Greater Cambridge Housing Delivery Study Addendum

2025 Update

Greater Cambridge Shared Planning Service

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Revision History

Revision	Revision date	Details	Authorized	Name	Position
1.0	29/05/2025	Updates to Phase 1 and additional sections for Phase 2	DC	David Carlisle	Associate Director
1.1	19/08/2025	Updates incorporating client comments and updated data	DC	David Carlisle	Associate Director
1.2	18/09/2025	Updates incorporating client comments	DC	David Carlisle	Associate Director
1.3	01/10/2025	Updates to Phase 3 trajectory incorporating client comments	DC	David Carlisle	Associate Director

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1. Introduction

1.1 Purpose of this study

1.1 AECOM have been commissioned by Cambridge City Council and South Cambridgeshire District Council, via the Greater Cambridge Shared Planning Service (GCSP), to provide advice in relation to housing delivery insofar as it relates to the deliverability of the Greater Cambridge Local Plan's ('the Local Plan') emerging housing requirement, site allocations and housing trajectory. The Greater Cambridge Housing Delivery Study (2021), earlier Interim Findings (2020) and subsequent Addendum (2022) have, to date, provided:

- commentary on housing delivery factors in Greater Cambridge;
- recommendations of typical assumptions for housing delivery – lead-in times, build out rates, and windfall assumptions;
- commentary on the growth level options and spatial options assessed; and
- a review of and responses to relevant representations received on the Greater Cambridge Local Plan: First Proposals (2021) that related to the conclusions and recommendations in the Housing Delivery Study (2021).

1.2 This further 2025 Addendum incorporates the following sections (reflecting the tasks undertaken for this commission):

- **Section 1** Introduction to the report, context and outline of tasks
- **Section 2** Review of housing delivery factors and consideration of typical assumptions
- **Section 3** Delivery implications of the emerging housing requirement and spatial options, including advice relating to the necessity for a stepped or average housing requirement
- **Section 4** Consideration of interventions to sustain, increase or accelerate housing delivery
- **Section 5** Delivery implications of the Councils' preferred housing requirement and its housing trajectory
- **Section 6** Conclusion, including recommendations and next steps
- **Appendices** including relevant data

1.2 Context

1.3 This further Addendum has been prepared during 2025 to inform the draft Greater Cambridge Local Plan, that will be subject to public consultation in autumn 2025. The results of some tasks have been used to inform later tasks and the Councils' assumptions that have fed into the emerging Local Plan.

Each task has therefore been undertaken using the most up-to-date information at the time it was completed and reflecting the most recent evidence. For example, the most up to date information on site capacities and development timelines is applied.

1.3 Key tasks

1.4 This further Addendum has been prepared to assist the Councils' decision-making in terms of its preferred housing requirement, spatial strategy and housing trajectory for the draft Local Plan.

1.5 Task 1 was a proportionate review of data and literature in relation to housing delivery factors to enable the confirmation, or otherwise, of previous recommendations on lead-in times, build-out rates and windfall allowance. The results of this review are set out in **Section 2**.

1.6 Task 2 was the consideration of the emerging housing requirement and spatial options, taking account of the conclusions and recommendations from, and following a consistent approach to, the previous assessments of growth level options and spatial options. This was to support the Councils in understanding the housing delivery implications of these options, as a result of changes in circumstances since the Greater Cambridge Local Plan: First Proposals (2021) including a rebased plan period for the Greater Cambridge Local Plan of 2024 to 2045 (rather than 2020 to 2041), a later likely adoption date of 2028/29 (rather than 2025/26), and an amended standard method for calculating local housing need. This also included consideration of whether it would be necessary to justify a stepped housing requirement. The results of this assessment are set out in **Section 3**.

1.7 Task 3 was the consideration of potential interventions to assist the Councils in sustaining, increasing and/or accelerating market and affordable housing delivery. The considerations are set out in **Section 4**.

1.8 Task 4 was the assessment of the deliverability of the preferred housing requirement, and housing trajectory for the draft Local Plan. The results of this assessment are set out in **Section 5**.

1.9 Conclusions, including recommendations and next steps are set out in **Section 6**.

2. Review of housing delivery factors and consideration of typical assumptions

2.1 Introduction

2.1 This section reviews the main assumptions from the 2021 HDS to confirm if they are still appropriate to apply in Greater Cambridge. This includes the consideration of recent monitoring data collected by the Councils and also any evidence from housebuilders annual reports, alongside a wider housing market review and consideration of secondary data sources published since the last update. This section has been completed taking account of the updated national planning policy context, and noting that the plan period has changed and the likely plan adoption date has also changed.

2.2 2021 HDS assumptions

2.2 The 2021 HDS was undertaken in 2020-2021 and the assumptions were based on the most up-to-date data available at the time and the 2021 National Planning Policy Framework (NPPF) policy context. In addition, the initial set of assumptions were subject to targeted consultation with the development industry and benefited from inputs from AECOM's sub-consultant chartered surveyors (HDH Planning and Development Limited) who specialise in local housing market assessments and viability studies nationally. The 2022 Addendum concluded that the assumptions remained realistic and reliable for use in plan-making at that time. The assumptions were developed to inform the new Local Plan, and future annual updates to the housing trajectory.

2.3 The principal 2021 HDS assumptions considered herein are as follows:

- Strategic site lead-in times and build out rates;
- Non-strategic site lead-in times and build-out rates; and
- Windfall allowance

2.4 The strategic site assumptions from the 2021 HDS are repeated in **Tables 2-1, 2-2 and 2-3** below for convenience, and allow for a lead-in time from adoption of the plan to first completions, and then a 'ramping up' of delivery over time, increasing the number of outlets, before then tailing off again towards full site build-out. The highest delivery rate assumptions are applied to the 2,000+ dwelling Sustainable Urban Extensions where market absorption rates are deemed highest and the widest range of housing sizes, types and tenures can be delivered. The 2000+ dwelling New Settlement typology has a slower build-up to the peak reflecting the higher infrastructure requirements, site preparations and construction of access points at the outset and the need to establish a new housing submarket in the area. The lead-in time may be reduced if submission of an outline planning application can happen immediately after adoption of the plan (or a hybrid application is utilised), and these assumptions can be refined as they are applied to individual sites taking

into account site-specific circumstances and the aspirations of individual landowners/developers.

Table 2-1: Strategic site lead-in time and build-out rate assumptions (2021 HDS, AECOM)

Table 28: Strategic site lead-in time and build-out rate assumptions

Site Size	Plan adoption to submission*	Submission to Approval**	Approval to first Completion	Average build-out rate	Average outlets	Peak build-out rate	Peak outlets
200-499	2 years	4	2	50	1	50	1
500-999	2 years	4	2	90	1-2	100	2
1000-1499	3 years	4	2	120	2-3	150	3
1500-1999	3 years	4	2	145	3-4	200	4
2000+ New Settlement	3 years	4	2	200-250	4-5	300	5
2000+ Urban Extension	3 years	4	2	225-275	5	350	7

*N.B. this assumes the preparation of some form of supplementary guidance such as a masterplan, design guide/code or Supplementary Planning Document (SPD) to guide strategic developments of >200 dwellings. This timeframe could be reduced where no supplementary guidance or Green Belt release is required prior to submission of an application.
** Approval is defined as a legally implementable permission for example following approval of Reserved Matters. It is assumed that strategic site promoters will typically seek outline planning approval. However, it is acknowledged that some smaller sites in the 200-499 range could be brought forward for full planning and time savings would be achievable. This should be assessed on a case by case basis (where appropriate).

Table 2-2: Strategic site build-out rate phasing assumptions (2021 HDS, AECOM)

Table 29: Strategic site build-out rate phasing assumptions example

Size band	Y 1	Y 2	Y 3	Y 4	Y 5	Y 6	Y 7	Y 8	Y 9	Y 10	Y 11	Y 12	Y 13	Y 14	Y 15	Y 16	Y 17	Y 18	Y 19	Y 20	Total	Average dpa	Equivalent outlets
200-499	50	50	50	50	50																250	50	1.0
500-999	50	100	100	100	100	100	50														600	86	1.7
1000-1499	50	100	150	150	150	150	150	150	100	50											1200	120	2.4
1500-1999	50	100	150	200	200	200	200	200	150	100	50										1600	145	2.9
2000+ NS	50	100	150	200	250	300	300	300	300	300	300	300	300	300	300	250	200	150	100	50	4500	225	4.5
2000+ SUE	50	150	250	350	350	350	350	250	150	50											2300	230	4.6

Source: AECOM Analysis

Table 2-3: Strategic site trajectories (including lead-in time post adoption, assumed April 2025) (2021 HDS, AECOM)

Table 30: Example strategic site trajectories (including lead-in time post adoption, assumed April 2025)

Size band	20/21	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35	35/36	36/37	37/38	38/39	39/40	40/41	Total in plan period	Peak dwellings per year	Average dwellings per year
200-499	-	-	-	-	-	-	-	-	-	-	-	-	50	50	50	50	50	-	-	-	-	250	50	50
500-999	-	-	-	-	-	-	-	-	-	-	-	-	50	100	100	100	100	100	50	-	-	600	100	86
1000-1499	-	-	-	-	-	-	-	-	-	-	-	-	-	50	100	150	150	150	150	150	150	1050	150	131
1500-1999	-	-	-	-	-	-	-	-	-	-	-	-	-	50	100	150	200	200	200	200	200	1300	200	163
2000+ NS	-	-	-	-	-	-	-	-	-	-	-	-	-	50	100	150	200	250	300	300	300	1650	300	206
2000+ SUE	-	-	-	-	-	-	-	-	-	-	-	-	-	50	150	250	350	350	350	350	250	2100	350	263

Source: AECOM Analysis

2.5 Table 2-3 (or table 30 of the 2021 HDS) shows strategic site trajectories including a lead-in time post adoption of the Local Plan, and assuming adoption in 2025/26. This table was included for illustrative purposes, and its principles still apply even though it is now clear that adoption of the plan will be later, and is likely to be in 2028/29. In order to achieve a 15-year plan period post adoption, the plan period is being amended to cover the period 2024 to 2045 (instead of 2020-2041).

2.6 Table 31 of the 2021 HDS (not replicated here) sets out the assumptions for non-strategic sites (under 200 dwellings), aligned to the Housing and Economic Land Availability Assessment typologies. Again, these assumptions can be refined as they are applied to individual sites, taking into account site-specific circumstances and the aspirations of individual landowners/developers.

2.7 Having considered the representations received during the First Proposals consultation that related to the typical assumptions for lead-in times and build out rates, the 2022 Addendum concluded on pages 30 and 32 that:

> "The site-specific assumptions made by the Greater Cambridge Housing Delivery Study (2021) are considered realistic and reliable for use in plan-making in the Greater Cambridge area, reflecting the strength of the market but without being overly-optimistic and avoiding applying a single average to all site sizes/types."

2.8 The windfall analysis presented in the 2021 HDS report was based on monitoring data over a period of 2006/07-2019/20. The methodology excluded the two highest and lowest monitoring years in order to exclude outliers from the calculation.

2.9 The 2021 HDS report stated at paragraphs 11.7-11.8:

> "Historically the Councils have included a windfall allowance of 350dpa in Greater Cambridge but a review of the data indicates that 500dpa has been delivered in the area. It is considered that a mid-point figure of 425dpa is justified and realistic, however this could be increased by 5% to 450dpa taking into account the likely contribution of new permitted development rights. On this basis we would suggest the split should be 240-255dpa for South Cambridgeshire and 185-195dpa for Cambridge City.
>
> The mid-point approach is considered pragmatic and reasonable for the purposes of supporting this Joint Local Plan, however we would recommend that the Councils review the windfall allowance when preparing evidence to support the successor to the Joint Local Plan so that any 'on the ground' trends for windfall development can be factored into the next plan."

2.10 Having considered the representations received during the First Proposals consultation that related to the windfall allowance, the 2022 Addendum concluded on page 29 that:

"The windfall allowance recommended in the earlier Housing Delivery Study (2021) is based on robust evidence. It is based on a realistic calculation having had regard to the Housing and Employment Land Availability Assessment, historic windfall delivery rates and expected future trends (in accordance with paragraph 71 of the NPPF). The emerging Local Plan policies do not seek to limit the delivery of windfall sites compared to current or previous policies, therefore it is considered realistic to assume that development will occur in line with the windfall calculation. The recommendations made by the Greater Cambridge Housing Delivery Study (2021) for windfalls are considered realistic and reliable for use in plan-making in the Greater Cambridge area."

2.3 Review of data and secondary sources

2.11 In reviewing the 2021 HDS typical assumptions on lead-in times and build out rates, and the windfall allowance, the following local and national data and literature sources have been drawn upon:

- Volume housebuilder annual reports 2017-2024 – Appendix A
- Housing completions on windfall sites in Greater Cambridge 2006/07 to 2023/24 – Appendix B
- Greater Cambridge Housing Trajectory (April 2025)
- Authority Monitoring Report 2023-2024 (GCSP, February 2025)
- Plan for Change (Labour, 2024)
- Housing Delivery Test 2023 (MHCLG, December 2024)
- National Planning Policy Framework (MHCLG, December 2024)
- Indicative local housing need (new standard method) (MHCLG, December 2024)
- Affordable housing supply in England: 2023 to 2024 (MHCLG, November 2024)
- Economic and fiscal outlook (Office for Budget Responsibility, October 2024)
- English Devolution White Paper (MHCLG, December 2024)
- Compulsory Purchase Process and Compensation Reforms (MHCLG, December 2024)
- Autumn Budget 2024 – including the Consultation on future social housing rent policy (Treasury, October 2024)
- Policy paper Brownfield Passport: Making the Most of Urban Land (MHCLG, updated 13 February 2025)
- Start to Finish 3 (Lichfields, 2024)
- Housebuilding market study Final report (The Competition and Markets Authority, 2024)
- Home Builders Federation Bid Farewell (2024)

- Home Builders Federation State of Play 2024/25 (2024)
- Home Builders Federation Forecasts for Housing Supply (2024)
- Land Matters - Increasing Outlets to Boost Housing Delivery (Savills, 2025)
- Home Builders Federation Housing Pipeline Q1 2025 Report (2025)
- Home Builders Federation Housing Pipeline Q2 2025 Report (2025)
- Spending Review 2025 (HM Treasury, June 2025)
- Home Builders Federation Uncontracted Section 106 Affordable Homes: October 2025

National and local housing market and delivery trends

Housing completions and pipeline of permissions in England

2.12 There has been a reduction in housing market activity nationally since 2020-2021 due to challenging market conditions including the impacts of Covid-19, increasing interest rates and mortgage rates, build cost inflation, the end of Help to Buy scheme, the Russian invasion of Ukraine, the mini-budget in September 2022, plus uncertainty over changes to planning policy and legislation.

2.13 In their Forecasts for Housing Supply, the HBF note that at the national level, the net additional dwellings for 2023-24 is down 6% on the previous year, and is an 11% decrease from the peak in 2019-20 (see Figure 2-1). This is almost entirely driven by a drop in new-build completions which dropped 6.5% compared to 2022-23 and is 9% below the peak in 2019-20.

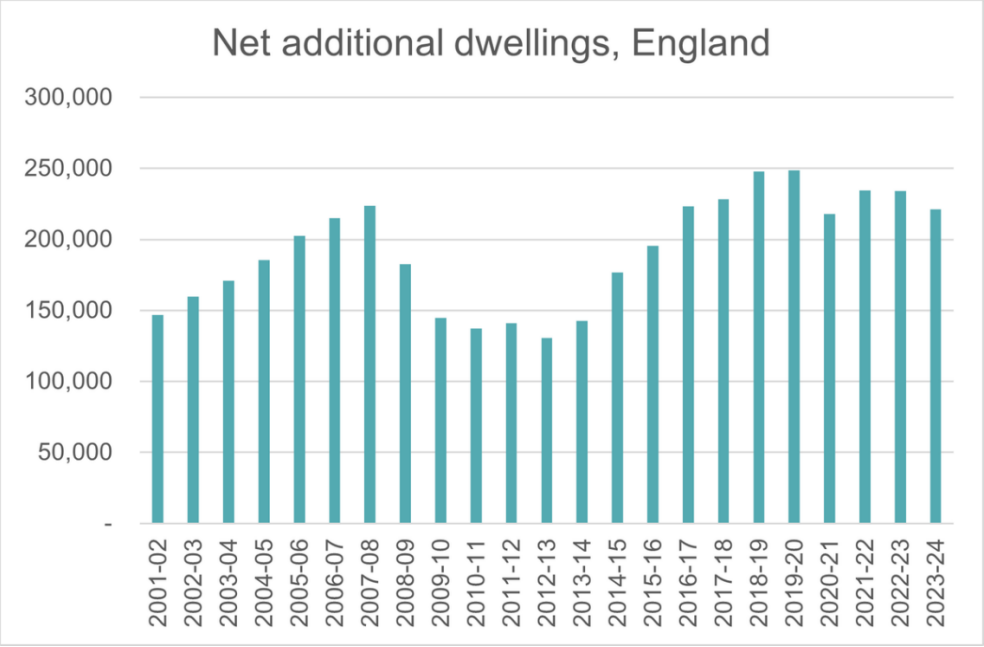


Figure 2-1: Net additional dwellings (source HBF and MHCLG)

2.14 The HBF commissions an annual survey of Small and Medium Enterprise (SME) housebuilders in its “State of Play” report. The 2024/25 report shows that:

- 56% of SME home builders report a 30% uplift in the cost of obtaining planning permission;
- SME home builders face new challenges, such as the implementation of the Biodiversity Net Gain regime, which came into effect in 2024 and is cited by 90% of respondents as a barrier to growth, largely because of delays getting agreement over schemes, with just 4% believing local authorities have the resources or capacity to help them achieve a 10% net gain;
- Land availability also remains a concern with 47% of respondents citing it a major barrier; and
- 80% of respondents identified obtaining suitable offers for Section 106 Affordable Homes to be a barrier to growth.

2.15 Looking forwards, the HBF’s Housing Pipeline report Q2 2025 (September, 2025) tracks planning permissions granted for units and sites (Figure 2-2 below), demonstrating a fall in both measures. The Housing Pipeline report shows the rolling annual number of homes permissioned in England stood at 221,900 in the year to June 2025, illustrating that investment in new housing sites has dropped to the lowest 12-monthly rate in 12 years. In order to meet the Government’s pledge of delivering 1.5 million homes by 2029, an estimated 370,000 permissions per year are required, on average. However, the latest approval rates, according to the HBF commissioned data, are at just 60% of that target.

2.16 In Q2 2025, the UK housing pipeline showed signs of strain. The total number of planning permissions granted declined compared to previous quarters, indicating a slowdown in the early stages of housing delivery. Full planning permissions, essential for progressing to the delivery phase, have not increased, suggesting delays that could hinder future build-out rates (nationally). Additionally, the number of housing starts on site continues to lag behind the volume of permissions granted, pointing to longer lead-in times between planning approval and actual development (nationally). Based on the HBF’s findings, while housing completions remain relatively stable, they are not currently sufficient to meet the growing demand for new homes.

2.17 Focusing on the East of England, the region recorded a moderate volume of planning permissions. However, both starts and completions were subdued, revealing a disconnect between the number of homes approved and those being built. This gap implies either potential delays in the planning system and/or hesitancy among developers, possibly due to market conditions and/or infrastructure constraints. Despite having a high number of units with full permission, the slow conversion to starts suggests that delivery is being held back, which could impact housing supply in the region.

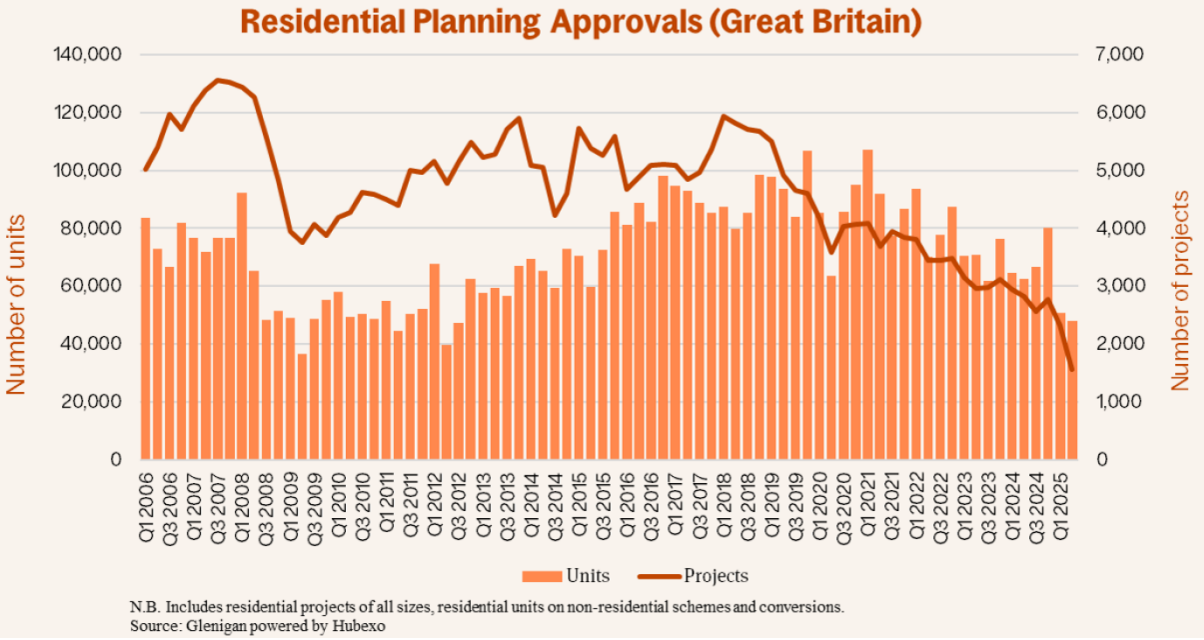


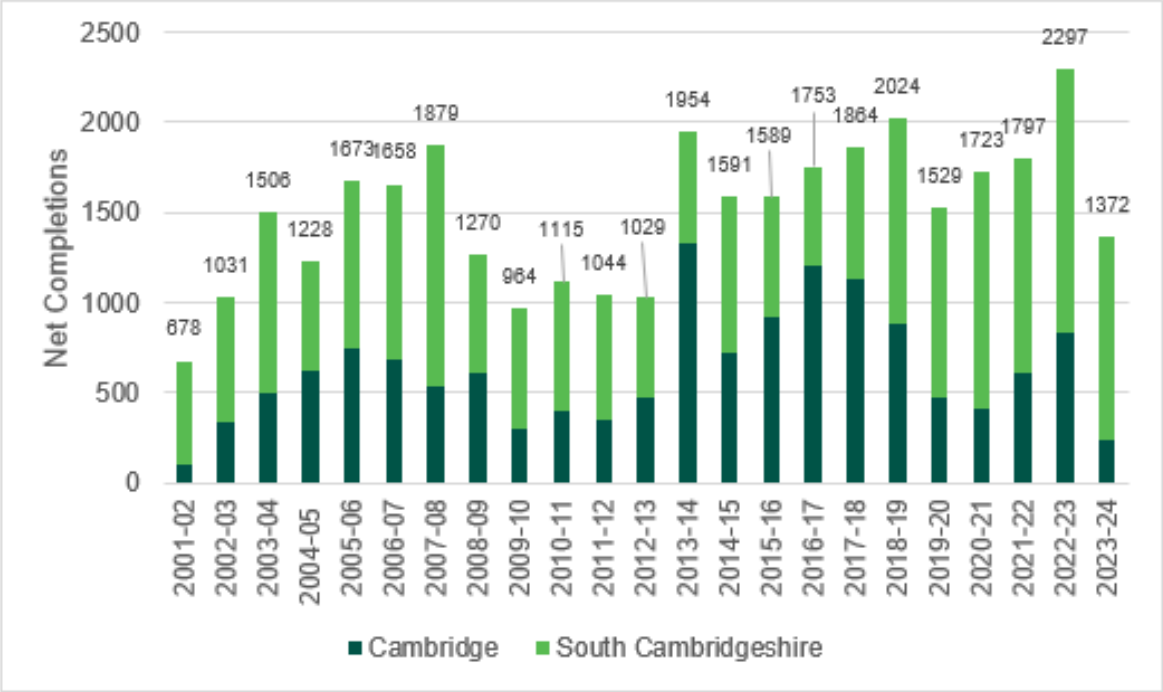
Figure 2-2: Planning permissions for sites and units (source HBF Housing Pipeline Report Q2, 2025)

2.18 A review of volume housebuilder annual reports from 2017 to 2024 shows that on average developers deliver approximately 50 dwellings per outlet per annum (see Appendix A). A recent analysis performed by Savills in 2025 (Land Matters 3: Increasing Outlets to Boost Housing Delivery), sponsored by the Land, Planning and Development Federation, proffered that increasing housing delivery in England requires not just more land, but more sales outlets, especially on small and medium-sized sites. The report notes that the number of outlets operated by major housebuilders is down 12% from its 2018 peak, and sales rates per outlet are around 0.6 homes per week. The data was drawn from 'Savills research using housebuilder trading statements and annual reports based on a basket of major plc housebuilders'. The Savills sales rate per outlet is the average private sales rate and so it is different from the total figures reported in the annual reports data (Appendix A) which include other housing products delivered by the volume housebuilders. The outlet assumptions adopted in this study are judged to be in line with the market conditions in Greater Cambridge.

Housing completions in Greater Cambridge

2.19 As illustrated in **Figure 2-3** (below), housing completions in Greater Cambridge saw a continual rise from 2011/12 to 2018/19, before dropping in 2019/20 and then rising again to a peak of 2,304 dwellings in 2022/23. Similar to national data, there has been a significant drop in completions in 2023/24. This shows that Greater Cambridge has been affected in line with national trends and economic headwinds. "Economic headwinds" refer to negative or challenging economic conditions that hinder growth and prosperity. These headwinds can manifest as factors like rising inflation, increased interest rates, supply chain disruptions, or global economic uncertainty, all of which can slow down economic activity and create difficulties for businesses and individuals.

2.20 However, within Greater Cambridge these fluctuations are also a reflection of the development strategy, and the area being in a transition period as delivery from strategic sites on the edge of Cambridge tails off as sites are completed but before the new settlements reach their peak delivery.



Source: ONS Data and Council Monitoring Data (since 2012)

Figure 2-3: Net Housing Completions (2001/2-2023/4)

2.21 In Greater Cambridge, for 2011/12 to 2023/24, average annual completions were 1,683 dwellings, compared to the joint annual average housing requirement of 1,675 dwellings. This is higher than the 2002/03-2018/19 average of 1,439 dwellings reported in the 2020 Interim Findings.

2.22 The two Councils have both performed well against the Housing Delivery Test 2023 measurement (published 12 December 2024), with Cambridge achieving 114% and South Cambridgeshire achieving 153%.

2.23 It is considered that this recent fall in annual housing completions is a short-term impact and will not be a permanent reduction over a 20-year plan period. Planning reforms and interventions from the new Government are aimed at restoring confidence and certainty to the development industry, as they move towards housing delivery of 300,000 dwellings per annum nationally at the end of the parliament.

2.24 A short-term slow-down in housing delivery has already been taken into account in the Councils' annual update to the housing trajectory (published in April 2025), informed by detailed survey work and engagement with the development industry. This housing trajectory forms the basis of the Local Plan housing trajectory, and therefore it also takes this slow-down into account.

