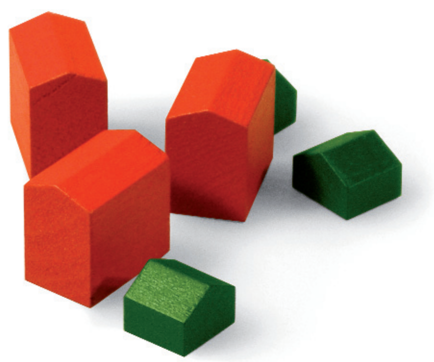
CAMBRIDGE
CITY COUNCIL

South
Cambridgeshire
District Council

Cambridge City and South Cambridgeshire

EMPLOYMENT LAND REVIEW

July 2008



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EXECUTIVE SUMMARY

Introduction

1 Cambridge City Council and South Cambridgeshire District Council have undertaken an employment land review to provide an evidence base for employment land policies and allocations for the proposed Local Development Frameworks (LDF) Development Plan Documents.

2 In accordance with the Government's guidance note, 'Employment Land Reviews,' this report provides a technical supporting document for the 'Core Strategy' and other development plan or supplementary planning documents. In particular the report provides an accessible supporting document for the 'Preferred Options' consultation.

The Review

3 The report begins with a review of Government's guidance for undertaking employment land reviews and relevant national, regional and local planning and economic development policies. The policy lens for the review was created by combining three dominant policies:

i) market regulation: to identify an adequate supply of sites to meet indicative job growth targets and safeguard and protect these sites from competition from other higher value uses, particularly housing;

ii) selective management: to reserve land, in and close to Cambridge, for development which can demonstrate a clear need to be located in the area to serve local requirements or contribute to the continuing success of the sub region as a centre of excellence and world leader in the fields of higher education and research and further expansion of the knowledge based economy; and

iii) sustainable development and climate change: to prepare and deliver spatial strategies which:

make the most of the development potential of land, starting with the built up area of Cambridge and ending, sequentially, with the sub region's key service centres,

secure the highest viable standards of resource and energy efficiency and reduction in carbon emissions; and

deliver patterns of urban growth that help secure the fullest possible use of sustainable transport and overall reduce the need to travel by car.

4 In Stage One of the review, the analysis of land stock and revealed demand identified three property market sub areas:

- Cambridge as an area of high demand for housing, leisure and retail uses and hence the need to safeguard existing employment sites in the face of competing higher value uses; and

- North and West of Cambridge where demand is highest on the periphery and close to Cambridge and development is characterised by low density schemes for knowledge intensive R&D (B1 b) and office (B1 a) users; and

- South and East of Cambridge where demand is being met through secure sites for bio medical and bio technology R&D (B1 b) users.

5 In Stage Two of the review, the Councils were concerned to identify sufficient net additional employment land to:

- provide for the nineteen year period 2007 – 2026 in order to complement the advice in PPS3 and from the Government Office for local authorities to identify a seventeen year supply of housing land from 2009 (when it is anticipated the Cambridge City LDF will be adopted); and

- accommodate jobs (in sectors requiring property within B1, 2 and 8 use classes) in accordance with the RSS indicative target for growth in net jobs (which is for 49,390 jobs in Cambridge and South Cambridgeshire for the period 2001 – 2021).

6 The Councils applied three methodologies to quantify future employment land requirements: property demand analysis based on the past take up of previously undeveloped employment land and property 1998 – 2006; labour supply (demographic) and demand (econometric) forecasts for 2001 – 2021 and scenario building.

7 The Council's application of the three methodologies resulted in a wide range of employment land requirements for the period 2009 – 2026. These results highlighted the sensitivity of different assumptions underlying the three methodologies. The analyses concluded with three scenarios of future patterns of demand for employment land including a 'Low Congestion/ Low Carbon Future.'

8 To involve stakeholders and a build a consensus concerning the review, the Council held a seminar in May 2007 to debate issues concerning some of the key employment land planning questions for Cambridge and South Cambridgeshire.

9 At the seminar the stakeholders reached a consensus on two questions: the need to safeguard employment land in Cambridge and the need for low cost public transport services to support policies aimed at reducing car based travel. The stakeholders adopted alternative market and policy led standpoints on a further two questions:

i) upholding car parking standards to reduce car usage in the City centre versus relaxing car parking standards to encourage office development in the City centre; and

ii) promoting an integrated approach to attracting inward investment to Northstowe, developing a skilled workforce and linking together the provision of employment with housing and sustainable transport versus doing nothing as interventions increase investors' risks and costs.

10 Following the seminar, Cambridge City Council wrote to landowners and agents inviting them to put forward sites to be considered for future employment development.

11 In Stage Three, the Councils devised and applied qualitative site appraisal criteria to identify land for release and to be brought forward for development. Through these assessments, the Council identified options to release land from the portfolio and bring forward development on sites with the most potential for sustainable development.

12 Through the employment land review the Councils have:

i) identified existing sites to be retained and to be released:

- 89 established employment sites were identified for safeguarding for future employment use in support of regional and local strategies for economic development and regeneration;

- 4 sites were identified for release of which three have potential for housing.

ii) quantified sufficient land to meet expected needs for industrial and commercial development in the context of the RSS indicative target for net growth in jobs:

- the B use floorspace required to meet the RSS indicative target for net growth in jobs was estimated to range between 412,000 – 462,000 sq m on 73 – 96 ha (for the period 2007 – 2026);

- the supply of previously undeveloped employment land to meet this requirement was calculated to be 648,250 sq m on 139 ha with a further 199,500 sq m on 37.4 ha facing planning or development constraints;

- the need for a larger margin of employment land was established in order to ensure the availability of a sufficient quantity, quality and choice of sites throughout and beyond the plan period (with specific reference to the ICT and computing services high technology cluster as well as essential services and prime offices in Cambridge).

iii) identified sites of suitable quality in the right locations taking into account accessibility and sustainable transport needs and the provision of essential infrastructure:

- landowners, agents and Cambridge City Council nominated 13 sites to be considered for future employment development;

- of these sites 8 were identified for consultation as options for employment allocations with a development potential of over 61,700 sq m (excluding one site already included in the constrained land) and a further 6.64 ha of land for depots and a waste recycling facility.

INTRODUCTION TO THE CAMBRIDGE CITY AND SOUTH CAMBRIDGESHIRE EMPLOYMENT LAND REVIEW

1.1 The purpose of this report is to provide a technical supporting document for the Councils' Core Strategies and other development plan or supplementary planning documents. In particular the report provides an accessible supporting document for Cambridge City Council's 'Preferred Options' consultation.

1.2 To undertake the review, Cambridge City Council and South Cambridgeshire District Council commissioned Warwick Business Management Limited to facilitate a corporate and partner wide approach with inputs from the Councils' planning, policy and economic development services, Cambridgeshire County Council and business and property sector stakeholders.

1.3 In accordance with the practice of 'frontloading,' the Councils consulted stakeholders at a seminar on 22nd May 2007 on issues arising from the review. Cambridge City Council later invited landowners and agents to nominate potential City sites the Council should consider in developing its Core Strategy for employment uses.

1.4 The review was undertaken in parallel with, and took into account, the Cambridge Strategic Housing Land Availability Assessment (SHLAA). This approach enabled Cambridge City Council to use contributions from a wide range of stakeholders and the emerging findings on land availability and suitability to inform both the review and SHLAA. This is a process being used widely by Councils as part of Local Development Framework (LDF) evidence gathering.

1.5 The report concludes with options to release land from the portfolio and bring forward development on sites with the most potential for sustainable development.

2 POLICY BACKGROUND TO THE EMPLOYMENT LAND REVIEW

Introduction

2.1 To set the review in its policy context, the Government's guidance for undertaking employment land reviews (ELR) is summarised along with relevant national, regional and local planning and economic development policies drawn from:

- The Secretary of State's Proposed Changes to the Draft Revision to the Regional Spatial Strategy (RSS);
- The Regional Economic Strategy (RES);
- County Structure Plan (in so much as the policies are saved following the adoption of the RSS in 2008);
- Local Plans and LDF documents; and
- The Councils' corporate and economic development strategies.

2.2 The review concludes by highlighting the dominant policies which together create the policy lens through which to undertake the employment land review.

The Government's Guidance

2.3 Through its guidance, the Government introduced a robust three stage approach which reflects the underlying principles of the new planning system with its greater stress on sustainability and proactive management of development:

Stage One: take stock of the existing situation, including an initial assessment of the 'fitness for purpose' of existing allocated employment sites;

Stage Two: assess, by a variety of means (i.e. economic forecasting, consideration of recent trends and/ or assessment of local property market circumstances) the scale and nature of likely demand for employment land and available supply in quantitative terms;

Stage Three: undertake a more detailed review of site supply and quality and identify and designate specific new employment sites in order to create a balanced local employment land portfolio.

2.4 The Guidance adds that "an important objective of the new development plans is to deliver an appropriate local balance between competing uses for land, particularly housing and employment. The market alone will not necessarily deliver that balance, particularly where land values for housing are substantially higher than those achievable for employment uses" (ODPM, 2004: 4).

2.5 In this context, the objective of the Guidance is to make sure that Local Planning Authorities review their portfolios of employment sites and apply up to date and sensible criteria in terms of sustainable development and market realism. Local Planning Authorities are encouraged to:

> " identify a robust and defensible portfolio of both strategic and locally important employment sites in their LDF's and, where appropriate, to safeguard both new and existing employment areas for employment rather than other uses" (ODPM, 2004: 5).

2.6 Elsewhere in the Employment Land Review Guidance Note, the Government refers to draft PPS 1 and states specific objectives for delivering sustainable development include the promotion of regional, sub regional and local economies through a positive planning framework and by:

> "bringing forward sufficient land of a suitable quality in the right locations to meet expected needs for industrial and commercial development, to provide for growth and consumer choice, taking into account accessibility and sustainable transport needs and the provision of essential infrastructure" (ODPM, 2004: 4 - 5).

2.7 The Guidance advised that reviews focus on those employment land uses or premises which are within the scope of PPG4, specifically:

- offices, both in town centres and elsewhere, including those for public administration;
- light and general industry;
- wholesale and freight distribution;
- high technology premises, including research, business and science parks; and
- other 'specialised' employment requirements including large scale employers, creative industries, transport uses related to ports, airports and other inter modal freight terminals, related specialist waste facilities, and replacement sites for 'bad neighbour' and 'low value' industrial uses which may be displaced from existing sites.

2.8 The Government recently published consultation PPS4 : Planning for Sustainable Economic Development is summarised in section 2.22 below.

2.9 The Guidance notes: 'the continuing shift from manufacturing to service employment and the emphasis on sustainable and mixed use development means that many of the sites which are most suitable for employment development are in or on the edge of town centres' (ODPM, 2004: 10).

2.10 This review follows this guidance and concludes with the identification and ranking of possible employment land allocations for sustainability appraisal and community involvement in accordance with further Government guidance (in Planning Policy Statement 12: Local Development Frameworks (ODPM, 2004)) on the preparation of and participation on preferred options).

Government Planning Policy Statements and Guidance (PPS's & PPG's)

2.11 *Planning Policy Statement 1* sets out the Government's aims for sustainable development and expects that the planning system should facilitate and promote sustainable and inclusive patterns of urban and rural development by a number of means including:

- making suitable land available for development in line with economic, social and environmental objectives to improve people's quality of life;
- contributing to sustainable economic growth;
- protecting and enhancing the natural and historic environment;
- ensuring that development supports existing communities….with good access to jobs and key services for all members of the community.

2.12 PPS1 sets out the Government's commitment to promoting a strong, stable and productive economy and requires Local Planning Authorities, among other things, to:

- recognise that economic development can deliver environmental and social benefits;
- recognise the wider sub regional, regional and national benefits of economic development and consider these alongside any adverse local impacts; and
- ensure that suitable locations are available for industrial, commercial, retail, public sector, tourism and leisure developments; and
- provide for improved productivity, choice and competition, particularly when technology and other requirements of modern business are changing rapidly.

2.13 *Proposed Planning Policy Statement Planning and Climate Change* This consultation PPS, when finalised, will supplement PPS1 by setting out how planning should contribute to reducing emissions and stabilising climate change (mitigation) and take into account the unavoidable consequences (adaptation).

2.14 The Government believes that climate change is the greatest long – term challenge facing the world today. Addressing climate change is therefore the Government's principal concern for sustainable development. In this context, the Government has set a long term ambition to reduce carbon dioxide emissions by some 60% by about 2050.

2.15 In the proposed PPS, the Government sets out seven key planning objectives that all planning authorities should prepare and deliver spatial strategies that, among other things:

- in making the provision of new homes, jobs, services and infrastructure and shaping the places where people live and work, secure the highest viable standards of resource and energy efficiency and reduction in carbon emissions;
- deliver patterns of urban growth that help secure the fullest possible use of sustainable transport for moving freight, public transport, cycling and walking; and overall reduce the need to travel, especially by car; and
- respond to the concerns of business and encourage competitiveness and technological innovation.

2.16 In addition, the Government states that all planning authorities should adhere to eight principles in preparing and delivering spatial strategies:

- spatial strategies should be in line with the Key Planning Objectives set out in the PPS;
- the planned provision for new development and its spatial distribution should contribute to mitigating climate change through improvements in carbon performance;
- substantial new development should be expected to consider and take into account the potential of decentralised energy supply systems based on renewable and low – carbon energy;
- new development should be located and designed for the climate, and impacts, it is likely to experience over its intended lifetime;
- climate change considerations should be integrated into all spatial planning concerns, including transport, housing, economic growth and regeneration, water supply and waste management, and not considered separately;
- mitigation and adaptation should not be considered in isolation of each other, and opportunities for their integration in the development of spatial strategies, and their delivery, should be maximised;
- sustainability appraisal should be applied so as to shape planning strategies and policies that support the Key Planning Objectives set out in the PPS.

2.17 *Planning Policy Statement 11* states that the Regional Spatial Strategy (RSS) should be consistent with and supportive of other regional frameworks and strategies including the implementation of the Regional Economic Strategy (RES).

2.18 As a minimum the RSS should:
- identify the regional or sub regional priority areas for economic development and regeneration;
- include, where appropriate, provision for the location, expansion and promotion of clusters or networks of knowledge driven industry;
- ensure that regionally or sub regionally significant housing, transport and other infrastructure proposals support the above priorities; and
- advise on the need for simplified planning zones and on the general locations and criteria for strategic site selection.

2.19 *Planning Policy Statement 12* PPS 12 sets out the Government's policy on the Development Plan Framework. As part of the guidance PPS 12 states that Local Planning Authorities must gather evidence about their area so that the LDF can be evidence based and that it will be used in testing the soundness of the LDF.

2.20 *Planning Policy Guidance Note 4* PPG 4 takes a positive approach to the location of new business developments. It is predicated on the premise that economic growth and a high quality environment must be pursued together. It requires the development plan system to give industrial and commercial developers and local communities greater certainty about the types of development that will or will not be permitted in a given location with policies providing for choice, flexibility and competition. In allocating land for industry and commerce planning authorities are required to be realistic in their assessments of the needs of business and they should aim to ensure that there is sufficient land available which is readily capable of development and well served by infrastructure. The Guidance allows the planning authorities to propose policies aimed at channelling particular types of business development into particular locations although in such cases a clear justification for this is required.

2.21 In May 2004 the Government published a research paper "Planning for Economic Development" which is providing an evidence base for the consultation PPS4 and the main findings of the report concluded that the PPS should include:
- the need for an assessment of the supply and demand of employment land to be coordinated at a regional level;
- guidance on the criteria for assessing need and allocation of employment land, the principle considerations being market realism and sustainability;
- that the assessment should be every three years;
- that there is a need for a wholesale review of employment land allocations as part of reviewing LDFs;
- that land is de allocated or reallocated if there is no realistic prospect for development; and
- that LDF's should safeguard appropriate employment land.

2.22 The Consultation Draft PPS4: Planning for Sustainable Economic Development aims to put in place a national planning policy framework for economic development at the regional, sub – regional and local levels for urban and rural areas. It suggest planning policies must be flexible to respond to the economic challenges and opportunities of globalisation and technological advances. Economic development also needs to be delivered in a way that is sensitive to climate change.

2.23 The document suggests that the following are required to achieve positive planning:

- a good range of sites identified for economic development and mixed use development;

- a good supply of land and buildings which offer a range of opportunities for creating new jobs in large and small businesses as well as start up firms and which are responsive to changing needs and demands.

2.24 Local planning authorities are requested to use a wide evidence base to understand existing business needs and likely changes in the market. The supply of land will need to be able to cater for differing needs of businesses and expected employment needs of the community, but flexible enough to be responsive to a changing economy. Local planning authorities are requested to avoid designating sites for single or restricted use classes wherever possible and avoid carrying forward existing allocations where it cannot be justified. Local planning authorities are requested to make the most efficient and effective use of land and buildings, especially vacant or derelict buildings.

Regional Policy Context

2.25 *The Draft Revision to the Regional Spatial Strategy for the East of England (RSS)* This strategy has been prepared to guide development in the East of England to 2021. The document has been through an Examination in Public (EIP). The Secretary of State published proposed changes to the plan late in 2006 which have been the subject of consultation. These changes provide for an additional 508,000 dwellings and 452,000 jobs in the region between 2001 and 2021. The final RSS was adopted by Government in 2008.

2.26 A basic policy stance in both the RSS and the RES documents is to take account of the ‘alignment’ or balance between homes and jobs, and to seek as far as possible to ensure that development results in better, not worse alignment. Another important thread is, whilst securing continued economic growth in prosperous areas, to redress spatial imbalances in prosperity and quality of life by increasing the economic strength of currently under – performing areas.

2.27 The RSS states that job growth in the region will be needed partly to support the region’s key economic sectors with much of this growth forecast to be concentrated where sectors and clusters already exist particularly in Hertfordshire, the Cambridge sub – region and parts of west Essex. The RSS continues that indicative targets for net job growth for the period 2001 – 2021 (see Policy E1 below) should inform employment land reviews and continues:

- the quality of land to meet the needs of business is one of the critical factors in ensuring economic success and attracting inward investment. Local Development Documents (LDD's) will ensure that there is a high quality offer of employment land, taking account of the contribution that can be made by strategic and sub – regional employment sites and the need to provide the levels of job growth roughly in line with Policy E1;

- allocations can help to promote more sustainable communities directly by redressing an imbalance between the availability of local workers and local jobs (and hence the need to travel) or more indirectly such as through town centre office development supporting town centre shops and the leisure economy; and

- surplus employment land may be released for housing (or other pressing development needs) in line with PPS3. However it will be important to base decisions on sound evidence. Land that is most likely to be needed for employment should be safeguarded against other development pressures (GO East, 2006, East of England Plan: 106).

2.28 The most relevant RSS policies (with the Secretary of State's proposed changes) to employment land reviews are Policy E1, E2, E3 and E 4.

2.29 *Policy E1 Job Growth 2001 – 2021* This policy states 'The following indicative targets for net growth in jobs for the period 2001 – 2021 are adopted as reference values for monitoring purposes and guidance for regional and local authorities, EEDA and other delivery agencies in their policy and decision making on employment matters. LDD's should provide an enabling context to achieve these targets. They may be revised through the review of RSS in conjunction with review of the RES or, exceptionally, through testing as part of LDD preparation.'

2.30 The targets are for net growth in jobs of 75,000 for Cambridgeshire and 20,000 for Peterborough for the period 2001 to 2021.

2.31 *Policy E2 Provision of Employment Land:* This policy states 'LDD's should ensure that an adequate range of sites / premises (including dedicated land /sites within mixed use areas and town / district centres) is identified and then subsequently allocated, safeguarded and / or protected to meet the full range of sectoral requirements needing to be accommodated to meet indicative job growth targets of Policy E1 and needs of the local economy as revealed by up to date employment land reviews.'

2.32 Where development proposals and issues cross local authority boundaries this approach should be developed and applied across the whole urban or development area.

2.33 Sites of sufficient range, quantity and quality to cater for all relevant employment sectors should be provided at appropriate scales at urban areas, market towns and key centres. These should be at locations which:

- minimise commuting and promote more sustainable communities by achieving a closer relationship between jobs and homes;
- maximise potential use of public transport;
- minimise loss of, or damage to, environmental and social capital, and where necessary substitute for any losses and secure positive enhancements. This will often mean giving precedence to the re - use of previously developed land and the intensification of use within existing sites over the release of green field land;
- meet the needs of the region's significant sectors and clusters set out in the RES or identified through LDD's; and
- provide appropriately for identified needs for skills – training and education.

2.34 Paragraph 4.9 of the draft RSS sets out the key policy principles for the spatial strategy including:

- fostering and developing European and interregional links;
- recognising the impact of London's world city role;
- addressing the issues of major economic growth focused on Stansted airport and the M11 corridor;
- the major role for key centres throughout the region including Cambridge; and
- a reaffirmation of the importance of all the regeneration areas including parts of Cambridge.

2.35 *Policy E3 Regionally Strategic Employment Locations:* This policy states, 'LDD's should identify readily – serviceable regionally strategic employment sites of the quality and quantity required to meet the needs of business as identified through employment land reviews referred to in Policy E2. Such sites should be provided particularly (but not exclusively) at the following regionally strategic employment locations, including among others, Cambridge sub region, to secure its full potential as a centre for world – class research and development.'

2.36 The RSS notes that regionally strategic sites are needed for the reasons in Policy E3. In some areas appropriate land has already been allocated and the need is to safeguard and promote its use or redevelopment for appropriate employment purposes. In other areas additional employment sites will need to be allocated in LDD's.

2.37 *Policy E 4 Cluster Development:* The policy states LDD's should support the sustainable and dynamic growth of inter – regional and intra – regional sectors and business clusters, especially the regionally significantly clusters including, among others:

- a life science regional super cluster with concentrations in the Cambridge sub – region, Hertfordshire, Cranfield and Norwich;
- an environmental technologies cluster stretching from Essex to Cambridgeshire with a particular focus on Peterborough;
- a multimedia cluster from London through Hertfordshire to Norfolk; and
- a strong ICT cluster in the Cambridge area.

2.38 LDD's will also support, and if necessary provide specific guidance for, locally important clusters defined by local economic partnerships in collaboration with local authorities and EEDA.

2.39 Support for clusters will be demonstrated by:

- ensuring the availability of a sufficient quantity, quality, and choice of sites including provision for incubator units, grow – on space and larger facilities for established business clusters;
- addressing accommodation needs immediately adjacent to or close to key institutions, including higher education and university facilities; and
- addressing the need for user restrictions to secure the use of premises for specific purposes.

2.40 The RSS notes the continued economic success of the Cambridge sub – region, focused on education, research and knowledge – based industry, is of great significance to the wider region and nationally. It notes that strategy in the Cambridgeshire and Peterborough Structure Plan 2003 (which aimed to provide for a sustainable pattern of development to accommodate necessary growth in the sub region, with a better balance between employment and housing focused on Cambridge and the surrounding area) is carried forward largely unchanged into the RSS.

2.41 *CSR 1 Strategy for the Sub Region:* The vision for the Cambridge sub – region to 2021 and beyond is that it should continue to develop as a centre of excellence and world leader in the fields of higher education and research, and will foster dynamism, prosperity and further expansion of the knowledge – based economy spreading outwards from Cambridge. The historic character and setting of Cambridge should be protected and enhanced, together with the character and setting of the market towns and other settlements and the important environmental qualities of the surrounding area.

2.42 A comprehensive approach should be adopted to secure the necessary infrastructure (including green infrastructure) to support the development potential of land in the following order of preference:

- in the built up area of Cambridge, subject to considerations of environmental capacity;
- on the periphery of the built up area of Cambridge, on land released from the Green Belt following the Cambridgeshire and Peterborough Structure Plan 2003 and through the Cambridge Local Plan and LDD's prepared by the local planning authorities;
- at the new settlement of Northstowe, linked to the guided busway; and
- on land within or on the peripheries of the sub region's market towns and within key service centres (or the peripheries of key service centres, mainly linked to existing commitments), where such development would contribute to the social and economic needs of the community and good public transport exists or can be provided.

2.43 *CSR2 Employment – Generating Development:* This policy refers to employment land in and close to Cambridge being reserved for development which can demonstrate a clear need to be located in the area to serve local requirements or contribute to the continuing success of the sub region as a centre of high technology and research.

2.44 Employment related development must demonstrate they fall into one of 3 categories:

- high technology and related industries and services concerned primarily with research and development;
- other small scale industries contributing to a greater range of local employment opportunities; and
- provision of offices or other development providing essential services to Cambridge as a local or sub regional centre

2.45 The RSS adds that successful implementation of the development strategy for the Cambridge sub – region relies on integration of development with new and upgraded transport infrastructure. Central to this is the provision of high quality public transport, in particular the Cambridgeshire guided bus, and improvements to the strategic and local road network. It counsels, there should be a strong emphasis on public transport, demand management and traffic restraint taking full advantage of likely sources of funding, including the Transport Innovation Fund and developer contributions (GO East, 2006: 200).

2.46 The RSS states that LDD's should take into account and facilitate the delivery of the 2004 RES and its subsequent reviews, putting in place complementary land use policies and proposals. The 2004 RES sets out how sustainable economic growth is to be achieved to support the East of England Plan.

2.47 The *Regional Economic Strategy* sets a vision for the region as 'a leading economy, founded on our world class knowledge base and the creativity and enterprise of our people, in order to improve the quality if life of all who live and work here.' To realise this vision, the RES sets out eight strategic goals:

- a skills base that can support a word class economy;
- growing competitiveness, productivity and entrepreneurship;
- global leadership in developing and realising innovation in science, technology and research;
- high quality place to live, work and visit;
- social inclusion and broad participation in the regional economy;
- making the most from the development of international gateways and national and regional transport corridors;
- a leading information society;
- an exemplar for the efficient use of resources

County and Sub Regional Context

2.48 *Cambridgeshire and Peterborough Structure Plan 2003:* The Structure Plan provides a vision for the Cambridge Sub region to "continue to develop as a centre of excellence and world leader in the fields of higher education and research and foster dynamism, prosperity and further expansion of the knowledge-based economy" by, among other things, supporting the expansion of high technology industries.

2.49 This document has been superseded following the adoption of the draft RSS although it should be noted that it forms the policy background from which the Cambridge Sub Region section in the draft RSS was written.

Policy P9/2c sets out the location and phasing of development land to be provided through Local Plans for housing and mixed use development.

Policy P9/6 supports the development and expansion of high technology clusters in the Cambridge sub region by making specific provision for development of the following categories:

- Biotechnology;
- Computer services;
- Electronic engineering;
- Information technology/telecommunications;
- Medicine;
- Research and development; and
- Other high technology clusters as they emerge

Policy P9/7 establishes the concept of selective management of employment development by requiring that employment land in and close to Cambridge is reserved for development that can demonstrate a clear need to be located in the area in order to serve local requirements or contribute to the continuing success of the Sub region as a centre of high technology and research. Development has to fall within one of the following categories:

- high technology and related industries and services concerned primarily with research and development including D1 educational uses and associated sui generis research institutes, which can show a special need to be located close to the Universities or other established research facilities;
- other smaller scale industries which would contribute to a greater range of local employment opportunities; and
- the provision of office or other development providing an essential service for Cambridge as a local or sub regional centre.

2.50 The Structure Plan includes employment and labour supply forecasts for the period 2001 to 2016. These forecasts suggest that between 2001 and 2016, 63,800 additional jobs will be created and that 54,600 people will be in or looking for work. An estimated 49,300 of these additional jobs are expected to occur in the Cambridge sub region.

Cambridgeshire and Peterborough Employment and Resident Labour Supply Forecasts 2001 – 16

	Employment	Labour Supply	Difference (jobs to labour)
2001	378,600	384,700	- 6,100
2016	442,400	439,300	3,100
Change	63,800	54,600	9,200

2.51 The changing balance between labour demand and supply is explained in part by: 'double jobbing' accounting for 5% of employment in some areas; rising economic activity rates among people aged over 50 and cross border commuting.

2.52 Three features of the employment forecast raise issues for the translation of the RSS jobs target into employment land:

- the growth in jobs was expected mainly in service sectors, which accounted for 77% of employees in the Plan areas in 2003
- of the 63,800 net 'extra' jobs forecast, almost 36,000 were predicted to be for part time employees (56%); and
- the growth in computing services employment – from 9,400 jobs in 2001 to over 32,200 in 2016 - was anticipated.

2.53 *Cambridge City Local Plan 2006* The City Council produced a deposit draft Local Plan in 2003 which has been through two formal deposit periods and a Local Plan Inquiry in September 2005. The Plan, which was adopted in July 2006, will be "saved" until 2009 during which time the City Council will bring forward its LDF.

2.54 The objectives in the Local Plan 2006 which relate to the ELR (working and studying) are:

- to promote economic growth in sustainable and accessible locations;
- to promote the growth of and linkages between employment clusters such as high technology/biotechnology/ICT/ and higher education;
- to recognise innovation and enable Cambridge's role as a world leader in higher education, research and knowledge based industries;
- to implement the selective management of the economy;
- to protect the best industrial and storage areas and provide a range of new employment land; and
- to maintain and enhance the diversity of jobs available in the City.

2.55 The main thrust of the Local Plan policies relates to the fact that development pressures in and around Cambridge are intense and that the use of land for employment uses (and other uses) needs careful management. The main policies in this Plan are therefore concerned with the selective management of the local economy in order to implement Structure Plan policy P9/7, the continued growth of the City's employment clusters in an environmentally sustainable way and the allocation of land for employment development.

Policy 7/1 identifies the strategic and other employment sites (52 hectares) needed to meet the Structure Plan requirement of 56 hectares for the period 2002-16.These sites are shown on the Proposals Map. The policy also provides for 4 hectares of windfall sites.

Policy 7/2 sets out the policy on selective management of the economy. The policy states that employment development proposals, including change of use, will only be permitted if it can be demonstrated that they will fall into one or more of the following categories:

- the provision of office or other development within Use Class B1(a) providing an essential service to Cambridge as a local or sub regional centre or exceptionally where there is proven need for a regional function;
- high technology and related industries and services within Use Class B1(b) which can show a special need to be located close to the Universities or other established research facilities or associated services in the Cambridge area;
- other Use Class B1(c), B2 and B8 on a limited scale which would contribute to a greater range of local employment opportunities, especially where this takes advantage of, or contributes to the development of, particularly locally based skills and expertise; or
- DI educational and other associated sui generis research uses where it is in the national interest or there is clear supporting evidence of the need for a Cambridge location.

Policy 7/3 protects certain existing B1c, B2 and B8 floorspace identified on the Proposals Map to ensure that there is a diversity of employment opportunity and the provision of the full range of services that the City requires.

Policy 7/4 identifies the clusters of industries that are to be encouraged in Cambridge and the locations considered to be suited to their activities. These clusters/locations include:

- healthcare, biomedical and biotechnology development - on land west of Addenbrookes Hospital;
- higher education and related research Institutes - on land at West Cambridge, North West Cambridge and land west of Addenbrookes;
- computer software and services;
- telecommunications
- other high technology clusters as they emerge.

2.56 The Local Plan also includes a number of other policies related to the employment land needs of the higher education sector. In particular permissive policies relate to faculty development for the University of Cambridge in terms of the development or redevelopment of site in the central area, on identified sites, where smaller sites become surplus, and on the major allocation at West Cambridge, south of Madingley Road. In addition sites are identified for student accommodation or special needs housing for College and University staff. In relation to Anglia Ruskin University policies permit the upgrade and limited further development of the East Road site for university facilities and the Proposals Map shows sites for student hostels.

2.57 The Local Plan identifies several areas of major change at: East Cambridge; the Southern Fringe; the Northern Fringe; Madingley Road/Huntingdon Road; Huntingdon Road/Histon Road and the Station Area. The substantive development of these sites will not be allowed in advance of further policy guidance for each of these sites. It should be noted that the D1 allocations are not within the 56 hectare County Structure Plan guidance. The Local Plan anticipates that the following areas of employment land will be provided:

- 17.37 ha in outstanding permissions;
- 2.23 ha in two earlier allocations and two identified sites;
- 10 hectares at East Cambridge, this land could be located in the City or South Cambridgeshire as part of the 20-25 hectares proposed in the Cambridge East Area Action Plan (strategic employment site);
- 14.4 hectares for biomedical and biotech research and development at the Southern Fringe (strategic employment site), with 10.28 hectares safeguarded until after 2016 for biotech research and development and clinical research;
- Up to 2 hectares for B1, B2 and B8 employment at the Northern Fringe
- 6 hectares for University related sui generis research institutes and commercial research uses within B1b when need is proven at land between Madingley Road and Huntingdon Road (North West Cambridge strategic employment site); and
- land for B1a and B1b employment at the station area.

2.58 The Cambridge Local Plan 2006 (Revised Deposit Draft) was the subject of a Local Plan Inquiry in the autumn of 2005. In the context of meeting the pressing demand for housing in the City the Inspector found that “employment land supply might fall short of the Structure Plan‘s expectations and the Council will have to monitor the rate at which employment land comes forward.”

2.59 *Cambridge City Economic Development Strategy* The City Council published a revised Economic Development Strategy in 2003 for a four year period. The vision for the local economy was for:
“Cambridge as a sustainable City which, building on its strengths, enhances the local, regional, and national economies, its international status, and people’s quality of life”.

The goals of the strategy include:

- wealth and job creation for Cambridge residents and the Cambridge sub region;
- to maintain and enhance quality of life for all sections of the Cambridge community;
- to facilitate the greater involvement of local people in the local economy through maximising training and workforce development opportunities for local people.

2.60 *Cambridge City Community Strategy 2004-2007* The Local Strategic Partnership (LSP) for Cambridge has produced a Community Strategy for the period 2004-07. In the Strategy, the vision for Cambridge is for the City to be:

- a successful City that is vibrant, socially mixed, safe, convenient and enjoyable;

- a City with residents who feel integrated into the life of the City and part of its success; and
- a City that can meet its growing needs without jeopardising the environment or the interests of future generations.

2.61 The Community Strategy recognises that the City is economically buoyant and that its prosperity is increasingly linked to that of the sub region. It also recognises that there is considerable debate about the level of growth of the City but that the regional planning guidance (RPG) and the Structure Plan have put in place the level of growth that will take place. It sees the role of the LSP as ensuring that there are sufficient and appropriate sustainable community based facilities to meet the needs of residents, employees and visitors as the City grows

2.62 *South Cambridgeshire Local Plan 2004* In 2004 South Cambridgeshire District Council (SCDC) adopted its second Local Plan which was to guide development up to 2006. Whilst this has now been superseded by the Local Development Framework Core Strategy it is worth reviewing the Local Plan 2004 as it provides a useful policy background for this ELR.

2.63 The 2004 Local Plan had as an overall strategy for the District to encourage high technology and related industries that are primarily concerned with research and development in the Cambridge area. The land use planning implication of this strategy was that there was a presumption against employment development except for new research development which was to be primarily accommodated “in the northern areas of the district including the expansion of the Cambridge Science Park, employment allocations at Landbeach, Swavesey, and at Cambourne.”

2.64 The Plan established that, because of the economic success of the area, it was important that the Council selectively managed new employment growth that did not need to be located in or close to Cambridge. The 2004 Plan specifically allocated a number of sites for employment uses, these were:

Uses	**Locations**	**Areas**
Class B1	Longstanton Pampisford Hinxton (Genome Campus) Cambourne	6.3 ha 2.3 ha 24,000 sqm 20 ha
Class B1 and B2	Gamlingay Histon Over Papworth Everard	4.05 ha 2.9 ha 1.72 ha 6.55 ha
Class B2	Cambourne	2 ha

2.65 These allocations were in addition to 12.48 ha of land committed for employment purposes in the previous Local Plan and which was still undeveloped. The Plan also noted that these allocations did not include the land reserved on the Cambridge Northern Fringe (Arbury Camp) for employment use, where18,000 sq. m of B1 employment floorspace was allocated.

2.66 *South Cambridgeshire Local Development Framework (LDF*) To replace the Local Plan 2004, SCDC has been preparing its Local Development Framework for South

Cambridgeshire. The LDF comprises a number of Development Plan Documents (DPDs) and in January 2007 the Council adopted the first of these documents which was the Core Strategy DPD. The initial tranche of documents submitted to the Secretary of State in January 2006 included:

- Core Strategy;
- Site Specific Policies;
- Development Control Policies;
- Cambridge East Action Plan;
- Cambridge Southern Fringe Action Area Plan;
- Northstowe Action Area Plan.

2.67 *South Cambridgeshire Core LDF Strategy* The Core Strategy was adopted by the District Council in January 2007. The strategic vision in the Core Strategy for the area includes the statement that the area will:

"contribute to satisfying the development needs of the Cambridge sub region rather than those generated by pressures to the south, or elsewhere;" and

"It will prosper in its own right as a rural district that makes up the largest part of the Cambridge sub region. It will continue to develop as part of the home of the largest cluster of research and development activity in Europe whilst maintaining, and where possible, improving the character, environment, economy and social fabric of its villages and countryside."

2.68 Two of the key strategic objectives of the Core Strategy relate to the provision of employment land. These are to:

- "provide an adequate and continuous supply of land for housing and employment, to meet strategic requirements, in sustainable locations" (ST/a) and

- "support the Cambridge area's position as a world leader in research and technology based industries, higher education and research, particularly through the development and expansion of clusters (ST/h).

2.69 The employment policy in the Core Strategy (ST/8) provides a commitment that sufficient employment land will be available to enable further developments of the high technology clusters and to meet local needs. It provides for additional land to be brought forward for employment development at the strategic employment locations at Northstowe, Cambridge East and Northwest Cambridge which are the sites identified in Policy 2/3 of the Cambridgeshire Structure Plan and is allocated as part of the LDF through the Area Action Plans for these areas.

