



Representations to the Greater Cambridge Local Plan Regulation 18 Draft

Land at Six Mile Bottom

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Prepared for:
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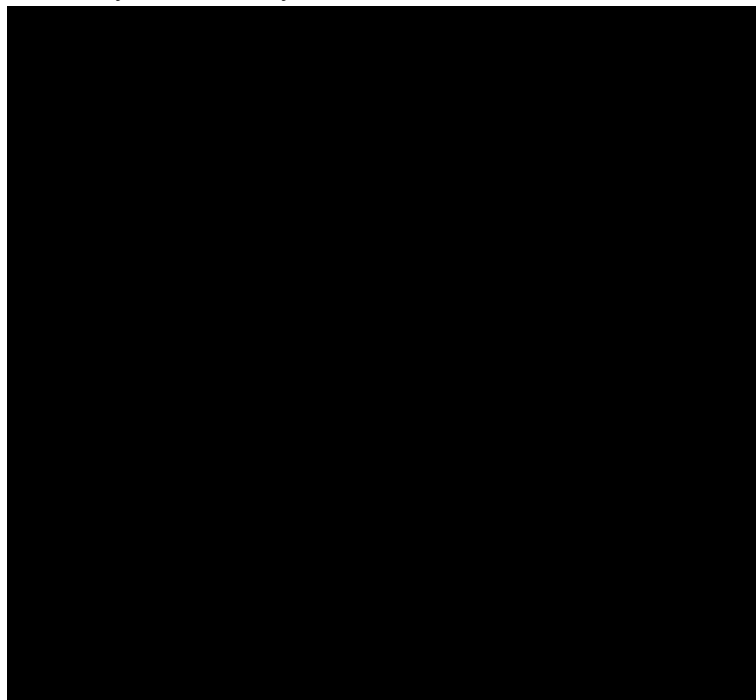
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Executive Summary

These representations support the Greater Cambridge Local Plan's overarching ambitions on climate action, biodiversity, wellbeing, placemaking and infrastructure but argue that the **scale and distribution of growth proposed are too limited**. The draft plan's housing and employment numbers fall short of regional and national ambitions for Cambridge as a critical innovation hub. Evidence from Oxford Economics and national policy suggests far higher job creation and housing need. The current modest growth scenario would constrain labour supply, affordability, and long-term competitiveness in key sectors such as life sciences, digital technologies, advanced manufacturing and clean energy.

The plan is also **overly dependent on complex and uncertain sites** – such as Cambridge East, North East Cambridge, Cambourne and Grange Farm – whose delivery relies on large infrastructure schemes and in some cases relocation of major operations. In the case of Cambourne and Grange Farm, there is a particular reliance on other consenting processes for transport infrastructure which in itself adds greater risk and uncertainty to the deliverability of the plan. There is also a disagreement at a strategic level as to what the transport solution should be with Major Paul Bristow actively opposing busway schemes in the area in favour of light rail solutions. This creates risk in the housing and employment land supply pipeline. Additionally, concentrating roughly 60% of new homes in and around Cambridge exacerbates affordability pressures and limits the ability to provide varied housing types, particularly family homes with access to green space.

We advocate that the Local Plan, at the very least, adopts the high growth scenario from the Icen Report to better meet the economic aspirations of the area, along with inclusion of strategic allocations that assist in **redistributing growth eastwards**, especially at Six Mile Bottom, which sits at the intersection of three strategic economic corridors. Its scale and location are presented as highly suitable for a new settlement that can deliver housing, R&D space, mid-tech and logistics floorspace and benefits from proximity to major research campuses. It also aligns with progressive infrastructure plans such as the Newmarket line enhancements and the Cambridge East transport strategy. This approach would help address the imbalance of growth and opportunities within the subregion.

Overall, we recommend that Greater Cambridge adopts a **more ambitious, flexible and resilient development strategy**, planning for higher growth scenarios and allocating additional strategic sites. Doing so would better reflect the area's economic potential, support the Government's Industrial Strategy, provide a stronger supply pipeline, improve affordability, and ensure the region continues to function as a globally competitive centre for innovation



1 Introduction

- 1.1.1 These representations respond to the Greater Cambridge Local Plan (Reg. 18 Draft) and its refreshed evidence base. They build on our representations to the ‘First Proposals’ consultation in 2021 and the accompanying Housing & Employment Forecasts and SA Compliance Review, which identified the need for more ambitious housing and jobs assumptions consistent with Greater Cambridge’s innovation-led economy and growth objectives within the sub-regional context.
- 1.1.2 Since 2021, the Cambridgeshire & Peterborough Combined Authority (CPCA), led by Mayor Paul Bristow, has articulated clearer growth leadership through its Corporate Plan 2025–29 and the emerging Local Growth Plan (LGP), framing Growth, Connectivity, Jobs, Homes, Resilience and Opportunity Zones. The LGP sets scenarios to double and even triple GVA by 2050, with priority sectors (Life Sciences, Advanced Manufacturing & Materials, Digital & Defence, Agri-Food Tech, Clean-Tech) and enabling infrastructure (Water/Energy/Rail/Housing), requiring aligned spatial planning for homes, jobs and infrastructure.
- 1.1.3 Against that backdrop, we present the case for elevated growth to better reflect the economic ambitions of the area and the accompanying higher housing needs that should be accounted for. To meet this need, further major allocations should be considered within the development strategy, and should, in particular, not ignore opportunities to deliver strategic growth towards the eastern side of the subregion at Six Mile Bottom (HELAA Site Reference 40078). Strategic growth here will be positioned in a particularly advantageous point between three key economic corridors, with limited constraints and the opportunity for a public transport strategy to be initiated quickly and with greater certainty compared to other major allocations. This in turn will provide the Councils with a more robust housing and employment trajectory that can be relied upon to meet the soundness tests set out in the NPPF.



2 Representations to Chapter 1 ‘About the Plan’

The Context for Growth

2.1 National Priorities

- 2.1.1 The Government has repeatedly committed to increasing housing numbers and economic growth in a bid to meet the goal of 1.5 million homes by 2029. In an effort to do so, updates to the NPPF were brought forward and adopted on the 12th of December 2024. Those updates sought to specifically boost housing delivery and re-orient the planning system towards stimulating modern growth sectors by facilitating laboratories, gigafactories, data centres, digital infrastructure, freight and logistics.
- 2.1.2 The Government’s commitment to sustained economic growth has been transferred into ‘The UK’s Modern Industrial Strategy 2025’ (“The Industrial Strategy”), which states that “growth is the number one mission of this government.” The Industrial Strategy sets out a 10-year plan to deliver certainty and stability to businesses to encourage investment in high growth sectors. The ambition of the Industrial Strategy is to drive growth at both national and regional level ensuring economic security and resilience. Maintaining and delivering a high-quality stock of business premises, including science and technology floorspace that could accommodate life science floorspace (which is specifically identified as a ‘priority sector’), is crucial in ensuring that the targets set out in The Industrial Strategy are met.
- 2.1.3 The strategy identifies city regions and clusters across the UK citing the Oxford to Cambridge Growth Corridor, alongside others, as imperative to collaboration, jobs, businesses, and UK talent. It highlights strengths in life sciences, digital and technologies, advanced manufacturing, and clean energy industries, anchored by two of the best universities in the world, contributing £40 billion to the economy a year. The strategy will support their strengths through funding the Cambridge Growth Company to address the shortage of high-quality research facilities and invest in infrastructure to unlock housing and commercial development.