Lead-in times and build-out rates

2.25 The 2020 Interim Findings and 2021 HDS reviewed numerous studies that covered lead-in times and build-out rates, including the Lichfields Start to Finish 1 and 2 reports (2016 and 2020) and the Independent Review of Build Out Final Report (Rt Hon Sir Oliver Letwin MP, October 2018 – the 'Letwin Report'). Since the 2021 HDS, Lichfields has published its Start to Finish 3 Report (March 2024) which updates the data with additional years of monitoring data to 1 April 2023, and additional sites (particularly those 2,000 dwellings and above). This further Addendum considers the Lichfields Start to Finish 3 Report and also takes into account the Competition and Markets Authority Housebuilding Market Study (CMA, February 2024) and Land Matters - Increasing Outlets to Boost Housing Delivery (Savills, 2025).

2.26 The Competition and Markets Authority note that "… that there are several factors driving up the length of the planning process. The main reasons identified, alongside increasing public and political engagement discussed above, were:

- The increasing amount of policy impacting the planning system;
- Local planning authority resourcing constraints, with expenditure on planning falling by c.40% across all three nations over the past decade or so;
- Delays in receiving responses from statutory consultees; and
- The negotiation of site-specific agreements to secure housebuilder contributions to funding of local infrastructure."

2.27 These trends have been noted in the evidence underpinning the HDS to date. The updated data in Lichfields Start to Finish 3 has not made a discernible difference to the lead-in times estimated. The data, shown in **Figure 2-4** below, shows the updated median timeframes from validation to the completion of the first dwelling, which is broadly in line with previous Lichfields data, and the assumptions in the 2021 HDS.

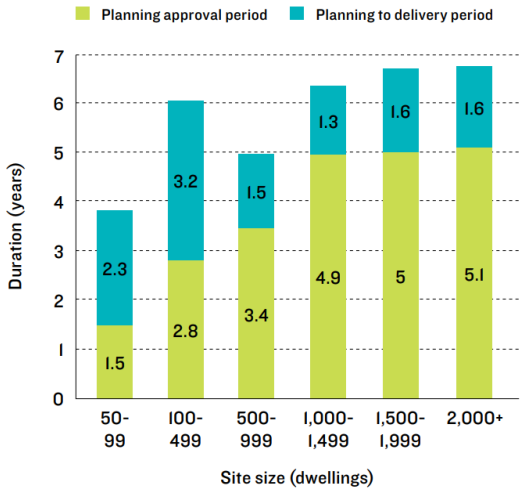


Figure 2-4: Median average timeframes from validation of the first application to completion of the first dwelling (Source: Lichfields Start to Finish 3)

2.28 Lichfields conclude that over the three editions of the report "the mean build-out rate has decreased marginally, whilst the median rate is also lower for sites under 999 dwellings but broadly static for sites of 1,000 dwellings or more. Overall, there is limited difference in the average build-out rates across all three editions which gives us confidence in the findings. However, it does show there [is] a reduction in the presented build-out rates overall."

2.29 As noted in prior HDS reports, the Lichfields Start to Finish series is a national study that takes into account weaker/lower demand housing markets than Greater Cambridge and areas where plans have not been kept up to date. Greater Cambridge is a high demand housing market where the local plan has been kept up to date with new allocations for strategic scale development. The report specifically references two sites in Greater Cambridge as being noteworthy for their high build-out rates: Cambourne and North West Cambridge, with the latter achieving high build-out rates due to the significant proportion of key worker affordable housing. This puts Greater Cambridge at the upper end of the build-out rates estimated in Start to Finish 3.

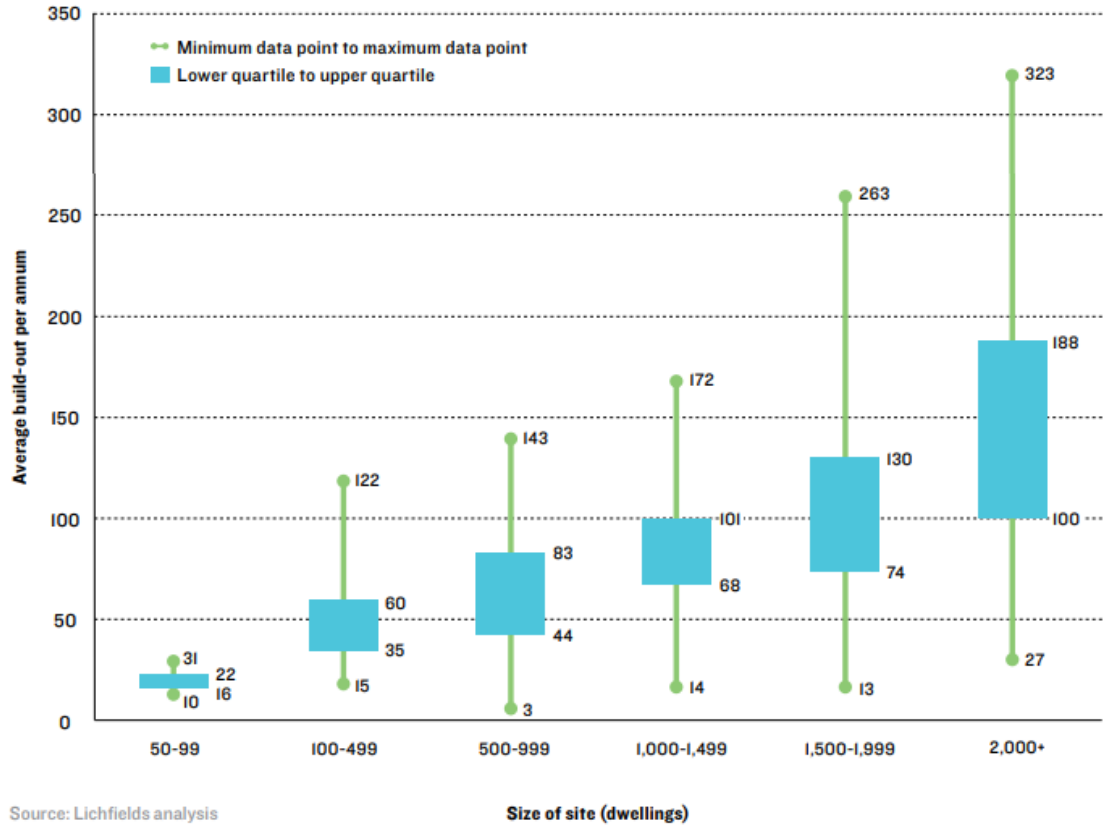


Figure 2-5: Average build-out rate by size of site (dwellings) (Source: Lichfields)

2.30 Regarding the number of outlets, **Figure 2-6** shows that Lichfields note that sites with 5 outlets are able to deliver over 500 dwellings per annum at the higher end, with typical rates for such sites being around 250-300 dwellings per annum. This is consistent with the 2021 HDS assumptions.

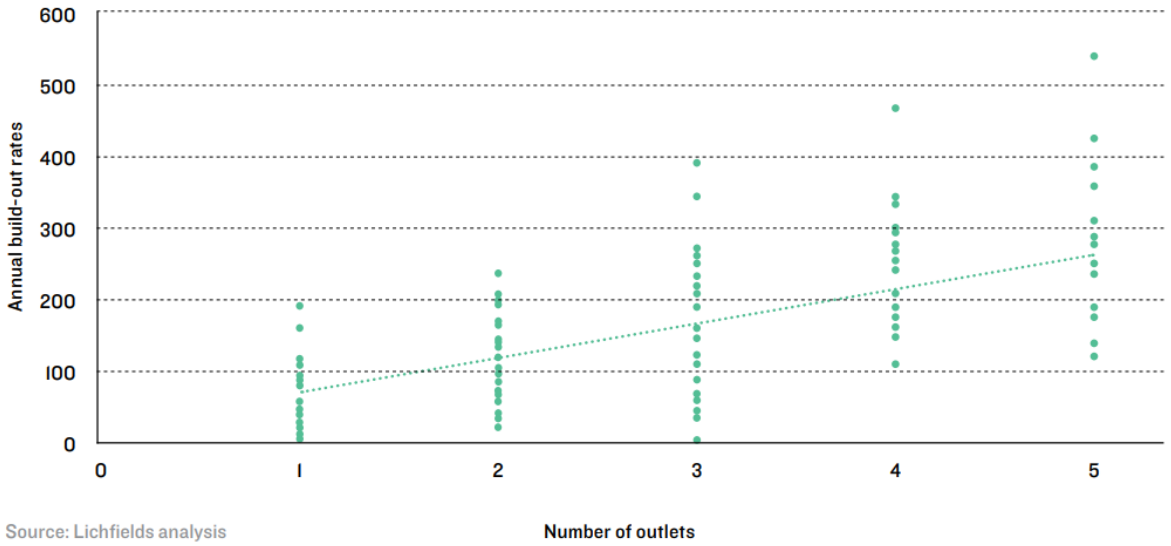


Figure 2-6: Annual build-out rates by number of outlets (Source: Lichfields)

2.31 As shown in **Figure 2-7**, the level of affordable housing delivery increases housing delivery overall, and Greater Cambridge has some of the highest affordable housing requirements in the country (40% on sites of 15 or more dwellings and 25% on sites of 10-14 dwellings in Cambridge City, and 40% on sites of 10 or more dwellings in South Cambridgeshire).

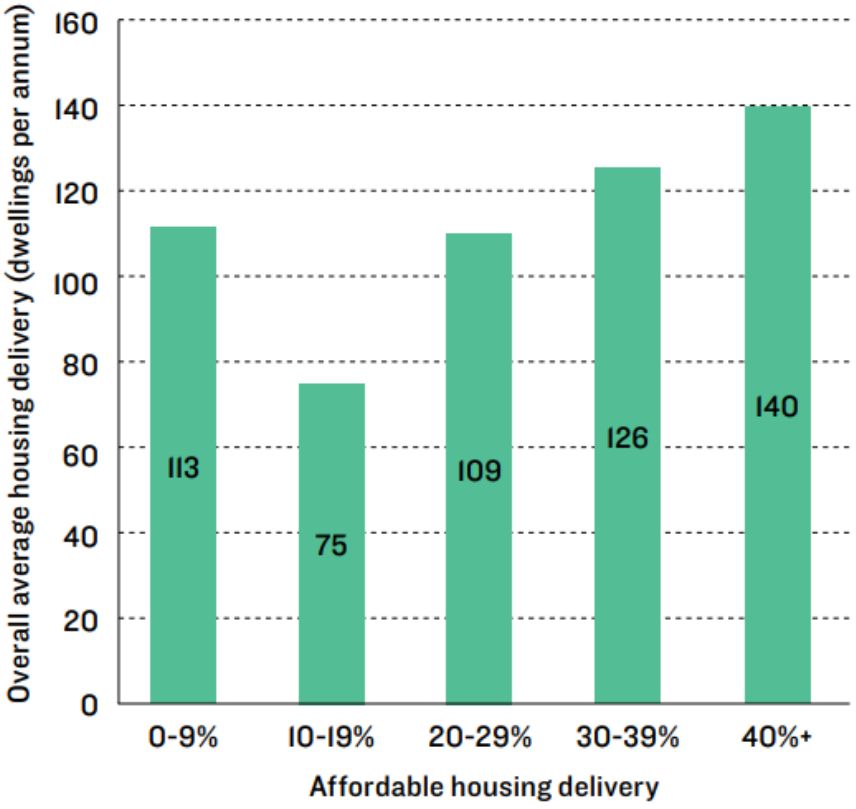


Figure 2-7: Housing delivery by levels of affordable housing (Source: Lichfields)

2.32 The Government's annual affordable housing supply statistics for 2023-24 show:

- 44% of all affordable homes delivered in 2023-24 were funded through section 106 (nil grant) agreements – 27,658 homes.
- 93% of affordable homes delivered in England were new build (excluding unknowns), similar to the last two years.

2.33 The affordable homes delivered represent an estimated 28% of the total number of gross new additions to the housing stock.

2.34 Research in the Bid Farewell report from the HBF in March 2024 noted that the future supply of affordable housing via Section 106 agreements is being threatened as homebuilders are not receiving a sufficient number of bids from Registered Providers (RPs). This is due to RPs having to invest heavily in building safety remediation, tackling damp and mould issues and decarbonising and modernising existing stock, rather than new supply, at a time when (like private housebuilding) inflation, interest rates and build cost has increased.

2.35 It is estimated that there were almost 13,000 Section 106 units with detailed planning permission that were not contracted nationally. Further survey work in October 2024 found that this had increased to over 17,000 units across 139 sites. The HBF's latest update (October 2025) on Uncontracted Section 106 Affordable Homes reveals this as a persistent issue in housing delivery. Despite having detailed planning permission, thousands of affordable units agreed under Section 106 obligations remain uncontracted with Registered Providers (RPs). The FOI data from 105 Local Authorities shows around 900 completed units unsold, 8,500 under construction or due to start within 12 months uncontracted, and over 700 sites delayed or stalled in the past three years due to the lack of RP engagement. This aligns with HBF's earlier 2024 member survey, which identified 17,432 uncontracted units across 31 developers.

2.36 Housing delivery is being constrained nationally, with both affordable and market-sale units affected by stalled sites and delayed phases. Lead-in times are lengthening on sites with uncontracted s106 affordable housing as developers face uncertainty and financial exposure, particularly SMEs who are disproportionately impacted by unsold affordable units. Build-out rates are slowing, with some developers avoiding sites with Section 106 obligations or prioritising smaller schemes to mitigate risk. This trend could threaten the supply of affordable housing and undermine national housing targets, while also placing additional strain on local planning authorities if left unchecked.

2.37 Without government intervention the short-term delivery of affordable housing from permissioned sites will reduce. In response to the acknowledged lack of bids from RPs for affordable housing sites via the Section 106 approach, the Government is taking action and has introduced a new Section 106 "clearing service". In his Written Ministerial Statement on 12 December 2024 Matthew Pennycook stated:

> "As part of the Government's plans to deliver much needed affordable homes, Homes England is today launching a new clearing service to help unblock the delivery of section 106 affordable housing. This

follows reports in recent months of developers experiencing greater difficulty in selling section 106 affordable homes for which they have planning permission. This new service will help improve the functioning of the market for affordable housing, by supporting buyers and sellers to find each other more effectively – with developers able to share details of unsold section 106 affordable homes for registered providers and local authorities to search. The service aims to facilitate dialogue and partnerships that allow homes to be delivered in line with the originally agreed tenure mix set out in section 106 agreements. It will also provide new data and insight into the section 106 market. The Government is calling on all developers with uncontracted section 106 affordable homes, including small and medium builders, to proactively and pragmatically engage with the new clearing service, and on registered providers and local planning authorities to engage positively as providers and enablers of affordable housing. This is an important step in unlocking these homes and driving delivery."

2.38 The s106 clearing service is part of package of wider measures aimed at boosting affordable housing delivery. The UK Treasury's Spending Review 2025 outlines a £39 billion investment over ten years to deliver 300,000 affordable homes, with a strong emphasis on social rent. At least 60% of these homes will be for social rent, with the remainder allocated to shared ownership, affordable rent, and intermediate tenures. Funding will be split between the Greater London Authority (30%) and Homes England (70%), with flexibility for local authorities to shape delivery. The budget also introduces reforms to Right to Buy, rent policy (CPI + 1% from 2026), and new regulatory standards for housing staff and energy efficiency. Strategic partnerships and competitive bidding rounds will begin in winter 2025, aiming to unlock stalled developments and improve delivery mechanisms.

2.39 To support this, the government is offering £2.5 billion in low-interest loans and £1 billion in remediation funding. The reforms aim to reduce reliance on developer-led contributions, and instead promote direct investment and clearer obligations. The viability assessment process is also set to be reformed with the aim to improve transparency and enforcement, ensuring that affordable housing commitments are met. These measures are designed to restore stability and scale in social housing delivery, addressing the chronic shortfall in genuinely affordable homes.

2.40 With the Councils' affordable housing policies and the introduction of the Governments measures to ensure affordable homes continue to be delivered, there should be not implications on the 2021 HDS assumptions. A high proportion of (policy compliant) affordable housing helps to support delivery rates in strong housing markets with high demand such as Greater Cambridge.

Delivery of strategic sites

2.41 The 2021 HDS used housing trajectories for existing strategic site allocations (from the Greater Cambridge Housing Trajectory and Housing Land Supply Report, April 2021), along with anticipated trajectories for proposed new allocations. The Greater Cambridge Housing Trajectory and Housing Land Supply Report (April 2025) is the latest annual update to the housing trajectories for existing strategic site allocations. The report includes developer

surveys and data from other sources. The commentary below provides a site-by-site summary of what has changed for each strategic site between 2021 and 2025, the reasons for this, and how their anticipated delivery timetables relate to the 2021 HDS typical assumptions for lead-in times and build-out rates. Trumpington Meadows and Clay Farm have been excluded from this commentary as these developments are now completed.

2.42 At **North West Cambridge** delivery has continued, albeit in "lumpy" completions with significant numbers of homes completed in some years, and very few in other years. This reflects the design of the development which includes blocks of market homes, key worker homes and accommodation for students. It is still anticipated that the original 3,000 dwellings on this site will be completed by 2031/32.

2.43 The original outline planning permissions for the remaining approximately 1,150 dwellings (of the 3,000 dwellings) have lapsed. New outline planning permissions are required, and pre-application discussions are underway. It is anticipated that the new outline planning applications will be submitted in Q3 2025. A potential increase in the quantum of housing, by approximately 2,500 dwellings, is being discussed. It is anticipated that the first completions on parcels within the new outline planning permissions will be delivered in 2028/29.

2.44 Strong delivery rates have been demonstrated at the site historically, such that the build-out rates are considered achievable. Shorter lead-in times (than the 2021 HDS typical assumptions) from submission of the outline planning application to first completions have been assumed, but this reflects site specific circumstances and the fact that there is already existing infrastructure to build from. New residential parcels can therefore be brought forward more quickly than on a new strategic site that requires initial infrastructure to be provided ahead of the first residential parcels being delivered.

2.45 At **Darwin Green** delivery of the phase within Cambridge has continued, although at a slower pace than previously anticipated. Some homes had to be demolished as a result of faults being found within the foundation slabs. However, the housebuilder of BDW5 & BDW6 has highlighted that current build and sales rates will result in an earlier completion of this parcel than anticipated in previous years.

2.46 The phase within South Cambridgeshire (up to 1,000 dwellings) now has outline planning permission. Delivery of this phase has been delayed by the water availability issue and a planning appeal. However, it is anticipated that this phase will be completed in 2037/38, which is only a year later than anticipated in 2021. The lead-in times for this phase from submission of the outline planning application to first completions are in line with the 2021 HDS typical assumptions.

2.47 The housing trajectory shows delivery from all phases of this development peaking at around 270 dwellings per annum in 2029/30, which is considered realistic given the rates achieved at the Southern Fringe and is in line with the recommendations in the 2021 HDS.

2.48 At **Cambridge East (WING/Marleigh)** all residential parcels now have detailed planning permission and three phases are under construction. The housing trajectory reflects this progress as in 2021 only the first two phases had detailed planning permission, and only the first phase was under construction. As a result of approval of all residential phases, the development now has an additional capacity of 91 dwellings, and it is anticipated that the whole development will be completed by 2032/33.

2.49 Delivery rates show a gradual ramping up from 62 dwellings in 2020/21 to 129 dwellings in 2023/24. This is broadly in line with the HDS typical assumptions of annual delivery and indicative of more than one outlet being in operation.

2.50 At **Cambridge East (North of Cherry Hinton)** a housebuilder now has ownership of the site, and the first two residential parcels have detailed planning permission. Pre-application discussions are underway on further residential parcels. The first dwellings have been completed, and delivery is anticipated to be a quicker build-out than the 2021 housing trajectory based on more up-to-date information regarding deliverability. The Authority Monitoring Report 2023/24 reports that 39 dwellings were delivered in 2023/24 which is broadly in line with the HDS assumptions for delivery in year 1 (~50 dwellings).

2.51 At **Northstowe** there has been lower delivery in the last few years than previously forecast in the 2021 housing trajectory. This is the result of phase 1 tailing off as it is nearing completion, but phase 2 being delayed in being brought forward. The survey responses note that the strategy for Phase 2a has been changed since Urban Splash are no longer delivering this phase. Phase 2b now has detailed planning permission and is under construction. Progress on other parcels within phase 2 has been slower than previously forecast, however, pre-application discussions are underway for further residential parcels with first completions anticipated on these parcels in 2027/28.

2.52 Longer term, annual delivery at Northstowe is anticipated to increase. Northstowe will provide a mix of market homes from a variety of different housebuilders or through self and custom build opportunities, and affordable housing. Homes England are the ‘master developer’ for Northstowe Phases 2, 3a and 3b, and their involvement supports an accelerated housing delivery programme due to their frontloading and financing of infrastructure delivery that allows for serviced parcels to be brought forwards by individual housebuilders.

2.53 Despite the noted delays, the delivery rates provide good evidence of a ramping up of delivery from 13 dwellings in 2016/17 (year 1) to a peak of 278 dwellings in 2018/19 (year 3), and with over 200 dwellings a year being delivered from year 3 onwards, with the exception of the most recent year (2023/24), when completions fell as outlined above. The 2025 housing trajectory anticipates increased delivery rates from 2027/28 onwards factoring in a lead-in time for later phases where discussions are underway and Reserved Matters applications are due to be submitted in 2025/26, and taking account of these serviced parcels being able to deliver quickly once permission has been approved. Whilst ‘lumpier’ in the implementation thus far, the figures are broadly in line with the HDS assumptions.

2.54 **Waterbeach New Town (West)** was slower to start delivery than anticipated in the 2021 housing trajectory, however the first dwellings have now been completed. Significant infrastructure works have been undertaken to allow new homes to be delivered on Key Phase 1 (approximately 1,600 dwellings). Pre-application discussions are underway for further residential parcels within Key Phase 1.

2.55 The developer anticipates that circa 250 dwellings per annum will be achievable with circa 5-7 sales outlets each delivering up to 50 homes per annum. Urban & Civic are the 'master developer' and their involvement supports an accelerated housing delivery programme due to their frontloading and financing of infrastructure delivery that allows for serviced parcels to be brought forwards by individual housebuilders. These longer term assumptions are in line with HDS assumptions for build out rates.

2.56 **Waterbeach New Town (East)** had a resolution to grant outline planning permission in 2021, however the issuing of the decision notice was delayed until December 2024 due to the water availability issue and other negotiations. The developer is currently focussing on securing permissions for a haul road and new wastewater pumping station. The developer anticipates that the first dwellings will be completed 2028/29.

2.57 The developer anticipates a minimum of two housebuilders delivering a rate of 150 dwellings per annum initially, rising to 250 homes per annum. These longer term assumptions are in line with HDS assumptions for build out rates.

2.58 The delivery rates to date on Waterbeach New Town (West), and longer than anticipated lead-in times on both **West and East**, demonstrate that assumptions on new settlements should be cautious where large infrastructure interventions are required to open up the site ready for housebuilders. The HDS assumption for a lead-in time of up to 9 years (depending on a site's planning status) remains appropriate in light of Waterbeach New Town's actual delivery.

2.59 **Bourn Airfield New Village** had a resolution to grant outline planning permission in 2021, however the issuing of the decision notice was delayed until July 2024 due to the water availability issue and other negotiations. The housing trajectory for the site has been pushed back as a result, however the longer-term delivery rates are in line with HDS recommendations. They do not breach the 300 dwellings per annum assumption, and based on the associated commentary from the Councils and developer, the lead-in time appears realistic based upon the works required to open up the site.

2.60 For **Cambourne West** the land north west of Lower Cambourne had outline planning permission and three parcels with detailed planning permission in 2021, however construction had not started on the first dwellings. The first dwellings have now been completed, and there are an increasing number of residential parcels with detailed planning permission. The land within the business park now has full planning permission, which was approved in April 2024. Cambourne West is anticipated to be completed two years earlier than assumed in 2021. The land north west of Lower Cambourne benefits from having two active housebuilders (Vistry and Taylor Wimpey) developing at the same time and the delivery rates from 2021/22 (93 dwellings), 2022/23 (263

dwellings) and 2023/24 (200 dwellings) reflect the fact that there are multiple sales outlets. The land within the business park is being brought forward by the South Cambridgeshire Investment Partnership (South Cambridgeshire District Council and Hill Residential). These figures remain in line with the HDS typical assumptions for new settlements, especially mature schemes such as Cambourne.

Summary

2.61 In summary, the strategic sites are generally delivering in line with the 2021 HDS typical assumptions. AECOM therefore has confidence that the longer-term build-out rate and lead-in time assumptions are realistic based on past delivery trends and strength of the Greater Cambridge housing market more generally. However, it is notable that for the new settlements market demand grows steadily in the early phases until the new settlement becomes an established location in its own right and can begin to generate its own demand as buyers and renters become more aware of the services, placemaking and locational benefits attached to a new settlement. As demand grows it is possible to expand the numbers of outlets and increase the delivery rates.

National policy and regulatory changes

2.62 The 2021 HDS was produced before the 2023 NPPFs or 2024 NPPF were published and so did not take these into account. It was based on the 2021 NPPF in place at the time.

2.63 The Labour party won the 2024 General Election including a manifesto commitment to deliver 1.5 million homes by the end of the parliament. Soon after taking power the new Government consulted on planning reforms to support them in achieving this target, and launched a Plan for Change in December 2024 to provide further detail.

2.64 The Government published the updated NPPF on 12 December 2024. Annex 1 contains the transitional arrangements for plan-making, and this confirms that as the Greater Cambridge Local Plan had not reached the Regulation 19 stage or submission stage by 12 March 2025 that the plan will be considered against the 2024 NPPF.

2.65 In December 2024, significant changes were also made to the standard method formula and the overall national target, moving to a stock-based calculation with greater weighting for affordability and to sum to circa 370,000 dwellings nationally (instead of the 300,000 previously). The revised figures for Greater Cambridge are set out in Table 2-4 below, and show an increase in the local housing need (LHN) figures between the pre-2024 standard method and post-2024 standard method. The latest NPPF and Government reforms are expected to help sustain, increase and accelerate delivery in some circumstances, as set out in the remainder of this section. The HDS 2021 assumptions took a conservative approach to lead-in times and delivery rates. The reforms discussed in this section are unlikely to result in slower or lower delivery in markets such as Greater Cambridge. Our view is that the reforms will help Greater Cambridge to maintain high levels of delivery as they seek to meet their new local housing need.

Table 2-4: Comparison of Local Housing Need figures for Greater Cambridge

Local Authority	Pre-2024 Standard Method LHN (dpa)	New Standard Method LHN (December 2024) (dpa)	New Standard Method LHN (June 2025) (dpa) – updated affordability ratio and housing stock estimates
Cambridge	687	1,135	1,102
South Cambridgeshire	1,039	1,174	1,194
Greater Cambridge	**1,726**	**2,309**	**2,295**

2.66 The 2024 NPPF brought changes to Green Belt policy, including removing the 'openness' test for previously developed land in the Green Belt and introducing a new 'grey belt' policy which could allow additional development to come forward (compared to the previous NPPFs).

2.67 It is proposed that land released from the Green Belt (including grey belt) for housing will be subject to the Government's new 'Golden Rules' which include a 50% affordable housing target (higher than the adopted Local Plan requirements for Greater Cambridge of 40%). Furthermore there is a new NPPF policy in Paragraph 71 which requires a mix of tenures on new developments in order to provide a range of benefits including timely build out rates. The 'Golden Rules' policy and mix of tenures requirement are in line with the Letwin Review and recommendations in the Competition and Markets Authority Housebuilding Study, which should benefit market absorption rates. Given the evidence from the Lichfields Start to Finish reports of higher delivery overall where affordable housing requirements are higher, the combination of higher requirements for affordable housing in the Green Belt and the support for mixed tenure sites have the potential to increase housing delivery overall. This may, in time, result in former Green Belt sites delivering a greater diversification of tenures (compared to brownfield sites) and in turn they may deliver more quickly (subject to viability testing).

