

Max Bryan 23.06.23

I enclose two documents. The first contains my position on supply as set out in my evidence (Document 1). Rather than incorporate his comments on my schedule, Mr Kinghan has produced a further document containing his position (Document 2). I respond to Mr Kinghan’s position in this note. In doing so, I refer to the tables numbered in Document 2.

Comments on Document 2 - the Supply Summary (LPA)

1. Mr Kinghan’s version of Table 1: NEW SUPPLY CAMBRIDGE OFFICES & LABS, replicates my position on Offices, but includes three additional properties within the Lab supply table. I set these out below, along with my comments:

Delivery year	Scheme	Scheme NIA 000 sq ft	Comment on LPA mark up of table
2023	Wellcome - One commercial building	44	This space is being delivered as institute space for the Campus and is not being made available to the commercial office / lab market. Similarly, neither party has included University research space (e.g. Dolby centre) in take up that the University delivers for their own use and which will never be available for the commercial market. The proposed 2023 delivery also seems ambitious on timings.
	Astrazeneca at CBC	131	This space is being delivered by AZ as an owner occupier and will not therefore be available to the commercial market, so had been excluded from my table.
2025	ARM at PTP	95.4	This property is not pre-let to Arm and has already been reported in my office table at Table 1 – see 100k NIA in 2025 as Peterhouse Technology Park. To include this in the lab table is double counting as it is already recorded in the office table.

By including the floorspace above, Mr Kinghan has incorrectly updated Table 2: SUPPLY SUMMARY 2022-2024 (NEAR) AND 2025-2028 (MEDIUM) FOR OFFICE & LABS SPLIT OUT SEPERATELY, in relation to Lab delivery. To summarise:

Appellant supply table summary:

LABS	Total NIA	NIA (less C.North)	NIA (less all waiting for detailed consent)
2022-2024	342	342	342
Annual	114	114	114
2025-2028	1,194	855	536
Annual	299	214	134

LPA supply table summary:

LABS	Total NIA	NIA (less C.North)	NIA (less all waiting for detailed consent)
2022-2024	517	517	517
Annual	172	172	172
2025-2028	1,289	950	631
Annual	322	238	158

This then follows though to Mr Kinghan’s Supply summary 2022- 2024 (Table 3: SUPPLY SUMMARY 2022-2024 (NEAR) AND 2025-2028 (MEDIUM) FOR OFFICES & LABS COMBINED).

Appellant supply table summary:

COMBINED OFFICE & LAB NEW SUPPLY	Total NIA	NIA (less C.North)	NIA (less all waiting for detailed consent)
2022-2024	735	735	735
Annual	245	245	245
2025-2028	2,044	1,495	1,176
Annual	511	374	294

LPA supply table summary:

COMBINED OFFICE & LAB NEW SUPPLY	Total NIA	NIA (less C.North)	NIA (less all waiting for detailed consent)
2022-2024	910	910	910
Annual	303	303	303
2025-2028	2,139	1,590	1,271
Annual	535	398	318

2. Table 4: UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON MR KINGHAN’S FIGURE

Mr Kinghan states there is need for 461k sq ft pa of new supply for the period 2020-2041. He bases this on the need position as set out in CD5.10. In the near term, even using his inflated figures with

the inclusion of the 3 properties listed above (in orange box), this supply does not meet near term new supply requirements.

In the medium term, even using Mr Kinghan's inflated figures with the inclusion of the 3 properties listed above (in orange box), this supply could only meet medium term demand with the inclusion of the delivery of the appeal site at Cambridge North plus there would still be the need for further schemes to secure detailed consents.

3. Table 5: UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON PROJECTED ANNUAL AVERAGE TAKE UP OF 850K.

For Mr Kinghan's response, when utilising the forecast for take up at 850k sq ft but with a 63% ratio of new space (so 536k sq ft of new space pa), even using his inflated supply figures with the inclusion of the 3 properties listed above (in orange box), such supply could only meet medium term demand with the inclusion of the delivery of the appeal site at Cambridge North plus there would still be the need for further schemes to secure detailed consents.

4. Mr Kinghan then includes further outline schemes he wishes to include in the supply suggesting there is no impediment to their delivery but in doing so fails to consider the need to secure reserved matters approval. In addition, some of his comments on those schemes in the status box of that table are not based on market reality. My comments on these are in green in the table below. Thirdly, Mr Kinghan's references 2030 and then the period 2025-29.