2.2 Oxford–Cambridge Region

- 2.2.1 The Oxford-Cambridge Supercluster Board ‘Oxford-Cambridge Supercluster Scenario Modelling’ Report dated October 2024 suggests that the ‘Ox-Cam’ region has the potential to make a major contribution to the Government’s Industrial Strategy and deliver substantial economic growth for the country over the next ten years. The analysis reports that with the right investment and the necessary policy reforms, the region could double its growth trajectory – adding £25bn in GVA every year to the economy by 2035 compared with today.” To achieve the high growth scenario, the Supercluster Board mandate for 370,808 more houses and 26.5 million square feet (c. 2,460,000 sqm) of new laboratory space in the Ox-Cam region to fulfil growth in high knowledge-intensive sectors.

2.3 UK Innovation Corridor

- 2.3.1 The London to Cambridge tech corridor strategy, spearheaded by the UK Innovation Corridor (UKIC), aims to create a global powerhouse in science and technology (life sciences, AI, clean tech) by linking London's capital with Cambridge's research, fostering collaboration, attracting investment, and boosting infrastructure, skills, and housing to rival global innovation hubs and significantly increase regional GVA. Key actions involve investment prospectuses, infrastructure projects like East-West Rail, and strategic focus on R&D, scale-ups, and job creation.

2.4 Cambridge Norwich Corridor

- 2.4.1 The Cambridge Norwich Tech Corridor (CNTC) is a strategic initiative aimed at fostering economic growth, innovation, and high-tech development between the two cities, capitalising



on the £120 million dualling of the A11. It connects the high-tech, research-focused economy of Cambridge with the growing tech, digital, and life sciences sectors in Norwich. The strategy aims to boost productivity, create high-value jobs, and increase wage growth in the region, which has shown a strong rebound with employment growth in sectors like ICT and scientific research

2.5 Cambridgeshire & Peterborough Combined Authority (CPCA)

2.5.1 The Cambridgeshire and Peterborough Combined Authority (CPCA), published its Economic Growth Strategy in 2022. The Strategy identifies Cambridge as an internationally renowned centre of excellence and that high value sectors are core to the UK's global success. The Independent Economic Review that underpins the Strategy confirms that Life Sciences, and Digital & IT are priority sectors for the combined authority region's economic growth.

2.5.2 This ambition has been captured in the CPCA Local Growth Plan (LGP), launched by Mayor Paul Bristow on 10 December 2025. The Local Growth Plan sets out how the region can unlock its economic potential. In order to do this the LPG identifies Cambridge as an 'Opportunity Zone' which has the potential to 'turbocharge the world's leading science and tech cluster and unblocking of infrastructure gaps'. This is further recognised in the identification of the six high growth sectors that will drive economic growth in the region:

- Life Sciences
- Advanced Manufacturing and Materials
- Defence
- Digital Technologies
- Agri-Food and Agri-Tech
- Energy and Clean-Tech

2.5.3 In terms of maximising growth opportunities, the LGP (p.171) recognises that the next step in terms of rail improvements is to look eastwards and invest in the dualling of the Newmarket line to improve capacity and resilience, enhancing connectivity from the east (and to Cambridge East) and "unlocking the full economic and social potential of the Greater Cambridge area." This has relevance to Six Mile Bottom given its location as a potential strategic growth site on the Newmarket line and the potential reintroduction of a station here.

2.6 Cambridge Growth Company

2.6.1 The Cambridge Growth Company (CGC), chaired by Peter Freeman, has commissioned work and evidence to underpin the Government's growth ambitions for Greater Cambridge with the aim of maximising the area's economic potential and delivering 'nationally significant growth'. It is expected that updates to this work will be published in Spring 2026 (yet to be confirmed) and may set homes and jobs targets for Greater Cambridge for the long term up until 2050. This includes potential establishment of a development corporation to bring powers to fund and coordinate interventions and remove delays to sustainable development.



2.7 Summary

- 2.7.1 The above context confirms that there is significant economic growth opportunity within and beyond Greater Cambridge, which is recognised at a national level and has generated increasing attention since the Greater Cambridge 'First Proposals' in 2021. Unlocking that potential is key and supporting it with the necessary infrastructure will be important as well as considering where growth is best placed to support these local and national objectives.

Recommendation: The evidence base and context for the Greater Cambridge Local Plan and its development strategy should give much further attention to the eastern side of the subregion where it is largely silent in terms of recognising the key growth corridors that sit alongside the A14/A11/M11 including the Cambridge to Norwich Tech Corridor and London-Cambridge Innovation Corridor. The potential dualling of the Newmarket line and Cambridge East Transport Strategy are laying the foundations for enhanced access and sustainable travel movements in this direction and locations such as Six Mile Bottom provide huge potential to contribute to the long term economic and housing needs of the area and better address the imbalance in growth and economic opportunities in the subregion.



3 Representations to Policy S/JH: New Jobs and Homes

3.1 Calculating Need for Housing and Jobs

- 3.1.1 Paragraph 61 of the NPPF states that “to support the Government’s objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed.” Local housing need should be informed by the standard method, which is based on housing stock and affordability ratio – but the NPPF is clear (paragraph 62) that this is a minimum: “To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning practice guidance.” Authorities should, therefore, consider planning for higher growth as appropriate e.g. to reflect economic growth aspirations.
- 3.1.2 In relation to business needs, the PPG (Paragraph: 026 Reference ID: 2a-026-20190220) advises that in gathering evidence to plan for business uses, local authorities will need to liaise closely with the business community and take account of the Local Industrial Strategy to understand their current and potential future requirements.
- 3.1.3 Policy S/JH articulates the area’s objectively assessed needs for homes, jobs and employment land over the plan period. The number of additional jobs to support the Greater Cambridge economy is set at 73,300 jobs with 48,195 homes to facilitate this new employment. This equates to 2,410 homes per annum, which is slightly higher than, but similar to, the standard method calculation.
- 3.1.4 Greater Cambridge plays a nationally significant role as highlighted by the Government in the ‘UK’s Modern Industrial Strategy 2025’ as a core component of the Oxford to Cambridge Growth Corridor. The strategy identifies city regions and clusters across the UK citing the Oxford to Cambridge Growth Corridor, alongside others, as imperative to collaboration, jobs, businesses, and UK talent. It highlights strengths in life sciences, digital and technologies, advanced manufacturing, and clean energy industries, anchored by two of the best universities in the world, contributing £40 billion to the economy a year. The strategy will support their strengths through funding the Cambridge Growth Company to address the shortage of high-quality research facilities and invest in infrastructure to unlock housing and commercial development.
- 3.1.5 Unlocking this economic potential is fundamental to the ambitions of the Industrial Strategy and we have provided a high-level assessment of the economic scenarios against the Greater Cambridge growth scenarios to assess whether this ambition is being reflected in the current draft Local Plan in accordance with the NPPF and PPG.

