

Matter 4

CCC 5102/SCDC 20801



LOCAL PLAN EXAMINATION

CAMBRIDGE CITY AND SOUTH CAMBRIDGESHIRE

MATTER 4

EMPLOYMENT AND RETAIL

on behalf of

PIGEON LAND AND LANDS IMPROVEMENT HOLDINGS

1 INTRODUCTION

- 1.1 The following statement is prepared on behalf of Pigeon Land and Lands Improvement Holdings. It should be read in conjunction with previously submitted representations (ref: CCC 5102/SCD 20801 Planning Report and Employment Review Sept 2013) and three attached appendices.
- 1.2 **Appendix 1: Business Needs of the R&D Sector in Cambridge.** This updates the explanation of the importance of Cambridge in the global marketplace (paras 3.1- 3.11 Planning Report), the 'open innovation' approach to research and product development (paras 3.12- 3.14 Planning Report) and stresses with reference to recent activity in the Cambridge R&D sector the importance of R&D organisations being closely co-located with other similar organisations within the 'heart' of the cluster ('Urban Area') (Appendix 1 and 2). The Appendix also contains a number of letters received from leading organisations in the R&D sector in Cambridge expressing concern about the need to maintain an adequate supply of suitable land.
- 1.3 **Appendix 2: Update Assessment of Market Signals for R&D in Cambridge.** This provides the detail of current market signals in the sector as they respond to business needs and explains the substantial increase in demand levels and take up of the existing and allocated supply of suitable land in the 'Urban Area' .
- 1.4 **Appendix 3: Update Economic Development Needs Assessment.** This explains the methodology to meet the requirements of Planning Practice Guidance and industry best practice. It concludes a forecast requirement for floorspace and land close to the lowest figure in the range indicated by historical market data in Appendix 2. This is substantially above the requirement identified in the Local Plans and substantially below the entirely reasonable scenario of growth indicated by the projected data of market signals (Fig2).

2 EXECUTIVE SUMMARY

- 2.1 Due to flaws in modelling and a limited understanding of business needs, the Plan fails to properly assess the requirement for jobs in the R&D sector and substantially under-estimates the potential R&D employment potential.
- 2.2 The Plans rely too heavily on trend-based employment forecast modelling which is blind to recent changes in the economic environment, market activity and business needs.
- 2.3 The Local Plans' evidence base fails to meet the requirements of 14 essential points of PPG.
- 2.4 Due to the under-estimate of R&D jobs and a lack of up-to-date understanding of business needs and market signals, the Plans severely under-estimate both the quantitative and qualitative need for new R&D employment land suitably located in the 'Urban Area'.

2.5 The impact of this lack of suitable land will condemn Cambridge to an almost immediate and damaging 'brake' on the attraction of new R&D activity, entirely contrary to the aims of the NPPF, the stated Local Plan strategies and PPG.

What Part of the Local Plans are Unsound?

2.6 Both Plans are unsound in the parts which:

- select a strategy to disperse the majority of employment sites, particularly that related to the R&D sector, to beyond the reasonable alternative and more sustainable fringe of Cambridge;
- under-estimate the land requirements for new R&D sector development;
- fail to allocate sufficient suitable and available land in the heart of the Cambridge cluster where the sector businesses and organisations require to be located to meet their business needs.

What Soundness Criterion Do the Plans Fail and Why?

Positively Prepared

2.7 The Plans' assessment of forecast growth in net additional jobs, floorspace and land requirements in the R&D sector is not based on a clear and up-to-date understanding of business needs (Appendix 1), a robust evidence base in compliance with best practice, Planning Practice Guidance and an understanding of market dynamics (Appendix 3), including clear market signals (Appendix 2).

Justified

2.8 The Plans' allocations for strategic employment sites, particularly for the R&D sector will not achieve the Councils' own economic strategy and vision (RD/Sub/C/010 page 11 and Policies S/1 and S/2 RD/Sub/SC/10). The limited availability of suitable employment sites within the heart of the Cambridge R&D cluster and the chosen strategy to provide the principal stock of employment sites outside the heart of the cluster does not represent the most appropriate strategy, when considered against the reasonable alternative of providing sufficient site(s) on the economically more sustainable city fringe.

Effective

2.9 As a consequence of the under-estimate of forecast requirements and the lack of land allocations in the heart of the cluster, where demand for growth is concentrated, the Plans will fail to deliver the necessary job growth, the potential value of the Cambridge R&D sector and the aims of the economic strategy and vision both within the Plan period as a whole and in the immediate early years of the Plan period. The consequent shortage of suitable available land is so acute that Cambridge will be immediately prevented from attracting inward investment in the new emerging and expanding R&D sector.

2.10 **Consistent with national policy**

The Plans do not enable the delivery of sustainable economic development in accordance with the policies in the Framework. The Government is committed to building a strong, competitive economy. To do so, it is essential that centres of growth able to attract inward investment such as Cambridge offer the necessary positive encouragement, appropriate strategic sites, support and flexibility.

2.11 By not understanding the business needs (Appendix 1) and market signals (Appendix 2) of the R&D sector and by miscalculating the R&D sector contribution to the total jobs target (Appendix 3), the plans, as required by the Framework paragraph 21, fail to:

- positively and proactively encourage sustainable economic growth;
- identify suitable and available strategic sites for local and inward investment sufficient to match the strategy and to meet anticipated needs over the Plan period;
- support existing business (particularly the R&D sector), identify and plan for new emerging sectors likely to locate in the area (particularly the relatively new but fast and hugely expanding life sciences R&D sector);
- incorporate policies flexible enough to accommodate needs not fully anticipated in the Plan (exemplified by the fast and recent growth of life sciences) and to allow a rapid response to changing economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- be aspirational but realistic.

2.12 The Framework requirements are set against general Government policies which identify the R&D sector as a specific target to meet market-led demand.

How Can the Plan be Made Sound?

2.13 The evidence base of the Plans is so flawed that we doubt the Plans can be found sound without a major overhaul of the evidence including:

- the inclusion of a clearer understanding of the business needs of the R&D sector including reference to the 'open innovation' agenda and the need for the R&D sector to be concentrated within the heart of the Cambridge R&D cluster within or immediately adjacent to the City;
- the inclusion of appropriate market signals and an appropriate methodology for calculating job and employment land requirements to meet the needs of the R&D sector;

- the proper assessment of development land opportunities within the immediate Cambridge fringe as a reasonable and more sustainable alternative to the strategy of dispersing development where inward investment interest is likely to be limited.
- 2.14 As a result of the revised evidence base any new Plans will need to consider allocating suitable individual site(s) for the R&D sector adjacent to the existing city 'Urban Area' and available in the early part of the Plan period.