2.70 *South Cambridgeshire LDF Site Specific Policy Document* This LDF Document provides policies on a number of employment related matters including:

- a housing led mixed use development providing 18,000 sq m B1 development (on the Cambridge Northern Fringe West /Arbury Camp);
- mixed use development at Chesterton sidings;
- mixed use development on land at Bayer Cropscience plc, Hauxton (for B1 and housing);
- the re-use and/or redevelopment of the Papworth Hospital site for employment uses, initially for healthcare employment and then class B1 uses;

- Papworth Everard West Central for mixed use development (only a small element for employment);
- 3 hectares land at Longstanton for B1 uses;
- 2.3 hectares land at Pampisford;
- 3.9 hectares land at Gamlingay for B1, B2 & B8;
- 1.09 hectares land at Over (Norman Way) for B1, B2 & B8; and
- 6.55 hectares land at Ermine Street South Papworth Everard

2.71 *The Cambridge East Area Action Plan (AAP*) provides for the creation of a new and distinctive sustainable community on the eastern edge of Cambridge, creating a new urban quarter for the city. The AAP provides policies related to the setting, character and design of the community, its implementation and phasing. Included within the policy framework is the requirement to provide for 4,000 - 5,000 jobs (net) located at either the district centre as part of mixed use development, or at a number of local centres within which there will be small scale local employment.
2.69 Policy CE/11 (which is almost identical to Policy ET/1 of the Development Control Polices DPD which is cited in section 2.72 below) provides for the selective management of employment development at Cambridge East.

2.72 *The Cambridge Southern Fringe Area Action Plan* allocates approximately 15.5 hectares of land south of Addenbrookes for a distinctive urban expansion of Trumpington. The site is the former Monsanto site and incorporates the existing office and laboratory accommodation. Within this development there will be provision for small scale B1 employment development which would be subject to limitations on the occupancy of new premises as set out in Policy ET/1 of the Development Control Policies DPD.

2.73 *The Northstowe Area Action Plan* identifies the site for a sustainable new town of 8,000 dwellings and associated development including a town centre, five distinct local centres and two employment centres.

2.74 The objectives for employment are among other things to encourage the development of a mixed economy to provide a range of employment to support the development of a socially inclusive community which that means that the policies must meet not only local needs but must contribute to the success of the Sub – Region.

2.75 The Plan has been the subject of a Public Inquiry and the Council has received amended wording for the AAP in relation to the employment allocation which include:

Policy 5/d An objective of employment development will be “to provide for firms that the Sub - Region needs to attract in order to grow and strengthen its role as a High Technology Custer.”

Policy NS/11 “Northstowe will provide approximately 20 hectares of employment land throughout the town comprising:

a) A significant high density employment area integrated with the town centre and located close to a stop on the dedicated local busway providing a business district which includes office based accommodation, D1 educational uses and research institutes, and which supports and contributes to the sub regional technology cluster including research and development, in accordance with the Town Centre Strategy;

b) Small scale local B1 employment within local centres as demand requires of an appropriate scale to a generally residential area; and

c) An employment area of approximately 5 hectares for predominantly B1(c) B2 & B8 employment of a scale serving the needs of Northstowe adjoining the Park and Ride site on Station Road, Longstanton.

2.76 The Inspectors also suggested the following wording for section D5.2 “Employment development at Northstowe will need to demonstrate a clear need to be located in the area, or serve local needs to supply, service, support the sustainable growth of the new town or support and contribute to the Sub - Regional high technology cluster including research and development.”

2.77 *The Development Control Policies DPD* includes a number of policies related to employment developments. The key objectives are to:

- support the Cambridgeshire area as a world leater in research and technology industries, higher education and research, particularly clusters;
- manage the development pressures favouring those uses that need to be locate close to Cambridge;
- support existing businesses;
- reduce commuting;
- support the rural economy and farm diversification; and
- support growth of tourism

2.78 Policy ET/1 relates to the limitations on occupancy of new premises:

a) offices or other development, in Use Class B1 (a) , providing an essential service for Cambridge as a local or sub-regional centre;

b) high technology and related industries, in Use Class B1 (b), primarily concerned with research and development, which show a special need to be located close to the universities or other established research facilities or associated services in the Cambridge Area;

c) Use Class D1 educational uses and sui generis research establishments, that can show a special need, to be located close to existing major establishments in related fields (such as the universities, the teaching hospital, or private research establishments), in order to share staff, equipment or data or to undertake joint collaborative working;

d) other small scale industries in class B1(c), B2 & B8 (up to 1850 sq m) which contribute to a greater range of local employment opportunities, particularly if it takes advantage of the development of locally – based skills or expertise.

2.79 The Inspectors have reported that in c) “required in the national interest” be replaced to read “that can show a special need” and in d) “contributes” should read “takes advantage of.”

2.80 Policy ET/3 permits development in suitable locations which support the development of clusters in the following sectors:

- biotechnology & biomedical
- computer services
- electronic engineering
- information technology/telecommunications
- healthcare, teaching and medicine
- research and development
- other locally driven clusters as they emerge

2.81 Employment land allocations especially suitable for cluster development are identified at Northstowe and the urban extensions to Cambridge.

2.82 Policy ET/4 states in defined Established Employment Areas in the Countryside, redevelopment of existing buildings, and appropriate development for employment uses may be permitted. The Areas defined on the Proposals Map are:

- Buckingway Business Park
- Cambourne Business Park
- Cambridge Research Park, Landbeach
- Site to the north of Cambridge Research Park, Landbeach
- Granta Park, Great Abington
- Wellcome Trust Genome Campus, Hinxton
- Norman Way Industrial Estate, Over
- Land at Hinxton Rd, south of Duxford
- Convent Drive/Pembroke Avenue site, Waterbeach
- Brookfield Business Estate Twentypence Rd, Cottenham
- Spicers Ltd Sawston
- Daleshead Foods Ltd, Cambridge Road, Linton

2.83 Policy ET/5 provides for new small scale employment in the B1 to B8 Use Classes. Small scale employment development in villages is defined as employing no more that 25 people as follows: B1 (a) 400 sq m; B1 (b) 725 sq m; B1 (c) 800 sq m; B2 – B7 850 sq m and B8 1,250 sq m.

2.84 Policy ET/6 permits development for the expansion of existing firms provided it meets the tests of Policy ET1 and is for the occupation and use of the existing firm. Such expansion will be permitted:
- within village frameworks or on previously developed land next to or very close to village frameworks;
- within Northstowe and Cambridge East; and
- within Established Employment Areas in the Countryside listed in Policy ET4.

2.85 The Inspectors have reported amendments to section 5.17 to read "It is important that existing firms that do not meet the requirements of Policy ET/1 have the opportunity to expand and adapt for the continued success of the business, but this must be in appropriate circumstances. The scale of growth must not conflict with other policies in the Plan and must not result in an unsustainable level of development in a particular location. Firms seeking large scale expansion are encouraged to seek locations outside the Cambridge area, for example in the surrounding market towns."

2.86 *South Cambridgeshire Economic Development Strategy June 2003* The Strategy is now four years old and has not been updated, but strategic objectives of the strategy are worth noting. These are to:

- seek to achieve a more sustainable balance in meeting the demand for employment land;
- ensure that the strategic sites are made available for appropriate development;
- allocate sufficient employment land to meet the needs of expanding businesses or businesses with an identified need to be located in the Cambridge area;
- maintain an up to date database of employment land;
- to continue the selective management of development in the Cambridge area in order to disperse the effects of the 'Cambridge phenomenon' to areas beyond Cambridge and retain sites around Cambridge for uses with an identifiable need for that location;
- develop policies to promote appropriate expansion of firms through the LDF; and
- support appropriate farm diversification schemes and re-use of redundant rural buildings for appropriate employment uses.

2.87 *South Cambridgeshire Community Strategy 2004-07* The Community Strategy has identified as a key issue the need to ensure a prosperous district where jobs, skills and learning benefit all; allowing everyone to participate and maximise the potential of science, innovation and social enterprise.

Policy Implications for the Employment Land Review

2.88 The review of the Government's guidance for undertaking employment land reviews and relevant national, regional and local planning and economic development policies has identified three dominant policy themes: enabling the market as a national policy imperative; selectively managing the market as a Sub – Regional imperative and planning for sustainable development and climate change.

2.89 *Enabling Employment Development*: Government guidance, Planning Policy Statements and RSS policies promote a strong, stable and productive economy.

2.90 The Employment Land Reviews Guidance Note refers to "the promotion of regional, sub – regional and local economies through a positive planning framework and by bringing forward sufficient land of a suitable quality in the right locations to meet expected needs for industrial and commercial development, to provide for growth and consumer choice, taking into account accessibility and sustainable transport needs and the provision of essential infrastructure" (ODPM, 2004: 4 - 5).

2.91 At the regional level the RSS sets an indicative target, Policy E1, for a net growth of 75,000 jobs in Cambridgeshire for the period 2001 – 2021 and adds, under Policy E2,

"LDDs should ensure that an adequate range of sites / premises (including dedicated land / sites within mixed use areas and town / district centres) is identified and then subsequently allocated, safeguarded and / or protected to meet the full range of sectoral requirements needing to be accommodated to meet indicative job growth targets of Policy E1 and the needs of the local economy as revealed by up to date employment land reviews."

2.92 *Selectively Managing Employment Development:* Planning Policy Statement 11 notes that the RSS should, among other things, include, where appropriate, provision of for the location, expansion and promotion of clusters or networks of knowledge driven industry.

2.93 Following PPS 11, ‘Policy E4 Cluster Development’ of the RSS notes that LDDs should demonstrate support for clusters by, among other things, addressing the need for user restrictions to secure the use of premises for specific purposes.

2.94 Building on Policy E4, ‘Policy CSR2 Employment – Generating Development’ in the RSS states “employment land in and close to Cambridge, within boundaries to be defined in local plans, should be reserved for development which can demonstrate a clear need to be located in the area to serve local requirements or contribute to the continuing success of the sub – region as a centre of high technology and research. Employment - related development proposals should demonstrate that they fall into the following categories:

a) high technology and related industries and services concerned primarily with research and development including development of D1 educational uses and associated sui generis research institutes, which can show a need to be located close to the universities or other established research facilities or associated services in the Cambridge area;

b) other small scale industries which would contribute to a greater range of local employment opportunities, especially where this takes advantage of, or contributes to the development of, particular locally based skills and expertise; and

c) the provision of office or other development providing essential services to Cambridge as a local or sub – regional centre.

Specific provision will be made throughout the sub – region for the development and expansion of high – technology clusters.”

2.95 The main policies of the Cambridge City Local Plan 2006 and South Cambridgeshire LDF Core Strategy 2007 are concerned with the selective management of the local economy “to support the Cambridge Area’s position as a world leader in research and technology based industries, higher education and research, particularly through the development and expansion of clusters” (SCDC, 2007: 8).

2.96 *Planning for Sustainable Development:* The Consultation PPS: Planning and Climate Change states, “the Government believes that climate change is the greatest long – term challenge facing the world today.” Addressing climate change is therefore the Government’s principal concern for sustainable development and it has set a long term ambition to reduce carbon dioxide emissions by some 60% by about 2050.

2.97 To secure enduring progress against this target and help in delivering the Government’s ambition for zero carbon development, the Government has set out key planning objectives and decision making principles for all planning authorities. Two of the key planning objectives are to: secure the highest viable standards of resources and energy efficiency and reduction in carbon emissions; and deliver patterns of urban growth which overall reduce the need to travel especially by car. A key decision making principle is that the planned provision for new development and its spatial distribution should contribute to mitigating climate change through improvements in carbon performance.

2.98 The Consultation PPS adds that all planning authorities should adhere to these principles so that climate change considerations are integrated into all spatial planning concerns, including transport, housing, economic growth and regeneration, water supply and waste management, and not considered separately

The Policy Lens for the Employment Land Review

2.99 The combination of three dominant policies creates the policy lens through which to undertake the Employment Land Review:

i) the market: to identify an adequate supply of sites to meet indicative job growth targets and safeguard and protect these sites from competition from other uses particularly housing;

ii) selective management: to reserve employment land in and close to Cambridge, for development which can demonstrate a clear need to be located in the area to serve local requirements or contribute to the continuing success of the sub region as a centre of excellence and world leader in the fields of higher education and research and further expansion of the knowledge based economy; and

iii) sustainable development and climate change:

- to make the most of the development potential of land, sequentially: in the built up area of Cambridge; on the periphery of the built – up area of Cambridge; at a new settlement of Northstowe, linked to the guided busway; and within the sub region's market towns and key service centres; and
- to secure the highest viable standards of resource and energy efficiency and reduction in carbon emissions and deliver patterns of urban growth that help secure the fullest possible use of sustainable transport for moving freight, public transport, cycling and walking and overall reduce the need to travel especially by car.

3 STAGE ONE: TAKING STOCK OF THE EXISTING SITUATION

Introduction

3.1 The Government's guidance sets out a five step process for Stage One, 'Taking Stock of the Existing Situation.' These steps are to: devise a brief; collate data on land stock and revealed demand (indicated by the take up of sites and premises); devise and apply site appraisal criteria; undertake preliminary site appraisal and confirm the brief for Stages Two and Three.

3.2 The guidance states 'the principal outcome of stage one will be the identification and protection of the 'best' employment sites and the identification and potential release of those existing or allocated employment sites which clearly do not meet sustainable development criteria, and are unlikely to meet future market requirements.'

Data on land stock and revealed demand

3.3 To produce data on land stock, Cambridge City Council compiled a database of 49 employment areas identified in the Cambridge Local Plan 1996 and on the Cambridge Local Plan Proposals Map as 'protected industrial sites.' In turn, South Cambridgeshire District Council compiled a database of 49 employment areas shown on the Proposals Map (Development Plan Document Submissions Draft January 2006) as 'established employment area in the countryside (ET/4),' 'employment commitments SP/10 and SP/11' and 'employment allocations SP/10 and SP.' The sites are listed in Appendix 3.

3.4 To identify revealed demand in property market segments and sub areas and issues for later stages of the review, the Councils analysed market responses to 94.41 ha of employment land on twenty sites in Cambridge and South Cambridgeshire as follows:

- 32.71 ha of employment land allocated on nine sites in the Cambridge Local Plan 1996;
- 61.7 ha of employment land allocated on eleven sites in the South Cambridgeshire Local Plan 1993.

Market Responses to Employment Land Allocations

	Cambridge ha	South Cambs ha	Total ha
Developed	13.52 (41%)	23.76 (39%)	37.28 (40%)
Available	9.02 (28%)	29.15 (48%)	38.17 (41%)
Lost to other uses	10.17 (31%)	8 (13%)	18.17 (19%)
Total	32.71	60.91	93.62

3.5 *Cambridge:* the main findings are illustrated on Map 1 and summarised below:
a) employment gains: 46,412 sq m of employment development completed on 13.5 ha, comprising:
- B1 (a) completions at Cambridge Business Park (24,439 sq m on 6.07 ha);
- B1 (b) completions at Cowley Road (3,311 sq m on 0.32 ha) and the University West of Cambridge site (6,100 sq m and 1902 sq m for Microsoft and 1,942 sq m for the CAD Centre on a total of 3.4 ha); and
- B1 (c), B2 and B8 development at Coldhams Business Park, Norman Way (6,524 sq on 3.24 ha), 1,170 sq m on 0.14 ha at Garlic Row and 1,024 sq m on 0.35 ha at Coldham's Lane north of the railway.

b) employment land: 57,109 sq m of employment development consented on 9.02 ha comprising :
- B1 (b) at Cowley Road (2,108 sq m on 0.48 ha) and the University West of Cambridge site (32,903 sq m in B1 (b) and 22,098 sq m in sui generis research institutes on 8.54 ha);

c) employment land losses: 10.17 ha of employment land allocations lost to other uses at Norman Way, off Coldhams Lane (where 7.76 ha of a mixed 11 ha allocation were developed for leisure uses), the former gas works (1.52 ha for retail) and Barnwell Drive (0.89 ha for a housing allocation).

3.6 *South Cambridgeshire:* the main findings are illustrated on Map 2 and summarised below:
a) employment gains: completions on 23.76 ha including:
- B1 (b) completions at Cambridge Research Park, Landbeach (on 8.36 ha);
- B1 (c) / B2 completions at Papworth Business Park (on 7.03 ha), Buckingway Business Park extension (on 6.24 ha), Norman Way, Over (on 0.7 ha), and London Road, Pampisford (on 1 ha).

b) employment land: 118,659 sq m of potential employment development (either consented or allocated) on 29.15 ha comprising:
- B1 (b) at Cambridge Research Park, Landbeach (38,475 sq m on 9.7 ha) and Hattons Road, Longstanton (12,500 sq m on 4.38 ha);
- B1 / B2 at Station Road, Gamlingay (26,000 sq m on 3.9 ha), Papworth Business Park (15,149 sq m on 3.55 ha), Buckingway Business Park (6,932 sq m on 2.84 ha), Premier Foods, Histon (7,400 sq m on 1.77 ha), Norman Way, Over (8,503 sq m on 2.15 ha) and London Road, Pampisford (3,700 sq m on 0.86 ha).

c) employment land losses: 8 ha of employment land lost to other uses at Papworth Everard, west of Ermine Street (consent for housing on 4 ha), Cambridge Research Park (consent for a hotel on 1.4 ha), Saxon Way Industrial Estate extension (1.2 ha lost to housing) and Woburn Place, Heathfield (1.4 ha lost to housing).

3.7 Over the two districts:
- 37 ha (40%) of the allocated land had been developed;
- 38 ha (41%) remains available for development; and
- 18 ha (19%) had been lost to other uses.

3.8 The analyses of revealed demand identified:

i) *the phased supply of land in areas of demand:* the development of the largest schemes has been phased with land available for development at Cambridge Research Park (9.7 ha), Papworth Business Park (3.55 ha) and Buckingway Business Park, Swavesey (2.84 ha) and the University of Cambridge's policies for development at the West of Cambridge (8.54 ha);

ii) *demand across three employment property sub markets:* the largest schemes have served three property sub markets: large offices (B1 a) at Cambridge Business Park, Research and Development accommodation (B1 b) at Cambridge Research Park, Landbeach and light/ general industry (B1/ B2) at Papworth Business Park and Buckingway Business Park, Swavesey;

iii) *competition between employment and other uses*: employment land allocations in Cambridge and South Cambridgeshire have been the subject of competing market demands for:

- the full range of employment development (as described in ii) above); and

- alternative – higher value – uses notably: housing at Saxon Way Industrial Estate, Melbourn, Papworth Everard (east of Ermine Street) and Woburn Place, Heathfield along with retail at the former Gas Works, Cambridge.

iv) *lack of market demand for employment land*: one allocation at Station Road, Gamlingay has not been brought forward for development.

3.9 The four types of market responses to the Local Plan employment land allocations point to three policy issues:

i) *promote sustainable development*: any new allocations need to made in accordance with policies to:

- make the most of the development potential land sequentially: in the built up area of Cambridge, on the periphery of the built – up area of Cambridge, at the new settlement of Northstowe and within the sub region's market towns and key service centres; and

- deliver patterns of urban growth that help to secure the fullest possible use of sustainable transport and overall reducing the need to travel especially by car.

ii) *secure balanced, comprehensive and sustainable development*: any new allocations need to be considered as part of mixed use schemes with conditions to link housing and employment completions.

iii) *safeguard existing and new employment land allocations*: employment development and land allocations can be blighted by the hope value of a later change of use to housing and other higher value uses. Consideration needs to be given to strengthening policies to protect existing and new employment land from such pressures for change of use.

3.10 The nature and extent of revealed demand for employment land identified in the Local Plans are set in detail below, summarised in Appendix 1 and illustrated in Maps 1 and 2.

Revealed Demand for Employment Land Identified in Local Plans 1993 and 1996

Cambridge

Allocations	B1 (c) / B2/ B8	Offices B1 (a)	R &D B1 (b)	Available	Lost
Garlic Row	0.14				
Coldhams Common	0.35				
Gas Works					1.52
Peverel Drive					0.89
Norman Way, Coldhams Lane	3.24				7.76
St. John's, Cowley Road			0.32	0.48	
Cambridge Business Park, Cowley Road		6.07			
University West			3.4	8.54	
TOTAL (ha)	**3.73**	**6.07**	**3.72**	**9.02**	**10.17**

South Cambridgeshire North and West of Cambridge

Allocations	B1 (c) / B2/ B8	Offices B1 (a)	R &D B1(b)	Available	Lost
Station Road, Gamlingay				3.92	
Premier Brands, Histon	0.43			1.77	
Cambridge Research Park			8.36	9.72	1.4
Hattons Road, Lonstanton				4.38	
Saxon Way, Melbourn					1.2
Norman Way, Over	0.7			2.15	
Ermine Street, Papworth Everard					4
Papworth Business Park	7.03			3.55	
Buckingway Business Park	6.24			2.84	
TOTAL (ha)	**14.4**		**8.36**	**28.33**	**6.6**

South Cambridgeshire South and East of Cambridge

Allocations	B1 (c) / B2/ B8	Offices B1 (a)	R &D B1 (b)	Available	Lost
Woburn Place, Heathfield					1.4
Eastern Counties (west of), Pampisford	1.0			0.86	
TOTAL (ha)	**1.0**			**0.86**	**1.4**

Allocations	B1 (c) / B2/ B8	Offices B1 (a)	R &D B1 (b)	Available	Lost
Cambridge	3.73	6.07	3.72	9.02	10.17
South Cambs North and West	14.4		8.36	28.33	6.6
South Cambs South and East	1.0			0.86	1.4
TOTAL (ha)	**19.13**	**6.07**	**12.08**	**38.21**	**18.17**

Devise and Apply Site Criteria and Preliminary Site Appraisal
3.11 The Stage One appraisal is concerned with:

- identifying established employment areas (including general industrial/ business areas, warehouse/ distribution parks, business parks and research and technology/science parks) which should be without doubt safeguarded for future employment use; and

- identifying allocated sites of 0.25 ha and above which remain wholly or partly undeveloped for either retention or release.

3.12 Under these tasks, the Councils:

- devised appraisal criteria and a five point scoring system concerning: developer demand, business demand, sequential test, sustainable access and strategic and local planning issues (described in Appendix 2);

- applied the appraisal criteria and scoring system to the 98 employment areas and confirmed (in Appendix 3) that 89 should, without doubt, be safeguarded for future employment use; and

- carried out a further site appraisal (summarised in Appendix 4) of two wholly undeveloped allocated employment sites for release as unsuitable or unlikely to be brought forward.

3.13 The results of the further appraisal are summarised in Appendix 5 and described below:

- land adjacent to Wellbrook Court, Girton: it was concluded that in the light of current and potential land supply in more sustainable locations, it would be unlikely for this site to be identified for employment and could be considered for reallocation for housing;

- Station Road, Gamlingay: it was concluded that this site be considered for de allocation in the light of market failure to bring forward development and the absence of any policy to justify its retention.

3.14 In addition three employment sites were found to have been allocated for housing and two sites – which are occupied by Marshall of Cambridge - may form part of the Cambridge East mixed use scheme. Two further sites – currently occupied by firms – were found to have potential for housing and were identified for further appraisal under Stage Three:

- Jedburgh Court, Buchan Street, Cambridge;
- Ditton Walk South, Cambridge

The Brief for Stages Two and Three
3.15 The Councils prepared briefs for:

i) Stage Two, to:

- commission the preparation and interpretation of labour supply and demand forecasts;
- analyse development trends over the period 1998 – 2006;
- quantify land supply;
- translate employment forecasts to land requirements; and
- build scenarios

ii) Stage Three, to:
- assess sites for potential release and define gaps in the portfolio of employment land;
- engage stakeholders in the review and invite them to put forward sites to be considered for future employment development; and
- assess additional sites to be brought forward.

4 STAGE TWO: CREATING A PICTURE OF FUTURE REQUIREMENTS

Introduction

4.1 The Government's guidance sets out a five step process for Stage Two, 'Creating a Picture of Future Requirements.' These steps are to: understand market areas and segments; select and apply suitable forecast model / demand analyses; quantify employment land supply; translate employment forecasts to land requirements and scenario testing.

4.2 The guidance states the outcomes of Stage Two are a quantitative assessment of future employment land requirements for the plan period, a quantitative assessment of suitable employment land stock remaining from Stage One and an analysis of the likely 'gap' in supply to be filled.

Understanding Market Areas and Segments

4.3 The guidance advises that employment property markets need to be considered in two ways:

- the supply and demand within geographical employment property markets; and
- the supply and demand within types of employment property within these geographical markets.

4.4 In Stage One, the market responses to employment land allocations in the Cambridge Local Plan 1996 and South Cambridgeshire Local Plan 1993 considered three geographical employment property markets:

- Cambridge;
- North and West of Cambridge;
- South and East of Cambridge.

4.5 To analyse supply and demand within these areas, the Councils classified:
- 49 employment areas totalling 182 ha in four sub market areas in Cambridge;
- 36 employment area totalling 320 ha north and west of Cambridge (excludes 159 ha cement works and quarry);
- 13 employment area totalling 219 ha south and east of Cambridge.

4.6 The names and locations of the employment areas are set out in Appendix 6 and shown on Maps 3 and 4. The analysis focuses on dedicated industrial estates and business parks. It excludes the City office areas (as these need to be analysed in terms of floorspace) and the 159 ha cement works and quarry which is identified as specialist industrial site in South Cambridgeshire.

i) Old General Industrial and Business Areas: coherent areas of land which are, in terms of environment, road access, location, parking and operating conditions, well suited for retention in industrial use: 259 ha (36 %);

ii) New General Industrial and Business Areas: as above but with a newer stock of property: 36 ha existing and 52 ha proposed (12.2 %);

iii) High Quality Business Parks: sites of over 5 ha either occupied by or likely to attract national or multi national firms. Key characteristics are quality of buildings and public realm and access to main transport networks. Likely to have significant pure office, high office content manufacturing and R&D facilities: 48 ha (6.7 %);

iv) Research and Technology / Science Parks: Usually office based developments, which are strongly branded and managed in association with academic and research institutions: 261 ha established and 35 ha proposed (41%);

v) Warehouse and Distribution Parks: large, often edge/ out of town serviced sites located at key transport interchanges: 4.42 ha (0.6 %);

vi) Other Sites: Proposed mixed use schemes 3.13 ha, incubators 2.49 ha, office locations 14.46 ha and occupied employment areas that have been allocated for housing 4.81 ha (3.5 %).

CAMBRIDGE: EMPLOYMENT AREAS

North Cambridge

Types of Site	Area (ha)	District %
Old General Industrial and Business Areas Incubator/ SME cluster site Established Office Location	19.05 2.49 8.94	
	30.48	16.7%

City Railside

Types of Site	Area (ha)	District %
Old General Industrial and Business Areas New General Industrial and Business Areas Warehouse and Distribution Park Established Office Location Proposed Mixed Use Housing Allocation	29.62 7.55 1.61 0.68 3.13 1.14	
	43.73	24.1%

East Cambridge

Types of Site	Area (ha)	District %
Old General Industrial and Business Areas New General Industrial and Business Areas Warehouse and Distribution Park Established Office Location Research and Technology/ Science Park Housing Allocation	33.19 1.23 2.81 2.79 4.58 3.67	
	48.27	26.6%

West and Central Cambridge and Addenbrookes

Types of Site	Area (ha)	District %
Research and Technology/ Science Park Proposed Research and Technology/ Science Park	29.15 30.05	
	59.2	32.6%

SOUTH CAMBRIDGESHIRE: EMPLOYMENT AREAS

North and West of Cambridge

Types of Site	Area (ha)	District %
Old General Industrial and Business Areas New General Industrial and Business Areas Proposed New General Industrial and Business Areas Office Locations High Quality Business Parks Research and Technology/ Science Parks Specialist Industrial Site	82.51 27.48 52.13 2.06 31.97 123.74 159	
	478.89	68.6%

South and East of Cambridge

Types of Site	Area (ha)	District %
Old General Industrial and Business Areas High Quality Business Parks Research and Technology/ Science Parks	94.77 16.13 108.29	
	219.19	31.4%

4.7 The analysis found that three types of employment area account for almost 90% of employment land in Cambridge and South Cambridgeshire:

research and technology and science parks account for 296 ha or 41 % of the stock;
old general industrial and business areas account for 259 ha or 36% of the stock;
new general and business areas accounts for 88 ha or 48% (comprising 36 ha of existing and 52 ha of proposed development).

4.8 To analyse the supply of and demand for new employment property (on previously undeveloped employment land) completions for the period 1998 – 2006 were categorised as follows as R&D (B 1 b), offices (B1 c) and light and general industry and warehousing (B1 c, B2 and B8). Schemes were allocated according to the use classes set out in the decision notices but it should be noted that some consents allowed for flexibility between the B1, 2 and 8 use classes and there are permitted changes of use (from B1 to B8, B2 to B1 or B8 and B8 to B1 up to 235 sq m).

Cambridge: Completions on Previously Undeveloped Employment Land since 1998

Property Market Areas	Existing and Proposed Employment Land (ha)	Development on Previously Undeveloped Land (ha)
North Cambridge	30.48	5.67
City Railside	33.89	0.41
East Cambridge	21.62	5.83
West and Central with Addenbrookes	48.45	3.4
Total	**134.44**	**15.31**

South Cambridgeshire: Completions on Previously Undeveloped Employment Land Since 1998

Property Market Areas	Existing Employment Land (ha)	Development on Previously Undeveloped Land (ha)
North and West	484.6	41.46
South and East	215.17	29.48
Total	**699.77**	**70.94**

4.11 In Cambridge, there were completions on 15.31 ha of previously undeveloped employment land:
- 2 R&D (B1 b) schemes accounted for 5.99 ha or 39.1% of the land;
- 2 office (B1 a) schemes accounted for 5.67 ha or 37%
- 3 light and general industrial/ warehousing schemes accounted for 3.65 ha or 23.9%.

4.12 In South Cambridgeshire, there were completions on 70.94 ha of previously undeveloped employment land:
- 24 R&D schemes accounted for 37.5 ha or 52.8% of the land;
- 25 office schemes accounted for 23.75 ha or 33.5%; and
- 16 light and general industrial schemes accounted for 9.69 ha or 13.7%.

4.13 The locational analysis of these completions found:

- R&D (B1 b) schemes accounted for 50% of the take up of previously undeveloped employment land: over 94% of this take up was in six schemes in:
  - Cambridge at Peterhouse Technology Park (15,001 sq m) and the University West of Cambridge site (8,000 sq m),
  - north and west South Cambridgeshire at Cambridge Science Park (22,545 sq m) and Cambridge Research Park, Landbeach (21,397 sq m), and
  - south and east South Cambridgeshire at Granta Park and TWI, Great Abington (58,229 sq m) and Hinxton Hall, Hinxton (14,229 sq m).
- office schemes accounted for 34% of the take up of previously undeveloped employment land: 64% of this take up was in three new schemes in:
  - Cambridge at Cambridge Business Park (24,439 sq m),
  - north and west South Cambridgeshire at Cambourne Business Park, Cambourne (30,868 sq m), and
  - south and east South Cambridgeshire at Capital Park, Fulbourn (10,688 sq m);
- light and general industry and warehousing schemes accounted for 16% of the take up of previously undeveloped employment land: of which 62% was in two schemes:
  - in Cambridge at Coldhams Business Park, Norman Way, Cambridge (6,524 sq m),
  - south and east South Cambridgeshire at Papworth Business Park, (14,155 sq m).

Cambridge: Completions on Previously Undeveloped Employment Land Since 1998

Property Market Areas	**R&D (B1 b)**	**(ha)**	**Offices (B1 a)**	**(ha)**	**Industry B1/2/8**	**(ha)**
North			27,750	5.67		
City Railside					2,010	0.41
East	15,001	2.59			6,524	3.24
West and Central with Addenbrookes	8,002	3.4				
Total	**23,003**	**5.99**	**27,750**	**5.67**	**8,534**	**3.65**

South Cambridgeshire: Completions on Previously Undeveloped Employment Land Since 1998

Property Market Areas	**R&D (B1 b)**	**(ha)**	**Offices (B1 a)**	**(ha)**	**Industry B12/8**	**(ha)**
North and West	48,710	14.81	57,516	18.72	21,195	7.93
South and East	76,072	22.69	17,069	5.03	3,482	1.76
Total	**124,782**	**37.50**	**74,585**	**23.75**	**24,677**	**9.69**

Select and Apply Suitable Forecast Model/ Demand Analyses
4.14 The guidance identifies three methodologies for forecasting and demand analyses:

- demography based forecasts of future employment needs ('labour supply techniques');
- econometric based regional and sub regional economic and employment forecasts ('labour demand techniques'); and
- property trend forecasts based on the past take up of employment land and property.

4.15 In accordance with this guidance, Cambridgeshire County Council's Research Group was commissioned to undertake a comparative analysis of recently produced forecasts of:
labour supply: the resident economically active population; and
labour demand: the total numbers of jobs and jobs in broad industry sectors.

4.16 A technical note on the 1991 and 2001 Census data on residents employed and workplace population and net commuting is set out in Appendix 7. A second technical note on monitoring change in labour supply and demand since 2001 is set out in Appendix 8.

4.17 *Labour Supply*: The Research Group identified and compared four forecasts of the resident labour force of Cambridge and South Cambridgeshire which have been produced since 2001 for:

- Cambridgeshire & Peterborough Joint Structure Plan Review, 2001 by Cambridge Econometrics;
- Regional Spatial Strategy (RSS) submitted draft plan, 2005 by Anglia Ruskin University (ARU 'Chelmer' model);
- Update of the RSS dwellings-based plan, incorporating ONS 2004 based economic activity rates (as published in 2006) and latest ONS household representative ('headship') rates, 2006 by Anglia Ruskin University; and

- Cambridgeshire County Council's (CCC) latest forecasts incorporating CCC's population forecasts and ONS 2004 based economic activity rates, published in 2007 these forecasts are available in two scenarios: i) including dwelling figures from the submitted RSS, and ii) incorporating an additional 4,300 dwellings, as proposed by the Secretary of Sate in response to the RSS and Panel Report.

Table 1 compares the forecasts at 5-yearly intervals: 2001, 2006, 2011, 2016 and 2021

Table 1: Comparison of Forecasts of Resident Labour Supply, Cambridge City & South Cambridgeshire, 2001 to 2016/21

Forecast	Y - 2001	Y - 2006	Y - 2011	Y - 2016	Y - 2021	Change 2001/21	% change 2001/21 p.a.
Structure Plan	134,000	146,450	157,500	168,800	n.a.	n.a.	1.7%
RSS submitted	123,700	137,550	150,100	161,550	173,150	49,450	2.0%
RSS July 2006 update ONS '06	123,700	137,500	148,650	157,700	165,750	42,050	1.7%
RG Cambs CC ONS '06	123,800	130,600	146,450	156,400	159,250	35,450	1.4%
RG Cambs CC SoS ONS '06	123,800	130,600	146,450	159,350	162,050	38,250	1.5%

Sources: RSS (ARU), Cambridgeshire County Council, ONS (activity rates 2006)

4.18 The baseline for this comparative analysis was provided by the forecasts produced for the **Cambridgeshire and Peterborough Structure Plan Review.** Whilst the substantive assumptions behind the forecasts were incorporated in a Technical Report (which was produced as a support document to the 2002 Deposit Draft Plan) it is worth noting that:

i) 2001 Census: the forecasts were produced before the results of the 2001 Census became available. These results showed that the Cambridge Structure Plan Review had over estimated the labour force in Cambridge and South Cambridgeshire at 134,000 as against the 2001 Census figure of 123,700. This overestimate is partly explained by the restrictions which discourage the paid employment of the University of Cambridge's undergraduate and postgraduate students during term time. As a result, the economic activity rates of City residents aged 18 – 25 are much lower than in most areas of the UK;

ii) Economic Activity Rates: the economic activity rates incorporated in the Structure Plan Review forecasts were derived from the rates developed by Cambridge Econometrics for their 'local economic forecasting model' (LEFM) for Cambridgeshire and Peterborough in 2001. The population growth incorporated in the Structure Plan review for the period 2001 to 2016 indicated an annual increase of about 2,300 in the resident labour supply over the 15 year period 2001 to 2016, averaging 1.7% per annum;

iii) the forecasts were for the period 2001 – 2016.

4.19 The second forecast was produced for the **Regional Spatial Strategy** (which was included in the draft East of England Plan). This forecast incorporated an approach which is essentially 'dwellings-led' where the population of each District is constrained by forecast house-building. Developed by Anglia Ruskin University, the 'Chelmer' population model was developed by incorporating then up-to-date information on household formation rates, migration (as drawn from the 2001 Census), together with anticipated fertility and mortality rates. The economic activity rates were produced by Cambridgeshire County Council's Research Group in the absence of any 'official' statistics. Basically they assumed an increase in the proportions of people aged 50 and above who are likely to be in or seeking work. This was to reflect changing the age of statutory retirement for women and a shortfall in pension provision.

4.20 The labour supply forecasts for the submitted draft Plan were produced in 2005. For Cambridge and South Cambridgeshire, they incorporated assumptions about development: within the built – up area of Cambridge; in jointly planned extensions to the south, south-west, east and north of Cambridge and at the new settlements of Northstowe and Cambourne. The phasing of development over time is rather crude and should best be considered as a guide to likely growth.

4.21 Over the twenty year period 2001 – 2021, the resident labour force was expected to increase by around 49,000, or 2,450 p.a. In numerical terms this is very close to the Structure Plan rates – although the annual percentage increase of 2% appears higher. This is partly because the labour force at the 2001 baseline is lower.

4.22 The third forecast of the resident labour supply is derived from the **most recent update of Anglia Ruskin University's population model.** This forecast dates from mid 2006. It incorporates a number of changes as compared with the submitted RSS. These include:

- revisions to mortality rates – effectively increasing life expectancy, especially of men – resulting in the need for dwellings;

- major revisions to 'headship' rates – i.e. the propensity for an individual to head a household – based on the prediction that there will be far more single person households amongst people aged 30 to 50 than previously assumed. As a result, the average number of people per dwelling will be reduced;

- new economic activity rates. The Office for National Statistics (ONS) commissioned the first revised set of economic activity rate projections since 1994. They are described as '2004-based' and were published in spring 2006. No regional or local rates have been produced by ONS and it is expected that people producing forecasts will calculate local to national differentials, either using the 2001 Census or the Labour Force Survey as a guide. ARU used Census differentials. It should be noted that the ONS forecasts do not assume as high economic activity rates amongst people aged 50 and above as the Research Group's forecasts for the submitted RSS.

