



# Station Fields Economic Case

January 2026





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<b>Date:</b>	9 <sup>th</sup> January 2026
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# Executive Summary

## Station Fields: Increasing labour supply to catalyse the growth of the Cambridge Biomedical Centre (CBC)

### Proposed Development



**2,000 Homes**

Over 15 years, including 40% Affordable



**5,000 sq. ft**

Employment and community space



**Commercial Floorspace**

To support SMEs, including flexible workspace



**New Social Infrastructure**

To support the local community



### Local Drivers for Change



“Default yes” for housing around stations



Housing and support for economic growth central to Labour Government’s new manifesto



National support for life sciences, recognising its economic potential



Cambridge and the CBC recognised in policy as central to the success of life sciences



Significant economic uncertainty and need for jobs now

### Labour Supply Impacts (2k homes)



**5,000**

Increase in resident population



**3,200**

Increase in working age population



**2,700**

Rise in economically active population



**3,200**

Rise in people qualified to level 4+

### Operational and Fiscal Impacts



**195 Jobs**

Supported through employment generating uses



**£123.7m NPV**

Household Expenditure



**£97m NPV**

In GVA through job creation



**£17.3m NPV**

Council tax receipts

### Wider Impacts



Increasing labour supply to catalyse growth of the Cambridge Biomedical Centre



Supporting agglomeration and productivity growth



Supporting new infrastructure including a bridge bypass for Foxton



Providing much needed homes in a sustainable location next to rail



Ability to start contributing to economic growth now

Image source: Cambridge Biomedical Campus Official Website

# 1 Introduction

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## Purpose of Report

Lanpro, on behalf of Axis Land Partnerships (Axis) are preparing an evidence base to support the promotion of development at Station Fields (the 'site'), which is located in Foxton, Cambridgeshire. The site has the potential to deliver up to 2,000 homes along with employment (including co-working space) and community uses.

The site is situated 10km from central Cambridge and 8km from the Cambridge Biomedical Campus (CBC). CBC is a Centre of biomedical research of international importance, recognised as such in government policy (Case for Cambridge, 2024). Around 22,000 people are currently employed on the campus, and CBC has an ambition to double their workforce over the next 20 years. A major constraint on growth is the ability of employees to get from their homes to the campus.

Most of the new housing proposed is to the west and north of Cambridge. There are two major transport projects that would link any new housing to CBC. The first is the Cambridge South East Transport (CSET) busway, however this is still awaiting formal approval. The second is East West Rail, with the final Phase of the project connecting Cambourne to Cambridge at the planning stage and still subject to DCO approval, with funding yet to be fully agreed. This suggests that both will not be operational for many years.

The draft Greater Cambridge Local Plan Regulation 18 consultation document published in November 2025 does not allocate Station Fields for development. Lanpro, on behalf of Axis, is preparing a response to the consultation in support of the Site. This report will inform the response, helping to make the economic case for the Proposed Development. It focuses on two key points which are as follows:

- The site has the potential to support the future growth of CBC, with Station Fields able to come forward within the next 5 years. Other sites are likely to take far longer to come forward as they are dependent on investment in major infrastructure.
- The site would be located in close proximity to the existing Foxton railway station which will connect to the new Cambridge South station (located at CBC). Government policy makes a strong case in favour of locating new residential development close to railway stations. This has been most recently reinforced in the draft NPPF published in December 2025 and the Planning and Infrastructure Act which received Royal Assent in December 2025.

This report has been prepared by GC Insight, a purpose-driven social enterprise offering advisory, research and evaluation consultancy. We have over 20 years' experience of informing and supporting local economic growth through the application of our analysis and insight. We have a national presence with offices in London, Birmingham, Manchester, and Glasgow.

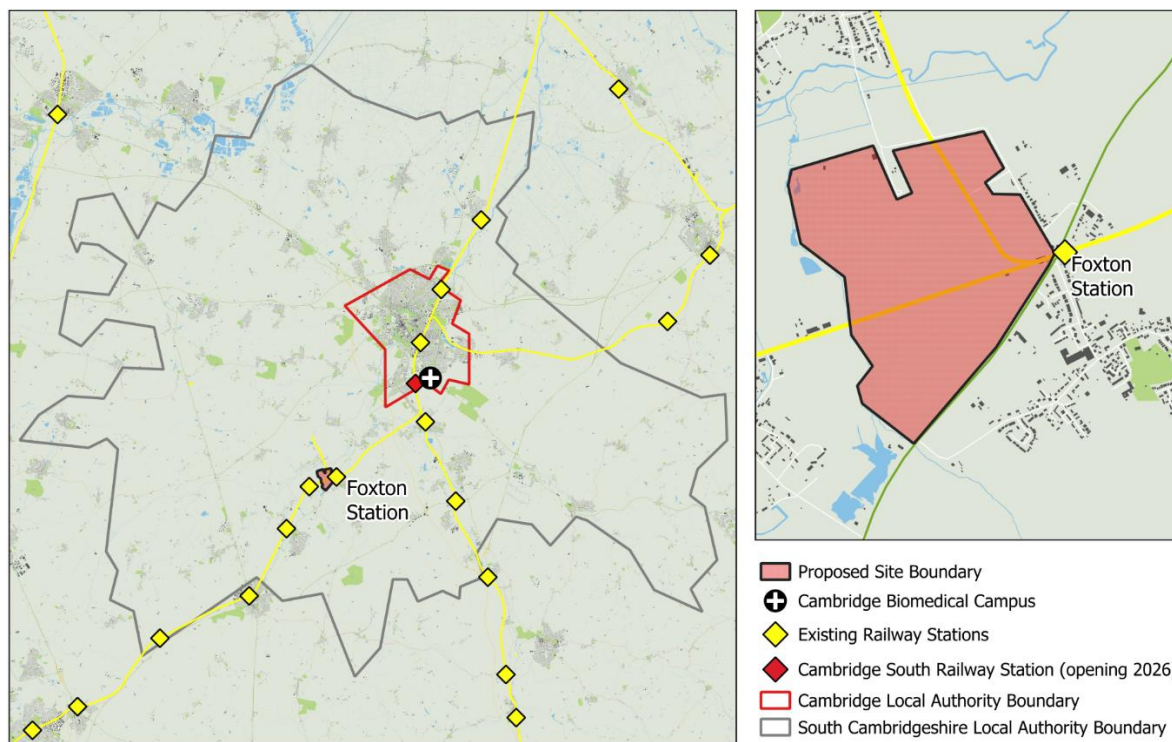
## The Site and its Location

The site is located between the villages of Foxton, Shepreth and Barrington, to the southwest of Cambridge. It is 10km from central Cambridge and 8km from the Cambridge Biomedical Campus (CBC). The site is around 99 hectares in size and lies outside of the Cambridge Green Belt.

Station Fields is located adjacent to Foxton railway station, meaning that it can be accessed within minutes by foot. The station links Cambridge to London's Kings Cross, with two services per hour during peak times. The new Cambridge South railway station, which will be located on the CBC site, is planned

to open in June 2026. The new station will connect the CBC directly with destinations including London, Stansted Airport, and Birmingham. Services between Foxton and Cambridge South will take approximately 7 minutes. In addition, Foxton is linked to CBC by a cycle path.

Figure 1.1 Site Location



## Overview of Proposed Development

Early-stage versions of the masterplan for Station Fields suggest that the site has the potential to deliver the following:

- Up to 2,000 homes over a period of 15 years, 40% of which will be affordable.
- 5,000 sq m employment and community uses, with around three quarters allocated for E class uses (including retail, office and light industrial) and a quarter allocated for community uses. The commercial provision will include space for small businesses (including flexible workspace). The community space will meet local needs. Initial discussions have focused on the potential for a health centre, but the exact community use will be determined at a later stage and subject to a needs assessment.

## Report Structure

The remainder of the report is set out under the following headings:

- **Section 2: Key policy and economic drivers:** summarises the comprehensive policy framework and the socio-economic drivers which help make the case for the Station Fields development.
- **Section 3: The Cambridge Biomedical Campus (CBC):** provides an overview of the Campus and sets out why housing is needed to support its future growth.

- **Section 4: Comparative advantage over other sites:** considers the alternative sites as identified in the Draft Greater Cambridge Local Plan and sets out why Station Fields is better placed to meet the needs of CBC.
- **Section 5: Delivering significant economic benefits:** sets out why there is a need for jobs and economic growth now and quantifies the social and economic impact which could be realised by the development of Station Fields.
- **Section 6: Delivering wider benefits:** articulates the important wider benefits which could be realised by bringing forward the Station Fields development.

## 2 Key Policy and Economic Drivers

The proposed development at Station Fields is supported by a comprehensive policy framework that prioritises housing delivery, economic growth, and sustainable development. This section sets out the policy case for the site, demonstrating its alignment with national, regional, and local objectives. It also summarises the key socio-economic drivers which support the case for Station Fields. The analysis is organised under five key themes:

1. The case for Housing
2. Policy support for Housing close to Rail Stations
3. Policy support for economic growth
4. National support for Life Sciences
5. The importance of Cambridge and the case for the Cambridge Biomedical Campus

Further detail is provided in Appendix 1 and 2 of this report.

### The case for Housing

#### National Policy Drivers

Housing delivery is a cornerstone of the UK Government’s growth agenda. The Labour Government’s **Plan for Change** (2024) and **Our Plan to Build Homes** (2024) commit to delivering **1.5 million homes during the current Parliament (to 2029)**. Building more homes is a key driver for supporting the realisation of the Government’s number one mission of growing the economy.

The **Planning and Infrastructure Act** (2025) received Royal Assent in December 2025 and sees significant reforms which aim to accelerate the delivery of housing and major infrastructure within England and Wales. A series of measures aim to accelerate approvals, unlock sites, and ensure housing growth is supported by utilities and environmental enhancements, helping meet the government’s target of 1.5 million new homes.

#### Local Housing Need

The **Draft Greater Cambridge Local Plan (Regulation 18)** identifies a requirement for **52,000 homes by 2041**, reflecting updated evidence of housing need (Greater Cambridge Shared Planning, 2025). This figure significantly exceeds previous targets and underscores the urgency of delivering new housing.

Affordability pressures compound this challenge:

- Entry-level<sup>1</sup> house prices in Cambridge have risen by **171% over 20 years**, reaching **£370,000**, while South Cambridgeshire averages **£326,500**.
- These prices equate to **11.7 times local earnings**, compared with a national ratio of **6.8**.
- Rental costs have surged, with average rents now around **£1,783 per month**.

**Table 2.1: Housing Need and Affordability Indicators**

Indicator	Cambridge	South Cambridgeshire	National Average
Entry Level House price (£)	370,000	326,500	190,000
Entry Level House Price-to-earnings ratio	11.7	10.3	6.8

<sup>1</sup> “Entry-Level” in this context refers to the lower quartile of housing prices.

<b>Monthly rent (£)</b>	1,783	1,384	1,422
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Source: ONS Lower quartile house prices for administrative geographies, 2023; ONS House price to residence-based earnings ratio, 2024; ONS Price Index of Private Rents, 2025

There are a number of local trends which support the case for housing at Station Fields:

- At a local level, the **population for the Local Impact Area (LIA)<sup>2</sup> has been growing at a faster rate** (7%) than the national average (4%) over the last five years. This supports the case for additional housing locally in order to meet the additional demand. The population is projected to keep increasing at a faster rate than nationally (14% compared to 9%), keeping the demand steady for the next ten years.
- The **population within the LIA is forecast to age** at a faster rate in line with national averages, with a growing proportion of people aged 65 and over. This could make it harder for Cambridge to access the readily available workforce it needs in the absence of sufficient housing to attract a younger population.
- In Cambridge (where CBC is located) the economic activity rate and employment rate is high, however there is a tight labour market, due to the fact that levels of **unemployment are low**. The rate for the LIA is 1.7%, compared to 4% nationally. This makes it **difficult for businesses to access the labour force they need**.
- Commuting flows shows the strong relationship between the two local authorities within the LIA, with large numbers commuting from South Cambridgeshire to Cambridge to work. In 2021, over 14,000 people commuted to Cambridge to work from South Cambridgeshire compared to only 5,000 commuting the other way. This highlights the **important role of South Cambridgeshire in meeting the workforce needs of Cambridge**, supporting the case for additional housing in this area.
- Whilst **deprivation levels are low** across the LIA as a whole, it is clear that the main deprivation challenge is around barriers to housing and services, especially in South Cambridgeshire. This is most likely due to its rural geography.

Station Fields offers a solution by providing up to **2,000 homes**, including **40% affordable housing**, thereby addressing acute affordability issues and supporting inclusive growth.

## Policy support for Housing close to Rail Stations

National planning policy increasingly prioritises development in locations that maximise sustainable transport options. The draft **National Planning Policy Framework (NPPF)** consultation document (December 2025) introduces a permanent presumption in favour of **suitably located development**, with a specific emphasis on **sites near rail stations**. The proposals include:

- A “default yes” for housing around stations within existing settlements and around well-connected stations outside settlements, even where this involves Green Belt land.
- Well-connected stations are those which are located in the top 60 Travel to Work Areas by Gross Value Added (GVA). They also need to have a service frequency (in the normal weekday timetable) of four trains per hour overall, or two trains per hour in any one direction.
- Minimum density requirements of 40 dwellings per hectare around all stations and 50 dwellings per hectare around well-connected stations, to optimise land use and support sustainable growth.
- Recognition that developments near rail stations reduce car dependency, improve access to jobs and services, and contribute to climate objectives.

<sup>2</sup> Defined as the Cambridge and South Cambridgeshire local authorities combined

This policy direction reflects the Government's commitment to integrating housing and transport planning to deliver sustainable communities. It also aligns with wider objectives in the **Planning and Infrastructure Act (2025)**, which seeks to accelerate housing delivery in locations that can leverage existing transport infrastructure.

Station Fields meets the criteria above for a presumption in favour of housing close to rail stations. Foxton is located in the Cambridge Travel to Work Area (TTWA). The latest GVA data confirms this area has the 13th largest GVA output compared to other TTWA areas nationally. There are also four trains per hour from Foxton at peak times. Finally, Station Fields will deliver a minimum of 40 dwellings per hectare to reflect its location close to the station. The site therefore meets the criteria to achieve a 'default yes' for residential development next to a station.

## Policy support for Economic Growth

National, regional, and local policy frameworks consistently emphasise the need to drive economic growth through strategic investment in housing, infrastructure, and employment. The UK Government's **Modern Industrial Strategy (2025)** sets out a 10-year plan to deliver certainty and stability for high-growth sectors, including life sciences (see below). This strategy positions the **Oxford-Cambridge Growth Corridor** as a priority cluster for innovation and investment, recognising the region's role in driving national productivity.

The **Case for Cambridge (2024)** reinforces this ambition, describing Cambridge as a critical engine for the UK economy and warning that housing and infrastructure constraints risk undermining future growth. It calls for significant new housing provision and transport improvements to unlock the potential of major employment sites such as the Cambridge Biomedical Campus (CBC).

Regional policy echoes these priorities. The **Cambridgeshire and Peterborough Local Growth Plan (2025)** aims to make the region the fastest-growing economy in the UK by 2050, with life sciences identified as a key sector. The plan highlights the importance of **aligning housing delivery with economic growth objectives, ensuring that skilled labour can access employment opportunities efficiently**.

Within the plan, there is a focus on four region-wide opportunity zones which aim to spread growth and investment. One of these is Global City Cambridge, which aims to strengthen the area's science and tech cluster and unblock key infrastructure gaps. Regional housing pressures are repeatedly raised through the Local Growth Plan and the plan recognises the need to **create both the housing and commercial space required to support growth in the region**. **Enhancing infrastructure** is recognised as a key priority and new developments such as Station Fields could have an important role to play in supporting the area's significant ambitions for growth.