3 ISSUE A

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

- 3.1 We raise no challenge to the current total forecast number of jobs in the Plans although we believe that flaws in the assessment methodology render the conclusions on forecast jobs for the R&D sector a severe under-estimate. In addition, the Plans are not sufficiently flexible to ensure there remains adequate land to accommodate changing needs and to allow a rapid response to economic demands. The assessment methodology fails to:
- understand the current business needs of the R&D sector (Appendix 1);
 - understand the current market signals relevant to the R&D sector (Appendix 2);
 - use consistent forecast data or even forecasting models in Cambridge and South Cambridgeshire (Appendix 3).
- 3.2 Identification of sufficient R&D floorspace and land requirements are consequently dramatically under-estimated. This is discussed in Matter 4c.

Understanding Business Needs of the R&D Sector

- 3.3 The Plans have failed to take account of the experience of Cambridge's attraction and relatively new emphasis on the 'open innovation' approach in the operation of the R&D sector. Not the only, but the most recent and perhaps most notable example of the approach as it applies to Cambridge has emerged since the Plans' evidence base was prepared. AstraZeneca's announcement of a relocation of its HQ (2,000 employees) to the Cambridge Bio-medical Campus reinforces the substantial impact the 'open innovation' approach is having on Cambridge's R&D sector. The immediate further interest and commitment from other companies and organisations preparing to develop new operations on the immediately adjacent land at CBC and the allocated CBC Phase 2 is testament to the impact of the approach (Appendix 2 para 4.6).

3.4 The evidence of increased business need and market demand and commitment from organisations in the sector emphasises the need for the Plans to be optimistic about the number of R&D sector jobs likely to be attracted to Cambridge ‘Urban Area’ in the Plan period. With just AstraZeneca and ARM a total of 3,500 jobs from the Council’s forecast of 6,800 Plan period R&D jobs are already committed. The answer is not to restrict opportunity it is to embrace it and as stated in para 154 of the NPPF “be aspirational but realistic”.

Current Market Signals

3.5 As detailed in Appendix 2, current market signals clearly demonstrate the attraction of Cambridge to the R&D sector. This lends further weight to the optimism that forecast job growth is likely to exceed not only the Local Plans’ evidence base forecast but also any corrected trend-based forecast model.

Corrections to Methodology Flaws

3.6 Fig 1 captures, in the same format as displayed in the Councils’ Employment Topic Paper (RD/Top/020), the differences between the Councils’ modelled forecast and our own, together with the consequences for floorspace and land requirements.

3.7 In the modelling of forecast job requirements, the two Councils have failed to use the same models and input data, despite the accepted common functional economic area. In the case of SCDC the Plan has failed to use up-to-date SICs.

3.8 The conversion of jobs to the requirement of floorspace and land is discussed in Matter 4c below.

Figure 1. Comparison of Local Plan and updated Warwick Revised ELR Calculations.

Source		Cambridge Jobs Growth Range ('000) SHMA EEFM	Net Floorspace Forecast ('000sqm GEA) Range	Land Requirement (hectares)	South Cambs Jobs Growth Range ('000) EEFM	Net Floorspace Forecast ('000sqm GEA) Range	Land Requirement
Local Plan Evidence ^{*1}	R&D B1(b)	2.7	32.7	4.8	4.1-4.1	50-50	15.2-15.3
Warwick Revised ELR	R&D B1(b)	2.7	54.2	8.4	8.9	176.6	53.8
	Buffer		10.8	1.68		35.2	10.76
	Total		65.0	10.08		211.8	64.56

*1 Source: ELR Review Update 2012 Tables 2.4 and 2.7. Cambridge City ELR Update: Addendum May 2013 Table 2 to 4.

3.9 The detailed explanation of these calculations is contained in paras of Appendix 3.

4 ISSUE B

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

The evidence base supporting the employment policies falls well short of meeting the requirements of Planning Practice Guidance.

4.1 The relevant paragraphs of the Guidance seek to assist in ensuring that Local Plans meet the tests of soundness laid out in the Framework and that the assessments of employment land requirements conclude on the levels of quantitative and qualitative predicted need so as to input clearly into the suitability of site allocations (ID:2a-035-20140306).

4.2 The evidence base fails to meet the requirements of the guidance by not:

- objectively assessing need (ID:2a-001-20140306);
- adequately identifying the quantitative and qualitative needs for new development (ID:2a-002-20140306);
- providing an appropriate breakdown of need in terms of quality and location (ID:2a-002-20140306);
- addressing the quantity of economic development floorspace needed based on an understanding of the qualitative requirements of each market segment (ID:2a-003-201403306);
- considering scenarios that could be reasonably expected to occur (ID:2a-003-201403306);
- using a largely standard and appropriate methodology (ID:2a-005-20140306);
- adequately identifying all economic development segments in recognition that different segments may have different requirements (ID:2a-008-20140306);
- understanding recent patterns of employment land supply, market intelligence, market signals, particularly recent take up rates, the locational and premises requirements of particular types of businesses and physical and ownership constraints (ID:2a-030-20140306);
- properly analysing recent take-up, projections based on past trends and forecasts based on future scenarios and occurrences for specialist economic uses (ID:2a-031-20140306);
- adequately considering the particular characteristics (e.g. footprint and proximity to infrastructure) broken down by economic sectors (ID:2a-032-20140306);
- taking account of business cycles to assess employment land requirements (ID:2a-032-20140306);

- adequately considering sectoral and employment forecasts and projections and consulting with relevant organisations, studies of business trends and monitoring business, economic and employment statistics (ID:2a-032-20140306);
- adequately recognising the increasing diversity of employment generating uses (ID:2a-033-20140306);
- taking account of four key quantified relationships in assessing employment land requirements (ID:2a-034-20140306).

5 ISSUE C

Will the proposed amounts of land for economic development uses meet the needs for all types of economic development?