3.2 Greater Cambridge Growth Scenarios

- 3.2.1 The accompanying **Greater Cambridge Growth Scenarios Report (2025)** by Stantec (**Appendix A** to this letter) assesses the implications of adopting alternative economic growth scenarios for Greater Cambridge, with reference to the differing approaches and outcomes of the Greater Cambridge Iceni Employment and Housing Needs Update and the Oxford Economics Growth Scenarios – the latter of which was commissioned by the Ministry of Housing, Communities and Local Government (MHCLG).
- 3.2.2 The baseline and standard method positions, alongside Iceni’s central scenario, are closely aligned with housing need reflecting around 2,300 homes per annum linked to jobs growth of approximately 73,000 jobs up to 2045. Whilst this provides consistency between employment and housing provision, it represents a *modest* growth trajectory.
- 3.2.3 In contrast, the Oxford Economics evidence points to substantially higher levels of job creation driven by knowledge intensive and life science sectors, with even the low growth scenario



requiring **3,700 homes per annum** and the high growth scenario requiring **5,600 homes per annum** to support between 144,000 and 229,000 additional jobs. These figures far exceed both the standard method and Icení's central scenario and indicate greater population growth. When considered alongside national planning policy, the UK Industrial Strategy and sector-specific growth plans, the Oxford Economics scenarios appear more closely aligned with the Government's wider economic ambitions for Greater Cambridge and its role within the Oxford-Cambridge Growth Corridor.

- 3.2.4 Taken together, the evidence suggests that the Council's approach is not aligned sufficiently with the MHCLG's ambitions for the area and the UK Industrial Strategy and therefore risks constraining economic potential in Greater Cambridge. A more ambitious strategy, aligned with Oxford Economics' forecasts, would better reflect Greater Cambridge's growth prospects and necessitate higher housing targets to ensure that labour supply, affordability and economic growth are not undermined.

Recommendation: Greater Cambridge should plan for at least Icení's high employment growth scenario, which would necessitate a corresponding uplift in housing delivery to ensure that labour supply, affordability and long-term economic competitiveness are not constrained.

3.3 Local Need for Offices and Laboratory/R&D Floorspace

- 3.3.1 In September 2024, Greater Cambridge published evidence on the locational and accommodation needs of key sectors of life science and ICT in its 'Greater Cambridge Growth Sectors Study: Life science and ICT locational, land and accommodation needs'.

- 3.3.2 The Icení Report identifies the need for 600,000 sqm of R&D, 289,700 sqm of office, and 200,000 sqm of industrial and warehousing space, which is based on job forecasts, completions, and market signals. In the context of the Ox-Cam Supercluster Board's identified need for 2,461,931 sqm of laboratory space¹ to meet full growth potential in the Ox-Cam region, this means that Icení's forecast of 600,000 sqm equates to, conservatively, 25% of the Oxford-Cambridge region's need, highlighting the importance of delivering R&D floorspace in Greater Cambridge. These figures, when considered in the context of the Oxford Economics forecasts, give strong indication that further employment space in these sectors will be required in key locations.

- 3.3.3 Six Mile Bottom (HELAA Site Reference 40078) performs well on many of the key criteria identified in the Icení Report, including:
- Accessibility and location: the site is strategically located at the confluence of three nationally significant economic corridors including the Ox-Cam corridor, the Cambridge Norwich Tech Corridor and the London to Cambridge 'Innovation Corridor'.
 - Proximity to clusters and growth areas: the Icení report notes that proximity to research centres is a key locational priority for many businesses in the area. Six Mile Bottom is located near to research campuses (Granta Park and Babraham Research Campus) and planned development to the east of Cambridge, benefitting from agglomeration, a key focus of the government.
 - Place-based business destinations and space for start-ups and scale ups – the scale of Six Mile Bottom enables it to deliver a series of complementary centres incorporating community uses, innovation space, employment and education campuses set amongst a rich and biodiverse green environment. This follows the overall aspiration to provide placemaking infrastructure that will facilitate the emergence of a sustainable modern new community and ensure the future needs of research and innovation are met.

¹ <https://oxcamsupercluster.publicfirst.co.uk/Oxford%20-%20Cambridge%20Scenario%20Modelling-2.pdf>



3.4 Need for Mid-Tech and Logistics Floorspace

- 3.4.1 Mid-tech supports R&D by bridging the gap between research and production, providing facilities for prototyping, testing, and scaling innovations, and enabling the translation of discoveries into commercial products. While we understand Icenis is currently reviewing warehouse and industrial location requirements in Greater Cambridge, their latest work (Greater Cambridge Employment and Housing Evidence Update 2023) has identified a significant shortfall in such space of 149,163 sqm – which is likely to underestimate real demand.

- 3.4.2 The Icenis Report highlights a need for 200,000 sqm of industrial and warehousing space. Although it is unclear how this need would be met in terms of land supply, and based on past under-supply, it is considered that this figure should be much higher. Six Mile Bottom has scope to deliver additional industrial and warehousing space alongside laboratory/R&D floorspace, with it being well situated near the junction of the A11/A14 and on the route of the potential dualling of the Newmarket line. With delivery of the Cambridge Eastern Access project and wider infrastructure investment across the region, this connectivity will only strengthen, highlighting the locational strength of this eastern strategic growth site.

Recommendation: Considering Cambridge's leading role in the UK's innovation economy, the forthcoming stage of evidence must evaluate if the level of need identified by Icenis is adequate to support that ambition. This subsequent phase of plan-making will be essential in determining whether planning policy and land allocations can effectively meet the Government's objectives, thereby preserving Greater Cambridge's global competitiveness and fully seizing emerging opportunities in life sciences, AI, and other innovation-driven sectors. Taking the above into account and recognising the national growth ambitions would ensure that the emerging Local Plan aligns with national policy as stipulated by paragraph 36(d) of the NPPF.