Locally, the **Draft Greater Cambridge Local Plan** seeks to balance homes and jobs, supporting sustainable growth and reducing barriers to labour mobility. It recognises that developments near transport hubs and strategic employment sites will play a vital role in achieving these goals.

Section 5 of this report highlights the concerns over economic growth nationally. It highlights the UK's fragile economy, with significant levels of uncertainty over future growth, and some reporting that the UK is at risk of a recession. Cambridge has experienced a 9% increase in employment growth since 2019, which is well above national levels (5%). In order to continue to deliver strong levels of economic growth, there is a need to ensure that there is sufficient housing serving Cambridge so that it does not act as a constraint, which prevents the city from realising its true potential.

## National support for Life Sciences

The Government's **Modern Industrial Strategy (2025)** highlights life sciences as one of eight growth-driving sectors critical to national prosperity (the sectors are often referred to as IS-8). The UK Government's **Life Sciences Sector Plan (2025)** sets a clear ambition: to position the UK as the leading life sciences economy in Europe and the third globally by 2030. To achieve this ambition, the sector plan acknowledges that the UK will need to be at the forefront of global innovation, including through groundbreaking discoveries, scaling companies and a thriving ecosystem. The plan identifies the **Oxford-Cambridge Growth Corridor** as a priority cluster for life sciences, emphasising the need for developments that can accommodate a skilled workforce and enable collaboration within the sector.

## The importance of Cambridge and the case for the Cambridge Biomedical Campus

The **Case for Cambridge** (March 2024) sets out the UK Government's ambition to position Cambridge as a **world-leading centre for science, research, and innovation**, underpinning national economic growth. It highlights Cambridge's exceptional productivity and global reputation in life sciences, technology, and advanced research, describing the city as critical to the UK's aspiration to become a "science superpower". The document emphasises that Cambridge's success depends on delivering sustainable, infrastructure-led growth that balances homes, jobs, and environmental constraints.

The document specifically refers to the **Cambridge Biomedical Campus (CBC)** as a flagship employment site within the life sciences cluster. It notes CBC's global importance for healthcare innovation and research, while warning that housing and infrastructure constraints risk limiting its ability to expand and attract talent.

A central theme is the urgent need to address **housing shortages**, which the Government warns are **jeopardising future growth**. Despite strong economic performance, housing delivery has not kept pace with job creation, resulting in severe affordability pressures. The report calls for significant new housing provision, alongside investment in water supply, transport, and social infrastructure.

The existing **South Cambridgeshire Local Plan** (2018) recognises the Cambridge Biomedical Campus (CBC) as an international centre of excellence for patient care, medical research and healthcare education. **Policy E/2** confirms that an extension to the Cambridge Biomedical Campus will be supported.

**Policy S/CBC** of the **Draft Greater Cambridge Local Plan** states that the **Cambridge Biomedical Campus** (including Addenbrooke's Hospital) is a **nationally important site**. It:

- Recognises the campus and its expansion area (through Green Belt release) as appropriate for healthcare, research, education, and related development.
- Emphasises the need for a coordinated masterplan to support national health services and life-sciences research.

The Cambridge Biomedical Campus Supplementary Planning Document (SPD) which was adopted in **April 2025** underscores CBC's role as an **international centre of excellence** for patient care, biomedical research and healthcare education. The SPD confirms the need for continued expansion to maintain its role as a world-class hub for healthcare, biomedical research, and education. Future phases should deliver supporting infrastructure, public realm improvements, and enhanced pedestrian and cycle links. Overall, the document positions CBC's expansion as **essential for meeting national and regional health and life science's needs**, with growth tied to high-quality design and integrated planning.

Our own analysis confirms that the health sector (31,000 jobs) and the professional, scientific & technical sectors (43,000) which align with CBC's strengths are two of the largest sectors in the LIA. The area has

relative strengths in these sectors compared to nationally, and these sectors have been growing (particularly the health sector which supported 6,000 more employees over the last 5 years). In terms of sub-sectors, life sciences (5,000 jobs) and research & health (3,000 jobs) are significant.

The occupational and skills profile in the LIA and South Cambridgeshire is aligned with the skills requirements of CBC, which employs highly qualified people in professional occupations. The proportion of people working in professional, managerial or technical occupations in the LIA (49.5%) is well above the national average of 27.2%. Similarly, a far higher proportion are qualified to RFQ4 and above (64.6%) compared to national (46.8%) averages.

The next section sets out further information about the Cambridge Biomedical Campus (CBC) and makes the case as to how Station Fields can support this.

### 3 The Cambridge Biomedical Campus (CBC)

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The Cambridge Biomedical Campus (CBC) is a nationally and internationally significant centre for healthcare, life sciences, and research. Its continued growth is critical to the UK's ambition to become a global leader in science and innovation. This section provides a comprehensive overview of CBC, explains its strategic importance with reference to policy, and sets out how its planned expansion will create an urgent need for housing, an issue that Station Fields is uniquely positioned to address.

#### The Cambridge Biomedical Campus (CBC)

The Cambridge Biomedical Campus is located on the southern fringe of Cambridge, adjacent to Addenbrooke's Hospital. It is the largest employment site in Cambridge and one of Europe's leading centres for healthcare, education, and life sciences research. The Campus integrates world-class biomedical research, patient care, and academic institutions, creating a globally significant cluster.



Source: Getty Images

CBC hosts a unique mix of organisations, including the following:

- **Healthcare providers:** Cambridge University Hospitals NHS Foundation Trust (Addenbrooke's and Rosie Hospitals) and the Royal Papworth Hospital NHS Foundation Trust.
- **Education and research facilities:** University of Cambridge and the Medical Research Council Laboratory of Molecular Biology.
- **Commercial life sciences companies:** including AstraZeneca and Abcam.

Currently, CBC employs approximately **22,000 people**, with the majority (71%) working in the health sector as illustrated below. It is a hub for clinical roles, scientific and technical staff, and administrative support, attracting talent from across the UK and internationally.

**Table 3.1: Current Workforce Profile**

Sector	Share of Workforce	Approximate No	Median Income
Health	71%	15,029	£31,000
Education & Research	16%	3,402	£39,000
Commercial Life Sciences	13%	2,796	£65,000

Source: Cambridge Biomedical Campus Housing Study, Lichfields (April 2024), p.28.

According to recent research, the CBC workforce comprises of people predominantly **aged between 26 and 50 years**. This is likely to suggest the need for housing suitable for young professionals and families. The fact that healthcare roles account for the highest proportion of the workforce suggests that a large portion of the workforce often work **shift patterns**. This proximity to CBC is critical for recruitment and retention.

Most workers at CBC live within or around Cambridge itself, but the CBC travel to work area extends around 30km from the Campus, with 80% of the workforce drawn from this area that also covers Newmarket, Haverhill, Royston, Huntingdon and Ely

### The importance of CBC

As outlined in Section 2, CBC’s strategic importance is recognised at every level of policy. It is central to the UK Government’s ambition to position Cambridge as a “science superpower” and to lead globally in life sciences. The **Case for Cambridge (2024)** describes CBC as a flagship employment site within the life sciences cluster, recognising that housing and infrastructure constraints risk limiting its ability to expand and attract talent.

National strategies reinforce this position:

- The **Modern Industrial Strategy (2025)** identifies life sciences as one of eight growth-driving sectors critical to national prosperity.
- The **Life Sciences Sector Plan (2025)** sets a clear ambition for the UK to be the leading life sciences economy in Europe by 2030, with the Oxford-Cambridge Growth Corridor highlighted as a priority cluster.

Regionally, the **Cambridgeshire and Peterborough Local Growth Plan (2025)** emphasises the need for housing and infrastructure to support economic growth in life sciences and related sectors. Locally, the existing **South Cambridgeshire Local Plan (2018)** confirms the significance of the Cambridge Biomedical Campus and allocates land for its expansion (Policy E/2). This is followed through into the **Draft Greater Cambridge Local Plan** which recognises CBC as a nationally important site and also allocates land for its expansion (Policy S/CBC).

### CBC’s Expansion Plans

The Cambridge Biomedical Campus (CBC) has ambitious plans to grow over the next 20–25 years. By 2050, CBC’s workforce is projected to increase from **22,000 to 40,000 employees**, an uplift of **18,000 jobs**<sup>3</sup>. Two-thirds of this growth will be in the commercial life sciences sector, with the remainder in healthcare and research. A breakdown of jobs growth by broad sector is summarised below.

<sup>3</sup> CBC Housing Study, Lichfields (2024)

**Table 3.2: CBC Workforce Growth Projections**

Sector	Current Jobs	Future Jobs (2050)	Increase
Health	15,000	20,000	+5,000
Education & Research	3,400	4,400	+1,000
Commercial Life Sciences	2,800	14,800	+12,000
<b>Total</b>	<b>22,000</b>	<b>40,000</b>	<b>+18,000</b>

Source: CBC Housing Study, Lichfields (2024)

Future plans include:

- **New healthcare facilities:** including the Cambridge Children’s Hospital and Cancer Research Hospital, with pre-construction work already underway.
- **Commercial expansion:** AstraZeneca has previously announced its intent to invest £650 million to expand laboratory and office space. Whilst this is currently paused, ensuring that there are sufficient homes to support a skilled workforce will be important to make this happen.
- **Research growth:** Additional facilities for translational medicine and biotech innovation are also proposed.

### Why Housing is Critical to Support Growth

CBC’s ability to realise its growth plans is contingent upon the availability of suitable housing. The Greater Cambridge area faces severe affordability pressures as outlined in the previous section. As a result, the CBC Housing Study (2024) identifies a need for 14,000–16,000 affordable homes by 2050, alongside additional market housing.

CBC themselves make the case that without significant new housing provision, the Cambridge Biomedical Campus (CBC) will struggle to recruit and retain staff, particularly in key healthcare roles that require proximity to the Campus due to shift patterns.

### How can Station Fields help?

CBC is a nationally significant employment site and important in delivering the UK’s life sciences strategy. Its planned expansion will create thousands of high-value jobs, but this growth is at risk without substantial new housing provision. Station Fields is uniquely positioned to meet this need, offering a deliverable, well-connected site that aligns with national, regional, and local policy priorities. By providing housing at scale within proximity to CBC, Station Fields will enable the Campus to realise its growth ambitions and maintain its global competitiveness.

Station Fields has the potential to deliver **2,000 homes** in total and **800 affordable homes**. This would help to contribute to the housing need identified by the Cambridge Biomedical Campus. The site is located only 8km from CBC and is adjacent to an existing train station. The train journey from Foxton to Cambridge South (adjacent to CBC) will take only 7 minutes which means this site is well placed to deliver the workforce which CBC needs.

The Current proposed housing mix for Station Fields is summarised below. This shows that the site will meet CBCs ‘basic asks’ as summarised in the CBC housing document. This includes the following:

- At least 30% of new homes as affordable tenures for rent (Social/Affordable Rent). *According to the proposed schedule, this would be realised with 27% affordable rent and 3% social rent.*
- At least 13% and up to 20% of new homes as intermediate housing tenures provided as a suitable mix such as First Homes, shared ownership or rent-to-buy tenures.

- A mix of affordable homes by size (1-bed to 4-bed) and type (flats and houses) to reflect needs. Station Fields would provide a mix of 1-4+ bedroom houses and flats as per the schedule below.
- An allocations mechanism for some housing to go towards local workers in hard to recruit to sectors, and/or other specified workers at the Campus (e.g. Local Lettings Plans).

**Table 3.3: CBC Workforce Growth Projections**

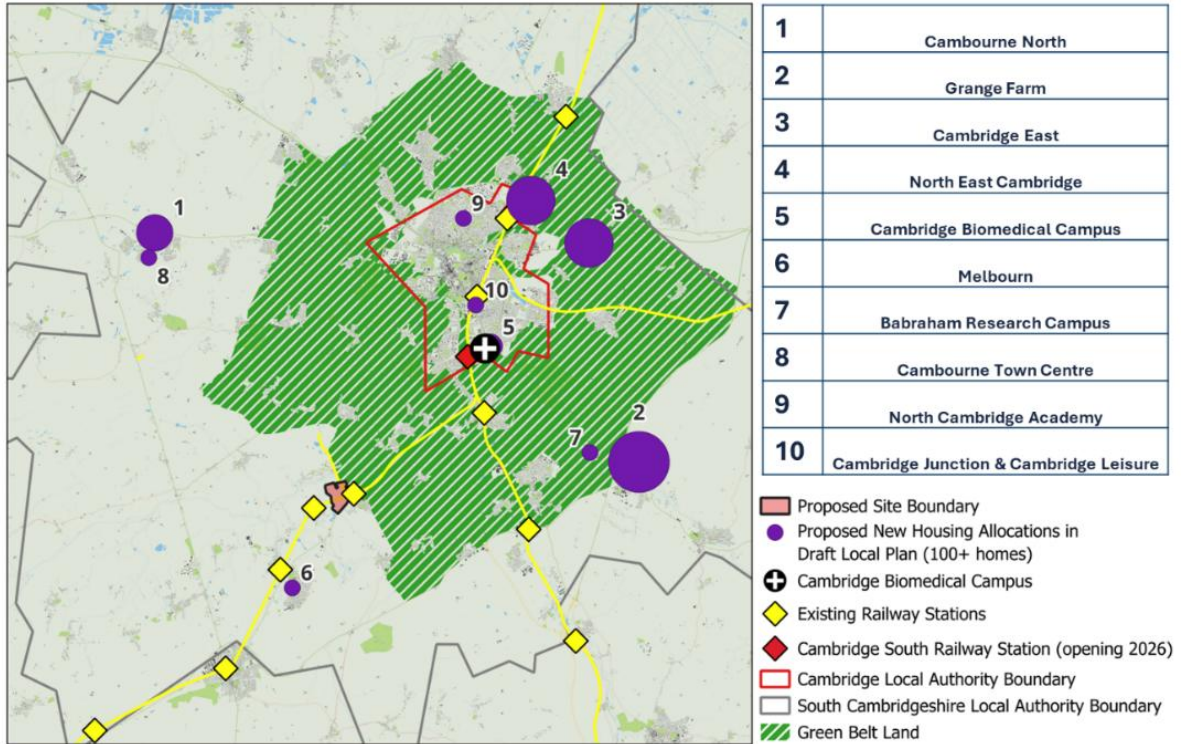
	Market		Social Rent		Affordable Rent		Shared Rent		Total	
<b>1 bed</b>	5%	60	30%	18	30%	162	20%	40	14%	280
<b>2 bed</b>	25%	300	40%	24	40%	216	40%	80	31%	620
<b>3 bed</b>	40%	480	25%	15	25%	135	30%	60	35%	690
<b>4+ bed</b>	30%	360	5%	3	5%	27	10%	20	21%	410
<b>Totals</b>	100%	1,200	100%	60	100%	540	100%	200	100%	2,000

As a result of the scheme, Station Fields has the potential to increase labour supply locally to specifically meet the needs of CBC. Section 5 of this report quantifies the impact which the scheme might have on labour supply, demonstrating that the occupational and skills profile of those living at Station Fields would align with CBCs requirements. This would result in a significant positive impact.

## 4 Comparative Advantage over Alternative sites

The draft Greater Cambridgeshire Local Plan sets out a list of new site allocations to meet updated housing targets. **Figure 4.1** illustrates the location of all proposed new housing sites which have the potential to deliver over 100 homes in the local plan period.

**Figure 4.1 New Housing Allocations in Draft Local Plan (100+ homes)**



Following a comparison of the sites (see Appendix 3), it is clear that Station Fields is far better placed to facilitate the growth of the Cambridge Biomedical Campus (CBC), thereby supporting economic growth. The key arguments in favour of this are summarised below.