Floorspace and Land Requirements

- 5.1 Fig 1 details how the corrected trend-base forecast employment in R&D jobs would increase the requirements for additional floorspace and land.
- 5.2 This applies the correct key relationships in assessing employment land requirements contained in PPG (ID: 2a-034-20140306):
- appropriate and up-to-date SICs;
 - necessary conversion rates to full-time equivalent jobs;
 - conversion ratios for R&D employment;
 - full-time employment to floorspace (employment densities).
- 5.3 Appendix 3 also explains the need to insert a reasonable 'buffer' in the assessment of land requirements to ensure a sufficiently flexible supply. This is entirely in line with industry best practice.
- 5.4 This demonstrates a substantial under-estimate of forecast floorspace and land requirement in the Local Plans for the B1(b) sector
- 5.5 An application of the entirely reasonable prospect already heralded by an understanding of business needs and market indicators (both historic and projected data) increases the requirements again substantially.

Fig 2. Business Needs and Market Signalled Forecasts(B1(b))

	ELR (2012) (2011-2031)		Warwick ELR (2011-2031)		Market Indicators (Historic Data) (2014-2031)		Market Indicators (Projected Data) (2014-2031)	
	Sq m	Land (ha)	Sq m	Land (ha)	Sq m	Land (ha)	Sq m	Land (ha)
Urban Area	73,800	10.8-22.5	248,400	36.5-75.7	297,370	44-91	489,150	72-149
Out of Town	8,200	2.5	27,800	8.5	33,040	10	54,345	17
Total	82,000	13.3-25	276,200	45-84.2	330,410	54-101	543,495	89-166

5.6 The explanation of these market signals is contained in Appendix 2.

5.7 Fig 2 separates the requirements between the 'Urban Area', 'Out of Town' and the market experience in Appendix 2. The business sense and market facts of this is explained in Appendices 1 and 2. In the conversion of floorspace to land requirements we have applied the same plot ratios as detailed in the Councils' evidence base for Cambridge City and South Cambs (RD/E/20 page 10 Table 2.5). The 'Urban Area' is expressed as a range because part is in Cambridge City and part in South Cambs.

Floorspace and Land Supply

5.8 An assessment of existing and allocated floorspace and land supply is identified in Fig 3. It is essential to again separate this into 'Urban Area' and 'Out of Town' and also to identify what is available and open to the general market place sufficient to attract the full range of users and be immediately available (Appendix 2). The shortfall is clear. With a range of forecast requirements for the 'Urban Area' of 248,400-489,150 sq m, only sufficient land for 149,500 sq m is available.

Fig 3. B1(b) Available Supply 2014-2031

	Open/Available sq m	Restricted/Unavailable sq m	Total sq m
Urban Area	149,500	293,000	442,500
Out of Town	100,000	58,000	158,000
Tota	249,500	351,000	600,500

- 5.9 Para 8.5 and 8.6 of Appendix 2 explain that based on historic take up rates for B1(a) and B1(b), there is 7 years available building and land supply in the Outer Cambridge area but only 4.25 years in the 'Urban Area' as required by the identified business needs. The entirely reasonable prospect of projected take up rates would leave only a 4.25 year supply in Outer Cambridge and 2.7 years in the required 'Urban Area'.
- 5.10 The final assessment explained in Appendix 2 includes B1(a) requirements and supply to ensure that we measure the potential of some B1(b) uses being accommodated in B1(a) buildings.
- 5.11 The paucity of open and available land supply in the 'Urban Area' contended by the Councils to be sufficient for the Plan period to 2031 is shown and exposed by the above and in the plans accompanying Appendix 2.
- 5.12 The shortage of supply is immediate and if not 'repaired' now as part of the current Local Plan process will stop Cambridge delivering the necessary R&D boost to the sector and the UK economy. Such an outcome would be entirely contrary to the Framework and to Government policies designed to encourage activity in those sectors with greatest economic potential.
- 5.13 Awaiting a review of the submitted Plans commencing in 2019 with adoption in perhaps 2021 will not resolve the immediate and short-term shortage and its consequences.

Matter 4 Appendix 1

Business Needs of the R&D Sector in Cambridge

October 2014



creativeplaces

Business environments that enhance innovation

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1 Introduction

- 1.1 This report is written to provide background information on the Research and Development (R&D) market segment and its potential business and property needs into the future within the Cambridge Sub-Region.
- 1.2 Creative Places is a niche property consultancy focused on the research and commercial R&D sectors, working throughout the UK and aware of market trends internationally. We are active members of the UK Science Parks Association and are closely involved with the International Association of Science Parks and Areas of Innovation – speaking regularly at their conferences, not just attending them. We travel internationally to keep abreast of market trends and to see how globally significant locations such as Boston, US and Beijing, China, are evolving their property offerings to the sector.
- 1.3 Creative Places' clients include the University of Cambridge, Imperial College London, the University of Edinburgh and Warwick University, as well as the Technology Strategy Board and subsidiary organisations to the Biotechnology and Biological Sciences Research Council.
- 1.4 Creative Places' staff have been active in the Cambridge sub-region, where we are based, for over 20 years; projects that we have had direct experience of working on include Cambridge Science Park, St John's Innovation Park, West Cambridge, Cambridge Biomedical Campus, Granta Park and Babraham Research Campus, as well as more conventional office and workshop properties throughout the city and further afield.
- 1.5 This report identifies the following key issues:
- Open Innovation has become the 'best practice' approach to product and service development for R&D intensive businesses over the last ten years and Cambridge has become a global magnet for this activity, because of the opportunity to work alongside such outstanding research and R&D activity.
 - Over the last 3 to 4 years the majority of businesses wanting to come to Cambridge to pursue an Open Innovation business model have focused their endeavours on a location within the heart of the cluster, within the built up area of Cambridge.
 - The growing life sciences sector in Cambridge is focused on the south side of the city and the success of Cambridge Biomedical Campus means that there is now a call from many significant stakeholders for further allocation of development to help balance demand and supply in the short to medium term, not just the longer term.
 - Planning for Cambridge research/R&D growth is of critical importance to Cambridge University and the wider UK and European economies.