4.23 With the same forecast number of dwellings to be built 2001 to 2021 as assumed in the submitted RSS, the latest labour supply forecasts are somewhat lower. This is due to a combination of lower economic activity rates and a lower resident population. Even so, the forecasts suggest an increase of almost 43,250 economically active residents over the 20 year period, equivalent to an annual average increase of 1.6%.

4.24 The fourth forecast has been produced by **Cambridgeshire County Council's Research Group.** The forecasts incorporate the most up– to–date information on fertility and mortality available from national sources as well as the age structures of people moving into Cambridge and South Cambridgeshire. Students and armed forces are taken into account. As a result, the forecasts incorporate some significant changes to anticipated life expectancy and hence mortality rates amongst the population. Essentially as the local population lives longer, there are – for any given number of dwellings – fewer people who will be economically active living in them. A higher proportion of dwellings will be occupied by people aged above the normal 'working age' as compared with earlier forecasts.

4.25 One area which is not fully understood is the likely impact of migrant workers and their families. ONS only considers as 'residents' those migrants who express the intention to stay in the country for twelve months or more. Any migrant worker indicating a shorter stay will be considered as a short-term visitor and will be excluded from the population estimate and hence the resident labour force. Given the uncertainty about their long-term residence intentions, many migrant workers are currently excluded from local population counts. A change in definition could lead to a very different total population and labour force estimate and forecast, especially as migrant workers tend to be young and some may have larger households than the indigenous population.

4.26 These forecasts again incorporate the revised ONS economic activity rates, (calculated using local to national differentials as at 2001). However, there is uncertainty as to just what impact changes in pension systems may have long-term. Nevertheless there is certainly scope for higher economic activity rates for people aged 50 and above.

4.27 The first forecast, which incorporates the dwelling figures from the draft East of England Plan, indicates an increase of 35,450 in the resident labour force over 20 years or 1.4% per annum. This is significantly lower than any other forecast. The second forecast incorporates a higher dwellings target, which if imposed by the Secretary of State would result in an increase in the resident labour force of 38,250 over 20 years.

4.28 The official population estimates and hence forecasts exclude migrants if they are expected to leave within a year. An analysis of the National Insurance Numbers (NINOs) issued for non British nationals living in Cambridge and South Cambridgeshire for the four years, 2002/3 to 2005/6 (shown in Table 2) shows a rise in NINOs issued in the two years after 2003/04. One explanation of this rise (of 1,300 in Cambridge and 580 in South Cambridgeshire) is based on the assumptions that:

- in the period 2002 – 04 the number of NINOs issued reflected the long established pattern of visiting academics and research workers of whom many stay for a relatively short period of time; and

- in the period 2004 – 06 the rise in the number of NINOs issued can be attributed to migrant workers arriving from the European Union Accession countries (with the growth in Cambridge being significantly higher than in South Cambridgeshire, reflecting not only job opportunities but also the availability of private rented housing).

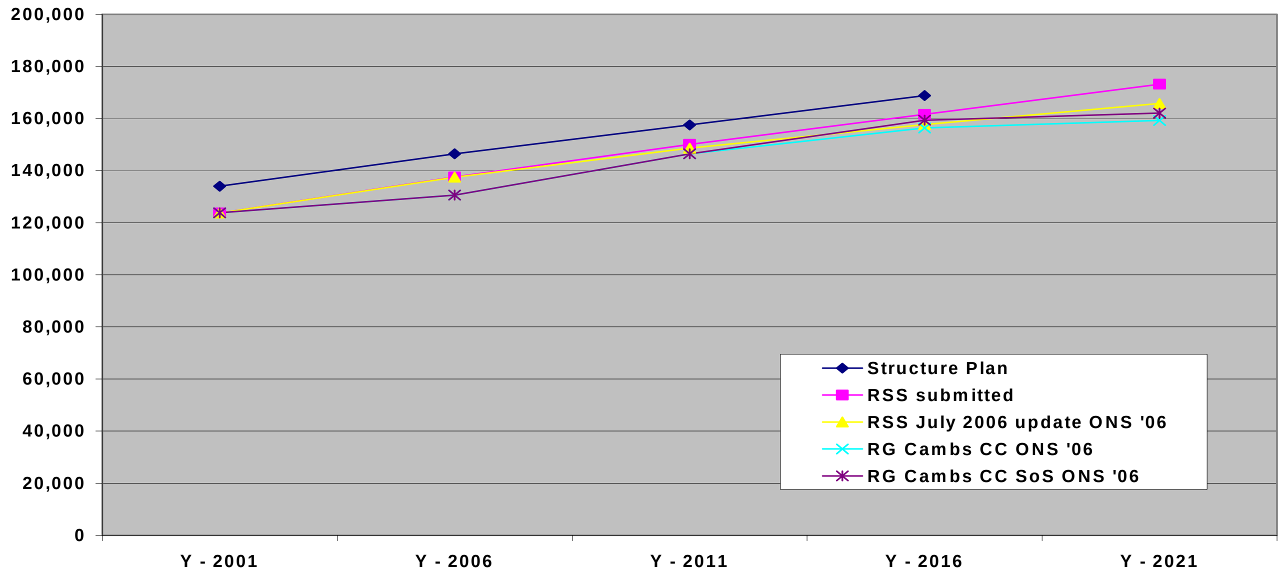
Table 2: NINO registrations, Cambridge City & South Cambridgeshire, 2002/3 to 2005/6

District	2002/03	2003/04	2004/05	2005/06	2002/06
Cambridge City	2,630	2,550	3,040	3,830	12,050
South Cambridgeshire	660	580	910	1,160	3,310
City & South Cambs	**3,290**	**3,130**	**3,950**	**4,990**	**15,360**

Source: DWP

4.29 *Conclusions*: The four forecasts of the Cambridge and South Cambridgeshire resident labour force in 2021 share the RSS target for housing completions (2001 to 2021) in common but incorporate different data sets relating to mortality rates, headship rates and economic activity rates. A visual comparison of the forecasts is shown in Figure 1 below.
.Sources: Cambridgeshire County Council Research Group, Anglia Ruskin University (RSS)

Fig. 1: Labour Supply Forecasts, Various, Cambridge City & South Cambridgeshire, 2001 to 2021



4.30 The highest of the forecasts – an increase in the resident labour force of 49,450 – was included in the draft East of England Plan. The most recent of the forecasts, produced by Cambridgeshire County Council's Research Group, suggest that the resident labour force of Cambridge and South Cambridgeshire has increased by a relatively modest 6,800 between 2001 and 2006. However, this probably excludes the most recent migrant workers, who could add up to 2,700 to this figure, giving 9,500 in total. The forecasts suggest that over the fifteen years from 2006 to 2021 the resident labour force is likely to increase by a further 28,750 – subject to additional migrant workers and the rate of house building exceeding the targets indicated in the draft East of England Plan.

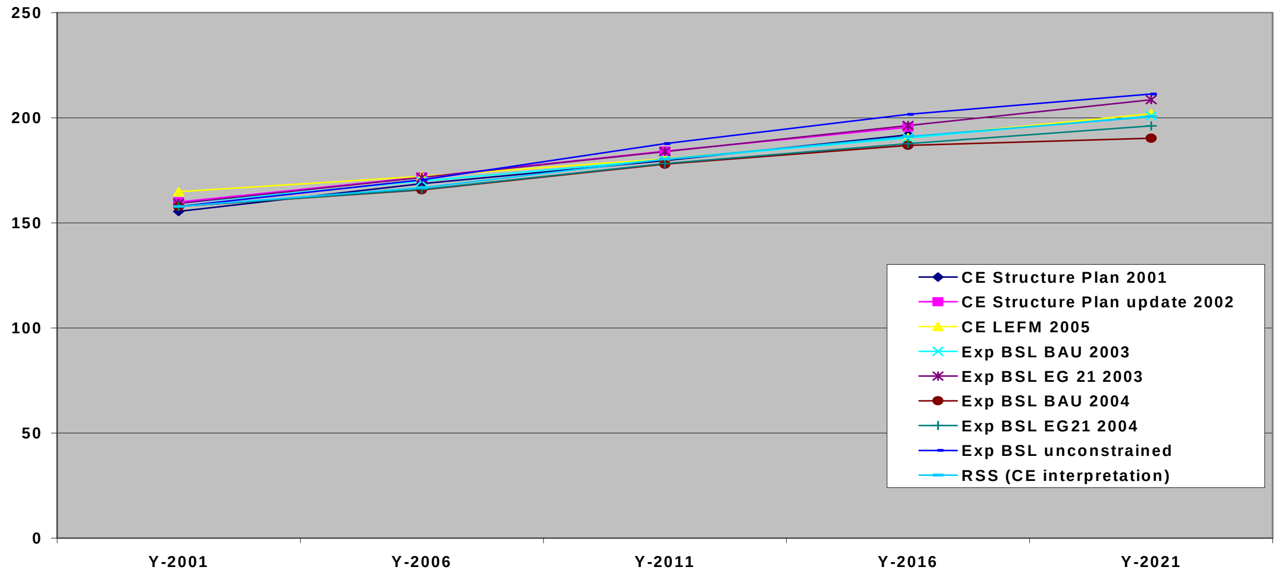
4.31 *Labour Demand*: The Research Group carried out a comparative analysis of seven forecasts or projections of labour demand arising from businesses based in Cambridge and South Cambridgeshire. The forecasts generally cover employment, or 'workplace jobs', rather than the 'workplace population'. The latter is defined as a person in their 'main' job. It takes no account of people with more than one job – generally considered to involve around 5% of the population in work. The relationship between forecasts of 'jobs' and 'workplace population' is discussed in sections 4.59 – 4.65 below. In Table 3 and Figure 2, the forecasts are compared for five year periods from 2001 to 2021.

Table 3: Comparison of Employment Forecasts for Cambridge City & South Cambridgeshire 2001 to 2021, various forecasts, '000 jobs

Source of Forecast	Y-2001	Y-2006	Y-2011	Y-2016	Y-2021	Change 2001/21	% p.a change 2001/21
CE Structure Plan 2001	155.5	168.7	179.65	191.95	n.a.		1.6%
CE Structure Plan update 2002	160	171.8	184.1	195.5	n.a.		1.5%
CE LEFM 2005	164.78	172.20	180.46	190.56	201.98	**37.20**	1.1%
Exp BSL BAU 2003	159.24	169.82	180.18	190.51	200.89	**41.65**	1.3%
Exp BSL EG 21 2003	159.24	171.59	183.95	196.29	208.63	**49.39**	1.6%
Exp BSL BAU 2004	157.82	165.67	177.90	186.92	190.34	**32.52**	1.0%
Exp BSL EG21 2004	157.82	165.90	178.26	187.72	196.16	**38.34**	1.2%
Exp BSL unconstrained	157.82	170.47	187.69	201.66	211.31	**53.49**	1.7%
RSS (CE interpretation)	157.81	166.82	180.35	190.99	200.57	**42.76**	1.4%

Sources: Cambridge Econometrics, Experian BSL

Fig. 2: Comparison of Forecasts of Labour Demand (Jobs), Cambridge City & South Cambridgeshire Combined, 2001 to 2021, various, '000 jobs



Sources: Cambridge Econometrics, Experian BSL

4.32 An explanation of each forecast is provided in turn.

4.33 *Cambridge Econometrics LEFM (Local Economic Forecasting Model)* 2005: The most recent Cambridge Econometrics (CE) forecast in the public domain was published in spring 2005. It was one of a district-level suite produced for a major study looking at commuting across the whole of the East of England, London and South East regions. No adjustments were possible to account for problems with the validity of base data (for example, erratic Research & Development figures and the occasional miscoding of a major employer). The forecast is basically a 'trend' and thus assumes that each district's share of future population growth will follow past patterns. It shows an increase of 21,700 jobs over 20 years, equivalent to 1.6% per annum.

4.34 The forecast supposedly takes into account results from the 2001 Census, as well as up-to-date Labour Force Survey analyses. Cambridge Econometrics has worked from the 2001 Annual Business Inquiry (ABI) estimates of employees of 164,780. This is 15% higher than the 2001 Census workplace population estimate of 142,800. An adjustment of only 6% is normally taken to be sufficiently robust to reflect people with more than one job, seasonal variations in surveys and unpaid work. Despite the very high baseline estimate of jobs, the forecasts indicates one the lowest rates of employment growth – a 37,200 increase in twenty years, equivalent to 1.1% per annum.

4.35 Experian BSL published two forecasts of employment growth in 2003. It is understood that the forecasts were primarily produced at a regional and then county scale, with district shares based on past economic performance (as evidenced by ABI estimates). The forecasts incorporated as baseline data information available in 2002 – well before the 2001 Census was published. Hence it is not surprising that the estimate of jobs in 2001 (159,240) was subsequently revised downwards when the 2001 Census results showed a workplace population of 142,800.

i) *Experian BSL 'Business as Usual (BAU)' forecast – 2003*: This 'technical' forecast indicated a low rate of job growth amounting to a 41,650 increase over the twenty year period, equivalent to a 1.3% annual increase.

ii) *Experian BSL 'Enhanced Growth by 2021' – 2003*: This forecast was commissioned to illustrate the spatial implications of a goal of the Regional Economic Strategy (RES) 2001 to place the East of England among the top 20 European Regions ranked by gross value added (GVA) per head of resident population. This 'aspirational' forecast indicates that Cambridge and South Cambridgeshire could achieve a net growth in jobs of 49,390 20 years, equivalent to a 1.4% annual increase.

4.36 It is important to note that predictions from this forecast were adopted (at the County level) as the indicative jobs target in Policy E1 of the Secretary of State's revised proposed changes to the draft revision of the RSS. In some areas of the region the 'EG21' forecasts were further enhanced to take account of additional local policies and initiatives to boost employment growth. However, in the case of Cambridgeshire and Peterborough it was accepted that the Structure Plan had already adopted suitable policies to support 'selective' growth, encouraging hi-technology and knowledge-based industries alongside local services.

4.37 The three Experian BSL forecasts published in 2004 were commissioned by the Government Office for the East of England as part of scenario testing for the Stansted expansion study. Produced for every district in the region, these forecasts comprise:

i) *Experian BSL 'Business as Usual' (BAU) forecast – 2004*: This forecast assumes that economic relationships between districts remain as in the past and there no major new policy initiatives are introduced. The forecasts take into account updated Annual Business Inquiry (ABI) data as well as the 2001 Census results. The trend forecast for Cambridge and South Cambridgeshire suggests job growth of around 32,520 over twenty years, a much reduced annual growth rate of 1.0% as compared with the forecasts produced by Experian BSL the previous year. It should be noted that the forecast for Cambridge City was reduced considerably.

ii) *Experian BSL 'Enhanced Growth by 2021' – 2004*: The updated aspirational forecast indicates an increase of 38,340 jobs over twenty years, an annual increase of 1.2%. Again, the anticipated growth is much lower than indicated in the 'EG 21' (2003) forecast (of 49,390 jobs with an annual growth rate of 1.4%). In the run-up to the Examination in Public of the draft East of England Plan, an explanation from Experian BSL was sought for the difference between the 2003 and 2004 forecasts for Cambridgeshire. No conclusive response was forthcoming. However, 2001 Census data suggest lower growth had occurred in Cambridge than had previously been considered.

iii) *Experian BSL 'Unconstrained Growth' – 2004*: This forecast was produced to explore the possible implications of economic growth if there was no need to check population growth – or constrain the sum of individual forecasts to a regional total. For this scenario to make sense there would be no restrictions on house-building rates in Cambridge and South Cambridgeshire. In this scenario, jobs could increase by around 53,490 over twenty years, a rate of 1.7% per annum. This is significantly higher than all other forecasts and possibly explores the potential for development if there were no policies for the 'selective management' of employment development.

4.38 *CE's 'exemplification' of the RSS jobs target for 2005, broken down to districts – 2005*: The last data set is not a true forecast. It represents a breakdown to districts of the sub-regional job targets proposed in the RSS. This breakdown was produced by Cambridge Econometrics in order to test the implications for a three region commuting model. Basically it took as a starting point the Experian BSL 2001 jobs baseline, and adjusted growth to industry sectors based on Cambridge Econometrics experience and their own LEFM model. This scenario suggested an increase of 42,760 jobs over twenty years, an increase of 1.4% per annum.

4.39 The forecasts outlined above are significantly lower than the increase in workplace population that the Population Census suggests was achieved in Cambridge and South Cambridgeshire between 1991 and 2001. However comparing the forecasts against the net growth in jobs achieved in the periods 1991 – 2001 and since 2001 are not straight forward exercises.

4.40 For the first period, the 1991 Census restricted the analysis of workplace data to a 10% sample and did not make allowances for 'imputed' households. In addition, the 2001 Census aimed to estimate the total population of the country, termed a 'One-number' Census. It grossed up responses to achieve this. As a result the apparent growth of 25,700 in the workplace population between 1991 and 2001 (from 117,110 to 142,800) is an over-estimate. The more likely increase is around 21,470 (see Appendix 7). However, the rate of growth achieved over this period, at over 3% per annum, is much higher than forecast for the future.

4.41 For the second period, there are further data problems. Firstly, the forecasts are of jobs, rather than working people. The main data source for monitoring jobs is the ABI, which is a sample survey of employers and provides information on employees, not the self-employed. As Appendix 8 shows, the sampling errors associated with the ABI are quite high and make it virtually impossible to monitor year-on-year change.

4.42 The Annual Population Survey (APS), replacing the Labour Force Survey, is the main source of evidence on working people. The APS surveys households to monitor the resident labour force and employed residents. It asks people where they work and codes their responses to districts to provide workplace population estimates. There are no checks on whether people really do know in which district they work. This is a particular problem in the Cambridge area, where many people assume that the Cambridge Science Park and Marshall of Cambridge are located in Cambridge City, rather than in South Cambridgeshire.

4.43 The latest APS workplace population estimate for South Cambridgeshire stands at 65,600 (March 2006) – indicating little growth since the 2001 Census (64,100). The figure for Cambridge stands at 97,000 against the 2001 Census (78,700) but is not corroborated by any other data source.

4.44 As forecasts are essentially 'trend' based and they assume that population growth is similar to the past – or, at least, the district's share of county/ regional population growth will be similar to the past. They also do not take account of any specific new areas of job growth or decline which are out of line with past experience.

4.45 In this context a number of local factors need to be considered:

- Induced Jobs: With more new houses and higher population growth planned for both Cambridge and South Cambridgeshire, the driver for the growth in jobs linked to local consumers (in retailing, schools, health and personal services) will be more intense than in the past. Subject to the delivery of the planned housing, this suggests rates of job growth above the lower end of the forecasts (although some of the local services are more likely to be provided in Cambridge than in South Cambridgeshire);
- Planned Jobs Gains and Losses: During the plan period to 2021, it is anticipated that Papworth Hospital will move from South Cambridgeshire to Addenbrookes in Cambridge. Marshall of Cambridge, which currently occupies sites straddling the Cambridge and South Cambridgeshire border, may relocate and make room for a mixed use scheme with a significant employment element. In the event of the company not moving then house-building and net job creation would be affected;
- Land Values: The substantial difference between the value of employment and housing land may result in employment land being held vacant in the hope of change of use to housing.

4.46 *Conclusions*: Five of the seven labour demand forecasts produced for Cambridge and South Cambridgeshire since 2001 comprise technical 'business as usual' trends and political aspirations for 'enhanced' and 'unconstrained' growth. Two of the forecasts pre date the publication of the 2001 Census.

4.47 In this context, the forecasts range from a net growth in jobs of between 32,500 and 53,490 in the twenty years 2001 – 2021 (reflecting growth rates of between 1.1% and 1.7% respectively). This range narrows to between 32,500 and 42,760 when the 'enhanced' and 'unconstrained' forecasts are set aside.

4.48 The indicative job target for net growth of 49,390 jobs in the period 2001 – 2021 was adopted from Experian BSL's 'Enhanced Growth by 2021' forecast (published in 2003).

4.49 *Industry Sector Forecasts*: To compare the forecast change in employment in Cambridge and South Cambridgeshire over the period 2001 to 2021 by broad industry sector, the Research Group identified a series of six ‘trend’ and commissioned ‘growth’ forecasts:

- Cambridge Econometrics’ ‘trend’ forecast, 2005, produced for work on the three regions’ commuting study;
- Cambridge Econometrics’ interpretation of the draft Regional Spatial Strategy jobs target for the Cambridge sub-region, broken down to district council areas (which was also produced in 2005);
- Experian BSL’s ‘Enhanced Growth by 2021’ forecast published in 2003 (which was adopted for the RSS indicative job targets);
- Experian BSL’s suite of three forecasts ‘Business as Usual,’ ‘Enhanced Growth by 2021’ and ‘Unconstrained Growth.’ Published in 2004, these forecasts were commissioned by the Government Office for the East of England for the Stansted Airport expansion study

4.50 Of the six forecasts, five were selected as they were produced after the 2001 Census results were published (the exception being the Experian BSL ‘Enhanced Growth by 2021’ forecast which was published in 2003) as:

- the earlier Cambridge Econometrics forecasts only went to 2015 (which was extended to 2016 by the Research Group at the County Council on a trend basis);
- the 2001 Census, although not published for detailed industry sectors, at least provided a valuable check on workplace employment at a broad sector level; and
- the post 2001 Census forecasts also incorporate data from more up-to-date ABI and LFS results.

4.51 Of the forecasts analysed, it is important to note that in all models, Cambridge and South Cambridgeshire has been considered as a sub-area of a regional model. Performance in terms of job growth or decline in the future is very much driven by the districts’ relative performance in the past. No allowance has been made for specific local knowledge. For example, the likely changes in location of medical R&D or aerospace engineering are not explicitly taken into account.

4.52 It is therefore important that the value of the forecasts at a sectoral level should not be over stated. The various forecasts show what is expected to happen if past relationships continue. They are not policy driven at a local level.

4.53 Two comparisons have been made. The first looks at forecast ***job change*** over the period 2001 to 2021 by twelve industry sectors. The second looks at the ***forecast ‘stock’ of jobs in 2021*** by the same twelve sectors. It is somewhat surprising that the two main forecasting consultancies use a different 2001 baseline. This arises because of unexplained differences between the 2001 Census data on workplace employees and the 2001 ABI estimates of employees. Generally, Cambridge Econometrics has worked from the higher ABI baseline. The anticipated changes in jobs over 20 years are summarised in Table 5.

Table 5: Forecast Change in Jobs by Main Industry Sector, Cambridge & South Cambridgeshire combined, 2001 to 2021, various scenarios, ‘000

Industry sector	CE trend 2005	CE interp of RSS target	Exp BSL EG21 2003	Exp BSL BAU 2004	Exp BSL EG21 2004	Exp BSL unconst. 2004
Agriculture etc	-0.84	-1.44	-0.75	-1.44	-1.44	-1.27
Manufacturing, quarrying and utilities	-5.40	-1.97	-2.84	-3.35	-1.95	-1.70
Construction	0.02	-1.24	0.69	-1.50	-1.42	-1.50
Wholesale and retail trade, repairs	3.10	-1.55	2.70	-1.75	-1.91	-1.58
Hotels and catering	3.55	3.23	6.70	2.70	3.04	3.31
Transport, storage and communication	0.03	3.13	0.94	2.17	2.81	2.46
Banking & insurance	-0.63	-0.50	0.12	-0.71	-0.54	-0.69
Business activities, rental, property	23.07	24.13	17.34	20.09	22.36	21.30
Public admin & defence	0.78	-0.50	-0.54	-0.78	-0.85	0.29
Education	7.36	9.17	12.54	8.20	8.44	19.44
Health and social work	3.16	4.56	9.14	4.14	4.17	8.67
Other services	3.00	5.74	3.37	4.75	5.64	4.75
Total	**37.20**	**42.76**	**49.39**	**32.53**	**38.34**	**53.50**

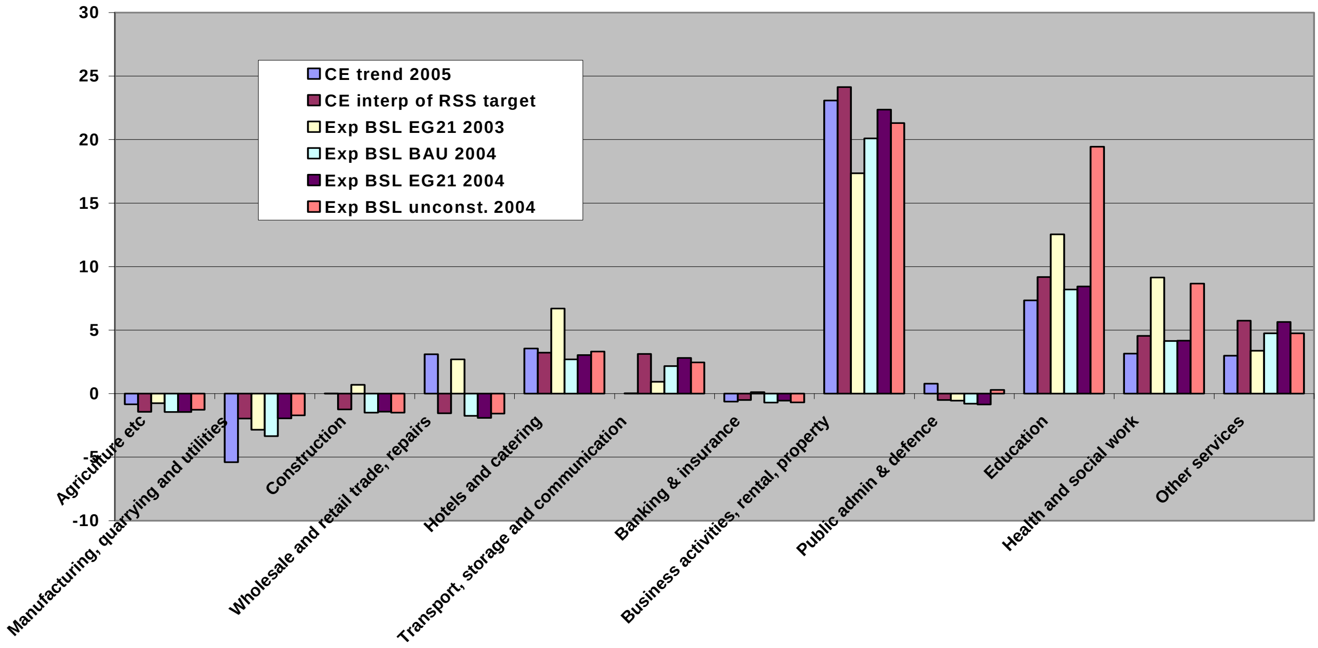
Sources: Cambridge Econometrics, Experian BSL

4.54 *Job Change 2001 to 2021*: The scenarios covered in Table 5 and Figure 3 show total job change varying from just 32,530 to 53,500. In all scenarios it is the 'business activities' sector which is expected to see highest growth, ranging from 17,340 in the Experian BSL 2003 'Enhanced Growth' forecast to over 24,000 in the CE 'trend' forecast. Most of the forecasts indicate a net growth of over 20,000 jobs in this sector which covers a very wide range of employment: technical services; legal; accountancy; R&D; computer services; security services; packaging; industrial cleaning and employment agencies. This last group poses some difficult issues. There is evidence of increasing use of temporary staff in many industries and these are often sourced through employment and recruitment agencies. Whilst the workers are classified as 'business services', they may well be actually working in manufacturing, distribution and transport companies. Unfortunately there is no finer breakdown of the actual work carried out. It should also be noted that some agency workers working outside of Cambridge and South Cambridgeshire may be 'allocated' by the ABI to the offices of employment agencies in Cambridge. Consequently, to the extent that the employment forecasts draw on the ABI, there is a tendency to overestimate employment in the main centres where local offices are based – and staff are 'counted'.

4.55 The other sector where major growth is forecast is education in which net growth in jobs is forecast to range from 7,360 to 19,440 (according to Experian BSL 'Unconstrained' forecast). The average forecast growth is 10,860 jobs in this sector.

4.56 For the majority of the other sectors, only modest changes in employment are indicated. It should be noted that none of the forecasts explicitly take into account the proposed significant increase in house building. Consequently we would expect to see an increase in employment in construction as well as a number of sectors serving the local population, such as: health and social work; other services; hotel and catering and education. All of the forecasts predict continuing job losses in the agricultural and manufacturing sectors.

Fig. 3: Comparison of Forecast Changes in Jobs 2001/21 by Industry Sector, Cambridge City & South Cambridgeshire combined, various sources, '000



Sources: Cambridge Econometrics, Experian BSL

4.57 *Job Stock in 2021*: Table 6 and Figure 4 compare six forecasts of the total stock of jobs in 2021. Of these, the two 'trend' forecasts can be usefully compared as both had access to 2001 Census results. The Cambridge Econometrics (CE) trend forecast indicates just under 202,000 jobs in 2021, around 12,000 higher than Experian BSL 'Business as Usual' forecast of 2004 (190,340).

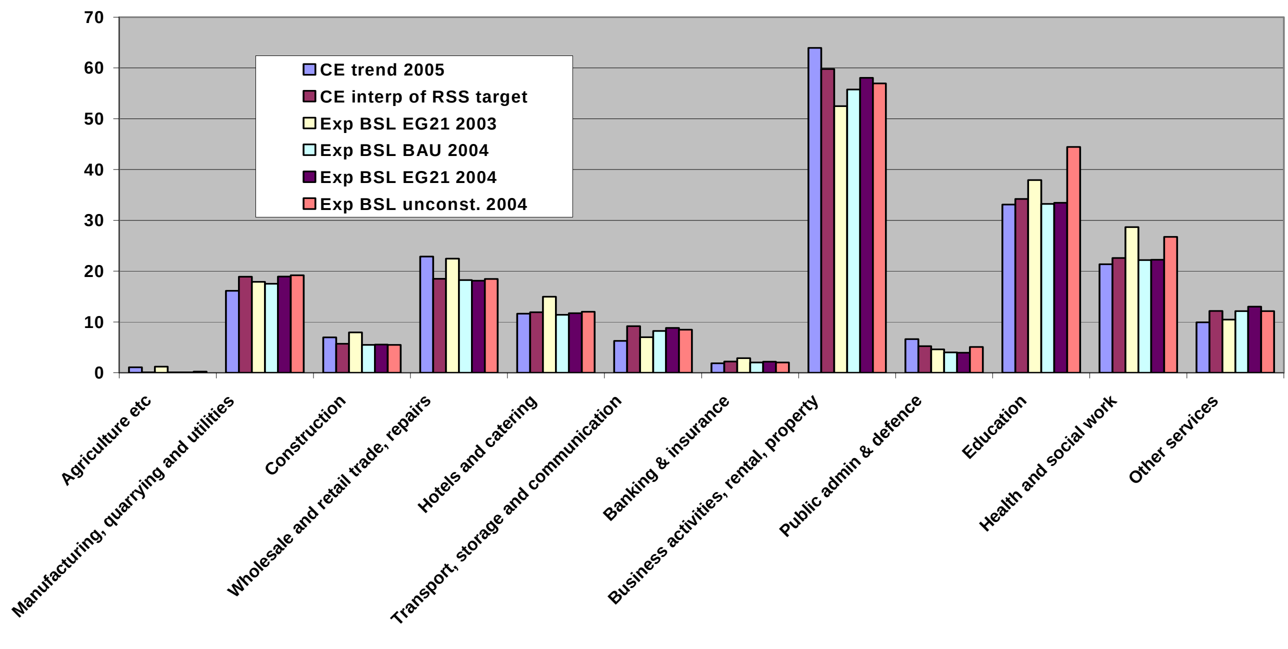
4.58 The CE forecast show that business services (with 63,970 jobs) and education (with 33,130 jobs) will account for 97,100 or 48% of all jobs in Cambridge and South Cambridgeshire in 2021. The Experian BSL forecast predicts 55,770 jobs in business services and 33,230 jobs in education accounting for 46.76% of all jobs.

Table 6: Stocks of Employment (Jobs) by Main Industry Sectors, Cambridge City & South Cambridgeshire combined, 2021, various forecasts, '000

Industry sector	CE trend 2005	CE interp of RSS target	Exp BSL EG21 2003	Exp BSL BAU 2004	Exp BSL EG21 2004	Exp BSL unconst. 2004
Agriculture etc	1.09	0.08	1.23	0.07	0.08	0.25
Manufacturing, quarrying and utilities	16.17	18.92	17.91	17.54	18.95	19.19
Construction	6.98	5.72	7.95	5.47	5.55	5.47
Wholesale and retail trade, repairs	22.88	18.49	22.48	18.28	18.12	18.45
Hotels and catering	11.66	11.92	14.96	11.39	11.73	12.00
Transport, storage and communication	6.30	9.16	7.04	8.22	8.85	8.50
Banking & insurance	1.85	2.22	2.87	2.01	2.18	2.02
Business activities, rental, property	63.97	59.82	52.50	55.77	58.05	56.99
Public admin & defence	6.63	5.26	4.61	4.02	3.94	5.08
Education	33.13	34.21	37.94	33.23	33.47	44.47
Health and social work	21.40	22.62	28.69	22.21	22.23	26.74
Other services	9.93	12.16	10.48	12.14	13.03	12.14
Total	**201.98**	**200.57**	**208.63**	**190.34**	**196.16**	**211.31**

Sources: Cambridge Econometrics, Experian BSL

Fig. 4: Forecasts of Total Jobs by Industry Sector, Cambridge City & South Cambridgeshire combined, 2021, various sources, '000



Sources: Cambridge Econometrics, Experian BSL

4.59 *Jobs and Workplace Population*: It has already been explained (in section 4.31) that there are more jobs than working people, as some individuals hold two or more posts. The Labour Force Survey (LFS) asks respondents about the numbers of jobs they have and for some years the responses have indicated around 5% of people have more than one job. This question is not asked in the Population Census and the sample size in the LFS prevents any reliable estimates being published at a district or even county level.

4.60 Only two of the labour demand forecasts analysed have complementary 'workplace population' interpretations and these are only available as total figures: they are not broken down by industry sector. Cambridge Econometrics produced a district series of workplace population forecasts for their '3 regions' commuting model. Both the CE 'trend' and 'RSS targets' jobs forecasts have an associated workplace population.

4.61 Cambridge Econometrics has provided a description of how the workplace population forecasts have been derived. They take into account the industry structure of each district at 2001, analysed to show the extent of part-time working. The forecasts consider the likely job change by industry sector – and indicate that some sectors with significant numbers of part-time jobs are expected to grow quickly. The analysis also takes account of the relationship between Census-derived estimates of the workplace population as at 2001 and the ABI-derived estimates of jobs.

4.62 Table 6 provides an overview of the different jobs/workplace population figures that relate to Cambridge Econometrics 'trend' forecast for both Cambridge City and South Cambridgeshire:

Table 6: Forecasts of Jobs and Workplace Population, Cambridge Econometrics 'Trend' (2005), Cambridge City & South Cambridgeshire

District	Jobs 2001	Workplace population 2001	Jobs 2021	Workplace population 2021	Job change 2001/21	Workplace population change 2001/21
Cambridge City	98,500	79,000	114,000	90,000	15,500	11,000
South Cambridgeshire	66,000	64,000	88,000	82,000	22,000	18,000
City & South Cambs	**164,500**	**143,000**	**202,000**	**172,000**	**37,500**	**29,000**

Source: Cambridge Econometrics

4.63 The forecast of job growth over the twenty years 2001 to 2021 is 37,500 for Cambridge and South Cambridgeshire – but is a lower 29,000 when jobs are re-cast as workplace population.

4.64 The 'RSS target' forecasts produced by Cambridge Econometrics show, for Cambridge and South Cambridgeshire, an increase of 42,700 jobs over 20 years and a lower 38,400 increase in workplace population. The explanation of the difference between the two forecasts is that most job growth under this scenario occurs in industries and occupations which are dominated by full-time employment, such as professional services (see below).

4.65 The important message from this analysis is that fewer 'workers' will be needed to fill the net growth in jobs.

4.66 *Conclusions and Implications*: The analysis has shown that future resident labour supply will be determined by a complex set of inter relationships. These include housing growth, new migrant labour, mortality rates, headships rates and economic activity rates. The latter rates will be affected by changes to the pension system and local labour demand. In turn future labour demand will be determined by a different, but linked, set of inter relationships including the sectoral composition of the local economy and the growth in the local population.

4.67 To produce forecasts demographers and econometricians seek to model these respective inter relationships. However these models vary from each other and reality due to:

i) structural weaknesses in the design of models as:

- official data is unavailable for important factors, for example migrant labour; and

- trend based models cannot anticipate trend breaking events.

ii) practical weaknesses in the application of models as:

- different data sets are used as inputs, for example, pre and post 2001 Census data;

- different assumptions (both technical and political) are used to calibrate models; and

- data which are only statistically robust at national and regional levels are sometimes applied at the district level.

4.68 As a result of variations in the design and application of models, it can be predicted and observed that models produce a wide range of results for the same forecasts.

4.69 The analysis has shown that the Experian BSL 'Enhanced Growth by 2021' jobs forecast published in 2003 and related forecast for growth in the resident labour supply informed the indicative targets in RSS Policy E1: Jobs Growth 2001 – 2021.

Areas	**Policy E1: Jobs Growth**	**EG21 Jobs Forecasts**	**RSS Submitted Resident Labour Supply**	**Dwellings Provision**
Cambridge		31,780	29,050	19,000
South Cambs		17,610	20,400	23,500
Cambridge + S Cambs		49,390	49,450	42,500
Cambridgeshire	75,000	73,700		73,300

4.70 The indicative target for Cambridgeshire is for the net growth of 75,000 jobs in the period 2001 – 2021. Of this target 49,390 jobs are to be provided in Cambridge (31,780) and South Cambridgeshire (17,610) with a complementary forecast increase in the labour supply of 49,450 (Cambridge 29,050 and South Cambridgeshire 20,400) and a supporting target for 42,500 new dwellings (Cambridge 19,000 and South Cambridgeshire 23,500).

4.71 However more recent – and more robust – forecasts predict:

- a lower rate of growth in jobs than assumed in the RSS (due to the RSS target being based on a political aspiration); and

- a lower rate of growth in the resident labour supply than assumed in the RSS (due to falling economic activity rates and rising 'headship' rates).