### The site is likely to come forward earlier than other proposed allocations

The Station Field site is not subject to constraints that are likely to delay construction, with current timescales suggesting delivery of housing could happen earlier compared to other proposed allocations (see **Table A3.1**).

In comparison, whilst the North East Site (S/NEC) allocation is set to deliver 3,950 homes from 2032 onwards, it is reliant on the relocation of the Cambridge Waste Water Treatment Works. In August 2025, the Government announced that it will not be funding its relocation meaning that there is uncertainty as to whether the effective delivery of a significant proportion of the residential component of the Councils' vision for North East Cambridge will take place in the Local Plan period.

Other sites are reliant on transport projects to come forward. In the case of Cambridge East, the absence of a masterplan means that overall site capacity could be subject to transport infrastructure constraints.

## It is well supported by existing transport infrastructure

Station Fields is well supported by existing transport infrastructure and therefore not reliant on future infrastructure projects to come forward to ensure it has suitable connectivity by train into the Cambridge city centre and to key employment areas such as the CBC.

Station Fields is located in close proximity to Foxton Station, capitalising on the well serviced train route running out of the Southwest of Cambridge. Once South Cambridge Station opens this year, CBC will be accessed by rail in only 7 minutes. At present the proposed Melbourne site (S/RRA/CR), which could deliver just 120 homes, is the only allocation in the Draft Local Plan located near this stretch of railway and relevant stations.

In comparison, sites such as Cambridge East (S/CE), Grange Farm (S/GF), Cambourne North (S/CBN) and Eddington (S/NWC) are not well serviced by existing train routes, and instead reliant on local bus routes to travel into Cambridge.

Whilst there are plans for future infrastructure projects to come forward, which have the potential to improve accessibility, these are at an early stage and subject to uncertainty. The key projects are summarised below:

- **Cambridge Eastern Access Busway:** A proposal for more cycleways, bus lanes and better pavements along Newmarket Road. With proposals for a new travel hub just off Airport Way and a new busway through the current Cambridge Airport site. However, there is currently no agreed route, and funding has not been agreed.
- **CSET Busway:** a new public transport route connecting CBC to Great Shelford, Stapleford, Sawston, and a new travel hub near the A11/A1307, improving links to Babraham Research Campus and Granta Park. An application is currently being reviewed by DfT, and a public inquiry will take place in 2026. Full funding to support construction is not yet fully secured.
- **EWR Cambourne to Cambridge Link:** East West Rail will link Cambridge with Oxford, Milton Keynes, and Bedford. A new link is proposed covering Cambourne to Cambridge, and is included in the latest proposed rail route, however delivery is still dependent on DCO approval.
- **Cambourne to Cambridge Guided Busway (C2C):** is a proposed route linking Cambourne to CBC via Bourn Airfield and West Cambridge, enhancing connectivity for western settlements.

## It supports faster journey times to the CBC

As highlighted in earlier sections of this report, the Site is located adjacent to Foxton Station ensuring fast journey times into Cambridge and the CDC, which will be as short as 15 minutes once the South Cambridge rail station is operational (7 minutes by train).

Two of the other key Proposed Site Allocations also benefit from fast journey times to the CBC, including North East Cambridge (S/NEC) and Cambridge Biomedical Campus (S/CBC). However, these sites face delivery constraints. As stated above, North East Cambridge (S/NEC) is reliant on funding for the relocation of the onsite sewage works. Furthermore, the Cambridge Biomedical Campus (S/CBC) requires Greenbelt land to be released in order deliver all phases of construction (and has the potential to only deliver 1,000 dwellings).

## 5 Delivering significant economic benefits

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Station Fields has the potential to deliver significant social and economic benefits, benefiting the local and national economy. As demonstrated in the previous section, the site does not have the same delivery risks compared to other sites identified in the Draft Greater Cambridge Plan and is therefore capable of coming forward more quickly responding to a need for jobs and economic growth now.

### The need for economic growth

The **national and global economy remains fragile** and there is a need to support economic growth. The first half of the 2020s has been marked by successive global shocks, including the COVID-19 pandemic (2020–2023), an energy and cost-of-living crisis (2021), and rising interest rates (2022). This has resulted in the sharpest increases in energy and borrowing costs in decades. These factors, alongside demographic pressures and heightened defence spending, have contributed to persistent economic uncertainty.

In early 2025, new US trade tariffs further disrupted global markets, compounding challenges for UK businesses. The UK's change to a **Labour Government** (in July 2024) brought a renewed focus on growth. However, so far, the economy has experienced limited economic growth under the new government, against a backdrop of challenging economic circumstances both in the UK and globally.

The **Autumn Budget 2025** introduced welfare reforms and increased public spending, with the Office for Budget Responsibility forecasting that annual borrowing would need to rise by £16 billion as a result (2025–2029). Following on from the Budget, the **OBRs predictions on growth in the economy** were revised upwards in the short-term (with GDP growth forecast to rise to 1.5% for 2026–27), but medium-term prospects remain subdued, with real GDP in 2029 unchanged from previous forecasts.

Recent national data indicates that **unemployment** in the UK has risen to **5.1% for the period August–October 2025**, the **highest unemployment rate since early 2021** (excluding pandemic peaks)<sup>4</sup>. There are now approximately 1.83 million people unemployed, reflecting weakening hiring activity and a fall in payroll employment numbers.

**CPI inflation** was 3.8% in September, which is above the Monetary Policy Committee's 2% target. Business confidence also remains low with **economic uncertainty** cited by 33% of firms in an ONS survey in November 2025, the highest since early 2022<sup>5</sup>.

**The UK economy is showing clear signs of strain, with official data pointing to recession risks.** The Office for National Statistics (ONS) notes that GDP fell by 0.1% in both September and October 2025, following near-zero growth in Q3, leaving the economy “close to a technical recession” (defined as two consecutive quarters of contraction)<sup>6</sup>. The Bank of England has warned that growth is “stuck” and that the UK could tip into recession if weakness persists, highlighting zero growth expectations for Q4 2025<sup>7</sup>. While the Office for Budget Responsibility (OBR) does not declare a recession, its November 2025

<sup>4</sup> [Employment in the UK December 2025.pdf](#)

<sup>5</sup> [Business insights and impact on the UK economy - Office for National Statistics](#)

<sup>6</sup> [GDP monthly estimate, UK - Office for National Statistics](#)

<sup>7</sup> <https://www.bankofengland.co.uk/-/media/boe/files/monetary-policy-summary-and-minutes/2025/monetary-policy-summary-and-minutes-december-2025.pdf>

Economic and Fiscal Outlook projects subdued growth, well below historic norms<sup>8</sup>, reinforcing the downbeat outlook.

Given the significant levels of uncertainty in the economy with low levels of growth and a subdued outlook, there is clearly a need to support economic growth. Station Fields has the potential to deliver economic benefits in the short-term, creating new jobs and delivering economic output, which is needed now. The new housing has the potential to support the growth of the Cambridge Biomedical Campus (CBC) by providing much-needed labour supply to catalyse the growth of the life sciences sector around Cambridge which is a national priority.

## The impact of Station Fields

### Construction Impacts

The investment required to redevelop Station Fields for the proposed uses will create demand for construction workers during the build period. It is estimated that the proposed redevelopment would generate demand for around **153 FTE** temporary construction workers per annum over a 15-year build period. These jobs will be a mixture of on-site and supply chain roles. The figure is an average and could be higher at peak periods of construction activity.

The large supply chain associated with the redevelopment of the building can result in substantial indirect and induced impacts. According to work by Professor Ball (Lichfields, 2018)<sup>9</sup> one direct job in the construction sector supports 0.5 indirect jobs in the supply chain. Applying a multiplier of 1.5 implies that the development supports an additional 76 indirect jobs per annum. This brings the total number of direct, indirect and induced jobs to **229 FTEs** per annum.

The cumulative economic output associated with construction activity is estimated at **£240 million in Gross Value Added (GVA)** (Net Present Value). This reflects direct and indirect jobs over the 15-year period.

It is expected that a proportion of the jobs supported during the construction phase will be accessible to residents of South Cambridgeshire and Cambridgeshire more widely. In addition, there are likely to be opportunities to support continuing and new apprenticeships, work placements and training.

### Operational Impacts

#### *Contribution to Housing and Affordable Housing Need*

Station Fields will make a significant contribution to local housing supply, delivering up to **2,000 new homes**. This is equivalent to 4% of the Greater Cambridge Local Plan's total requirement (48,195 homes, 2024–2045). The development will meet the local affordable housing target, providing **800 affordable homes** (40% of total units).

The delivery of new housing will deliver a number of benefits for the local area including helping to attract and retain a working age population, supporting young families and first-time buyers, adding to the diversity of housing stock available in the local area and reducing the council's housing waiting list.

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<sup>8</sup> [Economic and fiscal outlook – November 2025 - Office for Budget Responsibility](#)

<sup>9</sup> The Economic Footprint of House Building in England and Wales, Lichfields, 2018

### Demographic and Labour Supply Impacts

In order to estimate the demographic and labour supply impacts of the proposals, we have drawn upon case study information for a similar scheme known as **Trumpington Meadows**. Based on this, the potential demographic and labour supply impacts for Station Fields are summarised in **Table 5.1**.

Station Fields would house over 5,000 additional residents. The new development would boost labour supply by 2,700 people, an increase of 3.2% for South Cambridgeshire. Significant numbers of people would be highly qualified, around 3,200 people (65%), and in the region of 2,100 people (43%) would be working in professional occupations. As a result, many are likely to have the skills and occupational profile relevant to the Cambridge Biomedical Campus (CBC), helping to support its future growth.

**Table 5.1 Potential demographic and labour supply impacts of proposals**

	2,000 homes
Increase in resident population	5,013
% increase in current population for South Cambridgeshire	2.9%
Increase in working age population (16-64 years)	3,258
Residents which are economically active	2,728
% change in economically active residents (South Cambridgeshire)	3.2%
Increase in residents qualified to Level 4+	3,258
Increase in residents working in professional occupations	2,156

Source: GC Insight, drawing upon national statistics. Figures all rounded

### Household Expenditure

The cumulative household expenditure generated by new residents over the 15-year period is projected to be **£123.7 million (NPV)**. This expenditure will support approximately **159 FTE jobs** once the site is fully operational. Around 31 of these are anticipated to be located within South Cambridgeshire. Additional household expenditure in the area will help to boost the sustainability and vitality of local services, town centres and amenities.

### Employment

The masterplan for Station Fields includes **5,000 sq m of employment and community space**, supporting an estimated **195 direct FTE jobs** as illustrated in the table below.

The commercial provision will include space for small businesses, including flexible workspace. The community space will meet local needs (e.g. a health centre) and will be determined at a later stage.

**Table 5.2 Employment Impacts by Use Class**

Use Class	Floorspace (sqm)	Direct FTEs
Retail	1,250	64
Community	1,250	16
Office	1,250	92
Light industrial	1,250	23
<b>Total</b>	<b>5,000</b>	<b>195</b>

Source: floorspace areas provided by the client. Calculations made by GCI using standard employment densities

A recent report<sup>10</sup>, found that the median annual income of employees at CBC was £36,000, similar to Cambridge (£35,000) and South Cambridgeshire (£37,000) as a whole. Whilst this figure varied across sectors, it provides an estimated figure for potential employee salaries that could be supported onsite. This suggests that the site has the potential to support salaries of over **£7 million** annually once fully operational.

Indirect and induced (supply chain and employee spend) impacts are expected to generate a further **97 FTEs**, resulting in a total of **292 FTE jobs** supported by the scheme. The median annual income for employees is estimated at **£36,000**, with total salaries exceeding **£7 million** per annum. The operational phase is projected to deliver **£97 million (NPV)** in GVA over the construction period.

### ***Agglomeration and Productivity Effects***

The role of housing in supporting agglomeration and productivity effects is widely recognised at all policy levels. Locations with a larger labour pool within shorter commutes makes them a more attractive investment proposition for companies seeking diverse talent, enabling better skills matching, improved retention and stronger prospects for growth with a shared pool of resources. However, the circumstances that are most likely to lead to these impacts and the strength of the relationship between housing and agglomeration effects varies.

Recent research for Homes England<sup>11</sup> specifically referred to Cambridge and found that the unavailability of housing is a key push factor for some businesses deciding whether to locate or stay in the area. It found that a 5% increase in housing stock would be associated with a 10% reduction in house prices and a 3.1% increase in productivity.

Within the research, stakeholders cited key 'pull factors' to Cambridge as being its pool of skilled workers amongst other things. By providing a substantial supply of housing, including affordable housing, in close proximity to CBC, Station Fields will facilitate labour mobility and pooling (enabling more productive job-worker matches) at a faster rate, and in turn support continued agglomeration and productivity growth. As set out above, the Proposed Development will increase the labour supply in proximity to CBC by around 2,728 persons (based on benchmark economic activity rates). This is a substantial potential pool of labour within seven minutes commute distance of CBC as well as central Cambridge which will contribute to the areas attractiveness to like-minded companies potentially seeking to locate at CBC.

### ***Fiscal Benefits***

The scheme is estimated to generate **£17.3 million (NPV)** in Council Tax revenue over 15 years, representing an approximate 2% increase in South Cambridgeshire's annual income. Business rates revenue is projected at **£1.0 million (NPV)** over the delivery period. These fiscal benefits would make a significant contribution towards the delivery of services locally.

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<sup>10</sup> [CBC-Housing-Study-Report-Final-May24.pdf](#)

<sup>11</sup> Homes England, July 2025, Housing Affordability and Productivity

## 6 Wider Benefits

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As well as the quantifiable benefits identified in the earlier section, Station Fields has the potential to contribute to a number of wider benefits. Whilst not easily quantifiable they remain highly important and of significance to both the local and national economy. This section brings together information from the remainder of the report to collectively highlight these wider benefits. In summary Station Fields will provide:

- A catalyst for the growth of the Cambridge Biomedical
- A well-connected location close to the railway station
- The potential to deliver sustainability, health and well-being benefits
- The potential to support new infrastructure, including a bridge bypass for Foxton
- New business space, supporting SMEs
- New community infrastructure to foster social cohesion
- Delivering accessible open space

### **A catalyst for the growth of the Cambridge Biomedical Campus (CBC)**

Station Fields is a strategic enabler for the continued expansion of the Cambridge Biomedical Campus (CBC), one of Europe's largest life sciences clusters and a critical driver of the UK's innovation economy. The CBC Housing Study (May 2024) identifies a shortfall of over 3,000 homes required to support projected workforce growth, with a particular emphasis on housing for key workers in life sciences and healthcare. Station Fields directly addresses this need by delivering up to 2,000 homes, including 40% affordable housing, alongside employment and community spaces.

The provision of new homes will enhance labour mobility and help resolve skills shortages, ensuring CBC remains globally competitive and resilient to economic uncertainty. The development aligns with national and local policy objectives for housing delivery and economic growth, supporting the life sciences sector's expansion.

### **A well-connected location close to the railway station**

Station Fields is located adjacent to Foxton railway station, with it being approximately a 5-minute walk from the middle of the proposed Site boundary to the station. This station is serviced by trains into Cambridge's town centre, and further afield to London Kings Cross. The new Cambridge South railway station, which will be located on the CBC site, is planned to open in June 2026. Once open, services between Foxton and Cambridge South will take approximately 7 minutes. As mentioned elsewhere in the report there is a strong policy emphasis in favour of locating new residential development close to railway stations.

