CAMBRIDGESHIRE & PETERBOROUGH COMBINED AUTHORITY

PAUL BRISTOW
MAYOR OF CAMBRIDGESHIRE & PETERBOROUGH

Cambridgeshire & Peterborough Combined Authority
Pathfinder House
St Marys Street, Huntingdon
PE29 3TN

24 October 2025

[redacted]

Dear [redacted]

Re: Freedom of Information request ref CA464

Thank you for your request for information received on 26th September 2025. The response is given below:

Question 1: Please provide copies of any strategies, policy papers or internal reports referencing the UK Government's Industrial Strategy Sector Plans (IS-8) since 1 January 2024.

Date	Meeting type/Internal document	Report	Link
Feb 2025	Submission to Government	Emerging Priorities for National Industrial Strategy	Attached
4 June 2025	Combined Authority Board	Cambridgeshire and Peterborough Local Growth Plan Update	democracy.cambridgeshirepeterborough-ca.gov.uk/documents/s4516/Cambridgeshire and Peterborough Local Growth Plan Update.pdf
24 June 2025	Internal document	Industrial Strategy Overview	Attached
16 July 2025	Internal document	Life Science Sector Plan Summary note	Attached
22 July 2025	Combined Authority Board	Chief Executive's Highlight Report	democracy.cambridgeshirepeterborough-ca.gov.uk/documents/s4927/Chief Executives Highlight Report July 2025.pdf

22 July 2025	Combined Authority Board	Cambridgeshire and Peterborough Local Growth Plan Update	democracy.cambridgeshirepeterborough-ca.gov.uk/documents/s4926/Local Growth Plan Update.pdf
22 October 2025	Combined Authority Board	Cambridgeshire and Peterborough Local Growth Plan Update	Agenda for Combined Authority Board on Wednesday, 22nd October, 2025, 9.30 am

Question 2: Please provide details of any funding allocations, spending plans or approved bids (internal or external) relating to IS-8.

We do not hold this information.

Question 3: Please provide minutes, agendas or briefing notes from any local forums, committees or partnership boards where IS-8 was discussed.

We do not hold this information.

Question 4: Please provide any correspondence with UKRI, Innovate UK, UK Space Agency, or Catapult centres regarding IS-8 initiatives.

We do not hold this information.

Question 5: Please confirm the official job title(s) (not personal names) of the officer(s) designated as lead for IS-8 activity.

Head of Policy, Insight and Performance

Assistant Director, Business Trade and Investment

Question 6: Please confirm whether any teams, business units, working groups, advisory panels or boards have been established, or are formally proposed, to deliver or oversee IS-8 activity since 1 January 2024. If yes, please provide:

Combined Authority Board – this is the main Board of the Combined Authority. It was not set up to discuss IS-8 activity but the Local Growth Plan is presented to the CA Board (see the response to Q1).

Question 7: The title and remit of each group

See Answer to Q6.

Question 8: Any available terms of reference, governance documents, or role descriptions

Link to CA Board Browse meetings - Combined Authority Board

Question 9: The job title(s) (not personal names) of the officer(s) responsible for servicing or leading each group.

Link to CA Board Browse meetings - Combined Authority Board

I hope this information is helpful but if you are unhappy with the service you have received in relation to your request and wish to make a complaint or request a review, you should write to us via our contact us email address: democratic.services@cambridgeshirepeterborough-ca.gov.uk or write a letter to Complaints, Cambridgeshire and Peterborough Combined Authority, 2nd Floor, Pathfinder House, St Mary's Street, Huntingdon, Cambs PE29 3TN within 40 days of the date of this e-mail.

If you are not content with the outcome of the internal review, you have the right to apply directly to the Information Commissioner for a decision. The Information Commissioner can be contacted at: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF, or via their website: https://ico.org.uk/

Generally, the ICO will not undertake a review or make a decision on a request until the internal review process has been completed.