4.72 The more recent forecasts incorporate the RSS dwelling targets but for these to be met the rate of completions in Cambridge and South Cambridgeshire will need to double from 1,160 p.a. (in the period April 2001 – March 2006) to 2,440 p.a. (from April 2006 – March 2021).

Forecasts of Labour Demand (Jobs), Cambridge and South Cambridgeshire

	Experian BSL 'EG 21' 2003			**Experian BSL 'EG 21' 2004**		
	2001	2021	Growth	2001	2021	Growth
Cambridge	95,580	127,360	31,780	91,820	114,360	22,540
South Cambs	63,700	127,360	17,600	66,000	81,800	15,800
TOTAL	159,280	208,660	**49,380**	157,820	196,160	**38,340**

Forecasts of Resident Labour Supply, South Cambridgeshire and Cambridge

	RSS Submitted			**RSS July 2006 update ONS '06**		
	2001	2021	Growth	2001	2021	Growth
South Cambs	71,200	100,250	29,050	71,200	94,450	23,250
Cambridge	52,500	72,900	20,400	52,500	71,250	18,750
TOTAL	123,700	173,150	**49,450**	123,700	165,700	**42,000**

4.73 The forecasts used in the RSS have been selected to support two basic policy stances: the growth in jobs and to seek as far as possible to ensure development results in better, not worse alignment between homes and jobs. Subject to the achievement of the dwelling targets, the updated forecasts suggest that the increase in labour supply and double jobbing will result in a better alignment between homes and jobs in South Cambridgeshire and Cambridge City. For example, CE has calculated that 29,000 more people in the resident labour supply could fill 37,500 additional jobs in Cambridge and South Cambridgeshire

4.74 The Secretary of State noted, in the proposed changes to the draft revision to the RSS, 'the evidence was not sufficiently robust to set any more than indicative (job) targets. Job growth, its broad alignment with housing and how best to monitor changes in the labour market are all issues that should be reconsidered as part of the review of the RSS and IMP3….The aim will be to produce more robust and readily monitorable targets, and to express these at district level, albeit with a degree of flexibility at local level'.

4.75 Notwithstanding the Secretary of State's comments, the draft East of England Plan Policy E1 requires that local development documents should provide an enabling context to achieve the (indicative job) targets. Achievement of the aspirational target of net growth of 49,380 jobs in Cambridge and South Cambridgeshire between 2001- 2021 would support two basic policy stances of the RSS: growth in jobs and better alignment between homes and jobs.

Quantify Employment Land Supply

4.76 The guidance advises:

- a stock analysis of land and premises;
- a flow analysis to calculate the annual average take up of employment land; and
- reconciling stock and flow analyses to draw clear conclusions about the recent pattern of take up of sites by market segment.

4.77 *Stock Analysis of Land*: To quantify the supply of employment land, the Councils undertook a survey of 98 employment areas identified under Stage One to:

- identify undeveloped sites and sites subject to redevelopment proposals;
- assess the deliverability of these sites; and
- assess the potential categories of development on these sites.

4.78 The analysis identified 29 employment areas with potential for development. The assessment of the availability of these sites identified two sites which had not been brought forward for development. These sites are the subject of further appraisal under Stage Three.

4.79 The 29 sites were allocated into the following development categories: R&D, offices and light industry and warehousing. The allocations were made in accordance with outstanding planning consents. For sites without planning consents, judgements on allocations were based on development plan documents (where available) and the nature of development on neighbouring sites. It should be noted that the analysis presents just one view of the development potential and deliverability of the stock of previously undeveloped employment land.

4.80 The analysis of the stock of previously undeveloped employment land identified a potential supply of 848,000 sq m on 176 ha of which 199,000 sq m on 37.4 ha is constrained. Of the overall supply, 33.7 ha are located in Cambridge, 111.8 ha north and west of Cambridge and 30.8 ha south and east of Cambridge. A summary is shown below and in more detail in Appendix 10.

PREVIOUSLY UNDEVELOPED EMPLOYMENT LAND SUPPLY 2007

Market Area	R&D	Offices	Light and General Industry W'housing	Total	Constrained Land
Cambridge	23.42	2.32	0	25.74	8
North and West of Cambridge	31.61	23.93	26.921	82.461	29.38
South and East of Cambridge	26.47	0	4.33	30.8	0
Total ha	**81.5**	**26.25**	**31.251`**	**139**	**37.38**

4.81 The analysis of employment areas identified a supply of 139 ha of potentially deliverable previously undeveloped employment land.

Flow Analysis

4.82 To calculate the annual average take up of employment land, the Councils carried out an analysis of development completed since 1998. The Councils used Cambridgeshire County Council's monitoring data of planning consents and produced maps of the District's employment sites to show: allocated land without planning consent; land with unimplemented planning consents and implemented planning consents. This data was checked through site visits. Employment land gains and losses arising from developments since 1998 were categorised by property sub market areas and development types: light industry/ warehousing; offices and R&D.

EMPLOYMENT LAND GAINS AND LOSSES SINCE 1998

Market Area	Light Industry Warehousing	Offices	R&D	Total
Cambridge:				
Gains	3.65	5.67	5.99	15.31
Losses	38.3	8.54	4.67	51.51
South Cambs:				
North and West				
Gains	7.93	18.72	14.83	41.46
Losses	0.34	-	-	0.34
South and East				
Gains	1.76	5.03	22.69	29.48
Losses	1.36	-	-	1.36
TOTAL GAINS	**14.38**	**29.32**	**44.1**	**86.25**

4.83 The analysis and survey found that 86 ha of previously undeveloped employment land were taken up during the eight years from 1998 whilst 53.21 ha of previously developed employment land were lost to other uses.

4.84 *Reconciling Stock and Flow Analysis*: The projection of recent rates of take up is a recognised method for predicting employment land requirements. The analysis of gains and losses of employment land in Cambridge and South Cambridgeshire for the seven and a quarter year period from the end of 1998 to March 2006, revealed an annual net take up rate of 4.56 ha (arising from a gross take up rate of 11.9 ha pa and a loss of 7.34 ha pa). The projection of the net take up rate for the period 2001 – 2021 suggests a requirement of 91.2 ha (against the consented and allocated employment land supply of 176 ha). However, during the period 1998 – 2006, two policies combined with market pressures to:

- support the change of use of employment land to housing and retail uses following the closure or relocation of manufacturing firms in Cambridge; and

- direct development of (mostly) R&D schemes to the periphery of the built up area of Cambridge and elsewhere in South Cambridgeshire.

4.85 Existing and emerging policies will combine to reverse these trends by safeguarding employment land from pressures for change of use and directing development, following the sequential approach, to within and on the periphery of the built up area of Cambridge and then to Northstowe. The analysis therefore turns to a further methodology: the translation of employment forecasts to land requirements.

Translate Employment Forecasts to Land Requirements

4.86 The government's guidance identifies relationships which may need to be quantified when translating employment forecasts to land requirements:
i) employment by SIC sectors and types of property occupied by these sectors;
ii) employment in B use class property to floorspace (employment density);
iii) floorspace to site area (plot ratio) and hence land for B use classes required.

4.87 To apply this approach, the Councils adopted the following assumptions:

- allocated jobs, in sectors where jobs growth translate into B1 use class accommodation, between light industrial, offices and warehousing (in accordance with Box D1 of the Government's guidance and additional assumptions as required);
- assumed that office and R&D accommodation would be occupied sequentially in higher density 'city' offices and then lower density out of centre offices;
- assumed gross floorspace per ha at 4,200 sq m for light industrial, 5,000 sq m for warehousing (following Box D 7 of the Government's guidance) and 6,809 sq m for city offices and 3,282 sq m for out of centre offices (in accordance with outstanding consents);
- assumed jobs per net internal sq m at 38.2 sq m for light industrial, 78.2 sq m for warehousing and 19 sq m for financial and professional services for offices (following DTZ Pieda's data from 1,000 firms employing over 10,000 people in the South East, shown in Box D 5 of the Government's guidance); and
- assumed that net lettable floorspace is calculated by reducing gross floorspace by 10% for light industrial, 5% for warehousing and 20% for offices (following page 96 of the Government's guidance).

4.88 On the basis of these assumptions, the Councils applied the model for job forecasts for Cambridge and South Cambridgeshire for two forecasts prepared by Experian BSL in 2003 and 2004.

SIC	**Use Class**	**BSL Experian 'EG 21' 2003**	**BSL Experian 'EG 21' 2004**
Primary and utilities	-	- 750	- 1,440
Manufacturing	B2	- 2,840	- 1,950
Construction	-	690	- 1,420
Wholesale	B8	2,700	-1,910
Retail	A1	As above	As above
Hotels and Restaurants	A3 and C1	6,700	3,040
Transport and Communication	Some B	940	2,810
Financial Services	B some A2	120	- 540
Business Services	B some A2	17,340	22,360
Public Administration	Say B	- 540	- 850
Health and Education	C and D, some B	12,540 (ed) 9,140 (health)	8,440 (ed) 4,170 (health)
Other Services	A little B	3,370	5,640
Total		**49,390 jobs**	**38,340 jobs**

i) BSL Experian's 'Enhanced Growth' by 2021 (2003) forecast of 49,390 jobs:
Under the 2003 forecast (which informed the indicative net growth in jobs targets in the RSS), 20,045 jobs (or 40.6% of predicted net growth in jobs) were assigned to B use classes.

Key assumptions were:
540 B8 jobs arise from 20% of jobs growth in the wholesale sector including retail;
752 B1 jobs arise from 80% of the jobs growth in the transport and communications sector;
540 B1 jobs lost in public administration are offset by a gain of 4,336 B1 based jobs arising from 20% of the jobs growth in the health and education sector; and
337 B1 jobs arise from 10% of jobs growth in the other services sector.

Manufacturing: loss of 2,840 jobs in B2 at 38.2 sq m per job = 108,488 sq m
108,488 sq m + 10% = 119,337 sq m at 4,200 sq m per ha = *Loss up to 28.4 ha*

Warehousing: gain of say 540 jobs in B8 at 78.2 sq m per job = 42,228 sq m
42,228 sq m + 5% = 44,339 sq m at 5,000 sq m per ha = *Gain up to 8.9 ha*

High Density Offices: gain 16,245 jobs in the Cambridge Urban Area and Northstowe at 19 sq m per job = 308,655 sq m + 20% = 370,386 sq m (which assumes high and low density B1 (a) and B1 (b) unconstrained and constrained floorspace is taken up on a pro rata basis) at an average density of 6,809 sq m per ha = *Gain up to 54.4 ha*

Low Density Offices: gain 6,100 jobs in out of centre offices at 19 sq m per job = 115,900 sq m + 20% = 139,080 sq m at 3,282 sq m per ha = *Gain up to 42.4 ha*

ii) BSL Experian's 'Enhanced Growth' by 2021 (2004) forecast of 38,340 jobs:
Under the 2004 forecast, 23,972 jobs (or 62.5% of predicted net growth in jobs) were assigned to B use classes.

Key assumptions were:
382 B8 jobs lost from 20% of the jobs decline in the wholesale sector including retail;
2,248 B1 jobs arise from 80% of jobs growth in the transport and communications sector;
850 B1 jobs lost in public administration are offset by a gain of 2,522 B1 based jobs arising from 20% of the jobs growth in the health and education sector; and
564 B1 jobs arise from 10% of the growth in jobs in the other services sector.

Manufacturing: loss of 1,950 jobs in B2 at 38.2 sq m per job = 74,490 sq m
74,490 sq m + 10% = 81,939 at 4,200 sq m per ha = *Loss up to 19.5 ha*

Warehousing: loss of 382 jobs in B8 at 78.2 sq m per job = 29,872 sq m
29,872 sq m + 5% = 31,366 sq m at 5,000 sq m per ha = *Loss up to 6.3 ha*

High Density Offices: gain 19,123 jobs in Cambridge Urban Area and Northstowe at 19 sq m per job = 363,337 sq m + 20% = 436,004 sq m at 6,809 sq m per ha = *Gain up to 64 ha*

Low Density Offices: gain 7,181 jobs in out of centre offices at 19 sq m per job = 136,439 sq m + 20% = 163,727 sq m at 3,282 sq m per ha = *Gain up to 49.9 ha*

EMPLOYMENT FLOORSPACE AND LAND REQUIREMENT FORECASTS 2001 - 2021

Forecasts	B2	B8	High Density Offices	Low Density Offices	Gross Total
i) Experian BSL 'EG 21' 2003 Floorpsace sq m Land ha	- 119,337 (- 28.4)	44,339 (8.9)	370,386 (54.4)	139,080 (42.4)	553,805 sq m (105.7 ha)
ii) Experian BSL 'EG 21' 2004 Floorspace sq m Land ha	-81,939 (- 19.5)	- 31,366 (- 6.3)	436,004 (64)	163,727 (49.9)	599,731 sq m (113.9 ha)

4.89 Local authorities have been advised by Government to make provision in their Core Strategies for a seventeen supply of housing and wider policy seek to align homes with jobs. In accordance with this advice, the Cambridge City Council is seeking to provide employment land for the two years to 2009 (when it is anticipated the Cambridge City Core Strategy will be adopted) and seventeen years thereafter to 2026.

4.90 Notwithstanding technical issues, the adjustment of the above forecasts from the twenty years from 2001 – 2021 to the nineteen years from 2007 – 2026 on a straight line basis would translate into net requirements of:

- 526,114 sq m on 100 ha with potential to accommodate just over 19,000 jobs;
- 569,744 sq m on 108 ha with potential to accommodate 22,800 jobs.

4.91 The application of the model showed that 23,972 jobs would need to be accommodated in B use class space under the lower overall forecast of 38,340 jobs whilst 20,045 jobs would need to be accommodated under the higher overall forecast 49,390 jobs. This paradox shows the sensitivity of the model to different assumptions about the allocation of employment growth between different sectors. The Government's guidance acknowledges this point and notes sensitivity testing often create 'a very wide range of future land requirements which is difficult to interpret when preparing policies and site specific proposals in LDFs' (ODPM, 2004:48).

Vacancies, Renewal and Development Pipeline

4.92 In addition to forecast changes in employment, it also necessary when calculating future employment land requirements to take into account current vacancies, renewal of the existing stock and the operation of the development process which is known as the development pipeline.

4.93 *Vacancies*: There is no evidence base for determining whether there is too much or too little vacant commercial property but the normal level of vacancies is generally held to be 7.5% of the stock. On this basis the market is in disequilibrium when:

- vacancies are more than 7.5%: the market is oversupplied and this surplus needs to be added to the supply available to accommodate forecast growth in demand;

- vacancies are less than 7.5%: the market is undersupplied and this deficit needs to be subtracted from the supply available to accommodate forecast growth in demand.

Offices, Industrial and Warehousing Stock and Vacancies

	Offices (sq m)	Industrial / Warehousing (sq m)
Stock (sq m) +	797,000	1,216,000
Equilibrium Vacancies	59,775 (7.5%)	91,200 (7.5%)
Actual Vacancies *	88,250 (11%)	40,877 (3.36%)
(Over) under supply	(28,475)	50,323
(0ver) under supply (ha)	(4.18 ha)	10.94 ha

+ ONS Commercial and Industrial Floorspace and Rateable Valuation Statistics 2004
* Savills' Eastern Region Commercial Survey Autumn 2007

4.94 The data shows that in late 2007 88,250 sq m of offices were vacant which amounted to 11% of the stock. Within this stock there were imbalances between:

i) the quality of supply and demand: secondary stock amounted for 58,500 sq m (or 66%) of vacant offices whilst demand was for Grade A offices;

ii) the location of supply and demand: out of town schemes accounted for 62,000 sq m (or 70%) of the vacant offices whilst in the city centre there were no Grade A offices available to meet active requirements for 37,000 sq m of Grade A offices from, among others, locally based professional firms.

4.95 At the same time 40,877 sq m or just over 3% of the industrial and warehousing floorspace was vacant. This stock was inflated by the inclusion of 15,000 sq m of development under construction at King's Court, King's Hedges, Cambridge; Papworth Business Park, Papworth Everard and Buckingway Business Park, Swavesey.

4.96 The need to safeguard the existing the existing stock and add to the employment land requirements for industrial (B1 c and B2) and small scale warehousing (B 8) was underlined by Savills' statement, 'in general there is a shortage of good quality industrial space in Cambridge and this is particularly so in central Cambridge and along the M11 corridor around the city.'

4.97 *Renewal*: Given the age profile of the existing stock, it is estimated that up to 10% of the stock could be subject to renewal during the plan period 2007 – 2026. On this basis the demand for renewal would add up to 38.13 ha to the overall land requirement. Of this demand it is assumed that 50% would be met through in situ redevelopment of existing employment land.

Offices, Industrial and Warehousing Stock: Renewal

	Offices (sq m)	Industrial / Warehousing (sq m)
Stock *	797,000	1,216,000
Renewal of 10% of stock 2001/21	79,700	121,600
Renewal in situ 50%	39,850	60,800
Land required for renewal	5.85 ha (at 6,809 sq m per ha)	13.22 ha (at 4,600 sq m per ha)

* ONS Commercial and Industrial Floorspace and Rateable Valuation Statistics 2004

4.98 *Development Pipeline*: The development pipeline encompasses all of the activities from the allocation of a site to the take up of newly built accommodation. The size of the development pipeline is equal to the amount of land developed in any one year multiplied by the number of years required from allocation to completion and occupation. There is no evidence base for calculating the average number of years employment land is in the pipeline but an estimate of five years or more would be appropriate in Cambridge and the South Cambridgeshire where:

- development is complex, for example in new settlements such as Northstowe and Cambridge East;
- strategic employment sites are developed over a long time horizon, notably the Cambridge Science Park where development started in 1973 and some land remains within the development pipeline; and
- land allocations are held for specific uses, for example at the Genome Campus, Hinxton, Brabraham Institute, Brabraham and the University sites at west of Cambridge, North West of Cambridge and Addenbrookes.

4.99 To calculate the land required for the development pipeline, Roger Tym and Partners use as a proxy the average gross take – up for the years for which data is available as opposed to the forecast rate of take up. For the period from the end of 1998 to March 2006, gross take up was around 10.13 ha pa for R&D and office schemes and 1.98 ha for industrial and warehousing development. Given the profile of previously undeveloped employment in Cambridge and South Cambridgeshire, the average time for land to be in the development pipeline is assumed to be a conservative six years. On the basis of these assumptions, 60.78 ha for R&D and offices and 11.88 ha for industrial and warehousing development would need to be added to the overall employment land requirement. Assuming effective safeguarding policies, at least 15 ha could be met through recycling of 75% of the 19.5 to 25.8 ha of employment land which is forecast to be released for industrial purposes.

4.100 Given the scope and scale of the existing supply of employment land, provision for the development pipeline at the beginning of the plan period is in excess of six years. However this provision will decline as development proceeds during the next few years. In this context the scope and scale of the pipeline will need to be monitored in order to ensure there is appropriate provision of employment land towards the end of the plan period

Scenario Building

4.101 To address the problem arising from sensitivity testing, the guidance notes a particular value of scenarios is to inform strategies and policies under alternative futures and the implications for future business space requirements.

4.102 For Cambridge and South Cambridgeshire three scenarios were selected: the 'New Usual for Business' scenario, the' Low Congestion/ Low Carbon' scenario and 'R&D Relegation' scenario.

i) 'A New Usual for Business' scenario

This scenario assumes the success of the vision for the Cambridge Sub – Region to continue to develop as a centre of excellence and world leader in the fields of higher education and research and further expansion of the knowledge based economy.

In accordance with this success, the scenario adopts the floorspace requirements calculated from the Experian BSL 'EG 21' 2004 forecast (as these requirements are higher than for those calculated under the 'EG 21' 2003 forecast which forms the basis of the RSS indicative target for the net growth 49,390 jobs by 2021).

The scenario anticipates the acceleration of the redevelopment and intensification of employment land in Cambridge in accordance with the RSS Policy CSR1 to make the most of the development potential of land in the following order of preference:

- in the built up area of Cambridge, subject to considerations of environmental capacity;
- on the periphery of the built - up area of Cambridge; and
- at the new settlement of Northstowe, linked to the guided busway; and
- on land within or on the peripheries of the sub region's market towns and within key services centres.

In this context it is assumed that:

- Office and R&D sites will be developed at high densities, for example, CB1, Station Road, Cambridge, Addenbrookes 2020, Napp Pharmaceuticals at Cambridge Science Park and Northstowe;
- Existing, low density, R&D schemes within or on the periphery of the built area of Cambridge will be the subject of either redevelopment or intensification.

ii)' Low Congestion/ Low Carbon Future'

This scenario adopts and builds on the assumptions of the 'New Usual for Business'' scenario. It assumes the success of the vision for the Cambridge Sub – Region, adopts the floorspace requirements calculated from the Experian BSL 'EG 21' 2004 forecast and anticipates the acceleration of the redevelopment and intensification of employment land in Cambridge in accordance with the RSS Policy CSR1.

This scenario foresees changing public and consumer demand requiring EU and Government incentives and rules for businesses to reduce CO_2 emissions.

Under this scenario, trend breaking events and policies are envisaged such as:

i) zero carbon development: building regulations require developers to provide low carbon/ high comfort buildings;

ii) modal shift: rising oil prices stimulates a shift from the private car to public transport making Cambridge a more favoured locations for businesses and labour seeking a high quality of life and low carbon environment;

iii) development for the low carbon era: zero carbon development and communities stimulates the in situ redevelopment and intensification of employment land in Cambridge along with large scale mixed use schemes linked to on and off site renewable energy generation at Northstowe and Cambridge East.

iii) R&D Relegation

This scenario adopts two key assumptions from the other scenarios: the acceleration of the redevelopment and intensification of employment land in Cambridge in accordance with the RSS Policy CSR1 and the measures needed to make progress towards the Government's target to reduce CO_2 emissions by 60% by 2050.

This scenario though challenges the vision for the Cambridge Sub – Region to continue to develop as a centre of excellence and world leader in the fields of higher education and research and further expansion of the knowledge based economy.

This scenario argues that this vision is based simply on the assumption that the trends of the last thirty years will continue. Whilst the UK accounts for 5% of global investment in basic science and invests 1.8% of GDP into R&D, there is no overarching national or regional strategy specifically for the Sub Region to counter threats to and exploit opportunities to build on its 'world leadership' roles.

This scenario suggests the market itself may challenge the sub – region's 'world leadership' roles by:

- the off shoring of R&D (for example 'big pharma' - the UK's biggest R&D investors - could locate future R&D investment in the USA and developing countries as locations with respectively the largest and fastest growing markets);
- investing in other high technology locations as the Sub Region lacks the critical mass to develop the new wave of products and services based on two or more technologies; and as a result
- continuing to constrain the Sub Regional high technology production system as a 'creative catalyst' (in which venture capital enables start ups but prepares them for early sale, a norm which is known as 'the sell out culture').

It is also predicted that in the face of market failure to maintain 'world leadership,' local institutions through their path dependency would fail to adapt and enable alternative possibilities for economic growth.

Conclusions

4.103 The purposes of Stage Two are to provide a quantitative assessment of future employment land requirements for the plan period, a quantitative assessment of suitable employment land stock remaining from Stage One and an analysis of the likely 'gap' in supply to be filled.

4.104 In accordance with Government policy and selective management, the Councils were concerned to bring forward sufficient land of a suitable quality in the right locations to meet expected needs for industrial and commercial development, to provide for growth and consumer choice, taking into account accessibility and sustainable transport needs and the provision of essential infrastructure.

4.105 Under Stage Two, the Councils sought to define 'sufficient land' by:

- paying regard to the indicative targets for net growth in jobs in draft RSS Policy E1 and applying the Government's guidance to translate these targets into employment land requirements (i.e. to accommodate predicted growth in jobs in sectors requiring property within the B1, 2 and 8 use classes);

- providing for nineteen years supply comprising the two years to 2009 (when it is anticipated the Cambridge City Core Strategy will be adopted) and seventeen years supply thereafter to 2026; and

- taking into account vacancies, the need for renewal of the stock and provision for the development pipeline.

4.106 The guidance counsels that the best approach to quantitative assessment is 'to deploy several complementary methodologies and make the best possible judgement based on the available evidence.' The guidance concludes 'quantitative assessments of employment land requirements are not reliable over the time horizons of Regional Spatial Strategies. They need to be updated regularly, at no more than five yearly intervals, as part of the 'plan, monitor and manage' approach to the continual review of RSSs and LDFs' (ODPM, 2005: 51).

4.107 The Councils' application of three quantitative methodologies resulted in a wide range of employment land requirements for the period 2001 - 2021. These results highlighted the sensitivity of different assumptions underlying the three methodologies:

i) property trend based forecast: the requirement for 91 ha was calculated by projecting a net requirement of 33.04 ha identified for the seven and a quarter years to March 2006 (arising from the loss of 53.21 ha and gain of 86.25 ha of employment land)

ii) econometric based forecasts: the translation of two employment demand forecasts into employment land requirements identified a gross requirement of 105.7 ha to accommodate 20,000 workers in 553,805 sq m and 113.9 ha to accommodate 24,000 workers in 599,731 sq m of floorspace; and

iii) scenario building: alternative scenarios enabled the Council to consider how policies and economic conditions could reshape the location and density of development as well as overall demand for employment floorspace.

4.108 To the land requirements arising from the three methodologies the Councils calculated the impact on supply and demand of vacancies, renewal and the development pipeline.

4.109 The analyses have concluded that structural change in the economy and selective management will drive demand for office and R&D accommodation. Scenario building predicted policies and market conditions which will encourage the acceleration of development and intensification of employment land within and on the periphery of Cambridge.

GROSS EMPLOYMENT FLOORSPACE AND LAND REQUIREMENTS 2001 – 2021

Forecasts 2001 - 21	Light Industry Warehousing	Offices	Gross Total
1) Historic take up rate (1998 – 2006)			91 ha
2) Demographic and Econometric based: i) Experian BSL 'EG 21' (2003) + 20,045 jobs in B use ii) Experian BSL 'EG21' (2004) + 23,972 jobs in B use	 - 119,337 sq m - 28.4 ha (ind) + 44,339 sq m + 8.9 ha (who) - 113,305 sq m - 25.8 ha	 + 509,466 sq m + 96.8 ha + 599,731 sq m + 113.9 ha	 + 553,805 sq m + 105.7 ha + 599,731 sq m + 113.9 ha
3) Vacancies	10.94 ha	(4.18 ha)	6.76 ha
4) Renewal (50% green field)	13.22 ha	5.85 ha	19.07 ha
5) Gross requirements (2003 forecast)	33.06 ha	98.47 ha	131.53 ha
6) Pipeline (based on forecast requirements)	9.92 ha	29.54	+ 39.46 ha
7) Industrial land forecast to be made available (75% of 2 i above)			- 21.3 ha
NET REQUIREMENT (5+6-7)			**149.69 ha**

EMPLOYMENT LAND SUPPLY 2007

	Light Industry Warehousing	High Density Offices	Low Density Offices	TOTAL
Unconstrained supply: - Potential floorspace - Land	118,706 sq m 31.251 ha	339,571 sq m 49.87 ha	189,980 sq m 57.88 ha	648,257 sq m 139 ha
Constrained supply: - Potential floorspace - Land	34,000 sq m 8 ha	153,000 sq m 25 ha	12,500 sq m 4.38 ha	199,500 sq m 37.38 ha

4.110 The forecasts show that the current unconstrained supply of employment land may be insufficient to ensure the availability of a sufficient quantity, quality and choice of sites throughout and beyond the end of the plan period. This finding underpins the case for bringing forward the constrained land most notably at Cambridge East and identifying additional sites to be brought forward under Stage Three. The supply side issues concern:

i) conformity with the RSS: to address gaps by making specific provision for high technology clusters (in accordance with RSS Policy E4) and essential services (in accordance with RSS Policy CSR 2);

ii) changing circumstances: to put in place contingency options to anticipate the failure to bring forward land for development during the plan period; and

iii) choice: to maintain continuity of choice as land is taken up through the plan period; and

4.111 Planning and delivering sites for the low carbon future will require schemes with on and off site renewable energy at locations which are accessible by sustainable modes of transport: at existing and potential railway stations and in high quality public transport corridors. These requirements point to the need for one or more large scale allocation to provide employment land towards the end of and beyond the plan period.

5 STAGE THREE: IDENTIFYING A 'NEW' PORTFOLIO OF SITES

Introduction

5.1 The Government's guidance sets out a four step process for Stage Three, 'Identifying a 'New' Portfolio of Sites.' These steps are to: devise qualitative site appraisal criteria; confirm existing sites to be retained or released and define gaps in portfolio; identify additional sites to be brought forward and complete and present the employment land review.

5.2 The guidance states that the outcome of Stage Three should be a portfolio of sites that will meet local and strategic planning objectives while serving the requirements of businesses and developers.

Devise Qualitative Site Appraisal Criteria

5.3 The guidance provides a set of criteria and indicators to be used for reviewing the quality and availability of the existing portfolio of employment sites and any new sites required. It states 'the overall design of the assessment framework is intended to allow balanced judgements between what would be a 'market – led' view and a 'planning / sustainable development – led' view. The principal difference between the two will be the weight that should be attached to each criterion' (ODPM, 2004: 55).

5.4 The main groups of appraisal criteria are concerned with:

i) Base Information: background data on sites;
ii) Quality: quality of sites and internal environment, existing property and wider environment as well as strategic access and market conditions;
iii) Deliverability and Sustainability: ownership and user constraints on development and redevelopment, site development constraints and three sustainability tests: accessibility to workforce and public transport, sequential test and brown field and green field;
iv) Policy: social, regeneration and other material policy considerations.

5.5 Under Stage Three, the Councils used two assessment frameworks:

- to assess five sites identified under Stage One and by a local employer for potential release and a further thirteen sites which landowners and their agents and the Councils identified as having potential for employment development; and
- to undertake a more detailed assessment of nine of the thirteen sites (which were identified as having most potential for sustainable development).

5.6 The first of the Stage Three assessments was concerned with four sets of criteria concerning: environmental constraints, economic and social well being, and the sequential and accessibility tests. These tests are described in Appendix 12.

5.7 The environmental constraints test considered criteria which would rule out or make remote the possibility of development in policy terms. Sites passing this test were assessed against their current or potential contribution to business, employment and housing.

5.8 Under the sequential test each site was placed in one of five areas:

- in the built – up area of Cambridge;
- on the periphery of the built up of Cambridge, on land released from the Green Belt;

- at the new settlement of Northstowe, linked to the guided bus way;
- on land within South Cambridgeshire's rural centres; and
- on land elsewhere in South Cambridgeshire.

5.9 Under the accessibility test six criteria were concerned with: proximity to the local workforce and population (and hence reducing the need to travel); and accessibility to the site by foot, cycle, bus and rail.

5.10 Under the second, more detailed, assessment the Councils applied four sets of criteria with thirteen indicators (described in Appendix 13) as follows:

i) Sustainable Development: to identify sites with potential for sustainable development, this test combined three indicators: the sequential and the accessibility scores from the initial assessment, previously developed test and density test;

ii) Employment Generating Development: this criterion identified which contribution the site could make to the vision of the Cambridge Sub Region as a centre of excellence and world leader in the field of higher education, research and the knowledge based economy;

iii) Future Market Requirements: this set of criteria assessed the potential types of development, investment demand for development and place within the wider supply of land;

iv) Environmental Capacity: this set of criteria considered three indicators: existing access and wider infrastructure for development and the potential impact of development on:
- transport infrastructure, and
- the amenity of adjacent land uses and local environment.

Confirm Existing Sites to be Retained or Released and Define Gaps in Portfolio

5.11 The guidance sets out a ten point process for the appraisal of sites in the existing portfolio. To avoid duplication of effort, the Councils applied a modified five task process:

i) Identify sites which should, without doubt, be safeguarded for future employment use;
ii) Undertake a site appraisal of wholly or partly undeveloped sites and confirm sites which should definitely remain in the portfolio and those which should be released;
iii) Quantify supply by market segment, sub area and likely delivery date;
iv) Compare the supply (identified under task three above) with the employment land requirements identified under Stage Two; and
v) Reconsider and confirm decisions to retain and release under task two above.

5.12 *Task One: Identify sites which should, without doubt, be safeguarded for future employment use.* Under Stage One, the Council devised appraisal criteria and a five point scoring system concerning: a market assessment of developer and business user demand; sustainable development and policy considerations (see Appendix 2).

5.13 The application of the criteria showed that:

i) 89 established employment sites in Cambridge and South Cambridgeshire should, without doubt, be safeguarded for future employment use (see Appendix 3);

ii) 3 sites totalling 4.81 ha were identified for change of use to housing through either Local Plan allocations or consents;

iii) 2 sites totalling 43.67 ha may be subject to redevelopment as part of the Cambridge East mixed use scheme;

iv) 2 undeveloped allocated employment sites totalling 4.59 ha (land adjacent to Wellbrook Court, Girton and Station Road, Gamlingay) should be the subject of a further appraisal under task two;

v) 2 sites currently occupied by firms totalling 1.5 ha (Jedburgh Court, Jedburgh Close, Buchan Street, Cambridge and Ditton Walk South, Cambridge) should be subject to appraisal under task five;

vi) the site occupied by Cambridge University Press should also be subject to appraisal under task five.

5.14 *Task Two: Undertake a site appraisal of wholly or partly undeveloped sites and confirm sites which should definitely remain in the portfolio and those which should be released.* The application of market and sustainable development assessment – shown in appendix 4 – confirmed that the sites adjacent to Wellbrook Court, Girton and Station Road, Gamlingay be subject to a further review under task five.

5.15 *Task Three: Quantify supply by market segment, sub area and likely delivery date.* The Council's analysis identified 176 ha of previously undeveloped consented and allocated employment land. Of this land:
- 139 ha were identified as being available for development; and
- 37 ha face some constraints to development.

EMPLOYMENT LAND SUPPLY JANUARY 2007

Market Area	Light Industry Warehouse	Offices	R&D	Unconstrained Land	Constrained Land	TOTAL Land
Cambridge	0	2.32	23.42	25.74	8	33.74
North and West	26.92	23.93	31.61	82.46	29.38	111.84
South and East	4.33	0	26.47	30.8	0	30.8
TOTAL	31.25	26.25	81.5	139	37.38	176.38

5.16 *Task Four: Compare the supply (identified under task three above) with the employment land requirements identified under Stage Two.* The comparison found that the current supply of 136 ha with potential for 648,257 sq m of development may be insufficient to accommodate the indicative target for net growth in jobs and provide for an adequate development pipeline for the efficient running of the development process.

EMPLOYMENT LAND REQUIREMENTS 2007 – 2026:

Options	Floorspace sq m (B1, B2, B8)	Land (ha)
Experian BSL ‘EG 21’ 2003 19,000 jobs for B uses	526,115 sq m	144.8
Experian BSL ‘EG 21 2004 22,800 jobs for B uses	569,744 sq m	164.5

5.17 In Stage Two, the case was established for the identification of additional employment sites under Stage Three in order to ensure the availability of a sufficient quantity, quality and choice of sites throughout and beyond the end of the plan period and that development beyond 2019 would be zero carbon and accessible by sustainable modes of transport. The issues to be addressed concern:

Specific provision for high technology clusters: the break down of the supply of previously undeveloped consented and allocated land identifies an impending gap in the North Cambridge: the market sub area which serves the ICT and computing services cluster. On the other hand there is a strong supply of land serving market segments in three property market sub areas:

- secure sites for bio technology R&D in south and east Cambridge (81,600 sq m);
- Addenbrookes for bio medical/ technology research (115,000 sq m); and
- West of Cambridge for industry/ University based research (60,300 sq m).

Specific provision for essential services: the need to meet reported requirements for a bus depot to support the planned growth in bus services and a new Council depot to support better environmental services standards for a growing population;

Specific provision for offices: the need to add to the supply of prime offices in Cambridge (as there are only limited opportunities to add to the existing stock);

Changing circumstances: the need to put in place contingency options to anticipate the failure to bring forward land for development during the plan period;

Choice: the need to add to the development pipeline in order to maintain the continuity of choice (as land is taken up through the plan);

Sustainability, planning for the low carbon future: the need to identify employment sites which could:
- support investment in on and off site renewable energy generation;
- make use of or support investment in sustainable modes of transport, notably existing and potential railway stations and high quality bus services; and
- provide for demand for the latter part of the plan period and beyond.

5.18 *Task Five: Reconsider and confirm decisions to retain and release under task two above.* Under task two, the Council identified five sites for further review under task five.

5.19 The Councils’ reconsideration of the five sites for retention or release concerned four tests with eighteen indicators (shown in Appendix 11). The economic and social well being test was concerned with the benefits of safeguarding existing employment uses and releasing sites for housing. The assessments concluded (see Appendix 12) with the following options:

i) Jedburgh Court, Buchan Street, Cambridge: release the site as it supports a small number of firms. These firms could be accommodated within the City Council's stock of small units and the site could be developed with the adjoining underused car park for up to twenty homes.

ii) Ditton Walk South, Cambridge: release the site as redevelopment of the existing buildings is constrained by the fragmented land ownership and the hope value created by the granting of planning permission for housing on part of the area.

iii) Land Adjacent Wellbrook Court, Girton: release the site for housing as there are alternative office locations with better access, for example, Arbury Park which is close to the proposed guided bus way.

iv) Station Road, Gamlingay: release the site due to the failure of the market to bring the land forward since its designation in 1993 and the lack of any policy rationale to justify its continued retention.

v) Cambridge University Press: safeguard the site as it accommodates a major employer in modern premises in a location which is accessible by sustainable modes of transport.

Identify Additional Sites to be Brought Forward

5.20 The guidance refers to the practice of 'frontloading' in policy development, where developers and landowners are invited to bring forward specific site proposals.

5.21 In Planning Policy Statement 12, the Government advises 'local planning authorities should front load the preparation of development plan documents by facilitating early involvement and securing inputs from the community and all stakeholders. The preparation process should include consideration of all the alternative options derived from the development of the evidence base, the authority's awareness of local issues, the views of stakeholders and community involvement' (ODPM, 2004: 29). The Government adds, 'front loading is particularly important when the development plan document is dealing with site allocations. All those who wish land to be allocated for development should ensure that their sites are brought forward early in the process so that they can be considered by the local planning authority and subjected to sustainability appraisal' (ODPM, 2004:29).