There is also a dedicated cycle route linking Station Fields to CBC along the A10 cycle path. This will enable sustainable commuting and reduce reliance on private vehicles. Integrated pedestrian and cycle networks will be provided, ensuring seamless connections to local services and green spaces.

Regarding local services and amenities, Foxton Village is serviced by a small convenience store and offers residents amenities such as the village hall and outdoor play area for younger residents. This offer could be expanded by the delivery of onsite space for retail and community uses as part of a Station Fields development.

Compared to housing sites proposed in the Draft Local Plan, Station Fields offers unrivalled integration with rail infrastructure and sustainable transport options, making it the most strategically located option for growth.

### **Delivering sustainability, health and wellbeing benefits**

Station Fields promotes a modal shift towards public transport and cycling, reducing congestion and carbon emissions associated with car-based commuting. The ability to cycle to CBC and other employment centres supports physical activity and wellbeing, aligning with national and local health objectives.

An uplift in active travel can generate economic benefits which relate to the knock-on effects of improved health (lower health care costs and a healthier and happier population). Research on the value of a person partaking in physical activity suggests that the overall wellbeing value of an individual being fairly active (30 – 149 minutes of exercise per week) is around £1,200 and active (150+ minutes of exercise per week) as around £2,600<sup>12</sup>. If, for example, 20 residents at Station Fields (1%) increased their physical activity levels as a result of moving to a Site in such close proximity to active travel routes, this could generate social value impacts as high as **£26,000 (2025/26 prices) per year**<sup>13</sup>. It must be noted that this is an example, and at this point the number of people who may increase their activity levels as a result of the Proposed Development is unknown.

The development will deliver green corridors, integrated open spaces, and active travel infrastructure, creating a healthy and sustainable living environment. These features will encourage active lifestyles and provide access to nature, supporting mental and physical health.

### **Delivering new infrastructure, including a Bridge Bypass for Foxton**

The development will deliver critical infrastructure, including the Foxton Bridge Bypass. A bridge bypass for Foxton has been campaigned for and talked about for many years, but has been deemed difficult and costly to deliver. The level crossing presents a barrier to vehicle movements including emergency vehicles. It can create delays of up to 15 mins in peak times.

The bypass will alleviate congestion and improve safety for all road users. This investment enhances the resilience of the local transport network and supports wider growth objectives for South Cambridgeshire. The bypass will also improve connectivity for freight and logistics, reducing delays and supporting economic activity.

### **Delivering new business space and supporting SMEs**

The scheme includes new business space alongside flexible workspace designed to accommodate SMEs and start-ups. This will help to foster innovation and complement the residential offer. The inclusion of business space will attract a wide range of sectors, including retail, financial and professional services firms. It will allow people living at Station Fields to work closer to home, supporting sustainability objectives. Research has suggested that there has been a rising demand for more flexible workspace following on from the pandemic<sup>14</sup>. New employment provision will create local jobs and strengthen the economic base, ensuring Station Fields contributes to both housing and employment growth. A mix of uses, including employment and services will help to create a better sense of place for people living

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<sup>12</sup> [The social value of sport and physical activity in England - year two update](#)

<sup>13</sup> This assumes half move from being physically inactive to fairly active, and the other half move from being fairly active to active

<sup>14</sup> [What's Next for Flex: Rising Demand Supports Viability of Flexible Office Industry | CBRE](#)

locally, making the development more attractive to people wishing to relocate. These services would also be accessible to people living in neighbouring villages.

### **Potential to deliver new Community Infrastructure to foster social cohesion**

The CBC Housing Study sets out its placemaking asks which are based on a survey of its workers. One of these is that development and growth should be **close to, or provide, amenities** (e.g. shops, healthcare, schools, parks) to make sustainable communities and places.

Station Fields has the potential to deliver new social and community infrastructure (SCI). This will ensure that the development becomes a vibrant and inclusive community. Whilst proposals for new community infrastructure have not yet been finalised, any new provision will respond to locally identified needs, creating a sense of place and fostering social cohesion.

### **Delivering accessible open space**

It is envisaged that around x ha of the development at Station Fields could be public open space. It is estimated that in the region of 53% would comprise of open space, including play space. In addition, 47% would comprise of a Countryside Park, which would be accessible to both residents and the general public. This would bring back to life land which was previously inaccessible. The development would also comprise of allotments and managed green spaces.

## 7 Conclusions

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The evidence presented in this report demonstrates a compelling and urgent case for bringing forward the Station Fields development. The site is uniquely positioned to help address the critical housing, labour supply, and infrastructure challenges facing Greater Cambridge. The key points made in this report are summarised below.

### **A Deliverable and Strategic Response to Housing Need**

Greater Cambridge faces a severe and persistent housing shortage, driven by strong population growth, escalating affordability pressures, and rapidly rising demand linked to the area's high-performing knowledge economy. House prices and rents continue to outpace earnings, constraining recruitment, dampening productivity, and hindering economic inclusion. Station Fields provides a highly deliverable opportunity to make a meaningful contribution to the region's future housing needs, with capacity for 2,000 homes, 40% of which will be affordable.

The scheme can begin delivery within the next five years and is not constrained by dependencies on major infrastructure projects. In contrast, several of the draft Local Plan's proposed allocations face major risks to delivery, including reliance on unfunded transport schemes or the relocation of strategic infrastructure. Station Fields therefore provides an immediate and reliable mechanism for boosting housing supply, accelerating delivery, and addressing the acute affordability pressures felt across South Cambridgeshire and Cambridge.

### **Enabling the Growth of the Cambridge Biomedical Campus**

The Cambridge Biomedical Campus (CBC) is one of Europe's most significant life sciences clusters and a nationally important strategic asset. CBC's strategic importance is recognised at every level of policy. It is central to the UK Government's ambition to position Cambridge as a "science superpower" and to lead globally in life sciences. The Case for Cambridge (2024) describes CBC as a flagship employment site within the life sciences cluster, recognising that housing and infrastructure constraints risk limiting its ability to expand and attract talent.

CBC's planned expansion, which will see employment rise from 22,000 jobs to 40,000 by 2050, will require a substantial increase in local housing to sustain the skilled workforce essential to its global competitiveness.

Station Fields is one of the very few locations capable of meeting this need in a timely and sustainable way. Its proximity to Foxton Station, combined with the direct rail connection to the new Cambridge South Station (7 minutes by train), makes it exceptionally well connected to the Campus. The development could deliver 2,000 homes to help CBC overcome its greatest barrier to growth, a lack of housing including accessible, affordable homes for key workers, researchers, clinicians and specialist staff.

The occupational and skills profile of future residents at Station Fields aligns closely with CBC's workforce requirements, ensuring that the scheme does not simply add capacity but directly contributes to the talent pipeline that the life sciences sector depends upon.

Station Fields would house over 5,000 additional residents. The new development would boost labour supply by 2,700 people. Most residents would be highly qualified, around 3,200 people (65%), and in the region of 2,100 people (43%) would be working in professional occupations. As a result, many are likely to have the skills and occupational profile relevant to the Cambridge Biomedical Campus (CBC), helping to support its future growth.

## Significant Economic, Fiscal and Social Benefits

The proposed development offers substantial economic benefits. Over the build period, Station Fields will support around **229 FTEs** per annum, including direct, indirect and induced construction jobs. It will also generate **£240 million** in GVA over the 15-year construction period.

Once operational, the development will support over **290** direct and indirect jobs through the delivery of commercial and community floorspace. As a result, it could deliver **£97 million (NPV)** in GVA over a 15-year period.

The new homes could accommodate over **5,000** additional residents. They would be expected to generate household expenditure of **£123.7 million (NPV)** over a 15-year period. Some of this would benefit local shops and businesses close to the site (both new and existing). This spend would support a further **159** jobs.

Station Fields also has the potential to generate considerable fiscal benefits, including an estimated **£17.3 million (NPV)** in additional Council Tax revenue and **£1 million (NPV)** in business rates over 15 years. These resources will strengthen the financial capacity of South Cambridgeshire District Council to meet growing demand for services and infrastructure.

The provision of new homes will also result in significant agglomeration or productivity benefits. Recent research for Homes England<sup>15</sup> specifically referred to Cambridge and found that the unavailability of housing is a key push factor for some businesses deciding whether to locate or stay in the area. It found that a 5% increase in housing stock would be associated with a 10% reduction in house prices, and a 3.1% increase in productivity.

Station Fields would also generate a range of wider strategic benefits. The proposals include the delivery of new business space—incorporating flexible workspace to support SMEs—alongside new community facilities and a bridge bypass for Foxton. The development would provide high-quality, accessible green infrastructure, including a countryside park, play space and allotments. In addition, the scheme is designed to encourage a shift towards sustainable travel modes such as public transport and cycling, helping to reduce congestion and reliance on car-based commuting. These measures have the potential to deliver significant public health benefits.

Due to the poor state of the national economy, there is a need to support jobs and economic growth now. The national economy remains fragile, with unemployment rising to 5.1% in 2025, the highest rate since early 2021 (excluding pandemic peaks). CPI inflation was 3.8% in September above the Monetary Policy Committee's 2% target. Business confidence remains low with economic uncertainty cited by 33% of firms in an ONS survey in November 2025, the highest since early 2022<sup>16</sup>.

The UK economy is showing clear signs of strain, with official data pointing to recession risks. The Office for National Statistics (ONS) notes that GDP fell by 0.1% in both September and October 2025, following near-zero growth in Q3, leaving the economy “close to a technical recession” (defined as two consecutive quarters of contraction). The Bank of England has warned that growth is “stuck” and that the UK could tip into recession if weakness persists, highlighting zero growth expectations for Q4 2025. While the Office for Budget Responsibility (OBR) does not declare a recession, its November 2025 Economic and Fiscal Outlook projects subdued growth of around 1.5% per year, well below historic norms, reinforcing the downbeat outlook.

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<sup>15</sup> Homes England, July 2025, Housing Affordability and Productivity

<sup>16</sup> [Business insights and impact on the UK economy - Office for National Statistics](#)

Station Fields is capable of delivering the homes necessary to support the growth of the Cambridge Biomedical Campus sooner than any of the other proposed sites in the Draft Greater Cambridge Local Plan. In turn, it will be able to support economic growth and prosperity.

## A.1 Policy Review

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### Summary

National, regional, sub-regional and local policies support the case for the Station Fields development in a number of ways:

- The site is in close proximity to the rail network, with local policies highlighting the importance of new developments being close to public transport/active travel infrastructure. The new draft NPPF also has provisions which could favour developments around train stations.
- The site is near to the Cambridge Biomedical Campus which will need suitable housing infrastructure to attract and retain skilled talent to support the workforce – the site is referred to in the previous Cambridge Local Plan as a centre for strategic employment growth and is also identified in the new draft Greater Cambridge Local Plan as being of ‘national importance’.
- Policy S/CBC of the draft Local Plan states that the Cambridge Biomedical Campus (including Addenbrooke’s Hospital) is a nationally important site and it references the need for a coordinated masterplan to support national health services and life sciences research. The Cambridge Biomedical Campus Supplementary Planning Document (SPD confirms the need for continued expansion to maintain its role as a world-class hub for healthcare, biomedical research, and education, and recognises the importance of improved connectivity to the Campus.
- The region is referenced in national strategies such as the Modern Industrial Strategy as a key area of focus for future growth and investment across a number of sectors, including Life Sciences – this could raise demand for housing and the need for attractive, accessible housing sites.
- The ambition to position Cambridge as a world-leading centre for science, research and innovation is set out in the Case for Cambridge, and this emphasises Cambridge’s successes depends on delivering sustainable, infrastructure-led growth that balances homes, jobs and environmental constraints. Housing shortages are referenced as jeopardising future growth, while the need for housing and infrastructure to support sites such as the Cambridge Biomedical Campus is also specifically referenced.

### National

#### Modern Industrial Strategy

The UK Government’s new **Modern Industrial Strategy** (2025) sets out a 10-year plan that aims to deliver the certainty and stability needed to drive investment in high growth sectors and deliver the national growth mission. The strategy is central to the Government’s growth mission and gives particular focus to eight growth-driving sectors known as the IS-8 including Advanced Manufacturing, Creative Industries, Clean Energy Industries, Defence, Digital and Technologies, Financial Services, Life Sciences, and Professional and Business Services. For each of these sectors, the Government has set out priority clusters across the country – these sectors and specific areas are expected to be the focus of significant government support and funding aimed at driving growth.

**The Oxford to Cambridge Growth Corridor** is named as a priority cluster for multiple IS-8 sectors including Digital and Technologies, **Life Sciences**, and Defence, while the Cambridgeshire and Peterborough Combined Authority area is listed as a priority cluster area for Clean Energy Industries. This outcome of the cluster prioritisation process places significant focus on the Cambridgeshire region in which Station Fields is located and presents possibilities for a range of new opportunities. The focus on

the Life Sciences sector in particular as a priority cluster shows the Government's commitment and ambition for local growth in this sector. Future developments and sites such as the Cambridge Biomedical Campus (CBC) will need to be supported by infrastructure for local workers, with Station Fields offering an attractive proposition in this realm.

## Life Sciences Sector Plan

The UK's **Life Sciences Sector Plan** sets a clear ambition: for the UK to be the leading Life Sciences economy in Europe by 2030; and for the UK to be the third most important Life Sciences economy globally, behind the US and China only, by 2030. To achieve this ambition, the sector plan acknowledges that the UK will need to be at the forefront of global innovation, including through groundbreaking discoveries, scaling companies and a thriving ecosystem. The delivery of the plan will be measured across 4 targets: investment in commercial R&D, access to scale-up capital, patient access, and foreign direct investment. The plan offers specific investments to achieve its aims and principally drive inclusive, sustainable and resilient UK economic growth.

The Sector Plan identifies the **Oxford to Cambridge Growth Corridor** as being key to unlocking growth in the sector. The region is a leader in research and development, translational medicine and AI adoption for healthcare outcomes, and is anchored by world-leading academic expertise. To increase the competitiveness and growth of the sector, new investments will be needed to improve infrastructure and access to facilities, including in this region. Two new BioNTech research and development hubs have been announced, with the first one in Cambridge focused on genomics, oncology and structural biology. The plan implies that new investments into the Life Sciences sector in the Cambridgeshire region will need to be supported by infrastructure, and this could include accommodation for a skilled workforce. The Sector Plan also recognises the importance of infrastructure investments such as East-West Rail to successfully deliver on the sectors' growth ambitions.

## The Case for Cambridge

The **Case for Cambridge** (March 2024) sets out the UK Government's ambition to position Cambridge as a **world-leading centre for science, research, and innovation**, underpinning national economic growth. It highlights Cambridge's exceptional productivity and global reputation in life sciences, technology, and advanced research, describing the city as critical to the UK's aspiration to become a "science superpower". The document emphasises that Cambridge's success depends on delivering sustainable, infrastructure-led growth that balances homes, jobs, and environmental constraints.

A central theme is the urgent need to address **housing shortages**, which the Government warns are **jeopardising future growth**. Despite strong economic performance, housing delivery has not kept pace with job creation, resulting in severe affordability pressures. The report calls for significant new housing provision, alongside investment in water supply, transport, and social infrastructure. Key transport projects such as **Cambridge South Station** and East-West Rail are identified as essential to widening the labour catchment and supporting sustainable commuting.

The document specifically references the **Cambridge Biomedical Campus (CBC)** as a flagship employment site within the life sciences cluster. It notes CBC's global importance for healthcare innovation and research, while warning that housing and infrastructure constraints risk limiting its ability to expand and attract talent. The Government's vision for Cambridge supports the enablement of growth at CBC through improved connectivity and housing delivery, ensuring the Campus remains competitive on a global scale.

