16 – The Site is well-connected by active travel routes

Active travel routes in and around the Site



Masterplan design principles

- 5.10 The masterplan for South Trumpington incorporates innovative design principles to promote sustainability and enhance the quality of life for residents. Parking areas will be consolidated into residential podiums and a dedicated Mobility Hub, minimising surface-level parking and freeing up space for active uses. Streets within the development will prioritise walking and cycling, creating child-friendly environments that encourage community interaction and outdoor activity.
- 5.11 Dedicated cycle routes will provide direct connections to key corridors and gateways, ensuring that cycling remains a convenient and efficient travel option. In addition, the development will feature public transport hubs that seamlessly link South Trumpington to the South West Travel Hub and the busway.

High quality environment and placemaking

- 5.12 The masterplan at South Trumpington prioritises sustainability and quality of life. It integrates mixed uses – housing, employment space, and leisure – so that residents can meet their daily needs within walking or cycling distance.

- 5.13 The site is adjacent to Trumpington Meadows and will provide an extension to the country park, significant provision of public open space, and a rich and diverse habitat for wildlife. It will also provide new local community infrastructure.

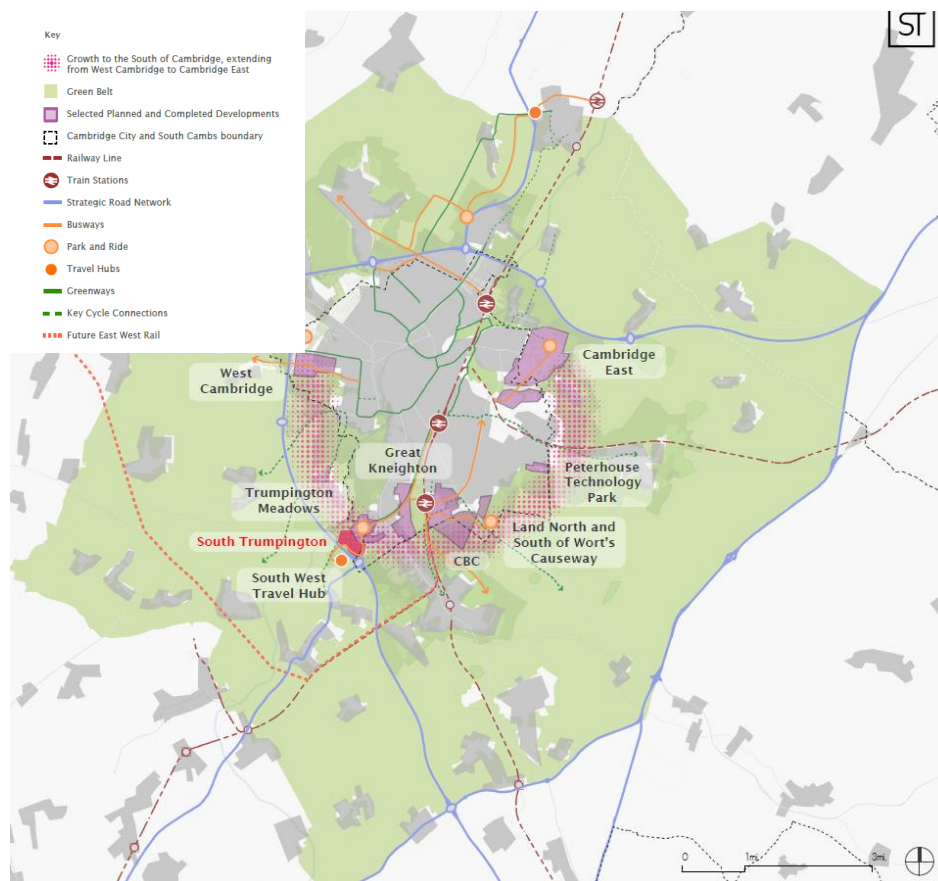
Proximity to clusters and growth areas

- 5.14 One of the key remits of the CGC is to ensure that “one or more contiguous urban extensions of the city must be core components of the vision the Growth Company brings forward, in order to maximise the benefits of agglomeration.”²⁹ Agglomeration refers to the phenomenon where businesses, particularly those in knowledge-intensive industries, benefit from clustering together. This clustering drives productivity through creating opportunities for innovation, collaboration and sharing resources. It allows firms to exchange ideas, attract skilled workers, and access specialised suppliers, creating a self-reinforcing cycle of growth. In modern economies, agglomeration is one of the most significant drivers of economic performance, particularly in high-value sectors such as life sciences and advanced manufacturing.
- 5.15 This is recognised in the Iceni key sectors locational needs report which states that one of the key locational needs for life science firms is “[f]or some businesses, the need to be in close proximity to clinical research centres such Cambridge Biomedical Campus, but others require a location with academic research or in a broader commercial non-clinical campus, depending on sector specific focus.”
- 5.16 South Trumpington is strategically to be accessible to – via dedicated active travel and public transport routes to CB1, and a wide range of established and emerging clusters such as CBC, placing it in a prime position to support agglomeration. This proximity allows firms to leverage the benefits of being part of a world-renowned innovation cluster. For example, businesses can access cutting-edge research, collaborate with leading academic and clinical institutions, and integrate into an established network of life sciences and biotech firms. This alignment with the government’s focus on supporting strategic growth clusters ensures that South Trumpington contributes directly to innovation and collaboration in the region.