4 Representations to Policy S/DS: Development Strategy

- 4.1.1 The Development Strategy (S/DS) sets out the overarching approach to how the area will grow over the next two decades. It establishes the scale of new housing and employment development required to support the region's economic strength while seeking to address affordability pressures. The strategy emphasises that growth must be planned in a way that supports climate objectives, protects the natural environment, and ensures that new development is supported by the right infrastructure at the right time.
- 4.1.2 A central theme of Policy S/DS is directing growth to the most sustainable locations. This means prioritising development within Cambridge itself, where active travel and public transport options are strongest, and focusing larger-scale growth in new settlements or strategic sites in South Cambridgeshire that can be comprehensively planned. The strategy allows only limited, evidence-based Green Belt release where the sustainability benefits clearly outweigh the harm. Smaller-scale development in villages is supported only where services, facilities, and transport capacity make it appropriate.
- 4.1.3 The implementation of the Local Plan is increasingly reliant on the Cambridgeshire and Peterborough Local Growth Plan, the forthcoming Sustainable Development Strategy (SDS) at the Cambridgeshire and Peterborough level, and the Cambridge Growth Company's strategy, in addition to delivery and certainty over essential infrastructure such as the Cambourne to Cambridge transport corridor and East West Rail. These dependencies are accompanied by wider enabling necessities, including the provision of water, energy, and social infrastructure. As these strategies and interventions advance, it is crucial that they are guided by consistent evidence and aligned assumptions regarding spatial strategy, infrastructure provision, and phasing.
- 4.1.4 Delivery of additional homes and employment land is concentrated mostly at Cambourne, Grange Farm and within Cambridge at high density urban districts at North East Cambridge ("NEC"), Cambridge Airport and Eddington. Our **first concern** with this approach is that the development strategy does not provide a wide range of homes and jobs and is heavily reliant on commuting to Cambridge and high density living environments and risks not meeting the needs for all, for example for family housing.
- 4.1.5 The pandemic has shown that high density living and a lack of access to green spaces can produce negative health and wellbeing effects. There is a role that higher density, urban development's play in meeting certain housing needs but thought also needs to be given to development of new communities on sites that: facilitate greater space for people; provide a greater variety of housing; increase affordability for those unable to afford urban prices; and provide opportunities to connect with the surrounding countryside to improve mental and physical health.
- 4.1.6 Our **second concern** is that the development strategy is not diverse or flexible enough to respond to changing circumstances and affordability. It is too reliant on development within Cambridge and existing new settlements and employment clusters to deliver the area's growth needs, rather than redistributing growth to the wider area, such as the east of the subregion - offering up opportunities to widen the economic base and provide a greater mix of housing locations and prices.
- 4.1.7 Around 60% of the Local Plan's new housing allocations would be located in or around Cambridge. With so much focus on city development, we question how affordable such developments are likely to be given house prices are currently 11.31 times the median annual salary in Cambridge². By way of comparison, the price of a new 3 bed house in Northstowe

² Office of National Statistics, March 2025



typically ranges from £374,000-480,000 whereas in Cambridge it is significantly higher at a range of £525,000 to £900,000.

- 4.1.8 Current affordable housing delivery rates for the Greater Cambridge area as a whole have averaged 568 affordable dwellings per annum over the period 2018/19-2023/24, which represents the most up to date information published by the Councils. These delivery rates are significantly below the identified affordable housing need required for the proposed plan period. Affordable housing therefore provides strong justification for utilising a higher housing need number, thus stimulating more affordable housing delivery. This is supported by Paragraph 024 (Ref:ID:2a-024-20190220) of the 'Housing and Economic Needs Assessment' section of the Planning Practice Guidance, which states that "An increase in the total housing figures included in the plan may need to be considered where it could help deliver the required number of affordable homes."
- 4.1.9 With the cost of remediation and redevelopment of brownfield sites like NEC, and the infrastructure burden, we expect affordable housing levels will struggle to reach 40%, which will compound the problem. To address this, new settlements offer a significant opportunity to broaden the choice and affordability of new housing and should be given further consideration within the development strategy.

Recommendation: We recommend that further growth is redistributed to the wider area, such as the east of the plan area, in new settlements that can offer up opportunities to widen the economic base, provide more affordable housing and employment spaces compared to those currently focused in Cambridge and improve opportunities to deliver greater areas of open space, biodiversity and blue/green infrastructure.

- 4.1.10 Our **third concern** is the development strategy's reliance on sites like Cambridge East, NEC, Cambourne and Grange Farm and the uncertainty over the timing and relocation of existing uses or dependencies on uncertain major infrastructure delivery such as East West Rail, the Cambourne to Cambridge guided busway and the Cambridge South-East Transport scheme.
- 4.1.11 In the case of Cambourne and Grange Farm, there is a particular reliance on other consenting processes for transport infrastructure which in itself adds greater risk and uncertainty to the deliverability of the plan. There is also a disagreement at a strategic level as to what the transport solution should be with Major Paul Bristow actively opposing busway schemes in the area in favour of light rail solutions.
- 4.1.12 Cambridge East is a sustainable location but the costs of relocating the Marshall Group's operations has already created uncertainty as to whether an affordable location can be found in a timely way given the housing trajectory relies on first housing completions by 2032. Going by the Lichfields 'Start to Finish' 3rd Edition, a site of this size would need its outline application submitted by now to meet this target.
- 4.1.13 The retained allocation for NEC requires the relocation of the Cambridge Waste Water Treatment Plant (CWTP) to unlock major growth at the site but the need for funding to deliver this remains a major concern and it is highly likely that Anglian Water will not risk further delay and will retain and improve existing operations at the site rather than risk the costly and time consuming process of seeking to relocate.
- 4.1.14 Consequently, there is sufficient evidence to suggest that the aforementioned allocated growth sites could be delayed and, in some circumstances, could become unavailable for development – all of which gives strong indication of a knock-on negative impact on housing and employment land supply. There is little opportunity in the development strategy to plug this gap in supply should it arise or should employment growth be higher than expected (as forecasted by Oxford Economics).

Recommendation: There is a need for a more resilient development strategy with further allocations at strategic growth scale added to the development strategy to improve the pipeline of supply in sustainable and less constrained locations, such as to the east of the subregion, which can better address the imbalance in growth and



prosperity for the area. We also recommend removal of the retained allocation for NEC from the housing trajectory given the serious uncertainty over the funding for the sewerage works relocation.



5 Conclusion

5.1.1 Overall, we recommend that Greater Cambridge adopts a **more ambitious, flexible and resilient development strategy**, planning for higher growth scenarios, recognises the NEC is highly unlikely to be considered deliverable in the plan period and therefore withdrawn as a draft allocation and allocating additional strategic sites such as Six Mile Bottom. Doing so would better reflect the area's economic potential, support the Government's Industrial Strategy, provide a stronger supply pipeline, improve affordability, and ensure the region continues to function as a globally competitive centre for innovation. Our recommendations are as follows:

1. The evidence base and context for the Greater Cambridge Local Plan and its development strategy should give much further attention to the eastern side of the subregion where it is largely silent in terms of recognising the key growth corridors that sit alongside the A14/A11/M11 including the Cambridge to Norwich Tech Corridor and London-Cambridge Innovation Corridor. The potential dualling of the Newmarket line and Cambridge East Transport Strategy are laying the foundations for enhanced access and sustainable travel movements in this direction and locations such as Six Mile Bottom provide huge potential to contribute to the long term economic and housing needs of the area and better address the imbalance in growth and economic opportunities in the subregion.
2. Greater Cambridge should plan for at least Icenis high employment growth scenario, which would necessitate a corresponding uplift in housing delivery to ensure that labour supply, affordability and long-term economic competitiveness are not constrained.
3. The forthcoming stage of evidence must evaluate if the level of need identified by Icenis and the subsequent land allocations are adequate to support Greater Cambridge's global competitiveness and fully seizing emerging opportunities in life sciences, AI, and other innovation-driven sectors. Taking the above into account and recognising the national growth ambitions would ensure that the emerging Local Plan aligns with national policy as stipulated by paragraph 36(d) of the NPPF.
4. There is a need for a more resilient and deliverable development strategy with further allocations at strategic growth scale added to the development strategy to improve the pipeline of supply in sustainable and less constrained locations, such as to the east of the subregion. The strategy is further undermined by the continued inclusion of NEC which requires the relocation of the existing water treatment plant, funding for which is not currently available.



