



BRIEFING

An update on our work for the City Region

CHAIRMAN'S FOREWORD

The last six months have seen some remarkable events – Brexit, currency devaluation, stock market recovery, a new PM, and a new US President-elect. Locally we have seen Devolution plans for the region focus, eventually, on Cambridgeshire with a deal that surpasses the previous three counties one.

Our mission

To represent the city's business community and our partners who share our vision, by offering soundly-based opinion and be an advocate for Cambridge to local and national governments about the opportunities and needs of the region.

As a result, you may have missed three reports on key issues affecting this region. The first was the report from the LSCC Growth Commission, the second was from the West Anglia Taskforce and the third report came from the National Infrastructure Commission on the question of developing links with Oxford. Cambridge Ahead contributed to all three. Of the West Anglia report, the Transport Minister said in Westminster on 8 November: "...the report is one of the most helpful and constructive of the many I am sent... (it) is a constant companion in my red folder." This is the power of evidence-based advocacy and is the approach we have taken from day one of our existence. It is why we are listened to in government, both locally and nationally.

We are now about to embark on the very important task of using the growth data we have collected to model a Cambridge of the future. This is complex work and I am grateful to the Project leaders and Members who give so generously of their time. When it is completed I have no doubt that it will have the attention of those in power who, increasingly, see the need for substantial investment in infrastructure. They are also increasingly aware of the contribution Cambridge makes to the UK economy.

We have a great opportunity to influence the future of the city that means so much to all of our members. It is what we were aiming for when we were founded.

Ian Mather
Chairman





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CEO STATEMENT

Cambridge Ahead is now entering its fourth year, with 40 of some of the largest organisations in the region signed up as Members. Our time horizon is 2050 and the important work of researching and analysing a sustainable growth trajectory for this city is about to begin. More of which is covered in the Growth section later in this report.

We can be proud of what we've achieved in the first three years.

We now have an impressive membership and created a reputation that has made Cambridge Ahead the 'go to' place for authoritative opinion on issues relating to growth, infrastructure development, education and skills. The last year brought a period of

unforeseen change, Devolution bounced between a single deal for Cambridgeshire and a Tri-county deal with neighbouring counties before finally settling on a well-deserved deal for Cambridgeshire. Seismic shocks over Brexit and the underlining uncertainties that still cloud the political and business landscape, have been difficult to weather. Whilst remaining politically neutral we were keen advisers over Devolution for Cambridgeshire and continue to support the Case for Cambridge over Brexit alongside other partners.

Fundamentally in this time of change, we need to continue to work with partners through the local networks, business groups, the three councils, our MPs and

the GCCP LEP to draw together a single vision for Cambridge and its region that we all subscribe to. Cambridge Ahead will continually drive forward an agenda offering impartial evidence-based material to help create this vision and steer Cambridge to a more sustainable City that competes globally as an attractive business destination, offers an enjoyable quality of life, and remains a special place for all communities.

I would like to thank all our team leaders, Members and project participants for their time, dedication and expertise, driving forward the agenda and making Cambridge Ahead the success it has become.



Jane Paterson-Todd
CEO



OUR AGENDA

1. EDUCATION AND SKILLS

The future of a successful and vibrant Cambridge is reliant on access to a suitably skilled workforce based on an integrated regional education and skills ecosystem. Whilst there are a great many areas where the education and skills system is delivering for Cambridge, there are significant aspects where change is needed. At Cambridge Ahead we have elected to focus on three areas where we can make the most relevant and timely impact:

- To articulate and propose solutions for teacher shortages in the Cambridgeshire region
- To secure a fairer funding policy across all Cambridgeshire schools
- To drive the skills agenda through advocacy and support for relevant and focused apprenticeship initiatives

Teacher shortages are a growing problem – the lack of regional pay weighting, high inflationary costs particularly in the housing market, and schools outside our region being able to poach teachers with salary incentives – which all combined has created an even

bigger shortfall in recruiting and retaining talented teachers. We are working with RAND Europe to develop an evidence-based position on where we can effectively influence change. This will identify the specific local drivers of teacher shortages, particularly in STEM subjects and inform potential solutions.