2.68 Alongside the publication of the Government's Autumn Budget on 30 October 2024, and prior to the release of the final 2024 NPPF and confirmation of a number of planning reforms, the OBR's Economic and Fiscal Outlook noted at paragraph 2.45 that "We expect housing starts, a leading indicator of net additions to the housing stock, to gradually pick up from a decade-low of around 100,000 in 2024 to reach around 160,000 in 2029. Cumulatively over the forecast, net additions are around 1.3 million".

2.69 Furthermore, at paragraph 3.62 the OBR state “The Government has proposed significant changes to the National Planning Policy Framework as part of wider reforms to the planning system. These changes are yet to be finalised, as responses to a recent public consultation are being processed by the Government. As such, there is insufficient certainty to adjust our current forecast for these measures and we will continue to monitor developments, especially around their implementation given past reform attempts, to judge if and when to incorporate them. These reforms may enable greater delivery of new housing and infrastructure projects, which would boost the associated investment flows, as well as increasing productivity over the longer term.”

2.70 Since the OBR publication, the 2024 NPPF has been published and the revised standard method for calculating local housing need is now policy. Therefore it is arguable that greater certainty exists for the OBR to forecast greater levels of housing delivery in the medium-term given the pro-supply measures taken.

2.71 The Autumn Budget 2024 included a series of interventions pertinent to the consideration of housing delivery factors. Below is a summary of the main Budget announcements that are relevant to this study.

Planning

- The government will provide £46 million of additional funding to support recruitment and training of 300 graduates and apprentices into local planning authorities, accelerate large sites that are stuck in the system, and boost and upskill local planning authority capacity to deliver the government’s wider reform agenda.
- Provide an additional £5 million to deliver improvements to the planning regime for Nationally Significant Infrastructure Projects.
- Develop a 10-year infrastructure strategy to be published alongside Phase 2 of the Spending Review.
- Support for the New Homes Accelerator, and New Towns Taskforce.
- Noted that the Government is seeking views on a ‘brownfield passport’ to ensure that suitable projects get a swift and straightforward approval for development.

Housing

- A £500 million boost to the Affordable Homes Programme to build up to 5,000 additional affordable homes.
- Future grant investment beyond the current Affordable Homes Programme to be announced at Phase 2 of the Spending Review (to run for at least the duration of this Parliament, and to support a mix of tenures, with a focus on delivering homes for social rent).
- Reducing discounts on the Right to Buy scheme and enabling councils in England to keep all the receipts generated by sales to protect existing council housing stock and boost council capacity.
- £3 billion of additional support for SMEs and the Build to Rent sector, in the form of housing guarantee schemes, to support the private housing market.

- Engaging with industry on the mortgage guarantee scheme to support lending at 95%, ending the stop-start availability of the scheme and giving lenders confidence throughout the cycle, while making it easier for first-time buyers. Further details to be included in Phase 2 of the Spending Review.

Devolution

- Working closely with local leaders on the English Devolution White Paper. This sets out the government's plans to widen devolution to more areas and deepen the powers of existing mayors and their combined authorities, ensuring they have the tools needed to boost economic growth.
- Proposes granting borrowing powers for newly established Mayoral Combined (County) Authorities – at Autumn Statement 2016, it was announced that Mayoral Combined Authorities would be given powers to borrow for new functions subject to a cap agreed with HM Treasury.
- Extending the discounted Public Works Loan Board Housing Revenue Account lending rate until March 2026. This will support local authority financing of capital expenditure on social housing in their Housing Revenue Account.

2.72 In Greater Cambridge, the Treasury's proposals align with existing local policies and could help to enhance delivery. Treasury reforms, especially the emphasis on social rent and direct funding, could help to boost delivery locally. The Treasury's push for earlier engagement with providers, flexible planning, and stronger viability enforcement could help unlock stalled developments and improve tenure mix. However, local authorities will need additional resources to manage these reforms effectively, especially given historic underfunding and longstanding resource challenges in the planning profession. Overall, Greater Cambridge stands to benefit, but future success (in boosting housing delivery) will depend on proactive implementation and collaboration between councils, developers, and Registered Providers.

2.73 A consultation on the future social housing rent policy was published alongside the budget. The Government propose that the rent policy should remain in place for at least 5 years, from 1 April 2026 to 31 March 2031. The aim is to enable Registered Providers the long-term certainty and confidence to build tens of thousands of new affordable homes and invest in existing stock, while also ensuring that there are appropriate protections for existing and future social housing tenants (i.e. they remain affordable and existing stock is good quality). The Government recognise that they will miss their 1.5 million new homes target 'without a significant increase in social and affordable housing'.

2.74 As part of the rent policy review, Government states they shall also consult on a proposed new Decent Homes Standard for all affordable housing and new minimum energy efficiency standards for social rented sector homes. Over the past decade affordable homes delivered via Section 106 agreements made up around half of all units. Registered Providers (RPs) have cited regulatory pressure (e.g. drive to net zero, cladding) and financial uncertainty as the reasons for reducing their development programmes and take up on Section 106 affordable homes in the past couple of years. RPs are increasingly seeking more from Section 106 packages in terms of their design and build standards (to avoid future retrofitting liabilities), bedrooms compliant with space

standards, types/tenures they are seeking etc. RPs wish to get more involved in the earlier planning and design of affordable homes through greater partnership working.

2.75 The strategic sites in Greater Cambridge offer opportunities for the Councils and local RPs to experiment in alternative forms of delivery other than solely via Section 106 homes. The future social housing rent policy proposals should help to increase RP's appetite for growth, though the consultations on decent homes standard and energy efficiency standards will need to be factored into short term decision making. It is likely that viability discussion and modelling in the future will need to respond to the bolstered requirements in the NPPF for utilising a tenure mix with uplifted levels of social rent (reflecting Government ambitions for New Towns and sites removed from Green Belt to deliver significant levels of social housing).

2.76 Since the Budget 2024, the Government published its Devolution White Paper and this includes the following proposals of consequence to housing delivery:

- The introduction of a universal system of strategic planning.
- Mayors will be given new development management powers, similar to those exercised by the Mayor of London. This will include the ability to call in planning applications of strategic importance.
- In conjunction with these powers, Mayors will be able to charge developers a Mayoral Levy to ensure that new developments come with the necessary associated infrastructure e.g. a Mayoral Community Infrastructure Levy was introduced in Greater London in 2012 to help finance the Elizabeth Line.
- To enable Mayors to deliver on their plans, Government intends to forge a stronger partnership between Homes England and Established Mayoral Strategic Authorities, increasing Homes England's accountability to Mayors. As part of this, the government intends, over time, to move Homes England to a more regionalised model so that the agency is even more responsive to the economic plan of an area.
- The government will further ensure that Mayors have the funding they need to deliver on their housing ambitions, with control of grant funding for regeneration and housing delivery.
- Established Mayoral Strategic Authorities will also have the ability to set the strategic direction of any future affordable housing programme.

2.77 The additional planning/housing powers and borrowing powers may enable Strategic Authorities to conduct more direct delivery, opening up works and master developer functions independent (or less reliant) on organisations such as specialist private sector master developers and the largest housebuilders e.g. Wellcome Trust/Urban+Civic.

2.78 Homes England has recently announced two new master developer joint ventures with the private sector (partnering with Oaktree Capital Management/Greycoat Real Estate and Barratt Developments/Lloyds Banking Group, known as 'MADE Partnership', respectively) to increase the number of master developers nationally.

2.79 Related to these matters, the Government is seeking to amend the Compulsory Purchase Order (CPO) procedures to enact existing legislation and generally increase the efficiency and fairness of CPO where it involves the delivery of new housing:

> "3. …Directions may be sought for CPOs on schemes providing public benefits, such as development which includes provision of affordable or social housing (which doesn't have to be 100% provision), new schools, or new hospitals. We believe it is right to provide a way to remove hope value from the assessment of compensation when schemes are delivering benefits for communities which are in the public interest.
> 7. The government is concerned there is a significant amount of suitable land available for housing which is currently lying vacant or underutilised and not coming forward for development or, where it is coming forward for development, the provision of affordable housing offered on those sites is below the minimum ask of the local authority."
>
> (Compulsory Purchase Process and Compensation Reforms, MHCLG 2024)

2.80 The Law Commission published its own consultation on compulsory purchase reform on 20 December 2024, which closed on 31 March 2025. This consultation, requested by the MHCLG, focused on a broader review of the legal framework for compulsory purchase and compensation, covering procedural matters and compensation rules. The MHCLG consultation was more specific, targeting reforms to implement the powers introduced in the Levelling-up and Regeneration Act 2023 (such as the ability to remove "hope value" from compensation assessments). Whereas the Law Commission's consultation provided a more comprehensive review of the statutory framework, with the aim of producing recommendations for a draft bill proposing wider-ranging, technical changes.

2.81 The efforts to remove hope value from the majority of CPO scenarios and the proposed updates to guidance should assist Councils, and in theory, make the process of CPO more nimble and less costly for public bodies. This may benefit the Council's future efforts on land assembly and bringing forward long term stalled sites where there is evident market failure.

Summary

2.82 As outlined above, the Government has introduced significant changes to housing and planning policy, in particular through the 2024 NPPF, the revised standard method for calculating housing need, the Autumn Budget 2024, the Devolution White Paper, and Spending Review, all with the aim of boosting housing delivery and ensuring the timely provision of infrastructure. Considering all these changes, the 2021 HDS assumptions for lead-in times and build out rates remain appropriate for use, and can be considered conservative based on the Government's ongoing focus to boost housebuilding.

Local policy context and its implications on housing delivery

Delivery of Infrastructure

2.83 Lead-in times and delivery rates are hugely reliant on the planning and delivery of new infrastructure to serve new residents and businesses (social, green and

physical infrastructure e.g. new transport projects and utilities). In addition to the work being conducted for the Councils' Infrastructure Delivery Plan, there are several notable infrastructure projects and initiatives that are pertinent to future housing delivery, these are summarised below.

2.84 **East West Rail** – East West Railway Company undertook a non-statutory consultation from November 2024 to January 2025 on proposals for a new rail link to connect communities between Oxford, Milton Keynes, Bedford and Cambridge. Proposals include construction of a new railway between Bedford and Cambridge, plus essential railway improvement works to upgrade the existing railway between Oxford and Bedford. The company sought views on these proposals and designs including areas where they were considering options. A statutory consultation is expected ahead of submission of a development consent order application which will seek the necessary consent for the scheme.

2.85 The Secretary of State for Transport has issued safeguarding directions for East West Rail. East West Rail has the potential to benefit Cambourne West and Bourn Airfield allocations and in time should help to speed up delivery and open up additional growth areas, including the Cambourne Expansion in the emerging Local Plan.

2.86 **Cambridge Water Scarcity Group** – the Councils are working with Government and all relevant government departments and other stakeholders to address potable water and water resource issues (including joint working on Water Resource Management Plans, Cambridge Wastewater Treatment Plant Development Consent Order and other strategic site matters). The planned Fens Reservoir is due to be in place in the mid-2030s and water abstraction licences will be further reduced at 2040 as part of the Environment Agency's 'Environmental Destination' plans.

2.87 **Transport strategy** – the forthcoming Greater Cambridge Transport Strategy (GCTS) will be a child document to the Local Transport and Connectivity Plan (2020, updated 2023) (LTCP), led by the Combined Authority and developed with relevant local partners. The programme of future works will need to be aligned to the development of the Joint Local Plan for Greater Cambridge which itself will be responding to the Government's updated 'vision-led' approach to transport planning in the 2024 NPPF.

2.88 **The Cambridge Delivery Group** has been 'reset' by the incoming Government and replaces the previous Government's 'Cambridge 2040' initiative. The Growth Company will focus on the following core activities, as set out in Realising the Full Potential of Greater Cambridge (October 2024):

- Enable and accelerate developments which align with the government's ambitions for Cambridge, and unlocking development on stalled sites.
- Develop the evidence base to support development of an infrastructure-first growth plan and a long-term delivery vehicle: working with experts to assess infrastructure requirements, including water and transport, and laying the foundations to establish a long-term delivery vehicle.

- Identify solutions to complex constraints and support a cross-government approach to unblock existing development, providing the right incentives for successful development in the long-term.
- The work of the Cambridge Growth Company will be supported by £10 million of new funding committed at Autumn Budget 2024. This funding will be used to develop an ambitious plan for housing, transport and wider infrastructure, and for the water needed to support sustainable growth.

Summary

2.89 Housing delivery in Greater Cambridge is closely tied to the planning and implementation of major infrastructure projects, including East West Rail, water resource management, and transport strategies. These projects are essential for unlocking growth areas and supporting new settlements, and this reliance on infrastructure delivery is reflected in the 2021 HDS assumptions for lead-in times and build out rates which show a slower ramping-up of delivery at new settlements of 2,000 dwellings or more, compared to sustainable urban extensions which benefit from higher demand more quickly as they are better located for existing employment opportunities and services, and generally require less new significant infrastructure. As such it is not considered necessary to amend the 2021 HDS assumptions regarding lead-in times and build-out rates. The Cambridge Growth Company, backed by £10 million in government funding, is tasked with accelerating development and resolving constraints, and therefore actual lead-in times may be reduced and / or actual build-out rates may be increased.

Windfalls in Greater Cambridge

2.90 The NPPF 2024 continues to set out that where an allowance is to be made for windfall sites as part of anticipated supply, there should be compelling evidence that they will provide a reliable source of supply, and that any allowance should be realistic having regard to the strategic housing land availability assessment, historic windfall delivery rates, and expected future trends.

2.91 The 2021 HDS considered historic delivery of windfalls in Greater Cambridge between 2006/07 and 2019/20. Four further years of housing completions data (for 2020/21, 2021/22, 2022/23 and 2023/24) are now available, and therefore the historic windfall analysis has been re-run with a larger sample size. The data is presented in **Appendix B**, and is summarised in Table 2-5.

Table 2-5 Historic windfall completions in Greater Cambridge 2006/07 to 2023/24

Source	Cambridge: windfall sites including gardens	South Cambridgeshire: windfall sites including gardens	Greater Cambridge: windfall sites including gardens
Total 2006-2024	4,483	4,503	**8,986**
Average 2006-2024	249	250	**499**
Average excluding highest and lowest two years	234	236	**470**

2.92 Inclusion of four additional years of data, and applying the same methodology as set out in the 2021 HDS of excluding the two highest and lowest years of delivery, results in a revised trend-based average of 240 dwellings per annum (dpa) for South Cambridgeshire and 230 dpa for Cambridge, equalling 470 dpa overall for Greater Cambridge. This is a reduction from the trend-based average of 500 dpa in the 2021 HDS (260 dpa for South Cambridgeshire and 240 dpa for Cambridge).

2.93 There was evidence in 2021 to justify an increase to the windfall allowance from 350 dpa (previously used by the Councils) to 500 dpa, however it was considered pragmatic to use a figure within that range in order to ensure delivery. A mid-point (between 350 dpa and 500 dpa) of 425 dpa was recommended, with a further uplift to the mid-point of 5% – to 450 dpa i.e. 425-450 dpa from windfalls could be justified and was considered to be appropriate for Greater Cambridge. The 2021 HDS recommended that the Councils should review the windfall allowance when preparing evidence to support the successor plan to the Joint Local Plan. This was with a view to refining the windfall allowance upwards, nearer the 500 dpa trend-based average, should this be justified.

2.94 As shown in Figure 2-3 delivery of housing completions (from all sites, including windfalls) fell in 2023/24 in both Greater Cambridge and across the country, for the reasons set out earlier in this report. Within Greater Cambridge, 2023/24 saw the lowest windfall completions since 2006 in Cambridge (98 dwellings), although it is noted that this year coincided with an unusually high number of demolitions on redevelopment sites, where new homes will be delivered in future years.

2.95 Using the extended data set, if a mid-point were to be used this would be 410 dpa for Greater Cambridge, a reduction of 15 dpa (from 425 dpa), consisting of 230 dpa for South Cambridgeshire and 180 dpa for Cambridge. If the 5% uplift was applied as before, this would be 430 dpa for Greater Cambridge, consisting of 240 dpa for South Cambridgeshire and 190 dpa for Cambridge.

Table 2-6: Windfall allowance analysis

Windfall Allowance	Historic	2021 HDS trend-based	2021 HDS mid-point	2021 HDS mid-point plus 5%	2025 HDS trend-based	2025 HDS mid-point	2025 HDS mid-point plus 5%
South Cambridgeshire	220	260	**240**	**255**	240	230	240
Cambridge	130	240	**185**	**195**	230	180	190
Total	350	500	**425**	**450**	470	410	430

2.96 Looking at the data in Table 2-6, it is arguable that the upper end of the range (the 'mid-point plus 5%' assumption) of 450 dpa in the 2021 HDS should be reduced, however it is noted that the trend-based approach is 470 dpa over the extended period of 2006/07-2023/24. Furthermore if all data was included (i.e. not excluding the two highest and two lowest years) then the long-term average is 499 dpa, the same as the 2021 HDS trend-based approach.

2.97 It is considered that the factors leading to lower levels of delivery from windfall sites since the 2021 HDS will be short-term in nature, and with the publication of the 2024 NPPF any impact is likely to be short-term (within the next 5 years) and is likely to be turned around in the medium-longer term alongside progress on the Greater Cambridge Local Plan. The wider development industry, to a large extent, paused planning and development activity prior to the publication of the 2024 NPPF to enable them to take stock of the incoming policy framework. This coincided with a tailing off of applications and completions. The new 2024 NPPF is now beginning to 'bed-in'. The 2024 NPPF introduces several measures aimed at boosting housing delivery on smaller sites, particularly to support community-led, self-build, and custom-build housing. Paragraph 70(b) of the 2024 NPPF explicitly requires local planning authorities to support small sites through both policy and decision-making. This is intended to diversify the housing market by giving greater confidence to small and medium-sized builders, who often face barriers in accessing land and navigating planning processes. The 2024 NPPF also encourages the development of exception sites for community-led housing, even where such sites would not typically qualify under rural exception site policies. These measures, alongside Government's overall push to boost housing supply including Brownfield Passports, will help to maintain windfall site delivery at the historic levels and could help to improve delivery in the longer term with the more permissive policy framework, expansion of permitted development and new policies such as Grey Belt bringing more land supply into the longer term pipeline.

2.98 The 2024 NPPF strengthens policy support for regenerating and intensifying brownfield land within settlements. At paragraph 125 c) it states that planning policies and decisions should "give substantial weight to the value of using suitable brownfield land within settlements for homes and other identified

needs, **proposals for which should be approved unless substantial harm would be caused** [emphasis added], and support appropriate opportunities to remediate despoiled, degraded, derelict, contaminated or unstable land". Promoters of windfall sites should be encouraged by this enhanced policy support.

2.99 Related to the 2024 NPPF paragraph 125, the Government has consulted on the proposal for Brownfield Passports in a recent working paper (Planning Reform Working Paper: Brownfield Passport, MHCLG February 2025). This updated approach, if introduced, would likely lead to measures that further support windfall developments, compared to previous NPPFs. It is anticipated that the passports will build upon past efforts to introduce permission in principle and other similar prior approval approaches. For example, residential-led Local Development Orders, Community Right to Build Orders (CRtBOs), Neighbourhood Development Orders (NDOs) and the introduction of Brownfield Registers. All such mechanisms will help to reduce the need for resources to be directed to smaller non-strategic site allocations and could help to push more windfall proposals though a prior approval route.

2.100 In addition, Qualifying Bodies and Town and Parish Councils can help to supplement the housing land supply identified in a Local Plan by allocating non-strategic sites or exception sites in Neighbourhood Plans or by bringing forward CRtBOs and NDOs. Depending on the final details, Brownfield Passports could represent a further planning reform that may helpfully boost the recycling of brownfield land and increase land optimisation and windfall development in recognised settlements. This demonstrates that the windfall assumptions in this study remain conservative and do not 'bake in' unrealistic expectations/estimates for this source of supply.

2.101 It is also noted that the Councils do not include a windfall allowance in the first three years of the five year housing land supply period, because the first three years are based on deliverable supply from specific windfall sites with planning permission or a resolution to grant planning permission. In the remaining two years of the five year housing land supply period, the Councils do include a windfall allowance (in addition to any anticipated delivery from specific windfall sites) but only at a level that together with anticipated delivery from specific windfall sites totals the recommendations on the overall supply from windfalls.

2.102 On balance, it is considered that the mid-point (without the 5% uplift) **windfall assumption from the 2021 HDS of 425 dpa remains appropriate** for continued use in Greater Cambridge, consisting of 185 dpa in Cambridge and 240 dpa in South Cambridgeshire. This is a cautious but realistic assumption that is still below the long-term average, and market sentiment and national planning policy will combine to improve windfall delivery in the next few years following challenging market conditions between 2019 and 2024.

2.4 Recommended typical assumptions for build out rates, lead-in times and windfalls

2.103 In light of the temporary, short-term nature of recent downward housing delivery trends experienced nationally and locally, and the anticipated bounce-back and exceedance of recent housing delivery by the end of the parliament and soon after anticipated plan adoption, AECOM retains confidence in the 2021 HDS assumptions. It is not considered necessary to amend existing typology-based assumptions regarding lead-in times or build-out rates, as they reflect the strength of the market but without being overly-optimistic and avoid applying a single average to all site sizes/types. The recommendations allow for variations where there is site specific evidence to support a nuanced approach.

2.104 Updated national planning policy should further support windfall brownfield development within existing settlements, and new 2024 NPPF policy support for greater levels of affordable housing in the Green Belt and grey belt and support for mixed tenure housing developments have the potential to improve market absorption rates compared to when the 2021 HDS was published.

2.105 The windfall allowance takes account of the definition and guidance in the 2024 NPPF, and although more recent data shows a short term fall in windfall completions, 425 dwellings per annum (dpa) remains appropriate for use in Greater Cambridge, consisting of 185 dpa in Cambridge and 240 dpa in South Cambridgeshire. This is a cautious but realistic assumption that is still below the long-term average.

2.106 The recommendations included in the 2021 HDS in relation to windfalls, lead-in times and build out rates are still considered to be robust and realistic for the Councils to use as part of their plan making process, and also for other updates to the Greater Cambridge housing trajectory.

2.107 As outlined in the 2022 Addendum at paragraphs 5.10, 5.11 and 5.16 it will be necessary to engage with the promoters at emerging allocated sites to take into account site-specific deliverability factors in estimating the housing trajectories for these sites in the Local Plan, which may lead to divergence from the general typology-based assumptions estimated.

3. Delivery implications of emerging housing requirement and spatial options

3.1 Introduction

3.1 This section assesses, with regard to housing delivery, the working assumption Greater Cambridge Local Plan emerging housing requirement and two alternative spatial options. These are assessed in the same way as the growth level options and strategic spatial options in the 2021 HDS (Chapters 8 and 9 respectively).

3.2 Drawing on the assessments of the strategic spatial options tested in 2020 and 2021, the Councils have identified a hybrid spatial strategy including an additional new settlement (9a) and a hybrid spatial strategy including Edge of Cambridge: Green Belt locations (10a). These two options are very similar to options 9 and 10 that were tested at the First Proposals stage, but provide sites to meet a higher emerging housing requirement.

3.3 Alongside other evidence assessments and the Sustainability Appraisal, consideration of the emerging housing requirement and strategic spatial options assessments ensures consideration of a range of reasonable alternative strategies.

3.2 Context

3.4 In the 2020 Interim Findings we completed assessments of three growth levels and eight strategic spatial options. Further to this, ahead of the First Proposals consultation that took place in Autumn 2021, a further growth level option and two spatial options were assessed in the 2021 HDS. An additional growth level option was assessed in the 2022 Addendum.

3.5 Since this earlier work was completed there have been significant changes to national policy with the introduction of the new stock-based standard method in December 2024, whilst economic conditions are different to those in 2020-2021. Furthermore, the Councils have updated their housing monitoring and the Councils' understanding of the baseline housing trajectory has evolved. To reflect the updated evidence base and the need for strategic policies to cover at least 15 years after plan adoption the Councils have elected to amend the plan period from 2020/21-2040/41 to 2024/25-2044/45.

3.6 Over the years of this study, various calculations and scenarios have been undertaken in relation to the five year supply and Housing Delivery Test, such as application of differing buffers (5% and 20%) in order to help advise the Councils on their emerging housing trajectory attached to the emerging spatial strategies.

3.3 Emerging housing requirement

3.7 The updated stock-based standard method local housing need for Greater Cambridge is 2,295 dwellings per annum (dpa) or 48,195 dwellings over the plan period, using the March 2025 affordability ratios and May 2025 dwelling stock data, as set out in Table 2-4 (in Section 2).

3.8 The 2024 NPPF removed the text relating to 'exceptional circumstances' for an alternative approach to assessing housing need; however in paragraph 69 there still remains flexibility to set a housing requirement that is higher or lower than the housing need figure, stating "the requirement may be higher than the identified housing need if, for example, it includes provision for neighbouring areas, or reflects growth ambitions linked to economic development or infrastructure investment."

3.9 The Councils have updated the housing and economic needs evidence base and re-calculated what an appropriate jobs-led local housing need figure would be. The housing need generated by the forecast jobs growth was almost identical to the figure derived from the government's standard method. Consequently, the Councils consider it appropriate to use the local housing need calculated using the standard method of 2,295 dwellings per annum as their emerging housing requirement.

3.10 **Table 3-1** below assesses the pros and cons of the emerging housing requirement in terms of housing delivery. This is presented in a consistent manner to Table 26 from the 2021 HDS and should be read alongside those conclusions. It should be noted, however, that they are not a direct comparison given that the plan period and baseline housing trajectory have all changed since 2021.

Table 3-1: Assessment of the local housing need calculated using the standard method emerging housing requirement

Housing requirement	Commentary (Pros/Cons)
2,295 dpa	**Pros**: New housing allocations would be required in the medium-longer term, particularly after 2031/32 to "top up" the existing supply where annual delivery is predicted to drop below the annual requirement. The housing requirement would be largely met in the short term through existing commitments. The number of jobs to homes would be balanced to meet housing need nearest to where it arises. The housing and economic land supply would be more flexible to changing circumstances with less reliance on a smaller more concentrated basket of sites as would likely occur under a lower requirement. **Cons:** Without additional allocations in the mid-latter part of the plan period there will be under-delivery implications in terms of five-year housing land supply and the Housing Delivery Test.

Housing requirement	Commentary (Pros/Cons)
	Whilst there is recent evidence of delivering this number of dwellings in a year (2,297 dwellings were recorded as completed in 2022/23 (see Figure 2-3, in Section 2)), the average between 2011/12 and 2023/24 is 1,683 dpa. The local housing need requirement would be a jump in delivery from the adopted housing requirement of 1,675 dpa, with an additional 620 dpa required. Sustaining high levels of completions is challenging, however it is considered a relatively small delivery risk over the long-term given the strength of the housing market locally and the relationship with the planned number of jobs.

3.4 Strategic spatial options

3.11 In order to deliver an emerging housing requirement based on the local housing need calculated using the standard method and taking into account updated monitoring data and plan-making context, the Councils have identified two alternative strategic spatial options capable of providing sufficient allocations. The new strategic spatial options for testing to inform the draft plan development strategy are:

- 9a: Housing requirement 2025: hybrid spatial strategy including additional new settlement (~5,000 homes) and expanding Cambourne
- 10a: Housing requirement 2025: hybrid spatial strategy including Edge of Cambridge: Green Belt (1 or more sites totalling ~3,600 homes.) and expanding Cambourne

3.12 Drawing on the assessments of the strategic spatial options tested in 2020 and 2021, the Councils' hybrid spatial strategy including an additional new settlement and a hybrid spatial strategy including Edge of Cambridge: Green Belt locations would be capable of providing sufficient capacity to meet the emerging housing requirement. These two options are very similar to options 9 and 10 that were tested at the First Proposals stage, but provide sites to meet a higher emerging housing requirement.