Yours sincerely

[redacted]

Susan Hall
Data Protection Officer

CAMBRIDGESHIRE & PETERBOROUGH COMBINED AUTHORITY

Cambridgeshire & Peterborough: Emerging Key Growth Priorities for the National Industrial Strategy

February 2025

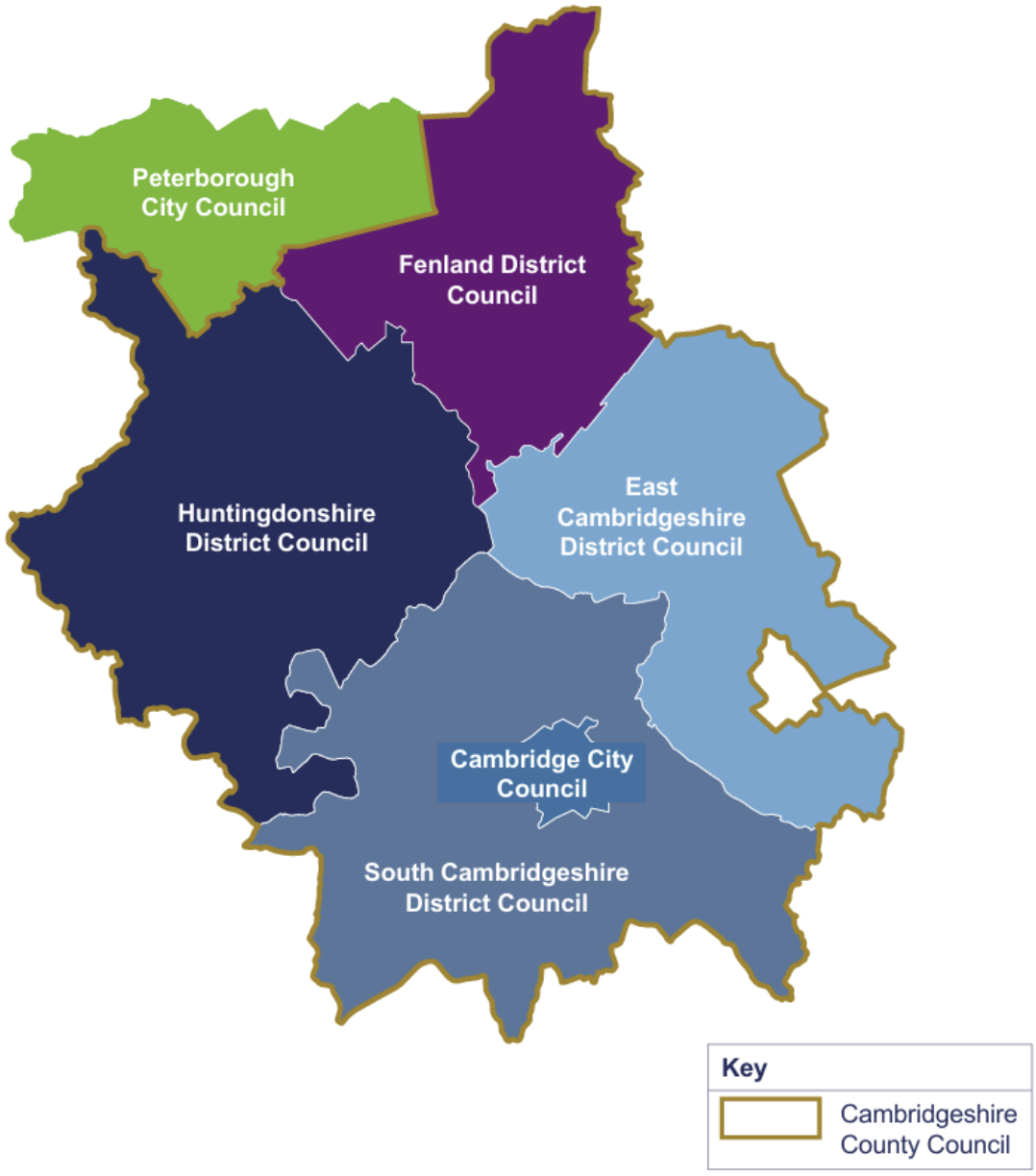
Contents

Emerging Key Growth Priorities and Challenges for the National Industrial Strategy