2 Global Trends in R&D

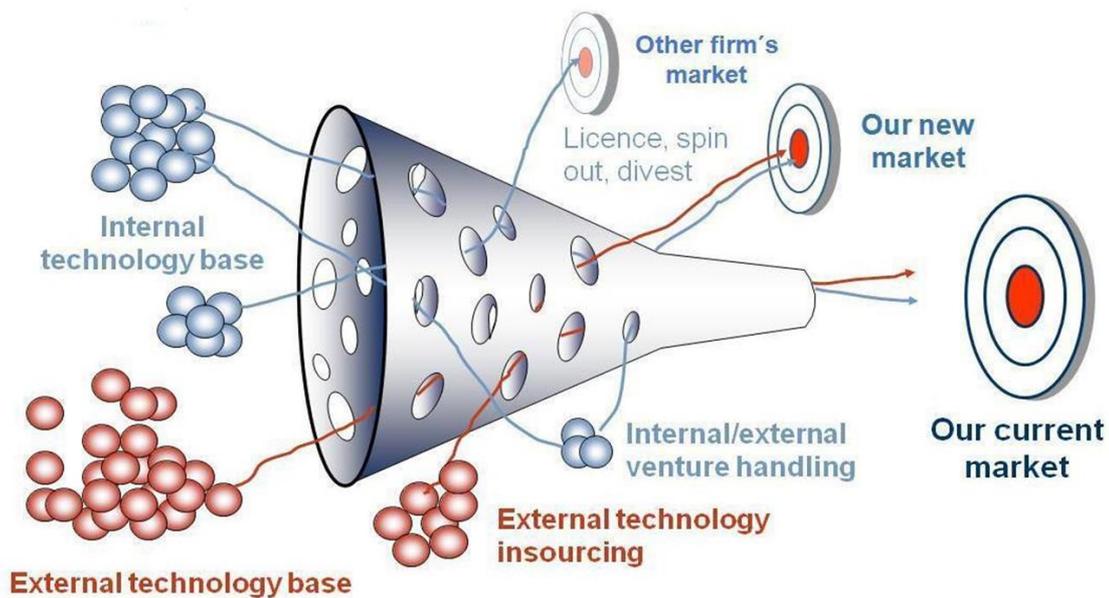
- 2.1 Investment in commercial R&D is growing significantly, globally. The world's top 2,000 companies involved in the activity increased spend on R&D in 2012 by 6.2% and this follows annual increases since a 'one year only' reduction that followed the 2008 world economy crash¹.
- 2.2 Whilst total business R&D expenditure in the UK decreased by 2% to £17.1 billion in 2012, showing that the UK as a whole is having to work hard to compete for global spend on R&D, there are 'R&D hotspots' within the UK where businesses from around the globe are attracted. The 2012 UK reduction was most significantly caused by a dramatic decrease in expenditure in pharmaceuticals R&D, witnessing a reduction by £727 million², and evidenced by pharmaceutical companies closing down relatively isolated R&D plants. In recent years losses have been suffered at places like Sandwich in Kent (Pfizer), Horsham in Sussex (Novartis), Harlow in Essex (GSK), Welwyn Garden City in Hertfordshire (Roche), Newhouse in Lanarkshire (Merck), Loughborough in Leicestershire (AZ) and Alderley Edge near Manchester (AZ). The 2012 reduction in UK business spend on R&D masks trends operating at business, sectoral and geographical level that are of great relevance. Policy makers and the property industry need to look closely at where market demand is now focussed.
- 2.3 Within the R&D sector places like Cambridge are seeing significant increases in R&D expenditure and indeed Cambridge is becoming hugely significant at a UK, European and global level, because of its very strong research base and outstanding representation of business R&D activity – which businesses are attracted to. At the same time as closing the R&D facility at Sandwich Pfizer set up a team of people in the Cambridge sub-region at Granta Park, in 2008, to focus on regenerative medicine. By 2011 they had grown the operation to the point that a new company was set up, Neusentis, specialising in pain and sensory disorders, as well as regenerative medicine – taking additional accommodation.
- 2.4 We expect this polarisation to places like Cambridge to continue and what we have witnessed over the last 3 to 5 years is that most R&D intensive businesses are now wanting to focus even more strongly on being right in the heart of the cluster, within built-up Cambridge or at a specialist research centre like Babraham. On the ground evidence of take up and the needs that we see for further development to satisfy end user demand supports this.

¹ EU Industrial R&D Investment Scoreboard, 2013

² ONS, Business Enterprise R&D, 2012

- 2.5 To understand what is happening at country and regional/city level one needs to look at the business model now being adopted by most companies to develop their products and services through evolving technologies. At least 70 percent of businesses now endeavour to use Open Innovation³. This entails the use of purposeful inflows and outflows of knowledge to accelerate internal innovation and expand the markets for external use of a firm's innovation. Henry Chesbrough first identified it back in 2003, and shows it diagrammatically as follows:

2.6



- 2.7 This approach involves technology-based businesses working closely with others to ensure that they develop products faster and cheaper using external ideas and resources as best they can, whilst exploiting their technology through agreements with others. To do this they are attracted to places that have intensity of activity that is relevant to their work.
- 2.8 By international standards the UK has a relatively high share (circa 50%) of its business enterprise R&D expenditure carried out by foreign owned businesses⁴. The EU plays a major role in Greenfield Foreign Direct Investment in relation to R&D. 22% of global landings in 2012 were in the EU and in terms of destination country for R&D investment the UK is the only European country that features in the top 10 countries

³ Open Innovation Survey, Prof. H. Chesbrough, 2012

⁴ ONS Business Enterprise R&D, 2012

of the world, securing 817 projects in the period 2003 to 2012, worth 29 billion euros and creating 95,000 jobs⁵.

⁵ EU Industrial R&D Investment Scoreboard, 2013

3 EU and UK Government ambitions for R&D

- 3.1 In December 2011 Henry Chesbrough authored a paper, in collaboration with others, entitled *Open Innovation and Public Policy in Europe*. In it he identified that knowledge is now distributed across the landscape and companies need to find it from customers, suppliers, universities, national laboratories, consortia, consultants and emerging start-ups. He suggested that they need to structure themselves to leverage these distributed pools. Policy makers, at the same time, have to shift their support from single firms to the innovation ecosystem that is creating and commercialising technologies. They have to look at the different nodes in the 'food chain,' from science to commercially viable product introductions. Innovation policy, he suggests, can play a crucial role in stimulating innovation systems in which universities, labs, start-ups, and large companies jointly create new market opportunities. The locus of innovation is no longer in the firm but in the network (Powell et al, 1997).
- 3.2 The principal recommendation of the report relates to education and human capital development. It advises that The EU is fortunate to have tremendous human capital resources at its disposal. However, there are too many research programmes within the EU that sprinkle money across all the member states, with insufficient competition for these resources. The result is politically popular; but economically, the funded programmes lack the excellence and scale to produce world-class research and technology. Research funding competitions should move to the EU-level wherever possible, to reward excellence and promote the promising ideas of new scholars. The European Research Council is a good step forward – and should be enlarged, it recommends.
- 3.3 The European Union Open Innovation Strategy and Policy Group (OISPG) has published annual yearbooks that document and summarise innovation practices in Europe. In past years they have reported that we are witnessing a new level of openness with increased sophistication and complexity associated with innovation.
- 3.4 An outcome of their 2013 conference was a white paper "Open Innovation 2.0: A New Paradigm". In it Justin Rattner, Intel Chief Technology Officer, evangelizes the concept of 21st century industrial research characterized by visioning, inventing, validating and venturing. It suggests that instead of innovation being driven a brilliant individual researcher, innovation success will be driven by teams of boundary spanners that possess multidisciplinary skills.
- 3.5 For OISPG, the OI2 paradigm is an innovation model based on extensive networking and co-creative collaboration between all actors in society, spanning organizational boundaries well beyond normal licensing and collaboration schemes. With OI2, sharing and the co-generation of innovation options will enable a significant competitive advantage and will help achieve broader scale innovation benefits for larger numbers

