



**CAMBRIDGESHIRE
& PETERBOROUGH**
COMBINED AUTHORITY

CAMBRIDGESHIRE AND PETERBOROUGH COMBINED AUTHORITY BOARD	AGENDA ITEM No: 2.1
25 OCTOBER 2017	PUBLIC REPORT

MARKET TOWN MASTERPLANS: ST NEOTS

1.0 PURPOSE

- 1.1. The ten market towns of Cambridgeshire and Peterborough, and the city of Ely, represent the places where much of the planned housing growth will occur over the next twenty years. They will be home to approximately a third of the population of the Combined Authority area. It is therefore hugely important that market towns thrive and are successful as prosperous economic centres, and are vibrant, great places to live. Previous economic strategies have not always recognised their role, nor has there been co-ordinated investment plans that enable them to achieve their full potential.
- 1.2. St Neots was chosen by the Combined Authority as the starting point for a renewed focus on market towns, and the 100 Day Plan committed investment to develop a Masterplan. This report brings the first phase of the St Neots Masterplan to the Board. The key conclusion is that St Neots is a place that has great potential as a leading example of a thriving modern day market town, but this needs to be unlocked by creating an investment programme and a new partnership and delivery team.
- 1.3. The Masterplan analysis concludes that from a coordinated programme of investments an additional £185m/annum Gross Value Added (GVA) will be created by the end of the plan period. The first stage of work has identified a package of £5.8m of early stage investments – these would enable future growth as well as make a real difference for the existing residents and visitors of St Neots.
- 1.4. However, the forecast growth of GVA in St Neots of 40% falls well short of the Combined Authority goal to double GVA in all areas of the region. The strategic implication from this analysis is that our target to double Cambridgeshire and Peterborough's GVA can only be met if the ceiling on new homes and new jobs, with related investments, is significantly increased.

- 1.5. It is considered essential to the development of future plans for St Neots that the A428 expressway and the rapid transit (light railway) system connecting St Neots with Cambridge are both commissioned and built by the early 2020s.

<u>DECISION REQUIRED</u>	
Lead Member:	Cllr Robin Howe Portfolio Holder for Economic Strategy
Lead Officer:	Martin Whiteley, Chief Executive
Forward Plan Ref: 2017/018	Key Decision: Non key decisions for these recommendations
<p>The Combined Authority Board is recommended to:</p> <ul style="list-style-type: none"> a) Welcome the analysis and findings of the first phase of the Masterplan for St Neots, b) Endorse the development of the next phase of the Masterplan through the creation of a “St Neots Masterplan Partnership” c) Note that a total investment programme of up to £5.8m is needed to unlock the growth potential of St Neots within existing plans d) Request that officers work with the St Neots Masterplan Partnership to develop a business case for collective investment in the proposed programme, and bring forward investment proposals to this Board as part of that approach e) Establish that any proposals for Combined Authority investment that are brought forward are in line with the Authority’s Investment Strategy as set out in paragraph 3.8 f) Note the intention to promote the development of masterplans for market towns in Cambridgeshire, as part of the Combined Authority’s wider economic strategy 	<p>Voting arrangements</p> <p>Simple majority of all voting members</p>

2.0 CONTEXT

- 2.1 Through the negotiation of the devolution deal with Government the Combined Authority area has committed to double the size of the Cambridgeshire and Peterborough economy over the next 25 years, adding nearly £20bn of Gross Value Added (GVA).

2.2 Cambridgeshire is home to ten market towns (or areas of similar size), and the City of Ely:

- Chatteris
- Ely
- Littleport
- Huntingdon
- March
- Ramsey
- Soham
- St Ives
- St Neots
- Whittlesey
- Wisbech

2.3 These communities currently have a collective population of around 180,000 people; set to rise by 2036 to over 250,000 people. As a collective, this will mean that the population growth in our market towns is on par with our population growth in our two main cities. This growth needs to be met with renewed focus and strategic investment planning.

2.4 The Combined Authority has formed an independent Economic Commission to provide a powerful evidence base that will inform an inaugural local Industrial Strategy for Cambridgeshire and Peterborough. The local industrial strategy will highlight the future economic sectors for the area and the places where these sectors are likely to grow and flourish. Market town masterplans are considered a key means of turning the local industrial strategy into realisable delivery plans. They have the potential to provide a mechanism enabling every market town in our area to realise its potential and be a vibrant and prosperous place in its own right. While market town masterplans will be developed using a generic approach, our market towns are all different. The approach will recognise this, identifying the unique and defining features of each market town.

2.5 St Neots is the largest town in our area. It has a population in excess of 40,000, with feeder communities which rely on St Neots as a hub for services. The catchment of St Neots is in the region of 80,000. St Neots is set to see a further population increase of 2% per year for the next 20 years.

2.6 The analysis undertaken as part of the Masterplan for St Neots has worked with local partners to combine existing evidence and strategies with new research and engagement to assess where the greatest opportunities and potential challenges lay for this community.

3 MASTERPLAN FOR ST NEOTS

Developing a Masterplan

3.1 The Combined Authority engaged experts Inner Circle to work with local partners to develop the first iteration of a Masterplan for St Neots, which would act as a catalyst for change in St Neots itself as well as a prototype for further Masterplans across the county. It has always been intended that this Combined Authority investment will provide local partners with a starting point with which they can jointly own and develop further a Masterplan for the town.

- 3.2 The starting point for this work has naturally been the considerable effort and engagement undertaken by the local community and key stakeholders in planning for the future of the town, namely; the St Neots Neighbourhood Plan, the draft Huntingdonshire Local Plan, and the Market Town Transport Strategy. Inner Circle worked with the local community to understand the value which could be added by a Masterplan, and the opportunity presented by devolution and the extra investment in growth it has brought via the Combined Authority.
- 3.3 This process reached some immediate and fundamental conclusions about the principle of a Market Town Masterplan:
- A Masterplan can add value by summarising the collective ambitions and priorities of partners into a single strategy – it can bring together in a single list the most important actions needed to unlock key opportunities
 - Developing a Masterplan can bring new weight and evidence to existing plans, and it can surface new thinking or fresh opportunities
 - A Masterplan will only be successful if it sets out an exciting vision for the future which the community recognises and which local partners can support and work together to deliver
- 3.4 In St Neots the first phase of Masterplan development has highlighted a market town which has contributed significantly to the county's recent growth and which now sits at a crossroads of opportunity and challenge:
- St Neots is an “engineering and manufacturing dynamo” which contributes around 20% of Huntingdonshire's total GVA, plays a significant role for the county as a whole, but crucially needs support to strengthen and to take on opportunities presented by leaving the EU
 - St Neots Town Centre is in decline despite its wide catchment, and needs a targeted package of support to make better uses of the unique assets and attractions of the town – this will support new growth but will also bring significant added benefit to the existing residents of the town
 - St Neots is strategically positioned within the East / West corridor between Cambridge and Oxford, and the opportunities for greater connectivity and high-value job creation that may be presented by that in the future
 - There is an outward commute of over 8000 people from St Neots each day, including 1000 people that live in St Neots and work outside of Cambridgeshire and Peterborough. When inward commuting is taken into account, St Neots experiences something like a net loss of 25% of GVA to areas outside of Cambridgeshire and Peterborough
- 3.5 The analysis summarises that current planned growth for St Neots will deliver 4000 new homes, 3500 new jobs and will result in an increase in GVA of £185m. It also highlights that this growth is dependent on a number of interventions and investments which local partners must undertake to unlock this growth. The full draft of the Masterplan for St Neots is included as Appendix A.

3.6 Within this, this first iteration of the Masterplan identifies the need for a coordinated set of investments and interventions that are required in the following strategic areas:

- Town Centre Regeneration,
- Transportation,
- Industry, and;
- Housing

The work to date has identified a total potential investment programme of up to £5.8m which is necessary to support the planned growth of St Neots within existing plans. The report notes that further work is needed to develop this in detail and further understand the complete investment package needed for the town. This is attached as Appendix A.

3.7 A programme of investment for St Neots will only be truly successful if it is part of a coordinated effort from all key partners, and if each partner is willing to take significant and bold steps towards redevelopment.

3.8 Furthermore, any Combined Authority investment proposals brought forward as part of the business case should be aligned, as much as possible, to the principles of the Cambridgeshire and Peterborough Investment Strategy, namely:

- Borrowing against capital – The Government has committed to grant Mayoral Combined Authorities the ability to borrow against their capital devolved funds, thereby enabling a more flexible approach to investment and multiplying the total capital available
- Recycling capital – Recycling capital means recovering and reinvesting the benefits into other projects where possible, thereby maximising the ability to leverage private sector inward investment and socio-economic outputs
- Investment by way of debt or equity – The funding approach towards individual projects will draw upon a blend of public and private sources of capital to efficiently bring projects forward. Capital can be supplied in the form of debt (fixed term basis, typically secured against the asset) or equity (recoverable via an agreed coupon and/or profit share should predetermined criteria be met).

3.9 As a result of this work the following conclusions and recommendations are made for the Board:

- a) To welcome the analysis and findings of the first phase of the Masterplan for St Neots,
- b) To endorse the development of the next phase of the Masterplan through the creation of a “St Neots Masterplan Partnership”
- c) To note that a total investment programme of up to £5.8m has been identified so far as needed to unlock the growth potential of St Neots within existing plans

- d) To work through the St Neots Masterplan Partnership to develop a business case for collective investment in the proposed programme, and bring forward investment proposals to this Board as part of that approach

Masterplan for St Neots – Phase 2

- 3.10 In addition to these immediate recommendations for the actions needed to progress the Masterplan for St Neots, the work to date also raises further strategic considerations for the Combined Authority.
- 3.11 The Combined Authority has committed to double the size of the Cambridgeshire and Peterborough economy through generation of nearly £20bn of extra GVA. The current analysis undertaken for the Masterplan for St Neots has concluded that within existing planned growth, the GVA uplift in this market town will only hit 40%, falling 60% or £285m short of doubling.
- 3.12 Ahead of the analysis and economic forecasting which will come forward as part of the independent Economic Commission, the assessment for St Neots (which has been tested with the technical group attached to the Economic Commission) serves as an early indication of the challenge this area will face in achieving our overall ambition for economic growth within current parameters and expectations. Further GVA generation may be possible within St Neots by focussing partnership activity around reducing the amount of net outward commuting from the town (which is a recommendation for the next phase of development of the Masterplan for St Neots), but ultimately the current allocation of new homes and jobs for St Neots within the Local Plan places a cap on the growth potential within the town.
- 3.13 For the St Neots Masterplan the implications of this are that local partners will need to build upon the work presented today, and develop an even bolder second phase Masterplan. This will need to bring fresh thinking and solutions considering, for example:
- The importance of addressing education and skills provisions - how initiatives like apprenticeship academies and technical training colleges could be invested in to provide the skilled technical workforce for the next generation of St Neots industries
 - how the introduction of enterprise zones and tax incentives could attract more businesses to locate to or grow in St Neots, and capture more of the 8000 workers that commute out of the town every day
 - the opportunities presented by the vastly improved connectivity of the East – West corridor could benefit St Neots and its surrounding communities
 - The way in which the public sector estate in St Neots could be better and more efficiently utilised
 - Related to the East – West corridor, the opportunities that would be presented to St Neots by the introduction of a rapid mass transport link between St Neots and Cambridge (where the Combined Authority has already invested in feasibility work to progress this)

- 3.14 The Combined Authority will work with partners to scope out the terms of reference for this second phase of development of the Masterplan, bring these wider strategic themes and ideas into play.

Achieving our wider growth ambitions

- 3.15 For the area as whole there are also implications. If Cambridgeshire and Peterborough is to realise its growth ambition as set out in the devolution agreement with Government, the local Industrial Strategy, the Non Statutory Spatial Plan, and the Market Town Masterplans which underpin those, will need to evidence and describe where that growth will be realised within existing plans – and where it will be generated beyond existing plans.
- 3.16 Based upon the work to date to establish a Masterplan for St Neots, and the experience built up through the Wisbech 2020 Vision, it is proposed that the Combined Authority continues to advocate and implement a Market Town Masterplan approach that underpins future economic and strategic planning – where every town in Cambridgeshire has its own Masterplan that informs, and is informed by, the evidence base from the independent Economic Commission and our key county-wide strategies and plans:



- 3.17 It is proposed that the development of the remaining Market Town Masterplans is programmed for delivery during 2018, in alignment with the delivery of the independent Economic Commission, the Non Statutory Spatial Plan, and the Local Transport Plan.
- 3.18 It is proposed that as part of the budget preparation process and consultation for the next financial year, that proposals are brought forward to develop a Masterplan for every market town in the county.