## National Planning Policy Framework (NPPF)

The UK Government has pledged changes to the planning system in order to support the delivery of its national growth priorities. In December 2024, the publication of the **National Planning Policy Framework (NPPF)** set out the government’s overarching planning policies for England which guides both plan-making and decision-making in local planning authorities. This includes mandatory housing targets, five-year land supply requirements, and a strong focus in favour of sustainable development.

More recently, the Ministry of Housing, Communities and Local Government has launched a **consultation on a revised National Planning Policy Framework** (December 2025). The proposed new framework would introduce a **permanent presumption in favour of suitably located development**, with preferential treatment also given to developments which support local economies. There are proposals for a **“default yes” – for suitable proposals that develop land around rail stations** within existing settlements, and around ‘well-connected’ train stations outside settlements, including on Green Belt land.

The draft NPPF also includes proposals for a minimum density of 40 dwellings per hectare around all stations and 50 dwellings per hectare around ‘well-connected’ stations – maximising opportunities for sustainable development, making the most of high levels of connectivity, and improving access to jobs and services. Well-connected stations will be those which are:

- Located within the top 60 Travel to Work Areas by Gross Value Added
- With a service frequency (in the normal weekday timetable) of four trains per hour overall, or two trains per hour in any one direction

On first point, Foxton is located in the Cambridge TTWA. The latest GVA data confirms this area has the 13th largest GVA output compared to other TTWA areas nationally. On the second point, there are four trains per hour at Foxton during peak times.

The consultation on the new framework is running until March 2026.

The new language in the framework which supports development around rail stations could increase the attractiveness of the Station Fields proposition given its own close proximity to the rail network.

## National Policy support for housing

The UK Government has set a clear ambition to build more new homes. Specifically, it has set out an ambition to build 1.5 million homes over the course of the current Parliament, which runs through to 2029. Building more homes is an important element of the current Government’s manifesto set out in the **Plan for Change (2024)**. It is a key driver for supporting the realisation of the Government’s number one mission of growing the economy. This ambition is set out in a range of documents and policies, some of which include:

- **Our Plan to Build Homes** (July 2024) – a policy paper which reintroduced mandatory housing targets for local councils and outlined the ambition to build 1.5 million homes over the course of the current Parliament.
- **Planning Reform Working Paper: Speeding Up Build Out** (May 2025) – this paper looks to address the persistent gap between permissioned and completed homes. It introduces a statutory reporting framework for residential developments of 50+ units and sets out potential powers and penalties that local authorities would be able to exercise to support development.
- **Homes England Strategic Plan 2025-2030** – this plan sets out the overall strategy and an investment roadmap for the government’s housing agency in order to align with the national ambition for housing development.

- **Planning and Infrastructure Act (2025)** – this legislation received Royal Assent in December 2025 and sees significant reforms which aim to accelerate the delivery of housing and major infrastructure within England and Wales. The Act will streamline planning processes, reduce delays from legal challenges, and empower local authorities to set planning fees and reinvest in faster decision-making. It introduces cross-boundary spatial strategies, strengthens land assembly powers through development corporations, and aligns housing delivery with critical infrastructure such as water supply and grid connections. These measures aim to accelerate approvals, unlock sites, and ensure housing growth is supported by utilities and environmental enhancements, helping meet the government’s target of 1.5 million new homes.
- **National Plan to End Homelessness (2025)** – this plan reiterates the 1.5 million homes target as a core component of the national strategy to tackling homelessness, while it provides significant investment in supported housing.

## Regional and Sub-Regional

### Get Cambridgeshire and Peterborough Growing - Local Growth Plan

**Get Cambridgeshire and Peterborough Growing.** The Cambridgeshire and Peterborough Local Growth Plan (October 2025) provides a strategic framework aimed at making the region the fastest-growing economy in the UK and a global innovation powerhouse by 2050. It sets out **six target sectors - Life Sciences, Advanced Manufacturing & Materials, Digital Technologies, Defence, Agri-Food & Agri-Tech, and Energy & Clean-Tech** – which currently contribute around 28% of the region’s GVA and are expected to grow to around 40% by 2050. As part of the plan, there is a focus on *strengthening capacity to support homes and economic growth*.

Within the plan, there is a focus on four region-wide opportunity zones which aim to spread growth and investment. One of these is Global City Cambridge, which aims to strengthen the area’s science and tech cluster and unblock key infrastructure gaps. Regional housing pressures are repeatedly raised through the Local Growth Plan and the plan recognises the need to **create both the housing and commercial space required to support growth in the region. Enhancing infrastructure** is recognised as a key priority and new developments such as Station Fields could have an important role to play in supporting the area’s significant ambitions for growth.

### Cambridgeshire and Peterborough Independent Economic Review

The **Cambridgeshire and Peterborough Independent Economic Review** was launched to establish an evidence-based growth strategy, and a Final Report was delivered in 2018. The report identified three distinct sub-regional economies including:

- Greater Cambridge - providing a cluster of innovation activity. This includes Cambridge, South Cambridgeshire, and parts of Huntingdonshire and East Cambridgeshire.
- Greater Peterborough – with a focus on manufacturing industries; and
- The Fens – with a focus on agri-tech and rural industries

The review positioned the area as nationally significant but noted significant housing constraints, with demand exceeding supply. The report warned that average prices and commuting had risen and were “choking labour supply”.

**The CPIER report stresses that the most urgent infrastructure and development priorities lie in and around Cambridge.** It states: *“Infrastructure issues are most urgent in and around Cambridge and must be dealt with as a first priority if the Gross Value Added (GVA) target is to be reached”* (p. 8) and concludes: *“Improvements in infrastructure, and further development, must start in and around*

Cambridge” (p. 8). The report further highlights that “*The greatest infrastructure pressures are concentrated in Greater Cambridge, where congestion and housing shortages risk constraining growth*” (p. 74) and warns that “*Addressing the backlog of housing and infrastructure in and around Cambridge is essential to sustaining the innovation economy*” (p. 88).

While this document was published in 2018, the area does continue to face infrastructure challenges noted more recently in the region’s Local Growth Plan. Housing schemes that can more easily connect skilled workers to major employment sites with shorter commutes could support the growth of priority sectors and respond to labour challenges.

## Local

### South Cambridgeshire Local Plan 2018

The *South Cambridgeshire Local Plan 2018* sets out a long-term vision for how the district should develop up to **2031**, focusing on delivering sustainable, well-planned growth that balances new homes, jobs, infrastructure and environmental protection. The Plan is closely aligned with the Cambridge Local Plan through a co-ordinated strategy for the wider Greater Cambridge area, recognising the functional relationship between the city and surrounding villages

The vision commits to providing the **required number of new homes and jobs** to meet objectively assessed needs, ensuring that housing delivery keeps pace with economic expansion in Greater Cambridge. This includes aligning new development with the area’s role as a major economic centre, particularly in knowledge-intensive sectors.

**Policy S/5** (Provision of New Jobs and Homes) confirms that over the period between 2011 and 2031, South Cambridgeshire will meet the objectively assessed need for 22,000 additional jobs to support the Cambridge Cluster. It will also meet the requirement for 19,500 new homes, including affordable.

The **Cambridge Biomedical Campus** (CBC) is recognised as an international centre of excellence for patient care, biomedical research and healthcare education. The Plan notes that it plays a local, regional and national role in providing medical facilities and medical research. **Policy E/2** (Cambridge Biomedical Campus Extension) confirms that an extension to the Cambridge Biomedical Campus will be supported for biomedical and biotechnology research and development within class B1(b) and related higher education and sui-generis medical research institutes.

### Draft Greater Cambridge Local Plan for Consultation (Regulation 18 version)

**The Draft Greater Cambridge Local Plan** brings together Cambridge City Council and South District Council for a first single joint Local Plan focused on the period from 2024-2045. The plan is in draft and in public consultation until 30 January 2026. The plan is an important document for governing planning in the local area and covers areas including housing, jobs, infrastructure and environmental protections.

The plan has a number of elements relating to housing, including:

- Rules that sites of 10+ dwellings must include 40% affordable housing, subject to exceptions – development of this size also need an appropriate mix of dwelling sizes informed by the latest evidence
- Provisions to support co-living developments under certain conditions, including when located in sustainable, highly accessible areas that are well connected to local services and employment by public transport or active travel

Meanwhile, the Plan’s sustainable transport and connectivity policy will require developers to contribute to improvements to public and community transport, and for developments to be located and designed to reduce the need to travel. This policy, which seeks to minimise travel distances and to help people use sustainable travel choices, could support developments near public transport such as the Station Fields proposal.

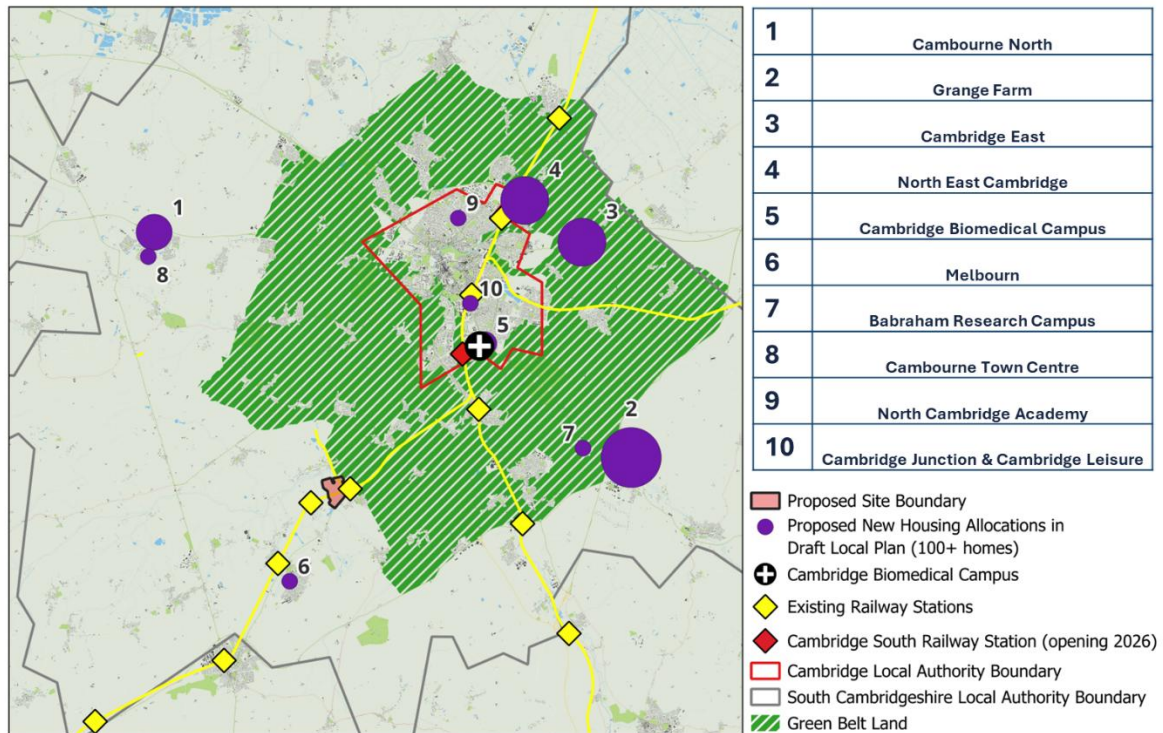
The Plan gives focus to growth in specific areas including urban areas of Cambridge, edge-of-Cambridge sites, and new settlements including around Cambourne North, Grange Farm, Northstowe, Watebeach, and Bourn Airfield. Key sites that have been highlighted include the following:

**Table A1.1 Key sites for growth**

Proposed Site Name	Expected Number of Dwellings in Plan Period
<b>North East Cambridge</b>	3,950
<b>Cambridge East</b>	3,950
<b>Eddington Densification</b>	2,500
<b>Cambridge Biomedical Campus</b>	1,000
<b>Cambourne North</b>	2,550
<b>Grange Farm New Settlement</b>	3,450

An illustrative map showing the locations of proposed new housing developments coming forward between 2024 and 2045 is also show below.

**Figure A1.1 Proposed Housing Allocations**



Source: Greater Cambridge Local Plan 2024-25

**Policy S/CBC** of the draft Plan states that the **Cambridge Biomedical Campus** (including Addenbrooke’s Hospital) is a **nationally important site**. It:

- Recognises the campus and its expansion area (through Green Belt release) as appropriate for healthcare, research, education, and related development.

- Emphasises the need for a coordinated masterplan to support national health services and life-sciences research.

### **Cambridge Biomedical Campus Supplementary Planning Document (SPD)**

Adopted in **April 2025** by both Cambridge City Council and South Cambridgeshire District Council, the SPD interprets and implements the 2018 Local Plans (Cambridge & South Cambs). It underscores CBCs role as an **international centre of excellence** for patient care, biomedical research and healthcare education, it also plays an important local, regional and national role in providing medical facilities and medical research

The SPD confirms the need for continued expansion to maintain its role as a world-class hub for healthcare, biomedical research, and education. It sets out principles for Phases 1–3 and anticipates a potential Phase 4 on land south and east of the current campus. Any future growth must be guided by a comprehensive masterplan, ensuring development is coordinated, sustainable, and well-connected to Cambridge South Station and the wider transport network.

The SPD emphasizes that future phases should deliver supporting infrastructure, public realm improvements, and enhanced pedestrian and cycle links. While its primary focus is on specialist uses, it allows for limited residential provision—particularly affordable or key-worker housing—to support the workforce. Overall, the document positions CBC’s expansion as **essential for meeting national and regional health and life science’s needs**, with growth tied to high-quality design and integrated planning.

The SPD recognises that the **Cambridge South railway station**, which is due to open in 2026, represents a significant development for the Campus and wider area, meaning that patients, visitors and employees will have much improved public transport connectivity to the Campus. Whilst the station is recognised as a primary destination station, it will mean that communities in the south of the city and beyond will have better access to the rail network. As such, the Campus is likely to have an increase in the number of people travelling through it to access the station, increasing pressure on the movement network. Following funding announced in the 2024 Spring Budget, work is also progressing on bringing forward the Cambridge South East Transport (CSET) public transport route, improving connectivity to the Campus and Cambridge South station from the south of the city.

### **Greater Cambridge Employment and Housing Evidence Update**

**The Greater Cambridge Employment and Housing Evidence Update** (December 2022) conducts a property market review of economic and employment evidence and forecasting and considers implications of the evidence for the local area.

The report highlights strong demand in lab-based and industrial sectors, and in particular notes the growth potential in the life sciences market. The report considers that the need for offices is generally being met (as of 2022) and that this would be exceeded by expansions in supply through proposals at North East Cambridge, Cambridge East, Cambridge Biomedical Campus, and Babraham Research Campus. However, the report identifies that housing delivery of 2,463 dwellings per annum is required to meet the preferred central jobs scenario based on modelled changes to the labour supply and population.

## A.2 Socio-economic Baseline

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This section provides an overview of the socio-economic baseline for the area to understand the key issues which Station Fields might be able to help address. Data has been collected for the combined area of Cambridge and South Cambridgeshire local authority areas and is benchmarked against the region of the East of England and England as a whole.