of stakeholders. In OI2 there is also a cultural shift away from resisting change and toward innovation and the creation of shared value.

- 3.6 OISPG's observations include a view that we are witnessing a strategic inflection point in the practice and impact of innovation. OI2 is enabled by the collision of three mega trends - digitization, mass collaboration, and sustainability. Across the world, Moore's law is colliding with virtually every domain. Industries that have taken centuries to mature have been dramatically reshaped in less than a decade (e.g. music, books). Many more industries are ready for this transformation.
- 3.7 Through improved and more extensive networking, OI2 focuses on creating increased social capital, enabling broader boundary spanning and the creation of new activation triggers for innovation options.
- 3.8 Cultivating and orchestrating innovation ecosystems are important parts of OI2. It is increasingly clear, they suggest, that innovation ecosystems can be created and transformed by creating a shared vision and reinforcing the vision with active social network management and orchestration (Russell et al, 2011). Russell et al describe innovation ecosystems as "the interorganizational, political, economic, environmental, and technological systems of innovation through which a milieu conducive to business growth is catalysed, sustained and supported." George Osborne, UK Chancellor, has recently stated that "You get innovation when great universities, leading-edge science, world-class companies, and entrepreneurial start-ups come together. Where they cluster together you get some of the most exciting places on the planet. That is where you find the creative ferment which drives a modern dynamic economy."

European Commission Open Innovation Study 2012 by Bror Salmelin

- 3.9 This paper confirms that we are seeing open innovation increasingly based on a 'triple helix' arrangement of industry, government and university interaction. The impact of this collaborative innovation goes well beyond the scope of what any organisation could achieve on its own.
- 3.10 The paper suggests that in the 21st century, mastery of and improving productivity of knowledge assets will be at least as important as mastery and improvement of physical assets and resources. There is a growing case for specific focus on, and enablement of, open innovation. The existing seventh framework programmes and the future Horizon 2020 programme are seen as key supporting mechanisms.
- 3.11 The paper suggests that regions should be turned into innovation platforms for strategic change. They need to be enabled and empowered to become the new 'republics of tomorrow' — knowledge-fuelled, future-centred drivers of innovation, providing processes and tools for government and business, products, services and new jobs for citizens, with an impact felt from the new dynamic understanding of regional innovation ecosystems, where public, private and the third sector learn to operate together, instilling a new and creative mood in society. All across Europe

good experience has been gained in the new open research, development and innovation platforms and methodologies that mobilise public-private partnerships and encourage the participation of people. The ongoing changes are already taking hold: in the future, they will have an enormous impact on everything. The critical governance level of Europe 2020 actions needed is local and regional: municipalities, together with regional decision-makers, are the ones to make the Europe 2020 a reality.

EU Horizon 2020 Programme

- 3.12 Horizon 2020 is the biggest EU Research and Innovation programme ever, with nearly €80 billion of funding available in the period 2014 to 2020.
- 3.13 Horizon 2020 is the financial instrument implementing the Innovation Union, a Europe 2020 flagship initiative aimed at securing Europe's global competitiveness. Seen as a means to drive economic growth and create jobs, Horizon 2020 has the political backing of Europe's leaders and the Members of the European Parliament. They agreed that research is an investment in our future and so put it at the heart of the EU's blueprint for smart, sustainable and inclusive growth and jobs.
- 3.14 By coupling research and innovation, Horizon 2020 is helping to achieve this with its emphasis on excellent science, industrial leadership and tackling societal challenges. The goal is to ensure Europe produces world-class science, removes barriers to innovation and makes it easier for the public and private sectors to work together in delivering innovation.

The UK Wilson Review of UK Business-University Collaboration, 2012

- 3.15 This reported that improvements over the last 10 years have largely been due to a cultural change from both firms and universities towards open innovation and in particular the role of universities in providing high level skills and world class research. Wilson advised that this change can also be attributed to the change of funding models that universities have undertaken over this period alongside wider government policies aimed to support collaborations. The shift has encouraged universities away from attempts to make professors 'commercially-minded', towards supporting the links that exist and improving the benefits of them.
- 3.16 The Wilson review also considered the specific needs of SMEs. It found that networking between universities and the business community is a critical component of an efficient innovation ecosystem, especially for highlighting opportunities in the SME sector to graduates.

UK Government response to the Wilson Review

- 3.17 The Government responded by creating the National Centre for Universities and Business (NCUB) which aims to strengthen collaboration between the UK's higher education and business sectors. The ongoing BIS Select committee is also evaluating the funding processes of collaboration and its role in local growth.

Witty Review of Universities and Growth, 2013

- 3.18 This report supports the drive to 'commercialise' research outlined in the Government's Industrial Strategy proposals. It supports greater collaboration between universities and SMEs, advocating "an enhanced third mission" for universities alongside research and education — to facilitate economic growth.
- 3.19 The review sets out a key role for Local Enterprise Partnerships (LEPs) as well as cities in helping build networks and disseminate funding to support these collaborations. It also makes a headline proposal for a £1 billion fund over the life of the next Parliament for 'Arrow Projects,' bringing together LEPs, universities and industrial and supply-chain partners to develop "new technologies through mobilising national clusters in fields offering significant international markets."

UK Government Response to Witty Review post 2013

- 3.20 The BIS response agreed that LEPs should put universities at the heart of their thinking and decision-making and should direct a large share of the £1 billion of European Structural and Investment Funds to universities.