4 FINANCIAL IMPLICATIONS

- 4.1 The report sets out a funding requirement for up to £5.8 million to bring forward the first phase of the Masterplan. It is not anticipated, however, that the Combined Authority will be the sole investor in this phase of the programme. Further, as set out paragraph 3.8, a number of funding mechanisms are being considered for this and other CA programmes that could reduce the call on the Authority's resources in the medium and longer term.

- 4.2 At this stage no provision has been made for funding the identified works within the Combined Authority's budget. As the programme moves forward further consideration will be given to this matter and the balance of funding requirements between the CA and other strategic partners.

5 LEGAL IMPLICATIONS

- 5.1 The Masterplan is a form of spatial planning policy, however as the Masterplan is proposed to be complementary to the Local Planning Authority's Local Plan policies, the development of the Masterplan is a decision which can fall within the Combined Authority's general power of competence.
- 5.2 The Combined Authority has a general power of competence by virtue of Article 7 of the Cambridgeshire and Peterborough Combined Authority Order 2017. This power enables it to undertake the recommendations outlined in this report.
- 5.3 The Masterplan is currently within the development phase and, as it will be brought back to a future Board meeting for funding and approval of the Masterplan, none of the recommendations in this report are key decisions and are therefore not subject to call-in by the Overview and Scrutiny Committee.

6 SIGNIFICANT IMPLICATIONS

- 6.1 There are no other statutory matters to bring to the Board's attention.

7 APPENDICES

- 7.1 Appendix A – Masterplan for St Neots (first draft)

ST NEOTS

MASTERPLAN FOR GROWTH



DRAFT

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EXECUTIVE SUMMARY

St Neots will be a sub-regional manufacturing dynamo, a town that interacts with neighbouring towns and cities as part of a balanced economic ecosystem, where local people work in local jobs and enjoy a vibrant and well-connected town with a thriving town centre

St Neots generates

£470m p.a. GVA

from over

10,500 jobs

Through the negotiation of the devolution deal with Government the Combined Authority has committed to double the size of the Cambridgeshire and Peterborough economy over the next 25 years, adding nearly £20bn of Gross Value Added (GVA). In return, the government has committed to invest £770m in the region to improve infrastructure, deliver more homes, increase skills levels and improve the quality of life for the residents.

The population of Cambridgeshire's ten market towns is set experience the same rate of growth as our two main cities and therefore the towns will contribute an equal share of economic growth. This growth needs to be met with renewed focus and strategic investment planning.

This Masterplan for Growth has sought to optimise the growth that can be delivered within the existing statutory framework including the local plan and neighbourhood plan.

As a result, the GVA will increase by £185m and the number of new jobs by 3,600. Compared to a doubling of the size of the economy of St Neots, it leaves a shortfall of £285m GVA and

4000 jobs. More work will therefore be required in the future to determine if and how this shortfall can be overcome and a subsequent update of the masterplan will be brought forward in 2018 to articulate how this can be achieved. This should not stop action being taken now to support

Our Place DNA findings, combined with on-the-ground interviews, visits and anecdotal opinions identified a thread of connected opportunities for St Neots that centre around the Place DNA themes of INDUSTRY, TRANSPORTATION, HOUSING and REGENERATION.

These themes have been used to form a connected series of remedies and actions that together provide an opportunity to grow St Neots to become an even greater contributor to the sub-region's growth.

This report sets out a clear vision and a set of principles of that offer transformational outcomes from working together towards a coordinated strategy. This first phase St Neots masterplan will revitalise the town square, open-up the waterfront and intensify the successful industrial spaces to allow business to grow and new business to move in to take advantage of the excellent skills and infrastructure network. It will support a unique combination of small and large-scale business growth, use growth to pay for new civic infrastructure, link skills development with employment growth and support community-led regeneration.

From an inter-regional perspective, the actions and programmes within the masterplan for growth will not only support the growth of the town and the other market towns, but will also support and engage with the future Cambridge, Milton-Keynes, Oxford (CaMKOx) growth and transportation corridor.

From a local perspective, the programmes set out for St Neots should be carefully combined and assessed against programmes for other market towns. This can only be achieved by carrying out similar economic and growth analysis for each town to identify local opportunities. Thereafter, the programmes will provide for complementary growth based on the strengths of each town working together within the County as a whole.

INDUSTRY

Phase 1

3600

local jobs growth by 2036

Producing

£150m p.a. GVA

INDUSTRY THEMES

i1 - SUPPORT THE MANUFACTURING BASE

i2 - PROVIDE SPACE FOR KIBS AND CREATIVE SECTOR

i3 - INTERCONNECTED TRAINING

The Place DNA analysis confirmed the strength of the manufacturing sector and the contribution that it makes to the local and regional economy. The analysis also identified a correlation between existing educational levels of the population to those used within the local industry. However, businesses pointed to a deficit in appropriate skills training that is aligned with business requirements.

Manufacturing provides 16% of the total jobs in St Neots and over 26% of Gross Value Added (GVA) generated by the town. St Neots is set for a 26% growth in population to 2036, primarily through the new housing development associated with the eastern expansion of the town. The new development will bring additional commercial floorspace and jobs. This provides an opportunity to stabilise and unlock growth in the manufacturing sector by coordinating the delivery of this new housing and industry with an improved local transportation infrastructure, a local training programme and a revitalised town centre. The projected jobs growth will provide opportunity for local people to be employed locally.

TRANSPORTATION

Phase 1

Capturing

30%

of the outward commuting would retain

1000 jobs

in town and generate over

£35m in retained GVA p.a.

TRANSPORTATION THEMES

t1 - CONNECTED PUBLIC TRANSPORT

t2 - PARKING STRATEGY

t3 - CAPTURE OUTWARD COMMUTERS

t4 - CONNECTION TO CaMKOx CORRIDOR

The Place DNA analysis identified a poorly connected local public transportation service and a high rate of car ownership per household. Additionally, the outward commuting of workers is substantial, which prompts a greater emphasis upon the poor local bus service.

St Neots is served by a fast rail link into London, which makes the town's location attractive for commuters (over 670,000 users per year). Capturing both the disposable income of residents and potential local workers is a component that is essential to creating GVA growth in the town. The limited public transportation links to and from the town centre to the train station, residential areas (old and new) and employment areas is hampering the connection of the town to its population. The new A428 improvements and potential CaMKOx corridor will bring with them economic opportunity. However, without a balanced and connected internal transportation system these new links may exacerbate the existing outward migration, by providing greater opportunity to commute, to the detriment of the vitality and viability of the Town Centre and local industry.

HOUSING

Phase 1

4000

housing units

will generate annual spending of over

£26m p.a. by 2036

1500 workers

will generate

£59.5m GVA p.a.

HOUSING THEMES

h1 - CONNECT INFRASTRUCTURE

h2 - INTEGRATE SERVICES

The Place DNA analysis identified that the house prices at the higher end of affordability, which places pressure on the level of earnings required to purchase a home. This in turn promotes outward commuting to higher paid employment.

The eastern expansion of the town, primarily with housing development has the potential of widening the disconnect between east and west of the Town. The District is aware of this potential and engaging with the development team to co-ordinate development with the needs of the town. Initiatives contained in this Masterplan for Growth should be considered when negotiating development agreements. Moreover, it is important that all new and existing residential areas are integrated into the local transportation system. In addition, changing working and operational structures are affecting and will further affect the location and scope of provision of primary care services within the St Neots area. These changes will also affect how the town fits into the hierarchy of service provision for outlying areas. The ongoing rationalisation of accommodation may free up buildings that could be included in wider redevelopment opportunities.

REGENERATION

Phase 1

A co-ordinated regeneration programme will add up to

£50m in GVA p.a. by 2036

REGENERATION THEMES

r1 - TOWN CENTRE REGENERATION PROGRAMME

r2 - DIVERSIFICATION OF RETAIL AND LEISURE OFFER

r3 - PEDESTRIAN CONNECTION

r4 – HIGH-SPEED BROADBAND

The Place DNA analysis identified a number of negative indicators that point to the town centre being under stress. The low diversity of uses within the Market Sq area, a declining footfall and low retail lease values, pedestrian connectivity from the east to west, traffic congestion at peak periods and vacant buildings causing blight, add up to an underperforming town centre. The town is covered by a broadband network that has pockets of very low upload/download speed.

It follows that a major recommendation of this report is the need to make the town centre more attractive to the existing resident, new resident, worker, employer and visitor alike. Actions are aimed at increasing footfall in and around the Market Square. through improved pedestrian links, better public spaces, bringing derelict buildings back into use and intensifying the use of available town centre development sites for a blend of modern community, retail, leisure, artisan production and office space for creative /knowledge industries to move into the centre.

INTRODUCTION

Historically, and recently even more so, cities have been viewed as the inherent drivers of the national economy, places where production and industry shape society, housing and culture. They stand top of a hierarchy of towns, villages and smaller settlements, each feeding into the other, supporting the economies of all.

Moreover, since the 1990's, cities have become the primary focus for major economic regeneration initiatives and investment. The market, property values and the phenomenon of economic agglomeration have generated a well-oiled economic growth machine. Which is not surprising, as cities account for over 60 per cent of economic output despite covering just 8 per cent of land.

Cities have not grown at equal rate, significant growth has occurred in the most successful, including Cambridge and Peterborough. The growth rate has become so great in these cities that the land and space available to accommodate this growth in a sustainable economic form is becoming harder to find. At the same-time the surrounding towns are being left to face this expansion without being able to fully benefit from their position in the economic hierarchy to assist in the distribution of this growth.

As an answer to this issue we should start to re-enforce the historic hierarchical position of the market towns as centres of local activity, trade and social interaction. The protection provided by the market charters, which have prevented other markets operating within a radius of 6.2 miles, have created a locational benefit for the market towns in that they are precisely positioned to contribute to the wider economy without competing against themselves. By improving regional and local transportation links, housing and education we will deliver jobs and prosperity to the market towns and their neighbours.

To frame this effort Inner Circle Consulting have been commissioned by the Cambridgeshire and Peterborough Combined Authority (CA), with the support of Huntingdonshire District Council, to deliver a Masterplan for Growth for St Neots market town.

Underpinning the Masterplan for Growth in St Neots are the Draft Huntingdonshire Local Plan, the adopted St Neots Neighbourhood Plan, the Third Cambridgeshire Local Transport Plan and the Greater Cambridge and Greater Peterborough Local Enterprise Partnership Strategic Economic Plan. This document incorporates recommendations that will implement objectives outlined in those plans as far as they reference growth.

BACKGROUND

The future for St Neots is an exciting one. The town lies at an infrastructure crossroads linking Peterborough and the north to London in the south. St Neots is strategically positioned to benefit from the sphere of influence of the proposed CaMKOx economic development corridor between Cambridge in the east to Milton Keynes and Oxford in the west. The Town has a strong manufacturing sector and there is potential for growth in key industries. It has outstanding natural features with the river and green spaces that run through the heart of the historic market town, making it an attractive place to live.

However, somehow St Neots has more to give.

Notwithstanding the towns tremendous manufacturing base, the knowledge economy is suppressed, lacking suitable premises and the Town Centre has not kept pace with modern community and consumer needs. The historic market square lacks vibrancy. There are derelict buildings in prominent positions and the river remains an under-utilised asset. The distribution of different land uses is disconnected by transport routes creating the feeling of congestion, despite a relatively low-density housing stock. Residents are concerned about access to important public services like GPs and schools.

So how can St Neots achieve good growth that boosts the economy, increases the number of high quality jobs for local people and take advantage of its natural assets to become a thriving market town?