5.22 To involve stakeholders and build a consensus concerning the review, the Council held a seminar in May 2007. At the seminar, 25 representatives of landowners, developers and businesses were briefed on:

- the policy framework for employment land planning in the Cambridge sub region;
- the provisional analyses of development trends in the period 1998 – 2006 and the supply of employment land; and
- a market perspective which identified property sub markets for R&D and offices, noted the under supply of land and consents for light industry and offices and concluded with questions concerning selective management and car parking policies on the Cambridge office market.

5.23 The stakeholders were then invited to debate issues concerning some of the key employment land planning questions for Cambridge and South Cambridgeshire:

a) What are the cases for either retaining Cambridge's historical industrial areas or changing their use to housing, subject to the relocation of firms and jobs to the City fringe?

The stakeholders established a consensus that Cambridge's industrial areas should be safeguarded to keep businesses that serve the City within the City and maintain a mix of job opportunities.

b) What are the cases for reviewing Cambridge's older offices and intensifying development within Cambridge's newer employment areas?

The stakeholders established there is a shortage of new office space in prime City centre locations but adopted alternative standpoints: the market case for laxer car parking standards to encourage development and the policy case for reducing car usage for sustainable development.

c) What needs to be done to ensure housing and employment sites are built together to deliver balanced and comprehensive development in Northstowe and Cambridge East?

The stakeholders agreed that to make Northstowe a place where people want to live and work will require up front investment to bring forward housing and employment together with sustainable transport links. The stakeholders proposed a spectrum of policy prescriptions:
- no interventions as these increase investors' risks and costs;
- an integrated approach to attracting inward investment to Northstowe, developing a skilled workforce and linking together the provision of employment with housing and sustainable transport.

d) What needs to be done to minimise the carbon footprint of new employment developments for the 21st Century's low carbon economy?

The stakeholders reached a consensus on four points:
- refurbished buildings could never be carbon neutral
- the redevelopment of employment buildings in the most sustainable locations is not happening;
- to reduce car based travel there has to be a complementary investment in low cost public transport services;
- low carbon development requires legislation and informed clients.

5.24 The report of proceedings is attached as Appendix 15.

5.25 Following the seminar, the Council invited landowners and agents to put forward sites to be considered for future employment development. Interested parties were asked to provide a site plan, information on their aspirations for the relevant site(s) and details of any constraints on development. In addition to the sites put forward, the Council identified a number of additional sites which were considered to be appropriate for assessment. In total thirteen sites were identified.

5.26 In accordance with a key Government requirement to promote a sustainable pattern of development, the Council subjected each of the sites to four tests concerned with: environmental constraints; economic and social well being; sequential development and accessibility (Appendix 11).

5.27 The assessment scores for sites nominated for employment development are set out in Appendix 12. Of the thirteen sites, four sites were found to have environmental constraints. Of these sites two are in the Green Belt and a third is within a conservation area. At the fourth site, the Waste Water Treatment Works, development faces policy and financial constraints. Release of the site for development would require a suitable relocation site to be identified in a future Waste and Minerals LDF and it is understood the costs of a new treatment works would exceed the development value of the existing site.

5.28 The remaining eight sites were brought forward for a second assessment (see Appendix 13), under which the Councils produced profiles of:
- the potential of the sites for sustainable development, contribution to the employment land supply, investment and environmental impact (Appendix 14); and
- the constraints to and development potential of the sites (Appendix 15).

5.29 To identify options for public consultation, the Councils matched the highest scoring sites nominated for employment development (shown on Map 10) against the employment land supply issues identified in Stage Two:

Specific provision for high technology clusters:

- 100,000 sq m on 7 ha of safeguarded land identified at Addenbrookes for clinical D1 and B1(b), subject to review in 2016 (of which 3.5 ha with 21,000 sq m of potential B1 b development was identified as constrained land in the current supply, see Appendix 10);

- 25,000 sq m of potential B1 (b) development identified through the intensification of existing employment areas at Cambridge Science Park and St John's, Cowley Road;

Specific provision for essential services:

- 6.64 ha comprising 1.96 ha at the existing Park and Ride, Cowley Road and the adjoining 4.68 ha at the Golf Driving Range with potential to meet requirements for a bus depot (to support planned growth in bus services) and a Council depot (to support better environmental services standards for a growing population).

Gaps in property sub markets:

- 10,700 sq m of potential B1 (a) development in a mixed use scheme on 1.45 ha, where release for development is subject to a release from rail sidings opposite Cambridge Station;

- 6.71 ha for a new Gateway Station, car parking and up to 25,000 sq m of B1 (a) development, subject to master plan;

- Land at Coldhams Lane, a former tip with up to 19 m of land fill, this site may have potential for employment development in the long term and therefore one option is to protect it for this use.

Development pipeline: the above sites could be brought forward as follows:

- 2008 onwards: existing Park and Ride site (subject to the opening of new Park and Ride site), Golf Driving Range (subject to vacant possession) and St John's, Cowley Road (subject to master planning and traffic and environmental impact studies);

- 2016 onwards: Addenbrookes, subject to review;

- dates to be determined: Cambridge Science Park (subject to vacant possession), Cambridge Station sidings and Chesterton Sidings (subject to Rail Utilisation Study) and Coldhams Lane (subject to feasibility studies).

Sustainability, planning for the low carbon future:

- all of the above sites are located close to either a) railway stations and high quality bus routes or b) high quality bus routes;

- consideration is given to scale of the employment land allocation at Cambridge East as this allocation could accommodate zero carbon employment development after 2019 through investment in on and off site renewable energy generation and access to sustainable modes of transport notably walking, cycling and high quality bus services;

- no additional sites are nominated in the north and west and south and east of Cambridge property sub market areas as there is already adequate supply and there are limited opportunities for identifying sites capable of supporting sustainable development.

Draft Action Plan

5.30 In the light of the findings and options arising from this review, actions for the Councils' consideration include:

i) Promoting Sustainable Development: It is proposed that the Councils make any new allocations in accordance with:

a) Draft RSS Policy CSR 1 which requires that LDDs to provide for development in the sub region focused on making the most of the development potential of land sequentially focused on Cambridge.

b) Draft RSS Policy E2 which requires for LDDs to identify sites at locations which:
- minimise commuting and maximise potential use of public transport (and overall reducing the need to travel by car); and

- promote more sustainable communities by achieving a closer relationship between homes and jobs.

ii) Safeguarding Employment Land: It is proposed that the Councils review their employment land policies in accordance with:

a) Draft RSS Policy E2 which requires that LDDs identify, allocate and safeguard and/ or protect employment land (from pressures for higher value uses);

b) a basic policy stance of the Draft RSS and RES to ensure development results in a better not worse alignment between homes and jobs (by linking the development of employment land allocations in mixed uses schemes with housing completions and hence securing balanced, comprehensive and sustainable development).

iii) Regionally Strategic Employment Locations: Draft RSS Policy E 3 requires that LDDs identify readily serviceable regionally strategic employment sites at a number of locations including the Cambridge sub region 'to secure its full potential as a centre for world class research and development.'

It is proposed that the Councils through LDDs:

a) confirm four strategic employment locations (which were identified in the Structure Plan Policy P2/3): Addenbrooke's Hospital, University North West of Cambridge site, Northstowe and Cambridge East (where consideration should be given to designating this allocation for employment land allocation for (zero carbon) development both towards the end of the plan period and beyond);

b) identify a further strategic employment location at North Cambridge covering Cambridge Science Park and employment land at Cowley Road and Cowley Park and Chesterton Sidings; and

c) prepare a joint Area Action Plan for North Cambridge to set a vision and set of development principles, the broad policy context and more detailed guidance for development.

6 MONITORING AND POLICY REVIEW

Introduction

6.1 The Government's guidance notes that monitoring involves both keeping track of the outcomes of policy and development control decisions and a broader system of watching and analysing local demographic and economic conditions. There is now a formal requirement for LDF authorities to publish an Annual Monitoring Report as 'the main mechanism for reviewing the relevance of local development documents and identifying any changes necessary' (ODPM, 2004: 74).

Local Development Framework Core Output and National Indicators

6.2 To inform the preparation of the Annual Monitoring Report, the Government has published a set of 'Local Development Frameworks Core Output Indicators.' For business development the indicators are:

1a) Amount of floorspace developed for employment by type.

Employment type is defined by Use Classes Order B1 a, b, c, B2 and B8. Amounts should be defined in terms of completed gross internal floorspace (sq m).

Gross internal floorspace is the entire area inside the external walls of a building and includes corridors, lifts, plant rooms, service accommodation e.g. toilets but excludes internal walls. The difference between gross external area and gross internal floorspace is typically between 2.5 and 5 %.

1b) Amount of floorspace developed for employment by type, in employment or regeneration areas.

Measuring the amount of completed gross internal floorspace (sq m) for B1 a, b, c, B2 and B8, within employment or regeneration areas defined and allocated in the local development framework.

1c) Amount of floorspace by employment type, which is on previously developed land.

The amount and percentage of completed gross internal floorspace (sq m) of B1 a, b, c and B2 and B8 upon previously developed land (as defined in Annex C of PPG3 (March 2000).

1 d) Employment land available by type.

Land (in hectares) which is available for employment use, being defined as i) sites defined and allocated in the local development framework, and ii) sites for which planning permission has been granted for B1 a, b, c, B2 and B8.

1 e) Loses of employment land in i) employment / regeneration areas and ii) local authority area.

The amount of land (in hectares) which was available for employment (B1 a, b, c, B2 and B8), in the previous monitoring year (1 d) but has been lost to completed non – employment uses in the current monitoring year.

1 f) Amount of employment land lost to residential development.

Where land is lost to development identified in 1 e, the amount which lost to completed residential development (C3).

6.3 In a new performance framework for local authorities and local authority partnerships, the Government has produced a single set of 198 national indicators. Of these indicators two are of relevance to employment land planning:

N170 Previously developed land that has been vacant or derelict for more than five years; and

N176 Working age people with access to employment by public transport and other specified modes.

Business and other Employment Monitoring

6.4 Cambridgeshire County Council collects and presents monitoring data on behalf of five District Councils including Cambridge City and South Cambridgeshire. The data are concerned with:

i) the existing stock and its floorspace (making use of Valuation Office data);

ii) land which is available for employment (B1 a, b, c, B2 and B8) as sites allocated for employment and sites for which planning permission has been granted;

iii) B1 a, b, c, B2 and B8 development noting gains, losses, extensions and redevelopment and changes of use between B uses;

iv) Travel plans and parking provision for new development and public transport accessibility to employment areas.

6.5 For Cambridge City, data are collected for D1 (education uses) and related sui generis research institutes and other employment generating uses.

6.6 The County Council's monitoring data can be seen via the County Council web site. These data present the complete set of allocations and permissions. This review focuses on data on developable land within larger sites.

Policy Review

6.7 The Government's guidance notes that LDF authorities should review and present a full update of its employment land review whenever a formal review of the relevant part of the LDF is undertaken.

6.8 The Government's 'Review of Sub National Economic Development and Regeneration,' announced in July 2007 gave Regional Development Agencies a new strategic role to develop a single strategy coordinating jobs, economic growth, housing, planning and environmental objectives. As part of the preparations to start the plan process in 2010, EEDA has commissioned Oxford Economics to produce employment forecasts for the period to 2031 and guidance for future employment land reviews.

APPENDIX 1

MARKET RESPONSES TO EMPLOYMENT LAND ALLOCATIONS

Market Area	Use	Area (ha)	Development (ha)
Cambridge			
Garlic Row	B1 c	0.14	Developed 0.14
Coldhams Common Industrial Area	B1 c/B2	0.35	Developed 0.35
Gas Works, Cheddar Lane	B1 c/B8	1.52	Lost to retail
Peverel Drive, Barnwell Drive	B1 c	0.89	Lost to housing allocation
Blue Circle Site, Norman Way, Coldhams Lane	B2/8, D2e	11	Developed 3.24 Lost to leisure 7.76
St John’s, Cowley Road (two sites)	B1 b	0.8	Developed 0.32 Available 0.48
Cambridge Business Park, Cowley Park	B1a/b	6.07	Developed 6.07
University West of Cambridge Site, High Cross Research Park	B1 b Sui generis research institutions	11.94	Developed 3.4 Available 8.54
Cambridge Sub Total		**32.71**	
South Cambridgeshire: North & West			
Station Road, Gamlingay (SP/11 a)	B1/ B2	4	Available
Premier Brands, Histon	B1/ B2	2.2	Developed 0.43 Available 1.77
Cambridge Research Park, Landbeach (SP/10 a)	B1	19.46	Developed 8.36 Lost to hotel consent 1.4 Available 9.7
Hattons Road, Longstanton	B1 b	4.81	Subject to by pass
Saxon Way Industrial Estate extn, Melbourn	B1	1.2	Lost to housing
Norman Way extension, Over, (SP/ 11 b)	B1/ B2	2.4	Developed 0.7 Available 1.7
Ermine Street (west), Papworth Everard	B1	4	Lost to housing
Papworth Business Park, Ermine Street (east), Papworth Everard SP/11 c	B1/ B2	10.69	Developed 7.03 Available 3.66
Buckingway Business Park extension, Swavesey	B1	9.68	Developed 6.24 Available 3.44
South Cambridgeshire East & West			
Woburn Place (west of), Heathfield	B1/ B2	1.4	Lost to housing
Eastern Counties Leather, (west of), Pampisford (SP/10 b)	B1	1.86	Developed 1.0 Available 0.86
South Cambridgeshire Sub Total		**61.7**	
TOTAL		**94.41**	

APPENDIX 2

Established Employment Areas: Criteria and Scoring Regime for Safeguarding

i) Market Assessment: Developer and Business Demand

a) Is there evidence of developer demand – defined as development activity on neighbouring sites within the last five years – to suggest that B1, 2 and 8 development would be viable during the plan period?

Within and in adjoining employment areas:	Score
Extensive development activity	1
Some development activity	2
Planned development likely to go ahead	3
Evidence of marketing and planning discussions	4
No development activity	5

b) Is there evidence of business user demand – defined as B1, 2 and 8 activities on neighbouring sites within the rest of the established employment area and adjacent established employment areas?

Within and in adjoining employment areas:	Score
High levels of business occupation	1
Extensive business occupation with some vacant sites and premises	2
Business user demand emerging over long development period	3
Business user demand limited to local firms	4
No evidence of business user demand	5

ii) Sustainable Development and Planning Policy Assessment

a) Sequential Development Test: development located sequentially within the built up area of Cambridge, on the periphery of the built up area of Cambridge, at the new settlement of Northstowe, linked to the guided bus, and on land within or on the peripheries of the sub region’s market towns and within key centres.

	Score
Cambridge and Cambridge Periphery	1
Northstowe, linked to the guided bus	2
Rural Centre	3
Minor Rural Centre	4
Elsewhere	5

b) Sustainable Access Test: access by sustainable modes of transport: foot, cycle, bus and train.

	Score
Cambridge	1
Cambridge Periphery	2
Guided bus route, quality bus route and train station	3
Bus and train connections	4
Limited public transport	5

c) Strategic and Local Planning Tests: safeguard existing employment and safeguard proposed employment development which support, and have the potential to support, the Cambridge area's position as a world leader in higher education and research and knowledge based industries, other small scale industries and the provision of essential services.

	Score
Safeguard existing employment	1
Safeguard potential employment	2
	3
Potential for alternative uses	4
Existing allocation for housing	5

APPENDIX 3

Stage One Site Appraisal of Established Employment Areas for Safeguarding

Estates	Developer Demand	Business Demand	Sequential Test	Sustain. Access	Strategic Local Planning
i) North Cambridge					
Chesterton Mills, Frenchs Road;	5	1	1	1	1
Kidmans and Hibbits, Victoria Road;	5	1	1	1	1
Trinity Hall Farm Industrial Estate;	3	1	1	1	1
Robert Davies Court;	5	1	1	1	1
Nuffield Road Industrial Area;	5	2	1	1	1
Cambridge Commercial Park;	5	1	1	1	1
Orwell House;	5	1	1	1	1
Kilmaine Close;	1	2	1	1	1
Jedburgh Court, Buchan Street;	**5**	**1**	**1**	**1**	**4**
St John's Innovation;	5	1	1	1	1
Jeffries Building;	5	1	1	1	1
Cambridge Business Park;	5	1	1	1	1
Vitrium House.	5	2	1	1	1
ii) City Railside					
Cheddars Lane Ent Plots;	5	1	1	1	1
Mercer's Row, Swann's Road Industrial Estate;	2	1	1	1	1
Barnwell Junction;	5	1	1	1	1
Ditton Walk South;	**5**	**2**	**1**	**1**	**4**
Beadle Industrial Estate;	5	2	1	1	1
Ditton Walk North;	5	2	1	1	1
Ronald Rolph Court;	5	1	1	1	1
Coldham's Lane;	5	1	1	1	1
Gwydir Street Enterprise Centre;	5	1	1	1	1
Michael Young Centre,		1	1	1	1
Purbeck Road;	5	1	1	1	1
Cambridge University Press;	5	1	1	1	1
Clifton (Road) Industrial Estate;	2	1	1	1	1
Henley Road;	5	1	1	1	1
Signet Court, Swann's Road;	5	1	1	1	1

Estates	**Developer Demand**	**Business Demand**	**Sequential Test**	**Sustain. Access**	**Strategic Local Planning**
Harvest Road, Eastern Gateway;	4	3	1	1	2
Mackay's, East Road; Newmarket Road/	4	1	1	1	1
Coldhams Lane; Cromwell Road;	**3**	**1**	**1**	**1**	**5**
iii) Cambridge East					
Cambridge Technopark, Newmarket Road;	2	2	1	1	1
Marshall of Cambridge;	5	1	1	1	1
Barnwell Drive Business Park;	5	1	1	1	1
College Business Park;	5	1	1	1	1
Coldham's Business Park, Norman Way;	5	1	1	1	1
The Quorum, Barnwell Road;	5	1	1	1	1
Cambridge Water, Fulbourn Road;	5	1	1	1	2
Peterhouse Technology Park; Fulbourn Road;	5	1	1	1	2
The Paddocks, Cherry Hinton Road;	**5**	**1**	**1**	**1**	**5**
Neath Farm Business Park.	**5**	**2**	**1**	**1**	**5**
iv) West and Central Cambridge and Addenbrookes					
High Cross, Madingley Road;	5	1	1	1	1
University West of Cambridge site;	5	3	1	1	1/2
Forvie, Red Cross Lane;	5	1	1	1	1
University North West of Cambridge;	5	3	1	1	2
Addenbrookes, 2020;	4	3	1	1	2
v) North and West of Cambridge					
Trafalgar Way, Bar Hill;	5	1	4	4	1
Viking Way, Bar Hill;	5	1	4	4	1
Bourn Airfield, Bourn;	5	1	5	5	1
Broad Lane, Cottenham;	5	2	4	4	1
Brookfields Business Estate, Cottenham;	5	1	4	2	1
Dry Drayton Industrial Estate, Dry Drayton;	5	1	5	4	1
Green End, Gamlingay;	5	1	4	4	1

Estates	Developer Demand	Business Demand	Sequential Test	Sustain. Access	Strategic Local Planning
Button End Industrial Estate, Harston;	5	1	5	4	1
Premier Brands, Chivers Way, Histon;	5	2	3	3	1
Duffields Site, Landbeach;	2	2	5	4	1
Saxon Way, Melbourn;	5	2	4	4	1
Crane Industrial Estate, Milton;	5	1	1	2	1
Winship Estate, Milton;	5	1	1	2	1
Norman Way, Over;	5	1	5	5	1
Denny End, Waterbeach;	5	1	4	4	1
Oakington Business Park, Oakington;	5	1	2	3	1
Papworth Business Park, Papworth Everard;	2	2	4	4	1/2
Buckingway Business Park, Swavesey;	2	2	5	5	1/2
Cambridge Northern Fringe (Arbury Park);	5	3	1	2	2
Northstowe;	4	3	2	2	2
Cambridge Southern Fringe;	4	3	1	3	2
Cambridge East;	4	3	1	2	2
Station Road, Gamlingay;	**5**	**5**	**4**	**5**	**4**
Wellbrook Court, Girton;	**5**	**1**	**1**	**2**	**4**
Horizon Park, Comberton;	5	1	5	4	1
Cambourne Business Park, Cambourne;	2	3	3	4	1/2
Vision Park, Histon;	5	1	3	2	1
Former Bayer Crop Science, Hauxton;	4	3	5	4	2
Cambridge Science Park;	2	1	1	2	1/2
St John’s, Cowley Road;	5	1	1	2	1
Harston Mill, Harston;	5	1	5	4	1
Cambridge Research Park, Landbeach;	2	3	5	5	1/2
Melbourn Science Park Melbourn;	5	1	4	4	1
PA Technology, Melbourn;	5	1	4	4	1/2
Hattons Road, Longstanton;	5	3	2	3	1
Cemex, Barrington;	5	1	5	5	1

Estates	Developer Demand	Business Demand	Sequential Test	Sustain Access	Strategic Local Planning
iii) South and East of Cambridge					
Fielding Industrial Estate, Fulbourn;	5	1	3	4	1
Grip Industrial Estate, Linton;	2	1	4	4	1
Cambridge Road, Linton;	5	1	4	4	1
Langford Arch and London Road Industrial Estates Pampisford;	2	1	3	4	1
Dales Manor Business Park, Sawston;	2	1	3	4	1/2
Marshall of Cambridge (North Works);	5	1	1	2	1
CIBA, Duxford;	5	1	5	5	1
Daleshead Foods Limited, Linton;	5	1	4	5	1
Spicers, Sawston;	5	1	3	4	1
Capital Park, Fulbourn;	2	2	3	5	1
Babraham Institute, Babraham Hall, Babraham;	2	1	5	4	1
Granta Park, Great Abington;	5	1	5	4	1
Genome Campus, Hinxton Hall, Hinxton;	2	1	5	4	1

APPENDIX 4

Wholly or Partly Undeveloped Allocated Employment Sites: Criteria and Scoring Regime for Release as Unsuitable or Unlikely to be Brought Forward

i) Market Assessment: Developer and Business Demand

a) Has the site been formally identified for employment for at least ten years?

b) Has there been any development activity within the last five years?

ii) Sustainable Development and Planning Policy Assessment

a) Would the site be allocated today for employment development measured against present (and expected future) sustainable development and policy tests?

- Previously Developed Land. Score: 1 – 5 see appendix 3 above;
- Sustainable Access. Score: 1 – 5 see appendix 3 above; and
- Strategic and Local Planning Policies see appendix 5.

b) Are there any policy considerations such as emerging strategic objectives which should override any decision to release the site?

APPENDIX 5

Stage One Appraisal of Wholly or Partly Undeveloped Allocated Employment Sites for Release as Unsuitable or Unlikely to be Brought Forward

Station Road, Gamlingay

When Allocated?	Local Plan 1993
Development Activity?	None
Sequential Test and Sustainable Access	Greenfield site at the bottom of the sequential hierarchy with poor public transport services
Would Site be Allocated Today?	Not in the light of market failure and the above policy considerations
Strategic/ Local Planning?	No

Adjacent to Wellbrook Court, Girton

When Allocated?	
Development Activity?	None on site, office park to the north and new housing development to the south
Sequential Test and Sustainable access	Greenfield site within the Cambridge Urban Area with quality (every 20 minutes) bus service
Would Site be Allocated Today?	Not in the light of market blight and the supply of better located employment land
Strategic/ Local Planning?	Potential site for sustainable residential development

APPENDIX 6

EMPLOYMENT AREAS IN CAMBRIDGE AND SOUTH CAMBRIDGESHIRE

North Cambridge

Type of Site	Estates	ha
Old General Industrial and Business Areas	Chesterton Mills, Frenchs Road (35/36);	0.62
	Kidmans and Hibbits, Victoria Road (37);	0.38
	Trinity Hall Farm Industrial Estate (1);	1.27
	Robert Davies Court (2);	0.32
	Nuffield Road Industrial Area (3);	4.83
	Cambridge Commercial Park (5);	7.87
	Orwell House, Orwell Furlong (6);	1.0
	Kilmaine Close (15);	2.67
	Jedburgh Court, Buchan Street (0);	0.09
Incubator/ SME Cluster site	St John's Innovation Centre (8);	1.73
	The Jeffries Building, Cowley Road (7).	0.76
Established Office Location	Cambridge Business Park (4).	8.34
	Vitrium House (16)	0.59

City Railside

Type of Site	**Estates**	**ha**
Old General Industrial and Business Areas	Cheddars Lane Enterprise Plots & S&S Motors (10, 11);	1.93
	Mercer's Row, Swann's Road Industrial Estate (13);	6.23
	Barnwell Junction, Swann's Road (14);	0.47
	Ditton Walk South (17);	1.41
	Ditton Walk North and Beadle Industrial Estate(18);	1.91
	Ditton Walk North, Oil Depot and NHS Equipment (19);	1.11
	Ronald Rolph Court, Wadloes Road (20);	0.55
	Coldham's Lane North of Railway (24);	2.2
	Coldham's Lane South of Railway (25);	1.22
	Gwydir Street Enterprise Centre (42);	0.27
	Michael Young Centre, Purbeck Road (39);	1.26
	Cambridge University Press (49) (ex rail side)	11.06
New Gen. Industrial and Business Area	Clifton Industrial Estate (29)	7.55
Warehouse and Distribution Park	Henley Road (26)	1.61
Established Office Location	Signet Court, Swanns Road (12)	0.68
Proposed Mixed Use	Harvest Road, Eastern Gateway (40);	1.53
	Mackay's, East Road (41);	0.48
	Intercell House, Coldhams Lane, Newmarket Road (27);	1.12
Housing allocation	Cromwell Road (28).	1.14

East Cambridge

Type of Site	Estates	ha
Old General Industrial and Business Area	Cambridge Technopark, Newmarket Road (21); Marshall of Cambridge (Hangers) (50); Barnwell Drive Business Park (22); 515 Coldham's Lane (33); Coldham's Lane, Rosemary Lane (34)	1.04 26.57 0.98 0.85 3.75
New Gen. Industrial and Business Area	College Business Park, Coldham's Lane (31)	1.23
Warehouse and Distribution Park	Coldhams Business Park, Norman Way (38)	2.81
Established Office Location	The Quorum, Barnwell Road (23); Cambridge Water, 94 – 96 Fulbourn Road (44)	2.07 0.72
Research and Tech/ Science Park	Peterhouse Technology Park, Fulbourn Road (43)	4.58
Housing allocations	The Paddocks, Cherry Hinton Road (30); Neath Farm Business Park, Church End (32)	2.88 0.79

West and Central Cambridge and Addenbrookes

Type of Site	Estates	ha
Research and Technology/ Science Parks	High Cross, Madingley Road (47) University West of Cambridge site (46); Forvie, Red Cross Lane (45).	10.75 15.97 2.43
Proposed Research and Technology/ Science Parks	University North West of Cambridge (48); Addenbrookes 2020 (51).	10.65 19.4

South Cambridgeshire: North and West of Cambridge

Types of Site	Estates	ha
Old General Industrial and Business Areas	Trafalgar Way, Bar Hill (17); Viking Way, Bar Hill (18); Bourn Airfield, St Neots Road, Bourn (20); Broad Lane Industrial Estate, Cottenham (24); Brookfields Business Estate, Cottenham (25); Dry Drayton Industrial Estate, Dry Drayton (26); Green End Industrial Estate, Gamlingay (30); Button End Industrial Estate, Harston (33); Premier Brands, Chivers Way, Histon (37); Duffields Site, Landbeach (48);	11.54 4.58 13.09 2.32 2.7 0.83 3.74 1.64 7.02 8.45

Type of Site	Estates	ha
	Saxon Way, Melbourn (41); Crane Industrial Estate, Milton (42); Winship Estate, Milton (42); Norman Way, Over (10); Denny End, Waterbeach (47).	6.5 4.43 2.96 4.36 8.34
New General Industrial and Business Areas	Oakington Business Park, Oakington (43); Papworth Business Park, Papworth Everard (11); Buckingway Business Park, Swavesey (46).	1.28 11.27 14.93
Proposed New General Industrial and Business Areas	Cambridge Northern Fringe, Arbury Park (5); Northstowe (1); Cambridge Southern Fringe (4); Cambridge East (2). Station Road, Gamlingay (9).	3.01 20 tbc 20/25 4.12
Office Locations	Wellbrook Court, Girton (31); Horizon Park, Comberton (23);	0.96 1.1
High Quality Business Park	Cambourne Business Park, Cambourne (21); Vision Park, Chivers Way, Histon (36); Former Bayer Crop Science, Hauxton (proposed) (8).	23.47 6.5 2
Research and Technology/ Science Park	Cambridge Science Park (13); St John's, Cowley Road (14); Harston Mill, Harston (34); Cambridge Research Park, Landbeach (38); Melbourn Science Park, Melbourn (40); PA Technology, Melbourn (41); Hattons Road, Longstanton (Proposed) (6).	61.2 6 4.64 29.05 6.58 11.46 4.81
Specialist Industrial Site	Cemex, Barrington (19)	159

South Cambridgeshire: South and East of Cambridge

Type of Site	Estates	ha
Old General Industrial/ Business Area	Fielding Industrial Estate, Fulbourn (29); Grip Industrial Estates, Linton (39); Cambridge Road, Linton (50); Langford Arch and London Road Industrial Estates, Pampisford (7); Dales Manor Business Park, Sawston (44); Marshall of Cambridge (North Works) (15); CIBA, Ickleton Road, Duxford (27); Daleshead Foods Limited, Linton (49); Spicers, Sawston (45)	2.26 2.89 4.02 7.45 16.48 17.1 24.37 3.39 16.81

Type of Site	Estates	Ha
High Quality Business Parks	Capital Park, Fulbourn (28).	16.13
Research and Technology/ Science Parks	Babraham Institute, Babraham Hall, Babraham (16); Granta Park, Great Abington (32); Genome Campus, Hinxton Hall, Hinxton (35).	15.97 41.53 50.79

APPENDIX 7

LABOUR SUPPLY AND DEMAND: CENSUS 1991 and 2001

This appendix provides some historical context to forecast labour demand and supply by looking at changes to numbers of employed residents and workplace populations between 1991 and 2001. Unfortunately the comparisons are not straight forward:

In 1991 the Census covered workers aged 75 to 79; the 2001 Census discounted anyone working aged 75 and over. However, national surveys indicate that only around 1% of women and 3% of men in the age group 75 to 79 work.

The 2001 Census is termed 'One number'; this means the results have been grossed up to approximate the total population. In an area such as Cambridge and South Cambridgeshire this means that an upward adjustment of around 3% has been made.

In 1991 not only was there no 'grossing up' of respondents to give a total population overview, but workplace information was only coded for 10% of respondents. It is therefore an estimated statistic. It is also understood that no records were modified to fill in 'missing' responses – such as, for example, omitting the name or place of employment.

The best estimate of the 'undercount' in Cambridge and South Cambridgeshire at 1991, as compared to 2001, is around 3%. This means it is sensible to adjust 1991 counts of residents and workplace populations upwards by 3%

Census	Cambridge	South Cambs	Total
1991			
Residents employed (x 1.03)	43,530	62,450	105,980
Workplace population (x1.03)	72,950	48,380	121,330
Net Commuting	29,420 in	14,070 out	15,350 in
2001			
Residents employed	49,240	69,160	118,400
Workplace population	78,700	64,100	142,800
Net Commuting	29,460 in	5,060 out	24,400 in
Changes 1991 - 2001			
Residents employed	5,710	6,710	12,420
Workplace population	5,750	15,720	21,470
Net change in net commuting	40 more in	9,010 less out	9,050 more in

APPENDIX 8

MONITORING CHANGES IN LABOUR SUPPLY AND DEMAND SINCE 2001

The only sources of data to monitor changes in labour supply and demand arise from sample surveys: from the Labour Force Survey (LFS) of people and the Annual Business Inquiry (ABI) of jobs. The new Annual Population Survey, which draws on the LFS, is now publishing data on workplace populations alongside employed residents, enabling some monitoring of the residents to workplace jobs balance.

Annual Business Inquiry

The ABI is a sample survey of businesses and measures numbers of employees. It is the platform on which Cambridge Econometrics and Experian BSL build their employment estimates and forecasts. The survey adopts a complicated methodology for producing ‘grossed up’ employee estimates for districts. This methodology involves modelling ‘industry domains’ at a regional level and breaking these down to both regions and individual industry sectors. As a sample survey the employment estimates are subject to sampling variation – typically the ‘true’ employment total for each district is likely to lie between + or – 6% of the published estimate. To give an example, the 2004 estimate of employee jobs in Cambridge City is around 79,000. However there is a 95% chance that the ‘true’ number of employee jobs lies between 74,000 and 84,000.

It is important to notes that the ABI does not count members of the armed forces and self-employed people. The only information on self employment at the district level comes from the LFS/APS and, due to a small sample, is not sufficiently robust to enable year on year trends to be monitored.

The ABI does count employees at their pay-points – which are not necessarily the places where people work. The following examples help explain the problem.

There has been a marked trend by a wide range of businesses to employ temporary and agency staff. This is because some businesses have highly seasonal workloads and others do not wish to commit to employing people on a permanent basis. As a result it is understood that there are now several thousand people working in employment agencies which have offices in Cambridge.

People who are employed through agencies will be counted by the ABI at the agency’s office and not at the places where they are working. They will also be allocated to the ‘business services’ sector whilst in practice they will be working in catering, transport, manufacturing, agriculture, wholesaling and a wide range of offices in the public and private sectors.

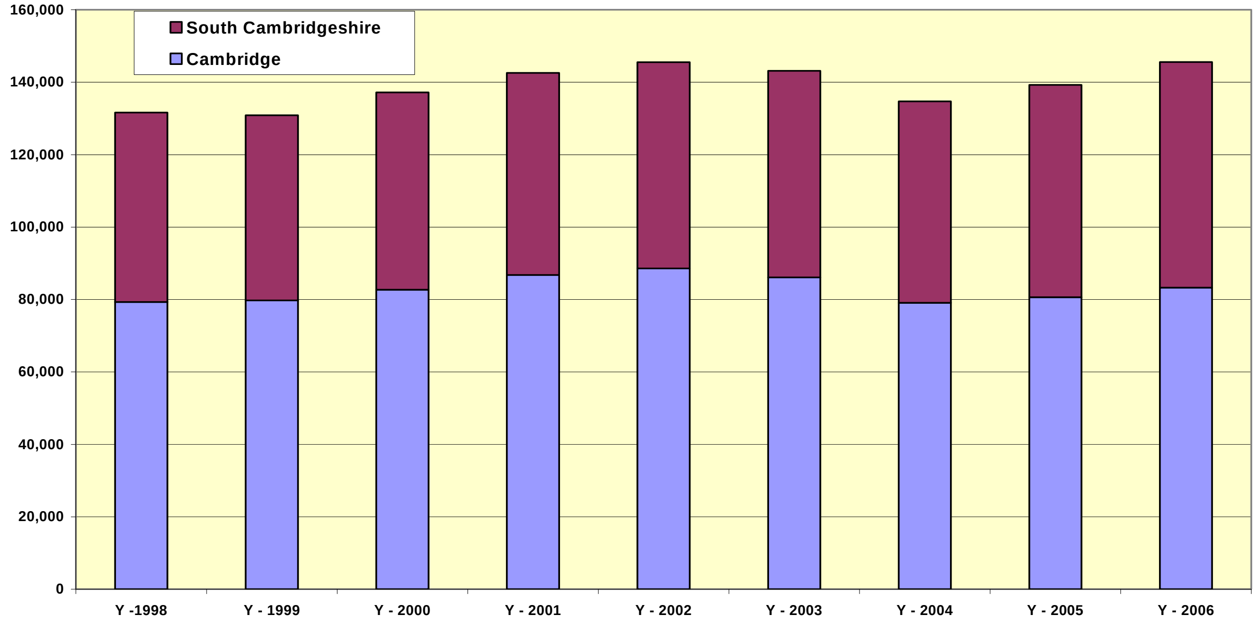
Another example of the problem arises from businesses with peripatetic staff, such as care workers, drivers and security staff. Although these workers have many different workplaces, they are counted under the ABI survey at their pay points.

These examples tend to result in an over-estimate of the actual number of staff in major towns and cities where agencies and employers have their offices. There will be a corresponding under-counting of employment in surrounding rural areas.

It should be noted the 2006 survey was held in September instead of December and this will create a discontinuity in those industry sectors with highly seasonal employment, such as retailing. In addition the 2006 data is only available in draft form and could be subject to revision.

To sum up, the ABI provides a mechanism for allocating employee jobs to locations – but is not necessarily the best measure of where people actually work. For that we have information from the Labour Force Survey, which covers residents in households.