Cambridgeshire remains one of the poorest educationally-funded regions in the country (137 out of 151 boroughs in 2016-17). The current funding formula disadvantages Cambridge due to our population but more critically our growth which is more than double the national average. We are seeking from Government both an interim payment and a longer-term solution that works for the region.

Business from across Cambridge repeat the same message – the absolute need for a skilled workforce across the spectrum of qualifications. Cambridge Ahead is developing a focus on supporting the provision of apprenticeships in the region. We seek to facilitate and support the creation of an integrated skills pathway programme and to understand the policy and framework around Apprenticeships and determine where Cambridge Ahead can add value or lobby for improvement.

Education & Skills Team Members:

Iain Martin

Education Project Leader
Vice-Chancellor, Anglia Ruskin University*

Anne Bailey

Director, Form the Future CIC

Julie Belanger

Research Leader, RAND Europe

Lynne Birch

Schools Advisor, Cambridge County Council
(Curriculum, Teach and Learning Team)

Stella Cockerill

Skills Careers and Enterprise Manager
Greater Cambridge Greater Peterborough LEP

Andrew Daly

Principal, Swavesey Village College

Jill Duffy

Curriculum Development, Pearson

Hans Hagen

Chief Operating Officer & Research Lead
Cambridge University Health Partners (CUHP)

Faye Holland

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Simon Humphrey

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Shirley Jamieson

Head of Marketing, Cambridge Enterprise

Anna McDonald

Director, Barclays*

Heidi Mulvey

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Tim Oates

Group Director Assessment, Research & Development
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Catrin Oliver

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Jane Paterson-Todd

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Hilary Wright

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* Denotes CA Member.

Image: goodluz / 123RF Stock Photo



2. GROWTH PROJECT

The Cambridge Cluster Map

In 2015 we began the process of updating the Cambridge Cluster Map using a new methodology that specifically monitors the growth, in terms of their global turnover and employment, of Cambridge-registered companies, and which tracks the number of Cambridge-active companies, and public and charitable sector research organisations. We officially launched the new map in June this year using data from the Centre for Business Research of the University of Cambridge, and in partnership with our sponsor, Barclays Bank. To access the map, visit www.camclustermap.com



The map represents over 20,000 companies operating within a twenty-mile radius of the centre of Cambridge. The statistics on employment and turnover growth for these organisations are very unusual: in the last four years between 2011 and 2015 the



Cambridge CLUSTER MAP

In partnership with
 **BARCLAYS**

companies grew on average by a staggering 7% per annum, with turnover increasing by £7.9bn to £33bn and employment by over 40,000 to 196,000 people. These figures demonstrate the importance of Cambridge, not only to the region, but also the value it offers on a national scale as a net contributor to the UK. As cited by the *Centre for Cities*, Cambridge is the 3rd fastest-growing city for jobs in the country between 2004 and 2013.

This economic growth has led to an understandable increase in demand for housing, with Cambridge now ranking one of the most expensive places to live in the country, only second to London. During the same period between 2004 and 2013, average house prices were 9.2% of average 'earnings'^[1], this has now increased to 14.5% of average earnings. Where people live, how they move around and the infrastructure that is required to ensure Cambridge continues to be an attractive place to live and work is why we are now gearing up for our main piece of research on growth.

First, the repeating annual measurement of growth in Cambridge-based companies and research laboratories is under way, and the results will be available in January 2017. It will cover the year up to April 2016, and will show turnover and employment growth for each company and sector. It is likely that a similar data draw will be undertaken for the Peterborough area, which will mean that we will have 6 years of data for the combined, devolved economy for when the new mayor is elected next Spring.

Secondly, a survey of the Top 100

[1] Cities Outlook 2015 – Centre for Cities

“Our partnership with Cambridge Ahead on the Cambridge Cluster Map ensures that Barclays is positioned to support high growth businesses in Cambridge. We opened our first Barclays Eagle Lab Incubator in the city earlier this year which will give entrepreneurs the space and opportunities to become part of the Cambridge Phenomenon.”

Jane Galvin, Managing Director, East and South East, Corporate Banking at Barclays

companies in the Cambridge area was planned for July, but was held back, due to the uncertainties caused by the Brexit decision. This survey is now being undertaken, and will focus on three aspects: the connections between the Cambridge companies and the rest of the UK economy; local constraints on their growth; and their estimates of their sector's growth over the next 5 years. We will also ask 2 short questions on the impacts of Brexit on their growth. The results will also be available in January 2017.