Cambridge and Peterborough have achieved strong growth in recent years. Cambridge is a particularly clear example of how cities are succeeding in the knowledge economy through the concentration of human capital, space for growing high-tech enterprise, good quality services and strong partnerships between academic institutions, enterprise and city managers. However, St Neots, as one of Cambridgeshire's market towns has seen more marginal economic growth.

Economic growth creates prosperity for individuals and families. Business growth leads to more employment, which is important for health and wellbeing. Appropriate growth can transform lives. However economic growth is hard won and the benefits of growth do not necessarily benefit all without careful planning of local services and education / skills development for the population.

A positive planning regime that enables innovation and growth whilst protecting our historic and natural assets is essential, and in that respect Huntingdonshire District Council is prepared to become a facilitating partner.

This report sets out a commitment to delivering growth for the benefit of each and every resident.

This is the first masterplan for a market town in Cambridgeshire, others will follow. Each masterplan will be tailored for each town and support a unique combination of small and large-scale business growth, provide civic infrastructure, link skills development with employment growth, allow innovation to thrive, deliver community-led regeneration and places with culture and well-being at their heart.

The principle of this study is the assertion that funds directed for re-investment in the town and community will be reinforced and multiplied with the achievement of economic growth. This means that new jobs must be created for people who live in St Neots so that the value (GVA) that they create will be retained by the town.

The Combined Authority can be a powerful catalyst for change, but only if its efforts are joined with local circumstances and actions, and can realise a series of short, medium and long-term change that has a tangible benefit for all.

THEMES FOR GROWTH

Here the report describes the findings for each of the four growth themes and connects the data analysis and engagement findings to programme level interventions.

INDUSTRY THEMES

- i1 - SUPPORT THE MANUFACTURING BASE
- i2 - PROVIDE SPACE FOR KIBS AND CREATIVE SECTOR
- i3 - INTERCONNECTED TRAINING

TRANSPORTATION THEMES

- t1 - CONNECTED PUBLIC TRANSPORT
- t2 - PARKING STRATEGY
- t3 - CAPTURE OUTWARD COMMUTERS
- t4 - CONNECTION TO CaMKOx CORRIDOR

HOUSING THEMES

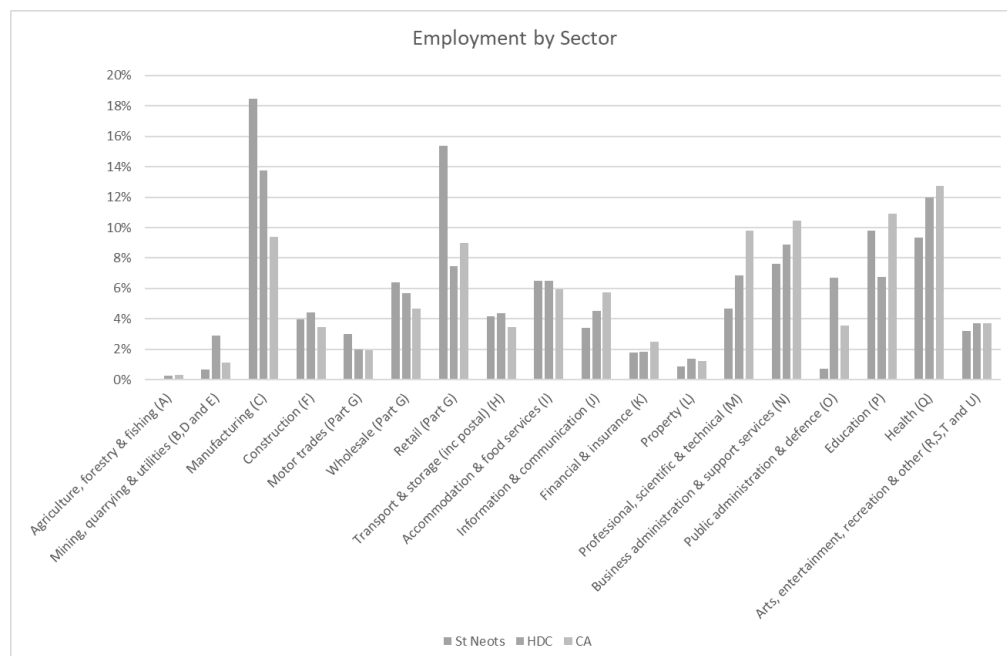
- h1 - CONNECT INFRASTRUCTURE
- h2 - INTEGRATE SERVICES

REGENERATION THEMES

- r1 - TOWN CENTRE REGENERATION PROGRAMME
- r2 - DIVERSIFICATION OF RETAIL AND LEISURE OFFER
- r3 - PEDESTRIAN CONNECTION
- r4 – HIGH-SPEED BROADBAND

INDUSTRY THEMES

The importance of the manufacturing sector in the town is reinforced with a location quotient of 1.9. A Location quotient (LQ) is a simple ratio used to determine the concentration or dominance of an industry in a defined area (St Neots) in comparison to a larger reference or benchmark region (Combined Authority - CA). In general, an LQ above 1.5 indicates that there is a degree of specialisation or concentration in that industry within the Town. The sector also contributes significantly to the wider economy. It should also be noted that the distribution of high-growth tech firms is changing, with increasing representation from diversification in general manufacturing companies, purely from the upgrading of process methodology and machinery. This re-distribution over the boundary of what is defined as manufacturing, presents opportunities for new growth.



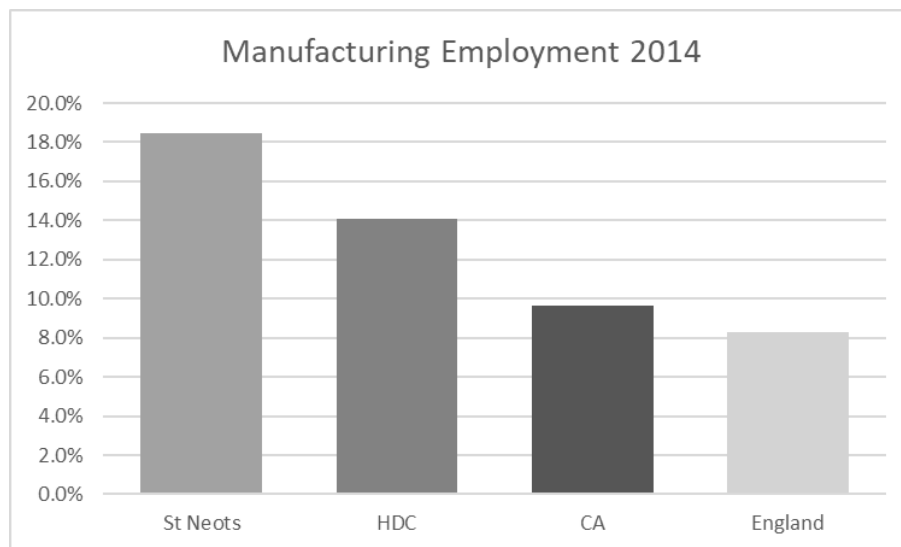
The knowledge intensive and business support (KIBS) sector is the sector that is growing the fastest nationally in terms of GVA. This is reflected in St Neots with a local growth rate of 34% in industries that support KIBS from 2013 to 2014, compared to an overall growth rate of 13% in all sectors in the Town. However, the LQ for these KIBS supporting industries in St Neots is only 0.6, which identifies the potential for further local growth.

A component and contributor to the KIBS sector is the creative sector, St Neots has an active creative sector community that should be engaged to partner and to facilitate additional growth. While not being a significant contributor to the local GVA there is a synergy between the manufacturing and KIBS sectors that should be exploited. We recommend that the following actions are prioritised through partnerships between the CA and entities that are

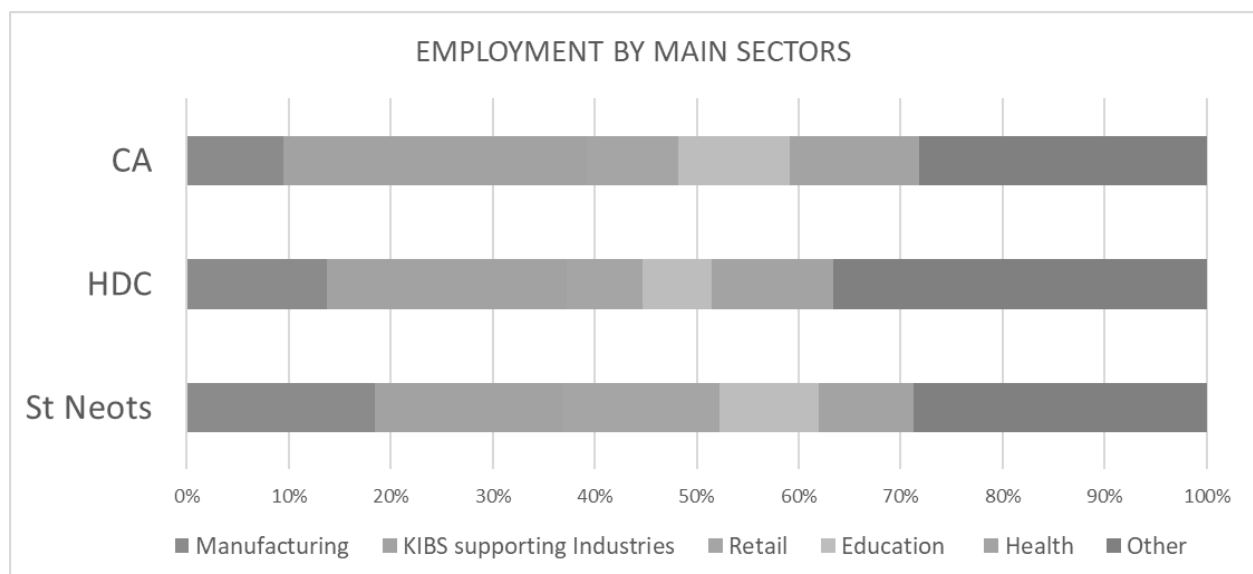
responsible for delivering. If the actions are implemented then they will grow the manufacturing sector between 0.7 % and 1.1% p.a. to 2036. thereby delivering an additional 300 - 500 local jobs and adding a cumulative GVA to the towns economy of between £190m and £300m.

Interviews with local businesses revealed a lack of industry ready training and local training facilities that industrial companies could utilise. The creation of a local presence in high level production and manufacturing related skills training would assist local companies to connect and engage with the local community and workforce increasing the number of jobs for local people and associated GVA retained in the St Neots economy

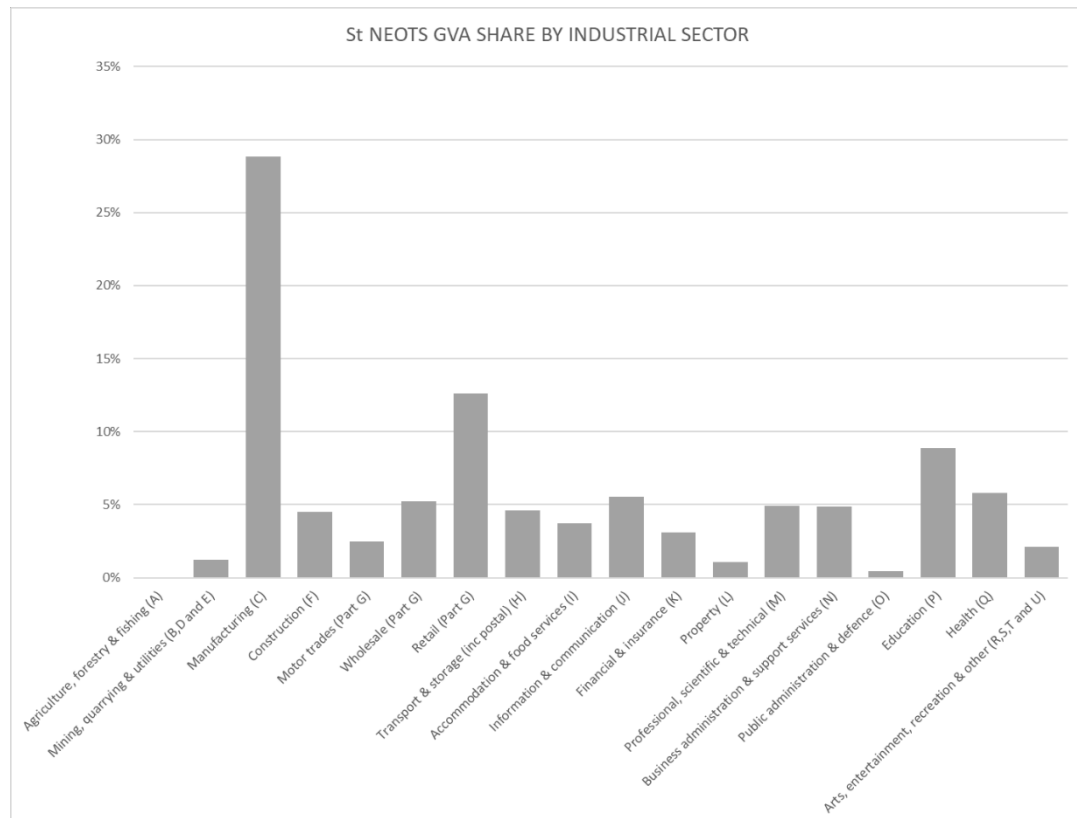
THEME i1 - SUPPORT THE MANUFACTURING BASE



A solid characteristic of St Neots is the substantial engineering and manufacturing sector. The sector is varied but has concentration in the paper and plastics container and packaging sector and motor vehicle repairs. Many multi-national companies operate in St Neots. For example, Sealed Air are a global company and the inventors of 'Bubble Wrap' and other packaging products.



