



Examination into the Soundness of the
Cambridge Local Plan and
South Cambridgeshire Local Plan

Joint Matter 4 – Employment and Retail

Joint Matter Statement by
Cambridge City Council and
South Cambridgeshire District Council

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List of Abbreviations

AAP	Area Action Plan
EEFM	East of England Forecasting Model
ELR	Employment Land Review
FTE	Full Time Equivalent
ha	hectares
HMA	Housing Market Area
HQ	Headquarters
LEFM	Local Economy Forecasting Model
R&D	Research and Development
SHMA	Strategic Housing Market Assessment
The technical report	Population, Housing and Employment Forecasts Technical Report (RD/Strat/080)

Introduction

1. This statement sets out both Councils' response to the Inspector's Matters 4a. to 4d. regarding employment and retail.
2. All the documents referred to in this statement are listed at Appendix 1; and examination document reference numbers are used throughout for convenience.

Matter 4a: Is the forecast growth of net additional jobs (22,100 for Cambridge City and 22,000 for South Cambridgeshire District) based on a clear understanding of business need and a robust evidence base?

3. The Councils are supportive of the success of the Cambridge area's economy, and anticipate continued economic growth during the Plan period. In accordance with the NPPF¹, the Plans make provision for the scale and type of jobs needed in the area, and support sustainable economic growth.
4. Section 3 of the Joint Working and Development Strategy Topic Paper² sets out how the Councils arrived at the objectively assessed need for homes and jobs in the SHMA³. This shared methodology for homes and jobs ensures a clear and robust link between the forecast increase in homes and jobs across the housing market area (HMA) which is also a functional economic area.
5. The methodology considered the anticipated increase in population across the HMA having regard to national, local and economic forecasts to ensure the most reliable assessment of future needs. This approach considered projected jobs generation. This is particularly important as a significant proportion of housing growth is to support the growing economy. The forecasts were adjusted to account for the 2011 Census, ensuring an accurate population baseline to forecast future housing and jobs needs. From the 11 sources of forecasts considered, an indicative figure was identified, where there was a convergence of a number of forecasts. By considering all of the forecasts together, each district's indicative population figure was determined, encapsulating within a single figure, the overall outlook for population in 2031 for each district in the HMA taking account of the economic growth forecasts.
6. The identified population figures were then run through the East of England Forecasting Model⁴ (EEFM) to identify the resulting increase in jobs and homes. For employment policy purposes, the EEFM is considered alongside the Local Economy Forecasting Model⁵ (LEFM) to provide a balanced and robust approach to modelling employment growth. These forecasting models are widely used; and both are included

¹ RD/NP/010

² Joint Working and Development Strategy Topic Paper (RD/Top/010) pages 5 to 7

³ RD/Strat/090

⁴ Developed by Oxford Economics, an established and reputable company involved in forecasting and quantitative analysis <http://www.oxfordeconomics.com/>

⁵ Developed by Cambridge Econometrics, an established and reputable company involved in economic modelling and data analysis <http://www.camecon.com/Home.aspx>

in HM Treasury's monthly comparison of independent forecasts for the UK economy⁶. The different models do not have any significantly different strategy implications for the Plans. The response on matter 4c gives further information on how the decision to use different models was arrived at.

7. The number of jobs to be planned for is 22,100 in the Cambridge Local Plan⁷ and 22,000 in the South Cambridgeshire Local Plan⁸, or 44,100 across both districts. This fully meets the objectively assessed needs for jobs.
8. Using the EEFM ensures that an integrated approach has been taken to population, housing and jobs forecasts. The plans propose a significant boost to housing as referred to in Matter 3a. The relationship between jobs and houses is reflected in the proper functioning of the HMA as a whole.
9. The Councils are planning to ensure that the land is available to accommodate these jobs in order to continue to support the successful Greater Cambridge⁹ economy. However, the Councils have less control over the creation of jobs than they do over the provision of housing. Changes to the economy at a national or international level, or changes to local factors could mean that job growth rates are different from the projections. The Plans are flexible enough to deal with changing circumstances. In addition, monitoring will continue. A joint Plan review is already committed as part of the City Deal, scheduled to start by 2019. The success of the Greater Cambridge economy is underpinned by the high quality of life and place that makes Cambridge and South Cambridgeshire attractive places to live and work.
10. At the Issues and Options stage in 2012, the Councils consulted on a number of options for different levels of job growth¹⁰. Following consultation, these options were reviewed along with consideration of the work undertaken in the Population, Housing and Employment Forecasts Technical Report¹¹ and the SHMA¹² for the wider Cambridge sub-region HMA. The Councils decided that the figures included in the SHMA represented the objectively assessed need for new jobs and were appropriate targets. As there was variation between different forecasts in Cambridge, it was prudent to base the target on the higher forecast that was more clearly linked with housing provision across the HMA. For South Cambridgeshire, there was no significant difference between the forecasts and the medium growth option, hence the same jobs figure was chosen.
11. Some representations consider that the identified jobs growth is too low, and does not reflect past growth rates. However, the planned jobs growth is actually similar to that

⁶ <https://www.gov.uk/government/collections/data-forecasts>

⁷ Policy 2 of Cambridge Local Plan 2014: Proposed Submission (RD/Sub/C/010)

⁸ Policy S/5 of the Proposed Submission South Cambridgeshire Local Plan (RD/Sub/SC/010)

⁹ Greater Cambridge is the term now embodied in the City Deal signed with Government for Cambridge and South Cambridgeshire, Greater Cambridge City Deal, page 7 (RD/Strat/300)

¹⁰ Cambridge Local Plan Issues and Options Report Options 6, 7 and 8, pages 42-43 (RD/LP/240) and South Cambridgeshire Local Plan Issues and Options Report Issue 3, page 19 (RD/LP/030).

¹¹ RD/Strat/080. Hereafter known as "the Technical Report"

¹² RD/Strat/090.

achieved in the past twenty years, a period of significant growth in the high-tech clusters. Job growth across both districts between 1991 and 2011 was 42,100 (11,700 in Cambridge and 30,400 in South Cambridgeshire)¹³. Furthermore, the land and floorspace needs identified in the Submission Plans result in a higher combined target than a comparison with average annual net take up rates from the last ten years¹⁴.

12. For Cambridge and South Cambridgeshire, these jobs were then translated into land/floorspace in the Councils' Employment Land Reviews (ELR)¹⁵. The ELR 2012¹⁶ was informed by a review of the commercial property market by Savills. This review examined how different property market areas functioned, cross checked local authority data and Savills' own economic data, and involved interviews with businesses and other stakeholders. Furthermore, the ELR 2012 analysed the state and prospects of Cambridge and South Cambridgeshire's economy. This qualitative analysis of market signals supported the forecasting work as an accurate representation of future needs¹⁷.
13. The wide range of forecasts used and the detailed testing and analysis carried out means that the jobs figures in the SHMA¹⁸ are based on a clear understanding of business need and a robust evidence base.
14. In the past, the Councils have operated a policy of selective management of the economy, whereby newly developed employment land in the districts was reserved for businesses that supported the Cambridge Cluster or supported the local economy. This was because employment land (particularly in Cambridge) was scarce. Given the Cambridge Cluster is of national and international significance, ensuring there is sufficient land to support it is crucial. The Local Plans do not continue the policy of selective management of the economy as the supply of employment land, particularly land for research and development has improved, and the maturing of the high-tech clusters means that flexibility to accommodate other uses which compliment R&D is needed. Furthermore, the complexity of the policy was found to be deterring some forms of investment^{19 20}. The policy has successfully protected and nurtured the Cambridge Cluster through the development stage and now as it matures and evolves, the cluster is considered more robust and self-sustaining. There is no evidence that removing this policy will lead to increased job growth, but the Councils will continue to monitor any impacts.

¹³ <http://www.cambridgeshireinsight.org.uk/EEFM> 2012 data by area, Cambridge and South Cambridgeshire tabs

¹⁴ See Appendix 5, page 26 of this statement

¹⁵ See Matter 4c. for more detail, page 7

¹⁶ RD/E/020

¹⁷ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) High Level Conclusions, paragraph 4.20

¹⁸ RD/Strat/090

¹⁹ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 5.5, page 42-43

²⁰ Cambridge Cluster at 50 Report (RD/E/060), Agenda for Action, Page 33 Bullets in the Property / Planning Section

15. One criticism levelled at the Councils is questioning how the trend-based forecasts that inform the SHMA deal with large “one-off” business moves. For example, AstraZeneca are planning on relocating their HQ to Cambridge Biomedical Campus/Addenbrooke’s. This is primarily from their site at Alderley Park, Cheshire but also includes some functions moving from Granta Park in South Cambridgeshire. This new site will host 2,000 staff (550 having moved from Granta Park)²¹. It is argued that economic forecasts are unable to account for the relocation of large businesses, and consequently AstraZeneca’s move adds to the number of jobs (and homes) required in the area.
16. The Councils contend that the modelling work must to some extent account for some businesses’ large-scale relocations. The models are based on past trends, which include previous large-scale moves/relocations of businesses²². The degree to which they account for this, depends on how much the relocation of large businesses over the plan period differs from the past. One large-scale relocation, which involves some of the workers relocating within the HMA, is not sufficient to completely discount the modelling work that informs the SHMA. That said, the Councils recognise that AstraZeneca is a large firm, which could attract other bioscience businesses to the area. Careful and ongoing monitoring of the Plans will be able to determine if the forecasts turn out to be significantly different and a review of the Plans is already timetabled. Furthermore, the modelling work does identify high growth in the high-tech sector.
17. A further criticism is that the Councils are relying upon out of date forecasts. New forecasts are released at regular intervals, and it would be procedurally impossible to take account of the most up to date forecasts at the time of adoption (due to consultation and examination requirements). The Plan is based on a sound evidence base from the information available during its formulation. Furthermore, the EEFM 2013 forecasts were not significantly different from those used to identify the homes and jobs targets²³ (job targets for Cambridge and South Cambridgeshire: 44,100; EEFM 2013 job projections for Cambridge and South Cambridgeshire: 40,300).
18. It has been put to the Councils that they are not doing enough to support high-tech manufacturing. The overall trend anticipated is for a loss of industry and manufacturing uses²⁴. This has been reflected by recent history, and the two Plans identify a number of underused industrial sites for alternative uses. Both Plans seek to protect employment and industrial sites to maintain the land supply for future uses. The Councils’ evidence base also notes that the redevelopment of manufacturing sites for employment uses is often unviable²⁵. The Councils’ are mindful of the demand for high-tech manufacturing alongside R&D and the altered approach to the policy of

²¹ <http://www.astrazeneca.co.uk/astrazeneca-in-uk/our-uk-sites/cambridge>

²² For example the Wellcome Trust (900 employees) and Cancer Research UK (500 employees)

²³ <http://www.cambridgeshireinsight.org.uk/EEFM> 2012 and 2013 data by area, Cambridge and South Cambridgeshire tabs

²⁴ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) table 2-7, page 11

²⁵ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 4, page ii

selective management of the economy, and how employment sites are protected, specifically aims to encourage the development of hybrid buildings, which incorporate offices and manufacturing and are more viable to develop.