²⁹ Appointment of Cambridge Growth Company Chair: Letter from Matthew Pennycook MP. Dated 30th October 2024.

Figure 17 – The site is in a prime location to support agglomeration

The Proposed Development in the wider Cambridge cluster



Need for new homes near employers

- 5.17 The previous section showed the need for new homes in Greater Cambridge to support the growing population. These homes must be provided in the right locations, near major employment centres, to retain and attract talent.
- 5.18 One prominent example is that of CBC, where their own Housing Study identified that many of the 22,000 employees struggle to find housing and the limited affordable housing options affects the ability of CBC employers to recruit and retain staff.³⁰ Key findings from the CBC housing study include:
- Entry-level (lower quartile) house prices in Cambridge are 13.7 times the earnings for CBC workers, and this ratio rises to 14.8 times for those in the lower-income brackets within the health sector, emphasising the dire state of housing affordability for key workers;
 - 38% of workers at CBC describe their ability to meet current housing costs as 'moderately stretched' (27%) or 'very stretched' (11%);

³⁰ Lichfields (April 2024), Cambridge Biomedical Campus Housing Study.

- 30% of CBC workers are currently unable to afford rents in the open market and are therefore in need of affordable rented housing; and
- 14,000 – 16,000 affordable homes are needed to meet current and future needs of CBC employees.

5.19

Whilst the site is well located to potentially support CBC's own housing needs, the above is one example across the City, that would apply equally to other sectors and businesses. British Land is committed to working with the Greater Cambridge authorities to discuss their housing need, and ensure future development at South Trumpington makes the most positive impact. Placing housing near workplaces reduces commuting distances and car dependency. This is key for a sustainable future, and cannot be recognised in all locations.

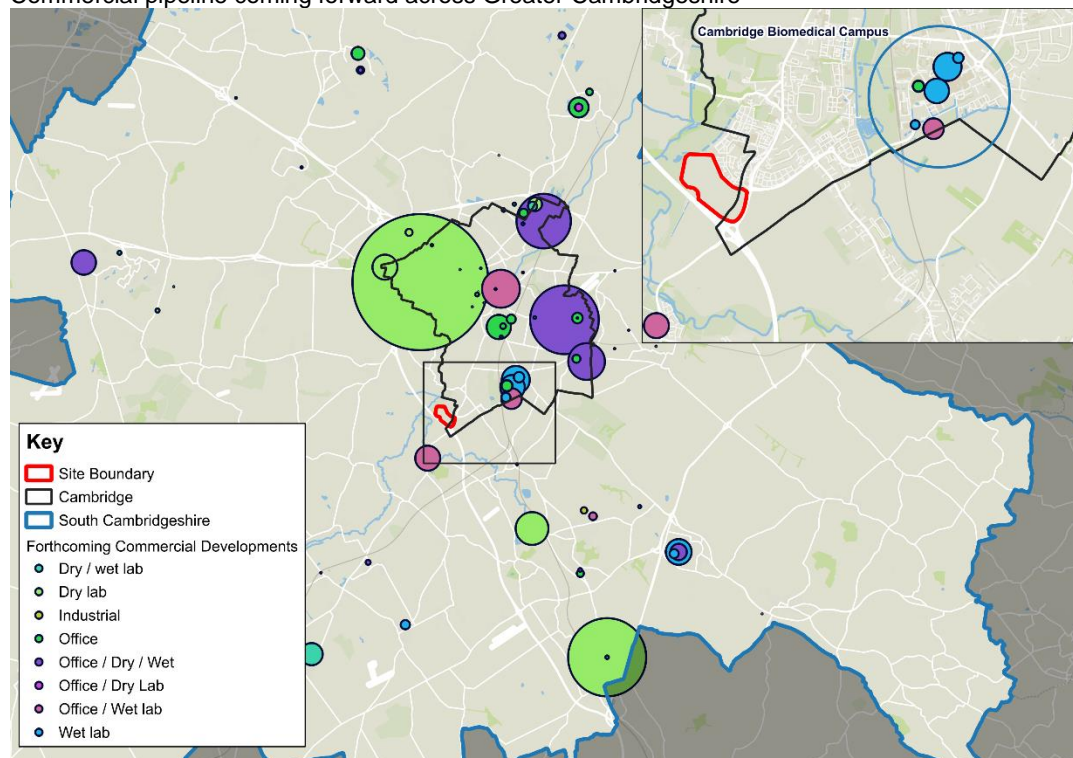
Pipeline gap

5.20

Analysis of the Greater Cambridge commercial and housing pipeline suggests that supply is concentrated in central and western parts of the city. As the figure below shows, the commercial pipeline is largely elsewhere in GC. The Site is well placed to provide a better distribution of development and benefit from agglomeration benefits, for example with CBC and other nearby employers.