Appendix A Greater Cambridge Growth Scenarios



Greater Cambridge Growth Scenarios

An assessment of the implications of the Oxford Economics growth scenarios on the Local Plan.



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1 Key Points

- Greater Cambridge plays a nationally significant role as highlighted by the UK Government in the UK Industrial Strategy as a core component of the Oxford to Cambridge Growth Corridor, with globally competitive strengths in life sciences, advanced manufacturing, clean energy and digital technologies, anchored by world leading universities and innovation clusters that are central to delivering the Government's long-term economic growth ambitions.
- The Greater Cambridge councils' draft local plan does not plan for the more ambitious levels of economic expansion identified in The Greater Cambridge Growth Scenarios report commissioned by the Ministry of Housing, Communities and Local Government (MHCLG) and forecasted by Oxford Economics.
- The Oxford Economics evidence indicates that significantly higher levels of housing delivery would be required to support these more ambitious growth scenarios, exceeding both the standard method and Icení's central scenario assumptions. Stantec Development Economics consider that this evidence is much more appropriate to the growth potential and corresponding future housing needs of Greater Cambridge.
- ONS Jobs Density data shows that Greater Cambridge has more jobs than resident workers (1.04 jobs per person), meaning it is a net importer of labour due to housing constraints limiting how much of the workforce can live locally. Analysis of homes-to-jobs ratios under the different scenarios demonstrates that this is likely to continue.
- In this context, Greater Cambridge should plan for at least Icení's high employment growth scenario, which would necessitate a corresponding uplift in housing delivery to ensure that labour supply, affordability and long-term economic competitiveness are not constrained.

2 Introduction

This report, written by Stantec Development Economics on behalf of Urban&Civic and Hill Residential, will provide a high-level assessment of the implications of the Greater Cambridge Growth Scenarios work (produced by Oxford Economics) having regard to the approach taken in the Greater Cambridge Employment and Housing Needs Update 2024 – 2045 (produced by IcenI) to forecasting jobs and housing need projections for Greater Cambridge.

The report will follow the below structure:

- Planning Context – discussion of national and local planning policy.
- Forecast Overview – an overview of the findings of the IcenI and Oxford Economics models.
- Methodology Comparison – comparison of the methodologies used by IcenI and Oxford Economics, and implications thereof.
- Conclusions – summing up the above research and analysis.

3 Planning Context

3.1 National Planning Policy Framework (NPPF)

The NPPF provides the Government's framework for the provision of development in a sustainable manner.

There are three overarching objectives of the NPPF: economic, social and environmental (paragraph 8).

The economic objective seeks *'to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity'*.

The social objective supports *'strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering well-designed, beautiful and safe places, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being'*.

At the heart of the NPPF lies a presumption in favour of sustainable development. Plans and decisions should be guided by this presumption, ensuring that sustainable outcomes are prioritised wherever possible.

The NPPF states (paragraph 39) that *'local planning authorities should approach decisions on proposed development in a positive and creative way' and 'work proactively with applicants to secure developments that will improve the economic, social and environmental conditions of the area'*.

Chapter 5, Delivering a sufficient supply of homes, states (paragraph 61) *'to support the Government's objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed'*. Local housing need should be informed by the standard method, which is based on housing stock and affordability ratio – but the NPPF is clear (paragraph 62) that this is a minimum: *'To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning practice guidance.'* Authorities should, therefore, consider planning for higher growth as appropriate – e.g. to reflect economic growth aspirations.

Chapter 6, Building a strong, competitive economy, states (paragraph 85) *'planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development'*.

It goes on to say (paragraph 86) that planning policies should *'set out a clear economic vision and strategy which positively and proactively encourages sustained economic growth, having regard to the national industry strategy and any relevant Local Industrial Strategies and other local policies for economic development and regeneration'*.

3.2 UK Industrial Strategy

The UK's Modern Industrial Strategy (2025)¹ sets out a long-term plan to drive strong, secure, and sustainable economic growth by actively reshaping the country's economic landscape. It responds to global volatility, technological transformation, and the need for national renewal. The strategy aims to make the UK the best place in the world to invest and grow a business, focusing on eight high-growth sectors: Advanced Manufacturing, Clean Energy Industries, Creative Industries, Defence, Digital and Technologies, Financial Services, Life Sciences, and Professional and Business Services.

The strategy identifies city regions and clusters across the UK citing the Oxford to Cambridge Growth Corridor, alongside others, as imperative to collaboration, jobs, businesses, and UK talent. It highlights strengths in life sciences, digital and technologies, advanced manufacturing, and clean energy industries, anchored by two of the best universities in the world, contributing £40 billion to the economy a year. The strategy will support their strengths through funding the Cambridge Growth Company to address the shortage of high-quality research facilities and invest in infrastructure to unlock housing and commercial development.

3.2.1 Life Sciences Sector Plan

The UK Life Sciences Sector Plan sets out a long-term strategy to cement the UK's position as a global leader in health innovation and economic growth, aiming to be the leading life sciences economy in Europe by 2030 and third globally by 2035. It is structured around three interlinked pillars:

- Strengthening world-class research and development through increased investment, improved clinical trial delivery and better use of health data.
- Making the UK a more attractive place to start, grow and invest in life sciences businesses by unlocking capital, developing skills, attracting global talent and addressing structural barriers such as planning delays.
- Accelerating the adoption of innovation within the NHS through streamlined regulation, appraisal processes, and procurement.

Together, the plan seeks to provide greater coherence and certainty, enabling scientific discoveries to translate more quickly into economic value and patient benefit.

3.2.2 Advanced Manufacturing Sector Plan

The UK Government's Advanced Manufacturing Sector Plan sets out a long-term ambition for the UK to become a global leader in advanced manufacturing by 2035, recognising the opportunities created by decarbonisation, digitalisation and the drive for economic resilience. The strategy focuses on boosting productivity and nearly doubling annual business investment, reforming the business environment to reduce barriers, scaling innovation and automation, developing a digitally skilled workforce, and supporting regional manufacturing clusters.

¹ UK Industrial Strategy (December 2025)

It prioritises six high-growth sectors – automotive, batteries, aerospace, space, advanced materials, and agri-tech – supported through targeted R&D funding, regulatory reform, improved energy affordability, access to finance and skills programmes. Overall, the plan aims to deliver high-quality jobs, strengthen supply chains and build a more competitive, sustainable and regionally balanced manufacturing economy.

3.2.3 Clean Energy Sector Plan

The UK Government’s Clean Energy Industries Sector Plan outlines a strategy to position the UK as a global leader in clean energy by 2035, with a commitment to more than double annual investment to over £30 billion and support the creation of hundreds of thousands of high-quality jobs. It focuses on six high-growth frontier industries, including wind, nuclear, hydrogen, CCUS and heat pumps, building on the UK’s strengths in renewable deployment, manufacturing capability, skilled labour and innovation.

Delivery is structured around providing long-term policy certainty, targeted public investment, removal of barriers such as high energy costs and planning delays, and the development of a skilled and inclusive workforce. Collectively, the plan aims to deliver a secure, affordable and low-carbon energy system while driving sustained economic growth and global competitiveness.