Further, the Government has committed to a new Advisory Hub for Smart Specialisation along the EU concept of identifying regions' comparative advantages and promoting diversified growth in the industries they are strong in.

4 Cambridge in a National/International Context

- 4.1 In terms of a place for research and commercial R&D activity Cambridge is truly unique within Europe. No other city has the combination of a University consistently ranked in the world's Top Ten⁶, a business sector totally dominated by commercial research and development activity⁷, and a relatively small population (circa 125,000). There is a breadth and depth of research and R&D activity here that is not found in any other UK city. It is this breadth and depth, so highly concentrated because of the size of Cambridge, that makes it such an exciting place to work from a business perspective - if you are involved with product and service development involving technology world leading science is relatively close at hand, often accessible through a friend of a friend. One can cycle within built up Cambridge to meet a world leader in almost every field of scientific research and the commercial R&D business community in the area is full of people that have got around problems this way and that, raised money, launched products overseas, floated businesses, etc. Peer to peer learning can be hugely valuable when doing things for the first time.
- 4.2 The dynamics of Cambridge means that its potential for economic growth is huge.

Cambridge resilience

- 4.3 Whilst potential vulnerability must exist with such a specific focus on one business area, the last forty years do not bear witness to volatility. Indeed quite the opposite, in economic downturns Cambridge has consistently proven to be hugely resilient.
- 4.4 During the significant recessions that followed economic downturns in 1990 and 2008 Cambridge fared relatively well. At Cambridge Science Park, for example, Trinity College has consistently enjoyed occupancy levels of over 90%.
- 4.5 Over the five year period 2008 to 2013 the level of commercial floor space take up relative to the size of the market has been higher in Cambridge than in any other city outside London.
- 4.6 A report by the UK Innovation Research Centre in 2012, titled 'The UK R&D Landscape', confirmed, however, a need to sustain the competitiveness of UK R&D in terms of both quantity and quality. The report's authors believe that the openness and quality of UK R&D to non-UK domiciled businesses is a major strength. 'It is most important that the conditions that attract those businesses, in particular the quality of university research and talent, is not undermined'. The UK has by international

⁶ Times Higher Education World University Rankings and QS World Rankings, 2010 to 2013 only shows Cambridge and Imperial College ranked in top 10 every year, globally, from within Europe

⁷ Centre for Cities research, 2013. 69 patents granted per 100,000 of population, equating to more than the next 5 UK cities combined

standards a relatively high share (over 40%) of its business enterprise R&D expenditure carried out by the subsidiaries of overseas firms. Whilst the share of total business R&D expenditure in the UK funded from overseas sources increased substantially during the 1990s. The share of overseas funding stopped rising after 2002. The share of R&D in the UK funded from abroad is now lower than it was in 2002. To the extent that overseas investment is seen as an indicator of the attraction of the UK as a location for R&D activity, this suggests that it could be a matter of some concern that the share has been falling in recent years.

5 Cambridge at a Sub-Regional Level

- 5.1 Cambridge has started to accelerate its engagement with multi-nationals wanting teams in what we would classify as 'Research/Commercial R&D Global Hot Spots'. Over the last year it has meant, for example, that Dyson have decided to put a team into a property they are commissioning on Trumpington Street, alongside Cambridge University's Engineering Department.
- 5.2 The Vice Chancellor of Cambridge University is fully committed to this agenda. In relation to Cambridge Biomedical Campus he has said "For companies seeking an environment where they can translate their research into clinical benefit and regularly interact with some of the world's most influential academics, there is no better place than the Cambridge Biomedical Campus".

Locational differentiation within the sub-region

- 5.3 For many years Local Authorities have pursued a dispersal policy that provided for business growth in Cambridge and in the wider sub-region.
- 5.4 The majority of R&D intensive businesses today want to locate within the built environment of Cambridge or at specific research-intensive locations such as Babraham Research Park and Hinxton's Genome Campus (both of which have very specific focus on discrete areas of work within the Life Sciences sector), still very close to Cambridge. Cambridge is the place with not just the University but the majority of businesses involved in research, R&D and R&D support activity. It is where a business can truly be part of the Cambridge community, at the heart of the cluster. It is the best place to undertake Open Innovation because of that integration into the community. A business taking space within built-up Cambridge plays to the other dynamic that is a recognised global trend – migration to the cities. R&D intensive businesses advise us that staff recruitment and retention is critical for their success and believe that the more central to Cambridge they are the easier this will be. Discussions with Microsoft and Citrix to explore the reasons for them wanting to move more centrally in recent years support this.
- 5.5 We are seeing quite a dramatic focus on development within the built environment of Cambridge as opposed to outside, for R&D, in recent years. We have consulted with Cambridge Network, an organisation formed by Cambridge University to work business in the sub-region, for the purposes of this study and enclose a letter from their CEO, Claire Ruskin, which sets out the thoughts that she has in relation to future needs. Whilst parts of the Cambridge regional cluster outside the built up area have a function they are different to the offering in the core.

South Cambridge

- 5.6 South Cambridge has become the established centre for the life sciences sector in the

Cambridge sub-region. It is where Addenbrooke's Hospital, the Cambridge University Medical School and a variety of research institutes are based at the Cambridge Biomedical Campus, it is home to the University's Forvie Laboratories and the Babraham Research Campus, the Wellcome Trust Hinxton Genome Campus and Granta Park – where tenant emphasis is on life sciences businesses.

5.7 Growth at Cambridge Biomedical Campus is nothing short of extraordinary over the last five years and what has happened merits specific mention for two principal reasons:

1. Growing clinical, research and commercial R&D cluster

The commitments made to take space here have involved Papworth Hospital planning to move to the Campus, the Medical Research Council building a new and much larger Laboratory of Molecular Biology and AZ deciding to relocate its global HQ to the site. It is truly growth of all three activities represented at the campus – clinical, research and commercial R&D.

2. Rate of take up of the land to be developed by commercial developers

Cambridge Medipark Limited now has all its land allocated under the current planning consent spoken for. From the allocation of 155,000 sq m for non-Addenbrooke's development the total floor space being progressed adds up to approximately 170,000 sq m, subject to planning consents being granted. 170,000 sq m is the equivalent floor space of Cambridge Science Park, which took 40 years to grow to this size. At CBC it has been committed to within 5 years of the 2009 planning permission. There is approximately 7 hectares of further land for development at Cambridge Biomedical Campus, in what will be Phase 2. This land is yet to receive any planning consent but is allocated for development. We understand that it is likely to deliver approximately 100,000 sq m of floor space, of which 33,000 sq m will be allocated to Addenbrooke's hospital for their own use. Thus only approximately 66,000 sq m of research/commercial R&D allocation may be expected here. From the average take up of circa 34,000 sq m per annum in this location this is only 2 years supply. Negotiations are taking place with prospective end users wanting to come to this land already.