A further supplementary technical task of comparing the actual and forecasts growth rates of the Councils' East of England Forecasting Model with the Cambridge Ahead data will also be undertaken in the next 3 months.

Lastly, preparation is in hand for the spatial modelling of the forecast growth of the Cambridge sub-region, in an exercise which will be shared with the Councils' planning officers. This will take as its horizon the year 2050 and will result in a series of scenarios of development. We are also planning an exercise of progressive public engagement with these scenarios, so that a consensus about a Vision for 2050 can be created. This work will begin

in February 2017 and will take 18 months to complete. We are also considering whether Peterborough should be included in this exercise, to produce a complete picture for the future devolved economy.

Because of the scale of this work and its strategic sensitivity, we have proposed changes in the governance of the Growth, Transport, Housing and Commercial Property Projects to ensure close alignment and a common research budget.

Our Commercial Space Group is realigning itself to now explore a broader remit around the supply and demand of commercial space and will report further in our next briefing in Spring of 2017. We are delighted that Chris Bartram has agreed to take this group forward. Chris is a non-executive Director of Land Securities Group Plc, and was until recently Chairman of Orchard Street Investment Management LLP, a firm which he founded in 2004. He also served as a Crown Estate Commissioner for 9 years until 2015 and is Wilkins Fellow of Downing College. We would like to thank Tony Raven, CEO of Cambridge Enterprise, for chairing the group and his work relating to Incubation space.

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Growth & Commercial Space Team Members:

Matthew Bullock*

*Growth Project Leader
Master, St Edmund's College, Cambridge*

Wendy Arntsen

Wellcome Trust Sanger Institute
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Chris Bartram*

*Commercial Space Project leader
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Mark Cotterell

*Property Director, ARM**

Christine Doel

Director, SQW

Mike Derbyshire

*Head of Planning, Bidwells**

David Gill

*MD, St. John's Innovation Centre**

Graham Hughes

Executive Director Economy, Transport and Environment, Cambridgeshire County Council

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Robert Marshall

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Ian Mather

*Chairman, Cambridge Ahead and
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Jane Paterson-Todd

*CEO, Cambridge Ahead**

Tony Raven

Chief Executive, Cambridge Enterprise

Dr Robin Pellew OBE

Chairman, Cambridge Past Present & Future

Christopher Pratt

*Senior Bursar, Jesus College, Cambridge**

Rob Sadler

*Head of Cambridge Office, Savills**

Johnny Vincent

*MD, Pace Investments**

Jeanette Walker

Project Director, Cambridge Biomedical Campus

Bill Wicksteed

Founder & Senior Advisor, SQW Ltd

Dick Wise

*Partner, Bidwells**



3. TRANSPORT

The main aim of the transport group activity is to influence the strategic vision for future transport in Greater Cambridge so that this addresses congestion, supports sustainable economic growth, improves labour market flexibility, reduces environmental impact and maintains the area's reputation as a great place to live and work. To date our activities have sought to contribute to this broad aim.

On short-term issues, we have supported the new shuttle bus *Route R* linking Trumpington Park & Ride to Cambridge railway station to ease congestion at the station. From a standing start, the service has been a huge success, carrying up to 1600 passengers per week and at morning peak-time is only a 5-minute journey when running normally (there are some temporary constraints linked to the station development which we are working with all partners to seek to unblock).

On medium-term projects, we have worked to promote the idea of a new railway station for Addenbrooke's, and remain in discussions with AstraZeneca, the Local Authorities, and John Laing on this.

We have worked closely with the City Deal Board on their proposals for addressing congestion. In our response to the City Deal 'Call for Evidence' and subsequent follow-up to the consultation held in September, we set out compelling arguments as to why the City Deal Board should consider all possible solutions, including congestion charging, to develop a reliable and attractive public transport system that would meet the needs of a rapidly growing city. We remain clear that what is needed is a credible long term plan, with a mixture of incentives and deterrents, that enables a shift away from reliance on the private car and provides attractive alternatives for public transport and cycling.