### Summary

- The **national economy remains fragile**, with unemployment rising to 5.1% in 2025, the highest rate since early 2021 (excluding pandemic peaks). CPI inflation was 3.8% in September above the Monetary Policy Committee's 2% target. Business confidence remains low with **economic uncertainty** cited by 33% of firms in an ONS survey in November 2025, the highest since early 2022<sup>17</sup>.
- **The UK economy is showing clear signs of strain, with official data pointing to recession risks.** The Office for National Statistics (ONS) notes that GDP fell by 0.1% in both September and October 2025, following near-zero growth in Q3, leaving the economy "close to a technical recession" (defined as two consecutive quarters of contraction). The Bank of England has warned that growth is "stuck" and that the UK could tip into recession if weakness persists, highlighting zero growth expectations for Q4 2025. While the Office for Budget Responsibility (OBR) does not declare a recession, its November 2025 Economic and Fiscal Outlook projects subdued growth of around 1.5% per year, well below historic norms, reinforcing the downbeat outlook.
- At a local level, the **population for the LIA is growing at a rate faster** than the national average, which supports the case for additional housing locally by creating more demand. The population is projected to keep increasing at a faster rate than nationally, keeping the demand steady for the next ten years.
- The population within the LIA is **forecast to age** in line with national averages, with a growing proportion of people aged 65 and over. This could make it harder for Cambridge to access the readily available workforce it needs and could also put pressure on health and care facilities in Cambridge.
- **Employment in Cambridge is growing.** Commuting flows shows the strong relationship between the two local authorities within the LIA, with large numbers commuting from South Cambridgeshire to Cambridge to work. This highlights the important role of South Cambridgeshire in meeting the workforce needs of Cambridge, supporting the case for additional housing in this area.
- There are clear **employment strengths in the health sector and particular strengths in life sciences, and research and health.** This supports the case for policies which support the growth of facilities like the Cambridge Biomedical Campus (CBC) which are important to this sector.
- In Cambridge the **economic activity rate** and **employment rate** is high, however there is a tight labour market, due to the fact that levels of unemployment are low. This makes it difficult for businesses to access the labour force they need.
- The **occupational** and **skills profile** in the LIA and South Cambridgeshire is aligned with the skills requirements of CBC, which employs highly qualified people in professional occupations.
- **Deprivation** in Cambridge and South Cambridgeshire is generally very low, however there are some pockets within the North East of Cambridge and the fringe areas of South Cambridgeshire.

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<sup>17</sup> [Business insights and impact on the UK economy - Office for National Statistics](#)

The main deprivation challenge in the area is around barriers to housing and services, especially in South Cambridgeshire, likely due to its rural geography.

## National Socio-economic Trends

The first half of the 2020s have been characterised by a number of shocks that have had major impacts on the economy globally. The period has included multiple years of the COVID-19 coronavirus pandemic and associated lockdowns (2020-2023), an energy and cost-of-living crisis (2021) and a global increase in interest rates (2022). These shocks have reverberated, and continue to do so, across the UK economy and have led to the sharpest rise in energy costs since the 1970s and the steepest sustained rise in borrowing costs since the 1990s. These are linked to wider challenges facing the UK, including an ageing society and increasing demands to increase spending on defence in response to rising global geopolitical tensions over recent years.

In early 2025, the introduction of new tariffs by US President Donald Trump has had a significant impact on global markets and presents uncertainty over future trade arrangements for businesses throughout the world. Together, these events and ongoing challenges present a challenging social and economic environment.

A new **Labour Government** was elected in the UK in July 2024, marking the first change in the Government political party since 2010. The party's election manifesto was focused on achieving 'change', with the priority mission of the Government set as '**growing the economy**'. The first year of the new Government has achieved limited growth, against a backdrop of challenging economic circumstances both in the UK and globally.

The **Autumn Budget 2025** was presented by the Chancellor of the Exchequer Rachel Reeves on 26<sup>th</sup> November 2025. The government announced that it will extend the freeze to personal tax thresholds for three years, and that from April 2029 only the first £2,000 of pension contributions made by each employee through a salary sacrifice scheme will be exempt from National Insurance contributions (NICs). The two-child limit on Universal Credit will be removed from April 2026. This change is expected to reduce the number of children in poverty by 450,000 by 2029/30. Public spending will now be about £32 billion a year higher in 2029/30 than had previously been forecast. This is largely the result of much higher welfare spending, which is itself mostly driven by the reversal of previous reforms to disability benefits, and the removal of the two-child benefit cap.

At the time of the Budget, the Office for Budget Responsibility (OBR) predicted that borrowing from 2025/26 to 2028/29 will be around £16 billion higher, on average, a year compared with its March 2025 forecast. Much of the additional borrowing is because the OBR expect underlying borrowing to be higher. The Chancellor's decisions contribute around £5 billion a year to the increase.

Since the Autumn 2025 Budget, the **OBR's predictions on growth in the UK economy** have been upgraded from 1% in March 2025 to 1.5% in November 2025 as of the Office's economic and fiscal outlook in November 2025.<sup>18</sup> Compared to March, real GDP growth between 2026 and 2029 averages 0.3 percentage points a year lower. The combination of a higher starting level of GDP and lower growth across the forecast period leaves the level of **real GDP in 2029 largely unchanged from the March forecast**. The near-term fiscal loosening in this Budget temporarily raises their central estimate of real GDP growth from 1.4 to 1.5 per cent in 2026-27 but has no impact on the level of real GDP by 2030-31.

In April 2025, the **International Monetary Fund** has **downgraded its growth forecasts** for the majority of countries around the world in response to the introduction of new trade tariffs by US President Donald Trump, citing "the direct effects of the new trade measures and their indirect effects through trade

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<sup>18</sup> [Office for Budget Responsibility – Economic and fiscal outlook – November 2025](#)

linkage spillovers, heightened uncertainty, and deteriorating sentiment”.<sup>19</sup> As of October 2025, the IMF state that the negative impact on the global economy is at the modest end of the range, thanks to the agility of the private sector in negotiating trade deals. As a result, global growth is now projected at 3.2% this year and 3.1% next year<sup>20</sup>. However, the rise of Artificial Intelligence (AI) related investment is supporting output while adding to price pressures from the tariffs.

The latest data available from the ONS indicates that employment in England, as of 2024, stood at around 28.4 million jobs<sup>21</sup> and in 2023 the value of the economy was estimated to be £1.9 trillion<sup>22</sup>. Between 2015 and 2024, total employment increased by around 2.4 million jobs (or +9.5%), whilst the growth in the value of the economy (as measured by GVA at 2022 prices) increased by 28% from 2009-2023.

According to the Bank of England in November 2025<sup>23</sup> twelve-month **consumer price index (CPI) inflation remains above the Monetary Policy Committee’s 2% target** but has reduced considerably from its peak of nearly 8.5% in mid-2023. CPI inflation was **3.8% in September**, up from 3.6% in June and 0.2 percentage points below expectations in the August Report. Energy price components accounted for most of the rise in headline CPI inflation since June. The current Bank Rate is 4%, maintained from August.

Since the Bank of England’s November 2025 Monetary Policy Report, GDP growth has remained slightly higher than estimates of underlying growth over recent quarters (Chart 1.7). **Headline GDP is projected to have grown by 0.2% in Q3, a little less than expected in the August Report.** This reflects weaker-than-expected growth in exports to the US, as well as disruption linked to the Jaguar Land Rover cyberattack. Headline GDP growth is expected to pick up to 0.3% in Q4. Meanwhile, forecasts project the unemployment rate to rise gradually from 4.8% in August to 5% in 2025 Q4.

Recent national data indicates that **unemployment** in the UK has risen to **5.1% for the period August–October 2025**—an increase of 0.4 percentage points from May–July 2025, and the **highest unemployment rate since early 2021** (excluding pandemic peaks)<sup>24</sup>. There are now approximately 1.83 million people unemployed, reflecting weakening hiring activity and a fall in payroll employment numbers.

Business confidence remains fragile and **economic uncertainty** was cited by 33% of firms in an ONS survey in November 2025, the highest since early 2022<sup>25</sup>.

**The UK economy is showing clear signs of strain, with official data pointing to recession risks.** The Office for National Statistics (ONS) notes that GDP fell by 0.1% in both September and October 2025, following near-zero growth in Q3, leaving the economy “close to a technical recession” (defined as two consecutive quarters of contraction)<sup>26</sup>. The Bank of England has warned that growth is “stuck” and that the UK could tip into recession if weakness persists, highlighting zero growth expectations for Q4 2025<sup>27</sup>. While the Office for Budget Responsibility (OBR) does not declare a recession, its November 2025

<sup>19</sup> [World Economic Outlook, April 2025; A Critical Juncture amid Policy Shifts](#)

<sup>20</sup> [World Economic Outlook, October 2025; Global Economy in Flux, Prospects Remain Dim](#)

<sup>21</sup> [Business Register and Employment Survey - Office for National Statistics](#)

<sup>22</sup> [Regional gross value added \(balanced\) by industry: all ITL regions - Office for National Statistics](#)

<sup>23</sup> [Monetary Policy Report - November 2025 | Bank of England](#)

<sup>24</sup> [Employment in the UK December 2025.pdf](#)

<sup>25</sup> [Business insights and impact on the UK economy - Office for National Statistics](#)

<sup>26</sup> [GDP monthly estimate, UK - Office for National Statistics](#)

<sup>27</sup> <https://www.bankofengland.co.uk/-/media/boe/files/monetary-policy-summary-and-minutes/2025/monetary-policy-summary-and-minutes-december-2025.pdf>

Economic and Fiscal Outlook projects subdued growth, well below historic norms<sup>28</sup>, reinforcing the downbeat outlook.

## Local Socio-economic Trends

### Population

As of 2024, there were 321,896 people living in the Local Impact Area (the Cambridge and South Cambridgeshire local authorities). The population has grown by 7% in the past five years, a higher rate than the regional (5%) and the national average (4%).

Of the existing population, there is a larger proportion of working age people in Cambridge and South Cambridgeshire (67%) compared to the regional (61%) and national (63%) average. In addition, there is a smaller proportion of people over the age of 65 years (16%) compared to regionally (20%) and nationally (19%). This means that the area has a large potential workforce to draw from, particularly in Cambridge, where the proportion of the working age people is significantly higher than South Cambridgeshire (74% and 60% respectively).

**Table A2.1: Age Breakdown (%) by different geographical areas, 2024**

	Cambridge	South Cambridgeshire	LIA	East of England	England
<b>0-15</b>	21,840	34,286	56,126	1,234,938	10,768,248
%	15%	20%	17%	19%	18%
<b>16-64</b>	110,147	104,059	214,206	4,028,657	36,870,761
%	74%	60%	67%	61%	63%
<b>65+</b>	17,365	34,199	51,564	1,312,711	10,981,092
%	12%	20%	16%	20%	19%
<b>Total</b>	149,352	172,544	321,896	6,576,306	58,620,101

Source: Local authority population estimates 2024

The latest population projections suggest that across England, the population is ageing rapidly. In the LIA the number of people aged over 65 years is projected to rise by 29% by 2035, which is on a par with the national average. However, the age group driving population growth in the LIA (which in total is 14% compared to 9% nationally) is the 16-64 age group, which is projected to rise by 14% compared to 8% nationally. This is positive for the LIA as it suggests that the working age population is likely to increase at a greater rate than the older population.

**Table A2.2 Population Projections 2025-2035**

	Cambridge	South Cambridgeshire	LIA	East of England	England
<b>0-15</b>	2%	-2%	0%	-8%	-9%
<b>16-64</b>	14%	14%	14%	8%	8%
<b>65+</b>	31%	28%	29%	29%	30%
<b>Total</b>	14%	13%	14%	9%	9%

Source: ONS Population projections for local authorities by single year of age and sex, 2022

### Employment

As of 2024, there were 208,000 people employed in the LIA. Of these, 58% of employment is concentrated in Cambridge and 42% is concentrated in South Cambridgeshire. Employment in the LIA has seen a 3% increase since 2019, a smaller rate of growth than nationally (5%). Employment growth has been largely driven by Cambridge, which experienced a 9% increase since 2019.

<sup>28</sup> [Economic and fiscal outlook – November 2025 - Office for Budget Responsibility](#)

Employment growth in the LIA has been driven largely by the health sector (+6,000 jobs) and the information and communications sector (+2,000 jobs). However, there has been a significant decline in the business administration and support services sector (-2,000 jobs). The Cambridge Biomedical Campus (CBC) predominantly attracts businesses from the health and life sciences sector, and this confirms the sector is growing, making the case for more housing to support this growth.

The highest levels of employment was in the professional, scientific and technical sector, which accounts for 43,000 jobs in 2024, an increase of 1,000 jobs since 2019. In addition, there are high levels of employment in the education and health sectors (accounting for 31,000 jobs each). The education sector has stayed the same since 2019, however as stated above the health sector has experienced rapid growth.

A location quotient (LQ) measures the degree to which a local area is represented in certain sectors compared to the nation as a whole. A LQ >1 indicates a higher level of representation compared to the national average. According to this measure, and as shown in Table A2.3, the LIA has the highest level of specialisation in the professional, scientific and technical sector (2.14), information and communication sector (1.85), education sector (1.78) and health sector (1.10). A RAG rating has been used in Table A2.3 to illustrate where the area has low levels of specialisation (red) and above average levels of specialisation (green).

Sub sector analysis has also been carried out for the life sciences and health research sectors, both of which were identified as key sectors of interest. These have both grown since 2019- life sciences has gained an additional 1,500 jobs and health research has gained an additional 500. A LQ analysis has been carried out for these sectors, however these cannot be accurately compared with the broad sectors as employment will overlap. Nevertheless, it does indicate great strengths in these sub-sectors. These sub-sectors are clearly important to the local area.

**Table A2.3 Location quotient analysis of employment in Cambridge and South Cambridgeshire, 2024**

Sector	Employment (2024)	Employment Change 2019-2024	LQ
Agriculture, forestry & fishing (A)	1,500	-500	0.62
Mining, quarrying & utilities (B, D and E)	1,000	0	0.43
Manufacturing (C)	12,000	-1,000	0.82
Construction (F)	7,000	0	0.67
Motor trades (Part G)	2,500	-500	0.66
Wholesale (Part G)	5,000	500	0.65
Retail (Part G)	11,000	-1,000	0.65
Transport & storage (inc. postal) (H)	3,500	500	0.33
Accommodation & food services (I)	13,000	-1,000	0.82
Information & communication (J)	18,000	2,000	1.85
Financial & insurance (K)	1,500	-750	0.22
Property (L)	3,500	500	0.76
Professional, scientific & technical (M)	43,000	1,000	2.14
Business administration & support services (N)	10,000	-2,000	0.55
Public administration & defence (O)	4,500	1,000	0.49
Education (P)	31,000	0	1.78

<b>Health (Q)</b>	31,000	6,000	1.10
<b>Arts, entertainment, recreation &amp; other services (R, S, T and U)</b>	9,000	1,000	0.97
<b>Sub Sectors</b>			
<b>Life Sciences</b>	5,000	1,500	6.8
<b>Research and Health</b>	3,000	500	21.6

Source: Business Register and Employment Survey, 2024

### Economic Activity

As shown in Table A2.4, the LIA has a high economic activity rate and employment rate compared to the national average. However, there are inequalities between the two local authorities. South Cambridgeshire scores extremely high at 87.7% for both metrics, whereas Cambridge lags behind the national average, with an economic activity rate of 75.8% and an employment rate of 73.9%. This is likely to reflect the large student population in Cambridge.

Unemployment is relatively low at 1.7%, lower than the regional average of 3.7% and the national average of 4%. In addition, the proportion of people aged 16-64 who are claiming benefits is low at 2.1%, compared to 3.3% in the region and 4.1% nationally.