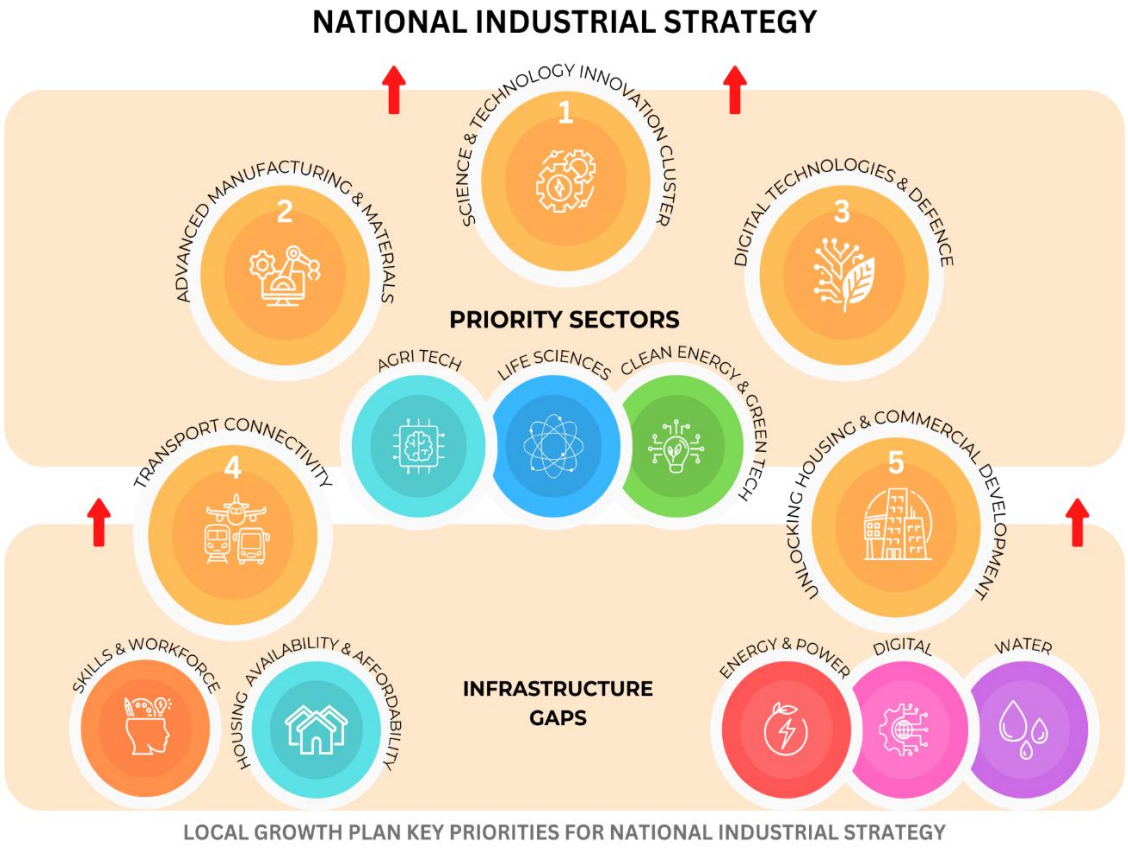
Who we are

Cambridgeshire and Peterborough is a remarkable area that has a history unlike any across the UK. A science and technology superpower with roots dating back to the 13th century, our region has stood as a renowned leader of industry, knowledge and economic power for hundreds of years.

Today, as the only area outside of the South East and London that is a net contributor to the Exchequer, it is clear our strengths are still at the forefront of the UK.

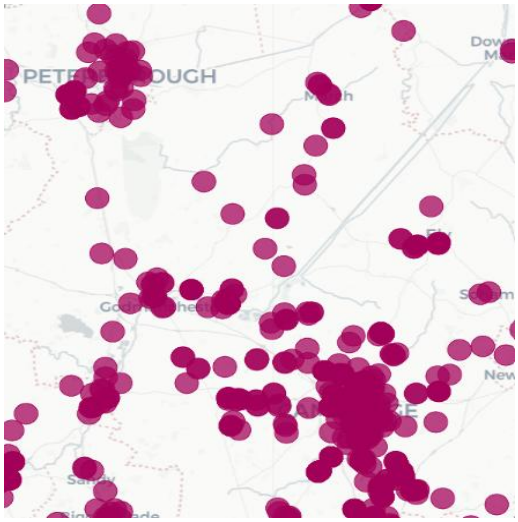


Below is a key diagram presenting our five numbered priorities. The central theme underpinning our sector strengths is our overall contribution to innovation and our globally significant science and technology innovation cluster. Two of our priorities reflect binding constraints and unlocking these challenges has a direct causal relationship with the intensification, expansion and diffusion of our cluster (and the potential sector growth that sits within it) and our two other priority sectors that are nationally significant and through specific additional intervention can make a major contribution to the National Industrial Strategy.