19. In summary, the Councils have a clear understanding of business needs in the Cambridge area during the plan period, and the forecast growth of net additional jobs is a robust basis for plan making.

Matter 4b: Does the evidence base supporting employment and retail policies meet the requirements of Planning Practice Guidance?

20. The NPPG provides guidance on assessing employment and retail needs and employment and retail land supply, sources of information that should be considered and the outputs.
21. The Councils consider that the evidence base that has supported plan making appropriately considers the range of factors outlined in the NPPG. The Councils have prepared a document to signpost where the guidance of the NPPG regarding employment and retail needs has been addressed by the Councils through the plan making process. See: Cambridge and South Cambridgeshire Local Plan - Consideration of the National Planning Policy Guidance with respect of Employment and Retail (RD/Strat/380).
22. On employment, the ELR Update 2012 (RD/E/020) and ELR Update 2013 (RD/E/030) identify the land and floorspace required for employment development over the Plan period for both districts. It also analyses and discusses the qualitative needs for new employment development over the plan period, using a range of sources on information. It considers the sites available to meet needs, and gaps that need to be addressed. The Cambridge Cluster at 50 (RD/E/060), commissioned by EEDA, also informed the plans.
23. The Cambridge Retail and Leisure Update 2013 (RD/E/130) incorporates a comprehensive up-to-date review of retailing and leisure needs in the City with a particular emphasis on Cambridge City Centre. It identifies the floorspace required for retail and leisure development over the plan period for Cambridge and analyses and discusses the qualitative needs for new employment development over the plan period. A range of information sources were utilised, which reflects the advice in the NPPG.
24. The City Centre Capacity Study examines the capacity of Cambridge City Centre to meet the needs of the district and the wider sub-region in the period to 2031.

Matter 4c: Will the proposed amounts of land for economic development uses meet the needs for all foreseeable types of economic development?

25. The Councils consider that the proposed amounts of land for economic development in the Plans will meet the need for all foreseeable types of economic development. This matter has been addressed in the Council's joint Topic Paper on Employment²⁶.
26. The Plans identify the need for employment land as being 7.4ha for Cambridge²⁷ and around 143,000m² of additional floorspace or 43ha for South Cambridgeshire²⁸.
27. There are a number of assumptions built into the ELR updates' translation of the forecasts into land and floorspace requirements²⁹, the Councils Topic Paper on Employment gives further detail on these assumptions³⁰. They provide a reasonable guide for plan making. The Councils have made provision to meet the full land and floorspace needs, in order that conditions in Greater Cambridge are conducive to businesses.
28. The Councils have been challenged on the use of different models in the ELR to identify land requirements. The different models (EEFM and LEFM) do not have any fundamentally different strategy implications for the Plans and the Councils' reliance on different models does not represent a failure to meet the Duty to Co-operate. If the assumptions in the ELR 2013 update³¹ were applied to South Cambridgeshire, using the adjusted EEFM forecast used in the SHMA³², this would increase the employment land need from 43ha to 48.9ha. It would show a higher proportion of new jobs in R&D, and less in offices; with greater loss of industry, and a higher amount of storage and wholesale. For comparison, this has been included in Appendix 3. The land supply identified would continue to meet these needs.
29. The assumptions that underpin the ELR Updates 2012 and 2013 are reasonable and robust. The methodology was the same as that used in the ELR 2008, and was updated where appropriate. Further detail is set out in Appendix 4.
30. Both Plans identify a range of strategic sites that will make a significant contribution to future employment provision, in addition to the significant land supply with planning permission. These are listed below. Further information can be found in the Joint Employment Topic Paper³³:

²⁶ RD/Top/020, paragraphs 1.12 – 1.21.

²⁷ See Paragraph 5.6 and Table 5.1 of the Cambridge Local Plan 2014: Proposed Submission (RD/Sub/C/010).

²⁸ See Paragraph 2.36 of the Proposed Submission South Cambridgeshire Local Plan (RD/Sub/SC/010).

²⁹ Both ELR 2012 update (RD/E/020) chapter 2 and ELR 2013 update (RD/E/030)

³⁰ RD/Top/020, paragraphs 1.12 – 1.21.

³¹ RD/E/030

³² RD/Strat/090

³³ Paragraphs 1.26-1.30 of RD/Top/020

Cambridge:

- Station Area West and Clifton Road³⁴;
- West Cambridge³⁵;
- Cambridge Biomedical Campus (including Addenbrooke's Hospital)³⁶; and
- Land adjoining Peterhouse Technology Park³⁷.

Joint sites

- North West Cambridge³⁸; and
- Cambridge Northern Fringe East³⁹.

South Cambridgeshire:

- Northstowe⁴⁰;
- Cambridge Science Park⁴¹;
- Land adjoining Peterhouse Technology Park⁴²;
- Waterbeach New Town⁴³;
- Bourn Airfield New Village⁴⁴; and
- Cambourne West⁴⁵.

31. The Local Plans identify a healthy supply of land when considered against the employment land needs identified:

- Table 5.3 in Cambridge's Local Plan⁴⁶ identifies the net employment land supply at March 2012 of 12 ha, compared with an identified need for 7.4 ha.
- South Cambridgeshire's Local Plan⁴⁷ establishes the existing supply of land available in the district. The Joint Topic Paper on Employment (RD/Top/020) reported the latest land supply situation from the Annual Monitoring Report (RD/AD/270). It identified an overall land net supply of 123 ha.

32. An updated position is included in Appendix 5; this reflects monitoring data that was published last year in the Councils' AMRs. This details the sites which make up the land and floorspace supply figures. It includes updated information from planning major permissions granted in 2013/14, and takes account of planned losses as a result of the Plans and existing planning consents.

³⁴ Policy 20, RD/Sub/C/010

³⁵ Policy 18, RD/Sub/C/010

³⁶ Policy 16, RD/Sub/C/010

³⁷ Policy 26 and allocations GB3 and GB4 in Appendix B, RD/Sub/C/010

³⁸ North West Cambridge Area Action Plan (RD/AD/290)

³⁹ Policy 14, RD/Sub/C/010 and Policy SS/4, RD/Sub/SC/010

⁴⁰ Northstowe Area Action Plan (RD/AD/130)

⁴¹ Policy E/1, RD/Sub/SC/010

⁴² Policy E/2, RD/Sub/SC/010

⁴³ Policy SS/5, RD/Sub/SC/010

⁴⁴ Policy SS/6, RD/Sub/SC/010

⁴⁵ Policy SS/8, RD/Sub/SC/010

⁴⁶ RD/Sub/C/010

⁴⁷ Paragraphs 8.10 and 8.12, RD/Sub/SC/010

33. The land supply position shows both Councils have a more than sufficient and flexible supply of employment land available to meet needs during the plan period. There is a range of sites, some under construction, some with planning permission, and others which are allocated, which have the potential to deliver across the plan period. The Plans will be subject to review (scheduled to start by 2019 as a joint Local Plan), allowing the Councils to ensure there remains a good supply for the remainder of the plan period and beyond. If circumstances change before 2019, the Councils would consider bringing this review forward in order to respond to changing demand or engaging further with developers, agents and other landowners, as identified in their respective policies or appendix on monitoring plan delivery.
34. The amount of land available exceeds anticipated growth needs in the different use classes, and allows for flexibility in supply. There will always be churn as businesses start and grow and move to new premises: a larger supply of employment land means that there is more likely to be empty land or floorspace to move into; and businesses will not have to wait as long for someone else to move out. This also means that if the economy performs more strongly than forecast, there is a buffer provided so that employment growth in the area is not constrained while the Plans are reviewed. This provides flexibility to adapt to rapid change, reflecting NPPF requirements⁴⁸.
35. There are other changes which are taking place in the Cambridge area which will help sites come forward. The City Deal will deliver significant transport improvements across transport modes, which will improve accessibility between the city centre, city fringes and other employment sites on key corridors. Sites which may have been seen as peripheral because of limited transport will become more accessible, improving their attractiveness to businesses. These sites will also be more attractive as the employment market improves following the recession. For example this has been evidenced by recent activity on Cambridge Research Park on the A10 near Waterbeach, a site where activity has been low during the recession.
36. Changes to how employment land is protected aim to be more flexible. This will encourage retention of industrial uses, by allowing hybrid buildings which incorporate offices and manufacturing and are more viable. Evidence has shown that the redevelopment of industrial land has not been viable⁴⁹: this flexible approach will help deal with this. It will also provide for high tech manufacturing uses as referred to in paragraph 18.
37. The Local Plans identify a good range in the location and type of employment sites proposed to meet the identified needs. Key matters are:
- The ELR 2012⁵⁰ indicated a good availability of employment land to meet development needs, but a shortage of office space, focused on two areas of

⁴⁸ Paragraph 14, RD/NP/010.

⁴⁹ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 4, page ii

⁵⁰ RD/E/020

pressure: the City Centre; and the northern fringe around Cambridge Science Park⁵¹. To ensure the economy's success, more office space is needed in these areas.