The manufacturing sector provides almost 30% of the Town's GVA and over 20% of Huntingdonshire's GVA. In this respect, the manufacturing base in St Neots is to be considered as a micro agglomeration and as such industrial land and buildings will need to have greater support from across the public sector to continue to grow and thrive. From a sub-regional perspective, the contribution of the St Neots manufacturing base plays an



important role in the balance of the overall economy of Cambridgeshire and Peterborough.

The comparison also points to a high proportion of out commuting is within the knowledge intensive sector.

A concern is the substantial market pressure aimed at conversion of commercial and industrial land use to residential. For example, a 2.6ha industrial property on Cromwell Road in the primarily industrial area is being marketed as potential residential development. To limit manufacturing loss and therefore a stalling of the Masterplan for Growth, a review of the St Neots Neighbourhood plan should be carried out to examine how it can help to protect the existing industrial land and buildings during a period of stabilisation, growth and transformation. The sector will also require support with direct intervention in the location and form of training facilities/programmes that are provided.

The impact of BREXIT may cause repatriation of business and issues with labour supply, which may be exacerbated by worker immigration restrictions. When viewed at a macro-economic level the importance of the manufacturing sector in ST Neots becomes more

evident. Some 8% of all UK employment, and 10% of GVA, is in the manufacturing sector (more than 50% of local jobs in St Neots are within the manufacturing sector), with an increasing level of this being becoming high-tech manufacturing, maintaining a competitive position in the world market.

The EU is the UK's biggest trading partner, with 44% of all goods & services exported to the EU, and 53% of imports. However, on the flipside of this - half of all manufacturing exports are to markets outside the EU. See Appendix A for Brexit Overview. New trade deals may necessitate the repatriation of businesses to the UK for them to take advantage of any new trade deals' requirement for the majority of the product to be exported to be produced within the UK (from components made in the UK). This will also positively affect spin-off component supply companies that will locate in the same area.

To retain and consolidate manufacturing businesses within the local area, particularly in the context of exiting the EU, a reduction of congestion and investment in public transport will be an essential part of this report's recommendations.

Maintaining St Neots' competitive advantage will only be achieved through the retention and consolidation of the manufacturing industry, particularly in relation to the town's location and transport links. It is therefore also essential that the improved communication with Cambridge afforded by future A428 improvements, and ultimately implementation of the Cambs-Oxford corridor, is planned for and taken advantage of.

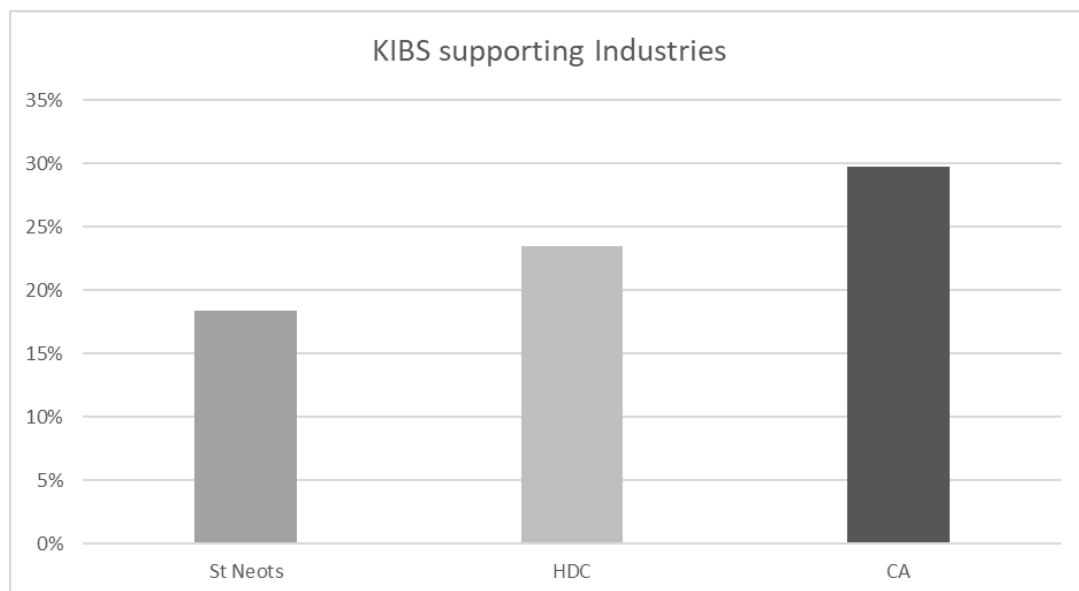
In respect of the manufacturing sector we recommend that there is a commitment to retaining and expanding the manufacturing sector by protecting existing industrial land allocations. The industry is going through rationalisation in terms of technological production improvements, this will lead to a reduction in required production area floor-space and increased productivity, resulting in the sharing of space and buildings for connected and supporting uses. The manufacturing sector will benefit from existing micro agglomeration in the container packaging and instrument manufacturing sector and population growth at 3% pa to 2021 and thereafter at just under 2% to 2031 where it stabilises. Integration of skills training within industrial park location.

The Masterplan for Growth, together with the Huntingdonshire Local Plan, will ensure that there is a supply of affordable sites and accommodation, which offers variety in terms of type and scale to be able to offer a 'pathway' for expanding businesses to encourage them to stay in the area and facilitate local supply chains and bring agglomeration benefits.

Local training will be developed to support the local labour force, both to offset the impact of Brexit and encourage growth. The potential decline in available labour requires the retention and development of a labour force equipped with the requisite skills to support local industries and therefore future growth. The Masterplan for Growth will set out to support the provision of local facilities and resources for targeted training.

The target of this Masterplan for Growth is to maintain the manufacturing base and aim for GVA growth of 1.1% pa to 2036. The implementation of the CaMKOx corridor should be supported and planned for as the corridor will contribute to a further and sustained acceleration of growth for the town and its environs.

THEME i2 - PROVIDE SPACE FOR KIBS AND CREATIVE SECTOR GROWTH



KIBS are defined as businesses or enterprises whose primary value-added activities consist of the accumulation, creation, or dissemination of knowledge for the purpose of developing a customized service or product solution to satisfy the client's needs. The category is particularly difficult to measure at a low census area level so we have focused our comparisons on the following industrial sectors that support KIBS employment; professional Information & communication, financial & insurance, professional, scientific & technical and business administration & support services. It is important to note that the manufacturing sector can also generate KIBS employment directly within its sector through research and development and product design activities.

The Creative Industries were defined in the Government's 2001 Creative Industries Mapping Document as "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property".

A comparison of employees within KIBS supporting sectors (Information Technology, Financial, Property, Professional Scientific and Business Support) identifies that locally based employment within the Knowledge Intensive and Business Support (KIBS) sector is particularly under-represented in St Neots. The town has an inherent, but comparatively low local job provision in this sector when compared to both Huntingdonshire and the Combined Authority.

DIRECT KIBS EMPLOYMENT

ST NEOTS

TOTAL COMPANIES: 23

TOTAL EMPLOYEES: 31

EMPLOYMENT



The underperformance in the KIBS sector is demonstrated by the number and size of companies that are in the town that are directly linked to this sector. The issue is that most of the workers in this sector have no alternative than to commute out of town. This outward migration (estimated at 380 KIBS sector jobs out of 2819 in total) means that GVA is created and delivered out of town with, more importantly, approximately 25% of the total GVA generated being left outside of the region. The limited supply of attractive, appropriately located workspace, with suitable lease arrangements, is adding to this outward migration. If the under-represented KIBS sector can be supported, by the provision of suitable accommodation, then the town should capture a share of the 400 KIBS jobs within the outward migration.

There is opportunity to capture a small but significant number of KIBS and Creative sector jobs within the town. Demand for workspace is inherent and being actively sought by individuals, mainly sole proprietors, within this sector. The issue facing this demand is the lack of small flexible creative units within the town centre. The Masterplan for Growth will support the creation of space to accommodate KIBS and related CREATIVE INDUSTRY sector jobs with the identification and establishment of small flexible units managed by the Town. Moreover, the existing under-supply of accommodation for this type of work space will be

pressured by population growth and new housing supply close to the railway attracting skilled commuters who will ultimately seek work more locally if the opportunity to do so exists. It is projected that this sector will experience between 2% and 2.5% GVA growth per annum. Retention of this growth in town and locally will depend on local transportation connectivity and suitable town centre floor-space. In the future, the CaMKOx corridor will help to stabilise and add to this growth. Importantly, additional job growth in this sector will add spin off jobs in other supporting sectors.

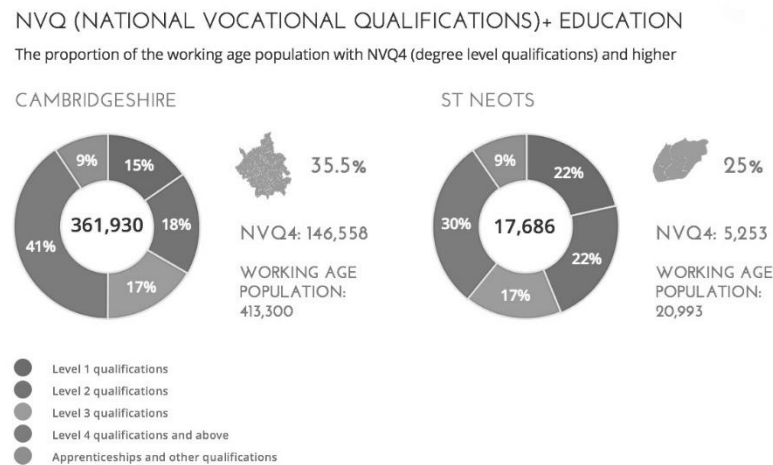
The recommended actions will create the environment to accommodate and attract 'creative' and KIBS sector jobs that can co-locate with the existing manufacturing base. The target will be to increase local workplace employment by 200 jobs by 2036. The programmes will aim to reduce outward migration from the town to support local GVA growth. However, it should be noted that while growth in this sector will be greater than in the industrial sector, the proportional impact of GVA growth to the town's overall economy will be far less than that experienced by the larger local industrial sector.



THEME i3 – CONNECTED TRAINING

There is a lack of training that is 'industry ready'. Industry leaders in the town have expressed concern over the limited availability of trained labour that is suitable for the type of production and design work required. However, this is balanced by comment that businesses are very willing to support their employees in advancing and undertaking job-related training. The issue is that suitable training facilities are located out of town. The education levels of resident working age population and the education levels of local employees show similar distribution. However, we know that workers are travelling in and the manufacturing

industry state that they recruit out of town. This indicates that manufacturing industry ready skills are not aligned locally.