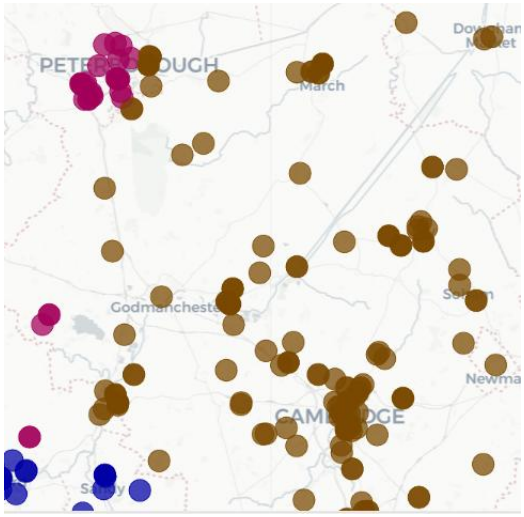


A mapping of our key sectors and clusters

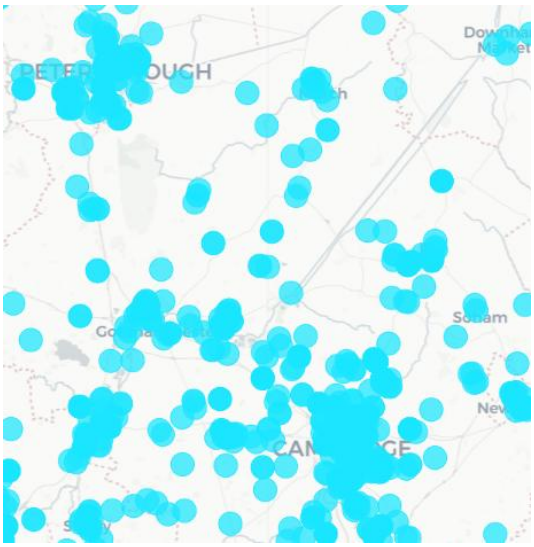
Set out below is an up-to-date mapping of our key sectors and clusters. The patterns are similar across the sectors with a strong focus on Cambridge as well as a significant clustering around Peterborough. The maps show the spillovers into the surrounding areas and the growing importance of a strategic and sub-regional approach to their intensification, expansion and diffusion. Agri-tech follows a similar pattern, and is we believe nationally significant, too. This can be provided, if requested.



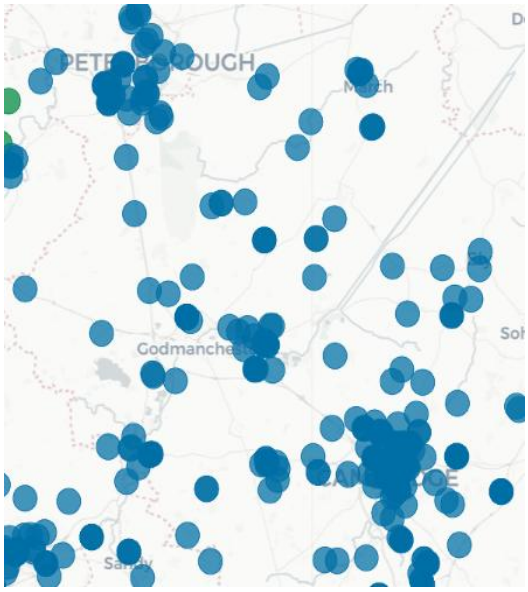
Life Sciences



Advanced Manufacturing



Digital Technologies



Energy & Cleantech

Source: datacity.com

Growth Priority 1 – A Science & Technology Innovation Cluster

Expand and intensify our globally significant science and technology cluster, centred around Cambridge but drawing on and developing assets and linkages with the wider region, strengthening the UK's position as a science and technology superpower.