- The Plans respond to identified market signals, proposing significant opportunities for new employment development in and on the edge of Cambridge and at new settlements to meet future needs.
- In Cambridge, the Station Area West⁵² will deliver a significant new office development early in the plan period, known as CB1.
- Both Plans support employment-led mixed use development at Cambridge Northern Fringe East⁵³. The development potential of the area is being significantly enhanced by the opening of the new Cambridge Science Park Station in 2016. This will link up with the wider transport network, including the Cambridge to Huntingdon Busway. There are large areas of previously developed land with development potential that adjoin the new station. Reflecting the area's importance, the Councils have commenced work on the Area Action Plan (AAP), and will undertake Issues and Options consultation in Winter 2014/15. It is anticipated that the AAP will be adopted in 2016. This highly accessible urban location will be able to support high development densities, with potential to deliver over 100,000sqm of B1 floorspace, with other areas more suited to industrial or storage development. Other supporting uses will be explored through the AAP. No figures are currently included in the land supply calculations whilst the AAP is being prepared.
- South Cambridgeshire's Local Plan also supports the intensification of Cambridge Science Park⁵⁴. The appeal and accessibility of the site has been increased by investment in transport infrastructure and the replacement of low-density dated building stock and proximity to the new Science Park Station.
- In May 2013, the Government introduced a change to permitted development rights whereby offices could change to residential under of prior approval. The impact of this change thus far has been relatively limited in both districts, with no apparent change from historic trends. The Councils will continue to monitor the impact this has on employment land, and the impact of potential future widening of this process to other uses. At present, the impact is not sufficient to warrant a different approach to that included in the Plans.
- A number of representations focus on the needs for commercial R&D, high-tech manufacturing and HQ operations.
- Sites including the Cambridge Biomedical Campus, North West Cambridge, West Cambridge, Granta Park, and the Babraham Research Campus will accommodate

⁵¹ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 3, page i

⁵² Policy 20, RD/Sub/C/010

⁵³ Policy 14, RD/Sub/C/010 and Policy SS/4, RD/Sub/SC/010

⁵⁴ South Cambridgeshire Proposed Submission Local Plan, Policy E/1

commercial R&D, including lab space, and there is potential for development on other sites. There is also potential for further development on Cambridge's northern fringe and in new settlements. High-tech businesses do not necessarily need labs; many use office buildings, and can be located in higher density areas. Some sites have restrictions, such as requiring businesses to have connections with university research. However, many firms associated with the Cambridge clusters are able to meet these restrictions.

- The Plans identify a number of underused industrial sites for alternative uses. The overall land supply for manufacturing uses remains positive. There are a number of sites suitable for further developments, including Cambridge Research Park, Buckingham Business Park, Over and Northstowe, or outside the district Alconbury (in Huntingdonshire)⁵⁵. The Councils have sought to provide for both high-tech and other manufacturing within the area, but land prices dictate that most manufacturing activities are likely to be located in surrounding areas and not in Cambridge⁵⁶.
 - Following the decision of AstraZeneca to move their HQ as well as research facilities to Cambridge, there is concern that there may be further demand from high-tech firms for similar HQ moves to the Cambridge area, and that there are very few or no options for them to consider. It is unlikely that Cambridge will be seen – at least for some time – as an ideal location for HQ functions by many large high-tech firms, other than those (like ARM) which were formed and have grown here. The labour market is still relatively small compared with major cities or the Thames valley. However, AstraZeneca had a choice of at least four sites in Greater Cambridge: West Cambridge; North West Cambridge; Granta Park and the Biomedical Campus. With the exception of the Biomedical Campus, which AstraZeneca chose, all of these sites could still accommodate a similar move by another high-tech firm.
38. Reflecting the NPPF⁵⁷, the Councils' Plans proactively support growth, the delivery of employment land and premises, and the infrastructure and homes needed to support them. The Plans contain a number of significant employment allocations to meet the Cambridge area's employment land needs, alongside sites which are already committed. Furthermore, the Councils have commenced work on a joint AAP for Cambridge Northern Fringe East. This area is the next significant employment development opportunity for the city, and offers even more significant opportunities than CB1. It will re-use a large area of previously developed land and enhance the area around the new Cambridge Science Park Railway Station. This will contribute significant levels of floorspace to the Greater Cambridge economy around a key transport node.

⁵⁵ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 4.20, page 39-40

⁵⁶ South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020) paragraph 4.8-4.10, page 37

⁵⁷ NPPF (RD/NP/010) paragraph 20

Matter 4d: Do the Plans accurately identify the likely requirements for new retail development (convenience and comparison goods over the Plan period)?

39. The NPPF requires⁵⁸ Local Authorities to assess the:
- Need for retail development floorspace;
 - Role and function of town centres and the relationship between them, including any trends in performance of centres;
 - Existing centres' capacity to accommodate new town centre development; and
 - Locations of deprivation which may benefit from planned remedial action.
40. In order to address these issues, the Councils commissioned evidence base studies. In 2008, both Councils commissioned the Cambridge Sub-Region Retail Study 2008⁵⁹. This study identified capacity for 1,272sqm net capacity for additional convenience floorspace and 45,928sqm net capacity for additional comparison floorspace to 2021 across both districts.
41. In 2013, Cambridge City Council commissioned the Cambridge Retail and Leisure Study Update 2013⁶⁰ to update the 2008 study and be consistent with the NPPF. The terms of reference of the 2013 study are set out at paragraph 1.2 of that document.
42. The study identified that existing commitments absorb all forecast capacity for convenience floorspace⁶¹. The City Centre performs a top-up role, and almost all the district and local centres provide at least one convenience store to meet day to day needs⁶². Outside the network of centres, large foodstores play a key role in meeting shopping needs⁶³.
43. The forecasts of need for convenience shopping are based upon average sales densities of £12,000 per sqm net⁶⁴, the capacity available to support main foodstores. The forecasts do not identify any additional capacity for convenience floorspace above what is already planned for in the new centres. If these new shops have a lower sales density (e.g. discount retailers) or a higher sales density than that assumed in the study (or existing shops sales density changes) then this impacts on the need for new convenience floorspace. The approach taken in the Retail and Leisure Study Update is reasonable as it takes a middle ground and seeks to balance out shops which are over/under-trading⁶⁵.
44. The study found that Cambridge City Centre continues to be the most dominant comparison shopping destination in the area. The Grand Arcade's opening in 2008 attracted a number of high end operators and has proved successful, while the Grafton/Fitzroy/Burleigh Street area continues to perform a complementary role to the

⁵⁸ NPPF (RD/NP/010) paragraph 161

⁵⁹ RD/E/080

⁶⁰ RD/E/130

⁶¹ Cambridge Retail and Leisure Study Update 2013 (RD/E/130), paragraph 9.8, page 102

⁶² Cambridge Retail and Leisure Study Update 2013 (RD/E/130), paragraph 9.4-9.5, page 101

⁶³ Cambridge Retail and Leisure Study Update 2013 (RD/E/130), paragraph 9.4-9.6, pages 101-102

⁶⁴ Cambridge Retail and Leisure Study update 2013 (RD/E/130), Paragraph 7.42, page 55

⁶⁵ E.g. Cambridge Retail and Leisure Study update 2013 (RD/E/130), Page 61, 2nd bullet

Historic Core, providing a more mainstream offer. The study found that while the City Centre continues to perform well, there had been a slight decline in performance and market share since 2008⁶⁶. In terms of forecasting, the study identifies baseline capacity to support approximately 3,820sqm net additional comparison floorspace by 2017. By the virtue of growth in the baseline population and available expenditure, this will increase to 14,141sqm net by 2022, to 31,226 by 2027 and to 39,976sqm net by 2031. The study recommends that these forecasts are treated as an upper limit, reflecting uncertainties over the effect of wider developments⁶⁷ on capacity and the level of growth in special forms of trading, particularly online spending. Scenario testing showed that with even a slightly larger increase in online spending, the comparison floorspace is only likely to grow by 4,579sqm net by 2027 and 12,444sqm net by 2031. Given the City Centre's physical constraints, there is potential for retailers to maximise efficiencies with the effect of reducing overall need. The study also recommends that the Council should focus on meeting the identified need in comparison floorspace to 2022 (i.e. 14,141sqm net) and closely monitor comparison floorspace.

45. Whilst the uncertainties in paragraph 42 are acknowledged Cambridge City Council accepted the recommendation of the 2013 study to meet retail needs to 2022. The Cambridge City Centre Capacity Study⁶⁸ identifies capacity for up to 12,000sqm of retail capacity through the redevelopment of the Grafton Centre although the precise quantum is subject to detailed testing⁶⁹. Policies 6, 9 and 11 of the Cambridge Local Plan⁷⁰ reflect this position. The rest of the capacity to 2022 will be met through appropriate redevelopment and infill in the City Centre and through increased density of trading from existing shops.
46. Relying only on opportunities in Cambridge's Historic Core and on increased trading density is not a reasonable approach for the Plans to take. Opportunities in the Historic Core are limited and these opportunities would be unlikely to deliver sufficient capacity to meet needs to 2022. The Grafton Centre allocation is a key opportunity and capable of delivering comparison floorspace subject to detailed testing⁷¹. Cambridge City Council and M&G have committed, in a Statement of Common Ground⁷², to work together on the redevelopment of the Grafton/Fitzroy/Burleigh Street area. Furthermore, shops in this part of Cambridge are not as attractive a destination to customers as those in the Historic Core⁷³ and investment will help revitalise the area.

⁶⁶ Paragraph 9.10 of RD/E/130.

⁶⁷ Cambridge Retail and Leisure Study Update 2013 (RD/E/130), paragraphs 7.57-7.62 and table 7.3, page 59-60

⁶⁸ RD/E/120

⁶⁹ Cambridge City Centre Capacity Study (RD/E/120), Page 76

⁷⁰ RD/Sub/C/010

⁷¹ Cambridge City Centre Capacity Study (RD/E/120), Page 76

⁷² Statement of Common Ground as agreed between Cambridge City Council and M&G Real Estate (RD/SCG/020)

⁷³ Cambridge Retail and Leisure Study update 2013 (RD/E/130), Paragraph 4.38, 1st bullet, Pages 33-

47. Regarding the threshold for new retail development in Cambridge, the Retail and Leisure Study Update⁷⁴ concluded that given the City Centre's strength, there is not sufficient justification to support a lower locally set threshold for retail above which an impact assessment will be required. It recognised that the role and function of the district and local centres is more reliant on convenience goods shopping and there might be a justification to adopt a lower threshold specifically for convenience goods. However, to maintain a degree of control over both convenience and comparison goods, a flexible policy should be developed. This should acknowledge that, in normal circumstances, retail development below the NPPF threshold⁷⁵ would not require an impact assessment. However, there may be times that the Council would require an assessment for proposals below this floorspace⁷⁶, due to concerns over cumulative impact and/or the role/health of nearby centres within the catchment of the proposal. Applicants should be encouraged to engage with the Council at an early stage in the planning process. Policy 6 in the Cambridge Local Plan⁷⁷ is not unduly restrictive to new developments and retains some flexibility in its application.
48. South Cambridgeshire is unusual in that it currently does not have any town centres. The focus for shopping is Cambridge and the market towns on the edge of the district. Village centres provide for local needs. Rural Centres provide for a small rural hinterland, but are not appropriate locations for retail serving a wider function. A new town centre is planned at Northstowe, and the Local Plan proposes that Waterbeach will also be a new town. Both will provide facilities of a suitable scale for sustainable new towns, but not on a level that they would compete with Cambridge as a Sub-Regional Shopping Centre.
49. The 2008 Retail Study⁷⁸ concluded that there would be capacity to accommodate the phased development of Northstowe for convenience shopping, and this would meet anticipated needs to 2021⁷⁹. The Cambridge Retail and Leisure Study Update 2013⁸⁰ also takes account of Northstowe, identifying the potential drawback of spending currently directed towards Cambridge. The Northstowe Town Centre planning application is currently being considered⁸¹, which will determine the scale of retail in the settlement. Retail needs will be an issue for future area action plans for the new settlements.