Figure 19 – The commercial pipeline coming forward across Greater Cambridgeshire is weighted towards central and western Cambridge

Commercial pipeline coming forward across Greater Cambridgeshire



Source: Volterra research

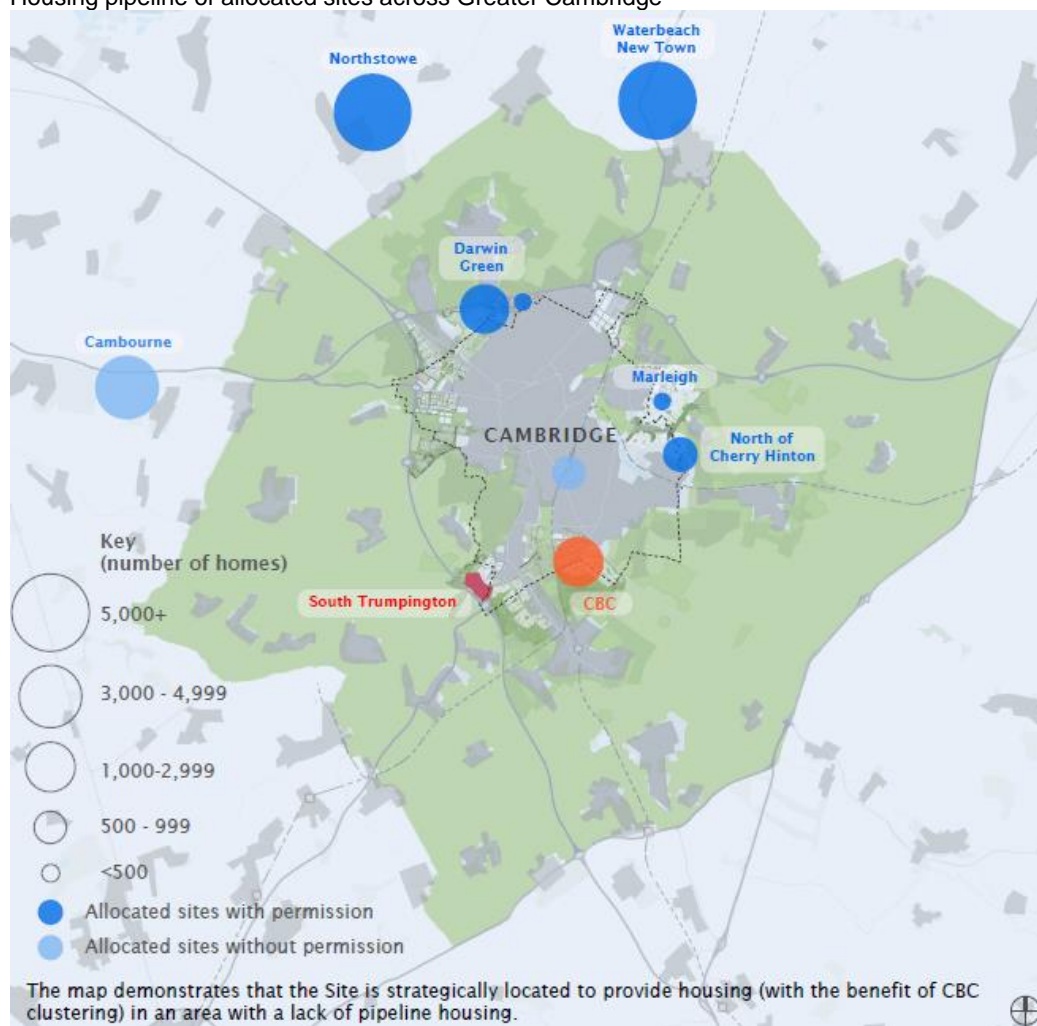
5.21

The same applies to housing. To date, there has been a missed opportunity in delivering residential development in the south of Cambridge, where active/public transport is strong and being enhanced through the delivery of the southwest travel hub and Cambridge South Station. This serves the potential to locate

new housing in the most accessible locations alongside jobs and clusters of development such as CBC, where there is one possible example here to help fully capitalise on the potential of the campus. The key is getting the correct type of residential development in the right location, to ensure the staff working in key sectors and clusters such as CBC can readily access work, and businesses can reach their full potential. The figure below shows that there is limited pipeline near the site.