Summary

We will:

- Leverage our unique innovation ecosystem to create, expand and attract businesses, including FDI, that commercialise world-leading research within our multi-sectoral science and technology cluster. This especially incorporates life sciences (including Biopharma and MedTech), digital technologies (including AI), clean energy, green tech and agri-tech. By seamlessly integrating new and emergent technologies with supply chain fusion where all components of the supply chain are connected and optimised, we will ensure efficient and innovative growth across these sectors.
- Build on and mobilise our renowned research institutions and universities seeking to nurture the cluster with home-grown and attracted high-end talent and investment.
- Stimulate and accelerate the continued seeding and growth of high-value businesses over the decade, to secure continued co-location, clustering, and agglomeration of these highly networked sectors, technologies and supply chains, and unlocking in a timely way, the barriers for their intensification and expansion.
- Position our region as the premier test bed and manufacturing base for groundbreaking healthcare innovations, leveraging the rebuild and reconfiguration of our acute NHS care provision to lead the way in early adoption and transformative change. This initiative will not only enhance patient outcomes, reduce costs, and improve efficiency, but will also attract top talent and investment, fostering a cutting-edge healthcare ecosystem that sets new standards and drives regional economic growth.

Scope and rationale

The scale and scope of our science and technology innovation cluster is globally significant and fundamental to the future competitiveness and growth of the UK economy:

- Our ecosystem, anchored by the University of Cambridge, drives groundbreaking research and knowledge exchange. It supports over 86,000 jobs across the UK and contributes nearly £30 billion to the UK economy per annum. 24 businesses born here have reached the $1bn 'unicorn' status'.
- In the 2024 Global Innovation Index, Cambridge is ranked top as the world's leading science and technology sector by intensity - alongside Silicon Valley, USA.
- With 17 Nobel Prize winners in life sciences since 2000, it is a global leader in this field, with over 51,000 jobs. The unique partnership between science and research, industry and the health community, is a global differentiator in a market forecast to be worth £3 trillion.

- Hosting unprecedented levels of growth in knowledge-intensive sectors, we are a national outlier in terms of job creation and wealth generation in sectors of the future, with a growth rate of 11% specifically in life sciences.
- There is latent capacity to grow, at pace, if constraints on the ecosystem are removed. Cambridge's knowledge economy has consistently demonstrated resilience and buoyancy amid the challenging macro-economic climate in the UK over the past decade or more. In the last 12 years, employment in knowledge-intensive sectors in Greater Cambridge grew by an average of 4.5% per year, significantly outpacing the national average of 1.8% per year for the same sectors.
- Continued levels of innovation output require focus on the organisation, intensification and expansion of the cluster to maintain and strengthen its global competitiveness. Priorities 4 & 5 are critical to this.
- There is opportunity to build on the foundations laid by the Case for Cambridge that is founded on our own Independent Economic Review, but scope to stretch the ambitions and put the solutions on a more sustainable footing.

Evidence

The scale and scope of our assets and the capabilities of our delivery partners are extensive. Our area stands out in the UK, having attracted Britain's largest company, AstraZeneca, to relocate their global HQ here – a clear testament to our region's appeal. Supplementing this appeal to investors, we are also home to ARM, meaning that two of the UK's five biggest companies are based in our region as well as other significant organisations such as DarkTrace, Raspberry Pi and AVEVA.

We continue to strengthen our position as a hub for cutting-edge innovation and sustainable development channelled through our key sectors of Life Sciences; Clean Energy & Green Tech; and Digital and Technologies

Life Sciences

There are over 1,100 Life Sciences companies in our world-class region that deliver over £21.8 billion in revenue employing over 51,000 employees in specialist clusters as diverse as:

Biopharma Small | Precision Medicine | Genomics | Proteomics | Cell & Gene Therapy | Medtech AI | Health Wearables | Drug Discovery AI | Vaccine Development | Synthetic Biology | Data Analytics

- With a legacy of solving world problems, from the discovery of the double helix structure of DNA to the development of AstraZeneca's first Covid-19 vaccine, we are home to:
    - 14 centres of research excellence in Life Sciences & MedTech.
    - 10 science parks, 13 innovation/incubator centres and 14 research institutes supporting inception and growth, including several leading healthcare institutions at the forefront of cutting-edge trials for innovative therapies and diagnostics.
- The Wellcome Genome Campus that hosts the world's foremost institutes and organisations in genomics and computational biology including EMBL's European Bioinformatics Institute.
- Equally, we are engaged in the associated reconfiguration of our acute care provision, bringing advanced treatments to our communities, including on our world class Biomedical Campus, with a planned new state-of-the art Children's Cancer Hospital with a unique vision

of integrated mental and physical healthcare, as well as the reinvention of Hinchingbrooke Hospital, putting digital at its core.