⁷⁴ RD/E/130

⁷⁵ Paragraph 26 of RD/NP/010.

⁷⁶ Cambridge Retail and Leisure Study Update 2013 (RD/E/130), paragraph 9.49-9.50, page 110

⁷⁷ RD/Sub/C/010

⁷⁸ RD/E/080

⁷⁹ At that time, it was envisaged the Northstowe town centre would be completed by 2021.

⁸⁰ RD/E/130

⁸¹ Considered against policies in the Northstowe Area Action Plan (RD/AD/130)

Appendix 1: List of Reference Documents

The Councils' evidence in relation to employment and retail is set out in the following documents:

National policy:

- National Planning Policy Framework (RD/NP/010);
- National Planning Practice Guidance (RD/NP/020).

South Cambridgeshire District Council submission documents:

- Proposed Submission South Cambridgeshire Local Plan (RD/Sub/SC/010).

Cambridge City Council submission documents:

- Cambridge Local Plan 2014 – Proposed Submission (RD/Sub/C/010);
- Cambridge City Council Statement of Consultation and Audit Trails (RD/Sub/C/080).

Topic papers:

- Joint Working and Development Strategy Topic Paper (RD/Top/010);
- Joint Employment Topic Paper (RD/Top/020);
- Joint Retail Topic Paper (RD/Top/040).

Earlier stages of plan-making:

- South Cambridgeshire District Council Issues and Options Report (RD/LP/030);
- Cambridge Local Plan – Towards 2031: Issues and Options Report (RD/LP/240).

Adopted development plan documents:

- South Cambridgeshire District Council Northstowe Area Action Plan (RD/AD/130);
- South Cambridgeshire Annual Monitoring Report 2012-13 (RD/AD/270);
- Cambridge City Council & South Cambridgeshire District Council - North West Cambridge Area Action Plan (RD/AD/290).

Development strategy:

- Population, Housing and Employment Forecasts Technical Report (RD/Strat/080);
- Cambridge Sub-Region Strategic Housing Market Assessment (RD/Strat/090);
- Memorandum of Cooperation May 2013 (RD/Strat/100);
- East Cambridgeshire Local Examination Inspector's Interim Conclusions – 14 July 2014 (RD/Strat/310);
- Report on the Fenland District Council Core Strategy Local Plan Examination – April 2014 (RD/Strat/320).

Economy and tourism:

- South Cambridgeshire and Cambridge City Employment Land Review 2008 (RD/E/010);
- South Cambridgeshire and Cambridge City Employment Land Review Update 2012 (RD/E/020);
- South Cambridgeshire and Cambridge City Employment Land Review Update – Addendum 2013 (RD/E/030);

- Cambridge Cluster at 50: The Cambridge Economy Retrospect and Prospect 2011 (RD/E/060);
- Cambridge Sub-Regional Retail Study 2008 (RD/E/080);
- Cambridge City Centre Capacity Study 2013 (RD/E/120);
- Cambridge Retail and Leisure Study Update 2013 (RD/E/130);
- Cambridge Hotel Futures Study (RD/E/150).

Transport and infrastructure:

- Cambridge City and South Cambridgeshire Infrastructure Delivery Study 2012 (RD/T/010);
- Cambridge City and South Cambridgeshire Infrastructure Delivery Study Update 2013 (RD/T/020).

Statements of Common Ground:

- Statement of Common Ground as agreed between Cambridge City Council and M&G Real Estate (RD/SCG/020).

Appendix 2: Consideration of the National Planning Policy Guidance with respect of Main Matter 4b

The following provides a summary of key issues from the NPPG regard identifying and planning for retail and employment needs, and how they have been addressed. A full version comparing the Councils approach to each relevant paragraph of the NPPG can be found in reference document: Cambridge and South Cambridgeshire Local Plan - Consideration of the National Planning Policy Guidance with respect of Employment and Retail (RD/Strat/380).

Employment

Paragraph: 002 Reference ID: 2a-002-20140306

Identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development.

This objectively assessed need for jobs is identified in the SHMA as 22,100 additional jobs in Cambridge and 22,000 additional jobs in South Cambridgeshire. The ELR Update 2012 (RD/E/020) and ELR Update 2013 (RD/E/030) identify the land and floorspace required for employment development over the Plan period to provide those jobs for both districts. It also analyses and discusses the qualitative needs for new employment development over the plan period.

Paragraph: 007 Reference ID: 2a-007-20140306

'Local planning authorities should assess their development needs working with the other local authorities in the relevant HMA or functional economic market area in line with the duty to cooperate'.

The SHMA was jointly prepared by all local authorities in the Cambridge sub-regional housing market area which is also a functional economic area and identified the objectively assessed needs for jobs and homes, taking account of economic forecasts.

Paragraph: 007 Reference ID: 2a-007-20140306

'Local communities, partner organisations, Local Enterprise Partnerships, businesses and business representative organisations, house builders, parish and town councils, designated neighbourhood forums preparing neighbourhood plans and housing associations should be involved from the earliest stages of plan preparation, which includes the preparation of the evidence base in relation to development needs.'

The ELR 2012 (RD/E/020) involved interviews with local businesses and agents. The Retail and Leisure Study Update 2013 (RD/E/130) involved a survey of households. There was also extensive participation in the plan making process by range of stakeholders, through workshops and consultation, as identified in the Councils respective Statements of Consultation (Cambridge: RD/Sub/C/080; South Cambridgeshire RD/Sub/SC/090).

Paragraph: 030 Reference ID: 2a-030-20140306

'In understanding the current market in relation to economic and main town centre uses, plan makers should liaise closely with the business community to understand their current and potential future requirements'.

There has been thorough consultation with all relevant stakeholders including with the business community in order to better understand their current and potential future requirements. Specifically, the ELR 2012 (RD/E/020) involved interviews with local businesses and agents in order to inform the assessment of employment land needs.

Paragraph: 030 Reference ID: 2a-030-20140306

'The recent pattern of employment land supply and loss to other uses (based on extant planning permissions and planning applications)'.

The ELR 2008 (RD/E/010) analysed past completions and losses of employment land⁸², and this analysis identified the past historic pattern of losses of employment land in Cambridge and gains in South Cambridgeshire. This analysis looked at sub-areas and market segments within each authority area. This pattern of development was analysed further in the ELR 2012 (RD/E/020), which examined where losses had taken place and where there were areas of high demand (see paragraphs 3.3-3.17 & 3.45).

Paragraph: 030 Reference ID: 2a-030-20140306

Summary: *'Market intelligence; Market Signals; locational requirements of particular types of business; The existing stock of employment land; Identification of oversupply and evidence of market failure'*

The ELR 2012 (RD/E/020) was informed by a review of the commercial property market by Savills. This review examined how different property market areas functioned, cross-checked between local authority data and Savills' own economic data, and involved interviews with businesses and other stakeholders. This review included exploring rental yields and land values. The Cambridge Cluster at 50 (RD/E/060), commissioned by EEDA, also involved extensive interviews with the business community. The Cambridge Cluster at 50 study is a key piece of evidence base that has informed the Councils' Plans.

Both the ELR 2008 (RD/E/010) and the ELR 2012 (RD/E/020) considered the existing stock of employment land and buildings. The ELR 2012 (RD/E/020) considered statistics on take-up as well as a range of other primary and secondary data. This is used to help inform the likely business needs and future market requirement for employment land.

The ELR 2012 (RD/E/020) also looked at physical and ownership constraints that may prevent sites coming forward. It does not identify any specific constraints, but does note the lack of speculative employment development in the area⁸³.

The ELR 2012 (RD/E/020) analyses which segments of the market are oversupplied and which are undersupplied and explores the quality and quantity of sites available in different sub markets. The ELR 2012 (RD/E/020) identifies issues in the supply of office space in Cambridge City Centre and the northern fringe in the medium term and difficulties in retaining industrial land in Cambridge when competing against higher value uses. The Plans

⁸² Employment Land Review 2008 (RD/E/010), maps 1-8; paragraphs 4.3-4.13, pages 33-37 and 4.82-4.85, pages 54-55

⁸³ ELR 2012 (RD/E/020) paragraphs 3.13, 3.26, 3.32 and 3.45

responds to these issues by planning for significant new employment development around the new railway station at Cambridge Northern Fringe East, protecting offices throughout Cambridge and protecting industrial land in Cambridge.

Paragraph: 032 Reference ID: 2a-032-20140306

'Plan makers should consider forecasts of quantitative and qualitative need (i.e. the number of units and amount of floorspace for other uses needed) but also its particular characteristics (e.g. footprint of economic uses and proximity to infrastructure).'

The ELR 2012 (RD/E/020) analyses which segments of the market are oversupplied and which are undersupplied and explores the quality and quantity of sites available in different sub markets. The ELR 2012 identified issues in the supply of office space in Cambridge City Centre and the northern fringe in the medium term and difficulties in retaining industrial land in Cambridge when competing against higher value uses.

Paragraph: 030 Reference ID: 2a-030-20140306

'consider projections (based on past trends) and forecasts (based on future scenarios)'

The ELR 2012 (RD/E/020) and 2013 (RD/E/030) considered forecasts and past trends.

Paragraph: 033 Reference ID: 2a-033-20140306

'When translating employment and output forecasts into land requirements, there are four key relationships which need to be quantified. This information should be used to inform the assessment of land requirements. The four key relationships are:

- *Standard Industrial Classification sectors to use classes;*
- *Standard Industrial Classification sectors to type of property;*
- *employment to floorspace (employment density); and*
- *floorspace to site area (plot ratio based on industry proxies).'*

All four key relationships were examined in the ELR

Retail

Paragraph: 002 Reference ID: 2a-002-20140306

'Identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development.'