The proposed training programme will ensure that St Neots retains and trains the local workforce to be industry ready to support the growth of the primary industrial manufacturing sectors. The programme will establish connections with training partners and will facilitate local training facilities that are physically integrated with the manufacturing industry. A future phase of the growth plan would be to construct a stand-alone training facility that will provide an appropriately skilled workforce pool.

PROGRAMMES

- **SHORT-** Create register of unused floor-space within existing industrial units that is available for occupation by training, KIBS and creative sectors.
- **SHORT –** Locate and manage additional flexible creative work space in the town centre to accommodate creative use and establish demand, integrate local networking group (The Neotists) as project co-ordinators.
- **SHORT –** Prepare policy commentary to HDC Local Plan consultation that supports the protection and intensification of existing industrial land.
- **SHORT –** Confirm training partners (with providers, St Neots Manufacturing Club) and co-ordinate with LEP
- **MEDIUM –** Locate local industry targeted training within industrial park, possibly utilising unused industrial floor-space for on-site training programme. Fund through subsidy or through grants.
- **MEDIUM -** Report on the role of the St Neots manufacturing sector within the Industrial Strategy for Cambridgeshire and Peterborough, to be produced by the independent Economic Commission.
- **MEDIUM –** Review and amend St Neots Neighbourhood Plan to align with the recommendations of the Masterplan for Growth.

- MEDIUM - Support the St Neots Manufacturing Club in their efforts to bring together a regional training programme.
- MEDIUM – Create a local KIBS and Industrial partnership initiative to help these local sectors associate and grow together. Refine a strategy to attract specific creative and KIBS industries to work with the existing manufacturing base. Further strengthening a micro agglomeration which will feed into the wider Cambs economy.
- MEDIUM – Assist in the identification and preparation of grant applications to future fund accommodation and resources.
- LONG – Expansion of training programmes and construction of a bespoke training facility to support supplementary manufacturing activity, including KIBS and creative industry sectors, which will emerge because of the implementation of the masterplan for growth and CaMKOx corridor.
- LONG – Monitor KIBS sector employment and GVA.
- LONG – Support CaMKOx corridor and promote inter-sector communication through CA and LEP outreach.

TRANSPORTATION THEMES

The recommendations are to enhance connectivity in the town by improving public transport links between key locations such as existing residential areas, new housing development, the train station, schools, health facilities and the Market Square. It is also recommended to provide flexible parking (within an appropriate parking strategy) to support town centre shops and businesses during a period of regeneration. The outward travel to work means that GVA is created and delivered out of town. More importantly, approximately 25% of the total GVA generated by the local workforce is being left outside of the region.

The roadway infrastructure in and around St Neots suffers from congestion at peak times. The connectivity between the east and west sides of the town is restricted by the single roadway bridge crossing. The congestion is exacerbated by the poor local bus service between neighbourhood residential areas (new and old), the Market Square and the railway station. The Market Square has capacity and infrastructure to act as a hub but does not have adequate public transportation service to counter the use of private cars to access the shopping and services offered in the town centre. Additional housing development with the eastern expansion of the town will exacerbate the congestion if a town wide public bus service and connected pedestrian and bicycle system is not implemented.

THEME t1 - CONNECTED PUBLIC TRANSPORT










The existing bus services are focused on the main thoroughfares and do not provide direct and regular connection to the residential neighbourhoods. The proportion of households that do not have access to a car is 22% in St Neots, compared to 14% in Huntingdonshire. The proportion of households that have access to 2 cars or more is also lower. Therefore, households are more dependent on the use of a single car, which provides opportunity to encourage other forms of transportation.

CONNECTIVITY – BUS

Assessment of connectivity

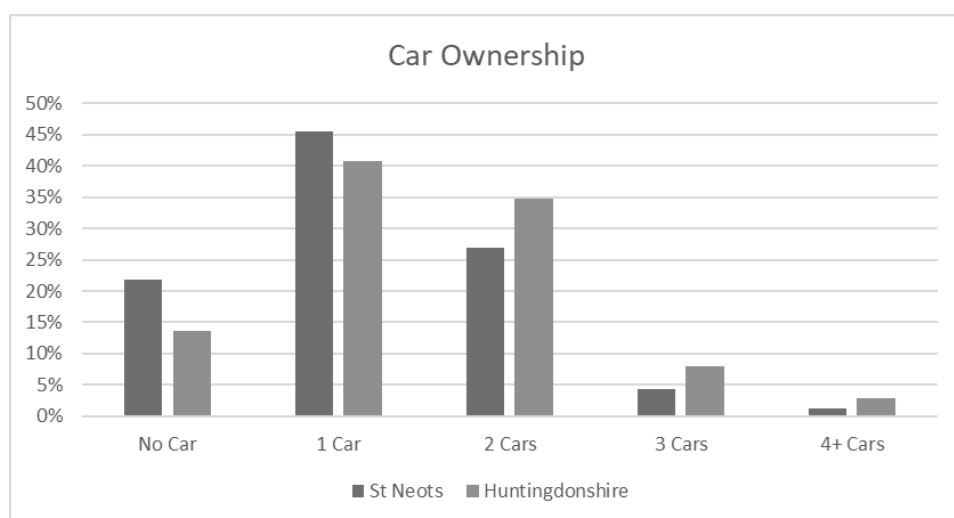
ST NEOTS

BUS ROUTES FREQUENCY

	6	—
	62	—
	63	—
	61	—
	150	—
	C2	—
	X5	—
	66	—
	65	—



The recommendation of this report is to provide a bus service 'loop' on both sides of the river that will connect residential areas to the Market Sq, which will be used as a transportation hub. The loops would also connect to employment areas and to the train station.

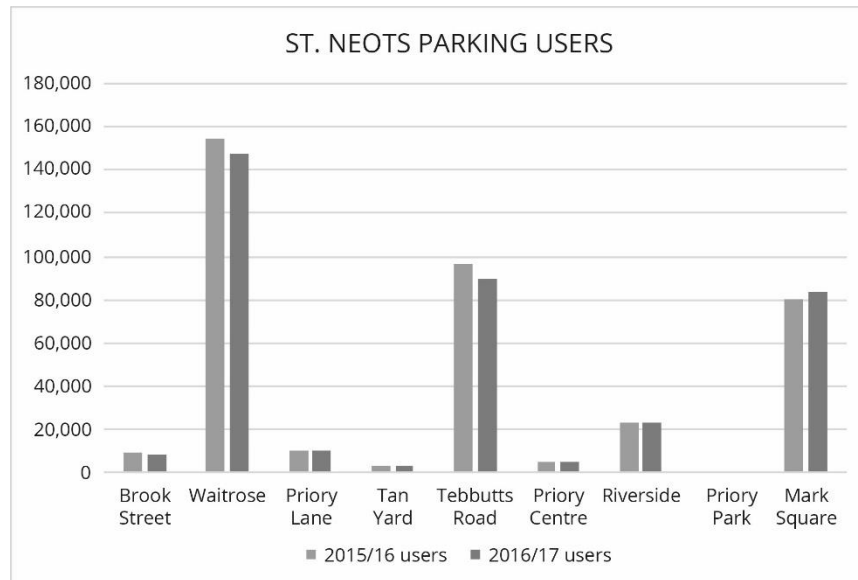


THEME t2 - PARKING STRATEGY

The town is suffering from decreased footfall into the Market Sq. The perception of many, both councillors and business groups, is that the parking charges as levied on the town centre car parking is a primary causation of the decline in footfall. However, parking use at the Town Centre car parking locations saw a decline of less than 1%. Footfall is declining steadily, and at a faster rate, notwithstanding the increase in the towns' population. From this a correlation can be made between the use of car parks and the decline in footfall, in that people are visiting the town but are not making multiple stops during their visit. The low volume of parking users at the Riverside has remained constant, which indicates a lack of connectivity to the town centre. Of significance and associated to town centre attractiveness and therefore its ability to maintain footfall is the fact that the diversity of shopping offers in the town centre has also declined. It is important to note that neighbouring town centres of Huntingdon and St Ives have maintained a reasonably consistent level of footfall.

Huntingdonshire District Council are presently undertaking a parking strategy review and assessment which should be used to feed into the outputs of this document. However, our preliminary analysis of the parking activity in town does not support the local perception that footfall decline is entirely being caused by the application of parking charges in the town centre area, but more likely by the lack of diversity in the town centre store front offer.

The recommendation is aimed at delivering adequate parking and flexible charging to meet and changing demands of the emerging regenerated town centre. The resultant parking strategy will need to create an uplift in footfall within the Market Sq. location leading to an increase in the attractiveness of shop fronts in that area. The control of on-street parking in the Market Sq. area will be an important component.



THEME t3 - CAPTURE OUTWARD COMMUTERS

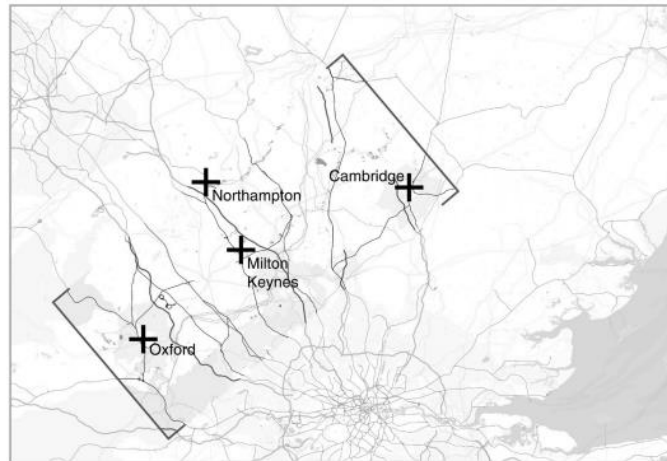
Almost 3000 people travel out of St Neots for work each day. Of these 75% of the trips are to the Eastern region. We find that work based net migration to Bedfordshire is similar of that to London. Local bus services that connect existing residential areas to employment, the Market Square and the train station are insufficient and infrequent. St Neots stands at a communication crossroads, being well connected to the region by road and rail. However, this regional connectivity is not supported by an integrated local connectivity.

Regionally, the Highways Agency plans to increase capacity of the A428, starting work in 2020, which will improve east-west travel and connection to Cambridge and the A1 by reducing major delays during peak periods. It is vital that the local infrastructure is placed to take advantage of this increased connectivity and the future CaMKOx corridor, so that inward migration can increase and local work-related travel is retained.