- Notable companies based here include AstraZeneca, Abcam, LabCorp, Illumina, Bicycle Therapeutics, STEMCELL Technologies, CMR Surgical, Clovis Oncology, Bit Bio, and GW Pharma.

Clean Energy & Green Tech

There are over 700 Clean Energy & Green Tech companies in our region that delivers over £15 billion in revenue employing over 15,000 employees in specialist clusters as diverse as:

Battery Technologies | Fusion Power | Energy Systems & AI | Carbon Capture (CCUS) | Waste-To-Energy | Recycling | Smart Energy Systems | Environmental Management | Clean Technology

- The Cambridge Nuclear Energy Centre (CNEC) aims to develop a detailed understanding of the route to increased deployment of nuclear technology as a tool in the decarbonisation of our energy system.
- Cambridge Cleantech is a unique networking organisation formed to bring together innovators, investors, corporates and academics to develop sustainable technologies to deliver net zero ambitions.
- Cambridge Power specialises in the planning and development of grid-scale energy storage and renewable generation assets across the UK.
- Talga, based in Cambridge, develop green battery anodes and advanced materials to help shift the world towards a sustainable future. They utilise one of the highest-grade graphite resources in the world at their mine and coated anode production facilities in North Sweden, ensuring our part of the battery supply chain is clean, ethical and secure.
- Nyobolt, based in Cambridge, develop ultra-fast EV charging stations to minimise the time taken for motorists to recharge their vehicles.
- Rezolv Energy, based in Cambridge, are engaged in the build of onshore wind farms in the UK and Europe and have developed over 2GW of renewable power

Agri-Tech

There are over 200 Agri-Tech companies in our region that delivers over £1 billion in revenue employing nearly 3,000 employees in specialist clusters as diverse as:

Precision Agriculture | Robotics | Sensor Tech | Artificial Intelligence | Data Analytics | Vertical Farming | Next Generation Foods | Food Technologies | Geospatial & GIS Technologies

- In Cambridgeshire, the Fens account for 50% of the most productive Grade 1 fertile agricultural land in England. Around 40% of all English vegetables are grown here. The Fens are also an important area for growing ornamental bulbs and flowers and provide the perfect testbed for new growing technologies.
- Fen celery has been granted protected status worldwide due to its distinctive nutty and bittersweet taste.
- The region is an ideal test bed for advancements in agricultural technology and food. Since 1919, the National Institute for Agricultural Botany (NIAB) in Cambridge has been at the forefront of crop research, enhancing crop yield and improving disease resistance through gene editing.

Their efforts help farmers grow more sustainably. Additionally, their business incubator has fostered numerous companies, including PES Technologies, which developed rapid soil health testing via non-contact smell evaluation.

- Headquartered in Cambridge, Agri-TechE is a not-for-profit, independent membership organisation dedicated to advancing agricultural innovation and sustainability, they bring together forward-thinking farmers, researchers, technologists, and agri-businesses to foster collaboration and drive impactful solutions throughout the UK.
    - Key companies here include Syngenta, Bayer Crop Science, M&M Flowers, AM Fresh and OMEX.

Key Barriers

As set out in our Independent Economic Review and further extended by HMG in its work on the Case for Cambridge, there is compelling evidence to demonstrate that our binding constraints are increasingly severe infrastructure gaps across water, energy, transport, digital and housing linked to skills that are holding back productivity and economic growth.