**Table A2.4 Economic Activity in Cambridge and South Cambridgeshire, 2025**

	Cambridge	South Cambridgeshire	LIA	East of England	England
<b>Economic Activity Rate (age 16-64)</b>	75.8%	87.7%	82.2%	81.6%	79.1%
<b>Employment Rate (age 16-64)</b>	73.9%	87.7%	81.4%	78.7%	75.8%
<b>Unemployment Rate (age 16-64)</b>	N/A	N/A	1.7%	3.7%	4.0%
<b>Claimants as a proportion of people age 16-64</b>	2.1%	2.0%	2.1%	3.3%	4.1%

Source: Annual Population Survey, 2025; ONS Claimant Count, 2025

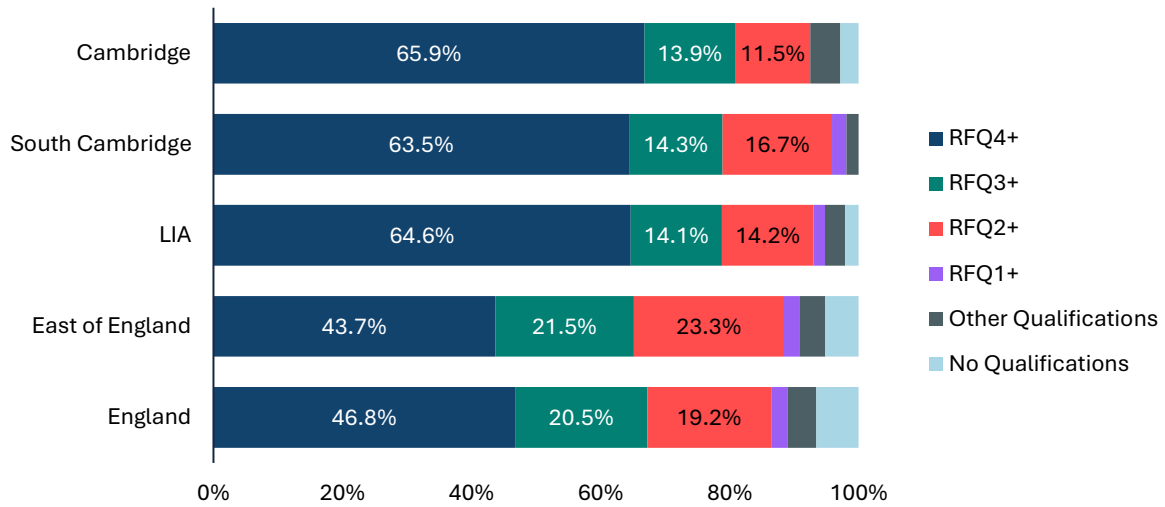
### Occupational and Skills Profile

Cambridge and South Cambridgeshire’s occupational profile is skewed towards professional occupations. The proportion of people working in professional, managerial or technical occupations in the LIA (49.5%) is higher than the regional average of 26.2% and the national average of 27.2%. The proportion of people working in other occupations is therefore lower than the regional and national benchmarks<sup>29</sup>.

There is a higher proportion of people in the LIA with qualifications of RFQ4 and above (64.6%) compared to the regional (43.7%) and national (46.8%) averages. There is also a lower proportion of people with no qualifications (2.1%) than the regional (5.2%) and national (6.6%) averages. This suggests that the local population is well qualified.

<sup>29</sup> Annual Population Survey, 2025

Figure A.2.2 Qualifications by RFQ, 2025



Source: Annual Population Survey, 2025

### Commuting

Data from the 2021 Census reveals that overall, more people commute into the combined Cambridge and South Cambridgeshire area than out of the area for work, with 36,157 people commuting in and 13,649 people commuting out.

Table A2.5 shows that the largest inflows were from Huntingdonshire, West Suffolk and East Cambridgeshire, and the largest outflows were to Huntingdonshire, West Suffolk and North Hertfordshire. A significant number of people commute between Cambridge and South Cambridgeshire for work, with 5,374 people commuting from Cambridge to South Cambridgeshire and 14,014 people commuting from South Cambridgeshire to Cambridge for work. This highlights the important role of South Cambridgeshire in meeting the workforce needs of Cambridge, supporting the case for additional housing in this area.

Table A2.5 Net flow of commuters into Cambridge and South Cambridgeshire, 2021

Place of Residence	Inflow	Outflow	Place of Work
Huntingdonshire	6,820	2,207	Huntingdonshire
West Suffolk	6,782	1,472	West Suffolk
East Cambridgeshire	6,720	1,421	North Hertfordshire
North Hertfordshire	2,132	1,352	East Cambridgeshire
Uttlesford	1,830	1,146	Uttlesford
Fenland	1,316	799	Peterborough
Central Bedfordshire	1,161	453	Central Bedfordshire
Peterborough	840	356	East Hertfordshire
King’s Lynn and West Norfolk	636	356	Fenland
East Hertfordshire	611	300	Stevenage
<b>Total</b>	<b>36,157</b>	<b>13,649</b>	<b>Total</b>

Source: Census, 2021

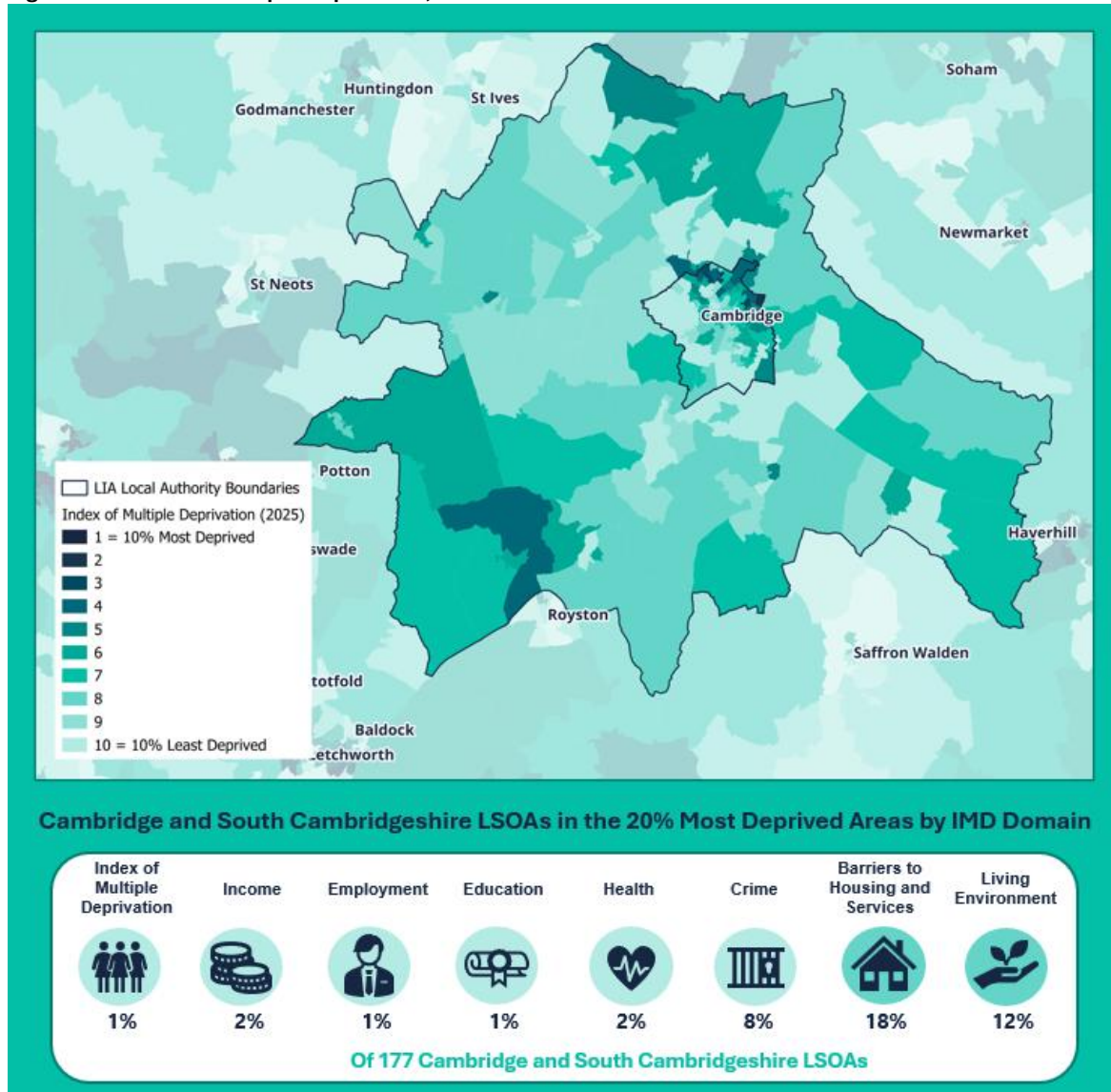
### Deprivation

According to the Index of Multiple Deprivation (2025), just 1% of neighbourhoods within Cambridge and South Cambridgeshire are within the 20% most deprived areas nationally, and none are within the top

10%. Figure A2.2 shows that deprivation is concentrated within the north east of Cambridge and the South Cambridgeshire villages of Kneesworth and Bassingbourn.

Across the different deprivation domains, the area generally performs well on each of them, however 18% of LSOAs are within the top 20% most deprived areas by Barriers to Housing and Services and 12% are within the top 20% most deprived areas by Living Environment.

**Figure A2.3 Index of Multiple Deprivation, 2025**



Source: MHCLG English Indices of Deprivation, 2025

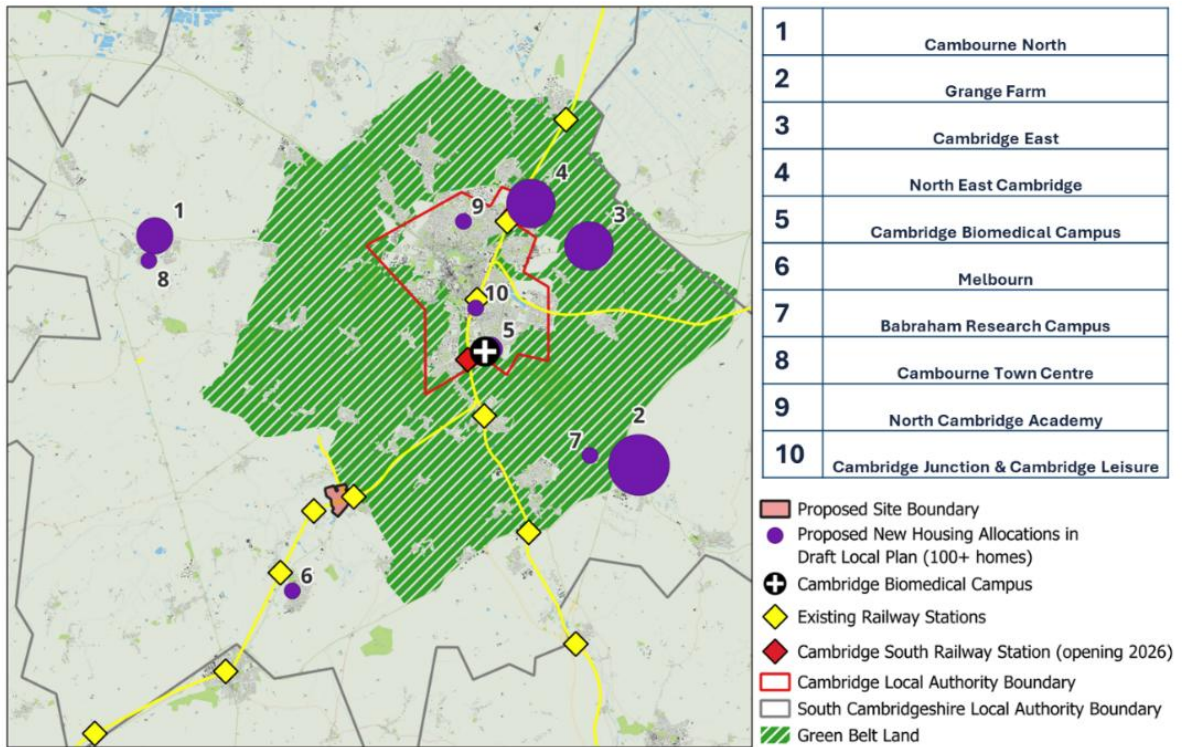
## A.3 Alternative Locations

The draft Greater Cambridgeshire Local Plan sets out a list of new site allocations to meet updated housing targets. This section considers how Station Fields compares to these alternative locations.

Updated housing targets have been set in response to an anticipated increase in 73,300 additional jobs in Greater Cambridge between 2024 and 2045. The Draft Local Plan sets out a requirement for 48,195 additional homes during this time, representing an uplift of 620 additional homes per year above the current adopted (2018) Local Plans. This reflects the government’s housing need calculation for the area using the updated standard method.

**Figure A3.1** below sets out the location of all proposed new housing sites which have the potential to deliver over 100 homes in the local plan period.

**Figure A3.1 New Housing Allocations in Draft Local Plan**



**Table A3.1** below sets out further detail on the proposed site allocations put forward in the current draft local plan, including the scale of development and timing of delivery.

**Table A3.1 Detailed list of Proposed Site Allocations in the Draft Cambridgeshire Local Plan**

Site Name	Planning Status	Location	Distance from CBC by Road	Proximity to existing train station and approximate travel time to CBC by train?	Likely to benefit from future public transport proposals?	Scale of proposed housing and likely mix/type if known (in plan period)	Timing of delivery/completion	Any constraints to delivery
<b>Station Fields</b>	Promoted  Not on greenbelt	Middle	5.6m	0.1m to Foxton  Currently 35 minutes by train and then a bus. Estimated travel time once South Cambridge Station opens is 15 minutes in total (7 mins on train)	No	2,000 dwellings	2030 onwards	Bridge over level crossing (developer would provide)
<b>North East Cambridge</b>	Proposed new allocation S/NEC  Not on greenbelt	Central	6.3m	0.4m to Cambridge North  Currently 35 minutes by train and then a bus. Estimated travel time once South Cambridge Station opens is c20 minutes.	No	3,950 dwellings	2032 onwards	Relocation of Cambridge Waste Water Treatment Works. Subject to <b>uncertainty over relocation</b> following Government decision not to fund this. This could constrain the number of homes that could be delivered onsite in the Local Plan period.
<b>Cambridge East</b>	Proposed new allocation S/CE	Central	4.2m	2.7m to Cambridge  Currently 1 hour 10 minutes by train and then a bus (or 50 minutes by	Cambridge Eastern Access	3,950 dwellings	2032 onwards	The absence of a fixed masterplan means overall site capacity remains <b>subject to</b>

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	Land released from greenbelt in previous plans to support development			bus). Estimated travel time once South Cambridge Station opens is 50 minutes by train.	East West Rail			<p><b>transport improvements.</b> Dependent on Cambridge Eastern Access busway (there is no agreed route or funding secured)</p> <p>East West Rail (Draft Local Plan suggests East West rail are considering a new station in East Cambridge but this station is not currently included in latest proposed rail line route<sup>30</sup>)</p>
<b>Grange Farm New Settlement</b>	Proposed new allocation S/GF  Not on greenbelt	Middle	7m	4.8m to Whittlesford  No train route available without driving to station. Approx. 45-minute journey by bus	CSET busway	3,450 dwellings	2034 onwards	<p>Delivery of CSET busway which is <b>subject to uncertainty.</b> Extension of CSET across A11/A1307 junction.</p> <p>(Application for CEST busway currently being reviewed by DfT and public inquiry will take place in 2026. Funding for</p>

<sup>30</sup> [East West Rail | Route Update Announcement](#)