Location capacity

Housing trajectories for each option

3.13 To enable testing of the housing deliverability of each strategic option, the Councils produced housing trajectories for each, based on the published April 2025 housing trajectory plus current expectations about emerging allocations. For the additional locations which are the focus of testing the following start year and build out typologies were used, drawing on the 2021 HDS assumptions:

- Edge of Cambridge: standard start year assumption post-plan adoption; sustainable urban extension typology build out rate

- New settlement: standard start year assumption post-plan adoption; new settlement typology build out rate

3.14 The testing of the spatial options was undertaken ahead of the Government's announcement that funding from the Housing Infrastructure Fund will not be made available to support the relocation of the Cambridge Waste Water Treatment Plant, and ahead of the announcement from the landowner of Cambridge airport (Marshall Group) that they are no longer proposing to relocate to Cranfield Airport. Therefore the testing of the spatial options does not take these announcements into account. This issue is considered further in Section 5, where the delivery implications of the Councils' preferred housing trajectory are assessed.

9a: Housing requirement 2025: hybrid spatial strategy including additional new settlement and expanding Cambourne

3.15 The development strategy is a hybrid strategy to meet a variety of needs, focusing growth at a range of locations including in particular Cambridge urban area, edge of Cambridge non-Green Belt, around Cambourne, and at an additional new settlement. Broad areas to include:

- Cambridge urban area
  - North East Cambridge (delivery by 2045 assumption)
  - North West Cambridge (densification of existing planned built up area)
  - Small sites within Cambridge urban area - limited amount of development relating to actual capacity
- Edge of Cambridge non-Green Belt
  - Cambridge Airport (initial phase post 2030, outside Green Belt, delivery by 2045 assumption)
- Western Cluster (focus on transport node)
  - Expanded Cambourne (delivery by 2045 assumption)
- New settlements on public transport corridors
  - Additional new settlement (delivery by 2045 assumption)
- Southern Cluster (integrating jobs and homes)
  - Southern cluster villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access
- Dispersal to villages
  - Rest of rural area villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access

10a: Housing requirement 2025: hybrid spatial strategy including Edge of Cambridge: Green Belt and expanding Cambourne

3.16 The development strategy is a hybrid strategy to meet a variety of needs, focusing growth at a range of locations including in particular Cambridge urban area, edge of Cambridge non-Green Belt, and non-site specific Green Belt locations. Broad areas to include:

- Cambridge urban area
  - North East Cambridge (delivery by 2045 assumption)
  - North West Cambridge (densification of existing planned built up area)
  - Small sites within Cambridge urban area - limited amount of development relating to actual capacity
- Edge of Cambridge non-Green Belt
  - Cambridge Airport (initial phase post 2030, outside Green Belt, delivery by 2041 assumption)
- Edge of Cambridge Green Belt
  - Edge of Cambridge - Green Belt (equivalent to one or more non-site specific Green Belt location/s)
- Western Cluster (focus on transport node)
  - Expanded Cambourne (delivery by 2045 assumption)
- Southern Cluster (integrating jobs and homes)
  - Southern cluster villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access
- Dispersal to villages
  - Rest of rural area villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access

Summary tables of options 9a and 10a

3.17 The full details of strategic spatial options 9a and 10a are in **Table 3-2** and **Table 3-3** below, which shows their total estimated completions during the plan period and beyond. Full trajectories are in **Appendix C**.

Table 3-2: Option 9a Housing requirement 2025: hybrid spatial strategy including additional new settlement and expanding Cambourne

	Homes 2024-45	Homes Post 2045	Homes full build out
Requirement	-	-	-
Housing requirement (annual figure)	2,295	-	-
Local Housing Need (plan period figure)	48,195	-	-
Rough 10% headroom	4,820	-	-

	Homes 2024-45	Homes Post 2045	Homes full build out
Local Housing Need + 10% headroom	53,015	-	-
CURRENT HOUSING SUPPLY	-	-	-
Current supply - Housing Trajectory (1 April 2025)	37,961	7,725	45,686
Current supply - updates to Housing Trajectory	-115	0	-115
Additional homes to be identified	10,349	-	-
ADDITIONAL SOURCES OF SUPPLY	-	-	-
Densification of Cambridge	-	-	-
North East Cambridge	3,950	3,975	7,925
North West Cambridge	2,500	0	2,500
Other smaller urban sites / small sites requirement	12	0	12
Edge of Cambridge non-Green Belt	-	-	-
Cambridge Airport (safeguarded land)	3,950	4,050	8,000
Edge of Cambridge Green Belt	-	-	-
Edge of Cambridge Green Belt - non site specific	0	0	0
Cambridge Biomedical Campus	700	0	700
Western Cluster (focus on transport node)	-	-	-
Extension to Cambourne (East West Rail)	2,550	12,450	15,000

	Homes 2024-45	Homes Post 2045	Homes full build out
New settlements on public transport corridors	-	-	-
Additional new settlement	2,550	2,450	5,000
Southern Cluster (integrating jobs and homes)	-		-
Distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access	185	0	185
Dispersal to villages	-	-	-
Distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access	204	0	204
Total additional sources of supply	**16,601**	**22,925**	**39,526**
Total including current and additional sources of supply	**54,447**	**30,650**	**85,097**
Balance of total supply against Housing requirement	6,252	N/A	N/A
Balance of total supply against Housing requirement + 10% headroom	1,433	N/A	N/A
Total supply vs. Housing requirement: % oversupply	13.0%	N/A	N/A

Notes:

- Previous strategic spatial options explicitly included increased delivery rates at existing major sites delivering beyond 2045 (Northstowe and Waterbeach). These assumptions are retained but are incorporated within the current supply row. In addition, previous strategic spatial options included an increased windfall assumption and dwelling equivalents from student and older people's bedspaces in the updates to housing trajectory row. These are now incorporated within the current supply row.
- Updates to housing trajectory: Removal of 95 dwellings at 379-381 Milton Road (adopted Cambridge Local Plan allocation M1), instead counted in North East Cambridge as part of new Greater Cambridge Local Plan allocation. And removal of 20 dwellings at 82-88 Hills Road and 57-63 Bateman Street (adopted Cambridge Local Plan allocation M5), as proposing to de-allocate as part of new Greater Cambridge Local Plan.

Source: Greater Cambridge Shared Planning

Table 3-3: Option 10a Housing requirement 2025: hybrid spatial strategy including Edge of Cambridge: Green Belt and expanding Cambourne

	Homes 2024-45	Homes Post 2045	Homes full build out
Requirement	-	-	-
Housing requirement (annual figure)	2,295	-	-
Local Housing Need (plan period figure)	48,195	-	-
Rough 10% headroom	4,820	-	-
Local Housing Need + 10% headroom	53,015	-	-
CURRENT HOUSING SUPPLY	-	-	-
Current supply - Housing Trajectory (1 April 2025)	37,961	7,725	45,686
Current supply - updates to Housing Trajectory	-115	0	-115
Additional homes to be identified	10,349	-	-
ADDITIONAL SOURCES OF SUPPLY	-	-	-

Densification of Cambridge	-	-	-
North East Cambridge	3,950	3,975	7,925
North West Cambridge	2,500	0	2,500
Other smaller urban sites / small sites requirement	12	0	12
Edge of Cambridge non-Green Belt	-	-	-
Cambridge Airport (safeguarded land)	3,950	4,050	8,000
Edge of Cambridge Green Belt	-	-	-
Edge of Cambridge Green Belt - non site specific	3,150	450	3,600
Cambridge Biomedical Campus	700	0	700
Western Cluster (focus on transport node)	-	-	-
Extension to Cambourne (East West Rail)	2,550	12,450	15,000
New settlements on public transport corridors	-	-	-
Additional new settlement	0	0	0
Southern Cluster (integrating jobs and homes)	-		-
Distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access	185	0	185
Dispersal to villages	-	-	-

Distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access	204	0	204
Total additional sources of supply	17,201	20,925	38,126
Total including current and additional sources of supply	55,047	28,650	83,697
Balance of total supply against Housing requirement	6,852	N/A	N/A
Balance of total supply against Housing requirement + 10% headroom	2,033	N/A	N/A
Total supply vs. Housing requirement: % oversupply	14.2%	N/A	N/A

Notes:

- Previous strategic spatial options explicitly included increased delivery rates at existing major sites delivering beyond 2045 (Northstowe and Waterbeach). These assumptions are retained but are incorporated within the current supply row. In addition, previous strategic spatial options included an increased windfall assumption and dwelling equivalents from student and older people's bedspaces in the updates to housing trajectory row. These are now incorporated within the current supply row.
- Updates to housing trajectory: Removal of 95 dwellings at 379-381 Milton Road (adopted Cambridge Local Plan allocation M1), instead counted in North East Cambridge as part of new Greater Cambridge Local Plan allocation. And removal of 20 dwellings at 82-88 Hills Road and 57-63 Bateman Street (adopted Cambridge Local Plan allocation M5), as proposing to de-allocate as part of new Greater Cambridge Local Plan.

Source: Greater Cambridge Shared Planning

Pros and cons of options

3.18 The pros and cons of the two strategic spatial options are presented in **Table 3-4** below, drawing on the analysis and trajectory information in **Appendix C**.

This is presented in the same format as Table 27 of the 2021 HDS in order to allow a comparison, although as for the consideration of the pros and cons for the housing requirement in **Table 3-3** above, there are a number differences that prevent a fair comparison on truly like-for-like basis to the 2021 conclusions.

Table 3-4. Option 9a and 10a pros and cons

Option Focus and Description	Pros	Cons	Other comments
Option 9a • Preferred options approach from 2021 (updated as appropriate) • Additional site: a 'new' new settlement. Assumed to avoid competition with other established new settlement locations to the north and west of Cambridge.	• Close geographical proximity between key employment locations and homes which will ensure that housing delivery is responsive to job creation, meeting demand from in-migrants. The homes provided would match job creation to housing development so that demand is met in full. • Ability to provide housing for ownership and affordable housing. • Opportunity to offer self/custom build. • Ability to provide specialist housing if required e.g. older persons extra care because of existing facilities, services and amenities. • Private rented supply e.g. Build to Rent as development would be relatively higher density at Cambridge urban area and along transport corridors.	• North East Cambridge – there may be a risk to relying on delivery from this site as although the relocation of the works has secured Development Consent which has significantly derisked the site, further work is required to comprehensively plan the area and deliver development on the site, which is tied to the timely relocation of the water treatment works. The position should be kept under review during the plan making process as appropriate. • Cambridge Airport – there may be a risk to relying on delivery from this site during the latter part of the plan period, notwithstanding that Marshall has confirmed to the Councils its commitment to relocate and seeks to demonstrate the availability and deliverability of the site. The position should be kept under review during the plan making process as appropriate.	• The balance to find under this scenario spreads development across villages and the southern cluster which could deliver sufficient small sites to meet NPPF paragraph 73 requirements if they are not progressed as single allocations. • Slightly lower delivery in the plan period overall (600 dwellings less than option 10a), due to slightly lower annual delivery from the additional new settlement compared to the additional edge of Cambridge: Green Belt site(s).

Option Focus and Description	Pros	Cons	Other comments
	• Smaller allocations in Cambridge and at the villages will provide early delivery post adoption until new strategic sites begin to deliver. • Providing development in the villages (alongside urban extensions and new settlements) will provide a wider choice of housing in the market for people in terms of size and location and will increase the market absorption rate. • Able to demonstrate a five-year housing land supply (calculated using a 5% buffer and Sedgefield method) at plan adoption and throughout the plan period. • North East Cambridge – Anglian Water has secured a Development Control Order for relocation of the works to an alternative site. • Cambridge Airport – Marshall has confirmed to the Councils its commitment to relocate and	• If the phasing of East-West Rail and the new railway station at Cambourne is delayed then this could delay completions from the Cambourne Expansion. • Potential competition between Cambourne, Bourn Airfield and the Cambourne Expansion with all three under construction at the mid-latter part of the plan period, however the committed Cambourne West site would be past its peak and starting to decline before peak delivery would be reached at the Cambourne Expansion allocation. • Potential competition and reduced market absorption in the latter part of the plan period from around half of the new supply being at new settlements.	

Option Focus and Description	Pros	Cons	Other comments
	vacant possession is anticipated by 2030. • 'Headroom' of 13% against the requirement over the plan period as a whole.		
Option 10a • Preferred options approach from 2021 (updated as appropriate) • Additional site: additional GB allocation. Assumed to be a single site allocation.	• Close geographical proximity between key employment locations and homes which will ensure that housing delivery is responsive to job creation, meeting demand from in-migrants. The homes provided would match job creation to housing development so that demand is met in full. • Ability to provide housing for ownership and affordable housing. • Opportunity to offer self/custom build. • Ability to provide specialist housing if required e.g. older persons extra care because of existing facilities, services and amenities. • Private rented supply e.g. Build to Rent as development would be relatively higher density at	• North East Cambridge – there may be a risk to relying on delivery from this site as although the relocation of the works has secured Development Consent which has significantly derisked the site, further work is required to comprehensively plan the area and deliver development on the site, which is tied to the timely relocation of the water treatment works. The position should be kept under review during the plan making process as appropriate. • Cambridge Airport – there may be a risk to relying on delivery from this site during the latter part of the plan period, notwithstanding that Marshall has confirmed to the Councils its commitment to relocate and seeks to demonstrate the availability and deliverability of the site. The position should be	• The balance to find under this scenario spreads development across villages and the southern cluster which could deliver sufficient small sites to meet NPPF paragraph 73 requirements if they are not progressed as single allocations. • Slightly higher delivery in the plan period overall (600 dwellings more than option 9a), due to slightly higher annual delivery from the additional edge of Cambridge: Green Belt site(s) compared to the additional new settlement .

Option Focus and Description	Pros	Cons	Other comments
	Cambridge urban area, along transport corridors, and at Green Belt locations on the edge of Cambridge. • Reduced market absorption issues by focusing development at the most in-demand location in the area (Cambridge urban area and edge of Cambridge). • Smaller allocations in Cambridge and at the villages will provide early delivery post adoption until new strategic sites begin to deliver. • Providing development in the villages (alongside urban extensions and new settlements) will provide a wider choice of housing in the market for people in terms of size and location and will increase the market absorption rate. • Able to demonstrate a five-year housing land supply (calculated using a 5% buffer and Sedgefield method) at	kept under review during the plan making process as appropriate. • If the phasing of East-West Rail and the new railway station at Cambourne is delayed then this could delay completions from the Cambourne Expansion. • Potential competition between Cambourne, Bourn Airfield and the Cambourne Expansion with all three under construction at the mid-latter part of the plan period, however the committed Cambourne West site would be past its peak and starting to decline before peak delivery would be reached at the Cambourne Expansion allocation. • Lead-in times could be extended for the edge of Cambridge: Green Belt site(s) due to the requirement to release Green Belt land through an adopted plan before applications can be approved (i.e. applications may not be “twin-tracked” during plan-making unless “very special circumstances” can be demonstrated). This is because land promoters and developers	

Option Focus and Description	Pros	Cons	Other comments
	plan adoption and throughout the plan period. • North East Cambridge – Anglian Water has secured a Development Control Order for relocation of the works to an alternative site. • Cambridge Airport – Marshall has confirmed to the Councils its commitment to relocate and vacant possession is anticipated by 2030. • 'Headroom' of 14.2% against the requirement over the plan period as a whole.	may be hesitant to fund applications in advance of confirmation that the plan is found sound and the land is removed from Green Belt or identified as Grey Belt. The lead-in times are dependent on the size and complexity of the sites allocated though.	

3.5 Average or stepped annual housing requirement

3.19 A stepped housing requirement is not needed for either of the spatial options as set out in the 9a or 10a trajectories. The Councils are able to demonstrate a five year housing land supply at plan adoption against the housing requirement (set at standard method local housing need) and demonstrate a rolling five year housing land supply from then on, when calculated using the Sedgefield method and applying a 5% buffer. Lower anticipated delivery in 2024/25 is offset by higher anticipated delivery in 2028/29 and 2029/30 in particular.

3.6 Summary

3.20 Delivering against the emerging housing requirement (local housing need calculated using the standard method) requires new allocations in the mid-latter part of the plan period as the beginning of the plan period is largely met by existing commitments, which should result in the ability to deliver a five-year housing land supply at plan adoption (calculated using a 5% buffer and Sedgefield method) and that the Housing Delivery Test shall be met if delivery takes place as forecast.

3.21 The jobs-led housing figure in the Iceni report is slightly lower than the standard method local housing need figure. Drawing on evidence of historic delivery and assumptions as set out elsewhere in this report, we consider the local housing need annual requirement figure to be achievable whether employing either option 9a or 10a. With expanded powers under the devolution reforms, continued support for affordable homes funding and a revised national/regional/local policy framework (providing greater certainty to the market), we believe Greater Cambridge is well positioned to benefit from these additional levers that could in time boost housing delivery efforts in the planning area.

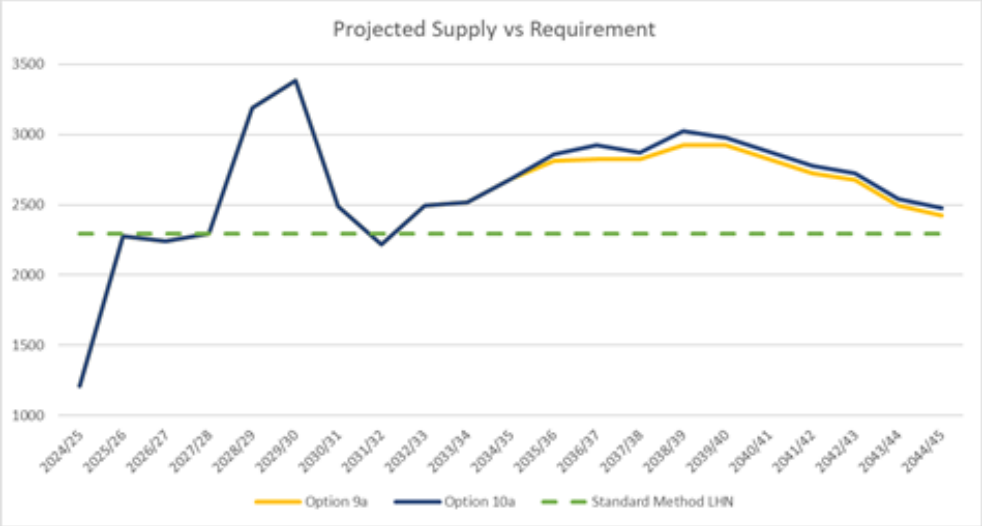
3.22 The new spatial options are both considered to be realistic and deliverable during the plan period as they bring forward a blended supply of sites that would ‘top up’ the baseline housing supply in the mid-latter part of the plan period to meet the emerging housing requirement. AECOM analysis shows that for both spatial options a five year housing land supply can be demonstrated on adoption (when calculated using a 5% buffer and Sedgefield method) and throughout the plan period.

3.23 A stepped requirement is not needed for either of the spatial options as set out in the 9a or 10a trajectories. The Councils are able to demonstrate a five year housing land supply at plan adoption against the housing requirement (set at standard method local housing need) and demonstrate a rolling five year housing land supply from then on, when calculated using the Sedgefield method and applying a 5% buffer. Lower anticipated delivery in 2024/25 is offset by higher anticipated delivery in 2028/29 and 2029/30 in particular.

3.24 The difference between the two spatial options is that the additional new settlement in option 9a is anticipated to deliver 2,550 dwellings during the plan period (with a peak of 300 dpa) whereas the additional edge of Cambridge:

Green Belt site(s) in option 10a is anticipated to deliver 3,150 dwellings during the same period (with a peak of 350 dpa). Option 10a therefore has slightly more 'headroom' in the supply (14.2% compared to 13% for option 9a). Figure 3-1 below shows a comparison of the two housing trajectories, illustrating very little overall difference.

Figure 3-1: Projected Supply for Options 9a and 10a vs Housing Requirement



3.25 Option 10a is likely to have fewer market absorption risks, as the additional development will be partly focussed into established housing markets proven to be in-demand locations. Whereas option 9a would see approximately half of the supply in the latter part of the plan period coming forward at new settlements, which are relatively lower demand locations compared to Cambridge and require a new housing sub-market to be established and built over time through provision of new services, employment and investment opportunities and placemaking. Market absorption risks with Greater Cambridge's existing new settlements projects could be mitigated should the location of the 'new' new settlement be sufficiently distant from the new settlements already under construction or recently granted planning permission. There is however a risk with Option 10a in that the lead-in time may be extended if the developer(s) are unable to 'twin track' any planning applications alongside the plan making process.

3.26 An emerging housing requirement at the level calculated using the standard method is deliverable. Both spatial options are considered to be realistic and deliverable during the plan period as they bring forward a blended supply of sites, and therefore the Councils will need to decide on their preferred option taking account of the pros and cons of each from a housing delivery perspective, and in combination with other considerations. Many of the proposed locations for growth under options 9a and 10a are fixed under both options. Within the overall supply, the difference of 600 dwellings is very small. Options 9a and 10a, at least from a deliverability perspective, are similar. Therefore, there are likely to be other planning considerations that officers and Members will need to weigh into the decision making process to fix a preferred spatial strategy.

4. Interventions necessary to sustain, increase, or accelerate housing delivery

4.1 Introduction

4.1 This section considers potential intervention options available to the Councils to sustain, increase or accelerate housing delivery within the plan period. There is a distinction between increasing overall delivery (i.e. more homes overall and/or increased site capacities) and accelerating delivery within the plan period by delivering homes earlier than could otherwise be achieved based on typical lead-in times and delivery rates. The HDS assumptions are based on typical routes to delivery assuming a private landowner and housebuilder and/or master developer. This section details the interventions that could be utilised to sustain, increase or accelerate housing delivery.

4.2 Context

4.2 Since the 2021 HDS, the Government has consulted on changes to the planning system; launched a New Towns taskforce; made several pertinent policy and financial interventions as part of the Autumn Budget 2024 (including announcements related to East West Rail and new devolution deals), 2025 Spending Review; and provided more briefings on the draft legislation we might expect to be debated as part of the Planning and Infrastructure Bill.

4.3 A Planning Reform Working Paper titled Speeding Up Build Out launched on 25 May 2025, whilst only forming a consultation at this stage and not being formal government policy, nonetheless sets out the Government's thinking on a reformed approach to speeding up the delivery of homes.

4.3 Interventions

4.4 A 'long list' of potential interventions are considered in **Appendix D** that relate to the delivery of all types of housing, including market, specialist housing and affordable housing. Potential interventions are listed under the 'PESTEL' framework headings of political, economic, social, technological, environmental or legal interventions. This approach enables the Councils to assess which interventions or approaches may be most suitable for their local circumstances and indicates what type of resources (beyond the Local Planning Authority) that may be required and/or utilised to bring the proposals forward. Below is a summary of the interventions outlined in Appendix D which expands upon this list and includes commentary on how the interventions may apply in Greater Cambridge (with examples from elsewhere cited):

Political & Governance

- Mayoral & Homes England Powers: Enable land assembly, planning control, and funding to unlock sites and align housing with infrastructure.

- Development Corporations / Cambridge Growth Company: Coordinate infrastructure, unlock stalled sites, and lead strategic growth.
- Homes England as Master Developer: De-risk sites, deliver infrastructure, and support SMEs through phased development.

Economic & Financial

- CIL / s106 Agreements: Provide predictable infrastructure funding and tailored site mitigation.
- Prudential Borrowing: Fund upfront infrastructure aligned with Local Plan goals.
- Wellbeing Powers: Support regeneration and placemaking through flexible local leadership.
- Direct Delivery: Council-led development via Housing Revenue Accounts, Local Authority Trading Companies, and Joint Ventures.
- Public Land Disposal: Release surplus land to support affordable housing and SME delivery.
- Grant Funding: Secure capital for infrastructure and affordable housing via national programmes.
- Rolling Infrastructure Funds: Recycle investment to unlock sites and sustain long-term delivery.
- Tax Incentives & Reliefs: Encourage development and regeneration through fiscal tools.

Social & Community

- Neighbourhood Planning: Local-led plans and orders to allocate sites and streamline permissions.
- Tenure & Product Diversification: Mixed housing types and tenures to boost absorption and meet diverse needs.

Technological & Innovation

- Digital Planning Tools: GIS, 3D modelling, and dashboards to streamline planning and monitor delivery.
- Modern Methods of Construction (MMC): Off-site construction to speed up build times and reduce costs.

Environmental

- Brownfield Land Reuse: Registers and passports to simplify planning and unlock urban sites.
- Biodiversity Net Gain & Ecosystem Services: Enhance placemaking and unlock funding through nature-based solutions.
- Flood Risk Management & GIA Funding: Mitigate risks and unlock land via strategic infrastructure investment.

Legal & Regulatory

- Local Development Orders (LDOs): Simplify planning and promote targeted growth.
- Compulsory Purchase Orders (CPOs): Assemble land and unlock stalled sites.
- Design Codes & Guides: Provide clarity and speed up planning.
- Enforcement Powers: Ensure compliance and maintain delivery momentum.
- Streamlining Planning Procedures: Reduce bureaucracy and improve internal coordination.

4.4 Summary

4.5 The use of interventions is a matter for the Councils to consider as part of the plan-making process and also through the democratic process, working with stakeholders and partner organisations. The use of any of the interventions or 'tools' in **Appendix D** should be tied to a clear business case to demonstrate additionality either by increasing delivery overall or expediting delivery more quickly than otherwise would have been the case without the intervention under normal delivery and implementation approaches. The examples highlighted in Appendix D evidence a number of precedents that have helped to sustain, increase and accelerate housing delivery.

5. Delivery implications of the Councils' draft Local Plan housing requirement and its housing trajectory

5.1 Introduction

5.1 The Councils have created a detailed housing trajectory that demonstrates delivery of their emerging housing requirement (local housing need calculated using the standard method) within the plan period. This housing trajectory will be included in the draft Local Plan that will be subject to public consultation in autumn 2025. This detailed housing trajectory is provided in **Appendix E**.

5.2 This section assesses the detailed housing trajectory and comments on the overall deliverability of the emerging housing requirement and housing trajectory, drawing on recommendations included in this further Addendum and the latest information provided by the Councils, and reviewing where the Councils have taken an approach that differs from the 2021 HDS assumptions for lead-in times and build out rates that are confirmed earlier in this report.

5.3 The assessment highlights any further evidence or clarification necessary to demonstrate that both overall anticipated housing delivery, and the housing delivery of specific sites, are robust and deliverable.

5.2 Draft Local Plan housing trajectory

5.4 The housing trajectory for the draft Local Plan starts with the existing supply as identified in their annual update to the housing trajectory: Greater Cambridge Housing Trajectory and Housing Land Supply Report (April 2025). Some amendments have been made to the anticipated delivery from some of the existing adopted allocations, to take account of the review of these sites through the preparation of the draft Local Plan. The housing trajectory then adds on the anticipated delivery from the proposed new allocations.