The water constraints are already severe and are a major barrier with the Environment Agency continuing to object to all new developments. Smart metering and its retrofit and other measures to address water usage, can only go so far but can help in the short term. The lead times for more holistic solutions also mean medium term interventions such as new pipelines are required whilst we progress the building of new reservoirs. Access to the grid to source new development is also a major barrier as there is no excess capacity, and so alternative energy solutions, are also important. Equally, transport connectivity to support the expansion of the cluster is a real threat to future competitiveness and is currently poor in comparison with the other key globally competitive city-regions that are open to the same markets and investment. There is a real need for rapid mass transit and a stable, effective bus network to better secure the necessary inter-connectivity to help stimulate stronger agglomeration and more knowledge spillovers as well as extend opportunities for diffusion as well as to enable necessary supply chain support that works. A first class modern and decarbonised logistics industry is also a key dependency to sustain national and international competitiveness. Equally there is a need to address affordability issues, particularly in terms of attracting and retaining essential workers, but also in terms of provision of incubator space for new start-ups and scale-ups, as well as enabling a high quality and attractive environment more generally, to retain and attract world class talent. Maintaining both high end knowledge-intensive talent and bridging key critical skills gaps in the supply chain including public sector workers remains a huge challenge. A high-quality environment offering a high quality of life is critical.

Please see Priority 4 and Priority 5.

Links and interactions

Our innovation cluster impacts both globally and UK wide and so relationships with other MCA areas are multiple.

However, a key issue for the cluster is its intensification, expansion and diffusion within its immediate proximity and development. The immediate orbit around Cambridge University provides

an enormous opportunity. A key priority for early intervention is for Government to support the development of a 'transformational multi-sector innovation hub' in Cambridge that parallels developments in Boston (Lab Central) and Paris (Station F). This will further unlock and accelerate growth, doubling the rate of unicorns produced, the amount of venture investment, and the number of new companies formed, and further attract global interest. By adopting a 'hub and spoke' model there is also an opportunity for the further development of satellite sites through improved connectivity across Cambridgeshire & Peterborough.

In addition, there is a real investment challenge in retaining high growth businesses once they have scaled to unicorn status that needs to be addressed to prevent leakage and retain the benefits of wider expansion and growth. Again, working with Government we could 'fix this' to retain the investment as companies expand into £10bn entities, securing all the consequent benefits that flow by retaining them in the UK.

More widely, there are significant opportunities to exploit stronger links with Oxford and the wider Oxford and Cambridge Partnership, its work with the Super Cluster Board, the opportunities from East-West Rail and the Universal Studios development. Equally, strong links exist with Greater London, such as our engagement with the UK Innovation Corridor. If you factor in the corridors and the wider East region, our Combined Authority area and this cluster sits at the core or a circa £350bn economy.

We are also collaborating with other MCA areas in terms of our impact, including actively working with Greater Manchester. Additionally, Cambridge University for example, has demonstrative evidence of its global and UK wide impact across all English regions and other Nations, that is hugely significant within each of them.

The intensification, expansion and diffusion of this important innovation cluster, of course, depends significantly on meeting our infrastructure gaps, that act as hugely damaging and binding constraints.

Growth Priority 2 – An Advanced Manufacturing & Materials Powerhouse

Deliver a leading-edge Advanced Manufacturing and Materials Powerhouse

Summary

We will:

- Stimulate the expansion of the Advanced Manufacturing and Materials sector, with a particular focus on Robotics, Autonomy, AI, Digital, Greentech and the Space sector, to strengthen supply chains and drive regional and national growth.
- Adopt a system-wide approach to leverage the green engineering and manufacturing firms with vital supply chain links to broader automotive and engineering sectors, where we can create and exploit synergies and linkages with neighbouring markets, businesses and regions.
- Support this cluster through innovation, infrastructure development, talent and skills, to ensure its continued expansion and success.

Scope and Rationale

Our area hosts a burgeoning cluster of green engineering and manufacturing firms with vital supply chain links to broader automotive and engineering sectors. Over the next decade, the aim is to transform our area into one of Europe's best connected and fastest growing green and advanced manufacturing industrial clusters, enhancing our international profile and nationally significant assets.

We already have significant critical mass:

- Strong growth and 20,000 jobs in advanced manufacturing, and institutions and companies, with globally significant research and engineering.
- Manufacturing and engineering sectors that add £8.5 billion per year to the area's GVA.
- Strong growth in healthcare, environmental engineering and supply chain links to Midlands Advanced Manufacturing sectors.
- Growing demand for industrial locations in Peterborough, Huntingdonshire, East Cambridgeshire and Fenland.