3.3 Greater Cambridge Planning Policy and Plan Making

Cambridge City Council and South Cambridgeshire District Council have a history of joint working for plan making, evident in their previous plans², and the preparation and content of their current plans (adopted in Autumn 2018) – for example the preparation of a SHMA covering the seven districts of the Cambridge housing sub-region in 2013³.

The Cambridge Local Plan was adopted 18th October 2018 and the South Cambridgeshire Local Plan adopted 27th September 2018, having both been submitted for examination in 2014. Preparation of a new Joint Local Plan for Cambridge and South Cambridgeshire (“Greater Cambridge”) commenced in 2020. The Greater Cambridge Draft Local Plan (Regulation 18) has been published for public consultation, commencing December 2025.

3.3.1 Current Standard Method

Given these Local Plans are over five years old, the standard method takes precedence. For Cambridge, it is 1,103 homes per annum and 1,193 homes per annum for South Cambridgeshire, totalling 2,296 over Greater Cambridge.

As discussed above, the standard method indicates the *minimum* of number of homes a local authority should build; it is therefore only the starting point. In the case of Greater Cambridge, a higher figure could seek to reflect economic growth aspirations.

² Adopted 2006 and 2007 respectively, following a review period that commenced in the early 2000s.

³ Strategic Housing Market Assessment for the Cambridge housing sub-region, May 2013.

3.3.2 Draft Greater Cambridge Local Plan 2024 to 2045

The draft Local Plan for Consultation (Regulation 18) was published in October 2025 for scrutiny by Councillors. On 25th November 2025, Cabinet agreed the Draft Local Plan.⁴

In the introductory section to the draft Local Plan, the spatial portrait describes the area's economy as follows, noting its position as an internationally significant economic hub owing to knowledge intensive sectors and life sciences.

Greater Cambridge is home to an internationally significant and well-established network of employment clusters, particularly in life sciences, information technology and advanced manufacturing, supported by two major universities. These knowledge intensive clusters play a pivotal role in sustaining Greater Cambridge's economic momentum and comprise some of the fastest-growing industry sectors in the UK. They have seen remarkable growth, with employment increasing by 3.0% between 2018 and 2024, more than double the 1.3% growth rate for these sectors seen across Great Britain. In the 2025 Global Innovation Index, Cambridge was ranked the second most intense innovation cluster globally.

The Draft Local Plan's Development Strategy introduces a vision for Greater Cambridge. In summary, it is a vision to cut environmental impact while driving innovation and inclusive growth. Seven strategic priorities flow from this vision, including 'Jobs', which encapsulates the Draft Local Plan's economic goals:

Encourage a flourishing, dynamic and mixed economy in Greater Cambridge which includes a wide range of jobs, while maintaining our area's global reputation for education, research and innovation.⁵

The Homes section of the draft Local Plan highlights the strategic priorities of house building in Greater Cambridge:

We want our local plan to deliver high-quality, affordable housing in the right places. The Housing Strategy sets out our high-level approach to tackling these challenges, including through the building of a new generation of council homes, promoting the development of affordable homes and the delivery of a co-ordinated effort to reduce homelessness. It has guided our policies in this local plan.

3.3.2.1 Policy S/JH: New jobs and homes

Policy S/JH⁶ articulates the areas objectively assessed needs for homes, jobs and employment land over the plan period. The number of additional jobs to support the Greater Cambridge economy is set at 73,300 jobs with 48,195 homes to facilitate this new employment (2,410 homes per annum). The rationale for this is set out in the Greater Cambridge Employment and Housing Evidence Update (2025)⁷.

⁴ Subject to proposed modifications that do not directly impact upon the issues discussed in this report.

⁵ dGCLP (December 2025), Section 2 Development Strategy, page 47, paragraph 2.4, final bullet.

⁶ dGCLP (December 2025) Section 2 Development Strategy

⁷ Greater Cambridge Employment and Housing Evidence Update (2025)

3.3.2.2 Policy S/DS: Development strategy

Policy S/DS⁸ establishes where the development needs identified in S/JH should be provided. There are currently five strategic new housing site allocations in the Local Plan: this includes Cambourne North (13,000 homes, 2,550 in the plan period 2024-2045), Land Adjacent to A11 and A1307 at Grange Farm (6,000 homes, 2,550 in the plan period), Cambridge East (8,000 homes, 3,950 in the plan period), North East Cambridge (7,925 homes, 3,950 in the plan period) and Cambridge Biomedical Campus (1,000 homes, all in the plan period). The Site at Six Mile Bottom is not allocated under the current draft Local Plan, however it has the potential to provide 8,500 or more (approximately 2,550 during the plan period) new homes to Greater Cambridge.

⁸ dGCLP (December 2025) Section 2 Development Strategy



4 Forecast Overview

The three economic growth scenarios this report will explore are: the baseline position informed by the draft local plan and standard method; the IcenI housing need position; and the Oxford Economics growth scenarios. These forecasts provide population, housing and jobs projects based on varying economic growth forecasts.

4.1 Baseline Forecast Scenario

The baseline housing need position in the draft Greater Cambridge Local Plan equates to 2,410 homes per annum based on an assumption of 73,300 additional jobs in Greater Cambridge⁹; this amounts to 48,195 homes over the plan period.

The current standard method position for Greater Cambridge is 2,296 homes per annum with 1,103 homes per annum needed in Cambridge and 1,193 homes needed in South Cambridgeshire¹⁰. This is slightly less than the figure quoted in the draft local plan, however the standard method is subject to slight changes as affordability ratios and housing stock statistics are updated.

4.2 IcenI Scenarios

The IcenI Greater Cambridge Employment and Housing Needs Update 2024 to 2025¹¹ produces a range of job outcomes, with their preferred central scenario estimating 73,000 jobs will be created up until 2045. They estimate that 2,292 homes per annum would be required to support this growth. This is closely aligned to the standard method which shows a need for 2,296 homes per annum (45,900 homes over the 20-year period). IcenI's preferred scenario is the central scenario as it builds on an assumption that there will be slowing or contracting periods over the period and makes allowances for unforeseen shocks¹².

Table 4-1 shows IcenI's projected housing need for the range of job growth forecasts for Greater Cambridge between 2024 and 2045. The range of dwellings per annum varies from 2,150 to 2,829 dwellings per annum depending on the scenario, with the high scenario presenting the highest number of dwellings per annum.

There is a difference between households and dwellings owing to vacancies making the number of dwellings required slightly higher. 7.5% of the need is added to reflect the expectation that a level of vacancy is necessary in stock to allow for choice and churn.

⁹ Policy S/JH: New jobs and homes

¹⁰ Subject to rounding.

¹¹ Greater Cambridge Employment and Housing Needs Update 2024-2025 (September 2025)

¹² Greater Cambridge Local Plan Strategy Topic Paper (December 2025 – January 2026)



Table 4-1: Iceni projected housing need (2024 – 2045)

Housing need	Households 2024	Households 2045	Change in households	Per annum	Dwellings (per annum)
Central	124,775	171,509	46,733	2,225	2,292
Central Sensitivity	124,775	168,618	43,842	2,088	2,150
High	124,775	182,462	57,687	2,747	2,829
High Sensitivity	124,775	179,300	54,524	2,596	2,674
Standard method					2,295

Source: Iceni 2025

Using the central scenario from the Iceni report would have negligible change on the housing need position set out in the draft local plan and aligns to the current standard method for Greater Cambridge; however, the high and high sensitivity scenarios would increase housing need over the period to 2045 by an additional 379 to 534 dwellings per annum or 7,580 to 10,680 over the period through to 2045.