5.5 The Councils prepared the baseline housing trajectory of existing supply by assessing the deliverability and / or developability of all adopted allocations, sites with planning permission, and sites of 10 dwellings or more with a resolution to grant planning permission. This includes consideration of developments for self-contained dwellings and developments for communal accommodation for students or older people. The Councils have considered information gathered from a variety of sources, including a survey of developers, landowners and housebuilders, site visits, Planning Performance Agreements, housebuilders' websites, and progress of the site through the planning application process. The baseline housing trajectory includes a windfall allowance of up to 425 dwellings per annum, which is in line with the revised assumption set out in Section 2 of this further Addendum.

5.6 The Councils review of all their adopted allocations has amended the deliverability and / or developability assessment and / or the anticipated site capacity of some of the adopted allocations. The existing commitments (that form the baseline housing trajectory) are therefore anticipated to deliver 37,865 dwellings in 2024-2045, rather than 37,961 dwellings in this period as included in the published annual update to the housing trajectory - a loss of 96 dwellings.

5.7 We consider that through engaging with the development industry, drawing upon monitoring evidence, and reviewing their adopted allocations the Councils have taken a robust approach to the preparation of their baseline housing trajectory, and therefore consider that the anticipated delivery from existing commitments is robust and reliable.

5.8 For the purposes of the assessment of the sites in the housing trajectory for the draft Local Plan, AECOM have only considered the new sites being allocated. This includes strategic sites within and on the edge of Cambridge, new settlements and smaller sites within Cambridge and at villages.

5.9 In August 2025, the Government announced that funding from the Housing Infrastructure Fund will not be made available to support the relocation of the Cambridge Waste Water Treatment Plant (CWWTP), which means that there is uncertainty as to whether the effective delivery of the Councils' vision for North East Cambridge will take place in the time period previously envisaged, including the assumed delivery of housing within the plan period. Building on the polices for this area already included in the adopted Local Plans, for this draft plan consultation the Councils are retaining the allocation for North East Cambridge incorporating the vision previously set out in the North East Cambridge Proposed Submission Area Action Plan, noting the significant benefits that a comprehensive mixed use development at this site would bring. Delivery of this vision would be subject to alternative funding being found to enable the relocation of the CWWTP. Ahead of the proposed submission stage of the Local Plan in 2026, the Councils will continue to engage with relevant partners to confirm a refined position for that later plan-making stage. Noting this position, the Councils have prepared two housing trajectories for the draft Local Plan for AECOM to assess: one including North East Cambridge, and one without.

Assessment of new Local Plan allocations

5.10 The Councils supplied AECOM with the emerging suite of new Local Plan allocations, with a list of the assumptions used to anticipate delivery of each of these allocations. Below is a summary of the key assumptions provided by the Councils relating to each of the new allocations forming part of the emerging Local Plan's housing trajectory within the plan period (2024-2045). For the strategic sites, a commentary is provided reflecting on the main assumptions and any site-specific factors or delivery challenges of relevance. For the non-strategic sites we conclude that the assumptions are aligned with the 2021 HDS assumptions (confirmed earlier in this further Addendum) and do not make any additional site-specific comments.

Non-strategic allocations

Garages between 20 St. Matthews Street and Blue Moon Public House (Policy S/LAC / Site S/C/SMS)

5.11 A small urban site expected to deliver 12 dwellings in 2032/33, aligning with water pipeline completion. All units are anticipated to be completed in a single year via a full planning application.

North Cambridge Academy, Arbury Road (Policy S/LAC / Site S/C/NCA)

5.12 Expected to deliver 150 dwellings starting in 2032/33, assuming outline planning submission post-adoption of the Local Plan. Annual delivery is estimated at 75 dwellings in a suburban context.

1–99 Ekin Road and 1–8 Ekin Walk (Policy S/LAC / Site S/C/ER)

5.13 Pre-application discussions suggest a full planning application in 2025/26, with 26 net dwellings delivered from 2028/29. Demolition is expected a year prior to completions.

2–28 Davy Road and garage blocks (Policy S/LAC / Site S/C/DR)

5.14 Following anticipated planning submission in 2025/26, 48 net dwellings are expected to be delivered from 2028/29, with demolition preceding development.

Hanover Court & Princess Court (Policy S/LAC / Site S/C/HPC)

5.15 This urban site is expected to deliver 37 net dwellings in 2028/29, with all completions in a single year following a full planning application and prior demolition.

Former Garage Block, East Road (Policy S/LAC / Site S/C/GER)

5.16 With garages already demolished, 40 dwellings are anticipated in 2029/30 via a full planning application, with all completions in one year.

Stanton House, Christchurch Street (Policy S/LAC / Site S/C/SH)

5.17 A small urban site expected to result in a net loss of 5 dwellings due to redevelopment, with all completions in 2029/30 and prior demolition.

Cambridge Junction and Cambridge Leisure (Policy S/LAC / Site S/C/CJ)

5.18 Expected to deliver 100 dwellings from 2032/33, following outline planning submission post-Local Plan adoption and lease expiry. Annual delivery aligns with suburban rates.

Cambourne Town Centre (Policy S/CB)

5.19 A full planning application was submitted in 2024 and is being considered. However, 120 dwellings are expected from 2032/33, taking account of water pipeline completion.

Babraham Research Campus (Policy S/RSC/BRC)

5.20 Anticipated to deliver 120 dwellings from 2032/33, with annual delivery of 40 dwellings in a rural context following outline planning submission, and prior demolition.

Maarnford Farm, Duxford (Policy S/RSC / Site S/RSC/MF)

5.21 Expected to deliver 60 dwellings from 2032/33, with outline planning submission post-Local Plan adoption and rural build-out rates.

The Moor, Melbourn (Policy S/RRA / Site S/RRA/ML)

5.22 A small rural site expected to deliver 20 dwellings in 2032/33 via a full planning application.

Highfields Phase 2, Caldecote (Policy S/RRA / Site S/RRA/H)

5.23 A full planning application was submitted in 2022 and is being considered. However, 65 dwellings are expected from 2032/33, taking account of water pipeline completion, and with rural delivery rates of 40 dwellings per year.

Land west of Cambridge Road, Melbourn (Policy S/RRA / Site S/RRA/CR)

5.24 Anticipated to deliver 120 dwellings from 2032/33, following outline planning submission and rural build-out assumptions.

Strategic allocations

North East Cambridge (Policy S/NEC)

5.25 Anticipated to deliver 3,950 dwellings between 2024–2045, with first completions expected in 2032/33 following water infrastructure upgrades. The site benefits from early pre-application discussions and is expected to build out at urban extension rates. Total capacity is 8,350 dwellings including existing permissions.

5.26 **Commentary:** NEC is a 182-hectare brownfield regeneration area located just 15 minutes by bike from Cambridge city centre. It encompasses key sites including the Hartree Core Site (currently occupied by the Cambridge Waste Water Treatment Plant), Cambridge North Station, Chesterton Sidings, and major employment hubs like Cambridge Science Park and St John's Innovation Park. This variety in opportunity sites provides the potential for multiple sales outlets offering a variety of products in different locations in this part of the City. The area has benefited from masterplanning and preparation of technical evidence through preparation of the earlier Proposed Submission Area Action Plan and extant permissions. As such there has already been a large amount of de-risking works conducted over a number of years. With the funding of the relocation of the Waste Water Treatment Plant no longer available, the timing and delivery of the Hartree site (set to deliver around 5,600 homes alongside shops, schools, workplaces, and public spaces across 48 hectares, forming the heart of the North East Cambridge transformation) is less certain. The presence of Cambridge North Station, existing excellent active modes and public transport links to the City Centre and several large employers all bode well for the long term delivery of housing more generally, subject to funding. The closest strategic sites are Waterbeach and Cambridge East and both are considered to be a sufficient distance away and delivering different development typologies that they would not directly compete with North East Cambridge.

Cambridge East (Policy S/CE)

5.27 Anticipated to deliver 3,950 dwellings between 2024–2045, with first completions in 2032/33. Total capacity is 10,591 dwellings including existing sites at Marleigh and Springstead Village.

5.28 **Commentary:** The allocation is centred around the redevelopment of the Cambridge Airport site, which was safeguarded for future use in the 2018 Local Plans. The development will integrate existing sites at Marleigh and Springstead Village and will require key infrastructure such as an eastern access public transport scheme to support access via sustainable modes. Sustainable transport links to other key locations within the city are being explored. It will include a mix of employment spaces, a new retail and cultural centre, schools, and green corridors linking Coldham's Common to the countryside, while preserving Teversham's identity. However, recent press reports note that the landowner (Marshall Group) is no longer relocating to Cranfield Airport. The landowner has confirmed to the Councils that work is ongoing to determine the strategy and timing for vacating and decommissioning the existing airport site, and notwithstanding this that they will relocate the Aerospace business and deliver vacant possession on the airfield by at least 2030. The allocation has the potential to provide multiple access points (Newmarket Road and Coldhams Lane) to support multiple sales outlets and phasing strategies. The closest strategic sites to Cambridge East are Waterbeach, North East Cambridge, Eddington and Grange Farm. However, they are a sufficient distance from one another, based on research from the University of Glasgow, and therefore are unlikely to be in direct competition with each other. In addition, these five sites are in differing locations and contexts and are likely to deliver different products and so will be less likely to be directly competing with one another.

North West Cambridge (Policy S/ED)

5.29 Densification is expected to deliver 2,500 dwellings from 2032/33 to 2040/41, in addition to 3,000 dwellings already anticipated. Also includes student and older persons' accommodation.

5.30 **Commentary:** North West Cambridge is expected to deliver additional homes beyond the current plans/commitments at Eddington, which will be achieved through changes to the dwelling mix and intensification of undeveloped areas/future phases, without encroaching on designated open space. A minimum of 50% affordable housing is required to support University and College key workers, subject to viability and demonstrated need; otherwise, standard affordable housing will be provided. This requirement will help to deliver substantial levels of affordable and different tenures and should help to support the proposed delivery rates. The increase in homes will necessitate further infrastructure investment, funded through additional contributions. The draft plan identifies that the site should be planned for holistically alongside the adjacent West Cambridge site to maximise the area's potential as a hub for innovation and sustainable community development – including access and connectivity to the adjacent Park and Ride and bus stops. The preliminary proposals for future phases show a number of potential access points which

would help to support multiple sales outlets (alongside a variety of development typologies and tenures).

Cambridge Biomedical Campus (Policy S/CBC)

5.31 Expected to deliver 1,000 dwellings from 2034/35, following outline planning submission post-Local Plan adoption. Delivery rates align with strategic site assumptions.

5.32 **Commentary:** Development on the Cambridge Biomedical Campus will include support services for employees and visitors, along with campus worker housing. The designated area for development includes the existing campus and its previously allocated extension, with a new masterplan required to enhance the experience for workers and visitors. This plan should improve campus legibility through better pedestrian and cycle networks, high-quality public spaces, and stronger connections to the proposed Cambridge South Railway Station. The new station and proximity of jobs are positive factors for housing delivery in this location.

Cambourne North (Policy S/CBN)

5.33 A new settlement projected to deliver 2,550 dwellings by 2045, with first completions in 2034/35. Total capacity is 13,000 dwellings.

5.34 **Commentary:** Cambourne North is identified as an allocation for long-term strategic growth, and represents a significant opportunity to expand the existing town of Cambourne, supported by the proposed future station at Cambourne in the 2030s and proposed Cambourne to Cambridge Busway. Future development will need to integrate with the proposed transport infrastructure and enhance sustainability through a mix of services, employment, and transport options. The potential of 15 minute journey time into Cambridge via rail will act as a key driver for future demand. The scale of the location also offers opportunities for multiple access points that could serve multiple sales outlets. The opportunity to comprehensively plan Cambourne North should enable masterplanning that both integrates the new development with the existing town of Cambourne (south of the A428) and enables design coding or similar to ensure a diversity of schemes and products in proximity to the planned station and revamped busway.

Grange Farm New Settlement (Policy S/GF)

5.35 Expected to deliver 2,550 dwellings by 2045, with first completions in 2034/35. Total capacity is 6,000 dwellings.

5.36 **Commentary:** Grange Farm is located to the south east of Cambridge in close proximity to Uttlesford District. There are currently no other strategic-scale new community allocations or commitments in close proximity to the proposed site, which should mean there are reduced market absorption risks. There are benefits to the site location being in close proximity to existing employment hubs (e.g. Babraham Research Campus, Granta Park, Chesterford Research Park and Wellcome Genome Campus) and bordering the A11 and A1307 with the proposed Cambridge South East Transport scheme (CSETs) Travel Hub located within close proximity to the site as well as Whittlesford Parkway, Shelford and Great Chesterford rail stations located less than 10 minutes by car

and 30 minutes by bicycle. From a delivery perspective there are no serious challenges to accessing the site and the potential for north and south access points that would lend themselves to multiple outlets (in time).

Deliverability

5.37 The following section discusses the overall ability of the housing trajectory to deliver against the emerging housing requirement over the plan period, over the first five years and in terms of the Housing Delivery Test.

Housing trajectory over the plan period

5.38 The performance of the housing trajectory (with and without North East Cambridge) relative to the emerging housing requirement is shown below in Figures 5-1 and 5-2. As shown in Appendix E existing supply forms the bulk of the housing delivery over the plan period, with new site allocations taking on greater importance as time progresses. The beginning of the plan period is largely 'fixed' due to the impact of lead-in times on new allocations. The 'hybrid' approach of combining smaller allocations in Cambridge and at the villages that deliver in the middle of the plan period, alongside the longer-term delivery that comes from strategic sites with longer lead-in times, creates a fairly smooth housing trajectory.

5.39 Figure 5-1 and 5-2 shows that using the figures in the housing trajectory the supply is due to exceed the emerging housing requirement over the plan period by 7,083 dwellings (with North East Cambridge) or 3,113 dwellings (without North East Cambridge), a headroom of 14.7% or 6.5% respectively. This is the difference caused by 3,950 dwellings being removed from the trajectory, with a reduction of 350 dwellings per annum at its peak (from 2035/36 onwards).

5.40 We have concluded that several of the largest new settlement allocations are a sufficient distance from one another during the plan period to avoid having any impacts on market absorption. However, the focus on new settlements (Cambourne North, Northstowe, Waterbeach, Grange Farm etc.) may present challenges in later years/beyond the plan period without sustained market demand and the continued growth of Cambridge as a key centre for economic growth nationally. Differentiation in housing types and tenures will be essential to mitigate competition risks.

5.41 With or without North East Cambridge delivery is forecast to exceed the requirement after plan adoption in every monitoring year, with the exception of 2031/32 where a minor shortfall of 116 dwellings is forecast.

5.42 On the basis of the analysis of the proposed housing trajectory over the plan period a stepped annual housing requirement is not considered necessary.

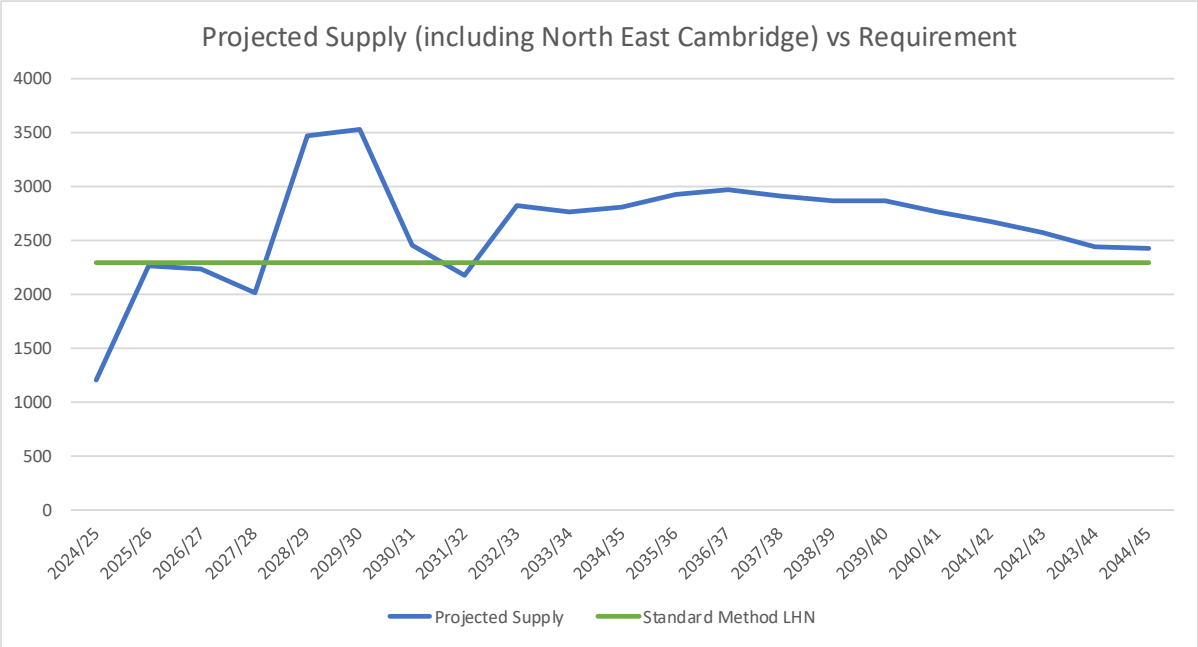


Figure 5-1: Projected supply over the plan period (including North East Cambridge)

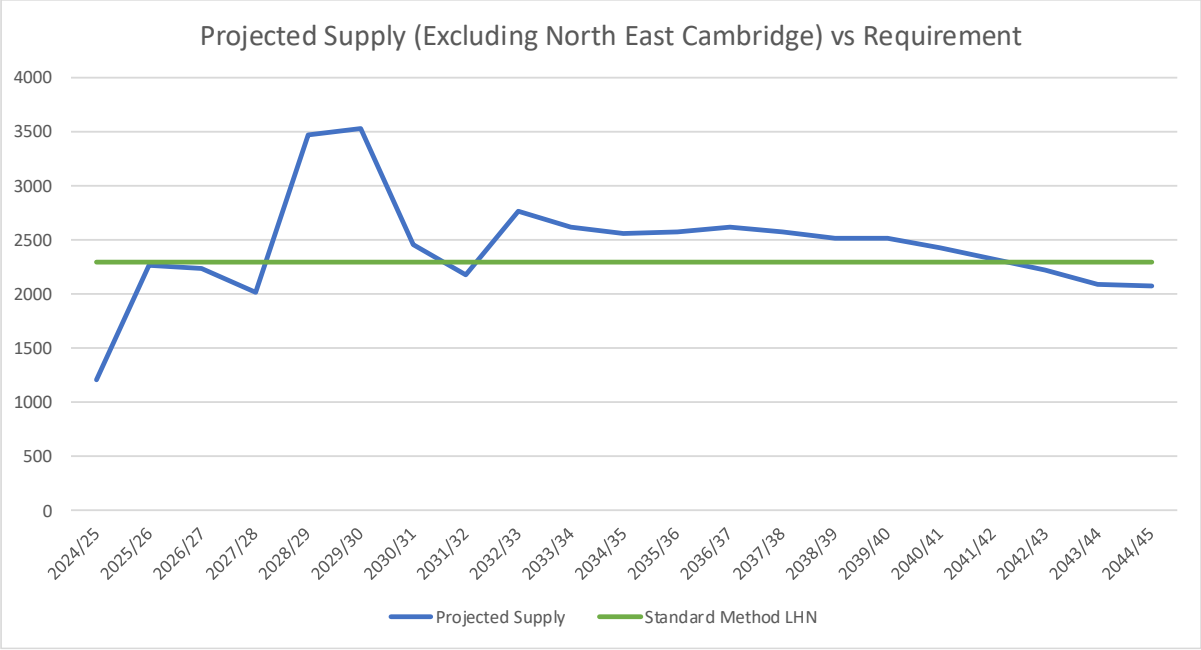


Figure 5-2: Projected supply over the plan period (excluding North East Cambridge)

Housing Delivery Test

5.43 The Councils in recent years have had no consequences from the Housing Delivery Test results. At the point of plan adoption (anticipated to be in 2028/29) it is likely that the 2027 Housing Delivery Test Measurement (covering the period 2024/25, 2025/26 and 2026/27) will be used to determine the appropriate buffer. Based on published and forecast data for Greater Cambridge, it is anticipated that the 2027 Housing Delivery Test Measurement

will show that for Greater Cambridge a 5% buffer will be required to be applied to the five year supply calculation at the point of plan adoption. However this will need to be kept under review should the forecast completions not materialise as expected, the standard method local housing need figure increase during this timeframe, or the timing of publication of Housing Delivery Test results not be as anticipated.

5.44 It is anticipated that the Councils will have no consequences from the Housing Delivery Test once the Local Plan is adopted, as the housing requirement is the standard method local housing need, and the housing trajectory anticipates annual housing completions above the housing requirement in most years.

Five year housing land supply

5.45 The Councils anticipate that the Local Plan will be adopted in the 2028/29 monitoring year, and therefore the five year supply has been calculated for 2028/29 to 2032/33 on the basis that this will be the five year period at the point of adoption. **Appendix E** shows the five year supply calculated using the Sedgefield method and with a 5% buffer for each of the scenarios of with and without North East Cambridge.

5.46 Based on the housing trajectory, the Councils can demonstrate a five year supply for the 2028-2033 five year period, using the Sedgefield method with a 5% buffer, for both of the scenarios. However, this will need to be kept under review as the Councils continue with the plan-making and examination process, taking account of actual completions and any changes to the standard method local housing need figure.

5.47 If the situation changes the Councils will need to consider what they can do to enable a five year supply to be demonstrated at adoption of the Local Plan, taking account of the development strategy and the water supply constraints. Options to consider include using the Liverpool method or a stepped housing requirement, with a case needing to be made for any alternative approach as part of the plan-making and examination process.

5.3 Summary

5.48 The housing trajectories produced by the Councils for the new allocations draw upon the cautious assumptions for build-out rates and lead-in times, as recommended in the 2021 HDS and confirmed earlier in this report, and the Councils have provided sufficient site-specific justification where the assumptions have been departed from.

5.49 Several strategic sites around Cambridge are expected to deliver significant levels of new housing. North East Cambridge is a major brownfield regeneration area near Cambridge North Station, with strong transport links and proximity to employment hubs, though delivery at the Hartree site is uncertain due to funding issues for relocating the wastewater treatment plant. Cambridge East focuses on redeveloping the Cambridge Airport site, integrating existing developments and requiring key infrastructure to support access via sustainable modes, and the landowner has confirmed to the Councils that they will relocate the Aerospace business and deliver vacant possession on the airfield by at least 2030 despite the recent press reports

(regarding their relocation to Cranfield). North West Cambridge will intensify development at Eddington through changes to dwelling mix and use of undeveloped areas, with a strong emphasis on affordable housing for university key workers. The Cambridge Biomedical Campus is set to include campus worker housing alongside support services for staff and visitors, with improved connectivity to Cambridge South Station. Cambourne North is planned as a long-term opportunity to expand the existing town of Cambourne, supported by a future rail station and proposed Cambourne to Cambridge busway. Grange Farm, located near key employment hubs and transport links, is expected to progress with minimal competition from nearby strategic sites and good access potential.

5.50 The Councils have prepared a Local Plan that delivers against the emerging housing requirement over the plan period as a whole, both with and without North East Cambridge. The Councils' development strategy and associated housing trajectory have the ability to deliver a five year housing land supply at plan adoption and throughout the plan period (using a 5% buffer and the Sedgefield method), and perform favourably against the Housing Delivery Test after adoption of the Local Plan.

5.51 The majority of the housing supply over the plan period comes from sites that are already committed, such that the new allocations do not begin to deliver completions at scale until later in the plan period. This means that the Councils have a fairly smooth housing trajectory, and therefore for housing delivery purposes, there is no need to pursue a stepped annual housing requirement.

5.52 The Councils will need to keep their Housing Delivery Test results and five year supply calculations under review as they continue with the plan-making and examination process.

6. Conclusion

6.1 Review of housing delivery factors and consideration of typical assumptions

6.1 Section 2 revisited the assumptions made in the 2021 HDS to assess their continued relevance for Greater Cambridge's emerging Local Plan. It evaluated lead-in times, build-out rates, and the windfall allowance using updated data/secondary sources and a consideration of national policy changes and local delivery trends.

Strategic and Non-Strategic Site Assumptions

6.2 The 2021 HDS assumptions remain robust. Strategic sites (e.g., new settlements and urban extensions) are expected to follow a phased delivery model, with longer lead-in times for new settlements due to infrastructure requirements. Sustainable Urban Extensions (SUEs) typically deliver faster due to proximity to existing infrastructure and demand. Non-strategic sites (under 200 dwellings) follow shorter lead-in and build-out timelines. These assumptions are reaffirmed by recent delivery evidence and developer engagement.

Windfall Allowance

6.3 Historic windfall delivery data (2006–2024) supports a continued allowance of 425 dwellings per annum (dpa), split between Cambridge (185 dpa) and South Cambridgeshire (240 dpa). Although recent years show a slight dip, this is attributed to short-term market conditions and policy uncertainty. The 2024 NPPF and emerging reforms (e.g., Brownfield Passports) are expected to support windfall delivery, particularly on small and brownfield sites.

National and Local Market Trends

6.4 Nationally, housing completions have declined due to economic headwinds, including inflation, interest rate hikes, and planning uncertainty. The HBF reports a 6.5% drop in new-build completions in 2023/24. Planning permissions are at a 12-year low, with only 221,900 homes permissioned in the year to June 2025—far below the 370,000 annual target needed to meet national housing goals.

6.5 In the East of England, permissions are moderate, but starts and completions are subdued. This reflects delays in planning and infrastructure delivery, as well as market hesitancy. Despite a high number of full permissions, conversion to starts remains slow.

6.6 Greater Cambridge saw strong delivery from 2011 to 2023, peaking at 2,304 dwellings in 2022/23. However, completions fell in 2023/24, mirroring national trends. The average annual delivery from 2011–2024 was 1,683 dwellings, slightly above the previous Local Plan requirement of 1,675 dpa. The Councils performed well in the 2023 Housing Delivery Test, with Cambridge at 114% and South Cambridgeshire at 153%.

6.7 The Lichfields Start to Finish 3 report (2024) confirms previous findings: median lead-in times and build-out rates remain consistent. Sites with multiple outlets can deliver up to 500 dwellings per annum. Greater Cambridge's strategic sites (e.g., Cambourne, North West Cambridge) outperform national averages due to strong demand and infrastructure readiness.

6.8 Affordable housing delivery is increasingly constrained. Over 17,000 Section 106 units remain uncontracted nationally due to Registered Providers (RPs) facing financial and regulatory pressures. This has led to stalled sites and slower build-out rates. The Government has responded with a Section 106 Clearing Service and a £39 billion investment in affordable housing over 10 years, aiming to restore delivery momentum.

Policy and Regulatory Changes

6.9 The 2024 NPPF (and 2024/25 PPG updates) introduced significant reforms, including a new stock-based standard method which increases Greater Cambridge's local housing need to 2,295 dpa. Green Belt policy changes (e.g., "grey belt" and "golden rules") support higher affordable housing delivery.

6.10 The Autumn Budget 2024, Spending Review 2025 and Devolution White Paper provide funding and powers to local authorities to accelerate housing delivery. These reforms are expected to support Greater Cambridge's delivery ambitions and reinforce the 2021 HDS assumptions.

Strategic Sites

6.11 Delivery of strategic sites is generally aligned with HDS assumptions. Sites like Northstowe, Darwin Green, and Waterbeach are progressing, albeit with some delays due to infrastructure and planning issues. The Cambridge Growth Company, backed by £10 million in Government funding, is tasked with accelerating development and resolving constraints.

Housing delivery factors and typical assumptions – Summary

6.12 The 2021 HDS assumptions for lead-in times, build-out rates, and windfall allowances remain valid and conservative. Recent national and local trends, policy reforms, and infrastructure investments support their continued use in plan-making. Greater Cambridge is well-positioned to meet its emerging housing requirement, provided delivery is supported by proactive planning, infrastructure coordination, and market engagement.