Employee Jobs in Cambridge City & South Cambridgeshire, 1998 to 2006, (source Annual Business Inquiry: 2005/6 data subject to change)



Source: ABI (ONS), Cambridgeshire County Council Research Group

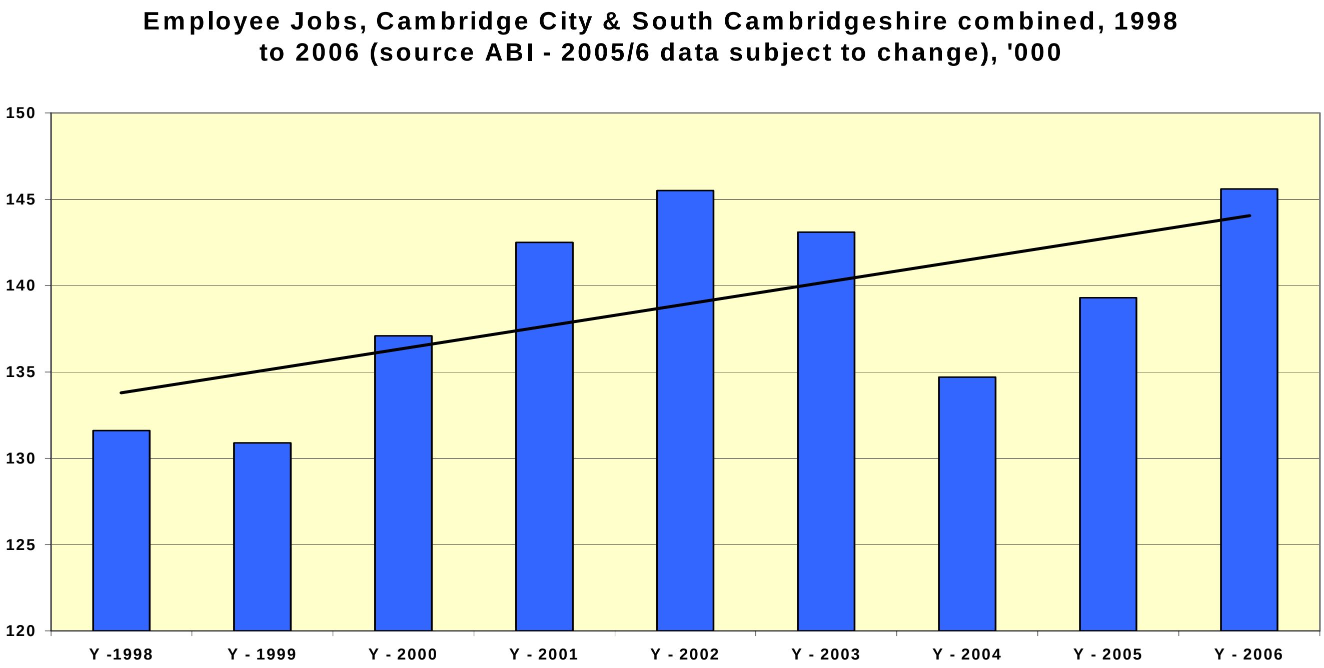
The above figure shows that the employee estimates for the two districts vary significantly from year to year. The figure suggests relatively little or no job growth in Cambridge City over the period but an upward trend in South Cambridgeshire. Given the close links between Cambridge and South Cambridgeshire (so that on occasion an employer can be included in different districts in subsequent surveys), it is prudent to consider the estimates of jobs for both districts together.

Bearing in mind the caveats attaching to the data, the trend line (shown in the figure below) suggests employee job growth of 7,000 in the period 2001 – 2006 (from 137,000 to 144,000). This is a very tentative finding when compared with the data in Table A.1, but does tend to corroborate more recent forecasts that employment growth will be at a lower rate than that required (of over 12,000 jobs during the period) to meet the indicative job target in the RSS.

Table A.1: Estimates of Employees in Cambridge City & South Cambridgeshire, Dec 2000 to Dec 2005

District	Y - 2000	Y - 2001	Y - 2002	Y - 2003	Y-2004	Y-2005	Change 2000 2005	% change 2000-2005
Cambridge	82,718	86,767	88,582	86,133	79,115	80,622	-2,096	-2.5%
South Cambridgeshire	54,434	55,777	56,913	56,986	55,614	58,658	4,224	7.8%
City & South Cambs	137,152	142,544	145,495	143,119	134,729	139,280	2,128	1.6%

Source: ONS Annual Business Inquiry



Labour Force Survey

The LFS and the more recent Annual Population Survey are outputs of the Office for National Statistics (ONS). They involve surveys of households with some additional information on students and nurses living in residences. The surveys are potentially extremely valuable as they not only ask about whether people work – and the industries they work in – but also about where they are employed. In theory, the LFS/APS can provide information to monitor the relationships between employed residents and workplace populations, hence labour supply/ demand balances. It is critical to note that this analysis is about people, not jobs. There are increasing numbers of people with two or more jobs as part time employment becomes the norm in some services industries. It includes self employed but not armed forces living barrack accommodation.

Although data relating to employed residents has been published for some years, the ‘workplace population’ estimates are much more recent and have only been produced since 2004. This makes it difficult to monitor change since 2001. However, a proxy count for 2001 can be made using information from the 2001 Census as a baseline. This gives us the relationship between where people lived and worked. We then look at the LFS for employed residents in 2001 and compare this with the 2001 Census. The LFS is generally higher, because a) it counts people working aged over 75, which the Census excluded; and b) it is generally agreed that some people working only 1 or 2 hours or for a family-run business did not consider this sufficient to include in the Census.

However, we assume that the 2001 Census gives a good measure of the balance between workplace and resident population.

The LFS/APS now asks people about their workplace but assumes people know the District they work in. This is a problem in the Cambridge area where many more people think they work in the administrative area of Cambridge City than they actually do. As they stand APS figures indicate net in commuting to Cambridge City of 42,700 people, well above the 2001 Census flow of 29,460 - and net out – commuting from South Cambridgeshire of 8,300, significantly higher that the 2001 Census estimate of 5,060. Consequently the LFS estimate of the workplace population is too high in Cambridge and too low for South Cambridgeshire.

We also have to be aware of some more pitfalls with the LFS/APS with regard to Cambridge. The methodology adopted for estimating the numbers of students in work means that there will be an over-estimate in the City. The LFS does not survey students in residences/college accommodation directly. Instead it surveys the parents of students and asks if their children are working. The children of parents so surveyed in Cambridge will generally be at universities/colleges elsewhere in the country – yet their 'activity rates' are applied to students in Cambridge. As the University of Cambridge forbids undergraduate students from working in term-time, the LFS tends to overestimate the size of the labour force living in the City.

Table A.2: Employed Residents & Working Populations Compared: 2001 Census & 2005/06 Annual Population Survey, Cambridge City & South Cambridgeshire

Area	Emp residents 2001 Census	Emp residents LFS 2001	Working pop 2001 Census	Net commuting 2001 Census	Emp residents APS Oct '05 - Sep '06	Work pop APS Oct '05 - Sep '06	Net Commuting APS Oct '05 - Sep '06
Cambridge City	49,200	57,000	78,800	29,600	59,100	96,400	37,300
South Cambridgeshire	69,200	70,000	64,200	-5,000	71,500	67,900	-3,600
Combined districts	**118,400**	**127,000**	**143,000**	**24,600**	**130,600**	**164,300**	**33,700**

Sources: Census 2001, Nomis for LFS and APS

Table A.2 above provides the most up-to-date information from the LFS/APS, for the year October 2005 to September 2006. It shows that at 2001 the Census indicated net in-commuting of 24,600 into the combined Cambridge/South Cambridgeshire area. The 2005/06 APS shows net in-commuting of 33,700, an increase of 9,100. It also suggests, comparing the APS for 2005/06 with the LFS for 2001, that the numbers of employed residents have increased by 3,600 (up from 127,000 to 130,600).

On the face of it, this data source suggests that the working population in the combined area may have increased by 12,700 in five years. As this increase in working population will be associated with a relatively higher increase in actual jobs, the total employment increase could be 14,000 or more. So – in contrast to the ABI-based analysis – the APS suggests that employment growth in the Cambridge/South Cambridgeshire area is exceeding the RSS target. However, the ABI and LFS/APS suffer from small samples at a district level and high sampling variability which means that the data is not really robust enough to provide accurate year-on-year monitoring.

APPENDIX 9

CAMBRIDGE CITY & SOUTH CAMBRIDGESHIRE LABOUR DEMAND AND SUPPLY

Table A.3 summarises eight labour demand forecasts (jobs) for Cambridge and South Cambridgeshire.

Table A.3: Forecasts of Labour Demand (Jobs) for Cambridge City & South Cambridgeshire combined, 2001-2021 – sources: various, '000 jobs

Source of Forecast	Y-2001	Y-2006	Y-2011	Y-2016	Y-2021	Change 2001/21	% p.a change 2001/21
CE Structure Plan 2001	155.5	168.7	179.65	191.95	n.a.		1.6%
CE Structure Plan update 2002	160	171.8	184.1	195.5	n.a.		1.5%
CE LEFM 2005	164.78	172.20	180.46	190.56	201.98	**37.20**	1.1%
Exp BSL BAU 2003	159.24	169.82	180.18	190.51	200.89	**41.65**	1.3%
Exp BSL EG 21 2003	159.24	171.59	183.95	196.29	208.63	**49.39**	1.6%
Exp BSL BAU 2004	157.82	165.67	177.90	186.92	190.34	**32.52**	1.0%
Exp BSL EG21 2004	157.82	165.90	178.26	187.72	196.16	**38.34**	1.2%
Exp BSL unconstrained	157.82	170.47	187.69	201.66	211.31	**53.49**	1.7%
RSS (CE interpretation)	157.81	166.82	180.35	190.99	200.57	**42.76**	1.4%

Sources: Cambridge Econometrics; Experian BSL

The forecast numbers and rates of job growth range from a low of 32,500, at 1% pa to 53,500 at 1.7% pa (from respectively Experian BSL's 'Business as Usual' (2004) and 'Unconstrained' projections).

Table A.4: Forecasts of Labour Supply for Cambridge City & South Cambridgeshire combined, 2001 – 2021 – sources various, '000

Forecast	Y - 2001	Y - 2006	Y - 2011	Y - 2016	Y - 2021	Change 2001/21	% change 2001/21 p.a.
Structure Plan	133,950	146,450	157,500	168,800	n.a.	n.a.	1.7%
RSS submitted	123,700	137,550	150,100	161,550	173,150	49,450	2.0%
RSS July 2006 update ONS '06	123,700	137,500	148,650	157,700	165,750	42,050	1.7%
RG Cambs CC ONS '06	123,800	130,600	146,450	156,400	159,250	35,450	1.4%
RG Cambs CC SoS ONS '06	123,800	130,600	146,450	159,350	162,050	38,250	1.5%

Sources: Anglia Ruskin University, Cambridgeshire County Council, ONS (Activity rates)

Table A.4 indicates that labour supply – the resident labour force – of Cambridge and South Cambridgeshire, is forecast to grow in range from 35,450 at a rate of 1.4% pa to 49,450 at a rate of 2.0% pa – as indicated in the submitted RSS. These forecasts assume a somewhat lower life expectancy, higher household sizes and higher economic activity rates.

The final scenario – termed 'RG Cambs CC SoS ONS '06' – incorporates a higher rate of dwelling growth than the submitted RSS and includes additional dwellings proposed by the Secretary of State in her response to the Inspectors' report on the draft RSS.

Over Cambridge and South Cambridgeshire, the labour supply and demand forecasts indicate a fairly balanced growth of employed residents and workplace population.

APPENDIX 10

PREVIOUSLY UNDEVELOPED EMPLOYMENT LAND SUPPLY IN CAMBRIDGE AND SOUTH CAMBRIDGESHIRE 2007

Market Area: Cambridge	**Floorspace (sq m)**			**Density**	**Land Supply (ha)**	**Comments and Constraints**
	Light Ind. Warehousing	**Offices**	**Research and Development**			
CB1, Station Road (CA/00106/03)		14,306 net		HD	1.64	Proposal to replace 39,254 sq m (22,752 sq m B1 a/ B1 b, 11,222 sq m B2 and 5,280 sq m B8) with 53,560 sq m of B1 a
Eastern Gate, Newmarket Road (C/00373/06)		6,780		HD	0.39	Replace 6,559 sq m (B8 3,863, B1a 1,942, B1c 754 sq m
St John’s Cowley Road (C/0112503)			2,108	O	0.48	Vacant site
Academy House, Hills Road (C/00653/06)		3,902		HD	0.29	Vacant site
West of Cambridge University site (C/00961/97)			32,903 (a) (22,098 (b))	HD HD	8.54 within above	Outline consent for a) B1 b & b) Research Insts
North West Cambridge (CA/00100/04)			*40,000*	HD	4.5	Research Insts and B1 (b), **subject to evidence of need**
Addenbrookes, 2020 Vision (CA/00101/03)			115,000	HD	14.4	Bio medical / technology research institutes B1 b
(COA/00001/04)			*21,000*	HD	3.5	**Potential B1 b, land reserved to 2016**
Sub Total sq m	**0**	**24,988**	**211,011**	**235,999**		
Sub Total ha	**0**	**2.32**	**31.42**		**33.74**	

Market Area: North & West of Cambridge	Floorspace (sq m)			Density	Land Supply (ha)	Comments and Constraints
	Light Ind. Warehousing	Offices	Research and Development			
Wireless Station, Bassingbourn (S/01069/06)	2,500				0.625	Change of use to B1c/B2/B8 consent partly implemented
Bourn Airfield, Bourn (S/02531/04)	1,000 (B 2)				0.426	Maintenance and repair hanger
Cambourne Business Park, Cambourne (S/01371/92((i a and b) (S/06137/01) (ii) (S/06196/03) (iii)	8,000 (B 2) (i a)	4,978 (ii) 21,802 (i b)	4,366 (iii a) 8,300 (iii b)	O O O	2.0 (i a) 4.97 (i b) 1.23 (ii) 3.16 (iii, a, b)	Allocation/ outline consent Consented a Consented, b Potential
Cambridge North Fringe, Arbury Park (S/02379/01)		18,000		HD	3.01	Consent for B1 b
Cambridge Science Park (S/01363/02) (S/00037/06)			3,345 32,680	O HD	0.8 6.6	
Cambridge East (CA/00100/03) SOA/0009/05 SOA/00010/05 SOA/00011/05	34,000 (8 ha)	80,000 (15 ha)	12,000 (2 ha)	HD	20 - 25	Notional mix of uses * **Subject to relocation of airport**

Market Area	Floorspace (sq m)			Density	Land Supply (ha)	Comments and Constraints
	Light Ind. Warehousing	Offices	Research and Development			
Chesterton Fen Road (S/00248/05)	480				0.78	B8 in two units
Marshalls Farm, Elsworth Road, Conington (S/0036/02)	1,126				0.56	Farm conversion, pending applications for conversion to housing
Church Farm, Park Street, Dry Dryton (S/00861/06)		820		O	0.5	Farm conversion
Old Mill Site, Potton Road, Gamlingay (S/0060/06)	3,773				2.97	For relocation of Potton Ltd. from Great Gransden
Station Road, Gamlingay (S/01479/95)	13,000	13,000		O	3.92	Undeveloped allocation Consent for 26,000 B1/B2
Wellbrook Court, Girton (S/01962/03) lapsed	1,050	1,050		O	0.67	Outline consent lapsed for B1 a/ B1 c
Former Bayer Crop Science, Hauxton (SOA/00014/06)		4,000		O	2	Consent as part of mixed use scheme
Premier Brands, Histon (SOA/0005/00)	*7,400*				1.77	Saved allocation

Market Area: North and West of Cambridge	Floorspace (sq m)			Density	Land Supply (ha)	Comments and Constraints
	Light Ind. Warehousing	Offices	Research and Development			
Mereway Farm, Milton Road, Impington (S/001017/06)	6,469				1.81	Consent for B1c and B8
Cambridge Research Park, Landbeach (S/00056/03) plot 3 (S/02044/86)			7,305 31,170	O O	0.86 8.79	Plot 3 Consented Plot 4 2.04 ha Plot 5 5.3 ha Plot 8 1.45 ha
Hattons Road, Longstanton (S/0068295)			12,500	O	4.38	Subject to by pass
PA Technology, Melbourn (S/01585/06)			6,875	O	5.33	Consent for B1 b
Northstowe (SOA/00013/05)	20,000 (5 ha)	70,000 (9 ha)	46,000 (6 ha)	HD	20	Notional mix of uses * pending planning consent
Barrington Road, Orwell (S/01235/06)	650	650		O	0.67	B1a or B1c
Norman Way, Over (S/01595/03) (S/01468/01) (S/02294/06) pending	8,503 (i) 2,160 (ii)				1.71 (i) 0.44 (ii)	i) B1c, 2 and 8 ii) Consent lapsed

Market Area: North and West of Cambridge	**Floorspace (sq m)**			**Density**	**Land Supply (ha)**	**Comments and Constraints**
	Light Ind. Warehousing	**Offices**	**Research and Development**			
Papworth Business Park, (S/00919/07)	4,819	874		O	1.28	Consent for B1a, B1 c and B2
(S/00633/07)	9,456				2.27	Consent for B1 and B2
Buckingway Business Park, Swavesey (S/01793/95)	6,932				2.84	Consent for B1 and B2
Mill Farm, Middle Watch, Swavesey (S/14553/04)		1,258	13,000	O	0.4	Farm conversion
TOTAL	**131,318 (34.921)**	**216,432 (38.93)**	**164,541 (37.99)**	**512,291**	**111.841**	

Market Area: South and East of Cambridge	Floorspace (sq m)			Density	Land Supply (ha)	Comments and Constraints
	Light Ind. Warehousing	Offices	Research and Development			
Brabraham Institute, Brabraham (S/01585/02)			13,000	O	3	Consent for five research buildings
Queens Farm, Fulbourn (S/01154/04)	2,538				0.66	
Granta Park, Gt Abington						
(S/00369/06)			5,119	O	0.7	Plot 12
(S/00995/03)			6,000	O	1.22	Plots 6 and 15
(S/00576/02)			3,735	O	0.53	Plot 14 consent lapsed
(S/00779/04)			(7,306)	O	(4.79)	Existing 9,280 sq m t be replaced with 7,306 sq m
(S/01526/02)			4,780	O	1.56	Plot 1 consent lapsed
(S/02495/04)			30,660	O	16.75	Phase Two site
Genome Campus, Hinxton (S/00790/02)			14,785	O	2.71	Consent for four B1 (b) units
London Road Ind Est Pampisford (SOA/0002/00)	3,700				0.86	Allocation: potential for B1/ B2
Spicers Limited, Sawston (S/00750/01)	15,150				2.81	Consent for warehouse
Cambridge South Fringe, Trumpington Mdw						Planned provision for small scale B1 (CSF/8)
Sub Total	**21,388 (4.33)**		**78,079 (26.47)**	**99,467**	**30.8**	
TOTAL	**152,706 (39.251)**	**241,420 (41.25)**	**453,631 (95.88)**	**847,757**	**176.381**	

***** Allocation of uses and floorspace to be refined through the consideration of Area Action Plans and Master Planning.
HD and O denotes office and R&D schemes of over 5,000 sq m per ha and less than 5,000 sq m per ha respectively

APPENDIX 11
CRITERIA AND SCORING REGIME FOR ASSESSMENT OF SITES IDENTIFIED FOR POTENTIAL RELEASE AND NOMINATED FOR EMPLOYMENT DEVELOPMENT

A Environmental Constraints: Pass or Fail

- Listed building
- Conservation Area
- Green Belt
- Flood Risk
- Other constraint, eg SSSI

B Economic and Social Well Being
Deliverability: viability of development without intervention (0 – 20)
Contributes to business and employment (0 – 20)
Potential contribution to housing or alternative uses (- 0 – 5).

C Sequential Test
i) Cambridge: within the urban area of the City as shown on the Proposals Map (10):
- within 300m of the guided bus route or railway station
- on a public transport corridor (a quality bus service defined as a bus every 15 minutes).

ii) Cambridge Periphery: adjacent to the built up framework of the City (8):

iii) Northstowe (4):

iv) South Cambridgeshire Rural Centres (2):

v) Elsewhere (0):

D Accessibility Test:
Proximity of workforce (population within City, close to guided bus route or railway station or quality bus route corridor and therefore potential to travel to work by sustainable modes):

i) Excellent: Cambridge and Cambridge Periphery (4);
ii) Good: Northstowe (2):
iii) Poor (0):

Reducing the need to travel:
Yes: there is a population of 10,000 or more within 3km of the site (4):
No: there is a population of less than 10,000 within 3 km of the site (2):

Accessible by:
Foot: site to be accessed by dedicated footways linked to bus stops and wider footway network (2):
Cycle: site to be accessed by the dedicated cycle route network (2):
Bus: site within 300m of quality bus service (2):
Rail: site is within 300m of the railway station or a bus service linking to the station (2).

APPPENDIX 12
ASSESSMENT SCORES FOR SITES IDENTIFIED FOR POTENTIAL RELEASE AND NOMINATED FOR EMPLOYMENT DEVELOPMENT

SITES FOR POTENTIAL RELEASE

Site	Environ. Constraints	Econ. Social Well Being		Sequential Test					Accessibility Test						Total
	Listed building, green belt etc	Contrib to bus and jobs	Potent Contrib. to housing	City	Peri phery	North stowe	Serv cntr	Else whre	Proxi mity to work force	Reduce need to travel	Foot access	Bicycle access	Bus	Rly	
Jedburgh Court	Pass	1	- 2	10					4	2	1	2	1	0	19
Ditton Walk South	Pass	3	-3	10					4	2	2	2	2	0	22
CUP	Pass	20	-5	10					4	2	2	2	2	1	38
Adj Wellbrook Ct	Pass	0	- 3		8				4	4	1	1	2	0	17
Station Road, Gamlingay	Pass	0	0					0	0	2	0	0	0	0	2

Scores for sites for potential release	
Station Road, Gamlingay	2
Adjacent Wellbrook Court, Girton	17
Jedburgh Court, Buchan Street, Cambridge	19
Ditton Walk South, Cambridge	22
CUP, Shaftesbury Road, Cambridge	38

SITES NOMINATED FOR EMPLOYMENT DEVELOPMENT

Site	Env Const	Econ Social Well Being			Sequential Test					Accessibility Test						**Total**
	Listed Green Belt	Deliver ability	Contrib. to Bus. and Jobs	Potent. contrib hous.	City	Peri phery	N' stowe	Service Centre	Else where	Proximity to work force	Reduce need to travel	Foot access	Bicycle access	Bus	Rly	
1 Science Park Phase 1	Pass	10	20	0	-	8	-	-	-	4	2	2	2	2	2	51
2 St Johns Cowley Road	Pass	20	20	0	-	8	-	-	-	4	2	2	2	2	1	61
3 Waste Water T'ment Works	Fail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
4 Park and Ride Cowley Road	Pass	18	20	0	-	8	-	-	-	4	2	2	2	2	1	59
5 Golf Driving Range	Pass	18	20	0	-	8	-	-	-	4	2	2	2	2	1	59
6 Chesterton Sidings	Pass	10	15	- 5	-	8	-	-	-	4	2	2	2	2	1	41
7 Coldhams Lane landfill	Pass	2	10	0	-	8	-	-	-	4	2	2	2	2	1	33
8 Rail side Rustat Road	Pass	4	20	0	10	-	-	-	-	4	2	2	2	2	2	48
9 Michael Young Centre	Pass	15	10	0	10	-	-	-	-	4	2	2	2	2	2	49

Site	Env Const	Econ Social Well Being			Sequential Test					Accessibility Test						**Total**
	Listed Green Belt	Deliver ability	Contrib to bus. and jobs	Potent. contrib hous.	City	Peri phery	N' stowe	Service Centre	Else where	Proximity to work force	Reduce need to travel	Foot access	Bicycle access	Bus	Rly	
10 Add'bks Bio medical campus	Pass	20	20	0	-	8	-	-	-	4	2	2	2	2	1	61
Land at Anstey Hall	Fail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Land East Hauxton Hall	Fail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Land at Madingley Road	Fail	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Scores for sites nominated for employment			
Land at Anstey Hall	fail	Michael Young Centre, Purbeck Road	49
Land East of Hinxton Road	fail	Science Park Phase 1 (intensification)	51
Land at Madingley Road	fail	Park and Ride, Cowley Road	59
Waste Water Treatment Works	fail	Golf Driving Range, Cowley Road	59
Coldhams Lane (landfill)	33	Addenbrookes Bio Medical Campus (safeguarded land)	61
Chesterton Sidings	41	St John's, Cowley Road (intensification)	61
Rail Side, Rustat Road	48		

APPENDIX 13
CRITERIA FOR SECOND ASSESSMENT OF SITES NOMINATED FOR EMPLOYMENT DEVELOPMENT

Sustainable Development:
- scores for sequential and accessibility tests (see Appendix 12);
- previously used land or green field;
- make the most of the development potential of land.

Employment Generating Development:
- high technology and related industries and services concerned primarily with research and development including D1 education uses and associated sui generis research institutes which ca show a need to be located close to the Universities or other established research facilities or associated services in the Cambridge area;

- other small scale industries contributing to a greater range of local employment opportunities;

- the provision of office and other development providing essential services to Cambridge as a local or sub regional centre; and

- other potential alternative uses.

Future market requirements:
- types of premises (market segment);
- established business and property investment market;
- contribution to future employment floorspace requirements

Environmental Capacity and Quality of Wider Environment:
- transport impact assessment;
- site access and infrastructure requirements; and
- impact on cityscape/ landscape and amenity of adjoining uses.

APPENDIX 14
ASSESSMENT SCORES OF NOMINATED SITES WITH POTENTIAL FOR SUSTAINABLE EMPLOYMENT DEVELOPMENT

Site	Sustainable Development			Employment Generating Development				Future Market Requirements			Environmental Capacity		
	Test Score *	Brown Green Field	Density High/ Low	High Tech	Small Scale Ind.	Offices (sub reg)	Other uses	Mkt Seg ment	Inv. Mkt.	Future supply	Trnspt impact	Access & Infra	Impact On amenity
Coldhams Lane (landfill)	21	B	H		Y			B1 B2	Y	Mkt. gap	medium	Restore land	positive
A'brookes (safeguarded land)	21	G	H	Y			No	B1 b D1 Sui g	Y	Strategic	high	Cap – city limits	Poss. poor
St John's Cowley Road	21	G	H	Y			No	B1 b	Y	Mkt. gap	medium	some	limited
Science Park Phase 1	21	B	H	Y			No	B1 b	Y	Mkt. gap	high	some	limited
Park and Ride, Cowley Road	21	B	L				Depot		Y	Essential service	medium	Re - locate Park & Ride	limited
Golf Driving Range, Cowley Road	21	B	L				Depot	B1/2	Y	Essential service	medium	None	limited
Chesterton Sidings.	21	B	H				Mixed use	B1 a	Y	Mkt. gap	medium	New access	Positive
Michael Young Centre	24	B	H		Y			B1 c	Y	Mkt. gap	low	some	limited
Rail Side, Rustat Road	24	B	H			Y	Mixed use	B1 a	Y	Mkt. gap	medium	new access	Poss. poor

* Sequential and accessibility tests scores from first assessment see Appendix 12

APPENDIX 15 NOMINATED SITES WITH POTENTIAL FOR SUSTAINBLE EMPLOYMENT DEVELOPMENT

Site	Development Potential (subject to planning)	Description
i) Coldhams Lane, Cambridge (landfill east).	Potential for development in the long term, subject to the the closure of Cambridge Airport and treatment of land fill	Former tip with up to 19m of land fill.
ii) Addenbrookes (safeguarded land), Cambridge.	7 ha site: potential for a total of 100,000 sq m of clinical D1 and, or, B1 (b) with B1 b estimated at 21,000 sq m	Site safeguarded and subject to review in 2016.
iii) St John's, Cowley Road, (intensification), Cambridge.	5.8 ha employment area with potential for + 6,500 sq m of B1 (b) development.	Potential buildings for intensification: Ionica, Edinburgh and Platinum.
iv) Science Park, Phase 1, (intensification), Cambridge.	6.2 ha of existing development with potential for redevelopment with + 18,500 sq m of B1 (b).	Potential for redevelopment of low density single storey buildings.
v) Park and Ride site, Cowley Road, Cambridge. vi) Golf Driving Range, Cowley Road, Cambridge.	1.96 ha site with potential for development in conjunction with site vi) below. 4.68 ha site see site v) above.	Sites v) and vi) amount to 6.64 ha. Potential requirements include: - 2.85 ha for a bus depot to support growth in bus usage, - 2.59 ha for a new depot to provide essential environmental services for a growing population, - 1.2 ha for a County Council waste recycling facility
vii) Chesterton Sidings, (proposed parkway station area);	21.66 ha: Northern site 14.95 ha to be used for rail related uses, stabling, a realigned aggregates depot, growth of the above and or a rail accessed waste transfer station. Southern site 6.71 ha to the used for new Gateway Station, car parking and up to 25,000 sq m B1 (a) offices, subject to master plan.	Strategic gateway to Cambridge for rail passengers and goods (for a future proofed low carbon era) with potential for landmark offices (B1 b) and rail freight linked storage and distribution uses.

Site	Development Potential (subject to planning)	Description
viii) Rail Side, Rustat Road, Cambridge. ix) Michael Young Centre, Purbeck Road, Cambridge	1.45 ha site: potential for 10,700 sq m B1 (a) office scheme with residential, subject to Network Rail's rail utilisation study and access – given highway capacity constraints. 1.26 ha employment area with potential for small scale intensification for creative industries, notably artists studios and craft workshops	Site with potential direct access from Cambridge Station Site is occupied by a mix of office users and small enterprises.
TOTAL	**Development potential of over 81,700 sq m and 6.64 ha for depots and a waste recycling facility**	

APPENDIX 16

STAKEHOLDER CONSULTATION 22ND MAY 2007: REPORT OF PROCEEDINGS

SETTING THE SCENE: THE LOCAL DEVELOPMENT FRAMEWORKS AND EMPLOYMENT LAND REVIEWS

Brian Human, Head of Policy & Projects, Cambridge City Council

Brian Human introduced the processes and timetables for Cambridge City and South Cambridgeshire Local Development Frameworks (LDF's). Under the timetable for the Cambridge LDF, the Council will be publishing:

- the Core Strategy Issues and Options for consultation with key stakeholders from 11th June to 23rd July; and
- the Core Strategy Preferred Options for public consultation in January next year.

For the first review of the South Cambridgeshire LDF, the Core Strategy Issues and Options will be published for consultation in January 2008 in a process that will conclude with the adoption of the Core Strategy in April 2010.

Important employment land allocations are included in:

the Cambridge East Area Action Plan: this is to be the subject of an Examination in Public in July and adoption in Spring next year;

the North West Cambridge Area Action Plan for which Preferred Options are being prepared for consultation later this year; and

the Northstowe Area Action Plan, which is to be adopted by South Cambridgeshire District Council on 19th July 2007.

Brian explained that four policies in the draft revision to the Regional Spatial Strategy (RSS) have established the framework for employment land planning in the Cambridge sub region.

In the first of these policies (E1), the RSS sets an indicative target for the net growth of 75,000 jobs in Cambridgeshire for the period 2001 – 21.

In the second policy (E3), the RSS notes that Local Development Documents should ensure:

i) an adequate range of sites is identified, allocated and protected to meet the indicative job growth target; and

ii) these sites are at locations which:

- achieve a closer relationship between jobs and homes to minimise commuting;
- maximise potential use of public transport;
- give precedence to the re use of previously developed land and the intensification of use within existing sites over the release green field land; and
- meet the needs of significant sectors and clusters.

In the third policy (CSR 1), the draft revision to the Regional Spatial Strategy:

i) sets a vision for the Cambridge sub region as a centre of excellence and world leader in the fields of higher education and research with the further expansion of the knowledge based economy; and

ii) requires Local Development Documents to provide for development in the sub region focused on making the most of the development potential of land in the following order of preference:

- in the built up area of Cambridge, subject to considerations of environmental capacity;
- on the periphery of the built up area of Cambridge, on land released from the Green Belt;
- at Northstowe, linked to the guided busway; and
- on land within and on the edge of the market towns and key service centres.

Through the fourth policy (CSR 2), the Regional Spatial Strategy states that employment related development proposals in and close to Cambridge should demonstrate that they fall into the following categories:

- high technology and related industries and services concerned primarily with research and development including D1 education uses and sui generis research institutes;
- office or other development providing essential services to Cambridge as a local or sub regional centre; and
- other small-scale industries, which would contribute to a greater range of local employment opportunities.

It adds that specific provision be made throughout the sub region for the development and expansion of high technology clusters.

As one of a number of studies designed to produce a comprehensive evidence base to enable policies and proposals in the LDFs to be founded on a thorough understanding of the area's needs, the City Council and South Cambridgeshire District Council have commissioned a joint employment land review

The review is being carried out in accordance with the Government's three stage process. Under the first phase, taking stock, the analysis has drawn on the County Council Structure Plan Research and Monitoring Group's data on completions and commitments for the period 1998 – 2006.

The *provisional* analysis of this data has identified three key trends.

i) decentralisation: development has been decentralised since 1998, the result of:

- the loss over 50 ha of employment land in Cambridge (to make way for the planned regeneration of the City with over 3,000 flats and houses together with City centre and edge of centre retail and leisure schemes); and

- the development of 86 ha of new employment land of which 71 ha have been in South Cambridgeshire and 15 ha in Cambridge.

ii) *concentration:* over 60% of all new employment floorspace has been concentrated within just five sites.

These sites are Granta Park; Cambourne Business Park; Cambridge Business Park; Cambridge Science Park and Cambridge Research Park, Landbeach.

iii) *knowledge intensive:* new development has been for a more knowledge intensive economy with:

- 55% of floorspace in the Research and Development B1b use class;
- 30% in the office B1a use class; and
- 15% in the industrial and storage B1c, B2 and B8 uses classes.

Work is currently underway in quantifying the overall supply of employment land in the sub region.

The provisional findings enable us to assess whether the trends established in the period 1998 – 2006 will continue to 2021 and beyond:

i) *decentralisation:* the new allocations on the City fringe, at Addenbrookes and Cambridge East, and at Northstowe will, with dedicated bus routes, result in a more sustainable pattern of development than in the recent past;

ii) *concentration:* these allocations together with the key centres of Research and Development, at Cambridge Science Park and Granta Park, have the capacity to account for over 70% of future employment development; and

iii) *knowledge intensive:* current allocations will continue to support the development of a more knowledge intensive economy with:

- 78% of floorspace suitable for Research and Development B1b use class;
- 11% for office B1a use class; and
- 11% for the industrial and storage B1c, B2 and B8 uses classes.

These findings suggest that:

i) strategic provision has been made for research and development in all four sub markets: the University linked segment; the bio medical segment at Addenbrookes; the secure bio campuses south east of Cambridge and the private market centred on Cambridge Science Park;

ii) future provision for offices will need to be found following the sequential approach set out in the RSS; and

iii) future provision of small scale industrial and storage development will need to be reviewed, allocated, delivered and protected.

Together these findings provide useful insights for policy makers when considering the detailed planning of the strategic employment allocations at Northstowe and Cambridge East.

A MARKET PERSPECTIVE
Jonathan Hutt, Director, Savills

Jonathan Hutt noted that Savills are currently acting on behalf of clients responsible for developments at Addenbrookes, Northstowe and CB1.

i) R&D comprises four sub markets:
- Milton Road cluster between the Cambridge Science Park and Cowley Road;
- University West Cambridge site;
- Addenbrookes; and
- Bio pharma, medical technology cluster of secure sites, south east of Cambridge.

Land allocations and consents for R&D are in over supply.

ii) Offices comprises four market zones:
- zone A, the T formed by Station Road and Hills Road;
- zone B, City offices;
- zone C, City fringes;
- zone D, outside the City, for example Cambourne.

Land allocations and consents for offices are in under supply. Given the limited supply of new space coming to the market in the City centre, prospective tenants are currently negotiating rents of £25 sq ft for office in CB1 against current rents for £22.50 sq ft elsewhere in zone A and £22 sq ft at edge of City office locations.

iii) Industry:
The property sub market is characterised by a lack of supply and no planned allocations. The overall stock of 12m sq ft has remained stable during the period 1998 – 2006 but rents have climbed to £8 sq ft and £11 sq ft for trade counters.

Market experience of current planning policies raises the following questions:

a) are user restrictions a good way in which to build a balanced economy and still appropriate when users in the financial and business services sector are responsible for the two thirds of the current take up of offices in Cambridge?

b) is the distinction between Research and Development as B1 (b) and office as B1 (a) being enforced (as the market only regards the Cambridge Science Park and the secure sites as pure B1 (b))?

c) are car parking restrictions on new build offices in the City centre still appropriate as developers are escaping the policy by refurbishing their buildings but at a cost to user requirements and potential improvements to the townscape?

ROUND TABLE DISCUSSIONS

TABLE A: What are the cases for either retaining Cambridge's historic industrial areas or changing their use to housing, subject to the relocation of firms and jobs to the City fringe?

Introductory Commentary: On the policy side, the Government has set targets for new housing development to be on previously developed land within urban areas. On the market side, landowners have released employment land for higher value uses.

Since 1998 over 50 ha of employment land in Cambridge has been lost and replaced by 15 ha of new development in Cambridge and 71 ha in South Cambridgeshire.

The decentralisation of employment development has enabled the regeneration of central areas of Cambridge with over 3,000 flats and houses as well as City centre and edge of centre retail and leisure schemes. It has also created employment schemes dependent on car based commuting which may be unsustainable in a low carbon economy.

This raises the issues for debate:

- to what extent should the Council seek to extend the protection of the City's remaining employment sites on the grounds of reducing the need to travel by workers and firms supplying, supporting and servicing the City? or
- to what extent should the Council reallocate further historic industrial areas to allow for other uses and link this development to the provision of industrial and warehousing accommodation on new allocations for Cambridge East and Northstowe?

Discussion: The group established a consensus for protecting what remains of the Cambridge's industrial areas on the basis of:

- keeping businesses that serve the City, close to the City; and
- maintaining a healthy mix of job opportunities in the Cambridge

This consensus suggests the need for the City Council, as an industrial land and property owner, to protect employment uses and, as the local planning authority, to review the effectiveness of relevant policies the 2006 Local Plan:

7/2 Selective Management of the Economy: this policy states that employment proposals will only be permitted if it can be demonstrated they meet certain requirements including, among other things, a special need to be located in the City; and

7/3 Protection of Industrial and Storage Space: this policy states that development that result in the loss of B1 (c), B2 and B8 will not be permitted where the site is identified as a protected site and elsewhere only if one or more of five tests are met. One test allows for the loss B1 (c), B2 and B8 floorspace where 'redevelopment for mixed use or residential development would be more appropriate.

Having established the merits of this policy stance the discussion raised the following points:

i) B1(c) uses are vulnerable to changes to B1(a) or B1(b);

ii) Existing employment properties will need to be refurbished or redeveloped to meet changing business needs;

ii) New employment land allocations planned close to the City (at the Northern Fringe East and Cambridge East) would:

- improve business efficiency by combining proximity to City markets without increasing congestion in the City;

- limit the need for workers to travel; and

- potentially allow for the relocation of firms (which don't need to be in the City centre) and as a result: retain their workforces, pave the way for housing to redress the jobs / homes imbalance and reduce congestion arising from in commuting.