Sensitivity scenarios are a more conservative estimate of growth as they do not extend the time periods for the high growth rates and the gradual return in growth rates from higher 10 year to the 20-year mean, unlike the Central and High scenarios.

4.3 Oxford Economics Scenarios

The ‘Greater Cambridge: Growth Scenarios Report’¹³ commissioned by the Ministry of Housing, Communities and Local Government (MHCLG) from Oxford Economics anticipates more ambitious levels of growth in Greater Cambridge owing to the knowledge intensive sectors and life sciences sectors as highlighted in the UK Industrial Strategy. As a result, Oxford Economics considers much higher levels of housing delivery to support jobs and economic growth in Greater Cambridge.

The Oxford Economics report sets out three growth scenarios, low, medium and high, based on their Local Authority District (LAD) Forecasting Model and previous work in ‘The Case for Cambridge Report’¹⁴ undertaken by the previous Government in March 2024.

Table 4-2 illustrates the jobs and housing projections for Greater Cambridge for the three scenarios and the baseline, which assumes demographic and economic conditions continue on the same trend.

Table 4-2: Oxford Economics Projected Growth in Jobs and Houses 2023 to 2050

Oxford Economics	Growth in Jobs	Growth in Jobs per annum	Growth in Houses	Growth in Houses (per annum)
Baseline	85,000	3,148	40,000	2,070
Low	144,000	5,333	100,000	3,704
Medium	186,000	6,889	125,000	4,530
High	229,000	8,481	150,000	5,600

Source: Oxford Economics 2025

¹³ Greater Cambridge: Growth Scenarios (November 2025)

¹⁴ The Case for Cambridge (March 2024)



These scenarios show that even in the low growth scenario for Greater Cambridge there will be 144,000 additional jobs over the period through to 2050 equating to 5,333 new jobs per annum. This is supported by 100,000 additional homes, equating to 3,704 homes per annum. This is higher than Icení's high scenario (2,829 dwellings per annum) and significantly higher than the standard method position (2,295 dwellings per annum).

In the Oxford Economic high growth scenario, a housing requirement of 150,000 homes (5,600 per annum) would be required to facilitate an additional 229,000 jobs (8,481 per annum) across Greater Cambridge.

These scenarios result in population growth of 1.7% to 2.6% per year (0.8% baseline) to around 507,000 to 630,000 by 2050. This is in light of the current population which is 319,000. The baseline position would result in a population of 400,000 by 2050.

These scenarios highlight the growth potential of Greater Cambridge's economy and population; however, this is over and above what the Greater Cambridge councils are planning for in their draft Local Plan using the standard method. To achieve these more ambitious levels of employment growth, the councils should be planning accordingly in terms of their housing numbers.

4.4 Discussion and Conclusion

The Icení and Oxford Economics evidence demonstrates divergence between the level of growth currently being planned for in the draft Greater Cambridge Local Plan and the scale of growth that could be realistically supported by the area's economy highlighted by the MHCLG.

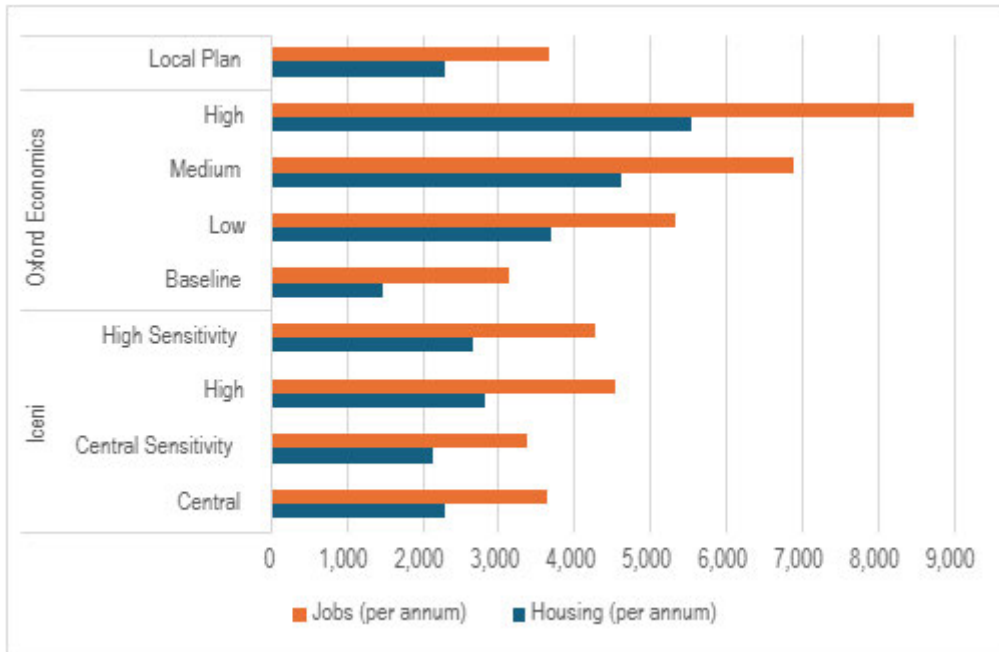
The baseline and standard method positions, alongside Icení's central scenario, are closely aligned with housing need reflecting around 2,300 homes per annum linked to jobs growth of approximately 73,000 jobs up to 2045. Whilst this provides consistency between employment and housing provision, it represents a modest growth trajectory.

In contrast, the Oxford Economics evidence points to substantially higher levels of job creation driven by knowledge intensive and life science sectors, with even the low growth scenario requiring 3,700 homes per annum and the high growth scenario requiring 5,600 homes per annum to support between 144,000 and 229,000 additional jobs. These figures far exceed both the standard method and Icení's central scenario and indicate greater population growth.

Taken together, the evidence suggests that the Council's current approach risks constraining economic potential in Greater Cambridge. A more ambitious strategy, aligned with Oxford Economics' forecasts, would better reflect Greater Cambridge's growth prospects and necessitate higher housing targets to ensure that labour supply, affordability and economic growth are not undermined.

Figure 4-1 provides an overview of the growth scenarios in Greater Cambridge.

Figure 4-1: Comparison of growth scenarios in Greater Cambridge



Source: Standard Method, IcenI and Oxford Economics 2025

5 Methodology Comparison

The methodologies used by the varying scenarios and forecasts differ. Icení's method is demography and labour-supply-led, focusing on how population growth constrains or enables job growth (and housing need), whereas Oxford Economics' approach is economy- and sector-led, focusing on how structural economic change and housing-enabled population growth drive employment, productivity and GVA outcomes.