6.2 Delivery implications of emerging housing requirement and spatial options

6.13 Section 3 assesses the implications of Greater Cambridge's emerging housing requirement and two strategic spatial options (Option 9a and Option 10a) on housing delivery. The analysis builds on previous assessments from the 2021 HDS and incorporates updated national policy, economic conditions, and local evidence.

Emerging Housing Requirement

6.14 The updated standard method for calculating local housing need sets Greater Cambridge's requirement at **2,295 dwellings per annum**, totalling **48,195 homes** over the 2024–2045 plan period. This figure aligns with jobs-led growth forecasts and is considered deliverable based on historic performance and market strength. While it represents a step up from the previous requirement of 1,675 dpa, the area's strong housing market and employment growth support its feasibility.

6.15 Two Strategic Spatial Options were assessed:

- Option 9a: A hybrid strategy including an additional new settlement (~5,000 homes) and expanding Cambourne.
- Option 10a: A hybrid strategy including Edge of Cambridge Green Belt sites (~3,600 homes) and expanding Cambourne.

6.16 Both options blend urban densification, strategic sites, and village dispersal. They are designed to "top up" the existing housing supply in the mid-to-late plan period, ensuring delivery against the emerging requirement.

Deliverability and Housing Trajectories

6.17 Both options demonstrate the ability to maintain a five-year housing land supply at plan adoption and throughout the plan period. Option 9a delivers 54,447 homes (13% headroom), while Option 10a delivers 55,047 homes (14.2% headroom). The trajectories show a smooth delivery curve, with early completions from committed sites and later delivery from strategic allocations.

6.18 Option 10a offers slightly higher delivery within the plan period and fewer market absorption risks due to its focus on established housing markets. Option 9a relies more heavily on new settlements, which may face slower initial uptake but benefit from long-term infrastructure investment and placemaking.

Stepped Requirement

6.19 A stepped housing requirement is not necessary. Both options demonstrate sufficient delivery to meet the standard method requirement from plan adoption, with higher delivery forecast in later years offsetting early shortfalls.

Spatial options 9a and 10a – Summary

6.20 Both spatial options are considered realistic and deliverable, with minor differences in delivery timing and market risk. The Councils are well-positioned to meet their housing target, and the choice between options will depend on broader planning considerations beyond deliverability alone.

6.3 Delivery implications of the Councils draft Local Plan housing requirement and its housing trajectory

6.21 The Councils have developed a detailed housing trajectory to support delivery of the emerging housing requirement—**2,295 dwellings per annum**—over the 2024–2045 plan period. This trajectory underpins the draft Local Plan and reflects updated site assessments, developer engagement, and monitoring data.

6.22 The trajectory combines existing commitments (adopted allocations, permissions, windfalls) with new proposed allocations. Adjustments to site capacities and deliverability assessments have led to a minor reduction in existing supply (96 dwellings). The baseline trajectory is considered robust and evidence-led.

6.23 Two versions of the trajectory were prepared:

- Including North East Cambridge (NEC): assumes relocation of the wastewater treatment plant.
- Excluding NEC: reflects current uncertainty due to withdrawn infrastructure funding.

6.24 With NEC: 7,083 dwellings are anticipated above the housing requirement (14.7% headroom). Without NEC: 3,113 dwellings are anticipated above the housing requirement (6.5% headroom). There is a minor shortfall forecast in 2031/32 (116 dwellings); otherwise, annual delivery exceeds the housing requirement.

6.25 The Councils' housing trajectory demonstrates a robust five-year housing land supply at the point of Local Plan adoption. Using a 5% buffer and the Sedgefield method, the forecasted supply equates to 5.34 years with North East Cambridge included, and 5.32 years without it. The trajectory shows a smooth delivery curve, with early completions from committed sites and later contributions from strategic allocations, ensuring sustained delivery throughout the plan period.

6.26 The trajectory's alignment with national policy and local growth ambitions supports its credibility, and no stepped housing requirement is deemed necessary due to the fairly smooth housing trajectory. The Councils will need to keep their Housing Delivery Test results and five year supply calculations under review as they continue with the plan-making and examination process.

Key Delivery Challenges

Dependencies

- North East Cambridge delivery is contingent on relocating the Cambridge Waste Water Treatment Plant, now unfunded.
- Cambridge East depends on Marshall's relocation from the airport site, and Marshall's have confirmed to the Councils that they will relocate the Aerospace

business and deliver vacant possession on the airfield by at least 2030 despite the recent press reports.

Market Absorption

- We have concluded that several of the largest new settlement allocations are a sufficient distance from one another during the plan period to avoid having any impacts on market absorption. However, the focus on new settlements (Cambourne North, Northstowe, Waterbeach, Grange Farm etc.) may present challenges in later years/beyond the plan period without sustained market demand and the continued growth of Cambridge as a key centre for economic growth nationally.
- Differentiation in housing types and tenures will be essential to mitigate competition risks.

6.4 Next steps

6.27 The Councils will be consulting on the draft Local Plan in autumn 2025. Feedback should be sought on the housing trajectory and the assumptions contained within it for the new allocations, particularly from the landowners, site promoters and developers of these sites to understand if they have any concerns with the trajectory.

6.28 Depending on the feedback received there may be a need to revise the lead-in time and delivery rate assumptions for individual new allocations and to update the housing trajectory as the plan is progressed to the next stage, however as previously stated it is considered that the assumptions that form the basis of the housing trajectory are reflective of local and national evidence for lead-in times and delivery rates. AECOM consider that officers have applied these assumptions correctly to the non-strategic and strategic allocations with minimal divergence reflecting site-specific circumstances.

6.29 Our findings evidence there is currently headroom above the local housing need requirement. However, should any variables change, such as the standard method local housing need, the site capacities or delivery timetables, the anticipated Housing Delivery Test results, or the five year supply calculations, then it would be prudent to reassess the housing trajectory prior to submission of the Local Plan.

Appendix A Housebuilder Annual Reports Review 2017-2024

A.1 Housebuilder completions by outlet

The table overleaf summarises the key data from volume housebuilder annual reports. This shows the number of completions and the number of outlets reported. AECOM has provided an average level of delivery per outlet based on a synthesis of this data.

The results are helpful in demonstrating average levels of delivery nationally from the largest active housebuilders.

House Builder	2017: Completions	2017: Sales Outlets	2017: Average per outlet	2018: Completions	2018: Sales Outlets	2018: Average per outlet	2019: Completions	2019: Sales Outlets	2019: Average per outlet	2020: Completions	2020: Sales Outlets	2020: Average per outlet
Barratt Developments	17,395	366	48	17,579	368	48	17,856	370	48	12,604	366	34
Persimmon Plc	16,043	370	43	16,449	360	46	15,855	350	45	13,575	300	45
Taylor Wimpey	14,541	287	51	14,933	256	58	15,520	250	62	9,799	240	40
Bellway	9,644	230	42	10,307	247	42	10,892	268	41	7,522	224	33
Vistry Group	3,645	92	40	3,759	87	43	3,867	128	30	6,131	179	34
Berkeley	3,905	58	67	3,536	62	57	3,698	69	54	3,158	70	45
Countryside*	3,389	47	72	4,295	53	81	5,733	56	102	4,053	63	64
Crest Nicholson	2,935	51	58	3,020	55	55	2,912	59	49	2,247	63	35
Redrow***	5,416	132	41	5,913	132	45	6,443	126	51	4,032	110	37
Linden Homes /Galliford Try Partnerships**	3,296	77	43	3,442	85	40	3,229	80	40	n/a	n/a	n/a
Total	80,209	1,710	-	83,233	1,705	-	86,005	1,756	-	63,121	1,615	-
Average	**-**	**-**	**50**	**-**	**-**	**51**	**-**	**-**	**52**	**-**	**-**	**39**

* acquired by Vistry in 2022
** acquired by Vistry in 2020
***acquired by Barratt in 2024

House Builder	2021: Completions	2021: Sales Outlets	2021: Average per outlet	2022: Completions	2022: Sales Outlets	2022: Average per outlet	2023: Completions	2023: Sales Outlets	2023: Average per outlet	2024: Completions	2024: Sales Outlets	2024: Average per outlet
Barratt Developments	17,234	343	50	17,908	332	54	17,206	367	47	14,004	346	40
Persimmon Plc	14,551	285	51	14,868	272	55	9,922	266	37	10,664	270	39
Taylor Wimpey	14,302	225	64	14,154	232	61	10,848	238	46	10,593	216	49
Bellway	10,138	270	38	11,198	242	46	10,945	238	46	7,654	245	31
Vistry Group	8,639	143	60	11,951	142	84	16,118	185	87	17,225	367	46
Berkeley	3,254	67	49	4,632	60	77	4,637	51	91	3,927	51	77
Countryside*	5,385	61	88	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Crest Nicholson	2407	59	41	2734	54	51	2020	47	43	1,873	44	42
Redrow***	5620	117	48	5715	111	51	5436	117	46	n/a	n/a	n/a
Linden Homes /Galliford Try Partnerships**	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total	49,745	942	-	83,160	1445	-	77,132	1,509	-	65,940	1,539	-
Average	**-**	**-**	**54**	**-**	**-**	**60**	**-**	**-**	**55**	**-**	**-**	**46**

* acquired by Vistry in 2022
** acquired by Vistry in 2020
***acquired by Barratt in 2024

Appendix B Historic windfall completions in Greater Cambridge 2006/07 to 2023/24

Year	Cambridge: windfall sites excluding gardens	Cambridge: windfall sites including gardens	South Cambs: windfall sites excluding gardens	South Cambs: windfall sites including gardens	Greater Cambridge: windfall sites excluding gardens	Greater Cambridge: windfall sites including gardens
2006-2007	256	285	170	235	426	520
2007-2008	346	363	471	537	817	900
2008-2009	404	418	170	217	574	635
2009-2010	73	124	265	305	338	429
2010-2011	188	209	218	277	406	486
2011-2012	150	185	200	220	350	405
2012-2013	152	165	77	116	229	281
2013-2014	545	563	321	375	866	938
2014-2015	174	196	319	350	493	546
2015-2016	240	274	229	287	469	561
2016-2017	258	279	198	241	456	520
2017-2018	156	195	142	175	298	370
2018-2019	227	245	132	180	359	425
2019-2020	169	186	216	262	385	448
2020-2021	124	135	145	181	269	316
2021-2022	277	288	133	165	410	453
2022-2023	268	275	153	190	421	465
2023-2024	75	98	177	190	252	288
Total	**4,082**	**4,483**	**3,736**	**4,503**	**7,818**	**8,986**
Average 2006-2024	**227**	**249**	**208**	**250**	**434**	**499**
Average excluding highest and lowest two years	**213**	**234**	**195**	**236**	**404**	**470**

Appendix C Trajectories for the two new options 9a and 10a

Please Note: The assumptions, figures and tables in this appendix represent theoretical models for distribution based on the differing spatial scenarios and emerging housing requirement being tested by the Councils and their appointed consultants (for the sole purpose of testing the implications of differing options). They do not represent draft policy of the Councils or preferred strategies. In addition, AECOM has applied their own assumptions to help produce visual outputs for illustrative purposes only.

Option 9a

Summary of option

The development strategy is a hybrid strategy to meet a variety of needs, focusing growth at a range of locations including in particular Cambridge urban area, edge of Cambridge non-Green Belt, around Cambourne, and at an additional new settlement.

Broad areas to include:

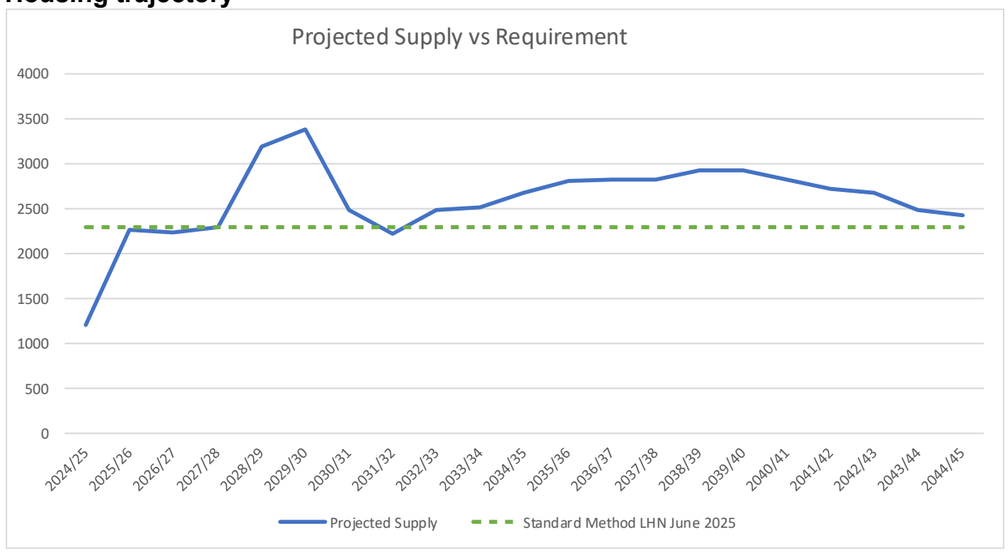
- Cambridge urban area
  - North East Cambridge (delivery by 2045 assumption)
  - North West Cambridge (densification of existing planned built up area)
  - Small sites within Cambridge urban area - limited amount of development relating to actual capacity
- Edge of Cambridge non-Green Belt
  - Cambridge Airport (initial phase post 2030, outside Green Belt, delivery by 2045 assumption)
- Western Cluster (focus on transport node)
  - Expanded Cambourne (delivery by 2045 assumption)
- New settlements on public transport corridors
  - Additional new settlement (delivery by 2045 assumption)
- Southern Cluster (integrating jobs and homes)
  - Southern cluster villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access
- Dispersal to villages
  - Rest of rural area villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access

Table 6-1. Option 9a trajectory

Source	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Total in Plan Period
GCSP Baseline Trajectory	1,213	2,276	2,239	2,292	3,191	3,385	2,490	2,219	1,950	1,843	1,712	1,545	1,475	1,373	1,275	1,275	1,275	1,275	1,275	1,143	1,125	37,846
North East Cambridge	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950
North West Cambridge (Eddington densification)	0	0	0	0	0	0	0	0	250	250	250	250	250	250	350	250	150	100	100	50	0	2,500
Cambridge East (airport)	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950
Cambourne (expansion)	0	0	0	0	0	0	0	0	0	0	50	100	150	200	250	300	300	300	300	300	300	2,550
Garages between 20 St. Matthews Street and Blue Moon Public House, Cambridge	0	0	0	0	0	0	0	0	12	0	0	0	0	0	0	0	0	0	0	0	0	12
Land between Hinton Way and Mingle Lane, Great Shelford	0	0	0	0	0	0	0	0	40	40	30	15	0	0	0	0	0	0	0	0	0	125
Land at Maarnford Farm, Hunts Road, Duxford	0	0	0	0	0	0	0	0	40	20	0	0	0	0	0	0	0	0	0	0	0	60
The Moor, Moor Lane, Melbourn	0	0	0	0	0	0	0	0	20	0	0	0	0	0	0	0	0	0	0	0	0	20
Land at Highfields (phase 2) , Caldecote	0	0	0	0	0	0	0	0	40	24	0	0	0	0	0	0	0	0	0	0	0	64
Land at Mansel Farm, Station Road, Oakington	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Land to the west of Cambridge Road, Melbourn	0	0	0	0	0	0	0	0	40	40	40	0	0	0	0	0	0	0	0	0	0	120
New New Settlement (south east of Cambridge)	0	0	0	0	0	0	0	0	0	0	50	100	150	200	250	300	300	300	300	300	300	2,550
Cambridge Biomedical Campus	0	0	0	0	0	0	0	0	0	0	50	100	100	100	100	100	100	50	0	0	0	700
Total (Completions and supply)	1213	2276	2239	2292	3191	3385	2490	2219	2492	2517	2682	2810	2825	2823	2925	2925	2825	2725	2675	2493	2425	54,447
Standard Method LHN	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	48195
Comparison against Standard Method	-1082	-19	-56	-3	896	1090	195	-76	197	222	387	515	530	528	630	630	530	430	380	198	130	6252
Cumulative delivery	1213	3489	5728	8020	11211	14596	17086	19305	21797	24314	26996	29806	32631	35454	38379	41304	44129	46854	49529	52022	54447	54447
Cumulative requirement (Standard Method)	2295	4590	6885	9180	11475	13770	16065	18360	20655	22950	25245	27540	29835	32130	34425	36720	39015	41310	43605	45900	48195	48195
Rolling five year housing land supply (5% buffer)	-	-	-	-	5.19	5.32	5.54	5.79	6.03	6.29	6.62	7.01	7.41	7.80	8.22	8.64	9.08	-	-	-	-	-

Source: GCSP data, AECOM calculations

Housing trajectory



Five-year housing land supply calculation for 2028/29 to 2032/33 using Sedgefield method and with a 5% buffer

Component	Step	Calculation	Number
(a)	Requirement from start of plan period (1st April 2024) up to 31st March 2028	2295 dpa x 4	9180.0
(b)	Forecast completions from start of plan period (1st April 2024) up to 31st March 2028		8020.0
(c)	Shortfall/Surplus*	(a) - (b)	1160.0
(d)	5 year requirement + Shortfall/Surplus	(2295 x 5) + (c)	12635.0
(e)	Add 5% buffer	(d) x 1.05	13266.8
(f)	Annual target	(e) / 5 years	2653.4
(g)	Supply within 5 year period		13777.0
(h)	**Land supply**	**(g) / (f)**	**5.19**
(i)	Deficit / surplus	(g) - (e)	510

Commentary

Factor	Commentary
Ability to deliver new homes	Additional supply in the mid-latter part of the plan period will enable delivery against the standard method housing requirement. The Cambridge urban area, southern cluster and village sites are anticipated to deliver from plan adoption onwards into the middle of the plan period before the longer-term North East Cambridge, Cambridge Airport, Cambourne and 'new' new settlement sites would be delivered. The option would enable the requirement to be met throughout the plan period after plan adoption apart from minor under-delivery in 2031/32. The supply is anticipated to deliver 13% more dwellings than the housing requirement over the plan period (on AECOM assumptions), i.e. a 'headroom' of 13%.
Stepped housing requirement	A stepped housing requirement is not necessary to demonstrate a five-year housing land supply at plan adoption.
Market absorption including competition from similar sites	Cambridge Urban Area and urban extension sites would provide greater choice in the market throughout the plan period providing smaller units in a high demand location to complement the committed strategic sites, increasing market absorption. If Cambridge Airport, North West Cambridge and North East Cambridge were delivered concurrently it may result in a degree of competition, however there is considerable scope to ensure that the sites are sufficiently differentiated in terms of housing type and size to provide sufficient choice in the market. From 2034/35 onwards a considerable proportion of the supply is projected to take place in new settlements (Northstowe peak 300 dpa, Waterbeach peak 300 dpa, Bourn Airfield peak 250 dpa, Cambourne expansion peak 300 dpa) with an additional 'new' new settlement added into the mix. Depending on the location of the 'new' new settlement there is the potential for market absorption issues to arise as around half of all delivery in Greater Cambridge would be in new settlement locations, with Cambridge itself being the highest demand location. This would be mitigated to some extent if the 'new' new settlement were to be in the south east of the plan area away from the other new settlements.
House building capacity	This level of supply is consistently above historic trends, but not significantly so, which should be able to be accommodated by the housebuilding industry following allocations made in an up to date plan. The housing requirement matches housing growth with job growth so there should be sufficient demand for the new housing.
Five year housing land supply	A five-year housing land supply figure of 5.19 years is anticipated at plan adoption with a 5% buffer and using the Sedgefield method, against the standard method housing requirement figure. A 5% buffer has been used on the basis of the anticipated Housing Delivery Test result for Greater Cambridge in the 2027 Housing Delivery Test Measurement (covering the period 2024/25, 2025/26 and 2026/27, anticipated to be published between December 2027 and February 2028), however this will need to be kept under review.
Meeting the small sites requirement	Concentrating development at sites within Cambridge urban area and also allocating sites at villages is likely to yield a number of sites that would meet the NPPF Paragraph 73 definition of "small sites", assisting with meeting the small sites requirement.
Housing Delivery Test	It is anticipated that the Councils will have no consequences from the Housing Delivery Test once the Local Plan is adopted, as the housing requirement is the standard method local housing need, and the housing trajectory anticipates annual housing completions above the housing requirement in most years.

Option 10a

Summary of option

The development strategy is a hybrid strategy to meet a variety of needs, focusing growth at a range of locations including in particular Cambridge urban area, edge of Cambridge non-Green Belt, and non-site specific Green Belt locations.

Broad areas to include:

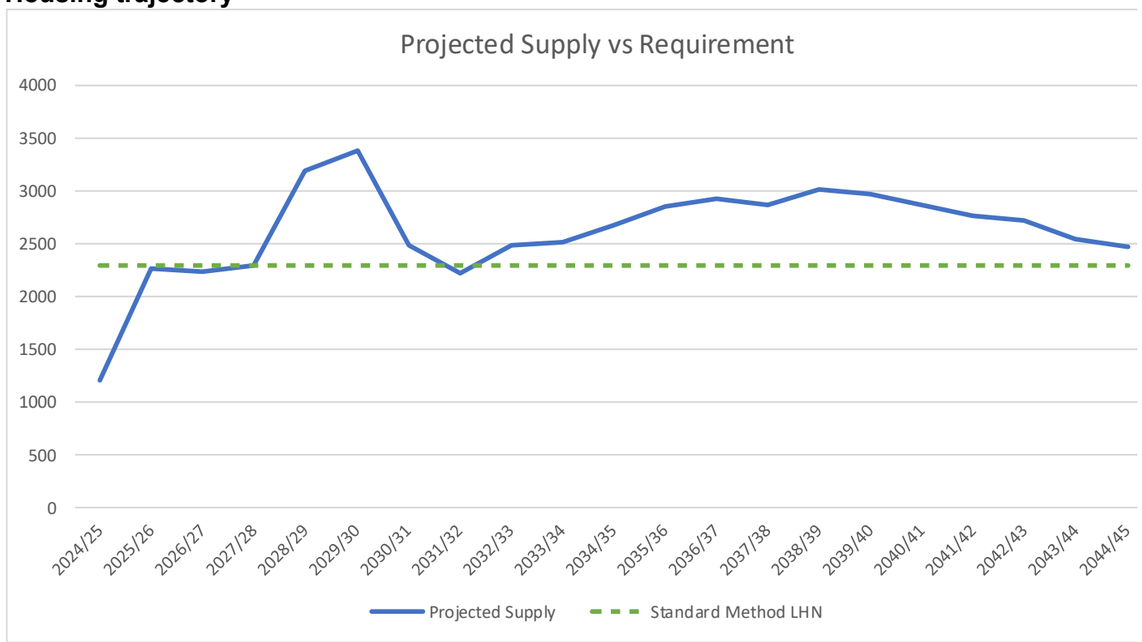
- Cambridge urban area
  - North East Cambridge (delivery by 2045 assumption)
  - North West Cambridge (densification of existing planned built up area)
  - Small sites within Cambridge urban area - limited amount of development relating to actual capacity
- Edge of Cambridge non-Green Belt
  - Cambridge Airport (initial phase post 2030, outside Green Belt, delivery by 2045 assumption)
- Edge of Cambridge Green Belt
  - Edge of Cambridge - Green Belt (equivalent to one or more non-site specific Green Belt location/s)
- Western Cluster (focus on transport node)
  - Expanded Cambourne (delivery by 2045 assumption)
- Southern Cluster (integrating jobs and homes)
  - Southern cluster villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access
- Dispersal to villages
  - Rest of rural area villages - limited development distributed across Rural Centres, Minor Rural Centres, and Group Villages with very good Public Transport Access

Table 6-2. Option 10a trajectory

Source	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Total in Plan Period
GCSP Baseline Trajectory	1,213	2,276	2,239	2,292	3,191	3,385	2,490	2,219	1,950	1,843	1,712	1,545	1,475	1,373	1,275	1,275	1,275	1,275	1,275	1,143	1,125	37,846
North East Cambridge	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950
North West Cambridge (Eddington densification)	0	0	0	0	0	0	0	0	250	250	250	250	250	250	350	250	150	100	100	50	0	2,500
Cambridge East (airport)	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950
Cambourne (expansion)	0	0	0	0	0	0	0	0	0	0	50	100	150	200	250	300	300	300	300	300	300	2,550
Garages between 20 St. Matthews Street and Blue Moon Public House, Cambridge	0	0	0	0	0	0	0	0	12	0	0	0	0	0	0	0	0	0	0	0	0	12
Land between Hinton Way and Mingle Lane, Great Shelford	0	0	0	0	0	0	0	0	40	40	30	15	0	0	0	0	0	0	0	0	0	125
Land at Maarnford Farm, Hunts Road, Duxford	0	0	0	0	0	0	0	0	40	20	0	0	0	0	0	0	0	0	0	0	0	60
The Moor, Moor Lane, Melbourn	0	0	0	0	0	0	0	0	20	0	0	0	0	0	0	0	0	0	0	0	0	20
Land at Highfields (phase 2) , Caldecote	0	0	0	0	0	0	0	0	40	24	0	0	0	0	0	0	0	0	0	0	0	64
Land at Mansel Farm, Station Road, Oakington	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Land to the west of Cambridge Road, Melbourn	0	0	0	0	0	0	0	0	40	40	40	0	0	0	0	0	0	0	0	0	0	120
New New Settlement (south east of Cambridge)	0	0	0	0	0	0	0	0	0	0	50	150	250	250	350	350	350	350	350	350	350	3,150
Cambridge Biomedical Campus	0	0	0	0	0	0	0	0	0	0	50	100	100	100	100	100	100	50	0	0	0	700
Total (Completions and supply)	1213	2276	2239	2292	3191	3385	2490	2219	2492	2517	2682	2860	2925	2873	3025	2975	2875	2775	2725	2543	2475	55,047
Standard Method LHN	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	2295	48195
Comparison against Standard Method	-1082	-19	-56	-3	896	1090	195	-76	197	222	387	565	630	578	730	680	580	480	430	248	180	6852
Cumulative delivery	1213	3489	5728	8020	11211	14596	17086	19305	21797	24314	26996	29856	32781	35654	38679	41654	44529	47304	50029	52572	55047	55047
Cumulative requirement (Standard Method)	2295	4590	6885	9180	11475	13770	16065	18360	20655	22950	25245	27540	29835	32130	34425	36720	39015	41310	43605	45900	48195	48195
Rolling five year housing land supply (5% buffer)	-	-	-	-	5.19	5.32	5.54	5.82	6.09	6.39	6.77	7.18	7.63	8.11	8.61	9.16	9.75	-	-	-	-	-

Source: GCSP data, AECOM calculations

Housing trajectory



Five-year housing land supply calculation for 2028/29 to 2032/33 using Sedgefield method and with a 5% buffer

Component	Step	Calculation	Number
(a)	Requirement from start of plan period (1st April 2024) up to 31st March 2028	2295 dpa x 4	9180.0
(b)	Forecast completions from start of plan period (1st April 2024) up to 31st March 2028		8020.0
(c)	Shortfall/Surplus*	(a) - (b)	1160.0
(d)	5 year requirement + Shortfall/Surplus	(2295 x 5) + (c)	12635.0
(e)	Add 5% buffer	(d) x 1.05	13266.8
(f)	Annual target	(e) / 5 years	2653.4
(g)	Supply within 5 year period		13777.0
(h)	**Land supply**	**(g) / (f)**	**5.19**
(i)	Deficit / surplus	(g) - (e)	510

Commentary

Factor	Commentary
Ability to deliver new homes	Additional supply in the mid-latter part of the plan period will enable delivery against the standard method housing requirement. The Cambridge urban area, southern cluster and village sites are anticipated to deliver from plan adoption onwards into the middle of the plan period before the longer-term North East Cambridge, Cambridge Airport, Cambourne and Green Belt sites would be delivered. The option would enable the requirement to be met throughout the plan period after plan adoption apart from minor under-delivery in 2031/32. The supply is anticipated to deliver 14% more dwellings than the housing requirement over the plan period (on AECOM assumptions), i.e. a 'headroom' of 14%.
Stepped housing requirement	A stepped housing requirement is not necessary to demonstrate a five-year housing land supply at plan adoption.
Market absorption including competition from similar sites	Cambridge Urban Area and urban extension sites would provide greater choice in the market throughout the plan period providing smaller units in a high demand location to complement the committed strategic sites, increasing market absorption. If Cambridge Airport, North West Cambridge, North East Cambridge and any Green Belt sites were delivered concurrently it may result in a degree of competition, however there is considerable scope to ensure that the sites are sufficiently differentiated in terms of housing type and size to provide sufficient choice in the market.
House building capacity	This level of supply is consistently above historic trends, but not significantly so, which should be able to be accommodated by the housebuilding industry following allocations made in an up to date plan. The housing requirement matches housing growth with job growth so there should be sufficient demand for the new housing.
Five year housing land supply	A five-year housing land supply figure of 5.19 years is anticipated at plan adoption with a 5% buffer and using the Sedgefield method, against the standard method housing requirement figure. A 5% buffer has been used on the basis of the anticipated Housing Delivery Test result for Greater Cambridge in the 2027 Housing Delivery Test Measurement (covering the period 2024/25, 2025/26 and 2026/27, anticipated to be published between December 2027 and February 2028), however this will need to be kept under review.
Meeting the small sites requirement	Concentrating development at sites within Cambridge urban area and also allocating sites at villages is likely to yield a number of sites that would meet the NPPF Paragraph 73 definition of "small sites", assisting with meeting the small sites requirement.
Housing Delivery Test	It is anticipated that the Councils will have no consequences from the Housing Delivery Test once the Local Plan is adopted, as the housing requirement is the standard method local housing need, and the housing trajectory anticipates annual housing completions above the housing requirement in most years.