Figure 18 – There is a limited housing pipeline in the area surrounding CBC

Housing pipeline of allocated sites across Greater Cambridge



Need for world class space that attracts global investment

5.22

Future development at South Trumpington would deliver the highest quality commercial workspace alongside amenity space. This place-based approach is critical in attracting global firms, who increasingly seek high-quality, flexible space that supports collaboration and staff well-being.

5.23

Overall, South Trumpington's potential to integrate commercial and residential development, proximity to major employment centres, robust transport connections, and strong emphasis on placemaking positions it as a critical site for Cambridge's future. By delivering the right type of space – in the right place – the development will address housing needs, support agglomeration, and help the city maintain its status as a global innovation leader.

A deliverable proposition in the right location

Commercial contribution

The Proposed Development would provide up to 260,000 sqm (GEA) of versatile commercial floorspace for offices, labs, retail, conference and public use.

Under the Illustrative Development Option, indicative estimates suggest that the Proposed Development could support:

3,800 – 6,700

new jobs created directly by the development. Workers are expected to generate £9m - £17m in annual worker expenditure.

4,400 – 7,700

net additional jobs, with 2,400 – 4,300 likely to be filled by Greater Cambridge residents, accounting for job shifts (displacement) and new economic activity (multiplier effects).

£316m - £573bn

in annual GVA generated by the commercial uses.

£95m - £229m

in annual tax receipts supported by the commercial operations.

Housing contribution

The Proposed Development will deliver between 400 and 1,000 homes

which would provide affordable housing.

This contribution would represent between 17% and 43% of Greater Cambridge's annual housing requirement.

The Proposed Development would high-qualitying offer, complete with strong amenities and a high quality environment.

The housing offer would be strategically placed to support major employment sites such as the Cambridge Biomedical Campus.

This housing would be brought forth in an area with a weak housing pipeline.



Conclusion

There is an urgent need for high quality office space, and homes in an accessible location. If this is not provided in the right location, then Cambridge, and potentially the UK, will lose out to other innovation districts.

7. Conclusion

- 7.1 Greater Cambridge stands at a key crossroads, with a real opportunity to harness its world-class innovation ecosystem, address critical housing needs, and cement its position as a global leader in research and technology. The government has recognised the area's vital role in driving national economic growth, with the Cambridge Growth Company tasked with unlocking the city's full potential. At the same time, the vision for an Oxford-Cambridge Supercluster is demonstrating the growth aims of the wider arc. However, this success is under threat. Without the right commercial space and housing, the city risks losing investment, talent, and businesses – not to other parts of the UK, but to competing global clusters. Growth will move abroad rather than elsewhere in the UK if it cannot be located here.
- 7.2 The challenge is clear – demand for employment space is far outpacing supply, and housing is unaffordable for most. A significant shortfall in lab, office, and mid-tech space is constraining economic growth, while rising costs are making it harder for key workers to live near their jobs. A prime and recognised example of this pressing need is in the south of Cambridge, where the CBC is set to grow by 30,000 jobs. Yet, there has been a long-standing failure to deliver housing and workspace at scale in this part of the city, missing a major opportunity to capitalise on the benefits of clustering. Without intervention, this imbalance will worsen, making it harder for the UK to retain its competitive edge in high-growth sectors like AI, genomics, and advanced manufacturing.
- 7.3 Future development at South Trumpington provides a unique opportunity to deliver sustainable, well-connected growth in the right location. The development will deliver a strategic extension of Cambridge, integrating employment space for R&D, mid-tech, and logistics to support the wider innovation ecosystem. Its proximity to several large employers and established clusters such as CBC, alongside emerging transport infrastructure like Cambridge South Railway Station and the East-West Rail, ensures that businesses, researchers, and workers can operate in an environment that encourages collaboration and efficiency. The government has been clear that future development in Greater Cambridge must include contiguous urban extensions to maximise agglomeration benefits, and South Trumpington is ideally positioned to achieve this.
- 7.4 Beyond employment, this site will deliver much-needed housing, with the potential to provide affordable and/or key worker housing. This commitment could provide a real solution to the recruitment and retention challenges facing critical employers, ensuring that the city's economic success is matched by an inclusive and sustainable housing offer. Future development will also embrace mixed-use principles, creating a vibrant, high-quality environment with access to green space, community amenities, and active travel routes, reducing reliance on private cars and embedding sustainable growth.
- 7.5 If Greater Cambridge is to realise its full potential, it must deliver the space to support it. South Trumpington offers a deliverable, strategic, and well-planned solution to the city's most pressing challenges. Without action, the UK risks losing a once-in-a-generation opportunity to cement its place as a global leader in science, technology, and innovation. With it, Cambridge can continue to power the nation's economic future.



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