The Cambridge Retail and Leisure Update 2013 (RD/E/130) identifies the floorspace required for retail and leisure development over the plan period for Cambridge. It also analyses and discusses the qualitative needs for new employment development over the plan period. Cambridge acts as a sub-regional centre and meets the retail needs of many residents of South Cambridgeshire.

In South Cambridgeshire, the 2008 Retail Study concluded that there would be capacity to accommodate the phased development of Northstowe for convenience shopping, and this would meet anticipated needs to 2021 (at that time it was envisaged the town centre would be completed by 2021). The Cambridge Retail and Leisure Study Update 2013 (RD/E/130)

also takes account of Northstowe, identifying the potential clawback of spending currently directed towards Cambridge. The Northstowe Town Centre planning application is currently being considered, which will determine the scale of retail in the settlement, and will be considered against policies in the Northstowe Area Action Plan. Retail needs will be an issue for future area action plans for the new settlements proposed in the Local Plan.

Paragraph: 004 Reference ID: 2b-004-20140306

'Local planning authorities should take full account of relevant market signals when planning for town centres and should keep their retail land allocations under regular review.'

The Cambridge Retail and Leisure Study Update 2013 (RD/E/130) looked at the following market signals that were taken into account when developing policy:

- Advice on economic outlook⁸⁴;
- Research on internet shopping⁸⁵;
- Advice on sales efficiency⁸⁶;
- Modelling of space requirements⁸⁷;
- Surveys of floorspace and retail units⁸⁸;
- Published retailer requirements⁸⁹; and
- Household telephone survey⁹⁰.

Paragraph: 005 Reference ID: 2b-005-20140306

'The following indicators, and their changes over time, are relevant in assessing the health of town centres:

- *diversity of uses*
- *proportion of vacant street level property*
- *commercial yields on non-domestic property*
- *customers' views and behaviour*
- *retailer representation and intentions to change representation*
- *commercial rents*
- *pedestrian flows*
- *accessibility*
- *perception of safety and occurrence of crime*
- *state of town centre environmental quality*

Not all successful town centre regeneration projects have been retail led or involved significant new development. Improvements to the public realm, transport (including parking) and accessibility as well as other measures promoted through partnership can also play important roles. Any strategy should identify relevant sites, actions and timescales, and be

⁸⁴ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 14 ,Paragraphs 3.3-3.7

⁸⁵ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 15, Paragraphs 3.8-3.10

⁸⁶ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 17, Paragraphs 3.16-3.20

⁸⁷ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 18, Paragraphs 3.21-3.23

⁸⁸ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 26-27 & 31, Tables 4.3-4.6

⁸⁹ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 32, Table 4.7

⁹⁰ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 33-34, Paragraph 4.38

articulated clearly in the Local Plan, where it can be considered by local people and investors. It should be regularly reviewed, assessing the changing role and function of different parts of the town centre over time.'

The Cambridge Retail and Leisure Study 2013 assesses the health of the City Centre⁹¹ against a number of criteria including:

- The range of facilities on offer;
- The convenience and comparison offer;
- Its accessibility and parking restrictions;
- The quality of the shopping environment;
- The representations of various retailers;
- Safety;
- The potential for environmental improvements;
- Customers' views;
- Vacancy rate; and
- Scope for expansion.

The Cambridge Retail and Leisure Study 2013 (RD/E/130) also looks at the Local and District Centres⁹².

Paragraph: 009 Reference ID: 2b-009-20140306

'Local Plans should contain policies to apply the sequential test to proposals for main town centre uses that may come forward outside the sites or locations allocated in the Local Plan.'

Cambridge City Council's strategy of meeting all comparison floorspace needs to 2022 within the City Centre (the focus is on the Area of Major Change at the Grafton/Fitzroy/Burleigh Street⁹³) has meant that there has not been a need to apply the sequential approach. Policy 6 in the Cambridge Local Plan requires the implementation of the sequential approach to retail and other main town centre uses.

The South Cambridgeshire Submission Local Plan Policy E/21 and E/22 require implementation of a sequential approach to retail.

⁹¹ Cambridge Retail and Leisure Study 2013 (RD/E/130), Page 34, Bullets 1-5

⁹² Cambridge Retail and Leisure Study 2013, Section 5

⁹³ Cambridge Local Plan (RD/Sub/C/010) Policies 6, 9 and 11

Appendix 3 Forecast Employment Needs of South Cambridgeshire based on the SHMA EEFM Forecast

Forecast Employment Needs of South Cambridgeshire based on the SHMA EEFM Forecast

	South Cambridgeshire jobs growth range ('000): SHMA EEFM	Net Floorspace Forecast ('000 sqm GEA) range	Land requirement (ha)*
Office – B1a	4.2	59	18.0
R&D – B1b	7.8	109	33.2
Industrial – B1c/B2	-1.7	-74	-17.7
Warehouse – B8	1.1	76	15.3
TOTAL	11.5	170	48.9

*Assumes out of town densities of 3,282sqm per ha.

Comparison with LEFM Used in the Employment Land Review

	B1A	B1B	B2	B8	TOTAL
Jobs in 'B' Use Classes (000's)					
LEFM	8.2	4.1	-0.7	0.3	11.9
SHMA EEFM	4.2	7.8	-1.7	1.1	11.5
Difference	-4.0	3.7	-1.0	0.8	-0.4
Floorspace (sqm)					
LEFM	100,000	50,000	-27,000	19,000	142,000
SHMA EEFM	59,225	109,072	-74,385	76,734	170,646
Difference	-40,775	59,072	-47,385	57,734	28,646
Land (ha.)					
LEFM	30.6	15.3	-6.4	3.8	43.3
SHMA EEFM	18.0	33.2	-17.7	15.3	48.9
Difference	-12.6	17.9	-11.3	11.5	5.6

Appendix 4: Response to issues raised on methodology of the Employment Land Review 2011 and 2012.

The assumptions that underpin the ELR Updates 2012 and 2013 are reasonable and robust. The methodology was the same as that used in the ELR 2008, and was updated where appropriate. In particular:

- “Whole economy” ratios are used in the conversion of total forecast jobs to FTE⁹⁴ jobs; these are based on conclusions from the Business Register and Employment Survey. The whole economy ratios are based on the FTE by local authority.
- Assumptions around density of employees to floorspace are reasonable. Businesses are increasing density in order to reduce costs. Increased home working and flexible working is facilitating this⁹⁵. Some new office developments are higher density than those assumed in the ELR 2012 e.g. ARM are aiming for 10sqm per employee. Much R&D activity can be undertaken in buildings indistinguishable from B1a offices, and therefore at relatively high density per employee (for example, Microsoft Research moved within Cambridge from a B1b building on the University’s West Cambridge campus to a B1a building in CB1, close to the station; Redgate Technology, one of the success stories of Cambridge high-tech, occupy B1a office premises on Cambridge Business Park). When lab space is involved (e.g. in Bioscience research) that density per employee can increase, but this depends on the type of laboratories and the mix between labs and offices in a building. For example, two recent planning applications for laboratory buildings for University departments proposed floorspace densities of 12 and 17sqm per employee⁹⁶. Overall, the job densities assumed are reasonable and robust.
- The densities assumed of floorspace per ha are cautious. Much of the development around Cambridge station is being built out at far higher densities than that assumed in the ELR 2012 (average floorspace per ha across four office developments at CB1 is 22,989sqm/ha⁹⁷). Development at Cambridge Northern Fringe East will be able to deliver high density employment development.
- Structural economic change means that the total amount and mix of employment land, floorspace and job densities are constantly changing. Some employment land has been lost to other uses (mainly housing), despite planning policies which resist such change. Other land is being redeveloped at higher densities – in some cases, much higher. Uses and densities within buildings also change as firms’ requirements change. Typically, job densities increase as firms seek to use more

⁹⁴ Full Time Equivalent

⁹⁵ ELR 2012 RD/E/020, paragraphs 4.11-4.13, pages 37-38

⁹⁶ Department of Chemical Engineering and Biotechnology proposes a building, including laboratory space and lecture theatres, of 10,353sqm (GIA) at a density of 16.97sqm per FTE (source, planning application 12/1138/REM) and Department of Materials Science and Metallurgy proposes a building of 6,140sqm (net), which includes laboratory space, at a density of 12.28sqm per FTE. (source, planning application 10/538/REM)

⁹⁷ Planning applications: 22 Station Road (12/1237/REM) 33,272sqm/ha; 50&60 Station Road (12/1556/FUL) 18,343sqm/ha; A1 and A2 Station Square (12/1608/FUL) 21,224sqm/ha; and 21 Station Road (10/0797/REM) 25,805sqm/ha

expensive space more efficiently, and working practices change. All these factors need to be taken into account in planning for new employment space.

APPENDIX 5 - Updated Employment Land Supply 2013/14 and other significant sources of supply

Introduction

The tables below provide an up to date position on employment land supply in Cambridge and South Cambridgeshire. They include the net supply of employment land and floorspace with planning permission, and proposed allocations in the Local Plans.

The tables in section 1 provide an overview of supply, and include all the supply identified in the tables in sections 2 to 5.

The tables in sections 2 to 4 reflect the data published in the Annual Monitoring Reports (*Cambridge Annual Monitoring Report 2013 RD/AD/350, and South Cambridgeshire Annual Monitoring Report 2014 RD/AD/270*) and therefore show the employment land supply situation as at 31 March 2013. The data for some sites has been revised to take account of the latest information to give a more accurate picture of employment land supply. They exclude capacity from proposed Area Action Plans, which will determine the quantity of employment in these areas.

The tables in section 5 show major planning permissions that have been granted or have been approved subject to the signing of a section 106 agreement. Where the major new planning permissions (section 5) partly supersede planning permissions included in 2013 data (sections 2 to 4), the 2013 data has been updated so that the buildings and land are not double counted.

Finally, Section 6 summarises information on completions since 2011, as published in the Annual Monitoring Reports.