Appendix D Interventions

Potential interventions are listed under the 'PESTEL' framework headings of political, economic, social, technological, environmental or legal interventions.

Political

- **Mayoral and Homes England Powers:** Combined Authorities can negotiate bespoke powers over housing and planning. Homes England also have development corporation-style powers to support large-scale regeneration and housing delivery. These powers include land assembly and compulsory purchase to assemble sites for development. Homes England can, in some scenarios, be granted planning and development control powers in designated areas, allowing it to: prepare and adopt local development plans; grant planning permission for developments; and override local planning decisions in specific regeneration zones. These powers could help to sustain / increase / accelerate delivery in the following ways:
    - Faster Site Delivery: Homes England can fund land promotion, helping councils bring forward more sites quickly.
    - Better Coordination: Mayors can align housing and infrastructure across regions, supporting Local Plan goals.
    - Support for SMEs: Streamlined planning and financial backing help smaller builders contribute to delivery.
    - Affordable Housing Boost: Homes England's funding powers can unlock more affordable homes, aiding council targets.
    - Reduced Planning Risk: Central powers can simplify and standardise planning, making Local Plan implementation more predictable.

> **Example:** The West Midlands Combined Authority (WMCA) uses devolved powers to set housing targets and direct investment into brownfield regeneration. The WMCA is the only region with a direct Land Reform Partnership with the UK Government (as at August 2025). This gives it a say in the disposal of government-owned land (e.g., from Network Rail or the Ministry of Defence), unlocking more brownfield sites for redevelopment. The deal grants the WMCA strategic control over future development, shifting decision-making power from Whitehall to the region. This enables more responsive and locally tailored regeneration efforts.

- **Development Corporations and/or Cambridge Growth Company future growth and delivery vehicle(s):** There are different types available for establishment in Greater Cambridge, including: Urban Development Corporations focused on regenerating urban areas with insufficient private investment (with planning powers and accountable to Ministry of Housing, Communities and Local Government (MHCLG)); Locally Led New Town Development Corporations; and Mayoral Development Corporations (led by the Combined Authority). The Cambridge Growth Company (CGC) and a future Development Corporation could help to sustain / increase / accelerate delivery in the following ways:

- Accelerated Development: Vehicles like the CGC can unlock stalled sites and coordinate infrastructure, speeding up delivery.
- Infrastructure Leadership: Lead on land assembly and major infrastructure, supporting strategic growth.
- Evidence & Investment: Build robust cases for investment and long-term planning.
- Cross-Government Coordination: Help resolve constraints (e.g. water, transport) through central engagement.
- Local Collaboration: Work transparently with councils to align with Local Plans.
- Public Engagement: Enhance legitimacy through structured community involvement.
- Development Corporations can access plan-making and development management powers, collect an Infrastructure Levy, and tailor delivery to local needs—offering councils a powerful tool for large-scale, coordinated growth.

Example: The Ebbsfleet Development Corporation was established in 2015 to speed up the delivery of up to 15,000 homes and create a 21st-century Garden City in Ebbsfleet, North Kent. Ebbsfleet Development Corporation is sponsored by the MHCLG, but works closely with Local Authorities, Kent County Council and wider partners.

- **Homes England as Master Developer:** Homes England has utilised its powers on stalled sites such as Brookleigh in Mid-Sussex. In addition, Homes England has recently formed Joint Ventures with Oaktree Capital/Greycoat Real Estate; and MADE Partnership (Barratt Redrow PLC, Homes England and Lloyds Banking Group) to act as Master Developer on strategic sites. Homes England, acting as Master Developer, could help to sustain / increase / accelerate delivery in the following ways:
  - Unlock Strategic Sites: Acquires and prepares large or stalled sites for phased development.
  - Deliver Infrastructure: Funds roads, utilities, and flood defences essential to Local Plan sites.
  - Enable SMEs: Splits large sites into smaller plots, making land accessible to SME builders.
  - Align with Local Plans: Partners with councils to support local visions and housing targets.
  - De-risk Development: Invests in remediation and infrastructure to make sites viable.
  - Boost Capacity: Provides expertise and delivery support where council resources are limited.

Example: The new partnership of Homes England, Greycoat Real Estate and asset management company Oaktree has announced the purchase of Bourn Airfield. The partnership said it would deliver £115m of investment towards

infrastructure for the development, as part of the proposals to build 3,500 homes at a former World War Two airfield.

Economic

- **CIL / s106 agreements** *:* There are various forms of 'betterment' tax and planning obligations available for use in Greater Cambridge. At present, within Cambridgeshire, only Huntingdonshire District Council and East Cambridgeshire District Council have adopted CIL. Cambridge City Council and South Cambridgeshire District Council both utilise s106 agreements to make development acceptable and fund new infrastructure. The use of CIL could, subject to viability testing, simplify and speed up planning and development in Greater Cambridge. CIL and s106 can help to sustain / increase / accelerate delivery in the following ways:
    - Community Infrastructure Levy (CIL): Provides predictable, tariff-based funding for infrastructure (e.g. schools, transport), based on floorspace. Helps councils plan and pool resources for wider infrastructure needs.
    - Section 106 Agreements (s106): Site-specific legal agreements that secure affordable housing, open space, education, and transport improvements. Tailored to mitigate direct impacts of development. CIL and s106 charging schedules and planning obligations guidance documents can be kept up to date in alignment with a Council's Infrastructure Delivery Plan.
    - Tariffs: Standardised charges (e.g. per dwelling) can simplify negotiations and ensure consistent contributions toward infrastructure.

Example: In February 2019 the London Mayor adopted a new charging schedule (MCIL2). The new charges took effect on 1 April 2019 and supersede the MCIL1 charging schedule and the associated Crossrail Funding SPG (applicable in central London, the northern part of the Isle of Dogs and within 1km of a Crossrail station for the rest of London). The MCIL2 charges apply to all planning permissions granted from 1 April 2019 and may also apply to some phased planning permissions granted before 1 April 2019. MCIL will be used to repay Elizabeth Line financing.

Example: In 2007 a tariff-based system of infrastructure funding was agreed in the 'expansion areas' of Milton Keynes (in areas such as the Western Expansion Area [now Fairfield and Whitehouse], the Eastern Expansion Area [Broughton Gate and Brooklands], Tattenhoe Park, Kingsmead South, and parts of the Strategic Land Allocation [Eagle Farm and Glebe Farm]). The tariff secured a commitment from landowners and developers within these areas (where up to 15,000 homes were planned) to s106 contributions in excess of £310m (at 2007 values), based on a standard tariff charged for each home and/or each square metre of employment floor space. This tariff is a unique, Treasury backed approach to infrastructure delivery, which secured £30m of forward funding for the delivery of roads, education, health, community services, parks and attracting inward investment, amongst a range of projects.

- **Prudential Borrowing aligned with new Local Plan:** Under the Local Government Act 2003, councils in England can borrow to fund capital expenditure (e.g., housing, infrastructure) as long as it is: affordable; prudent; and

sustainable. This is governed by the Prudential Code, which allows councils to: borrow from the Public Works Loan Board (PWLB) or other sources; fund housing development, especially where it supports regeneration and / or economic growth; and use capital receipts and / or internal borrowing to reduce reliance on external debt. However, councils cannot borrow to fund revenue spending, and must ensure that debt repayments do not place unsustainable pressure on their budgets. Prudential borrowing could help to sustain / increase / accelerate delivery in the following ways:

- Fund Infrastructure: Enables upfront investment in transport, schools, utilities.
- Unlock Sites: Can make allocated sites viable by bridging infrastructure gaps.
- Flexible Finance: Councils borrow within local affordability limits.
- Speed Up Delivery: Reduces reliance on developer contributions.
- Support Place-Making: Investment in regeneration and public realm aligned with Local Plan goals.

Example: Calderdale Council planned to use prudential borrowing to fund over £50 million worth of infrastructure needed to support the development of two major Garden Suburbs. These suburbs are key to meeting the borough's housing targets. The borrowing was necessary to:

- Deliver infrastructure (e.g., roads, schools) early in the Local Plan period.
- Ensure housing delivery could proceed at a steady pace.
- Manage cash flow and reduce the financial burden on developers and landowners.

The council planned to recover the investment through developer contributions and other funding mechanisms, ensuring long-term financial sustainability.

- **Wellbeing Powers deployed to support Local Plan priorities:** Under the Local Government Act 2000 and later the General Power of Competence (Localism Act 2011), councils can act to promote: economic; social; and / or environmental wellbeing. These powers allow councils to: justify housing development as a means to improve community wellbeing; support affordable housing, mixed-use developments, or regeneration schemes; and / or partner with housing associations or developers using land, funding, or planning powers. Wellbeing Powers could help to sustain / increase / accelerate delivery in the following ways:
  - Health-Driven Planning: Councils can use wellbeing powers to shape healthier neighbourhoods through planning decisions that promote physical activity, access to green space, and social connectivity.
  - Cross-Sector Integration: Enables councils to align housing, transport, public health, and regeneration strategies with Local Plan priorities.
  - Tackle Inequalities: Supports long-term action to reduce health disparities by improving living conditions in deprived areas.

- Empower Prevention: Shifts focus from reactive services to proactive place-making that improves wellbeing and reduces future demand on health services.
- Flexible Local Leadership: Councils can tailor wellbeing initiatives to local needs, using existing powers creatively to support strategic growth.

Examples: Some Councils have used the general power of competence to set up arms-length development companies (e.g., Newham's Populo Living). These schemes can be used to deliver mixed-tenure housing schemes that cross-subsidise affordable housing.

- **Direct Delivery:** The Councils are already delivering via direct delivery and there may be opportunities to expand their activities in this area i.e. acting as developers through Housing Revenue Accounts (HRAs) or Local Housing Companies (e.g., council-owned arms-length companies). Rolling out the Cambridge Investment Partnership (CIP), South Cambridgeshire Investment Partnership (SCIP) and This Land approach to more sites in Council areas/County/Homes England landholdings and exploring further innovative models of delivery (e.g. supporting self-build, custom build, Modern Methods of Construction (MMC), Community Land Trusts (CLTs) etc.). Models available in this space include: Local Housing Companies; Local Development Companies; and Local Authority Trading Companies (LATCs). LATCs are council-owned or jointly owned companies created to deliver regeneration, housing, or commercial development. These models are often deployed to: act as master developers; assemble land; partner with private developers; and reinvest profits into local priorities. Joint Ventures and Special Purpose Vehicles can also be used to partner with private developers or housing associations to share risk and finance e.g. Public-Private Partnerships (PPPs) and Local Asset Backed Vehicles. Councils may enter into joint ventures with private developers or investors to share risk and resources in delivering large-scale developments. Direct delivery could help to sustain / increase / accelerate delivery in the following ways:
    - Guaranteed Delivery: Councils can ensure homes are built on time, unlike private developers who may delay due to market risks.
    - Targeted Provision: Enables delivery of housing types and tenures that meet real local needs, including affordable and specialist homes.
    - Use of Council Land: Unlocks publicly owned land for development, supporting Local Plan allocations/objectives/targets.
    - Flexible Delivery Models: Councils can use housing companies, joint ventures, or partnerships with Homes England to deliver public sector-led homes delivery.
    - Catalyst for Private Investment: Demonstrates demand and viability, encouraging private developers to follow.
    - Place-Making & Regeneration: Supports wider regeneration goals, improving social outcomes and aligning with Local Plan priorities.

Example: Dacorum Borough Council's 2025 HRA Business Plan outlines investments in new housing developments to meet local demand. Epping Forest

Council highlight how use of Right to Buy receipts, borrowing, and grants from Homes England can support new housing developments.

Example: I4B is Brent Council's wholly owned housing company. It was set up in November 2016 to provide affordable, good quality homes to help reduce homelessness. Its main aim is to increase its contribution to the Council's ambition of creating a borough with "a future built for everyone, an economy fit for all". I4B owns and manages a number of Private Rented Sector (PRS) properties.

- **Public Land Disposal:** Councils and Homes England can release surplus public land for housing, often at below-market rates to support affordable housing. The two Council's estates departments could follow this approach for land in public ownership that is not included as part of Joint Ventures. Public land disposals (perhaps leveraging innovative digital platforms) could help to sustain / increase / accelerate delivery in the following ways:
    - Unlock Sites: Releases surplus land to meet housing and regeneration targets.
    - Support Local Goals: Aligns disposal with Local Plan priorities like housing or employment.
    - Enable SMEs: Smaller plots support diverse delivery and potentially quicker build-out.
    - Raise Funds: Generates capital for reinvestment in services and / or infrastructure.
    - Improve Use: Frees up underused assets for productive development.
    - Legal Flexibility: Planning powers allow disposal to secure best use or outcomes.

Example: Homes England utilise a digital platform, The Land Hub, as an interactive map that features sites they intend to sell within the next 6 months.

- **Grant Funding:** Administering or bidding for funds like the Affordable Homes Programme, Brownfield Land Release Fund, and/or Housing Infrastructure Fund to help accelerate or unlock the delivery of housing. Homes England's Strategic Partnerships are another form of funding providing long-term funding deals with housing associations to deliver thousands of affordable homes. Working with Homes England to secure funding to increase affordable housing supply. Directing resources to lever in grant funding could help to sustain / increase / accelerate delivery in the following ways:
    - Unlock Delivery: Provides upfront capital to make sites viable, especially for affordable housing and infrastructure.
    - Boost Affordable Housing: Strategic partnerships fund long-term affordable housing programmes, giving councils confidence in meeting Local Plan targets.
    - Flexible Multi-Year Support: Enables councils and partners to plan delivery over several years with certainty.
    - Encourage Innovation: Supports Modern Methods of Construction (MMC) and sustainability, aligning with future-proofed Local Plan goals.

- Engage SMEs: Funding agreements often require collaboration with smaller builders, diversifying delivery.

Example: HIF was used by Oxfordshire County Council to fund roads and utilities that unlock housing sites.

- **Multi-utility services company (MuSCo's) and Energy Service Company (ESCOs):** Council-owned or affiliated companies that deliver a range of local services, often including housing, maintenance, and community services. They are designed to retain control and reinvest profits locally. ESCOs are formed to deliver energy efficiency and renewable energy projects. Councils may establish or partner with ESCOs to: retrofit buildings; install district heating systems; and/or improve energy performance in public and private housing. MuSCOs and ESCOs can finance, build, and operate energy infrastructure (like district heating, solar PV, or battery storage) for new housing developments. A MuSCO can install a district heating network in a new housing estate, removing the need for each home to have its own boiler. This reduces capital costs for developers and simplifies planning. MuSCOs can streamline the planning process by offering pre-approved, compliant energy solutions that align with local authority climate action plans. A local authority MuSCO could offer a "plug-and-play" energy package for developers that meets local planning requirements, speeding up approvals. MuSCO's and ESCO's could help to sustain / increase / accelerate delivery in the following ways:
    - Integrated Utilities: Deliver energy, water, and waste via one provider offering efficiencies.
    - Local Energy Control: Manage supply locally to cut costs and boost sustainability with less reliance on statutory undertakers.
    - Boost Local Economy: Lower energy costs support businesses and regeneration efforts.
    - Flexible Models: Councils can own or partner in ventures tailored to local needs.
    - Sustain Long-Term Delivery: Revenue from services can fund ongoing infrastructure and community investment. Which in turn can help to tackle fuel poverty (by offering fair tariffs and reinvesting profits into communities) and support Net Zero efforts (enabling low-carbon infrastructure investment aligned with climate goals).

Example: Several Councils have used MuSCO-style models to coordinate utility infrastructure across multiple developments. By aggregating demand and planning infrastructure centrally, they reduced duplication, improved efficiency, and accelerated housing delivery.

- **Rolling Infrastructure Funds:** These are revolving funds used to finance upfront infrastructure (e.g., roads, schools, utilities) needed to unlock development. They are typically funded by government grants, borrowing, or developer contributions. They are then repaid over time through developer tariffs, land value capture, or business rates. This enables councils to forward-fund infrastructure, bridging any infrastructure funding gap and thus help accelerate delivery. As funds are repaid, they can be recycled into new projects, creating a sustainable funding

mechanism that supports ongoing housing delivery. A rolling infrastructure fund could help to sustain / increase / accelerate delivery in the following ways:

- Early Investment: Provide upfront capital for infrastructure to unlock sites.
- Revolving Finance: Repaid over time, enabling reinvestment in future projects.
- Faster Delivery: Help bring forward sites delayed by infrastructure gaps.
- Leverage Investment: Attract co-funding from long-term investors.
- Support Growth: Fund transport, utilities, and digital infrastructure.
- Sustainability: Create a self-renewing source for long-term place-making finance.

Example: The UK Infrastructure Bank (UKIB) provided a £300 million rolling infrastructure facility to Transport for London (TfL) to support the Docklands Light Railway (DLR) Rolling Stock Replacement Programme. This investment was designed not only to modernise transport but also to unlock housing development in some of London's most deprived communities.

- **Tax Incentives and Reliefs:** Councils have some flexibility to provide Council Tax discounts or exemptions for new builds, empty homes brought back into use, or affordable housing projects. Additionally, councils can reduce or waive Community Infrastructure Levy (CIL) charges and negotiate s106 agreements to lower developer contributions in exchange for affordable housing or faster delivery. Local authorities can use discretionary reliefs and council tax policies to: encourage specific types of development (e.g., affordable housing, student accommodation); and support regeneration efforts that include residential components. Business rate relief, such as Improvement Relief, can encourage developers to invest in mixed-use developments that include both commercial and residential components. Enterprise Zones and LDOs can also be used to offer business rate discounts, other tax incentives and reduced planning obligations. If residential development is part of a broader regeneration strategy in such zones, the incentives can: attract businesses and jobs, increasing demand for nearby housing; and improve infrastructure and amenities, making residential development more attractive. Tax incentives and reliefs could help to sustain / increase / accelerate delivery in the following ways:
    - Encourage Development: Reliefs can attract investment to priority areas.
    - Support Growth Goals: Incentives tied to jobs or regeneration can aid Local Plan delivery.
    - Improve Affordability: Council tax reliefs help low-income households and new business start-ups.
    - Enable Local Control: Councils can tailor exemptions to local needs/regeneration priorities.
    - Boost Revenues: Activity-linked incentives offer more stable funding.
    - Sustain Projects: Reliefs can support long-term viability of housing and infrastructure.

Example: The West Midlands Combined Authority (WMCA) has been granted full retention of business rates for 10 years, worth approximately £450 million. This fiscal autonomy allows the WMCA to reinvest in regeneration and infrastructure projects, making brownfield sites more viable for development. The WMCA also has up to six 'Levelling Up Zones', each backed by 25-year business rate retention. These zones are targeted for investment and regeneration, particularly focusing on brownfield land.

- **Strategic Sites/New Communities Developer Forum and place marketing:** A specific forum to discuss supply and market issues with developers and partners. Work with landowners and developers to stimulate market interest. Regular discussions with landowners and developers to monitor progress and identify solutions. Attendance at development sector conferences and events to market the area to potential investors. In addition, place marketing and promotion can assist in attracting inward investment and developer interest. Forums and place marketing could help to sustain / increase / accelerate delivery in the following ways:
    - Coordinate Delivery: Forums bring together councils, developers, and stakeholders to align infrastructure, phasing, and design across strategic sites.
    - Strengthen Partnerships: Early and ongoing collaboration improves trust, reduces risk, and supports consistent delivery.
    - Promote Quality & Vision: Forums help maintain design standards and ensure developments reflect Local Plan aspirations.
    - Boost Community Engagement: Place marketing builds local support and attracts future residents and businesses.
    - Accelerate Planning: Shared evidence and coordinated promotion improve chances of timely allocation and consent.
    - Sustain Growth: Forums and marketing help maintain momentum and visibility for long-term strategic sites.

Example: The TCPA New Communities Group (NCG) was established in 2009. Its members are ambitious local authorities and development corporations planning and delivering exemplary large-scale new communities, from Garden City inspired new towns and villages to urban regeneration and extension schemes. Homes England works closely with the Group.

- **Development Viability:** Take a pragmatic approach to viability issues on strategic sites, exploring alternative ways to deliver affordable housing and infrastructure (using some of the examples above). Adopting a flexible approach to viability at the development management stage could help to sustain / increase / accelerate delivery in the following ways:
    - Flexible Delivery: Taking a pragmatic approach allows councils to adjust affordable housing and infrastructure requirements to reflect site-specific viability challenges.
    - Unlock Strategic Sites: Viability flexibility helps bring forward large or complex sites that might otherwise stall.

- Collaborative Planning: Early engagement with developers and infrastructure providers improves cost certainty and delivery confidence.
- Sustainability: Viability-led strategies can help to support long-term place-making and infrastructure investment where there are known challenges and / or abnormal costs.

Example: Blackpool Council's Affordable Housing SPD allows for off-site provision or financial contributions where on-site delivery is not viable. This approach supports regeneration and mixed-income communities while maintaining flexibility for developers. In the Foxhall Village scheme, the council took ownership of a stalled site and used government grant funding to resume delivery of nearly 350 affordable homes, including shared ownership and affordable rent, across multiple phases.

Social

- **Neighbourhood Planning***:* Neighbourhood Development Plans, Neighbourhood Development Orders, Community Right to Build Orders and Assets of Community Value can be used to deliver additional housing. Qualifying bodies can therefore provide additional housing supply outside of that anticipated through the Local Plan. Related to this, using Citizens' Assemblies, or community engagement to shape development in line with local needs may speed up the early phases of a development project and result in less objections and legal proceedings. Involving local communities in early place-shaping activities can help to build support for new housing. Neighbourhood planning can help to sustain / increase / accelerate delivery in the following ways:
  - Local-Led Housing Delivery: Neighbourhood Development Plans (NDPs) can allocate sites and set housing policies that support Local Plan targets.
  - Faster Permissions: Development Orders and Right to Build Orders streamline approval for small-scale housing.
  - Boost Engagement: Increases public support and reduces opposition to new homes.
  - Complement Local Plans: Neighbourhood plans work within the statutory framework to help deliver housing in locally supported ways.
- **Tenure and Housing Product Diversification:** Supporting a mix of tenures - social rent, shared ownership, Build to Rent - to meet diverse needs and mitigate market absorption risks. Supporting a mix of house and apartment types, including Build to Rent, Older Peoples Housing, Student Accommodation and other specialist housing can help to increase development outlets and delivery rates. Tenure and product diversification can help to sustain / increase / accelerate delivery in the following ways:
  - Wider Market Reach: Offering a mix of tenures (e.g. affordable rent, shared ownership, Build to Rent, market sale) attracts a broader range of buyers/renters, increasing absorption rates and speeding up delivery.
  - Resilience to Market Fluctuations: Diversified products (e.g. family homes, apartments, co-living) reduce reliance on a single market segment, helping maintain delivery during downturns.

- Support for Local Needs: Councils can better meet identified housing needs—such as key worker housing, older persons' accommodation, or entry-level homes—aligned with Local Plan evidence.
- Boost SME Participation: Varied housing types and tenures create opportunities for smaller builders and specialist providers, supporting a more diverse delivery ecosystem.
- Enable Phased Delivery: Mixed-tenure schemes allow for faster build-out and phased occupation, helping councils meet five-year housing land supply targets.
- Enhance Place-Making: A blend of tenures and housing types supports inclusive, balanced communities, contributing to Local Plan sustainability and social objectives.

Examples: Leeds Community Homes and Bristol Community Land Trust are supported by the councils to deliver homes shaped by local residents.

Technological

- **Digital Planning Tools:** The Councils are already utilising digital planning tools, however there remain additional tools that could be incorporated to help speed up the planning and delivery process for officers and applicants. For example, this could include: using publicly accessible GIS; 3D modelling and digital twins to improve site identification; digital masterplanning; and / or online and interactive platforms for monitoring and public engagement. In some areas there may be benefits to partnering with Universities or PropTech companies to test emerging technologies aimed at streamlining planning processes or improving the management of housing delivery. Digital planning tools and innovation could help to sustain / increase / accelerate delivery in the following ways:
    - Faster Decision-Making: Digital tools streamline application processing, reducing delays and improving housing delivery timelines.
    - Improved Site Identification: GIS and data platforms help councils identify suitable land for development, supporting Local Plan allocations.
    - Enhanced Public Engagement: Interactive platforms and visualisations make consultations more accessible, increasing support for housing proposals.
    - Smarter Viability Assessment: PropTech tools model costs, values, and delivery scenarios, helping councils take informed, pragmatic decisions.
    - Real-Time Monitoring: Dashboards track delivery against Local Plan targets, enabling proactive intervention.
    - Boost Transparency & Trust: Open data and digital mapping improve clarity for developers and communities, supporting smoother implementation.

Examples: Planning London Datahub, a digital platform aggregating planning data across London boroughs to improve transparency and decision-making; and Milton Keynes Digital IDP.