OUTFLOW FROM ST NEOTS		INFLOW TO ST NEOTS		NET MIGRATION	
North East	7	North East	3	North East	-4
North West	22	North West	35	North West	13
Yorkshire and The Humber	15	Yorkshire and The Humber	12	Yorkshire and The Humber	-3
East Midlands	187	East Midlands	316	East Midlands	129
West Midlands	41	West Midlands	37	West Midlands	-4
East (Not Including St Neots)	7068	East (Not Including St Neots)	4926	East (Not Including St Neots)	-2142
London	699	London	46	London	-653
South East	255	South East	105	South East	-150
South West	27	South West	27	South West	0
Wales	5	Wales	9	Wales	4
Scotland	9	Scotland	0	Scotland	-9
Northern Ireland	0	Northern Ireland	0	Northern Ireland	0
OUTFLOW	8335	INFLOW	5516		-2819

THEME t4 - CONNECTION TO CaMKOx CORRIDOR

The National Infrastructure Commission (NIC) has provided central government with proposals and options to maximise the potential of the Cambridge, Milton Keynes, Oxford



Source: 5th Studio

corridor as a single, knowledge-intensive cluster that secures homes and jobs. The proposals were provided in an interim report 'CAMBRIDGE – MILTON KEYNES – OXFORD CORRIDOR', which found:

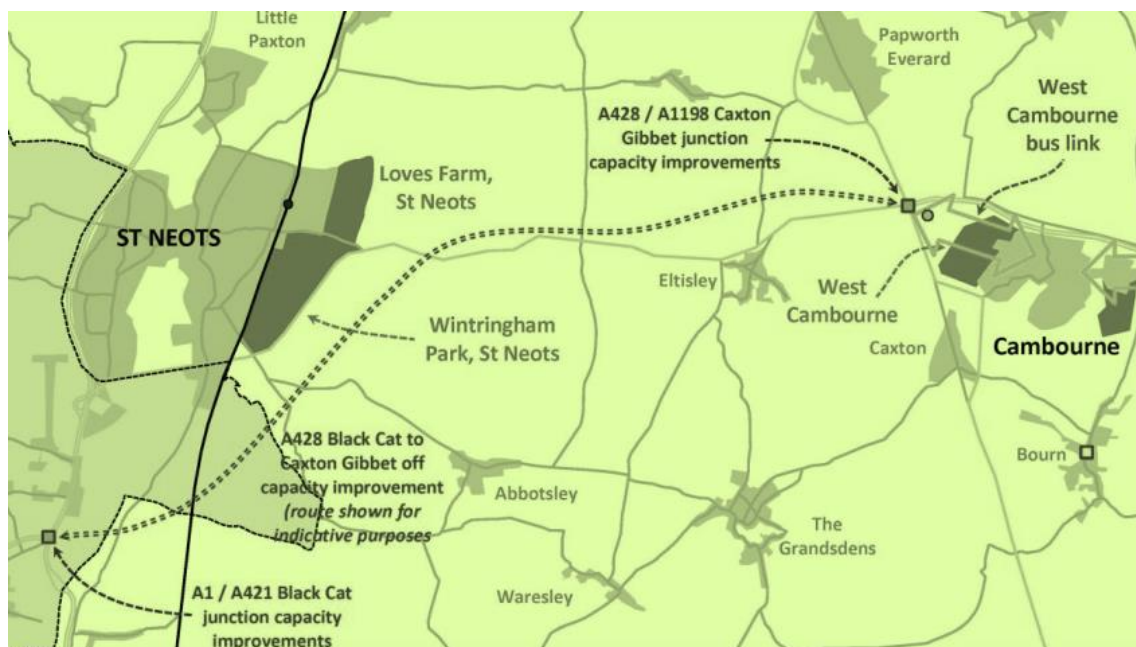
'Without a joined-up plan for housing, jobs and infrastructure across the corridor, it will be left behind by its international competitors. By providing the foundations for such a strategy, new east-west transport links present a once-in-a-generation opportunity to secure the area's future success.'

This document is the perfect vehicle to support and facilitate the joining up of resources to help define a set of coherent local transport strategies that align with local community and housing needs. At the same time, this report is ensuring that national and regional level schemes are properly integrated into local thinking.

These strategies should be consistent with wider work to develop a plan for the corridor that maximises its potential to support housing growth. This masterplan for growth should be viewed as a support to the Cambridge-Milton Keynes-Oxford study.

The NIC report also outlines that:

‘Local authorities and developers have identified the capacity of the current east-west route as a constraint on local growth. Analysis suggests that without intervention, key sections of the route will be operating beyond capacity by 2035. This includes the single carriageway and expressway sections of the A428 that connect Cambourne to the A1.’



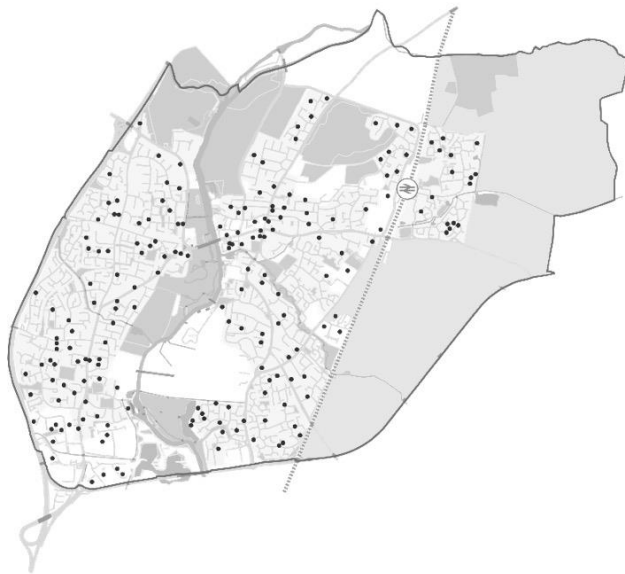
It is essential that any strategy prioritises that local public transport connects residential areas (existing and future) to the town centre, community facilities, health services and peripheral employment hubs. Our recommendations promote the integration of the rail station and new residential developments that are planned as part of the eastern expansion of the town, so that they contribute more directly to the whole town. The outcome will be local transportation infrastructure that is also flexible and resilient enough to take advantage of a future connection with the CaMKOx corridor. The corridor will depend upon local transportation to be able to contribute to the regional connection. This will be achieved in St Neots, in the short and medium term, with the identification and implementation of a public bus service that connects existing residential neighbourhoods and future housing development with employment, community facilities, health services and the town centre.

PROGRAMMES

- SHORT – Identify routes, timings and costs for subsidised local bus service that uses the Market Place as a central connecting hub.
- SHORT – Ensure alignment of existing development applications with the masterplan for growth and the future CaMKOx corridor.
- SHORT – Contribute to the District Councils parking strategy that supports visitor engagement with Town Centre and thereby increases opportunity to generate footfall, potentially by subsidisation of free short-term parking in certain car parks if supported by the Town Council.
- SHORT – Enhanced events programme to animate important public spaces including the Market square and riverside area.
- MEDIUM – Implement local bus service and monitor usage.
- MEDIUM – Co-ordinate, prioritise and design all infrastructure projects with future connection to the CaMKOx corridor in mind through a connective transportation programme.
- MEDIUM – Implement targeted on-street parking enforcement and restriction.
- MEDIUM – Implement subsidised free parking and monitor usage and footfall.
- LONG – As part of the regeneration programme examine the construction of a multi-storey Car Park within town centre location close to Priory Centre or at the Riverside location connected by the proposed footbridge link over the river.
- LONG – Integrate local transportation with CaMKOx corridor.
- LONG – Ensure new developments and planning applications prioritise the support of the local public transportation network through appropriate tools. Allocate CIL to support public transportation infrastructure.

HOUSING THEMES

The Huntingdonshire Housing Land Supply Position August 2017 estimates a housing delivery trajectory of almost 4000 for St Neots to 2036. The new homes will be primarily delivered with the Huntingdonshire Local Plan Draft allocated eastern expansion of St Neots over the next 20 years. The new homes and population growth will bring almost 1500 working age adults into the town during the same period. However, the feeling in the town is that the existing new housing developments to the east have not been adequately connected to the town, socially, economically and physically. The concern, already being addressed by the District, is to ensure that the eastern expansion of the town is carried out in a way that these connections are reinforced not driven further apart. A successful integration will add significant value to the regeneration of the town centre through increased footfall and disposable income capture.



THEME h1 - CONNECT INFRASTRUCTURE

St Neots will need to be positioned to capture a greater percentage of the economic benefits delivered through the eastern expansion of the town. The housing affordability ratio in St Neots is high at 9.7 times earnings, while the affordability ratio in Huntingdonshire is lower at 8.3 times earnings. Property asking prices in the town have risen by 41% between 2006 and 2017. The high housing affordability ratio and high outward travel to work both support the observation that new development in St Neots is primarily of market interest as commuter accommodation. That is, higher paying jobs are required to bring the affordability ratio down. At the moment, higher paying jobs are more likely to be located out of town. It is therefore vital that new housing development is supported and connected, through an improved transportation system to local employment prospects. If the local transportation issue is not addressed then many of these new residents will take advantage of the good regional connections to travel to work outside of the town. The new residents will create a potential £59.5m in GVA.

New residential developments need to be designed to be connected to the town centre and that communication and transportation routes are multi-modal.

THEME h2 - INTEGRATE SERVICES

The plan will also ensure that improvements and benefits to the local economy are not outweighed by demands on social and public health resources. A significant intervention will be to ensure that the local population have access to Council and Social support.

The NHS are facing a change in how primary care is operated and staffed. There is a move away from traditional 'buy-in' practices to a model that leases facilities and co-locates with other medical offices. The working arrangements of doctors is also changing away from being a partner to being an 'on-call' resource. The attractiveness of a location is also proving to be a large factor in recruitment and retention.

The Masterplan for Growth will ensure that the programme to centralise primary care facilities is carried out in co-ordination with CCG and NHS and that any facility is located in an area that is supported in its connectivity to the local population. The Masterplan will also assist in the co-ordinated disposal/redevelopment of property that is vacated as part of the planned consolidation.

PROGRAMMES

- SHORT – Define public health monitoring measures that are economically driven and which co-ordinate with the masterplan for growth.
- SHORT – Confirm primary care delivery plan with CCG NHS
- SHORT – Facilitate a connection point to direct relevant support requests to the District Council.
- MEDIUM – Ensure that development proposals and planning approvals are measured against public health monitoring measures deal adequately with the increased pressures placed on infrastructure and social/health services.
- MEDIUM – Co-ordinate delivery of centralised facilities through development and planning application process. Identify properties that are likely to be vacated as part of re-structuring of service.
- MEDIUM – Include in the One Public Estate approach to the use of public assets.
- LONG – Integrate primary care delivery plan and the re-use of vacated primary care facilities into regeneration programme.
- LONG – Ensure CIL revenue is targeted to a connective infrastructure programme.

REGENERATION THEMES

The town centre is suffering from a decline in footfall, which is affecting its vitality and viability. The largest vacant building in the town centre area is in a prominent position on the Market Sq. The town needs to address this by producing a town centre that has a greater diversity of uses but retains local character. A new balance of community/retail/service/creative offer will emerge. This will be primed and facilitated by a cohesive redevelopment of the central area to accommodate additional capacity. As a result, footfall will increase and town centre floor-space rateable values will improve throughout the centre and not only on the High Street. The Market Sq. will become the focus point for economic activity in the town, connected to the northern side by a boardwalk that extends along the waterfront to the Priory Centre and associated facilities. More activities and variety of uses will be accommodated on the Market Sq. itself.

THEME r1 - TOWN CENTRE REGENERATION PROGRAMME

The programme will enhance the market and its surroundings by encouraging a cultural offering, spreading commerce and culture onto the riverbanks to create new enterprise opportunities for cultural experience for residents and visitors. It is important that St Neots becomes an affordable place to grow a family and a business that will thrive in the wider Cambridgeshire growth phenomenon. The regeneration programme will build on the immense local pride by enhancing civic infrastructure along the river and increasing the number of events and festivals that show off what St Neots offers.

The focus of the regeneration programme will be the stabilisation of footfall, greater diversity in shopfront occupiers around the Market Sq. Greater integration of the river asset and associated events into the commercial activity of the town centre.

RENTAL VALUE: RETAIL RENTS

ST NEOTS TOWN CENTRE



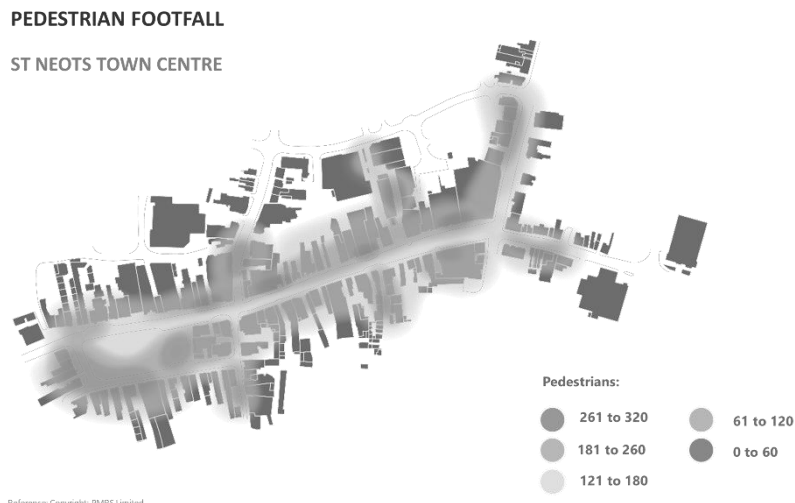
THEME r2 - DIVERSIFICATION OF RETAIL AND LEISURE OFFER

The decline in the Market Square area has been significant and is compounded by the low diversity of shop front uses in this locality and a vacant property that is of some significance (the Old Falcon). The shopping offer around the Market Sq. area is dominated by estate agency uses (38% of the building frontage). The footfall adjacent to the area around the vacant and significant 'Old Falcon' building is significantly lower than the more successful northern side of the High Street as are the retail rental values. The proportion of estate agency use within the Market Square area is not sustainable and is affecting retail rental values in the locality. A recent report by Local Data Company on retail and leisure trends, identifies that estate agency closures are escalating and top the list of service retail closures in the first half of 2017.