Looking more widely, our work has encompassed assessing how transport



interventions can be part of the solution to current labour market constraints. For example, we met all the franchise bidders for the Anglian rail route before the award was made to Abellio, set out support for improved links to the east on the line to Ipswich, and for the proposed March-Wisbech rail link, which would bring thousands of homes in Fenland within commuting distance of Cambridge. We have also played a leading role in supporting the West Anglia Task Force, looking at strengthening the links along the corridors between Cambridge and London. The Task Force Report was recently presented to the Rail Minister Paul Maynard MP who was very complimentary about the quality of the evidence and arguments presented.

Most recently we put forward our case and evidence to the National Infrastructure Commission (NIC) for sustainable, fast connections between Cambridge, Milton Keynes and Oxford which also offer important linkages between the various towns and villages along the route, and could support high quality growth in the future. When we met with a contingent from the NIC the response from their lead adviser was, "I have been to countless meetings of 'local business groups' through my time in local government and the civil service, but I have never come across such an engaged, well informed and pro-active group as Cambridge Ahead. The group is clearly a huge asset to the city."

We have also conducted research into the likely future economic functions within Cambridge, how the eastern side of the city can grow in the most sustainable way. Building on this, we have now partnered with the University of Cambridge to carry out detailed transport survey work, and assessment of possible rapid transit solutions to complement existing public transport systems. This major piece of work will report during 2017 and we will work closely with our Growth Project team on the longer-term research and modelling options for Cambridge to ensure activities are properly co-ordinated and aligned.

Transport Team Members:

Alex Plant

*Project Leader
Programme Director Market Reform
and Head of Policy & Regulatory Strategy
Anglian Water*

David Ball

Chairman, David Ball Group

Andy Campbell

MD, Stagecoach East

Emma Fletcher

Managing Director, Smithson Hill

Geoff Gardner

*Head of Mobility, AstraZeneca**

Simon King

*Project Manager, Addenbrookes Hospital**

Professor Peter Landshoff*

*Fellow of Christ's College and
Professor Emeritus University of Cambridge*

Ian Mather

*Chairman, Cambridge Ahead and
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Duncan McCunn

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Will Nicholls

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Jane Paterson-Todd

*CEO, Cambridge Ahead**

Andrew Rawlings

*Technical Director, Mott MacDonald**

Nigel Bringham

*Sustainability Manager, Addenbrookes Hospital**

Sven Topel

*Chairman, Brookgate**

Christopher Walkinshaw

*Group Corporate Communications Director
Marshall of Cambridge**

A14 Cambridge-Peterborough

Image: Highways Agency



4. CONNECTIVITY

As Cambridge Ahead continues to tackle other challenges across the region, connectivity will need to play an integrated part in its solutions – better connectivity at home can result in time-shift for employees both to facilitate work-life-mix, but also reducing pressure at rush hour on traffic; availability of decent connectivity will become a factor of where people choose to live; and our future generations in our education system will expect (even demand) better connectivity to remain in the region.

The Connecting Cambridge project group's remit is to provide a compelling, long-term vision for Cambridge focusing on the mobile, Wi-Fi, broadband, and other networks available, and to recommend and influence future connectivity infrastructure deployment. The goal is to enable businesses and their employees the seamless opportunity to work, and to encourage residents to become more active and participative members of the community. Our achievements to date are two-fold. Firstly, we created a crowdsourcing initiative, called #CambsNotspotter, to

gather vital data to help plug gaps in fixed and mobile coverage across Cambridgeshire. The campaign calls on all residents, employees, students and businesses to help identify 'notspots' – areas of no or low connectivity – by becoming a **#CambsNotspotter**.

The second of our initiatives was to develop a Broadband Connectivity Matrix to help businesses make the right capital decision on their network infrastructure capacity based on their likely usage and number of employees.