- **Modern Methods of Construction (MMC):** Supporting modular and off-site construction through policy, procurement or land deals. This method improves speed, quality, and sustainability by allowing simultaneous factory and site work, reducing delays and waste. Homes England has backed modular housing firms to deliver faster, factory-built homes. MMC could help to sustain / increase / accelerate delivery in the following ways:
    - Faster delivery: Up to 30% quicker build times than traditional methods.
    - Cost-effective: Potential savings of up to 25% per unit.
    - Addresses skills shortages: Shifts labour to factory settings, easing site-based workforce demands.
    - Supports sustainability: Better energy efficiency aligns with net zero and Future Homes Standard.
    - Scalable for social housing: Thousands of homes already delivered via MMC for councils and housing associations.
    - Unlocks difficult sites: Lightweight construction enables use of constrained or brownfield land.
    - Minimises disruption: Shorter on-site build times reduce impact on communities.

Example: Ten Degrees project in Croydon, London, where two high-rise towers were built using modular construction. Over 1,500 pre-fabricated modules were manufactured off-site and assembled on-site, cutting build time by 40% and delivering 546 homes in just 24 months.

Environmental

- **Brownfield Land Reuse:** Prioritising redevelopment of previously used land to protect greenfield sites. Brownfield Register: regularly updating the register and enabling the use of the permission in principle mechanism. Brownfield Land Release Funds: Brownfield Land Funding can assist with de-risking, site assembly and site preparation inc. demolition and preparing sites for development/sale. Proposals for Brownfield Passports could also assist, subject to confirmation of how this new tool shall be implemented. Brownfield Registers and Brownfield Passports could help to sustain / increase / accelerate delivery in the following ways:

  Brownfield Register
    - Identifies developable land: Lists previously used sites suitable for housing, helping councils meet Local Plan targets.
    - Supports funding bids: Inclusion can unlock access to government schemes like the Brownfield Land Release Fund.
    - Encourages small site delivery: Helps bring forward underutilised plots, especially in urban areas.
    - Improves transparency: Public data helps developers and communities understand housing opportunities.
    - Aids plan-making: Provides evidence base for site allocations and housing land supply.

Brownfield Passport

- Simplifies planning: Offers pre-agreed development parameters for brownfield sites, reducing delays.
- Boosts SME involvement: Lower risk and clearer rules encourage smaller builders to participate.
- Promotes quality and density: Encourages design-led, higher-density development in sustainable locations.
- Aligns with national priorities: Supports brownfield-first approach in planning policy and housing delivery.
- Retains local control: Councils still manage site-specific considerations and community engagement.

Examples: Councils like Liverpool and Wolverhampton have received funding to unlock derelict land for housing on brownfield land.

- **Biodiversity Net Gain (BNG) and Ecosystem Services:** Local authorities are preparing for mandatory requirements by mapping habitats and setting local policies. There is also the opportunity for Councils to take this further and adopt an ecosystem services approach. BNG requires developers to leave biodiversity in a measurably better state than before development, using a statutory biodiversity metric. Councils can: link biodiversity units to ecosystem services (e.g., flood mitigation, air purification, pollination); encourage developers to prioritise habitats that deliver multiple ecosystem benefits; and use natural capital accounting to demonstrate the economic value of these services. Councils can: act as brokers or facilitators of local BNG markets; use rolling infrastructure or green investment funds to forward-fund habitat creation; and/or partner with landowners to generate and sell biodiversity units, reinvesting profits into local nature projects. Thus helping to facilitate housing and reinforce local ecosystems. BNG and Ecosystem Services schemes could help to sustain / increase / accelerate delivery in the following ways:

  Biodiversity Net Gain (BNG)

  - Improves public acceptance: Visible environmental benefits (e.g. habitat creation, green corridors) can reduce opposition to new developments.
  - Unlocks sites: BNG strategies can make ecologically sensitive or marginal sites viable for development.
  - Speeds up planning: Clear BNG frameworks reduce delays by setting predictable requirements.
  - Enhances placemaking: Nature-rich environments improve marketability and long-term community support.
  - Supports funding access: BNG-aligned projects may qualify for environmental or infrastructure grants.

  Ecosystem Services Initiatives

  - Boosts community support: Projects that deliver public goods (e.g. flood mitigation, air quality, recreation) are more likely to gain local approval.

- Improves land value and viability: Nature-based solutions can reduce infrastructure costs (e.g. sustainable drainage) and enhance site attractiveness.
- Enables multi-benefit planning: Integrating housing with green infrastructure helps meet multiple policy goals, streamlining Local Plan delivery.
- Supports strategic growth: Ecosystem services mapping helps councils identify areas where housing can be delivered alongside environmental gains.

Example: Greater Manchester has developed a strategic framework for BNG that includes: clear guidance for developers; pre-identified areas for off-site and biodiversity enhancements; and integration with local nature recovery strategies. This proactive planning helps reduce protracted pre- application, validation and development management processes.

- **Flood risk management and GIA funding aligned with spatial strategy:** The County Council as Lead Local Flood Authority and Cambridge City Council and South Cambridgeshire District Council as risk management authorities (RMA) may be eligible for grant-in-aid (GIA) funding for locally identified flood and coastal erosion risk management (FCERM) projects (if the project can evidence a robust business case and satisfy the appraisal criteria). There is also the potential to implement a formula-based approach for how flood mitigation and the proportion of s106 and CIL shall be used for flood risk issues and off-site reinforcements akin to how open space assessments and green infrastructure standards provide the required provision and estimated costs. This may also be applicable to matters relating to potable water supply and water re-use. Coordinating flood risk management with a focus on the Local Plan's spatial strategy could help to sustain / increase / accelerate delivery in the following ways:
  - Unlocks developable land: Flood and erosion mitigation makes previously high-risk sites viable for housing.
  - Accelerates delivery: GiA funding enables timely infrastructure that supports housing growth.
  - Improves public support: Resilient design and visible protection measures increase community confidence in new developments.
  - Reduces planning risk: Strategic flood mapping and integrated risk management streamline approvals.
  - Supports climate-resilient growth: Embedding FCERM into Local Plans ensures housing is future-proofed.
  - Targets priority areas: GiA funding prioritises deprived or high-need areas, aligning with housing demand.
  - Enables multi-benefit schemes: Combining flood protection with green infrastructure enhances placemaking and funding eligibility.
  - Reduces local financial burden: Partnership funding models make infrastructure delivery more feasible for councils.

Example: Essex County Council offers an example of how planning obligations guidance, a viability protocol and Design Guide (see 'The Sustainable Drainage Systems Design Guide for Essex') can be implemented together to achieve a consistent approach to infrastructure delivery and catchment-wide schemes. The level of guidance available helps developers to understand the requirements placed upon them and speed up the planning and delivery processes.

Legal

- **Local Development Orders (LDOs):** Simplify planning in designated areas to encourage development. LDOs could help to sustain / increase / accelerate delivery in the following ways:
    - Increase investor confidence: Rules-based certainty reduces planning risk, making sites more attractive to developers.
    - Unlock complex urban sites: LDOs simplify development on fragmented or brownfield land, especially in areas with multiple landowners.
    - Enable targeted growth: Councils can use LDOs to promote housing around strategic transport hubs or regeneration zones.
    - Reduce political resistance: LDOs offer a flexible alternative to changing Local Plan site allocations, easing delivery in sensitive areas. Similarly LDOs are not required to be in alignment with a Local Plan and can offer a means of de-risking a site that is not allocated.
    - Support policy objectives: LDOs can be tailored to promote affordable housing, sustainable design, or specific housing typologies.
    - Streamline delivery: Faster approvals and reduced bureaucracy help councils meet housing targets more efficiently.

Examples: Used by Tees Valley Combined Authority to simplify planning for housing on brownfield sites. Residential-led Local Development Orders – see East Lindsey's Skegness Gateway project (1,000 homes). District-wide Local Development Orders – Swindon has used LDOs for speeding up smaller scale applications.

- **Compulsory Purchase Orders (CPOs):** Government has signalled their intent to implement CPO reform introduced by the Levelling-up and Regeneration Act 2023 to allow the conditional confirmation of CPOs. This will allow the compelling case for use of CPOs to be established earlier in the land assembly process on sites where alternative proposals have been put forward by landowners. The conditional confirmation of CPOs could be used to ensure landowners progress their alternative proposals within certain timescales, which would be made clear when an individual CPO is conditionally confirmed. Where they fail to do so, CPO powers could then be switched on. MHCLG believe the conditional confirmation power will de-risk use of CPOs on stalled sites because the existence of alternative proposals will no longer carry the same weight in the decision-making process. In future the Councils could leverage anticipated updates to Government guidance and legislation to deploy CPO. Use of CPO powers could help to sustain / increase / accelerate delivery in the following ways:
    - Unlock stalled or strategic sites: Enables acquisition of land where owners are unwilling to sell.

- Accelerates regeneration: Facilitates redevelopment of fragmented or derelict urban land.
- Lowers acquisition costs: Reforms allow councils to exclude “hope value,” making affordable housing more viable.
- Speeds up delivery: Councils can initiate CPOs earlier, reducing delays.
- Supports affordable housing: Used to assemble land for social and affordable housing aligned with Local Plan targets.
- Improves public support: Demonstrating public benefit can increase acceptance of housing schemes.
- Empowers councils: New powers reduce reliance on central government approval, enabling faster action.

Example: Birmingham City Council issued CPOs to assemble land needed for the Perry Bar regeneration, particularly where voluntary acquisition was not possible. This enabled the delivery of new residential developments, transport infrastructure upgrades, and public realm improvements.

- **Design Codes and Guides:** Introduced under recent reforms to provide certainty and speed up planning. Design Codes/Guides could help to sustain / increase / accelerate delivery in the following ways:
  - Speed up planning: Clear design expectations reduce delays and negotiation time.
  - Boost public support: Community involvement in code creation increases trust and acceptance.
  - Improve design quality: Attractive, sustainable homes enhance market appeal and long-term value.
  - Guide strategic growth: Help shape development in priority areas aligned with Local Plans.
  - Enable faster delivery: Predictable standards streamline developer processes.
  - Support regeneration: Provide a framework for coherent renewal of estates and brownfield sites.

Examples: Piloted in areas like Uttlesford to provide clear rules for developers and speed up planning. Uttlesford’s Design Code sets out an aspiration for high quality design throughout the district, setting a new standard for development and placemaking.

- **Enforcement Powers:** Addressing land banking, stalled sites, or non-compliance with planning conditions. Planning enforcement powers can accelerate housing delivery in England by holding developers accountable and streamlining the planning process. The introduction of a "Delayed Homes Penalty," which would allow local authorities to fine developers who fall significantly behind agreed build-out schedules may be a useful ‘stick’. Additionally, new transparency measures would require developers to publicly report on their progress, increasing accountability and enabling communities and councils to apply pressure when delivery lags. Local authorities are also being encouraged to

enforce planning conditions more rigorously, ensuring infrastructure and affordable housing commitments are met. Together, these measures aim to reduce delays, increase housing supply, and build public trust in the planning system. Government proposals for a bolstered planning enforcement regime could help to sustain / increase / accelerate delivery in the following ways:

- Protects housing quality: Ensures developments meet approved standards, maintaining public trust and mitigating against scenarios such as the costly demolition and reconstruction of new build properties (where defects are identified e.g. Darwin Green).
- Builds public confidence: Visible enforcement reassures communities, improving acceptance of new housing.
- Prevents harmful precedent: Stops unauthorised development that could undermine Local Plan goals.
- Encourages compliance: Deters breaches and keeps approved schemes on track.
- Supports fair delivery: Ensures consistent rules for all developers, reducing disputes and delays.

Example: The GLA issued guidance encouraging the London boroughs to use planning enforcement and proactive engagement with developers to overcome delivery barriers. This includes fast-tracking planning applications for compliant schemes and applying pressure on developers to meet agreed timelines, especially on strategic sites.

- **Review and streamlining of planning procedures:** Streamlining internal processes for developer contributions to infrastructure projects and validation requirements may help to frontload planning processes and reduce pre-commencement conditions. For planning conditions, consistency and clarity is important to enable the timely discharge of conditions. Measures to streamline planning procedures could help to sustain / increase / accelerate delivery in the following ways:
  - Speeds up approvals: Simplified processes reduce delays, especially for compliant schemes.
  - Boosts developer confidence: Clearer rules encourage investment and faster build-out.
  - Lowers costs: Less bureaucracy means reduced planning and design overheads.
  - Unlocks stalled sites: Easier permitting helps bring forward delayed developments.
  - Supports SMEs: Makes it easier for smaller builders to enter the market.
  - Improves public trust: Transparent systems reduce opposition and build support.
  - Targets growth areas: Tools like pattern books and pre-approved zones guide housing to priority locations.

Example: The Local Government Association (LGA) report titled Speeding Up Delivery (2018) highlights that Milton Keynes and Rugby councils both undertook targeted reforms to accelerate housing delivery by streamlining planning procedures. Milton Keynes focused on early engagement, standardised s106 templates, and dedicated staff to manage obligations, while also using design codes to simplify validation. Rugby Borough Council tackled delays by reducing pre-commencement conditions, implementing a conditions tracker, and improving internal coordination. Together, these measures led to faster planning decisions, more efficient legal agreements, and quicker starts on housing developments.

Appendix E Trajectory for the draft Local Plan

The detailed housing trajectory for the Greater Cambridge Local Plan 2024-2045 is set out overleaf. It is broken down into two categories:

- Table 1: Existing supply (from adopted allocations, sites with planning permission or a resolution to grant planning permission, and the windfall allowance) plus updates from a review of adopted allocations; and
- Table 2: Anticipated delivery from new allocations in the Local Plan 2024-2045.

A sensitivity test is undertaken showing the trajectory with (Table 3a) and without (Table 3b) the North East Cambridge allocation, with the five-year housing land supply calculated for each scenario.

The five-year housing land supply calculations are undertaken on the basis that the plan is adopted in the 2028/29 monitoring year, and therefore the five year period is 1st April 2028 to 30th April 2033.

To determine the buffer to be added to the five year housing land supply calculations at plan adoption, the relevant Housing Delivery Test result is likely to be the 2027 Housing Delivery Test Measurement, anticipated to be published between December 2027 and February 2028, which will cover the monitoring period 2024/25 to 2026/27. Based on published and forecast data it is anticipated that the 2027 Housing Delivery Test Measurement will show that for Greater Cambridge a 5% buffer will be required at the point of plan adoption. This will need to be kept under review.

Table 1: Existing supply (from adopted allocations, sites with planning permission or a resolution to grant planning permission, and windfall allowance) plus updates from a review of adopted allocations

Site/Source	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Plan period (2024-2045)	Post 2045
Existing supply, excluding specific sites listed below	593	797	933	498	651	614	555	532	562	525	425	425	425	425	425	425	425	425	425	425	425	10,935	0
North East Cambridge	0	0	0	0	78	347	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	425	0
North West Cambridge (Eddington)	50	521	78	55	305	376	350	283	100	100	100	100	100	98	0	0	0	0	0	0	0	2,616	0
Darwin Green	112	211	211	197	262	270	230	169	120	120	120	120	100	0	0	0	0	0	0	0	0	2,242	0
Cambridge East – Marleigh and North of Cherry Hinton	111	336	320	323	375	285	186	135	98	0	0	0	0	0	0	0	0	0	0	0	0	2,169	0
Land north and south of Worts' Causeway	0	90	140	125	75	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	430	0
Bell School	0	0	0	0	0	0	42	0	0	0	0	0	0	0	0	0	0	0	0	0	0	42	0
Northstowe	147	80	160	402	473	467	300	300	300	300	300	300	300	300	300	300	300	300	300	300	300	6,229	2,477
Waterbeach New Town	93	82	68	240	376	368	300	300	300	300	300	300	300	300	300	300	300	300	300	300	300	5,727	5,248
Bourn Airfield New Village	0	0	0	50	150	200	150	150	150	200	230	252	250	250	250	250	250	250	250	118	100	3,500	0
Cambourne West	107	159	246	302	308	260	150	150	150	100	70	48	0	0	0	0	0	0	0	0	0	2,050	0
Wellcome Genome Campus	0	0	83	100	150	200	200	200	200	200	167	0	0	0	0	0	0	0	0	0	0	1,500	0
Total	**1,213**	**2,276**	**2,239**	**2,292**	**3,203**	**3,387**	**2,463**	**2,219**	**1,980**	**1,845**	**1,712**	**1,545**	**1,475**	**1,373**	**1,275**	**1,275**	**1,275**	**1,275**	**1,275**	**1,143**	**1,125**	**37,865**	**7,725**

Table 2: Anticipated delivery from new allocations

Year	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Plan period (2024-2045)	Post 2045
North East Cambridge	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950	3,975
Garages between 20 St. Matthews Street and Blue Moon Public House, Cambridge	0	0	0	0	0	0	0	0	12	0	0	0	0	0	0	0	0	0	0	0	0	12	0
North Cambridge Academy, 108 Arbury Road, Cambridge	0	0	0	0	0	0	0	0	75	75	0	0	0	0	0	0	0	0	0	0	0	150	0
1-99 Ekin Road and 1-8 Ekin Walk, Cambridge	0	0	0	-108	75	59	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26	0
2-28 Davy Road and garage blocks, Cambridge	0	0	0	-42	75	15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	48	0
1-78 Hanover Court, 1-49 Princess Court and garage at Newtown garages, Cambridge	0	0	0	-127	164	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	37	0
Former Garage Block, East Road, Cambridge	0	0	0	0	0	40	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	40	0
1-33 Stanton House, Christchurch Street, Cambridge	0	0	0	0	-34	29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	-5	0
Cambridge Junction and Cambridge Leisure, Hills Road, Cambridge	0	0	0	0	0	0	0	0	75	25	0	0	0	0	0	0	0	0	0	0	0	100	0
Cambridge East (airport)	0	0	0	0	0	0	0	0	50	150	250	350	350	350	350	350	350	350	350	350	350	3,950	4,050
North West Cambridge (Eddington densification)	0	0	0	0	0	0	0	0	350	350	350	350	350	300	250	150	50	0	0	0	0	2,500	0
Cambridge Biomedical Campus	0	0	0	0	0	0	0	0	0	0	50	100	150	150	150	150	150	100	0	0	0	1,000	0
Cambourne North	0	0	0	0	0	0	0	0	0	0	50	100	150	200	250	300	300	300	300	300	300	2,550	10,450
Cambourne (Town Centre)	0	0	0	0	0	0	0	0	50	50	20	0	0	0	0	0	0	0	0	0	0	120	0
Grange Farm New Settlement	0	0	0	0	0	0	0	0	0	0	50	100	150	200	250	300	300	300	300	300	300	2,550	3,450
Babraham Research Campus	0	0	0	0	0	0	0	-40	40	40	40	40	0	0	0	0	0	0	0	0	0	120	0
Land at Maarnford Farm, Hunts Road, Duxford	0	0	0	0	0	0	0	0	40	20	0	0	0	0	0	0	0	0	0	0	0	60	0
The Moor, Moor Lane, Melbourn	0	0	0	0	0	0	0	0	20	0	0	0	0	0	0	0	0	0	0	0	0	20	0
Land at Highfields (phase 2), Caldecote	0	0	0	0	0	0	0	0	40	25	0	0	0	0	0	0	0	0	0	0	0	65	0
Land to the west of Cambridge Road, Melbourn	0	0	0	0	0	0	0	0	40	40	40	0	0	0	0	0	0	0	0	0	0	120	0
Total (including North East Cambridge)	**0**	**0**	**0**	**-277**	**280**	**143**	**0**	**-40**	**842**	**925**	**1,100**	**1,390**	**1,500**	**1,550**	**1,600**	**1,600**	**1,500**	**1,400**	**1,300**	**1,300**	**1,300**	**17,413**	**21,925**
Total (excluding North East Cambridge)	**0**	**0**	**0**	**-277**	**280**	**143**	**0**	**-40**	**792**	**775**	**850**	**1,040**	**1,150**	**1,200**	**1,250**	**1,250**	**1,150**	**1,050**	**950**	**950**	**950**	**13,463**	**17,950**

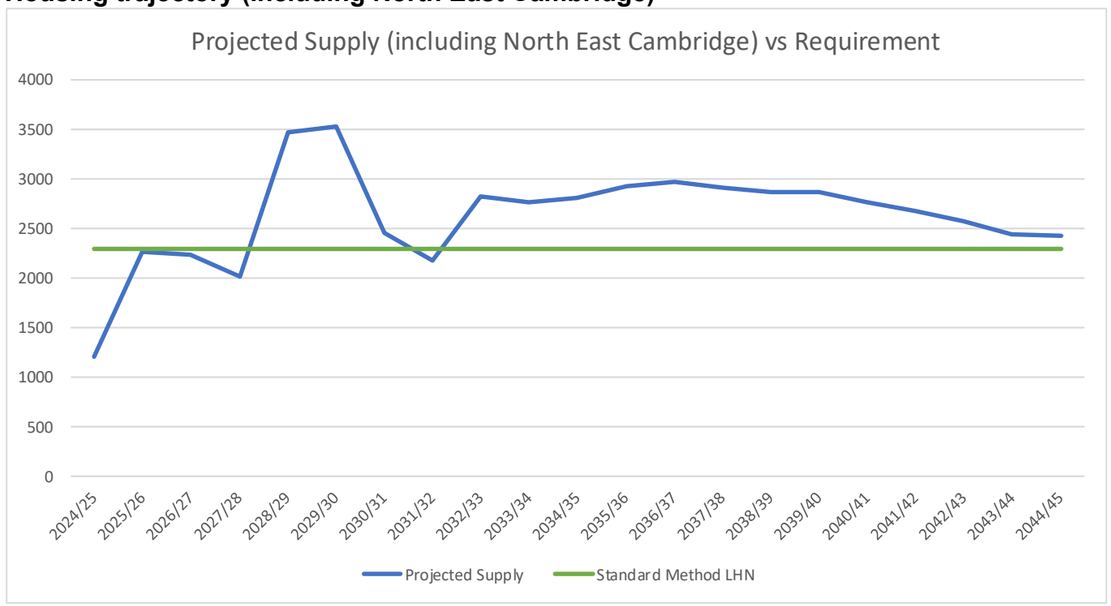
Table 3a: Summary (including North East Cambridge)

Year	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Plan period (2024-2045)	Post 2045
Existing supply, with updates	1,213	2,276	2,239	2,292	3,203	3,387	2,463	2,219	1,980	1,845	1,712	1,545	1,475	1,373	1,275	1,275	1,275	1,275	1,275	1,143	1,125	37,865	7,725
New allocations	0	0	0	-277	280	143	0	-40	842	925	1,100	1,390	1,500	1,550	1,600	1,600	1,500	1,400	1,300	1,300	1,300	17,413	21,925
Total	**1,213**	**2,276**	**2,239**	**2,015**	**3,483**	**3,530**	**2,463**	**2,179**	**2,822**	**2,770**	**2,812**	**2,935**	**2,975**	**2,923**	**2,875**	**2,875**	**2,775**	**2,675**	**2,575**	**2,443**	**2,425**	**55,278**	**29,650**

Table 3b: Summary (excluding North East Cambridge)

Year	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2036/37	2037/38	2038/39	2039/40	2040/41	2041/42	2042/43	2043/44	2044/45	Plan period (2024-2045)	Post 2045
Existing supply, with updates	1,213	2,276	2,239	2,292	3,203	3,387	2,463	2,219	1,980	1,845	1,712	1,545	1,475	1,373	1,275	1,275	1,275	1,275	1,275	1,143	1,125	37,865	7,725
New allocations	0	0	0	-277	280	143	0	-40	792	775	850	1,040	1,150	1,200	1,250	1,250	1,150	1,050	950	950	950	13,463	17,950
Total	**1,213**	**2,276**	**2,239**	**2,015**	**3,483**	**3,530**	**2,463**	**2,179**	**2,772**	**2,620**	**2,562**	**2,585**	**2,625**	**2,573**	**2,525**	**2,525**	**2,425**	**2,325**	**2,225**	**2,093**	**2,075**	**51,328**	**25,675**

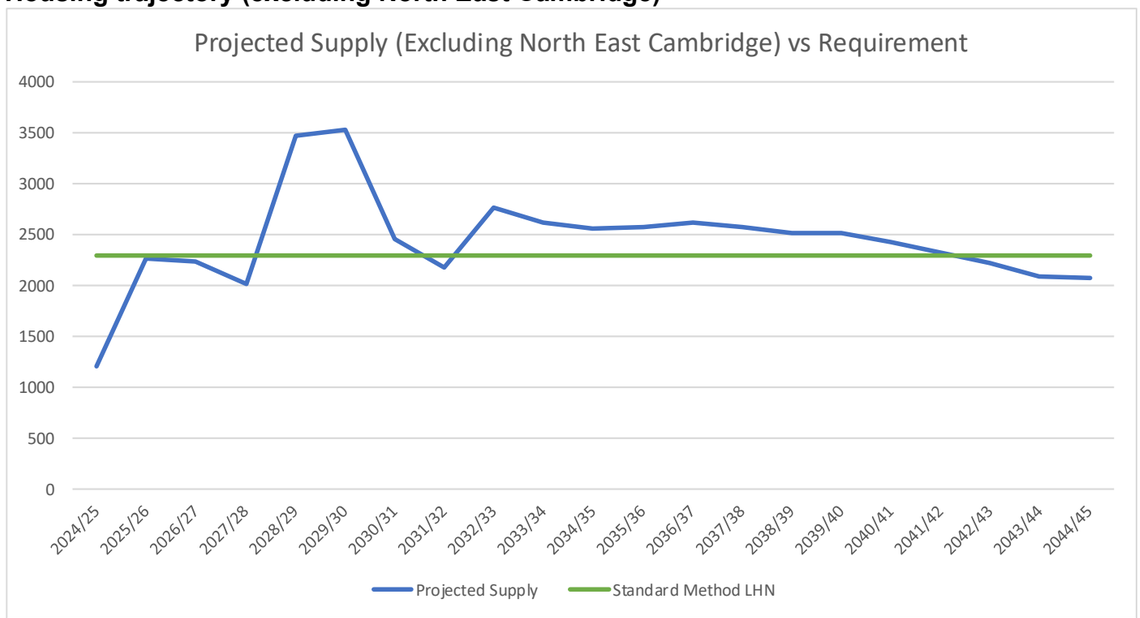
Housing trajectory (including North East Cambridge)



Five-year housing land supply calculation for 2028/29 - 2032/33 using Sedgefield method and with 5% buffer

Component	Step	Calculation	Number
(a)	Requirement from start of plan period (1st April 2024) up to 31st March 2028	2295 dpa x 4	9180.0
(b)	Forecast completions from start of plan period (1st April 2024) up to 31st March 2028		7743.0
(c)	Shortfall/Surplus*	(a) - (b)	1437.0
(d)	5 year requirement + Shortfall/Surplus	(2295 x 5) + (c)	12912.0
(e)	Add 5% buffer	(d) x 1.05	13557.6
(f)	Annual target	(e) / 5 years	2711.5
(g)	Supply within 5 year period		14477.0
(h)	**Land supply**	**(g) / (f)**	**5.34**
(i)	Deficit / surplus	(g) - (e)	919

Housing trajectory (excluding North East Cambridge)



Five-year housing land supply calculation for 2028/29 - 2032/33 using Sedgefield method and with 5% buffer

Component	Step	Calculation	Number
(a)	Requirement from start of plan period (1st April 2024) up to 31st March 2028	2295 dpa x 4	9180.0
(b)	Forecast completions from start of plan period (1st April 2024) up tot 31st March 2028		7743.0
(c)	Shortfall/Surplus*	(a) - (b)	1437.0
(d)	5 year requirement + Shortfall/Surplus	(2295 x 5) + (c)	12912.0
(e)	Add 5% buffer	(d) x 1.05	13557.6
(f)	Annual target	(e) / 5 years	2711.5
(g)	Supply within 5 year period		**14427.0**
(h)	**Land supply**	**(g) / (f)**	5.32
(i)	Deficit / surplus	(g) - (e)	869

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