5.8 There is going to be very little accommodation readily available in the south Cambridge area, very shortly. It is clearly woefully inadequate for a period through to 2031, for one of Cambridge's most buoyant sub-sectors, Life Sciences. We believe that the recent decision by AstraZeneca to relocate its HQ facility, combined with the expansion of Addenbrooke's Hospital, the recently committed to relocation of Papworth Hospital, and the completion of the new Laboratory of Molecular Biology by the MRC, all at the Cambridge Biomedical Campus, represents a 'game changer' in terms of step change for the sector, all on the south side of Cambridge.

5.9 There is substantial concern from key stakeholders in Cambridge about sufficient land

being allocated to meet business needs in relation to R&D activity. This is in the short term as well as in relation to the Plan period through to 2031. Letters from the following are attached, each telling their own story about need and why further allocation in this area is so vital:

- Addenbrooke's hospital, Chair and Chief Executive
- Medical Research Council, Director
- Cambridge Enterprise, CEO
- Cambridge Network, CEO
- Babraham BioScience Technologies, CEO
- AstraZeneca, Vice President and UK Footprint Lead

Jo Mills, Director of Planning and New Communities
South Cambridgeshire District Council
South Cambridgeshire Hall
Cambourne Business Park
Cambourne
Cambridge
CB23 6EA

12 May 2014

Dear Jo,

Cambridge and South Cambridgeshire Local Plan Reviews Cambridge South Project

AstraZeneca are a global, innovation-driven, biopharmaceutical company specialising in the discovery, development, manufacturing and marketing of prescription medicines that make a meaningful difference in healthcare. Last year we announced that we will establish a new global R&D centre in Cambridge, UK, by 2016. This includes an investment of around £330 million and underscores Cambridge's global importance as a location for biopharmaceutical research and development.

Cambridge offers invaluable access to world-leading scientific expertise and provides excellent opportunities for collaboration with renowned academic research institutions, pre-eminent hospitals and cutting-edge biotech companies. We hope our increased presence in Cambridge will help build the strength of the Cambridge bio-pharma community as a whole, enhancing the knowledge base and contributing to collective problem solving essential to the delivery of much-needed medical advances.

We have already started the transition Cambridge in advance of the main move in 2016, through the acquisition of temporary office accommodation in Melbourn and temporary laboratory space on the Cambridge Science Park. Through that exercise we have become aware of the lack of available commercial space within the Greater Cambridge area, particularly within walking or short cycling distance from our new facility at the biomedical campus.

The Cambridge South Project proposes the creation of a science park in close proximity to the biomedical campus. AstraZeneca supports the creation of this additional laboratory and commercial space, adjacent to the established concentration of medical and research institutes on the south side of Cambridge which first attracted us to the area. We believe it will provide a suitable environment to further enhance the biotechnology base which will drive the development of the innovative new technologies and drugs of the future.

Yours Faithfully,



Clive Morris
Vice President & UK Footprint Lead, AstraZeneca

Patsy Dell, Head of Planning Services
Cambridge City Council
The Guildhall
Market Square
Cambridge
CB2 3QJ

12 May 2014

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Clive Morris
Vice President & UK Footprint Lead, AstraZeneca



Patsy Dell, Head of Planning Services
Cambridge City Council
The Guildhall
Market Square
Cambridge
CB2 3QJ

12th May 2014

Dear Ms Dell,

Cambridge and South Cambridgeshire Local Plan Reviews

I write in relation to the ongoing success of the Babraham project and the growing need we are seeing for additional commercial R&D floor space in the sub-region.

For our life sciences sector the preference is for that accommodation to be relatively close to Cambridge and south of the river Cam. We are looking to do what we can to provide further space for businesses that want to be at Babraham Research Campus. For our facilities to function well and for our mission to be delivered, I believe that it is important for larger scale facilities to be provided not too far away. Although we already are aware of the facilities, and have good working relationships with, Granta Park, Great Chesterford, and The Wellcome Sanger, we do need further opportunities for businesses to 'grow on' elsewhere, once they reach a certain scale.

Accordingly we believe that it is important in the plan period 2011 to 2031 to provide opportunity for more development to serve the sciences sector on the south side of Cambridge. We would appreciate it if the Council can work to ensure that over this period there will not be an under-provision. Such a scenario could impact negatively on what we work so hard to build here at Babraham, and the opportunities for the region as a whole.

Yours Sincerely,


DEREK JONES
Chief Executive



Jo Mills, Director of Planning and New Communities
South Cambridgeshire District Council
South Cambridgeshire Hall
Cambourne Business Park
Cambourne
Cambridge
CB23 6EA

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Yours Sincerely,

A handwritten signature in black ink that reads 'Derek Jones'.

DEREK JONES
Chief Executive



Patsy Dell
Head of Planning Services
PO Box 700
Cambridge
CB1 0JH

11th September 2014

Dear Patsy

RE: Cambridge South Development

I am writing in respect of the proposals for the Cambridge South development.

Cambridge is Europe's leading technology cluster, with more than 1,500 high-tech companies based in the area. Together, these companies have an annual turnover in excess of £13 billion and employ more than 57,000 people.

The University of Cambridge is at the heart of the cluster – countless scientific advances have originated here, and our researchers and graduates continue to make important contributions to its economic success, by sharing their expertise, developing game-changing technologies or starting new companies in the region. At Cambridge Enterprise, we work with the University's researchers, inventors and entrepreneurs in order that their work can have meaningful economic and societal impact. Many of our industrial partners are located in the area, and we are keen to see University research exploited within the community, as well as throughout the world.

Our region is at the forefront of the UK's economic recovery, and universities such as Cambridge have an important economic role to play in that.

While we are rightly proud of Cambridge's position as one of the world's leading centres for innovation, we cannot ignore the fact that it is becoming more and more difficult for young companies to find space to establish themselves in and around Cambridge, potentially forcing them out of the area. Recent data from Bidwells indicates that currently available commercial laboratory space for example is just 18,000 sq ft - 1% of current demand. Availability of office space is little better at 13% of demand. This situation is making it virtually impossible for new companies to stay and grow within Cambridge.