Outline Permissions - no impediment to delivery by 2030					
Lab/Office		Scheme GIA	Scheme NIA	Status	Appellant comments
2025-2029	St Johns Innovation Park B2		85	Reserved matters application permitted	Note: St Johns House which currently has 2 tenants (only 1 is vacating). It is expected to need to be demolished prior to progressing the scheme.
	Wellcome Genome Campus		350	Outline application permitted, potential for part delivery of a total of c1,500,000 sqft total mix of commercial and institutional space. Figures indicative but reflect market and position.	No detailed applications yet. To deliver 350k sq ft on what is a greenfield site by 2030 would be considered very ambitious.
	CITP	480	340	Remainder of the 44,671 sqm permission (total of 480,000 sqft minus 90,000 as per cell M26)	One building has been included by the appellant even though the current owner will be amending the detailed consents they have. To deliver 340k sq ft on what is a greenfield site by 2030 would be considered very ambitious especially as the same owner will be delivering space at Granta Park
	Eddington		200	Permission granted for development including 100,000 sqm B1 of which 40,000 sqm or 450,000 sqft for commercial. Quantum estimated	No detailed consents. The delivery of any commercial space by 2030 is not anticipated by the market.
	West Cambridge		300	Total of 170,000 sqm / 1.8m sqft assume some delivery in period, has resolution to grant and S106 signed. Quantum estimated	No consent – even outline. The University is focussed on delivery of space for its own users and commercial space at this quantum is not expected.
	Cambridge Biomedical Campus, South of Dame Mary			350	Outline application permitted for 75,000 sqm or which 51,000 or 570,000 sqft remaining. Expectation to deliver in next 5 years. Adjusted down for healthcare components

	Archer Way				
	Plot 9 CBC		114	Application Number 16/1078/OUT Site Plot 9 Cambridge Biomedical Campus - 14,193 sqm of biomedical and biotech research and development (Use Class B1(b)). 20% discount applied for medical area.	No detailed consents

5. Although Mr Kinghan's table is not very clear, he can only show over supply in the medium term by including all the schemes above (most of which do not have detailed consents) and by including Cambridge North and other schemes currently seeking detailed consents.

NEW SUPPLY CAMBRIDGE - Looking out to 2028

Office	Scheme NIA	NIA (less C.North)		NIA (less all waiting for detailed consent)	Status	Within 5 mins of train	Council Position
		Total NIA	C.North				
2022 (PC'd)	20 Station Road	65			PC'd & Let	Yes	
	30 Station Road	80			PC'd & Let	Yes	
	3 & 4 Station square	10			PC'd & Let	Yes	
	2022 Total	155	155	155			
	One Cambridge Square	95			Under Construction	Yes	
2023	Old Swiss P2	28			Under Construction	No	
	2023 Total	123	123	123			
	Brooklands	65			Under Construction	Yes	
2024	10 Station Road	50			Under construction	Yes	
	2024 Total	115	115	115			
2025	Peterhouse TP	100			Detailed consent. Start date 2024	No	
	2025 Total	100	100	100			
2026	Dirac	80			Detailed consent. Start date not confirmed and requires a pre let to progress construction.	No	
	Devonshire Gardens	120			Detailed consent. Start date 2024	Yes	
	F2, CB1	40			Detailed consent. Start date TBC.	Yes	
	Cambridge North (s 04)	120			Detailed application as part of the appeal site	Yes	
2026	2026 Total	360	240	240			
	Botanic Place	300			Detailed consent. Start date 2024	Yes	
2027	2027 Total	300	300	300			
	Cambridge North (S 09)	90			Outline application as part of the appeal site	Yes	
2028	2028 Total	90	0	0			

detailed application but meets

all figures 000 sq ft NIA. (if NIA figures not available assumption of 10% reduction to change from GIA to NIA)