The requirements and options for business-level internet connectivity have changed immensely over recent years and there is often a lack of understanding as to what level of capacity a company should be implementing to meet their needs. The connectivity usage of Business users is usually quite different from Home users, who tend to require higher download speeds for data-intensive uses such as watching video. The matrix is at www.cambridgeahead.co.uk/connectivity-matrix

Business Broadband Capacity Matrix

TYPES OF USERS	NUMBER OF USERS				
 Local Office (Light usage)	1 	< 5 	< 25 	< 50 	< 250 
	2-10 Mbps	2-10 Mbps	5-10 Mbps	10 Mbps	50 Mbps
 Multimedia Office (Medium usage)	1 	< 5 	< 25 	< 50 	< 250 
	2-10 Mbps	3.5-10 Mbps	17.5 Mbps	35 Mbps	175 Mbps
 Technical Users (Heavy usage)	1 	< 5 	< 25 	< 50 	< 250 
	Up to 10 Mbps	7.5-10 Mbps	37.5 Mbps	75 Mbps	375 Mbps
Domestic/SME			Corporate Class		

© Cambridge Ahead 2015

Visit www.cambridgeahead.co.uk/connectivity-matrix



In the 6 months since launching #CambsNotspotter we have received 8.77 million data points on actual connectivity across the region. What this has shown is that the level of connectivity across the region is unsatisfactory – the map below shows where there is good, moderate and poor quality. We can also now start to demonstrate where there are actual notspots and can therefore propose ways of how to improve this and will report on proposed opportunities in the Spring of 2017.

It is imperative we continue to collect data so we can understand areas of weakness but also measure improvements in areas that we then address. We continue to encourage all businesses to ask their employees to download the OpenSignal app on their phone to track coverage.

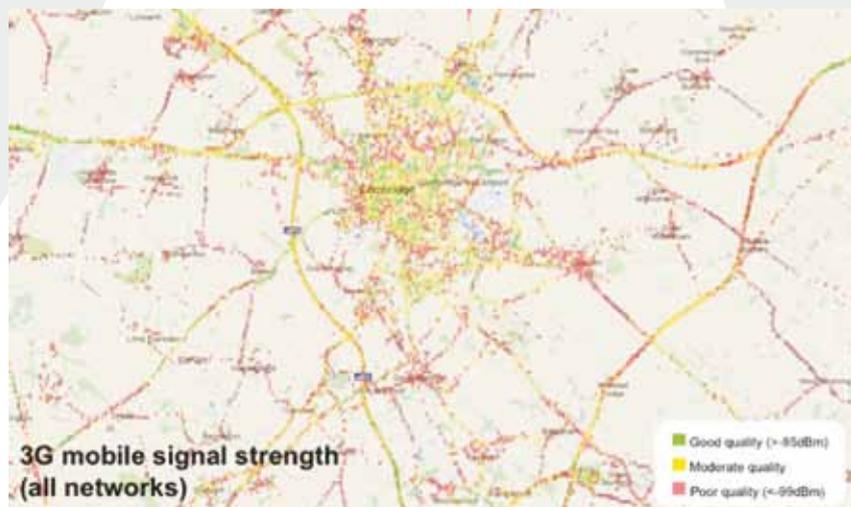


#CambsNotspotter

Going forward we will continue the #CambsNotspotter campaign, determine evidence-lead recommendations for improvements to our network infrastructure, and investigate alternative potential networks to improve our region-wide connectivity. Further to this we will determine how we will support Cambridge being a test bed for new connectivity – through exciting new models and initiatives such as the Internet of Things (IoT), Internet of People, and Smart City in association with businesses, government and academia.

To find out more please visit

www.cambridgeahead.co.uk/our-projects/connecting-cambridge



Connectivity Team Members:

Faye Holland

*Project Leader
Founder and Director, Cofinitive*

Dr David Cleevely CBE*

Cambridge Entrepreneur

Charles Cotton*

Chairman, Cambridge Phenomenon International Ltd

Noelle Godfrey

*Programme Director
Connecting Cambridgeshire &
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John Holgate

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Jane Paterson-Todd

CEO, Cambridge Ahead

Tim Winchcomb

*Consultant, Technology Strategy
Cambridge Consultants**

Richard York

*VP Embedded Marketing, ARM**



New house development in Orchard Park

5. HOUSING

Over the past year the Housing Group has gathered data from market makers and analysts, such as Savills and Bidwells, to fully understand the key drivers that will influence the type, supply and location of housing. Attention has also been given to development densities which can make a major contribution to sustainability but, unless carefully located and designed, can be unacceptable to nearby residents.

Looking forward, our work will dovetail more closely with the research and modelling work that is being led by the Growth Project Group and will also call on inputs from the other project groups. Our contribution will be to bring a 'real world' understanding of supply side factors as a cross check on the

realism of the scenarios generated by the modelling work.