In order to continue the growth of the cluster, both long- and short-term solutions to our infrastructure challenges must be found. Therefore we are keen to see the development of sites that can support the growth of innovation and its translation in the wider area beyond the city.



UNIVERSITY OF
CAMBRIDGE
enterprise

Of particular importance is the provision of innovation and incubator space in an around Cambridge. The low commercial returns and need for short-term tenancies have resulted in a shortage of this type of accommodation which the market is not able to currently address and we are pleased to see this need recognised in the Strategic Economic Plan.

Without continued investment our local area will be unable to meet its full potential - one that will create significant jobs and deliver a positive economic outcome not just for our area, but for others associated with us.

Yours,

Dr Tony Raven
Chief Executive Officer
tony.raven@enterprise.cam.ac.uk



Jean Hunter
Chief Executive Officer
South Cambridgeshire Hall
Camborne Business Park
Camborne
CB1 0JH

11th September 2014

Dear Jean

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Yours,

Dr Tony Raven
Chief Executive Officer
tony.raven@enterprise.cam.ac.uk



Jonathan Burroughs
Creative Places
3 Kings Parade
Cambridge CB2 1SJ

30th September 2014

Dear Jonathan,

Following our meetings and conversations with members of Cambridge Network, I am keen to participate in or contribute to the discussions about future planning for the Cambridge area.

Cambridge Network has 1,500 business members including most of the high skill businesses in the region. Overall the region is thriving and still growing rapidly, rated as one of the fastest growing regions in the UK by most surveys. The region is one of the engines for growth of the UK economy and Cambridge Network has been supporting that theme for the past 15 years.

You asked for input from Cambridge Network, on behalf of members, in relation to future planning.

As you know, individual businesses find it difficult to put time into this until the point comes that they individually outgrow their space and seek planning permission to expand. They do, however, comment at many of the events we have and as we ask their opinion on the barriers to growth in the UK vs in their many overseas outposts such as India, US and Asia. Some of our largest members such as ARM, Aveva and Domino have made particularly strong comments.

It is vital that we plan for growth, and take into account what our businesses are likely to need. Cambridge has historically been creative and developed a ready supply of property for businesses that carry out research and development. Cambridge Science Park, Business Park and St John's Innovation Park have been enormously valuable in this way. Into the future, as these projects are full and with waiting lists, we need to ensure that further opportunities are brought forward. Property within the built up area of Cambridge seems to be in limited supply because of a hunger for premises at the heart of the cluster, available to entrepreneurs who want ready links with the university and other growing businesses. Businesses tend to need property at relatively short notice, and are often unable to wait for the lead in time it may take to secure planning consents and renovation, build or increasing densities once the need is recognised. I find this is particularly true for the most creative and successful CEOs!

I would welcome your requests for any help I can give in keeping the discussion forward looking and addressing the needs of what we must keep as a thriving, growing and changing Cambridge.

Yours sincerely,

A handwritten signature in black ink that reads "Claire Ruskin".

Claire Ruskin CEng FIET, Chief Executive, Cambridge Network Ltd
Hauser Forum, West Cambridge Site, Cambridge CB3 0GT

www.cambridgenetwork.co.uk

JR/KM/AE/634

19 June 2014

To: Cambridge City Council
South Cambridgeshire District Council

Executive Office
Box number 146
Addenbrooke's Hospital
Cambridge Biomedical Campus
Hills Road
Cambridge CB2 0QQ

Switchboard: 01223 245151
Direct Dial: 01223 217510

www.cuh.org.uk

Dear Colleagues

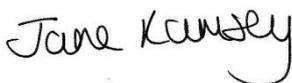
Re: Local plans 2011 – 2031 – Cambridge South Proposal Junction 11 M11

Further to our meeting with James Buxton acting on behalf of the landowners Jesus College and Pemberton Trustees who wish to promote land south of Trumpington for a new science park, we would like to confirm our support for the proposals with particular regard to research and commercial R&D activity which will benefit Cambridge University Hospitals in addition to Cambridge South and beyond.

In addition to that we will be extremely interested in being given opportunities to secure key worker housing to address local recruitment challenges along with enhancements to the green travel plan infrastructures serving the immediate area.

We wish to work closely with the University and yourselves to ensure that these plans can come to fruition over the next two decades.

Yours sincerely



Jane Ramsey
Chair



Dr Keith McNeil
Chief Executive

Sir Hugh Pelham FRS, FMedSci, Director

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Office: +44 (0)1223 267183/267181
Email: hp@mrc-lmb.cam.ac.uk

MRC

Laboratory of
Molecular Biology

James Buxton
Pigeon Investment Management Ltd
Linden Square
146 Kings Road
Bury St Edmunds
IP33 3DJ

April 11th, 2014

Dear James,

RE: proposed Development at Cambridge South

I write in support of this proposed development, as someone with a close interest in the development of life sciences in the Cambridge area. The MRC Laboratory of Molecular Biology has extensive interactions with industry, and has spun out a number of companies such as Cambridge Antibody Technology (now Medimmune), Domantis (now GSK), Heptares and Bicycle Therapeutics. Such activity depends on the availability of facilities for small and growing companies, ideally on the South of Cambridge where the centre of gravity of the life sciences, and clinical facilities, can be found. Currently, most of the space available for companies is full, and there is demand for laboratory facilities, and for land on which to build such facilities, that cannot be met. In particular, the Cambridge Biomedical Campus (CBC), having successfully attracted AstraZeneca, will soon be full.

There is a great opportunity for further development of the life sciences sector in this area, which will inevitably require new sites. The proposed Cambridge South development, being within easy cycling distance of the CBC, would be particularly convenient. Potential easy access from the guided bus (and thus the railway station) and the M11 would be a further advantage.

However, one issue that is already significant in recruiting staff is the difficulty of finding housing nearby that is affordable on an academic (or even industry) salary, or of commuting from an area where housing is more affordable. The majority of our staff cycle to work, but housing within cycling distance is also attractive to London commuters, which increases both demand and prices. Currently planned buildings on the CBC will create significant further pressure. Thus, overall plans for further development of the area need to take fully into account the necessary transport and housing needs, if a successful and sustainable expansion is to be achieved. I certainly hope that this can be managed.

With best wishes,

Yours sincerely