An analysis of data that has been collated a distinct correlation between footfall and retail rents can be identified. The lowest footfall and retail activity being concentrated at the south-western corner of the Market Sq. This is reflected by low retail occupancy and rental values in the corresponding areas. The town is suffering from decreased footfall into the Market Sq.

THEME r3 - PEDESTRIAN CONNECTION

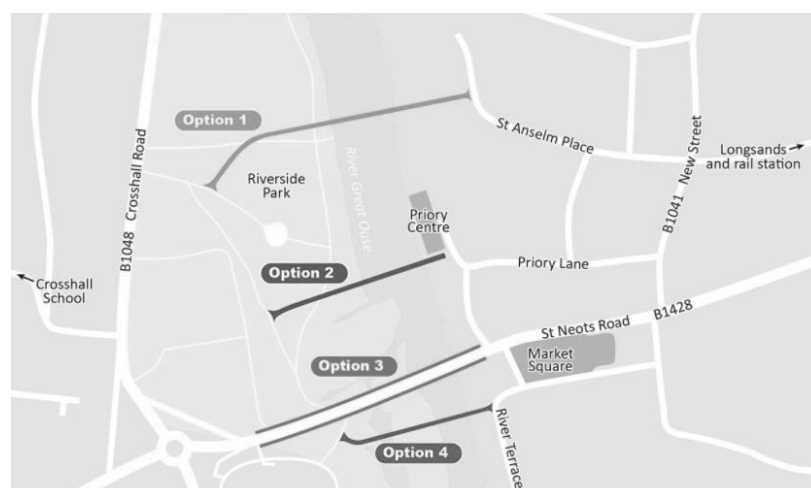
The footfall in the town centre has seen a steady decline, which has been at a steeper rate than other towns in Huntingdonshire (St Ives and Huntingdon). The town centre offers opportunity for better use of the Market Sq. and potential for redevelopment along portions of its frontage with the river to the north of the road bridge (the Priory Centre and



surroundings). The river asset itself is underutilised. The boardwalk on the north-western side of the river should be extended to the south to connect the Market Sq. to the Priory Centre. There is a need for better pedestrian and bicycle linkages together with footbridge crossings into the town centre area.

The perception of both councillors and business groups, is that the parking charges as levied on the town centre car parking is a primary causation of the decline in footfall. However, parking use at the Town Centre car parking locations saw a decline of less than 1%. Whereas footfall is declining steadily, and at a faster rate, notwithstanding the increase in the towns' population.

From this a correlation can be made between the use of car parks and the decline in footfall, in that people are visiting the town but are not making multiple stops during their visit. The



diversity of shopping experience is declining with areas of the primary shopping frontage dedicated in large proportion to estate agents, banks and charity shops. The low volume of parking users at the Riverside has remained constant, which indicates a lack of connectivity to the town centre. Of significance and associated to town centre attractiveness and therefore its ability to maintain footfall is the fact that the diversity of shopping offers in the town centre has also declined. It is important to note that neighbouring town centres of Huntingdon and St Ives have maintained a reasonably consistent level of footfall

THEME r4 – HIGH SPEED BROADBAND

One measure of a towns' readiness and accessibility to businesses and home workers is the availability of high-speed (300Mbps) and super-speed (1Gbs) broadband. One factor that enables this potential is the extent of cable/fibre that can accommodate these speeds. Unfortunately, there are areas of the town that have a rating of only 76Mbps. These areas include the newest housing development at Loves Farm. It is important, to attract the type of business (KIBS and Creative sectors) that, at minimum, a high-speed internet connection infrastructure is provided at time of development. A programme of retrofitting super-speed (1Gbs) fibre to existing low rated residential, commercial and industrial areas should be initiated as a long-term aim of the masterplan for growth.

PROGRAMMES

- SHORT – Start gradual transformation of the Market Square. into a main pedestrian and cyclist destination, providing safe circulation routes and adequate bike parking, and promoting a future full removal of car parking.
- SHORT – Support option to link Market sq. and Riverside car park with pedestrian footbridge to generate a new powerful visual and physical link between two of St Neots most distinctive attractions.
- SHORT – Investigate the reopening of The Priory connection to Priory Lane as a roadway access onto High Street with the aim of reducing direct through traffic on the High Street.
- MEDIUM – Enhance bus stop area in association with public transportation bus routes.
- MEDIUM– Request proposals from providers to install a free wi-fi network with the town centre.
- MEDIUM – As part of the regeneration programme, formalise a plan of action to support the reuse of derelict buildings in town, attracting commercial activities that can help re-vitalise the market square.

- MEDIUM – Fund and build the centre footbridge link to the town centre from the Riverside car park (option 4 or Option 3) part funded by Cambridge County Council.
 - MEDIUM – Fund and build the norther foot/bicycle bridge and connect to the town centre from the north.
 - MEDIUM – Extend to the south, the boardwalk located on the north-western side of the river and link it to the new pedestrian footbridge, creating an attractive pedestrian circuit independent from cars, and connecting the Market Square., Priory Centre, riverside park, and other attractions.
 - MEDIUM – Promote town centre as a location for creative industries and KIBS through the provision of floor space and training facilities.
 - MEDIUM - One Public Estate approach to the use of public assets to provide space for growth, support small business and augment the civic infrastructure.
 - LONG – Implementation of a complete and co-ordinated regeneration programme that recognises local character.
- LONG – Initiate a programme of connecting priority areas to super-speed internet broadband with an intent to identify a phased rollout of a town-wide 1Gbs network.

GOVERNANCE

The Masterplan for Growth for St Neots will be subject to the oversight of an implementation team consisting of representatives from the Combined Authority, Cambridgeshire County Council, Huntingdon District Council and St Neots Town Council and others.

The team will direct, monitor and receive regular reports on activities and programme.

SCHEDULES OF RECOMMENDED ACTIVITIES AND PROGRAMMES

SHORT TERM			
PROJECT/PROGRAMME		THEME	INDICATIVE COST
01S	Create register of unused floor-space within existing industrial units that is available for occupation by training, KIBS and creative sectors.	INDUSTRY	NA
02S	Locate flexible creative work space in the town centre to accommodate creative use and establish demand, integrate local networking group (The Neotists) as project co-ordinators, include Library in partnership.	INDUSTRY	NA
03S	Prepare policy commentary to St Neots Neighborhood Plan that supports the protection and intensification of existing industrial land.	INDUSTRY	NA
04S	Confirm training partners (with providers, St Neots Manufacturing Club) and co-ordinate with LEP	INDUSTRY	NA
05S	Identify routes, timings and costs for subsidised local bus service that uses the Market Place as a central connecting hub.	TRANSPORT	NA
06S	Ensure alignment of existing development applications with the masterplan for growth and the future CaMKOx corridor.	TRANSPORT	NA
07S	Contribute to the District Councils parking strategy that supports visitor engagement with Town Centre and thereby increases opportunity to generate footfall, potentially by subsidisation of free short-term parking in certain car parks if supported by the Town Council.	TRANSPORT	NA
08S	Enhanced events programme to animate important public spaces including the Market square and riverside area.	TRANSPORT	NA
09S	Define public health monitoring measures that are economically driven and which co-ordinate with the masterplan for growth.	HOUSING	NA
10S	Confirm primary care delivery plan with CCG NHS	HOUSING	NA
11S	Facilitate and maintain a satellite office connection point to direct relevant support requests to the District Council.	HOUSING	NA
12S	Start gradual transformation of the Market Square. into a main pedestrian and cyclist destination, providing safe circulation routes and adequate bike parking, and promoting a future full removal of car parking.	REGENERATION	NA
13S	Support option to link Market sq. and Riverside car park with pedestrian footbridge to generate a new powerful visual and physical link between two of St Neots most distinctive attractions.	REGENERATION	NA
14S	Investigate the reopening of The Priory connection to Priory Lane as a roadway access onto High Street with the aim of reducing direct through traffic on the High Street.	REGENERATION	NA
15S	Bicycle Parking facilities in Market Square	REGENERATION	£10,000
		SUB TOTAL	£10,000

MEDIUM TERM			
PROJECT/PROGRAMME		THEME	INDICATIVE COST
01M	Identify and locate a local industry targeted training programme within industrial park, possibly utilising unused industrial floor-space for on-site training programme. Fund through subsidy or through grants.	INDUSTRY	£50,000
02M	Report on the role of the St Neots manufacturing sector within the Industrial Strategy for Cambridgeshire and Peterborough, to be produced by the independent Economic Commission.	INDUSTRY	NA
03M	Review and amend St Neots Neighbourhood Plan to align with the recommendations of the Masterplan for Growth.	INDUSTRY	£5,000
04M	Support the St Neots Manufacturing Club in their efforts to bring together a regional training programme.	INDUSTRY	NA
05M	Create a local KIBS and Industrial partnership initiative to help these local sectors associate and grow together. Refine a strategy to attract specific creative and KIBS industries to work with the existing manufacturing base. Further strengthening a micro agglomeration which will feed into the wider Cambs economy.	INDUSTRY	NA
06M	Assist in the identification and preparation of grant applications to future fund accommodation and resources.	INDUSTRY	NA
07M	Implement local bus service and monitor usage.	TRANSPORT	£250,000
08M	Co-ordinate, prioritise and design all infrastructure projects with future connection to the CaMKOx corridor in mind through a connective transportation programme.	TRANSPORT	
09M	Open up The Priory and High Street intersection to one way traffic	TRANSPORT	£15,000
10M	Implement targeted on-street parking enforcement and restriction.	TRANSPORT	NA
11M	Monitor parking usage and footfall.	TRANSPORT	NA
12M	Ensure that development proposals and planning approvals are measured against public health monitoring measures deal adequately with the increased pressures placed on infrastructure and social/health services.	HOUSING	NA
13M	Co-ordinate delivery of centralised facilities through development and planning application process. Identify properties that are likely to be vacated as part of re-structuring of service.	HOUSING	NA
14M	Investigate a One Public Estate approach to the use of public assets.	HOUSING	NA
15M	Enhance bus stop area in association with public transportation bus routes.	REGENERATION	NA
16M	Request proposals from providers to install a free wi-fi network with the town centre.	REGENERATION	NA
17M	As part of the regeneration programme, formalise a plan of action to support the reuse of derelict buildings in town, attracting commercial activities that can help re-vitalise the market square.	REGENERATION	£600,000
18M	Fund and build the centre footbridge link to the town centre from the Riverside car park (option 4 or Option 3) part funded by Cambridge County Council.	REGENERATION	£2,500,000
19M	Support the northern foot/bicycle bridge and connect to the town centre from the north.	REGENERATION	NA
20M	Extend to the south, the boardwalk located on the north-western side of the river and link it to the new pedestrian footbridge, creating an attractive pedestrian circuit independent from cars, and connecting the Market Square., Priory Centre, riverside park, and other attractions.	REGENERATION	£350,000
21M	Promote town centre as a location for creative industries and KIBS through the provision of floor space and training facilities.	REGENERATION	£20,000
22M	One Public Estate approach to the use of public assets to provide space for growth, support small business and augment the civic infrastructure.	REGENERATION	NA
		SUB TOTAL	£3,790,000