Lab	Scheme NIA	NIA (less C.North)		NIA (less all waiting for detailed consent)	Status	Within 5 mins of train	Council Position
		Total NIA	C.North				
2022 (PC'd)	Nil				No new lab space delivered		
2023	1000 Discovery Drive	102			Under construction	No*	
	Unity Campus	80			Under construction	No	
	Wellcome - One commercial building	44			21/05384/REM Total of 4417m2 (GEA) Use Class E, adjusted at 0.9 NIA and	No	
	AstraZeneca at CBC	131			Under construction, 13,502 sqm adjusted to 145,000 sqft and NIA	When new station opens	
	The Press, Foston (Ph 1)	14			Under construction	Yes	
	2023 Total	370.67	370.67	370.67			
2024	Babraham	36			Under Construction	No	
	One Grants	108			Under Construction	No	
2024 Total	144	144	144				
2025	Zone 2 (H), Grants	81			Detailed consent. Start date not confirmed. Assumed 2024	No	
	The Press, Foston (Ph 2)	56			Detailed consent. Start date 2023	Yes	
	ARM at PTF	95.4			Permitted for 10,182 sqm, new B1 building, Reserved Matters	No	
	SCSC, Sawston	117			Detailed consent. Start date not confirmed. Assumed 2024	No	
2025 Total	350.4	350.4	350.4				
2026	Zone 2 (F), Grants	81			Detailed consent. Start date not confirmed. Assumed 2024	No	
	Chesterford RPI**	54			Detailed consent. Start date not confirmed. Assumed 2024	No	
	Cambridge North (S 06)	87			Detailed application as part of the appeal site	Yes	
	2026 Total	222	136	136			
2027	Zone 2 (G), Grants	54			Detailed consent. Start date 2025	No	
	Cambridge North (S 07)	92			Detailed application as part of the appeal site	Yes	
	Block B, Melbourn SP	65			Detailed building application as part of larger outline application	No	
	Vitrum	133			Detailed application submitted	No	
2027	Merlin Place	121			Detailed application submitted	No	
	2027 Total	465	373	344			
2028	CITP	90			Detailed consent to be varied. Expected start date 2028	No	
	Cambridge North (S 09)**	160			Outline application as part of the appeal site	Yes	
	2028 Total	250	90	90			

** Beyond SDCB boundary

Outline Permissions - no impediment to delivery by 2031

Lab/Office	Scheme GIA	Scheme NIA	Status	Within 5 mins of train	Council Position
2025-2029	St Johns Innovation Park B2	85	Reserved matters application permitted		
	Wellcome Genome Campus	350	Outline application permitted, potential for part delivery if a total of c1,500,000 sqft total mix of commercial and institutional space. Figures indicative but reflect market and position.		
	CITP	480	Permitted for the 44,671 sqm permission (total of 180,000 sqft across 50,000 sqm net LPO)		
	Eddington	200	Permission granted for development including 100,000 sqm B1 of which 40,000 sqm of 450,000 sqft for commercial. Quantum estimated		
	West Cambridge	300	Total of 170,000 sqm 1.5m sqft assume some delivery in period, has resolution to grant and S106 signed. Quantum estimated		
	Cambridge Biomedical Campus - South of Dame Mary Acher, West	350	Outline application permitted for 75,000 sqm or which 51,000 or 570,000 sqft remaining. Expectation to deliver in next 6 years. Adjusted down for healthcare components	Yes	when station opened
Plot 9 CBC	114	Application Number 16/1078/001Y Site Plot 9 Cambridge Biomedical Campus - 14,193 sqm of biomedical and biotech research and development (Use Class B1(B)). 20% discount applied for medical area			

Further Permissions (to acknowledge but not include in supply)

Lab/Office	Scheme GIA	Scheme NIA	Status	Within 5 mins of train	Council Position
2022-2029	Huawei	554	409	Former Spicers Site, permission for Huawei R&D facility	
	Cambourne	170	153	Land to the west of Cambourne, outline permission	
	Waterbeach	167	150	Waterbeach New Town	
	Northstowe	161	145		

Office	Scheme NIA	NIA (less C.North)		NIA (less all waiting for detailed consent)
		Total NIA	C.North	
2022-2024		393	393	393
Annual		131	131	131
2025-2028		850	640	640
Annual		213	160	160

LABS	Scheme NIA	NIA (less C.North)		NIA (less all waiting for detailed consent)
		Total NIA	C.North	
2022-2024		517	517	517
Annual		172	172	172
2025-2028		1,289	950	631
Annual		322	238	158

LABS	Scheme NIA	NIA (less C.North)	
		Total NIA	C.North
2025-2030		2,689	
Annual		538	