TABLE B: What are the cases for reviewing Cambridge's older offices and intensifying development within Cambridge's newer employment areas?

Commentary: In line with Local Plan policies in place between1996 – 2003, new office development has been decentralised to the City fringe and ex urban locations, which are dependent on car based commuting.

In the period since 1998, developers have refurbished rather than redeveloped City centre offices (in order to remain free of user restrictions, commuted sums for public transport infrastructure and stricter car parking standards).

Since the 2003 Structure Plan and 2006 Local Plan policies, that limited increases in the floorspace of central and intermediate area offices to 10% over existing, were dropped to promote more sustainable forms of development.

In 2006 Cambridge City Council refused a comprehensive redevelopment proposal near the Station for 65,000 sq m of offices. Although in a highly sustainable location, the high density of the scheme introduced a number of significant urban design, infrastructure and conservation and other planning difficulties.

This raises the issues for debate. To plan for the future supply of offices:
- how will current trends in the utilisation of offices affect future demand; and
- in the context of these trends with how much confidence can we use historic employment density figures to predict new office floorspace requirements?

To plan for a sustainable pattern of development:
- should the City Council allow the change of use of older offices in the City for alternative uses and South Cambridgeshire District Council plan for future provision at Northstowe and Cambridge East? or
- should both Councils explore ways of encouraging owners to either replace existing offices with more net usable floorspace within the City and City fringe in order to plan for a future with greater dependency on sustainable modes of transport. If so, what safeguards are needed to protect amenity, ensure high quality urban design and continued operation of the City's infrastructure?

Discussion: The group noted that there are limited opportunities for large scale office developments in the City centre, such as CB1.

Elsewhere in the City centre, developers currently prefer to refurbish offices in order to retain existing car parking provision.

It will be important to discriminate between the needs of car-based commuters who have other transport choices and others who need to use a car in the day. Car Clubs are one way of addressing the latter requirement.

Some office space is not suitable for conversion to residential uses. The operation of the market is also affecting the colleges.

This tension between policy and market imperatives raised two alternative arguments:

i) the need for flexibility: this argument suggests the need to take a flexible approach to stricter car parking standards as currently there are no winners:
- the policy objective of reducing car parking provision is not being met as developers are circumventing the policy; and
- the market objective of meeting business users' demand for modern accommodation with car parking is being compromised.

ii) the need to reduce reliance on car parking: this argument suggests that in a low carbon future it will be imperative for people to travel by more sustainable modes of transport. This suggests the need to align jobs with homes, locate employment development close to public transport routes and improve public transport services and introduce car-sharing schemes.

Under the current policy stance, the shortage of new office space in prime City centre locations is putting upward pressure on rents at the expense of users who have a special need to be located in Cambridge.

TABLE C: What needs to be done to ensure housing and employment sites are built together to deliver balanced and comprehensive development in Northstowe and Cambridge East?

Commentary: The Area Action Plan for Cambridge East provides for 10-12,000 dwellings and 4 – 5,000 jobs (net) on 20 – 25 ha of employment land and the Area Action Plan for Northstowe identifies the site for 8,000 dwellings and 20 ha of employment land.

The analysis of employment development trends since 1998 has identified some evidence of landowners land banking new employment allocations in the hope of later change of use to housing.

This market pressure has led to a key challenge in planning for the right employment land development in the right place and at the right time.

These challenges raise the issues for debate:

- are there lessons to be learned for the future planning of Northstowe and Cambridge East from recent experience in the allocation of housing and employment land in developments such as Cambourne and Longstanton?

- in the light of this experience should the Councils seek to link the implementation of housing and employment land in order to deliver balanced and comprehensive development in Northstowe and Cambridge East and elsewhere?

Discussion: In the low carbon economy, we can foresee that the ability to work near to home will become an even more important part of people's standard of living and quality of life.

The group agreed that the challenge of creating a balanced community will be greater at Northstowe, as a proposed new settlement, will be greater than at Cambridge East as an urban extension.

To make Northstowe a place where people want to live and work will require an up front investment to bring forward housing and employment together with sustainable transport links.

On the other hand an approach of developing houses first would establish patterns of out commuting and jobs second would promote in commuting. However, the impact of these commuting patterns might be mitigated by the provision of high quality public service routes along the central spine of Cambridge.

The group debated free market and more interventionist approaches.

On one side it was argued that major developments require up front investment and interventions to link employment development with housing should be avoided as these increase investors' risks and costs.

On the other side the debate was concerned to define the scope and extent of interventions to align homes with jobs for community benefits.

It was concluded that the policy stances of achieving a better alignment between homes and jobs and creating balanced communities demand an integrated approach to the economic development of the sub region.

This raises the need to take a long term, proactive and integrated approach to attracting inward investment to Northstowe, developing a skilled workforce and linking together the provision of employment with housing and sustainable transport links.

TABLE D: What needs to be done to minimise the carbon footprint of new employment developments for the 21st century's low carbon economy?

Commentary: The target in the Climate Change Bill to cut carbon dioxide emissions by 60% by 2050 (against 1990 levels) signals a new regime of incentives and regulations.

Cambridge City Council has adopted a Sustainable Design and Construction SPD. This sets out an integrated approach to reducing Carbon Dioxide emissions which arise from the development and use of buildings. The key themes concern:

sustainable design for the ventilation and cooling, micro energy generation, adaptability, waste reduction and recycling, water harvesting and drainage and reducing the need to travel; and

sustainable construction for reducing the embodied energy in construction materials (which account for 10% of national energy consumption) and sustainable deconstruction for increasing the use of reclaimed and recycled material (as construction waste accounts for 50% of waste).

In the low carbon economy we could expect carbon licensing (or its equivalent) and the need by workers to travel by sustainable modes to stimulate demand from businesses for zero carbon buildings within walking distance of bus and rail routes.

The need to reduce carbon dioxide emissions raises the issues for debate:

- to meet impending carbon dioxide emission targets, will owners of existing employment buildings decide to refurbish or redevelop? And in the light of this

- should the Councils plan for the in situ redevelopment and intensification of the stock of existing employment buildings (which are in the most sustainable locations) and ensure that any new employment land allocations are accessible by foot, cycle, bus and train?

Discussion: The group noted that the Government in the Planning White Paper (published on the previous day (21st May)) has proposed to put in place a timetable and action plan to deliver substantial reductions in carbon emissions from new commercial buildings within the next ten years.

The group reached a consensus on four main points:

i) The refurbishment of an existing building could never be carbon neutral. On redevelopment, developers need a sustainable construction brief to design in order to:
- reduce the embedded carbon in the new building;
- minimise the need for heating and ventilation;
- maximise the potential of on site renewable energy generation;
- extend the life of the building; and
- plan for the deconstruction of the building in order to maximise the reuse and recycling of the construction materials.

ii) The intensification of the stock of existing employment buildings in the most sustainable locations is not happening because of the limits on car parking standards in the City centre and the availability of the out of town sites. For highly qualified staff time is money and for them the car remains the only economically viable option.

To reduce car based travel, there has to be a complementary investment in low cost public transport services.

iii) The conclusions from (i) and (ii) above suggests that policy needs to work to deliver the lowest possible overall carbon footprint, which can be best delivered through:
- redevelopment rather than refurbishment in the most sustainable locations; and
- investment in low cost, high quality public transport.

iv) The requirement for low carbon development needs legislation and informed clients. Pending new legislations and targets, the City Council could promote the Sustainable Design and Construction SPD though a programme of seminars on best practice in low carbon design and construction.

PLENARY
Steve Sillery commented Cambridge East was planned as an urban extension in order to address the imbalance between jobs and housing in the City. He added that as a landowner, the City Council had the power to retain industry in the City.

Martin Garratt referred to the GCP's recently published study, 'Economic Interventions for the Greater Cambridge Sub Region.' To meet the job target in the RSS (of 75,000 jobs in Cambridgeshire between 2001 – 2021), the sub region needs to plan for the growing sectors most notably business services (with 19,500 more jobs) as well as education with (16,800 more jobs) and the hi tech sectors (with 8,500 more jobs).

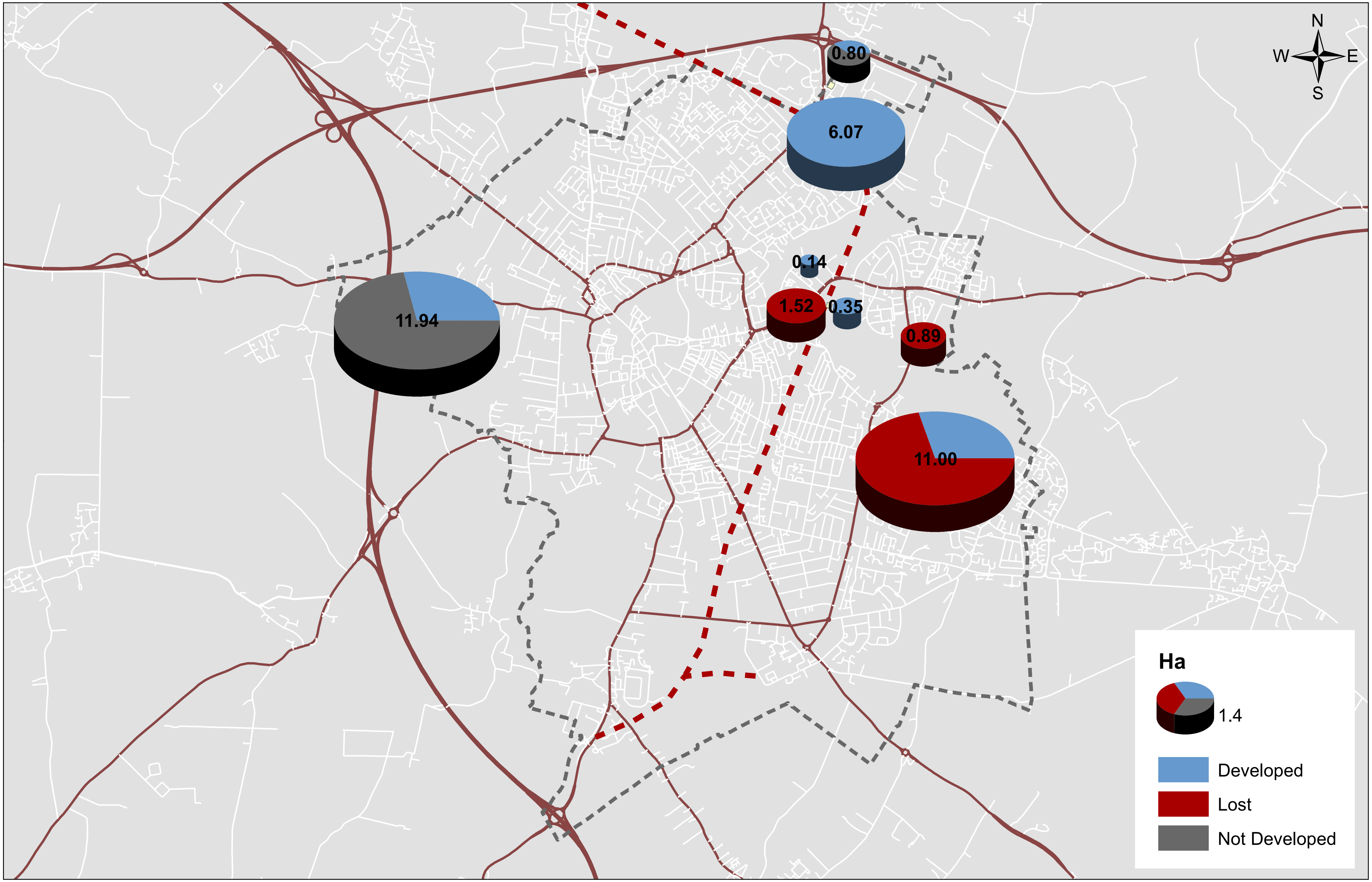
Bill Wickstead counselled caution with the use of Experian BSL's projections as these may have exaggerated the potential growth of the business services sector. Job creation would be led by the exogenous growth of the high tech sector.

Keith Miles agreed that the sub region needed to keep hold of the high tech vision, restraint on the growth of Cambridge had been loosened to enable the growth of the high tech cluster.

Myles Greensmith reported that strategic provision has been made for R&D and the evidence is telling us about the need to plan for the rest of the economy.

Brian Human added that part of nurturing the high tech cluster was recognising the role of related services and support industries. This required a positive and integrated approach to economic development, sustainability and the quality of life.

Cllr David Bard summed that that there was too close a focus on making provision for hi tech and there is a need to look at the support services and industry. But developing the sub regional economy is more than about site finding it requires a partnership between the public and private sectors and we need to meet again to revisit these issues in a few months time.



CAMBRIDGE CITY COUNCIL

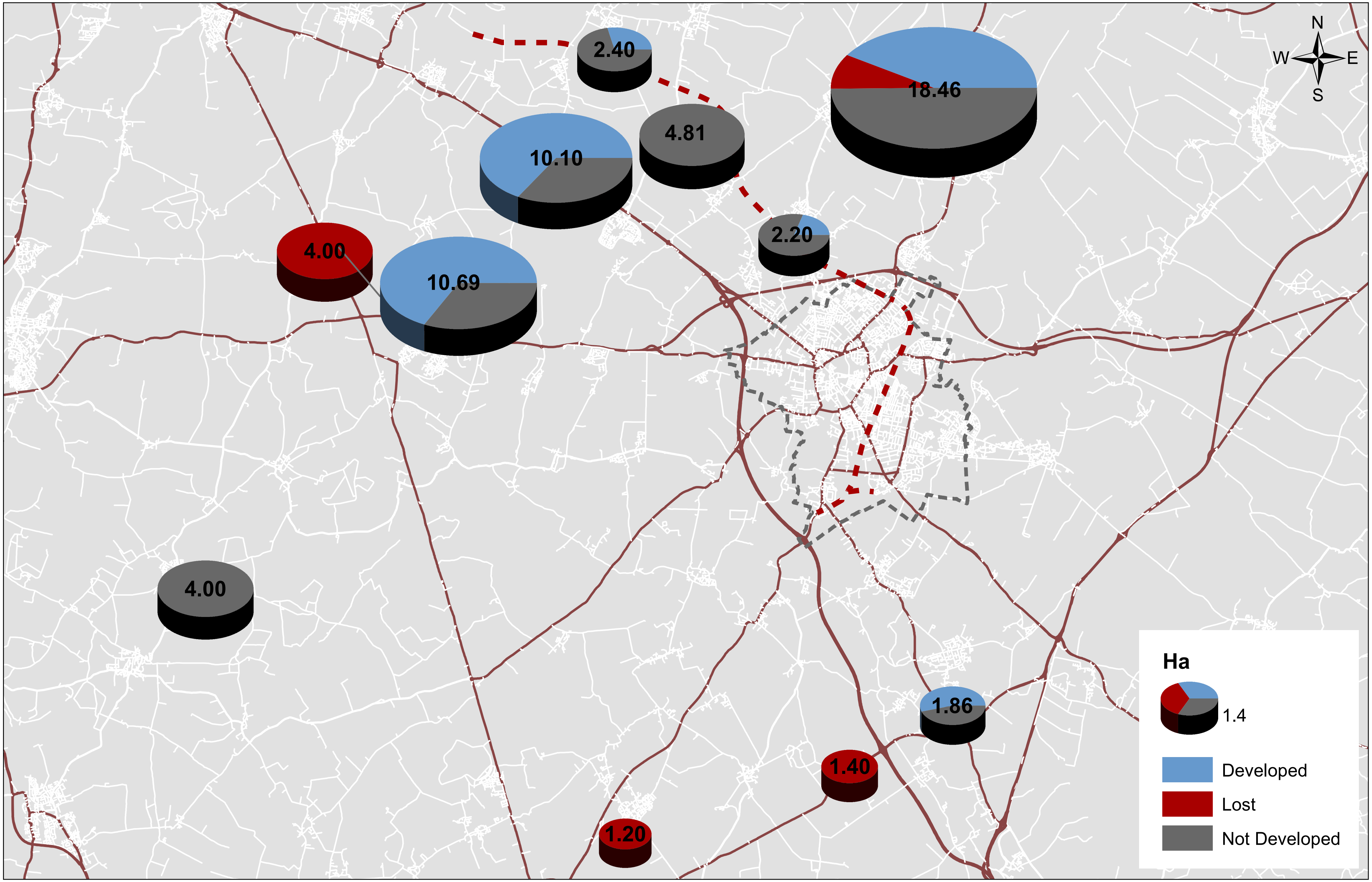
Map 1: Cambridge: Market Responses to Employment Land Allocations

Date: 16/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:57,000



Map 2: South Cambridgeshire: Market Responses to Employment Land Allocations

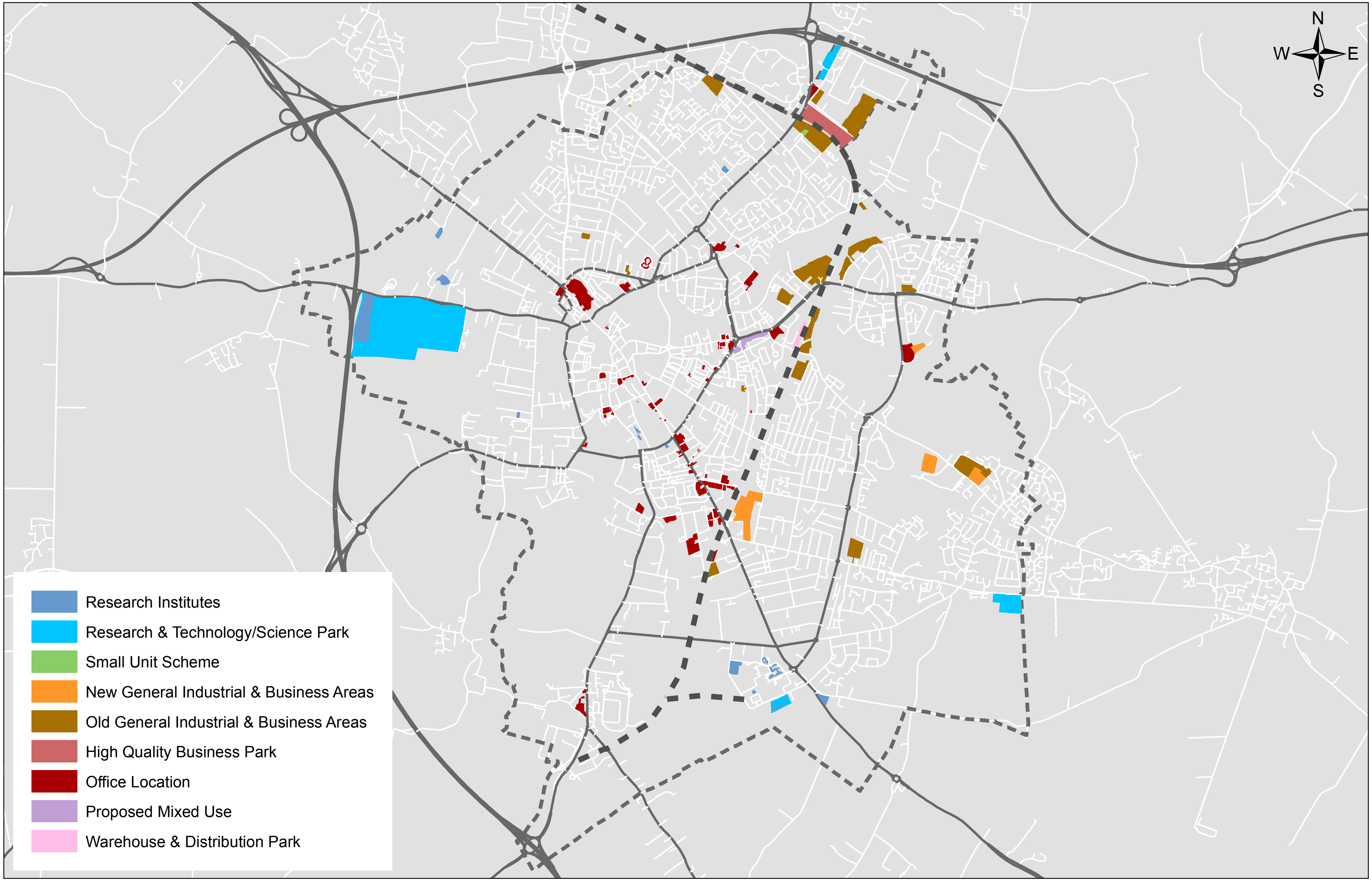
CAMBRIDGE CITY COUNCIL

Date: 16/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:165,000



Map 3: Cambridge Employment Areas

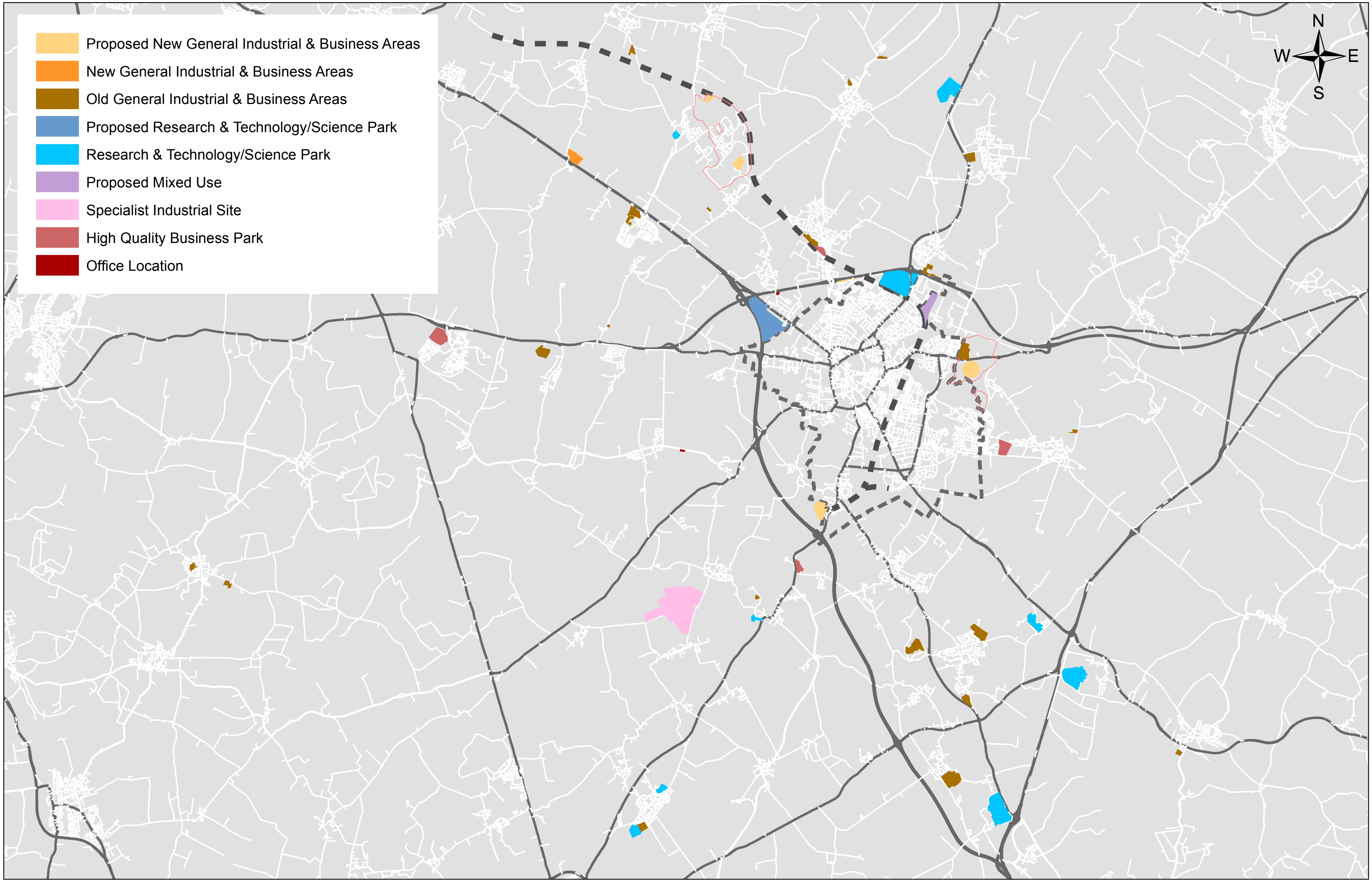
CAMBRIDGE CITY COUNCIL

Date: 08/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:56,000



CAMBRIDGE CITY COUNCIL

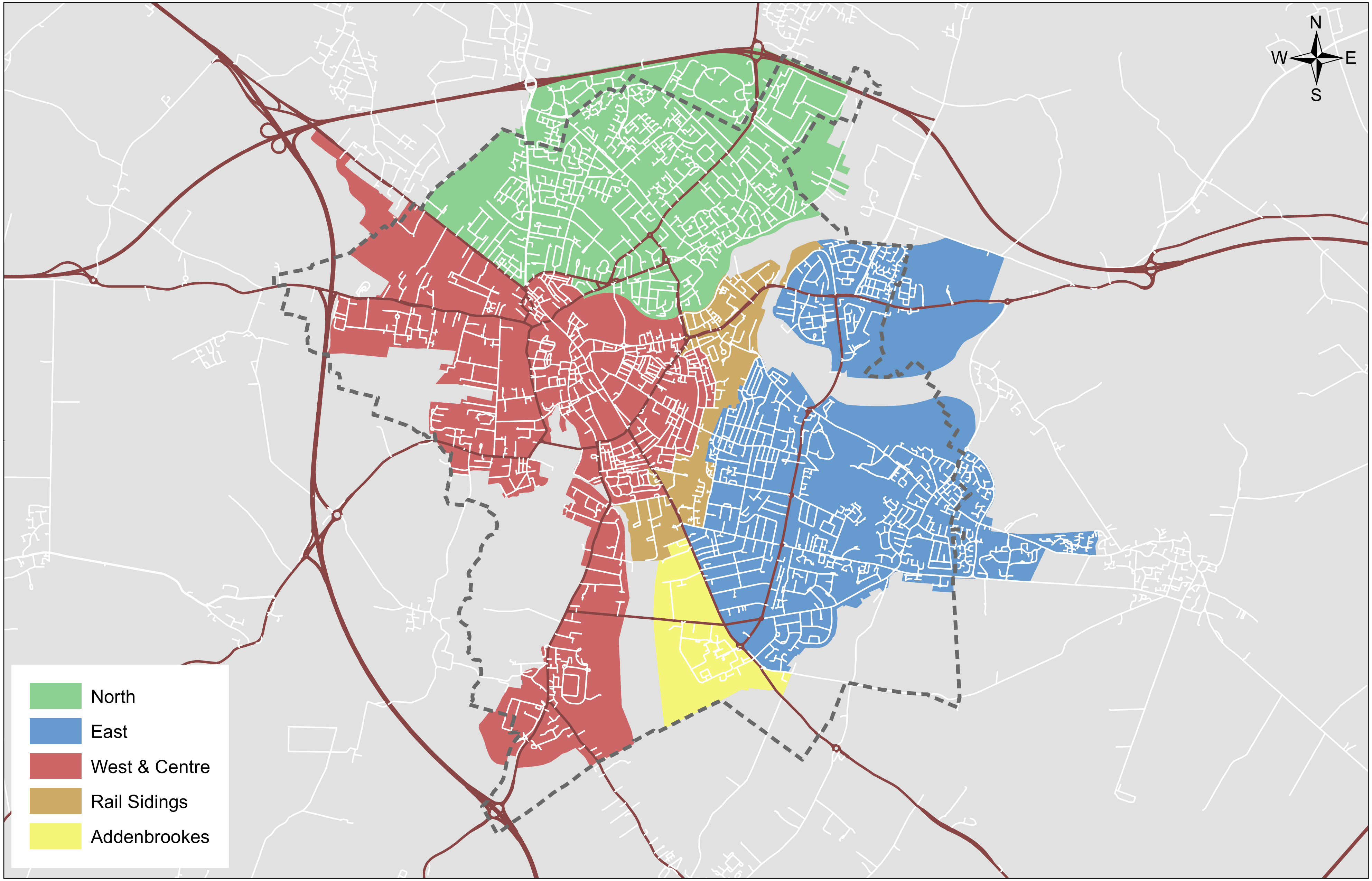
Map 4: South Cambridgeshire: Employment Areas

Date: 08/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

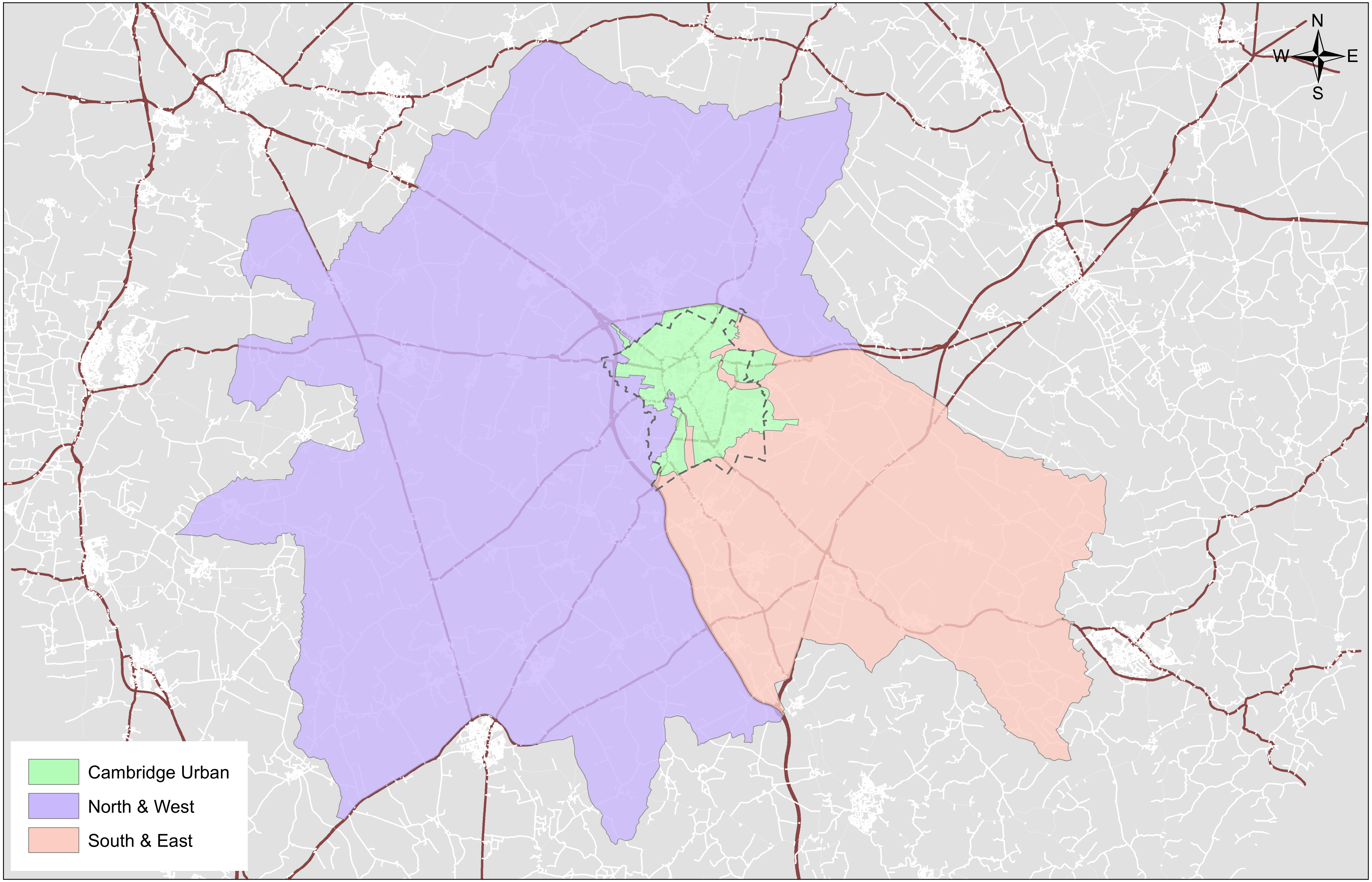
Scale: 1:170,000



CAMBRIDGE CITY COUNCIL

Map 5: Cambridge Employment Property Sub Markets

Date:	16/10/07
Produced by:	James Wilson
Section/Department:	Policy & Projects, Environment & Planning
Scale:	1:60,000