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TABLE 1.1 - CAMBRIDGE AND SOUTH CAMBRIDGESHIRE – FLOORSPACE (NET)

	Existing Planning Permission	Allocation without planning permission	Planning Permissions Granted Since 1 April 2013	Total
Cambridge City	201,474	65,710	24,610	291,794
South Cambridgeshire - Edge of Cambridge	2,607	54,245	22,386	79,238
South Cambridgeshire - excluding Edge of Cambridge	225,975	82,937	42,755	351,667
Total	430,056	202,892	89,751	722,699

TABLE 1.2 - CAMBRIDGE AND SOUTH CAMBRIDGESHIRE – LAND (NET)

	Existing Planning Permission	Allocation without planning permission	Planning Permissions Granted Since 1 April 2013	Total
Cambridge City	23.51	-1.64	2.67	24.54
South Cambridgeshire - Edge of Cambridge	-2.34	7.40	2.83	7.89
South Cambridgeshire - excluding Edge of Cambridge	80.63	16.25	21.20	118.08
Total	101.80	22.01	26.70	150.51

TABLE 1.3 – CAMBRIDGE – NET EMPLOYMENT SUPPLY BY TYPE

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	312	25,803	180,196	290	-868	-4,259	23.51
Allocation without planning permission	-5,944	11,895	98,076	468	-30,526	-8,259	-1.64
Planning permissions granted since 1 April 2013	0	34,084	0	0	0	-9,474	2.67
TOTAL	-5,632	71,782	278,272	758	-31,394	-21,992	24.54

TABLE 1.4 - SOUTH CAMBRIDGESHIRE – NET EMPLOYMENT SUPPLY BY TYPE

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	11,318	55,441	96,905	13,515	15,281	36,122	78.29
Allocation without planning permission (excluding proposed area action plans)	81,974	0	42,500	1,412	-3,475	14,771	23.65
Planning permissions granted since 1 April 2013	0	15,798	38,940	2,431	7,676	296	24.03
TOTAL	93,292	71,239	178,345	17,358	19,482	51,189	125.97

TABLE 1.5 - CAMBRIDGE AND SOUTH CAMBRIDGESHIRE – NET EMPLOYMENT SUPPLY BY TYPE

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	11,630	81,244	277,101	13,805	14,413	31,863	101.80
Allocation without planning permission	76,030	11,895	140,576	1,880	-34,001	6,512	22.01
Planning permissions granted since 1 April 2013	0	49,882	38,940	2,431	7,676	-9,178	26.70
TOTAL	87,660	143,021	456,617	18,116	-11,912	29,197	150.51

TABLE 2.1 - CAMBRIDGE CITY - PLANNING PERMISSIONS

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: Land Between Huntingdon Road, Madingley Road And M11 North West Cambridge (C/01114/11)			31,200				7.55	Jointly adopted Area Action Plan with Cambridge City Council. Outline planning permission for development to meet the needs of the University of Cambridge, including market, key worker and student housing, new faculty buildings and research facilities, and a local centre. The site includes 100,000m2 of employment floorspace, of which up to 40,000m2 is for commercial research, the remainder being academic research. Figures in this table reflect the proportion in this district.
Cambridge: 1 Ditton Walk (C/00861/10)		-593				-931	-0.28	Loss of warehouse and office to residential.
Cambridge: 125 Cowley Road (C/01423/12)					2,000	-1,600	0.00	Change from storage and distribution to general industry.
Cambridge: 141 Ditton Walk (C/00596/11)		-1,990					-0.34	Loss of offices to residential.
Cambridge: 32-38 Station Road (C/01222/12)		-693					-0.18	Part of CB1 redevelopment.
Cambridge: 8 Rosemary Lane (C/01298/10)						930	0.19	New warehouse.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: 9-15 Harvest Way (C/00219/11)						-2,835	-0.34	Part of existing mixed use allocation in adopted Local Plan, planning application for residential on this part of the site. The site has been cleared.
Cambridge: Car Park Adjoining Unix House, 132 - 134 Hills Road (C/00653/06)		3,902					0.00	New office development.
Cambridge: City House, 126-130 Hills Road (C/01181/10)		3,559					0.00	New office development.
Cambridge: Demeter House, Station Road (C/01237/12)		2,141					-0.22	Part of CB1 redevelopment.
Cambridge: Elizabeth House, 1 High Street (C/00591/12)		-3,995					-1.09	Change of use from offices to student accommodation.
Cambridge: Foster Mill, Station Road (C/00633/11/1)					-3,154		-0.11	Part of CB1 redevelopment.
Cambridge: Land South and West of Existing Addenbrookes Campus, Hills Road (C/00796/06)		333	129,000				12.69	Part of existing allocation in adopted Local Plan for clinical, research and other uses.
Cambridge: Parkers House, 38-62 Regent Street (C/00410/12)		-2,875					-0.27	Conversion of offices to student units.
Cambridge: Plot J, West Cambridge Campus Site, Madingley Road (C/00034/13)			2,210				0.22	Part of existing allocation in adopted Local Plan university uses, proposed to be carried forward in the new Local Plan.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: Redevelopment Station Area CB1, Station Road (C00266/08/1)		24,020					4.16	The remainder of the CB1 redevelopment an existing mixed use allocation that is proposed to be carried forward into the new Local Plan.
Cambridge: The Greyhound, 93 Coldhams Lane (C/00255/12)	262				261	261	0.24	Redevelopment from public house to employment uses.
Cambridge: Triangle Development Site, Kings Hedges Road (C/00199/12)		3,412					0.25	Change of use to allow the Future Business Centre to also operate as offices.
Cambridge: West of Cambridge Site, Madingley Road (C/00961/97)			17,786				1.74	The remainder of the West Cambridge development, an existing allocation for university uses that is proposed to be carried forward into the new Local Plan.
'Small Sites' Total of 42 sites where each total floorspace <500m	50	-1,418		290	25	-84	-0.70	

TABLE 2.2 - CAMBRIDGE CITY - ALLOCATIONS WITHOUT PLANNING PERMISSION

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge Northern Fringe East (Cambridge Part) (Cambridge Proposed Submission Local Plan Policy 14)								<p>Area comprising mainly previously developed land on the edge of Cambridge, adjoining the new Cambridge Science Park Railway Station. Both Local Plans propose mixed use employment led redevelopment of the site.</p> <p>Given the accessibility and urban context of the site there is potential to achieve high floorspace densities for B1 uses. Other areas of the site will be more suited to industrial or storage uses. The cross boundary site has potential to deliver over 100,000m² of B1, and a significant amount of B2/B8.</p> <p>The capacity will be confirmed through Area Action Plan. A number of options will be explore through the Issues and Options Report in December 2014, which would deliver a range of different employment floorspace scenarios, and different level of provision in each district.</p> <p>The capacity will depend on the final mix of uses proposed in the Area Action Plan.</p>
Cambridge: 1 and 7-11 Hills Road (E5)		953					0.00	New allocation to support densification of offices. Assumes 10% increase in floorspace for the area of the site.
Cambridge: 19 Acre Field, Storeys Way (CA/00100/04)			4,652				0.59	Part of North West Cambridge allocation.

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: 315-349 Mill Road and Brookfields (R21)		3,405					0.50	New mixed use allocation. Allocated for up to 1 hectare employment, assumes 0.5 ha of office.
Cambridge: 379-381 Milton Road (M1)		3,609					0.53	Existing residential allocation in adopted Local Plan, proposed to be carried forward to as a mixed use allocation including 05 hectares of office.
Cambridge: Addenbrookes Hospital, Babraham Road (CA/00101/03)			1,000				0.24	Part of existing allocation in adopted Local Plan for clinical, research and other uses.
Cambridge: Church End Industrial Estate, Rosemary Lane (E4)					2,423		0.00	New allocation to support densification of industry. Assumes 10% increase in floorspace for the area of the site.
Cambridge: Clifton Road (M2)		9,192			-21,000		-3.65	New mixed use allocation. Allocated for 2 hectares employment, assumes 1.35 ha of new offices, as some existing offices on the site.
Cambridge: Fulbourn Road, west 1 & 2 (Cambridge Proposed Submission Local Plan GB3 & GB4)			25,193				3.70	New allocation to expand Peterhouse Technology Park.
Cambridge: Henry Giles House, Chesterton Road (CA/00118/03)		-7,522					-0.79	Existing residential allocation in adopted Local Plan, proposed to be carried forward in the Local Plan.
Cambridge: Huntingdon Road (CA/00030/00)			2,231				0.28	Part of North West Cambridge allocation.
Cambridge: Land adjacent to 172-77 New Street (COA/00003/03)	-1,942				-504	-1,033	-0.37	Part of existing mixed use allocation in adopted Local Plan.

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: Land adjacent to Brickyard Industrial Estate, Coldhams Road (COA/00002/03)				560	-1,227		-0.08	Existing employment allocation in adopted Local Plan, not proposed to be carried forward.
Cambridge: Land around 16 Mill Lane (COA/00004/04)		6,000					0.28	Existing mixed use allocation in adopted Local Plan, proposed to be carried forward in the new Local Plan.
Cambridge: Land at former Magnet Warehouse, Mill Road (COA/00002/04)						-2,191	-0.60	Existing mixed use allocation in adopted Local Plan, proposed to be carried forward and expanded in the new Local Plan as R21.
Cambridge: Land South of Addenbrookes, Hills Road (COA/00001/04)			21,000				3.50	Existing safeguarded land in adopted Local Plan for clinical, research and other uses.
Cambridge: Land surrounding 1-3 Coldhams Lane (COA/00003/04)		-1,812					-0.33	Existing mixed use allocation not proposed to be carried forward.
Cambridge: Michael Young Centre, Purbeck Road (M3)		-259		-92		-544	-0.80	New mixed use allocation, figures taken from approved outline planning application (planning application not in commitment figures).
Cambridge: Mitchams Corner, Victoria Road (CA/00124/03)		2,210					0.09	Existing mixed use allocation, not proposed to be carried forward into the new plan.
Cambridge: Mount Pleasant House, Mount Pleasant (R17)		-3,881					-0.57	New residential allocation.
Cambridge: The Paddocks Trading Estate, Cherry Hinton Road (CA/00108/03)	-4,002				-4,491	-4,491	-2.72	Existing residential allocation, proposed to be carried forward in the new Local Plan.

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge: West Cambridge Site (M13)			44,000				0.00	The new Local Plan proposes a densification of the West Cambridge allocation. Figures from University estimates.
Cambridge: Willowcroft, Histon Road (CA/00024/00)					-5,727		-1.44	Existing residential allocation, that is proposed to be carried forward into the new Local Plan.