SUPPLY SUMMARY 2022-2024 (NEAR) AND 2025-2028 (MEDIUM) FOR OFFICES & LABS COMBINED

	NEAR TERM				Comments	Variance to average need pa (as per MK)
	2022	2023	2024	2024		
	Total need for new supply 2020-41 (as per MK report)	9688				
Average need for new supply pa 2020-41 (as per MK repr)	461					
Total (average pa)	303				Significant under supply pa	-158
Less (C North) (average pa)	303				as above	
Less (less all waiting for detailed consent) (average pa)	303				as above	
<th colspan="4">MEDIUM</th> <th rowspan="3">Comments</th> <th rowspan="3">Variance to average need pa (as per MK)</th>	MEDIUM				Comments	Variance to average need pa (as per MK)
	2025	2026	2027	2028		
	Total (average pa)	398				
Less (C North) (average pa)	318				Continuing under supply	-64
Less (less all waiting)	318				Significant under supply	-143

	MEDIUM				Comments	Under supply of new office and lab
	2025	2026	2027	2028		
	Projected annual average take up Medium/Longer term from	850				
Ratio of new spaces required versus churn of existing space	63%					
Need for new space PA Medium/Longer term from 2025 (next)	536					
Total (average pa)	398				Continuing under supply	-138
Less (C North) (average pa)	318				Significant under supply	-218
Less (less all waiting)	318					

UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON MK FIGURE

	NEAR TERM				Comments	Variance to average need pa (as per MK report)
	2022	2023	2024	2024		
	Total need for new supply 2020-41 (as per MK report)	9688				
Average need for new supply pa 2020-41 (as per MK)	461					
Total (average pa)	303				Significant under supply pa	-158
Over 3 years						-474
Total (average pa)	303				Significant under supply pa	-158
Over 5 years						1022

UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON ANNUAL AVERAGE TAKE UP OF 750K

	MEDIUM				Comments	Under supply of new office and lab developments pa
	2025	2026	2027	2028		
	Projected annual average take up Medium/Longer term from	750				
Ratio of new spaces required versus churn of existing	63%					
Need for new space PA Medium/Longer term from 2025	473					
Total (average pa)	666				Supply exceeds need	193

UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON PROJECTED ANNUAL AVERAGE TAKE UP OF 850K

	MEDIUM				Comments	Under supply of new office and lab
	2025	2026	2027	2028		
	Projected annual average take up Medium/Longer	850				
Ratio of new spaces required versus churn of	63%					
Need for new space PA Medium/Longer term from	536					
Total (average pa)	666				Supply exceeds	130

Table 1: NEW SUPPLY CAMBRIDGE OFFICES & LABS - Looking out to 2028

Office	Scheme	Scheme NIA	Total NIA	NIA (less C/North)	NIA (less all waiting for detailed consent)	Status	Within 5 mins of train	Council Position
2022 (PC16)	30 Station Road	66				PC16 & Let	Yes	
	30 Station Road	80				PC16 & Let	Yes	
	3 & 4 Station square	10				PC16 & Let	Yes	
	2022 Total		156	156	156			
2023	One Cambridge Square	96				Under construction	Yes	
	Old Swiss PZ	28				Under construction	No	
	2023 Total		123	123	123			
2024	Brooklands	65				Under construction	Yes	
	10 Station Road	50				Under construction	Yes	
	2024 Total		115	115	115			
2025	Peterhouse TP	100				Detailed consent. Start date 2024	No	
	2025 Total		100	100	100			
2026	Drac	80				Detailed consent. Start date not confirmed and requires a pre let to progress construction.	No	
	Devonshire Gardens	128				Detailed consent. Start date 2024	Yes	
	FC CB1	43				Detailed consent. Start date 1/22	Yes	
	Cambridge North (S 04)	120				Detailed application as part of the appeal site	Yes	
	2026 Total		369	240	240			
2027	Botanic Place	300				Detailed consent. Start date 2024	Yes	
	2027 Total		300	300	300			
2028	Cambridge North (S 08)**	90				Outline application as part of the appeal site	Yes	
	2028 Total		90	0	0			

* 508 has not submitted detailed application but meets other criteria and would be submitted on successful appeal to maintain programme for target delivery in 2028 and complete Cambridge North place making.