LONG TERM			
PROJECT/PROGRAMME		THEME	INDICATIVE COST
01L	Expansion of training programmes and construction of a bespoke training facility to support supplementary manufacturing activity, including KIBS and creative industry sectors, which will emerge because of the implementation of the masterplan for growth and CaMKOx corridor.	INDUSTRY	NA
02L	Monitor KIBS sector employment and GVA creation and retention, including travel to work outside of town and region.	INDUSTRY	NA
03L	Support CaMKOx corridor and promote inter-sector communication through CA and LEP outreach.	INDUSTRY	NA
04L	As part of a regeneration programme examine the construction of a multi-storey Car Park within town centre location close to Priory Centre or at the Riverside location connected by the proposed footbridge link over the river.	TRANSPORT	NA
05L	Integrate local transportation with CaMKOx corridor.	TRANSPORT	NA
06L	Ensure new developments and planning applications prioritise the support of the local public transportation network through appropriate tools. Allocate CIL to support public transportation infrastructure.	TRANSPORT	NA
07L	Integrate primary care delivery plan and the re-use of vacated primary care facilities into a regeneration programme.	HOUSING	NA
08L	Ensure CIL revenue income from housing development is targeted to a connective infrastructure programme.	HOUSING	NA
09L	Implementation of a complete and co-ordinated regeneration programme that recognises local character.	REGENERATION	NA
10L	Initiate a programme of connecting priority areas to super-speed internet broadband with an intent to identify a phased rollout of a town-wide 1Gbs network.	REGENERATION	£2,000,000
		SUB TOTAL	£2,000,000
		PHASE 1 TOTAL	£5,800,000

APPENDIX A: APPROACH

PLACE DNA AND ENGAGEMENT

We undertook a parallel two-part process of data analysis and engagement to develop the masterplan. The engagement set out to understand the situation of the town from the people and organisations who matter, those who will be essential components in the delivery of the Masterplan for Growth Programmes. Meetings were held with local business groups and individual business owners, outreach to members of the towns' manufacturing club and the town centre initiative. A team of Huntingdonshire District Council officers supported the collection of data and added professional context to the discussion. The Town of St Neots supported through contributions from the Mayor, Town Clerk and Town Development Manager. Other contributors included the NHS/CCG, officers in various Cambridgeshire County Council departments, Public Health England, Greater Cambridge and Greater Peterborough Local Economic Partnership and local activist groups such as the

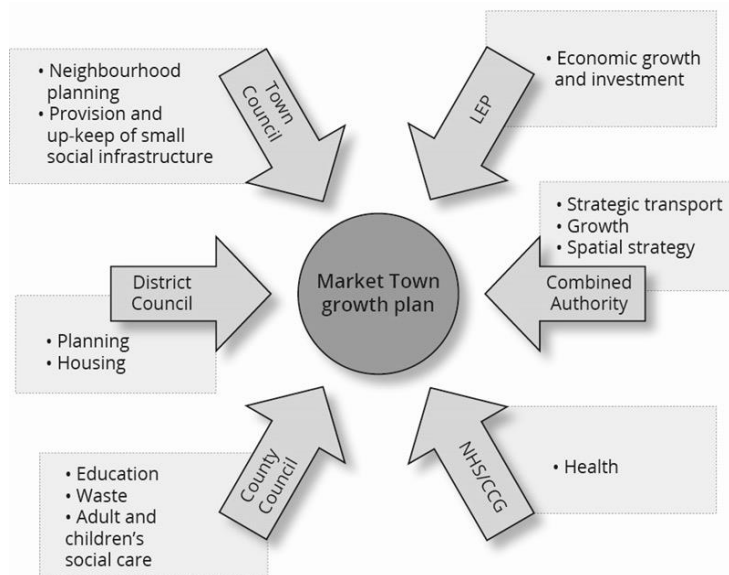


Figure 1: Market Town Growth Plan (DRAFT)

Neotists (a group of local creatives in web design, publishing, art and graphic design).

The engagement interaction revealed a thread of connected thought and previous work effort that pointed at what needed to be done in the town to take advantage of the opportunities that exist. The following points were raised, often without realisation that similar messages were being relayed by other contributors:

- The Market Sq. requires intervention in terms of the vacant property (Old Falcon), the limited shopping diversity, the market offer and traffic congestion.
- The town centre is experiencing a decline in footfall with a perception that it is linked to the car parking fee structure.
- The river and water-front is an underused resource.
- There is not enough space for 'creative industry' to locate closer to the town centre.
- Poor public Transportation connections.

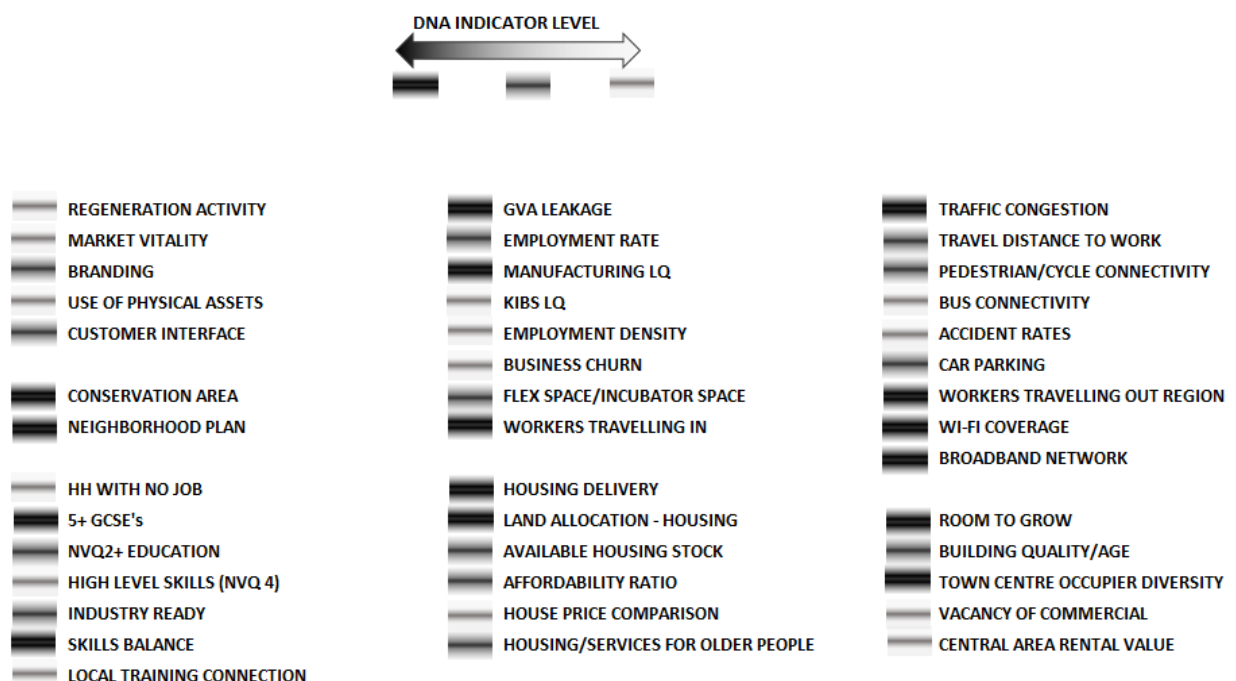
- f. Industrial land and property should be protected from market demand for housing development.
- g. Recent housing development was not adequately connected to the town.
- h. Insufficient local training facilities and resources.

In parallel with the engagement process, data was being collected and analysed to feed into the Place DNA Tool. The DNA analyses performance across 7 key areas; Regeneration, Planning, Infrastructure, Transport, Housing, Community and Industry.

Identifying the appropriate intervention or support action is at the heart of any successful economic and community regeneration programme. The Place DNA tool allows a discovery of the underlying characteristics of the town. We do this by testing over 40 different markers that are related to economic performance. At the same time, we measure how each marker measures against the wider area (district/county/region) to get an indication of the towns' position in the local and regional economy. Substantial differences are identified, to discover the strength of data backed high comparison and low comparison markers, these are represented in a Place DNA panel which helps to highlight the areas of difference. However, this Place DNA genome is only part of the story.

The skill of application of the findings from the Place DNA analysis is the incorporation of subjective information. This subjective information forms external influences on the activation of certain parts of the towns' genome.

To identify the external influences and their importance we combine the Place DNA data backed analysis with the feedback that we secured from local stakeholders, politicians,



community activists and business groups. The results allow the identification and confirmation of issues and influences that are underlying the economy of the town. The analysis may also produce insights as to where issues that are based on subjective observations are not the cause of a symptom but the consequence of an alternative malady.

Appropriate interventions are then formed from the combined analysis. The remedies (programme and policy interventions) form the basis for a holistic masterplan for growth that supports and invigorates the towns unique economic Place DNA genetic make-up.

GROSS VALUE ADDED LOCAL v REGIONAL

We have taken care when putting together a model that is representative of Gross Value Added (GVA) generation at local level, but which also reflects the conditions that will impact the regional GVA modelling and forecasts being prepared by others.

The regional GVA model being developed by Cambridge University is based on regionalised input-output data, and predicts the location of production by industry. The predictions are based on production functions that represent the demand for labour, floorspace, travel, and other GVA (capital, taxes and subsidies). The production functions enable the quantification of labour and other GVA, as well as total values of turnover in each model zone

The local GVA model uses two methodologies that are based on employment rather than production. The model allows a comparison and check on the accuracy of the output. The basis for both methodologies is local GVA generated through jobs (not production). This allows a mechanism for comparisons for small census output areas. Sectors used are: Agriculture, Mining/Utilities, Manufacturing, Construction, Retail, Wholesale and Motor Trades, Transport & Storage, Accommodation and Food Services, Information & Communication, Financial & Insurance, Property, Professional, Scientific & Technical, Business Administration & Support Services, Public Administration & Defence, Education, Health and Arts Entertainment Recreation & Other Services.

GVA Methodology 1: A local average earnings is calculated for each of the major industry sectors by applying a factor based on the differential of District to National earnings. A multiplier is then applied based on industry sector using ONS weighting. In this case we have applied the lower range of factors to reflect the lower than national earnings level. The

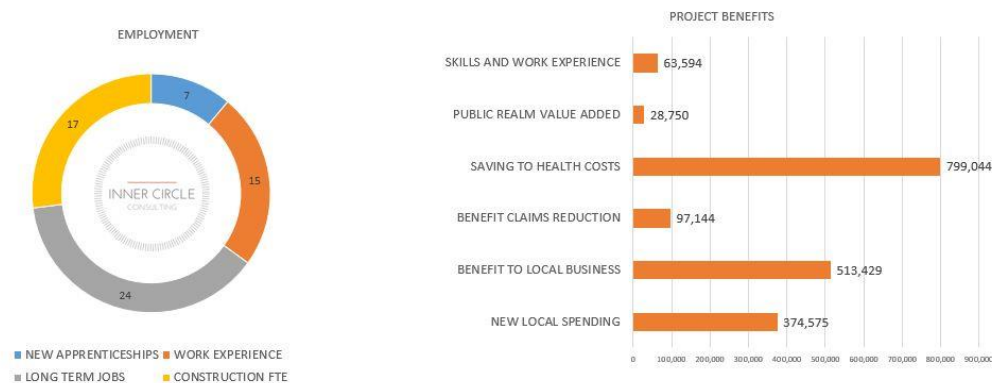
output GVA is then based on the number of jobs in each sector that are located within the study area, the local earnings and the ONS based multiplier.

GVA Methodology 2: The GVA produced per job, relative to the appropriate industry sector, is taken from the regional GVA outputs per job, which is produced by the GLA. This is used as a multiplier to the number of local area jobs to produce a GVA per industry sector.

The GVA that is captured locally is then calculated by using the factor of local area live/work (residents who live and work in the study area) and the output of both methodologies. This then provides an industry sector breakdown and a range of locally captured GVA.

COMMUNITY IMPACT MODEL (CiM)

This model is calibrated to the local economy and demographics. The CiM is used to forecast the impact of a project or of a whole programme. The outputs include how long the benefits of the project will persist in the area, how many jobs are created during construction and occupancy (taking account of displacement and additionality), the reduction and savings in job seekers allowance claims, benefits to health, additional local spending by new residents and new businesses and the benefit to existing businesses.



Different scenarios can be run with little effort, this means that a whole range of different redevelopment options can be considered and the outputs weighed against the financial viability of the proposals. More detailed information is available in the supplementary documents.

DRAFT