TABLE 2.3 - CAMBRIDGE CITY - SUMMARY

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	312	25,803	180,196	290	-868	-4,259	23.51
Allocation without planning permission	-5,944	11,895	98,076	468	-30,526	-8,259	-1.64

TABLE 3.1 – SOUTH CAMBRIDGESHIRE - EDGE OF CAMBRIDGE PLANNING PERMISSIONS

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge Science Park (Existing Permissions) (S/00303/10) (S/01257/08) (S/02621/12)			-1,264				-0.85	Part of redevelopment of early phases. Demolition of office buildings, replacement with new office buildings but also other uses such as hotel.
North West Cambridge, (University Site) (S/01886/11)			8,800				2.37	Jointly adopted Area Action Plan with Cambridge City Council. Outline planning permission for development to meet the needs of the University of Cambridge, including market, key worker and student housing, new faculty buildings and research facilities, and a local centre. The site includes 100,000m ² of employment floorspace, of which up to 40,000m ² is for commercial research, the remainder being academic research. Figures in this table reflect the proportion in this district.
Trumpington Meadows (S/00054/08/1) (S/00160/11)			-4,929				-3.86	Housing led mixed use development as identified in the South Cambridgeshire Cambridge Southern Fringe Area Action Plan.

TABLE 3.2 – SOUTH CAMBRIDGESHIRE - EDGE OF CAMBRIDGE ALLOCATIONS WITHOUT PLANNING PERMISSION

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge East - North of Newmarket Road (South Cambridgeshire Submission Local Plan Policy SS/3)	1,600						0.50	The Wing development is proposed to incorporate a mix of uses. The quantity reflects the pending Planning Application (S/2682/13/OL). Inclusion in this table is without prejudice to the determination of the application.
Cambridge Northern Fringe East (South Cambridgeshire Part) (South Cambridgeshire Submission Local Plan Policy SS/4)								<p>Area comprising mainly previously developed land on the edge of Cambridge, adjoining the new Cambridge Science Park Railway Station. Both Local Plans propose mixed use employment led redevelopment of the site.</p> <p>Given the accessibility and urban context of the site there is potential to achieve high floorspace densities for B1 uses. Other areas of the site will be more suited to industrial or storage uses. The cross boundary site has potential to deliver over 100,000m² of B1, and a significant level of B2/B8.</p> <p>The capacity will be confirmed through Area Action Plan. A number of options will be explore through the issues and options Report in December 2014, which would deliver a range of different employment floorspace scenarios, and different level of provision in each district.</p> <p>Capacity will depend on the final mix of uses proposed in the Area Action Plan.</p>

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambridge Science Park - Potential for Intensification (South Cambridgeshire Submission Local Plan Policy E1)			30,000				0.00	The Proposed Submission South Cambridgeshire Local Plan includes Policy E/1 which supports the intensification of employment uses on the Science Park. Intensification on a number of sites already has planning permission. The emerging Cambridge Northern Fringe East Employment Study (which will accompany the issues and options report) estimates potential for an increase in floorspace over the next 15 to 20 years of 30,000 to 40,000 square metres, but this would depend on a range of factors, such as buildings becoming available for redevelopment..
Fulbourn Road East (South Cambridgeshire Submission Local Plan Policy E/2)	22,645						6.90	Proposed new employment allocation in South Cambridgeshire Submission Local Plan, adjoining the Perterhouse Technology Park. Capacity based on typical out of centre density from ELR 2012

TABLE 3.3 – SOUTH CAMBRIDGESHIRE - EDGE OF CAMBRIDGE SUMMARY

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	0	0	2,607	0	0	0	-2.34
Allocation without planning permission	24,245	0	30,000	0	0	0	7.40

TABLE 4.1 – SOUTH CAMBRIDGESHIRE PLANNING PERMISSIONS (excluding Edge of Cambridge sites in table 3.1)

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Babraham: Babraham Research Campus (S/00600/12) (S/01413/12) (S/02016/11)			4,772				-1.53	Babraham Research Campus Provide start up and grow on space for Biotech companies, including labs and office space. <i>Detailed planning permissions granted in June 2013 and March 2014 for research and development buildings totalling 5,038 sqm (1.53 ha); these buildings have been deducted from this figure to prevent double counting.</i>
Balsham: Dotterell Hall, Cambridge Road (S/00307/11) (S/02642/13)		1,350					0.95	Conversion of barns for B1 office use and erection of new office building. <i>Time limit for planning permission to be implemented extended by S/2642/13 granted in February 2014.</i>
Bar Hill: 17-19 Trafalgar Way (S/01356/12)				-518	518		0.00	Change of use of building within industrial estate.
Bar Hill: 21 Trafalgar Way (S/02273/11)			17,136				6.72	Site for the expansion of Domino Printing Sciences.
Cambourne: Business Park, Plots 3010 & 3030 (S/06196/03)			4,366				1.18	Permission for two research and development buildings within Business Park. This plot is within the land allocated for Cambourne West, which proposes its replacement on the land West of Cambourne (Policy SS/8)
Cambourne: Business Park, Plot 4000 (S/06137/01)		4,978					1.23	Permission for office building within Business Park, not within the Cambourne West site.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Cambourne: Monkfield Park (S/01371/92)		30,102			2,400		6.76	Residue of the Business Park land, B1a use within the Business Park and B2 use north of Sheepfold Lane. The B1a use (30,102 sqm, 6.16 ha) is within the land allocated for Cambourne West, which proposes its replacement on the land west of Cambourne (Policy SS/8).
Coton: Greys International Playfield Works, Whitwell Way (S/00516/09)					628		0.00	Expansion within existing factory site.
Croxton: Whitehall Farm, Cambridge Road (S/00692/10)					616		0.00	Extension within existing site.
Duxford: Chemical works, Ickleton Road (S/01749/06)					12,053		10.45	Construction of a Carbon Fibre Precursor Plant
Fen Ditton: Nursery adjacent Cootes Lane (S/02460/11)						644	0.00	Extension within existing site.
Fulbourn: Plot CPC2, Capital Park (S/01095/12)	4,530						0.78	New office building on Business Park
Gamlingay: Land to South of Station Road (S/01771/08)	3,270						1.13	Mixed residential and employment development site. The proposed new employment adjoins existing Station Road Industrial Estate.
Great Abington: Granta Park (S/01094/11) (S/01095/11) (S/01680/11) (S/02538/11) (S/01365/10) (S/02287/10)			45,148				14.14	Granta Park continue to make a major contribution to the development of the life sciences sector and other advanced technology businesses in the Cambridge sub-region and nationally. Phase 2 will contribute in a very similar way as Phase 1, providing labs and office space.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Hauxton: Bayer Cropscience Ltd, Cambridge Road (S/02308/06)		4,000					0.38	Redevelopment of former industrial site to mixed use residential and employment.
Hildersham: Green Farm, Balsham Road (S/02201/10)						594	0.13	Conversion of farm buildings to warehouse uses.
Hinxton: Mighton Products Ltd, rear of Histon Grange (S/01051/11)						529	0.00	Additional warehouse unit on factory site.
Hinxton: Welcome Trust Genome Campus (S/01204/09) (S/02013/10)			10,706				14.60	Phases 2 and 3 will provide a total of 14,000 sqm of research and development buildings. Some buildings are under construction. <i>Detailed permission for part of phase 3 granted in July 2014 (3294 sqm, 0.2 ha); this building has been deducted from this figure to prevent double counting.</i> Phase 1 completed (12,215 sqm).
Landbeach: Cambridge Research Park, Ely Road (S/00678/12)		10,794	10,795	1,876	3,790	3,790	11.83	Remaining undeveloped plots within existing Business Park. The recent permission was designed to provide flexibility, to accommodate high tech, mid tech and low tech firms, with the flexibility to operate a range of operations from a single building. Mid Tech Space about to begin construction. <i>Detailed permission for plots Y and Z granted in February 2014 (S/2422/13 & S/2423/13); these buildings have been deducted from these figures to prevent double counting.</i>
Landbeach: Rear of Donarbon Ltd, Ely Road (S/01985/10)		1,035			-290		0.77	Offices and workshops for waste management uses.
Over: Norman Way Industrial Estate, Norman Way (S/01595/03)				1,823	3,340	3,340	1.71	Existing industrial estate comprising small industrial units and storage. Plots to rear of site.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Pampisford: Dixon International Group, Brewery Road (S/01067/11)					1,357	-435	0.16	Erection of research and development building, extensions to test building and warehouse
Pampisford: Iconix, Pampisford Park, London Road (S/01363/10)	3,199						1.11	New office units on expanding Business Park.
Sawston: Land at Spicers Ltd (S/00750/01) (S/00069/09) (S/00108/09)		-1,851		7,012	-15,954	22,292	2.85	Former Spicers Ltd site. New warehouse building, under construction. Redevelopment of mixed industrial / office use site now known as Sawston Business Park.
Steeple Morden: 83 Station Road (S/00690/12)				-657			-0.53	Change of use to residential, under construction.
Steeple Morden: Wyndemere Farm, Ashwell Road (S/01172/01) (S/02095/12)		678		242			0.81	Permission for demolition of farm buildings and erection of buildings for business use, under construction.
Swavesey: Buckingway Business Park, Anderson Road (S/00141/11)		1,600		4,400	4,400	4,400	2.73	Business park with a range of industrial and office buildings. One unit remaining on phase 1, Phase 2 land available.
Swavesey: Mill Farm, Middle Watch (S/00703/08)		1,242					0.41	Seven new business units, under construction.
Swavesey: Octagon House, Over Road (S/00184/10)					648		0	Additional workshop and warehouse within existing site.
Toft: Adjacent to Meridian Court, Comberton Road (S/01953/12)		669					0.19	Permission for office building. Same land also has an alternative permission for 3 dwellings (S/0824/12).

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Toft: Grain Farm, Old Farm, Comberton Road (S/00356/11)			763				0.16	Office, laboratory and workshop, under construction.
Waterbeach: Panthers Taxi Site, Convent Drive (S/01150/03)		184	184	184			0.06	Three new business units, one built and two outstanding.
Willingham: The Piggery, Haden Way (S/02059/10)				528			0.28	Conversion of barn to offices, under construction.
'Small Sites' Total of 59 sites where each total floorspace <500m	319	660	428	-1,375	1,775	968	1.17	Some under construction.