all figures 000 sq ft NIA. (if NIA figures not available assumption of 10% reduction to change from GIA to NIA)

Lab	Scheme	Scheme NIA	Total NIA	NIA (less C/North)	NIA (less all waiting for detailed consent)	Status	Within 5 mins of train	Council Position
2022 (PC16)	1000 Discovery Drive	102		0	0	No new lab space delivered		
	Unity Campus	80				Under construction. In outline application	No*	
	The Press, Foxton (Ph 1)	14				Under construction. In outline application	No	
	2022 Total		196	196	196			
2024	Barabram	38				Under construction. In outline application	No	
	2024 Total		108	146	146			
2025	Zone 2 (H), Grants	81				Detailed consent. Start date not confirmed. Assumed 2024	No	
	The Press, Foxton (Ph 2)	98				Detailed consent. Start date 2023	Yes	
	2025 Total		179	257	257			
2026	Zone 2 (F), Grants	81				Detailed consent. Start date not confirmed. Assumed 2024	No	
	Chatterfore sign	54				Detailed consent. Start date not confirmed. Assumed 2024	No	
	Cambridge North (S 06)	87				Detailed application as part of the appeal site	Yes	
	2026 Total		222	130	130			
2027	Zone 2 (G), Grants	54				Detailed consent. Start date 2024	No	
	Cambridge North (S 07)	92				Detailed application as part of the appeal site	Yes	
	Block B, Melbourn SP	60				Detailed building application as part of larger outline application	No	
	Vivum	133				Detailed application submitted	No	
	Merlin Place	121				Detailed application submitted	No	
	2027 Total		460	373	54			
2028	CTP	90				Detailed consent to be varied. Expected start date 2026	No	
	Cambridge North (S 09)***	160				Outline application as part of the appeal site	Yes	
	2028 Total		250	94	94			

* Cambridge South station once open will bring within 5 mins walk of train.

** Beyond SCDC boundary.

*** 508 has not submitted detailed application but meets other criteria and would be submitted on successful appeal to maintain programme for target delivery in 2028 and complete Cambridge North place making.

Table 2: SUPPLY SUMMARY 2022-2024 (NEAR) AND 2025-2028 (MEDIUM) FOR OFFICE & LABS SPLIT OUT SEPERATELY

Office	Total NIA	NIA (less C/North)	NIA (less all waiting for detailed consent)
2022-2024	393	393	393
Annual	131	131	131
2025-2028	850	640	640
Annual	213	160	160

LABS	Total NIA	NIA (less C/North)	NIA (less all waiting for detailed consent)
2022-2024	342	342	342
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Table 3: SUPPLY SUMMARY 2022-2024 (NEAR) AND 2025-2028 (MEDIUM) FOR OFFICES & LABS COMBINED

COMBINED OFFICE & LAB NEW SUPPLY	Total NIA	NIA (less C/North)	NIA (less all waiting for detailed consent)
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Annual	245	245	245
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Annual	511	374	294

Table 4: UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON MK FIGURE

Total need for new supply 2020-41 (as per MK report)		9688		
Average need for new supply pa 2020-41 (as per MK report)		461		
NEAR TERM		Comments		
2022	2023	2024	Variance to average need pa (as per MK report)	
Total (average pa)			245	
Less (C North) (average pa)			245	
Less (less all waiting for detailed consent) (average pa)			245	
MEDIUM			Comments	
2025	2026	2027	2028	Variance to average need pa (as per MK report)
Total (average pa)			511	
Less (C North) (average pa)			374	
Less (less all waiting for detailed consent) (average pa)			294	

Table 5: UNDER SUPPLY OF NEW OFFICE & LAB DEVELOPMENTS BASED ON PROJECTED ANNUAL AVERAGE TAKE UP OF 850K

Projected annual average take up Medium/Longer term from 2025 (next 10 years)	850			
Ratio of new spaces required versus churn of existing space (provided by MK CD9.08 (3.18))	63%			
Need for new space PA Medium/Longer term from 2025 (next 10 years)	536			
MEDIUM		Comments		
2025	2026	2027	2028	Under supply of new office and lab developments pa
Total (average pa)			511	
Less (C North) (average pa)			374	
Less (less all waiting for detailed consent) (average pa)			294	