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								project still subject to some risk.)
<b>Cambourne North</b>	Proposed new allocation S/CBN  Not on greenbelt	Middle	13m	9m to St Neots  No train route available without driving to station. Approx. 1 hour journey by bus. If East and West Rail line is completed, Cambourne station will be one stop away from Cambridge South which will significantly reduce journey times between the Site and CBC to around roughly 20/25 minutes.	East West Rail (new station at Cambourne linking town to new Cambridge South still awaiting full approval)	2,550 dwellings	2034 onwards	Delivery of East West Rail (phase 3 of the East West Rail line will deliver a new station in Cambourne, however this is still awaiting DCO approval)
<b>Eddington Densification</b>	Proposed new allocation S/NWC  Not on greenbelt	Central	5.5m	3m to Cambridge  No train route available without driving to station; approx. 1 hour 10-minute journey by bus	No	2,500 dwellings	2032-2041	None
<b>Cambridge Biomedical Campus</b>	Proposed new allocation S/CBC  A portion of development to be built on land released from greenbelt (approx. 22ha)	Central	0m	0m to Cambridge South  Site located adjacent to CBC, journey times will be short and can be accessed on foot	East West Rail, CSET busway	1,000 dwellings	2034-2042	Future phases of delivery will require land to be released from the Greenbelt
<b>North Cambridge Academy</b>	Proposed new allocation S/C/NCA	Central	5.8m	1.8m to Cambridge North	No	150 dwellings	2032-2034	None

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	Not on greenbelt							
<b>Cambourn e Town Centre</b>	Proposed new allocation S/CB  Not on greenbelt	Middle	13.2m	9.1m to St Neots	No	150 dwellings	2032-2035	None
<b>Babraham Research Campus</b>	Proposed new allocation S/BRC  Located on greenbelt	Central	6.9m	1.3m to Whittlesford	CSET busway	120 dwellings	2032-2034	None
<b>Cambridge Road. Melbourn</b>	Proposed new allocation S/RRA/CR  Not on greenbelt	Middle	8.1m	1.3m to Meldreth	No	120 dwellings	2032-2035	None
<b>Cambridge Leisure</b>	Proposed new allocation S/C/CLT  Not on greenbelt	Central	1.8m	0.6m to Cambridge	No	100 dwellings	2032-2034	None
<b>Land at Highfields (phase 2)</b>	Proposed new allocation S/RRA/H  Not on greenbelt	Middle	10.7m	7.7m to Cambridge	East West Rail	65 dwellings	2032-2034	None
<b>Maarnford Farm, Duxford</b>	Proposed new allocation S/RSC/MF	Middle	7.7m	1.5m to Whittlesford	No	60 dwellings	2032-2034	None

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Not on  
greenbelt

NB future travel times are estimated and assumes that South Cambridgeshire Station which will service CBC will be accessible within approximately 5 minutes before/after Cambridge

## A.4 Social and Economic Impact Assessment

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### Construction Impacts

The investment required to redevelop the Site for the proposed uses will create demand for construction workers during the build period. The number of temporary construction related workers has been estimated on the basis of a total estimated construction investment of approximately £620m.

Regional (East of England) levels of turnover per FTE within the construction industry were applied to the overall construction investment to estimate the FTEs. On this basis, it is estimated that the proposed redevelopment would generate demand for around **153** FTE temporary construction workers per annum.

These jobs will be a mixture of both on-site and off-site pre-fabrication and supply chain employment through the various tiers of the supply chain. This estimate is also an average level of construction employment over the duration of the build period (15 years), the level of workers required could be higher at peak periods of construction activity.

The large supply chain associated with the redevelopment of the building can result in substantial indirect and induced impacts. According to work by Professor Ball (Lichfields, 2018)<sup>31</sup> one direct job in the construction sector supports 0.5 indirect jobs in the supply chain. Applying a multiplier of 1.5 implies that the development supports an additional 76 indirect jobs per annum. This brings the total number of direct, indirect and induced jobs to **229** FTEs per annum.

As well as demand for construction workers, there will also be benefits at the construction stage in relation to Gross Value Added (GVA) – a measure of economic output. Overall, the GVA supported by all direct and indirect jobs is estimated to be **£240m** (Net Present Value - NPV) across the 15-year construction period.

It is expected that a proportion of the jobs supported during the construction phase will be accessible to residents of South Cambridgeshire and Cambridgeshire more widely. In addition, there are likely to be opportunities to support continuing and new apprenticeships, work placements and training.

These impacts are estimated on the basis of the following:

- Average levels of turnover and GVA per FTE for the construction sector in the East of England and South Cambridge areas
- An allowance for phasing and build-up of construction impacts over time.
- An adjustment to current prices through the application of a standard social time preference rate (discount rate of 3.5% per annum) from 2026 onwards (in line with HM Treasury Green Book guidance).
- An adjustment for displacement equating to 25%, which reflects low levels of displacement.

### Operational Impacts

#### Contribution to Housing and Affordable Housing Need

The Draft Greater Cambridge Local Plan sets out a target to deliver at least 48,195 additional homes between 2024 and 2045, or 2,295 per year. This is an increase of some 620 additional homes per year above the current adopted (2018) Local Plan and reflects the government's updated standard method

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<sup>31</sup> The Economic Footprint of House Building in England and Wales, Lichfields, 2018

housing need calculation for the area. Station Fields offers the potential to deliver up to **2,000** new homes and as a result, it could contribute 4% of the total requirement for homes over the plan period.

The draft Greater Cambridge Local Plan also sets out an affordable housing target of 40%. Station Fields is proposing to meet this target, delivering **800** affordable homes.

The delivery of new housing will deliver a number of benefits for the local area including helping to attract and retain a working age population, supporting young families and first time buyers, adding to the diversity of housing stock available in the local area and reducing the council’s housing waiting list.

An indicative housing mix for Station Fields is shown in **Table A5.1**.

**Table A4.1 Indicative housing mix**

	Market		Social Rent		Affordable Rent		Shared Ownership		Total	
<b>Unit type</b>	60%	1,200	3%	60	27%	540	10%	200		<b>2,000</b>
<b>1 bed</b>	5%	60	30%	18	30%	162	20%	40	<b>14%</b>	<b>280</b>
<b>2 bed</b>	25%	300	40%	24	40%	216	40%	80	<b>31%</b>	<b>620</b>
<b>3 bed</b>	40%	480	25%	15	25%	135	30%	60	<b>35%</b>	<b>690</b>
<b>4+ bed</b>	30%	360	5%	3	5%	27	10%	20	<b>21%</b>	<b>410</b>

### Demographic Benefits

In order to estimate the demographic and labour supply impacts of the proposals, we have drawn upon case study information for a similar scheme known as **Trumpington meadows**.

#### Trumpington Meadows



Source: Housing Design Awards

**Trumpington Meadows** is a housing development in the Cambridge Southern Fringe which aims to support the city's economic growth. The site was allocated for development within a Core Strategy and Area Action Plan, and outline planning permission for up to 1,200 1 to 5 bed homes was granted by Cambridge City Council and South Cambridgeshire District Council in 2009. Construction of 1,200 homes was completed in 2021 and of these, 40% are classed as affordable. The development is a 6-minute drive away from the Cambridge Biomedical Campus and a 33-minute walk.

Census data based on a best-fit of LSOA’s reveals that the household characteristics are made up of 1-6 person households with 93% accommodating between 1 and four persons. The areas consists of a mixture of detached houses (28%) semi-detached houses (27%) and flats and maisonettes (26%). The

majority of homes are owned (53%), many of which are with a mortgage (31%). Just over a fifth of houses are privately rented (21%)<sup>32</sup>.

As of 2024, the area had an estimated population of 6,755. Of these, 65% were of working age (16-64) years old), which is above the South Cambridge average (60%), and 25% were children aged 0-15, suggesting the area has attracted a high proportion of working-age parents with dependent children<sup>33</sup>. Of the working age population, 72% are economically active, higher than both the Cambridge average (59%) and the South Cambridge average (65%). The rate of unemployment is also low, at 2.2%<sup>34</sup>.

Trumpington Meadows' population is also well qualified, with 65% of people holding a level 4 qualification and above, higher than the rest of Cambridge (56%) and South Cambridge (48%). The majority of residents also work in professional occupations (43%)<sup>35</sup>. The area's occupation profile is not very diverse, with less people working in medium or low-skilled jobs. There is a shortage of people in skilled trades (5%), sales and customer services jobs (4%), process, plant and machine operative jobs (2%) and elementary occupations (6%).

Drawing upon the assumptions above (based on **Trumpington Meadows**) the potential demographic and labour supply impacts for Station Fields have been calculated and are summarised in **Table A5.2**. The specific assumptions are as follows:

- the average household size would be 2.5 persons per dwelling
- all residents will be new to the area
- the working age population (16-64) population is 65% (as per Trumpington Meadows)
- the economic activity rate for those aged 16 years and over is 71.6% (as per Trumpington Meadows)
- the proportion of people qualified to level 4 and above is 65% (as per Trumpington Meadows)
- the proportion of people working in high skilled qualifications is 43% (as per Trumpington Meadows)

**Table A4.2 Potential demographic and labour supply impacts of proposals**

	<b>2,000 homes</b>
<b>Increase in resident population</b>	5,013
<b>% increase in current population for South Cambridgeshire</b>	2.9%
<b>Increase in working age population (16-64 years)</b>	3,258
<b>Residents which are economically active</b>	2,728
<b>% change in economically active residents (South Cambridgeshire)</b>	3.2%
<b>Increase in residents qualified to Level 4+</b>	3,258
<b>Increase in residents working in professional occupations</b>	2,156

Source: GC Insight, drawing upon national statistics. Figures all rounded

### Household Expenditure

It is also possible to provide a broad estimate of potential household expenditure resulting from the proposed Station Fields development. Additional household expenditure in the area will help to boost the sustainability and vitality of local services, town centres and amenities. The estimated household

<sup>32</sup> ONS Census, 2021

<sup>33</sup> ONS Small Area Population Estimates, 2024

<sup>34</sup> ONS Census, 2021

<sup>35</sup> ONS Census, 2021

expenditure over the course of the next 15-year period, assuming housing is gradually delivered over this period, is likely to be in the region of **£123.7m** (NPV).

The estimated number of FTEs supported by annual household expenditure once the site is fully operational is estimated to be around **159** FTEs, around which approximately 31 of those jobs are expected occur in South Cambridgeshire.

These impacts are estimated on the basis of the following:

- Average household weekly expenditure (ONS Spending Data) in the East of England between 2022 and 2024.
- An allowance for phasing and the build-up of spending impacts over time.
- An adjustment to current prices through the application of a standard social time preference rate (discount rate of 3.5% per annum) from 2026 onwards (in line with HM Treasury Green Book guidance).
- An adjustment for displacement equating to 25% which reflects low levels of displacement.

## Employment

The proposed development at Station Fields will also include 5,000 sq m space for employment and community uses. An early-stage masterplan indicates that around two thirds of this space would be allocated for E class uses (including retail, office and light industrial) and a third allocated for community uses. The commercial provision will include space for small businesses, including flexible workspace. The community space will meet local needs (e.g. a health centre) and will be determined at a later stage.

The onsite employment impacts associated with each use class once all employment space has been delivered are summarised in **Table A5.3** below. This suggests that the site offers the potential to support an additional **195** FTE direct jobs.

**Table A4.3 Employment Impacts by Use Class**

Use Class	Floorspace (sqm)	Direct FTEs
Retail	1,250	64
Community	1,250	16
Office	1,250	92
Light industrial	1,250	23
<b>Total</b>	<b>5,000</b>	<b>195</b>

Source: floorspace areas provided by the client. Calculations made by GCI using standard employment densities

A recent report<sup>36</sup>, found that the median annual income of employees at CBC was £36,000, similar to Cambridge (£35,000) and South Cambridgeshire (£37,000) as a whole. Whilst this figure varied across sectors, it provides an estimated figure for potential employee salaries that could be supported onsite. This suggests that the site has the potential to support salaries of over **£7 million** annually once fully operational.

Furthermore, off-site jobs supported through indirect and induced impacts are estimated at around **97** FTEs. This brings the total number of jobs supported once all onsite employment space is delivered to **292** FTEs.

<sup>36</sup> [CBC-Housing-Study-Report-Final-May24.pdf](#)

As well as creating opportunities for local employment, there will also be benefits from the operational stage in relation to GVA. Assuming that employment space will be delivered gradually over the 15-year construction period, it is estimated that the onsite employment space could deliver a total GVA impact of **£97m (NPV)** during this time.

These impacts are estimated on the basis of the following:

- An allowance for phasing and the delivery of employment space to support new jobs over time.
- An adjustment to current prices through the application of a standard social time preference rate (discount rate of 3.5% per annum) from 2026 onwards (in line with HM Treasury Green Book guidance).
- An adjustment for displacement equating to 25% which reflects low levels of displacement.

## Agglomeration Benefits

The role of housing in supporting the economy in terms of agglomeration and productivity effects is widely recognised at all policy levels. Locations with a larger labour pool within shorter commutes makes them a more attractive investment proposition for companies seeking diverse talent, enabling better skills matching, improved retention and stronger prospects for growth with a shared pool of resources. However, the circumstances that are most likely to lead to these impacts and the strength of the relationship between housing and agglomeration effects varies.

Recent research for Homes England<sup>37</sup> explored both the quantitative and qualitative role of housing in productivity growth and demonstrates that Cambridge is an area where housing can support productivity growth and agglomeration effects. The research highlights that the unavailability of housing is a key push factor for some businesses deciding whether to locate or stay in the area.

In quantitative terms, the research found that there is a statistically significant impact of rising housing costs and affordability challenges on the productivity of London, the east and south east. Accordingly, a 5% increase in housing stock would be associated with a 10% reduction in house prices and a 3.1% increase in productivity. Qualitative research through a series of case studies across local authorities, including Cambridge, found that evidence of productivity growth and agglomeration effects associated with local industrial clusters (such as the life sciences in Cambridge) are inherently reliant on local conditions to thrive, including having access to the right talent, which in turn requires affordable housing to be available to workers. Stakeholders in Cambridge cited key 'pull factors' to Cambridge as being its pool of skilled workers amongst other things.

By providing a substantial supply of housing, including affordable housing, in close proximity to CBC, Station Fields will facilitate labour mobility and pooling (enabling more productive job-worker matches) at a faster rate, and in turn support continued agglomeration and productivity growth. As set out above, the Proposed Development will increase the labour supply in proximity to CBC by around 2,728 persons (based on benchmark economic activity rates). This is a substantial potential pool of labour within seven minutes commute distance of CBC as well as central Cambridge which will contribute to the areas attractiveness to like-minded companies potentially seeking to locate at CBC.

## Fiscal Benefits

It is estimated that the proposed Station Fields development could support in the order of **£17.3m (NPV)** in **Council Tax** over the course of a 15-year period.

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<sup>37</sup> Homes England, July 2025, Housing Affordability and Productivity

The current (2025-26) income from Council Tax for South Cambridgeshire is £20.4 million. Once all 2,000 homes are delivered, in a single year, the Council Tax income derived from Station Fields could therefore increase total council tax income for the area by around 2%. This would make a significant contribution towards the delivery of services locally.

Furthermore, the development is estimated to support **£1.0m** (NPV) in **business rates** over the 15-year delivery period.

These impacts are estimated on the basis of the following:

- Use of the average Council Tax charge for Band C homes within the South Cambridgeshire area, reflecting the large number of 3 and 4 bed homes being proposed.
- A proportion of 8% of total council tax is assumed to be allocated to South Cambridgeshire District Council, based on the council tax bill breakdown for 2025/26.
- A business rates multiplier (0.56) for 2025/26 which is then applied to the rateable value, calculated using the development's floorspace and the average rateable value per sqm for each business floorspace use in South Cambridgeshire (Valuation Office Agency data).
- An allowance for phasing and the build-up of fiscal impacts over time.
- An adjustment to current prices through the application of a standard social time preference rate (discount rate of 3.5% per annum) from 2026 onwards (in line with HM Treasury Green Book guidance).
- An adjustment for displacement equating to 25% which reflects low levels of displacement.