By bringing these strands of expertise together Cambridge Ahead can then make proposals to national, regional and local government which will reduce the difficulties in achieving a spatial distribution of housing that is both sustainable and sympathetic to the needs of all sections of our community.

High house prices are a major issue for the Cambridge area with serious implications for all sections of the community. Key public services have, widely publicised recruitment difficulties and, even with their greater flexibility on levels of pay, firms in the high-tech cluster are worried that housing costs are an obstacle to recruiting the talent they need.

Cambridge Ahead warmly welcomes the initiative from the City Deal authorities to establish a joint housing service through the Housing Development Agency. This comes at a time when, due to the plans for Devolution, new funds for housing are on the table and there will be greater flexibility in deploying them.

We will seek to support the work of the HDA in developing approaches that maximise the impact of any new resources; recognising that the development of affordable housing needs to go hand-in-hand with new market housing.

By bringing together key organisations from the public sector with leading development companies and agencies we can help to shape policies and programmes which take account of the resources and priorities of all who must deliver them. A constructive partnership between public and private sectors is essential in tackling Cambridge's housing challenge.

Bill Wicksteed, an economist who has been involved with studying the implications of growth for the area since contributing to SQW's first Cambridge Phenomenon book in 1984, has agreed to take the helm as Chair of the Housing Group. We would like to thank Richard Powell for chairing this group and delighted he will continue as a member of the group, bringing both his experience of the Cambridge area and perspectives from his active involvements in housing initiatives across the wider South East.

New homes on Barn Road, Great Kneighton



Housing Team Members:

Bill Wicksteed

*Project Leader
Founder & Senior Advisor, SQW*

David Ball

Chairman, David Ball Group

Liz Bissett

*Director of Community Services
Cambridge City Council*

Matthew Bullock*

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James Buxton

*Executive Chairman
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Sue Chadwick

*Senior Associate
Planning & Environment, Birketts**

Terry Fuller

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Richard Howe

*Wing Project Leader
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Andy Hill

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Ian Mather

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Craig McWilliam

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Jane Paterson-Todd

*CEO, Cambridge Ahead**

Richard Powell

Mike Shaw

*Director of Strategic Development, Savills**

Jon Wooles

*Group Finance Director
Brookgate**

Current membership:

Anglia Ruskin University
ARM
AstraZeneca
Barclays Bank
Bidwells
Birketts
Brookgate
Cambridge Consultants
Cambridge University Hospitals
Deloitte
Domino Printing Sciences
Gonville Hotels
Grant Thornton
Grosvenor Britain and Ireland
Hill Partnership
HSBC
Howard Group
Jagex
Jesus College
Marshall of Cambridge
Mills & Reeve LLP
Mott MacDonald
Mundipharma International
Pace Investments
Pigeon Land
PWC
RAND Europe
Red Gate
RG Carter
Ridgeons
Santander
Savills
St John's College
Sepura
Strutt & Parker
TTP Group
The Welding Institute
Trinity College
Wellcome Trust - Sanger Institute
Xaar

Individual Members:

Paul Bailey
Chris Bartram
Harriet Fear MBE

Honorary Vice Chairs:

Lord Alec Broers
Matthew Bullock
Charles Cotton
Dr David Cleevely CBE
Stuart Henderson
Dr Hermann Hauser KBE
Professor Peter Landshoff
Jeremy Newsum



About Cambridge Ahead

Cambridge Ahead is a business and academic member group dedicated to the successful growth of Cambridge and its region in the long term. Our 40 member organisations represent a current working population of over 36,000 people in the city and a turnover of over £5billion.

The group aims to represent the city's business community and our partners who share our vision, by offering soundly-based opinion and be an advocate for Cambridge to local and national governments about the opportunities and needs of the region. At any one time we will have no more than 6 specific initiatives with defined objectives and measurable outcomes. We are politically non-aligned.

Our Purpose

We exist to make Cambridge a place where business can thrive, to help ensure a superior quality of life to the city's inhabitants and workers, whilst preserving the unique nature of our city.

Our Vision

For Cambridge to be the pre-eminent, small city in the world, defined by achieving long-term economic growth and a compelling quality of life. It will be a city where business, discovery, creativity, community and culture flourish together.

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