TABLE 4.2 – SOUTH CAMBRIDGESHIRE ALLOCATIONS WITHOUT PLANNING PERMISSION (excluding Edge of Cambridge sites in table 3.2)

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Gamlingay: Green End Industrial Estate (PSLP Policy H/1f)	1,674			1,412	-9,795	-2,140	-3.07	The Submission South Cambridgeshire Local Plan proposes residential reuse of this industrial site, the site with some new B1 employment uses. The figures reflect the anticipated gain in B1 employment, as well as the loss of B2/B8.
Longstanton: North of Hattons Road (Policy SP/12a)			12,500				6.30	Allocation in adopted Site Specific Policies DPD, proposed to be carried forward to Local Plan. Floorspace is based on previous planning permission which has lapsed.

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Northstowe Phase 1 (S/00388/12)	6,370				5,096	1,274	3.64	<p>The planning application states that phase 1 will provide 12,740 sqm of B1, B2 and B8 uses. The Planning Statement says that 5 ha of employment land is proposed on the northern edge of the site and the proposed indicative employment mix is as follows: B1 (offices) – 50% (1.82 ha), B2 (general industrial) – 40% (1.46 ha), B8 (storage and distribution) – 10% (0.36 ha), Household recycling centre (1.25 ha), foul water pumping station (0.12 ha). <i>Outline planning permission for phase 1 was granted in April 2014.</i></p> <p><i>Site did not have planning permission at 31 March 2013 so shown as an allocation without planning permission.</i></p>

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Northstowe Phase 2 and beyond	43,115				9,552	13,374	15.00	<p>The Planning Application for Phase 2 has been submitted, which includes the town centre. The Design & Access Statement for Phase 2 states that "employment within the town centre is likely to consist of a mix of offices, research and development and light industrial uses" and that B1 employment totals 21,200 sqm located in town centre, consisting of 16,200 sqm of office and 5,000 sqm of light industrial. The town centre consists of 78,700 sqm of non-residential uses and covers 9.3 ha. It anticipates development heights up to 5 storeys. Inclusion of these figures in this table is for information, and is without prejudice to the Council's views on the application.</p> <p>Northstowe future phases will include further employment development. The development Framework Plan anticipates an employment area south of the town centre. The nature and scale of floorspace will be determined through the planning application process. The land area reflects the remainder of the 20 hectares equivalent envisaged by the Northstowe Area Action Plan. The floorspace figures are estimates.</p>
Pampisford: Eastern Counties Leather (Policy SP/12b)	3,780						1.18	Residue of site allocated in the Local Development Framework, and proposed to continue to be allocated in the Local Plan, to the rear of existing industrial estate. This part of site does not yet have planning permission, and floorspace is estimated.

Allocations without Planning Permission	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
Papworth Everard: Papworth Business Park (Policy SP/13b) (S/01079/13)						10,591	2.20	Last plots of recently developed business park comprising offices, industry and storage uses. <i>Planning permission (S/1079/13) granted in September 2013 for a 10,591 sqm warehouse.</i> <i>Site did not have planning permission at 31 March 2013 so shown as an allocation without planning permission.</i>
Papworth Everard: Papworth Hospital Site (Policy SP/10(1))								Papworth Hospital is due to move to the Addenbrookes Site in Cambridge. Employment provision is subject to policy SP/10, which seeks healthcare uses first, therefore no employment uses are assumed as this stage.
Sawston: Dales Manor Business Park (PSLP Policy H/1a)	2,790				-8,328	-8,328	-9.00	The Submission South Cambridgeshire Local Plan proposes residential reuse of the site with some employment uses on this current industrial estate. The figures reflect the anticipated gain in B1 employment, as well as the loss of B2/B8.
Waterbeach: Land north of Waterbeach (PSLP Policy SS/5)								The Employment associated with the new town will be determined through an Area Action Plan.
Bourn Airfield (PSLP Policy SS/6)								Additional employment for Bourn Airfield New Settlement to be determined through the Area Action Plan. <i>Permission (S/1020/13) for demolition and replacement of 15,972 sqm B2 and 1500 sqm B8 on former Thysenn Krup / TKA Tallent site granted in December 2013 included in table 5.3.</i>

TABLE 4.3 – SOUTH CAMBRIDGESHIRE SUMMARY (excluding Edge of Cambridge sites)

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Planning permission	11,318	55,441	94,298	13,515	15,281	36,122	80.63
Allocation without planning permission	57,799	0	12,500	1,412	-3,475	14,771	16.25

TABLE 5.1 - CAMBRIDGE CITY - PLANNING PERMISSIONS GRANTED SINCE 1 APRIL 2013

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
<i>Cambridge: The Edinburgh Building, Shaftesbury Road (C/00492/14)</i>		34,084					2.67	Approved subject to signing of a s106 agreement. Demolition of existing buildings and erection of office development of up to 41,750 sqm and ancillary facilities to serve as the new office campus headquarters for Cambridge Assessment.

TABLE 5.2 – SOUTH CAMBRIDGESHIRE - EDGE OF CAMBRIDGE PLANNING PERMISSIONS GRANTED SINCE 1 APRIL 2013

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
<i>Cambridge Science Park (Existing Permissions) (S/00179/13) (S/01650/13) (S/02347/12)</i>		6,900	6,900		2,515	1,648	2.23	Outline permission for B1a/B1b (offices/high technology) buildings on three sites totalling 13,800 sqm was granted in July 2013, and detailed planning permission for one site was granted in October 2013. Exact breakdown between uses unknown so divided equally between the two possible uses. Extension to production and warehouse building at Napp Pharmaceuticals (B2 & B8 uses, 4,163 sqm) within existing site.
<i>Cambridge: St Johns Innovation Park (S/01510/12)</i>		4,423					0.60	Permission granted in February 2014 for office building.

TABLE 5.3 – SOUTH CAMBRIDGESHIRE - PLANNING PERMISSIONS GRANTED SINCE 1 APRIL 2013 (excluding Edge of Cambridge)

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
<i>Bourn Airfield (PSLP Policy SS/6) (S/01020/13)</i>					-1,006		0.00	Permission (S/1020/13) for demolition and replacement of 15,972 sqm B2 and 1500 sqm B8 on former Thysenn Krup / TKA Tallent site granted in December 2013. Existing buildings have been demolished.
<i>Babraham: Babraham Research Campus (S/00616/13) (S/02688/13)</i>			5,038				1.53	Detailed planning permissions granted in June 2013 and March 2014 for research and development buildings. NOTE: New pending planning application (S/1676/14) for 10,000m2 of B1b on adjoining land for offices and lab space.
<i>Bar Hill: Units 2-5 Trafalgar Way (S/02551/12)</i>					3,075	-3,075	0.00	Planning permission granted in April 2013 for change of use to allow relocation of the print works 'arm' of Cambridge University Press which currently operates from Shaftesbury Road, Cambridge
<i>Duxford: Duxford Airfield (S/00443/14)</i>					1,447		0.60	Permission granted in May 2014 for the erection of a hanger for aircraft repair and restoration.
<i>Great Abington: Granta Park (S/02466/12)</i>			18,583				12.30	Permission was granted in June 2013 for the redevelopment of TWI site to create a series of new buildings (totalling 31,460 sqm) for B1(b)/D1 uses following the phased demolition of existing buildings on the site (12,877 sqm). The primary operational and functional characteristics of TWI will remain unchanged being essentially a Research and Development B1(b) Use.

Planning Permissions	Floorspace (sqm)						Land Supply (ha)	Comments & Constraints
	B1	B1a	B1b	B1c	B2	B8		
<i>Hinxton: Welcome Trust Genome Campus (S/01099/14)</i>			3,294				0.20	Detailed permission for part of phase 3 granted in July 2014.
<i>Landbeach: Cambridge Research Park, Ely Road (S/02422/13) (S/02423/13)</i>		5,125	5,125	1,914			3.89	Mid Tech Space about to begin construction. Detailed permission for plots Y and Z granted in February 2014 (S/2422/13 & S/2423/13).
<i>Over: Norman Way Industrial Estate, Norman Way (S/01431/13)</i>				517	517	517	0.46	Permission granted in September 2013 for 8 units to provide a total of 1,551 sqm of B1c, B2 & B8, exact breakdown between uses unknown so divided equally between the three possible uses.
<i>Stapleford: Granta Terrace (S/01725/12)</i>		-650					-1.63	Permission granted in August 2013 for redevelopment of Welch's Transport Group headquarters site for housing development. Site relocated to new site in Whittlesford Bridge.
<i>Whittlesford Bridge: Moorfield Road (S/01726/12)</i>					1,128	3,806	3.85	Permission granted in August 2013 for new facilities for Welch's Transport Group incorporating storage and distribution building and vehicle sales, service, MOT and repair building.

TABLE 5.4 - PLANNING PERMISSIONS GRANTED SINCE 1 APRIL 2013 SUMMARY

Summary	Floorspace (sqm)						Land Supply (ha)
	B1	B1a	B1b	B1c	B2	B8	
Cambridge Urban Area	0	34,084	0	0	0	-9,474	2.67
Edge of Cambridge	0	11,323	6,900	0	2,515	1,648	2.83
South Cambridgeshire (excluding Edge of Cambridge)	0	4,475	32,040	2,431	5,161	-1,352	21.20

Employment Completions 2011 – 2013

Information from the Councils responsive Annual Monitoring Reports

TABLE 6.1 - CAMBRIDGE – COMPLETIONS 2011 - 2013

Summary	Floorspace (sqm)						Land (ha)
	B1	B1a	B1b	B1c	B2	B8	
2011 / 12	-224	-1935	9179	-4695	-425	912	-7.31
2012 / 13	0	2339	0	-1574	-1170	-161	-2.34

Source: Cambridge Annual Monitoring Report 2013 (RD/AD/350) & 2012 (RD/AD/340)

TABLE 6.2 – SOUTH CAMBRIDGESHIRE – COMPLETIONS 2011 - 2013

Summary	Floorspace (sqm)						Land (ha)
	B1	B1a	B1b	B1c	B2	B8	
2011 / 12	0	-5057	5461	-104	-6178	2520	23.4
2012 / 13	4467	-1699	463	-3717	-688	2623	1.91

Source: South Cambridgeshire Annual Monitoring Report 2014 (RD/AD/270)

Figure 4.30: Net amount and type of completed employment floorspace (sqm) (Indicator CO-BD1ii)

Figure 4.31: Net amount and type of completed employment land (ha) (Indicator LOA10ii)