Map 6: South Cambridgeshire Employment Sub Markets

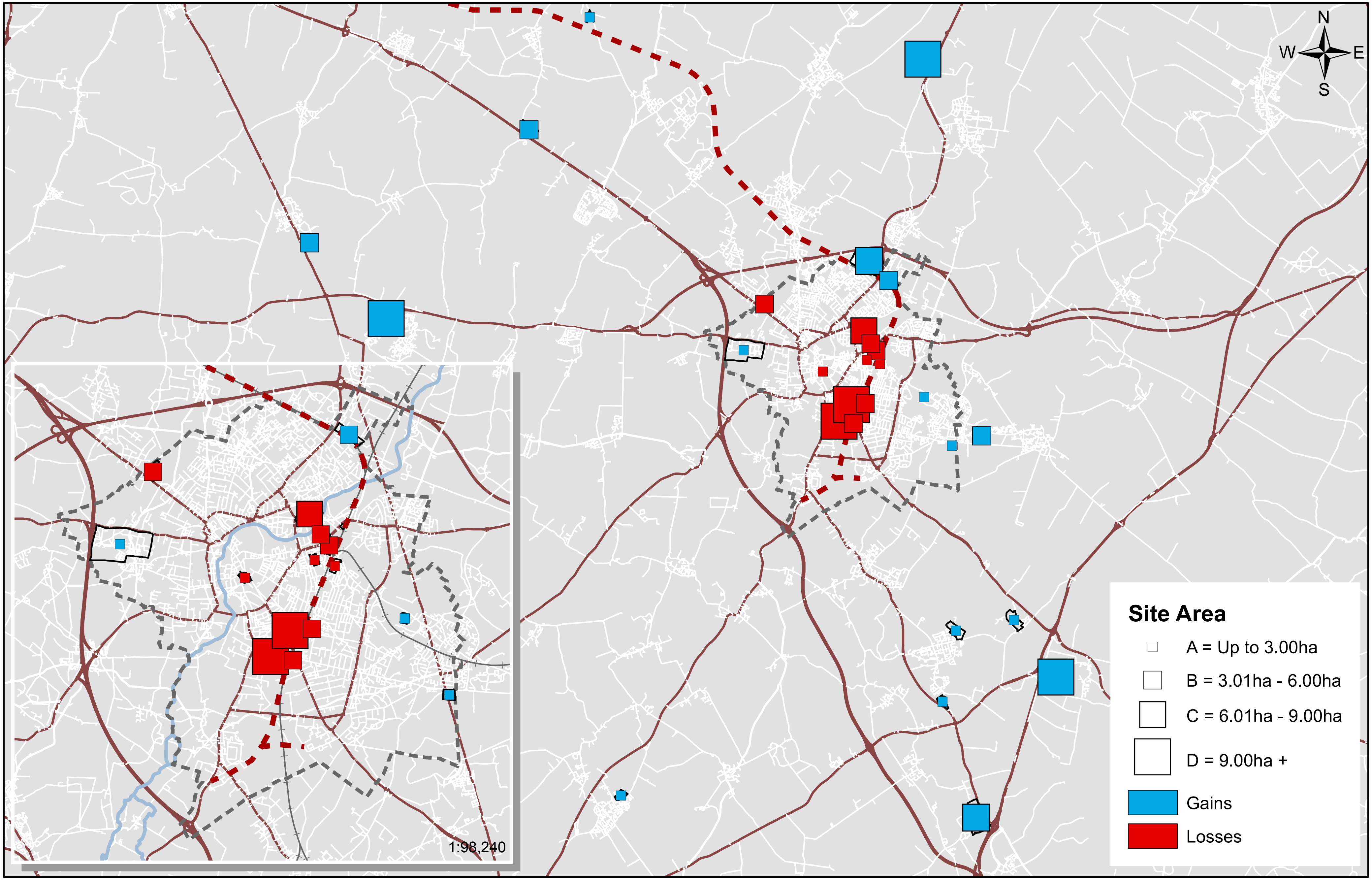
CAMBRIDGE CITY COUNCIL

Date: 16/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:245,000



Map 7: Employment Land Gains and Losses Since 1998

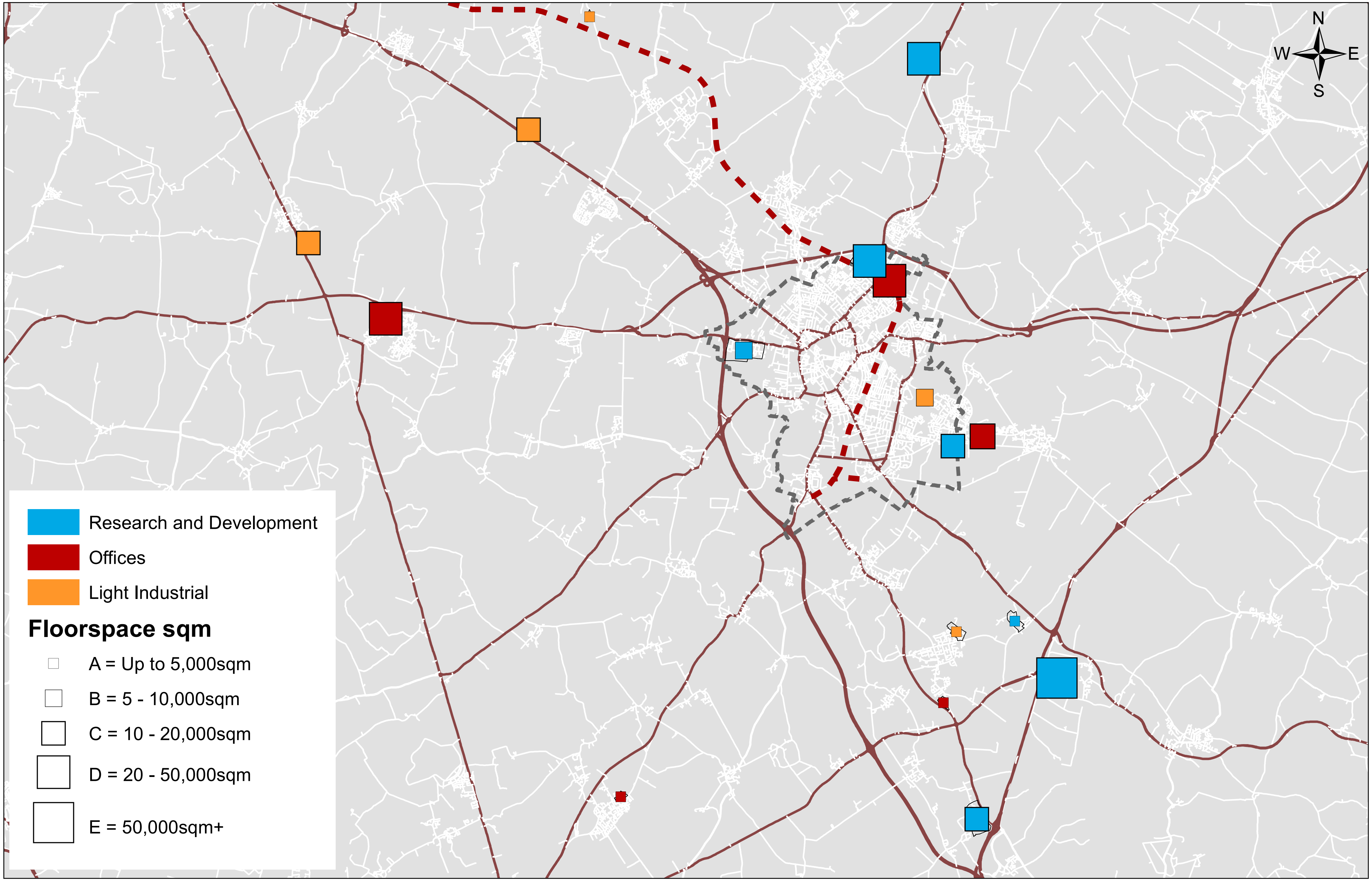
CAMBRIDGE CITY COUNCIL

Date: 18/10/07

Produced by: James Wilson

Section/Department: Policy & Projects, Environment & Planning

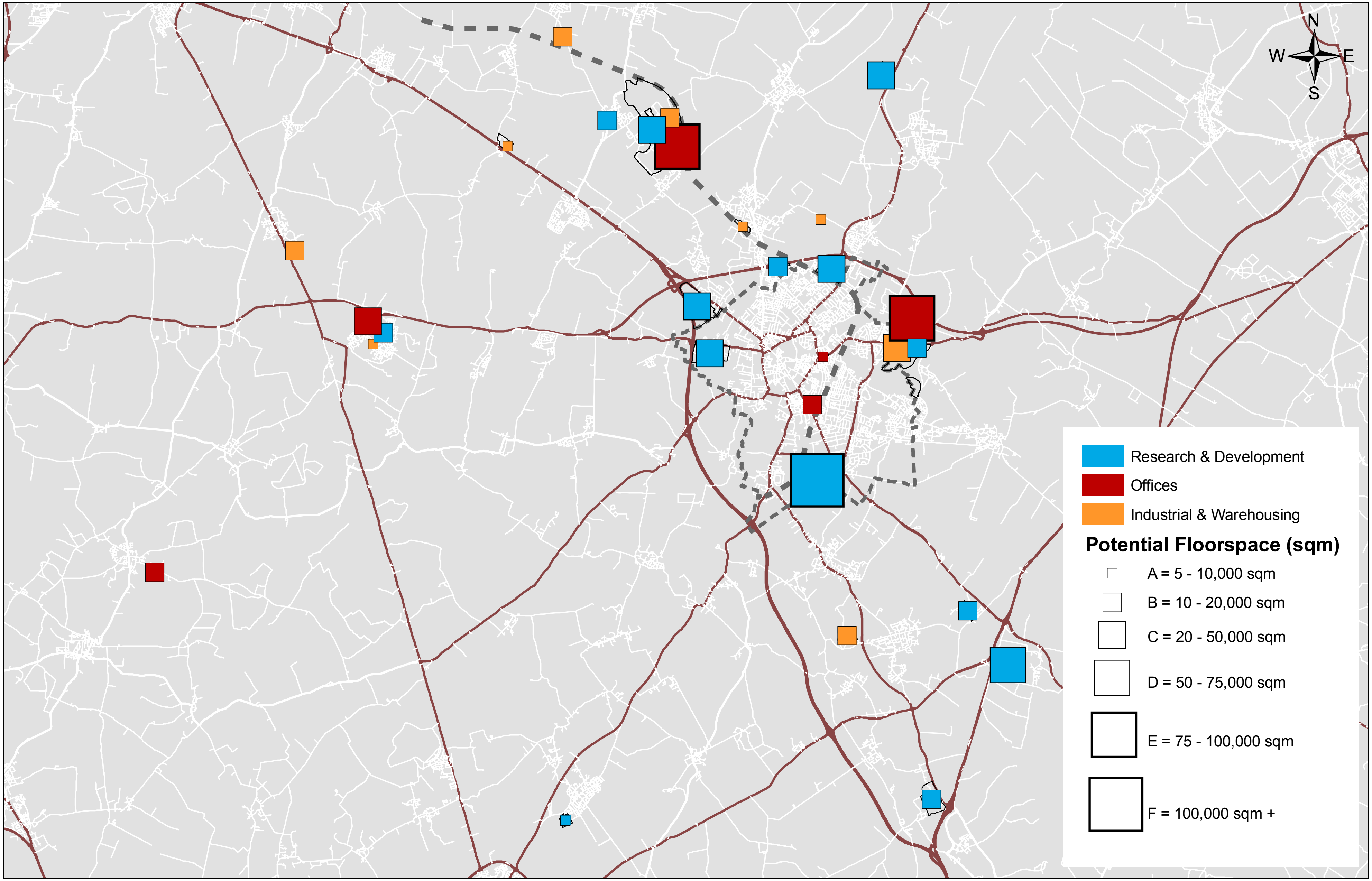
Scale: 1:155,000



Map 8: Knowledge Intensive Developments Since 1998

CAMBRIDGE CITY COUNCIL

Date: 18/10/07
Produced by: James Wilson
Section/Department: Policy & Projects, Environment & Planning
Scale: 1:162,000



CAMBRIDGE CITY COUNCIL

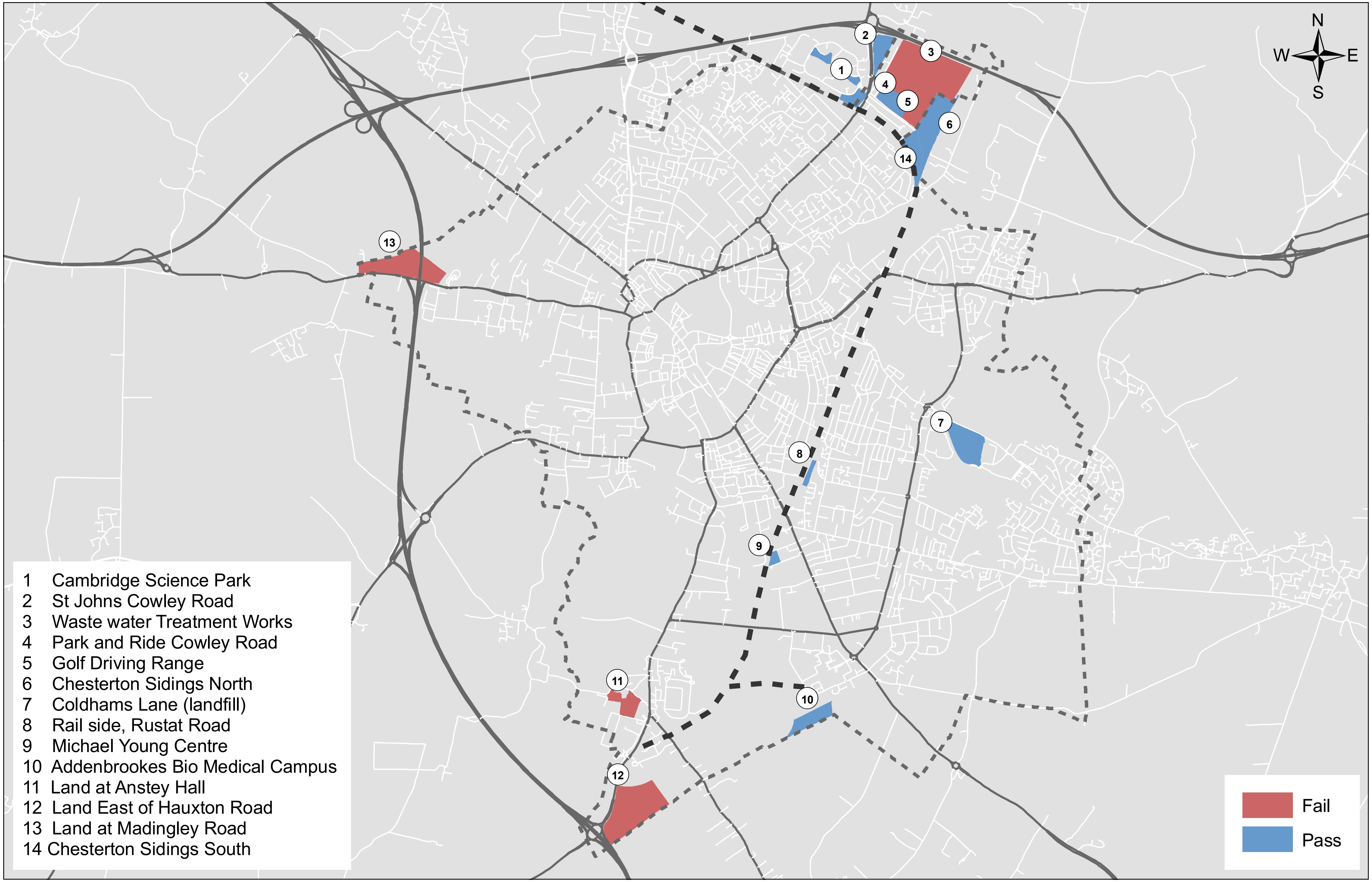
Map 9: Current Employment Land Commitments & Allocations

Date: 09/07/08

Produced by: Matthew Merry

Section/Department: Policy & Projects, Environment & Planning

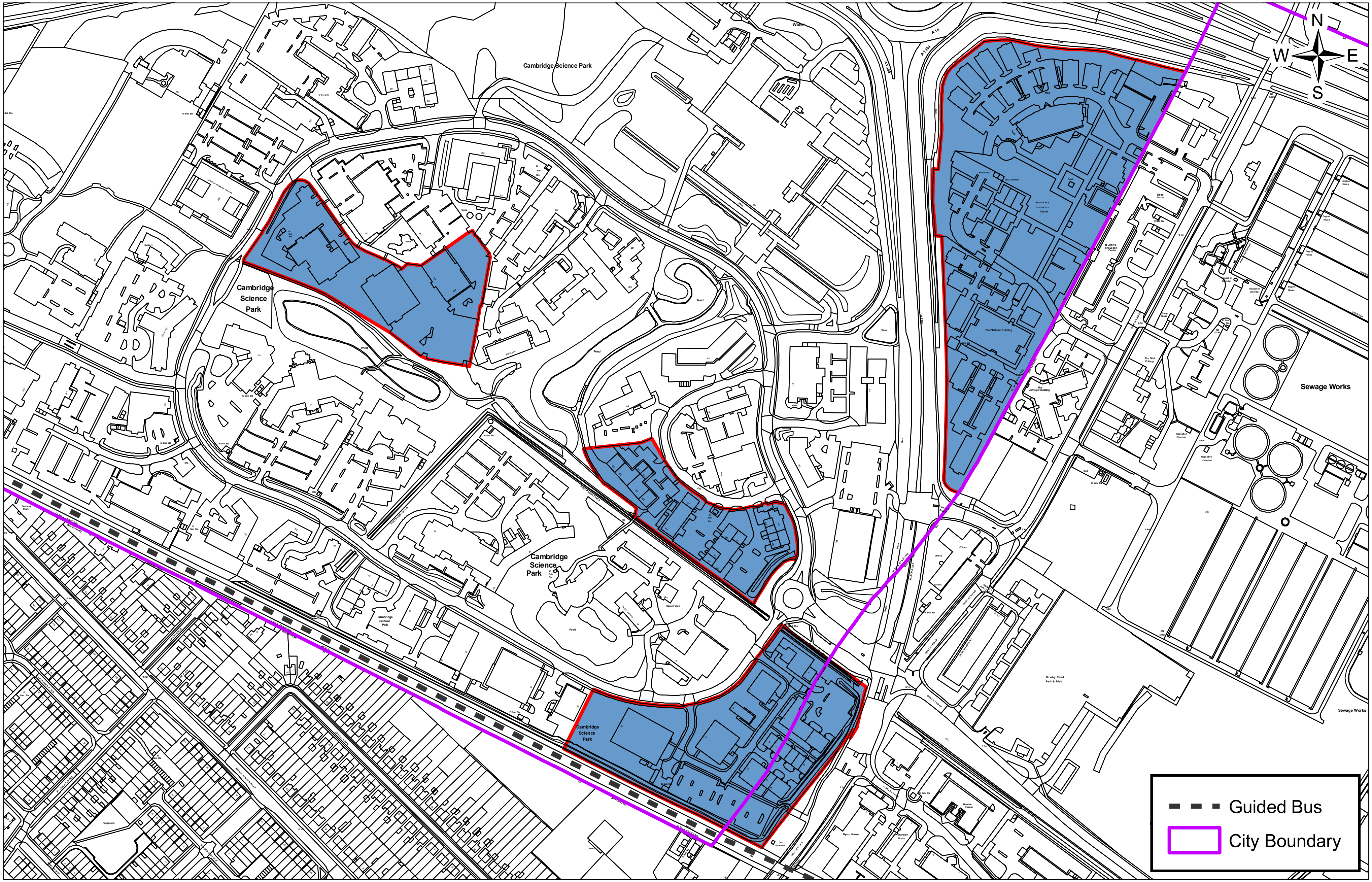
Scale: 1:170,000



Map 10: Nominated Sites with Potential for Sustainable Employment Development

CAMBRIDGE CITY COUNCIL

Date:	22/05/08
Produced by:	Matthew Merry
Section/Department:	Policy & Projects, Environment & Planning
Scale:	1:55,000



Map 11: Cambridge Science Park and St Johns Cowley Road

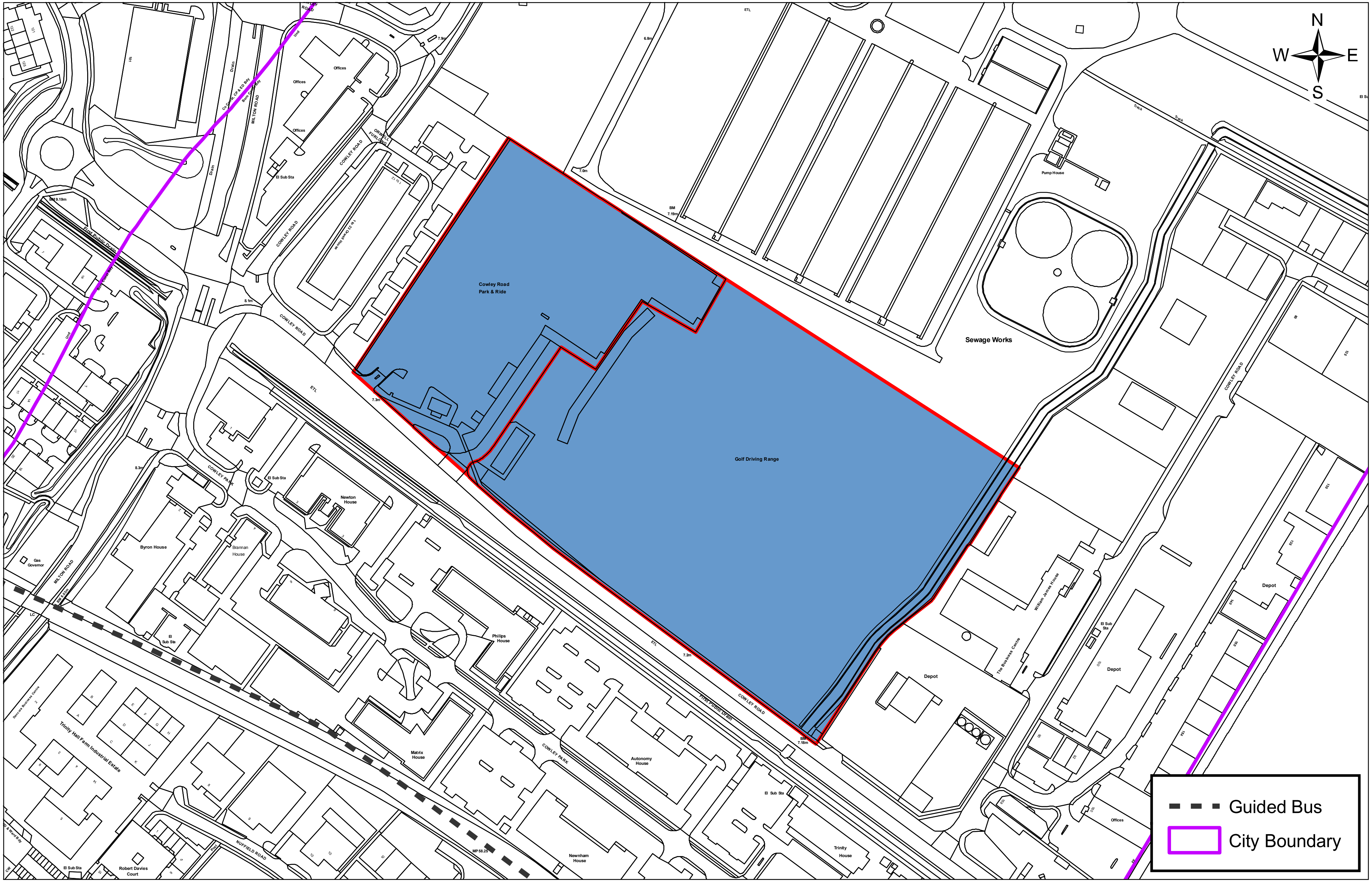
Date: 22/05/08

Produced by: Matthew Merry

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:5,000

CAMBRIDGE CITY COUNCIL



Map 12: Park & Ride and Golf Driving Range

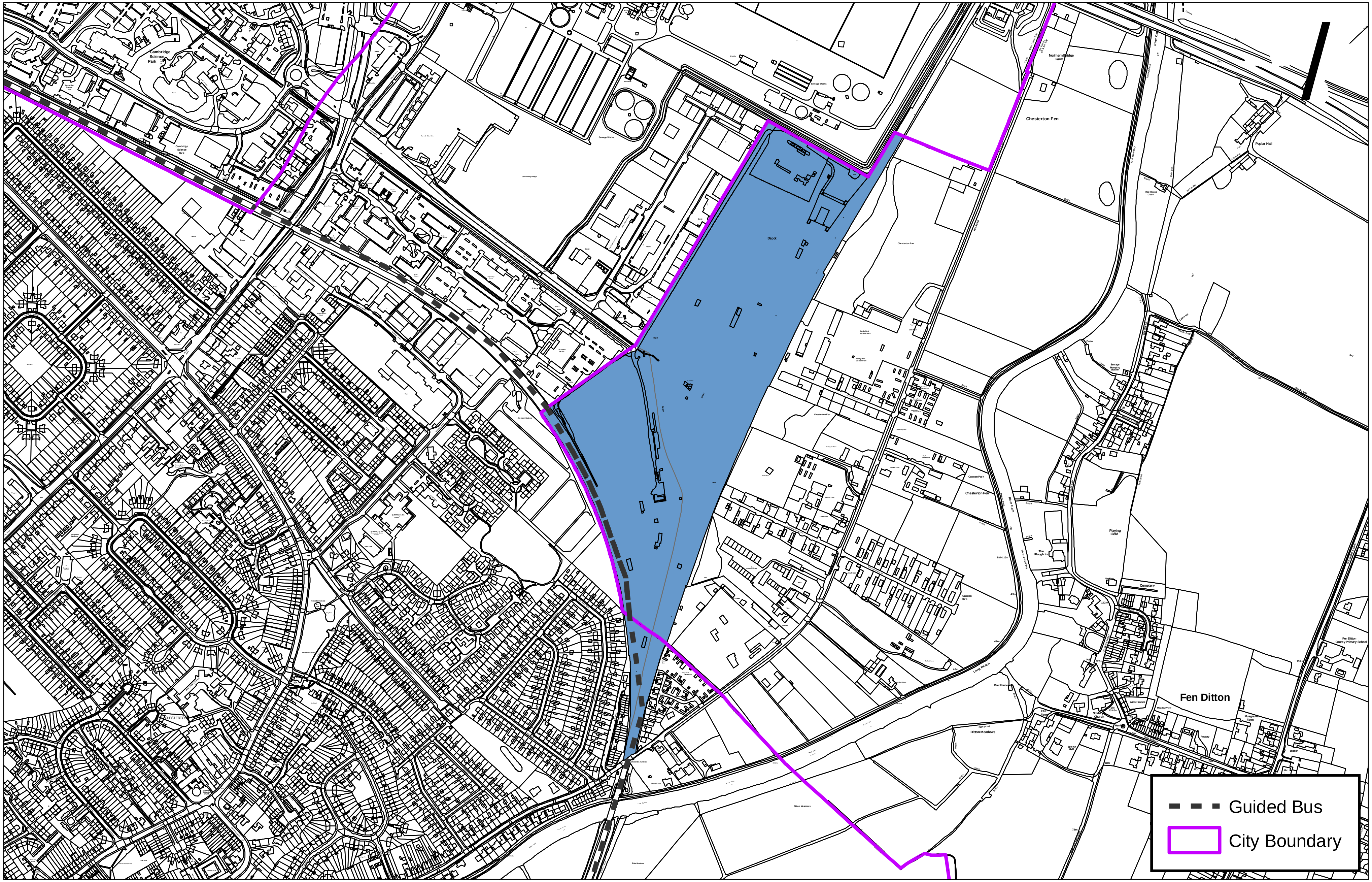
Date: 22/05/08

Produced by: Matthew Merry

Section/Department: Policy & Projects, Environment & Planning

Scale: 1:3,000

CAMBRIDGE CITY COUNCIL



Map 13: Chesterton Sidings

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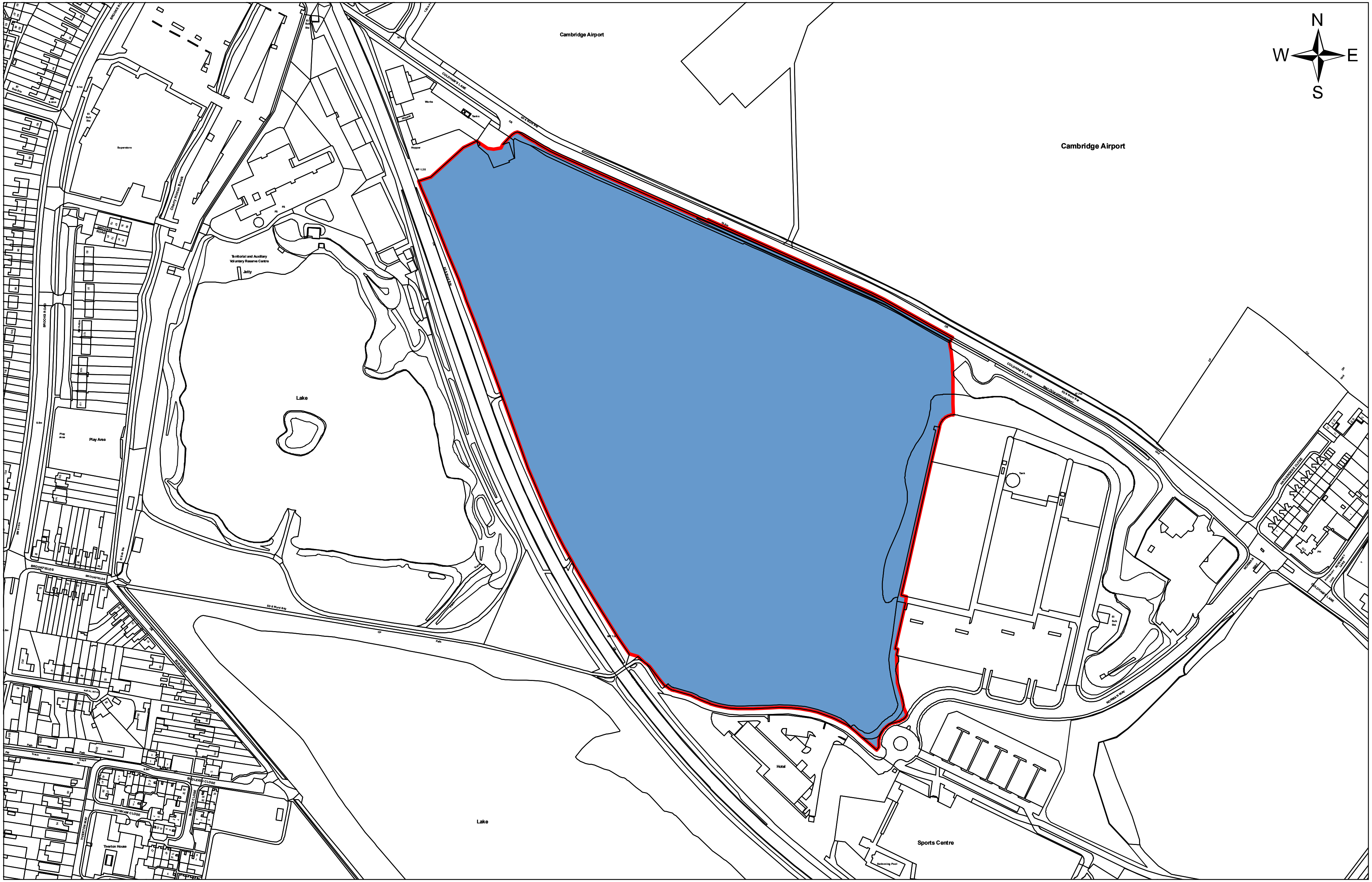
Section/Department: Policy & Projects, Environment & Planning

Scale: 1:9,000



Map 14:Coldhams Land (landfill)

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Date: 22/05/08

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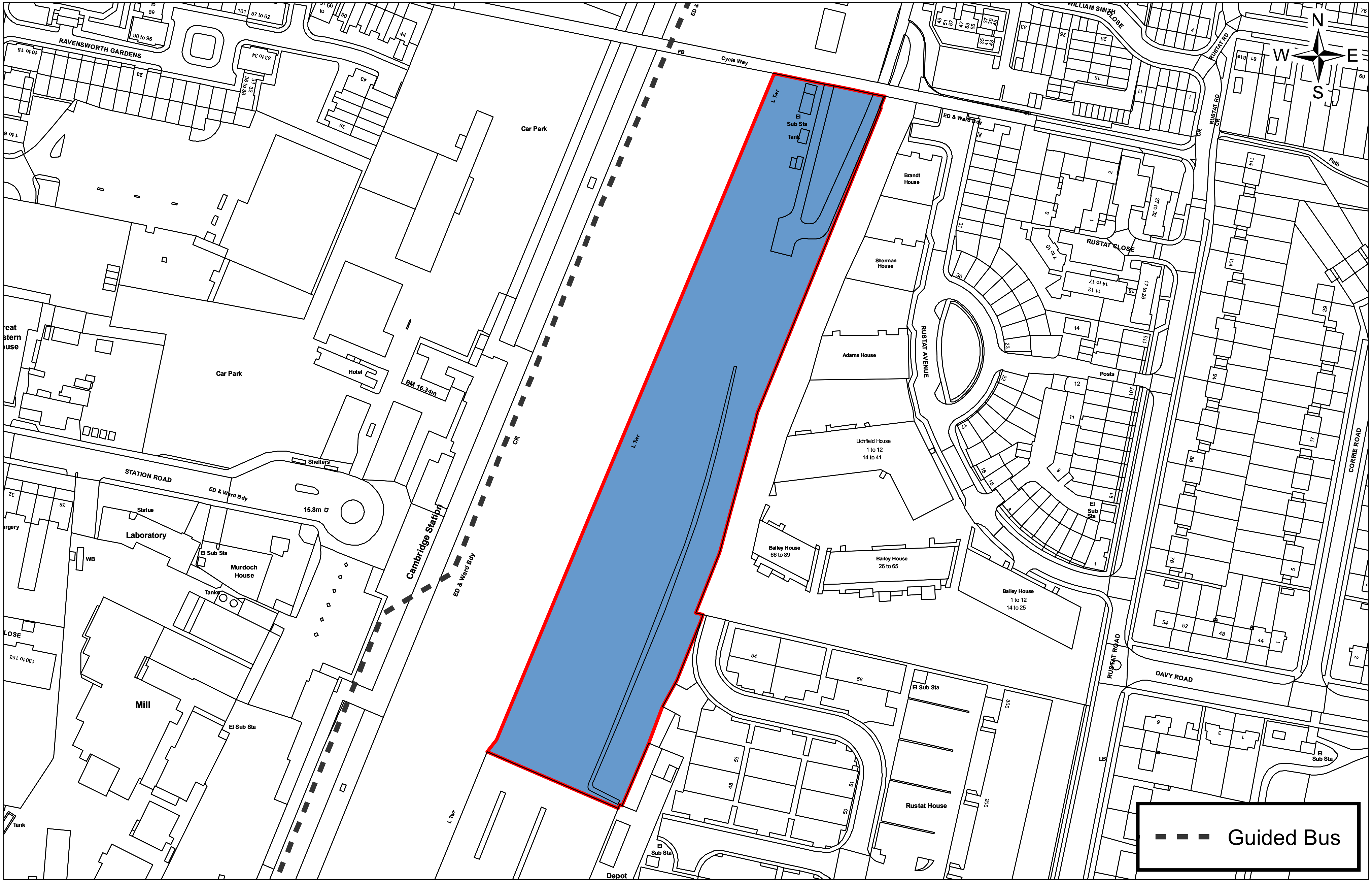
Section/Department: Policy & Projects, Environment & Planning

Scale: 1:4,000



Map 15: Rail Side, Rustat Road

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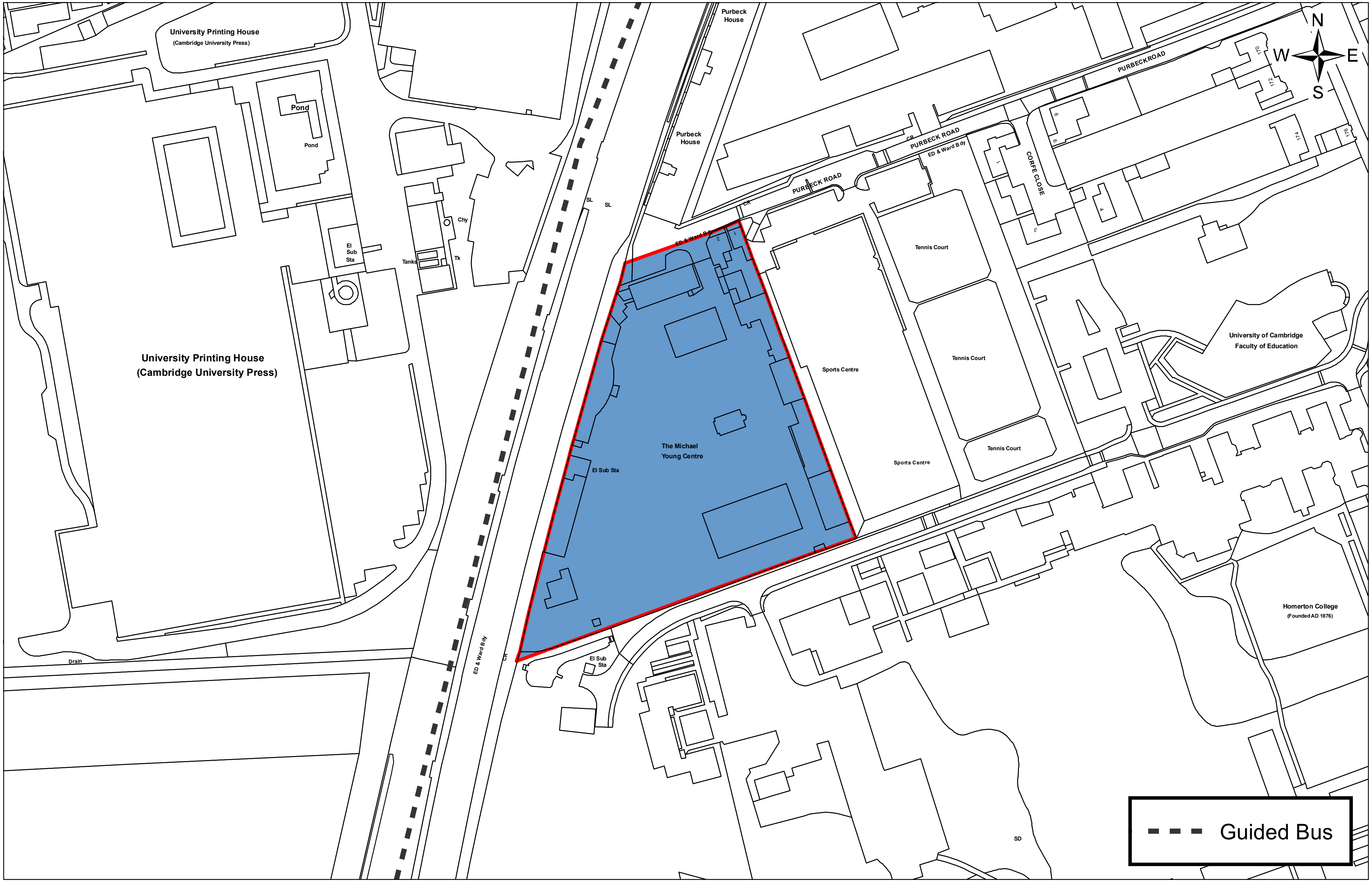
Scale: 1:2,000



Map 16: Michael Young Centre

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Date: 22/05/08

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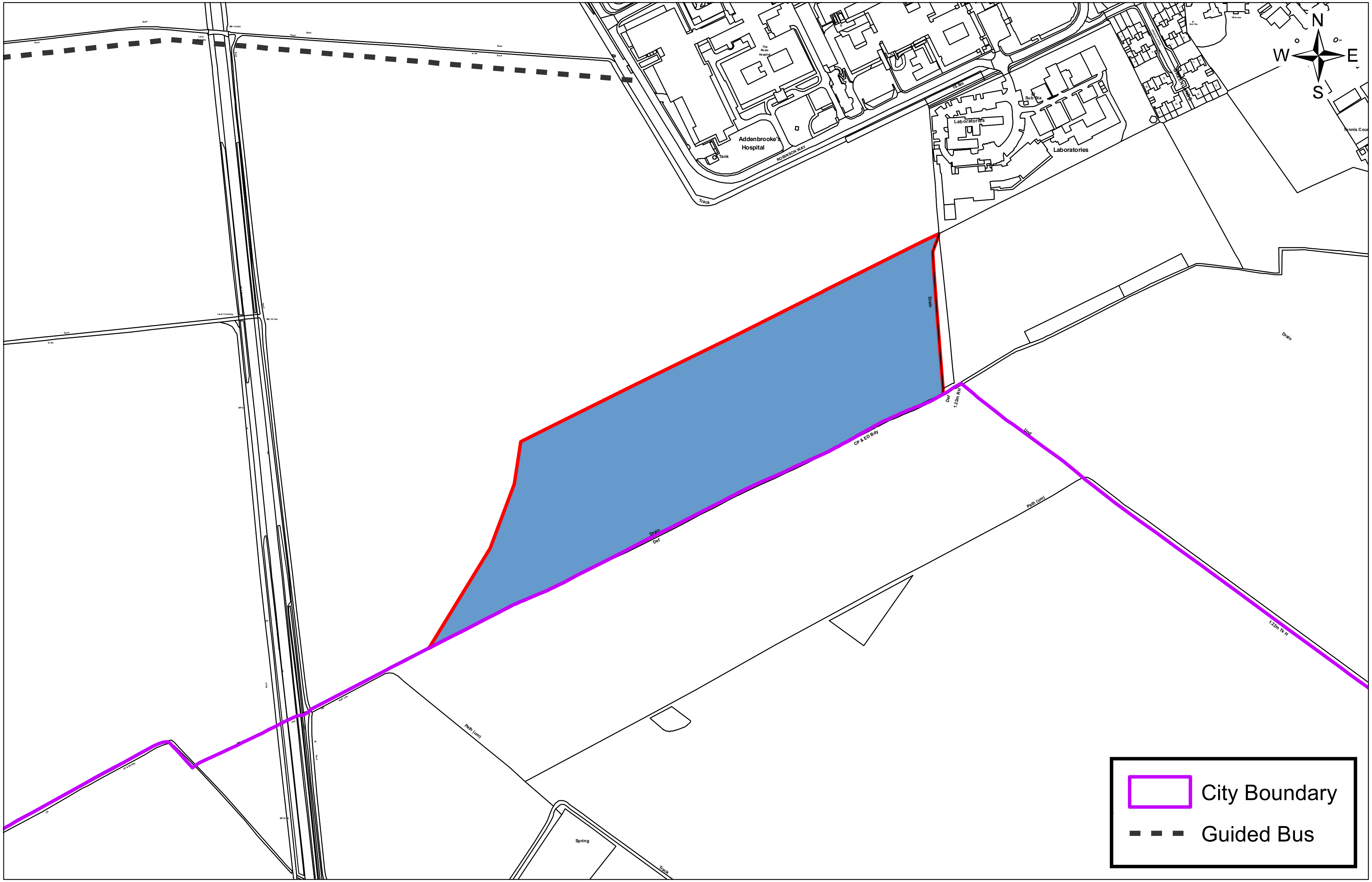
Scale: 1:2,000



Map 17: Addenbrookes Bio Medical Campus

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Section/Department: Policy & Projects, Environment & Planning

Scale: 1:5,000