5.1 Methodology Overview

5.1.1 Icení

Icení's approach in the Greater Cambridge Employment and Housing Needs Update 2024 to 2025¹⁵ starts from residential labour supply and population growth. It estimates growth in the economically active population using demographic projections, informed by OBR activity rates, then converts this into jobs supported by adjusting for commuting patterns¹⁶, double jobbing (where people have more than one job), and unemployment.

This methodology is also run in reverse to derive economic led housing need, starting from job growth, flexing migration to meet labour demand, and translating population growth into households and dwellings using household formation rates and vacancy assumptions. The job growth assumptions are similar to those in the EHEU¹⁷, starting with baseline forecasts from Cambridge Econometrics and making sector specific adjustments¹⁸.

5.1.2 Oxford Economics

The Oxford Economics evidence present a more ambitious outlook for Greater Cambridge, recognising its strong economy, growth potential, and policy support for growth as highlighted by the UK Industrial Strategy. The methodology is economy-led, building up forecasts from long-run historical employment trends (1991 – 2023) in knowledge-intensive and high-tech sectors, projected forward to 2050:

'The growth scenarios represent faster employment growth (1.8% to 2.5% per year) than observed historically (1.7% per year). The increase in employment would be primarily driven by knowledge intensive sectors, which would form around two-thirds of additional employment across the three growth scenarios.'

Sectoral productivity assumptions are applied to estimate GVA impacts. These projections feed into Oxford Economics' Local Economic Forecasting Model, combining national macroeconomic and demographic baselines with scenarios for additional jobs growth, including the impacts of indirect/supply chain activity and economic activity arising as a result of additional population.

¹⁵ Greater Cambridge Employment and Housing Needs Update 2024-2025 (September 2025)

¹⁶ Using the 2011 Census as the 2021 Census is affected by the Covid-19 Pandemic.

¹⁷ 2023 Greater Cambridge Employment and Housing Evidence Update Employment Land, Economic Development and Relationship with Housing

¹⁸ Detailed in paragraphs 3.5-3.8.

Housing delivery is translated into population and spending effects, accounting for higher incomes, partial local capture of demand, and indirect and supply chain impacts with low (100,000 dwellings), medium (125,000) and high (150,000) housing scenarios and a baseline (40,000) up to 2050.

Oxford Economics' low-growth scenario still anticipates job creation well above current plans, supported by higher housing growth, with medium and high scenarios projecting even greater expansion.

Whilst the Oxford Economics scenarios are ambitious and reflect higher growth than past trends, they also recognise the extraordinary growth potential of the area and the implications of the Industrial Strategy and impetus to boost economic growth, especially in key sectors for the area. Faster housing growth has the potential to support this stronger economic expansion.

5.2 Relationship between Jobs and Homes

A low homes-per-job ratio indicates that there are fewer homes available (or being provided) relative to the number of jobs, which in turn implies a reliance on in-commuting (or high numbers of workers per household) to meet labour demand. This is consistent with Greater Cambridge's role as an economic and employment hub underpinned by knowledge intensive sectors and life sciences. Such areas typically attract workers from a wider catchment, resulting in elevated levels of commuting and pressure on transport infrastructure, alongside increased competition for housing and affordability pressures.

The current homes-per-job ratio is significantly lower in Greater Cambridge (0.61) when compared to England (0.90)¹⁹. The ratio of *additional* homes to jobs under the IcenI central scenario is 0.63. Under the low Oxford Economics scenario this is 0.69. The other scenarios for each report produce similar ratios. Table 5-1 summarises job ratios under the different scenarios. Therefore, any of these scenarios (including the local plan) would slightly uplift the ratio in Greater Cambridge but largely maintain existing patterns.

Table 5-1: Summary of Homes to Job Ratios

		Additional Homes	Additional Jobs	Homes/jobs ratio
IcenI	Central	45,840	73,000	0.63
	High	56,580	90,936	0.62
Oxford Economics	Low	100,000	144,000	0.69
	Medium	125,000	186,000	0.67
	High	150,000	229,000	0.66
Local Plan		48,200	73,300	0.66
Current Totals	England	24,927,591	28,412,000	0.90
	Greater Cambridge	125,884	206,000	0.61

Source: BRES, 2021 Census, IcenI, Oxford Economics 2025

Commuting patterns reinforce this interpretation. The 2011 Census suggests 82% live and work in Greater Cambridge and the 2021 Census suggests 87% live and work in Greater Cambridge, however the 2021 figure is influenced heavily by residents working from home during the Covid-19 pandemic. This indicates a strong internal labour market, but the scale of employment relative to housing means

¹⁹ 2021 Dwellings Data and BRES data for employment.

that the area also experiences in-commuting from surrounding local authorities. ONS Jobs Density data suggests there is 1.04 jobs per person in Greater Cambridge²⁰ meaning Greater Cambridge functions as a net importer of labour, reflecting the limited capacity of the existing housing stock to accommodate the workforce required by the local economy. This appears likely to continue under any of the scenarios.

²⁰ ONS Jobs Density (2023) from NOMIS



6 Conclusion

This report has assessed the implications of adopting alternative economic growth scenarios for Greater Cambridge, with reference to the differing approaches and outcomes of the Icení Employment and Housing Needs Update and the Oxford Economics Growth Scenarios.

The analysis demonstrates that the draft Greater Cambridge Local Plan and the standard method are aligned with Icení's preferred central scenario, collectively suggesting a housing requirement of around 2,300 homes per annum linked to jobs growth of 73,000 jobs up to 2045. This approach is methodologically consistent using a demography and labour-supply-led methodology and baseline economic forecasts (with adjustments), however it reflects a cautious and relatively constrained growth assumption that does not fully capture Greater Cambridge's economic potential as highlighted by the Government in the UK Industrial Strategy.

In contrast, the Oxford Economics evidence presents a more ambitious outlook, using an economy and sector-led methodology based on Greater Cambridge's established strengths and recent trend growth in knowledge intensive sectors like life sciences (with faster growth in these sectors driving overall economic and employment growth). Even under its low growth scenario, Oxford Economics identifies a significantly higher level of job creation than that currently planned for, supported by much higher housing growth – which could be a crucial driver of growth in an area with exceptionally high housing costs. Medium and high scenarios point to even higher growth. When considered alongside national planning policy, the UK Industrial Strategy and sector-specific growth plans, the Oxford Economics scenarios appear more closely aligned with the Government's wider economic ambitions for Greater Cambridge and its role within the Oxford-Cambridge Growth Corridor.

The low homes per-job-ratios under both scenarios point to an ongoing imbalance between housing provision and employment growth in Greater Cambridge, reflecting that high levels of in-commuting are expected to continue even in highly ambitious growth scenarios.

Taken together, the evidence suggests that the current Greater Cambridge growth strategy, while consistent with standard method requirements, risks undermining future demand for housing and labour, and in doing so, may constrain Greater Cambridge's ability to accommodate and capitalise on the Government's ambitions for Greater Cambridge's economic expansion and the imperative role it plays within knowledge intensive sectors and life sciences. A more ambitious growth framework, informed by Oxford Economics for MHCLG, would better reflect the national policy direction and the area's globally competitive economic role. This would require higher housing targets, at least in line with the Icení high growth scenario, to ensure economic growth, labour supply, affordability and long-term competitiveness are effectively supported.

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