We are aiming to prioritise the sector drawing on our existing smart manufacturing networks and working in combination with advancements in Clean Energy and Green Tech and by continuing the expansion of our brand-new university in Peterborough, we are seeking to create potential to lead transformations in low carbon logistics.

Evidence

The scale and scope of our assets and the capabilities of our delivery partners is significant.

There are 750 Advanced Manufacturing & Materials companies in our region that delivers over £8.5 billion in revenue employing over 10,000 employees in specialist clusters as diverse as:

Electronics | Life sciences | Advanced Materials | Robotics & Autonomy | Production AI In-Orbit Manufacturing | Clean Energy | Green Tech | Quantum Economy

- The world-leading Institute for Manufacturing (IfM) at Cambridge University aims to foster innovation and enterprise, delivering social and economic benefits for businesses and national governments globally. Their research and development teams focus on a wide range of manufacturing-related topics, including new materials, advanced production technologies, digital manufacturing technologies, and data analytics. Their work transforms factories, supply chains, and business models.
- The IfM Engage programme offers dedicated consultancy and development for c-level and senior management in companies of all sizes. One notable success is the Shoestring Digital Manufacturing project, which transforms production process management through affordable digital sensor and data collection interventions, costing as little as £300-£500.
- With a history stretching back to 1932, Caterpillar Perkins, based in Peterborough, is a world-leading provider of diesel and gas engines, providing the most comprehensive range of innovative and reliable power solutions, tailored particularly for large scale heavy vehicle off-road purposes especially for the construction industry.
- Marshall, based in Cambridge are trusted by the world's largest aerospace and defence OEMs, including Lockheed Martin and Boeing, to independently manufacture major parts and components and perform incredibly complex engineering tasks on their behalf, in addition to serving as a design authority on multiple aircraft types.
- Paragraf, a pioneering UK company in graphene technology and a Cambridge University spin-out, boasts two key R&D and manufacturing sites in Huntingdonshire. Specialising in the deposition of high purity 2D graphene for semiconductor production.
- Baker Perkins, located in Peterborough, employs 400 staff and supplies world leading food manufacturers. They have an on-site Bakery Innovation Centre dedicated to assisting customers.
- Space East, including Space manufacturing in terms of precision, strength, and durability and demand for high-precision parts. Photocentric Ltd in Peterborough have entered into a partnership with the European Space Agency to develop CosmicMaker, an LCD-based 3D printer tailored for use in space stations. CosmicMaker can print both plastic and ceramic parts and will be used to produce complex Silicon Carbide (SiC) parts in space.
- In Peterborough there are plans to build a £30M advanced energy research centre in collaboration with The Welding Institute to design practical methods to store and transport hydrogen safely and the production of sustainable aviation fuels.

Key Barriers

As set out in our Independent Economic Review, there is compelling evidence to demonstrate that our binding constraints are increasingly severe infrastructure gaps across water, energy, transport, digital and housing linked to skills that are holding back productivity and economic growth.

The water constraints are already severe, both in terms of scarcity and flood risk, and are a barrier to any new developments with the Environment Agency continuing to object to all new developments. Smart metering retrofit and other measures to address water usage can only go so far. The lead times for long term solutions also mean medium term solutions such as new pipelines are required whilst progress is made on building new reservoirs. Access to the grid to source new development is also a major barrier as there is no capacity. Equally, transport connectivity to support the expansion of the sector is poor, with shortfalls in road, bus and rail infrastructure that could enhance and strengthen linkages for this sector both in terms of accessing the ports and the wider East as well as linkages to the Midlands and the North. A first class modern and decarbonised logistics industry is also a key dependency to sustain national and international competitiveness.

Please see Priority 4 and Priority 5.

Linkages and Interactions

This cluster has significant linkages and interdependencies with the industrial heartlands of the Midlands and the North as well as opportunities as part of the wider East, including the coast. A key early intervention is for Government to support Phase 4 of the University of Peterborough – an R&D facility focused on innovative fuel technologies, especially hydrogen which will connect a number of other key strategic sites to focus on innovation, green engineering and advanced manufacturing.

This cluster could potentially form a crucial element of an 'investment super zone' (Investment Zone 2.0) that would also contain large swathes of the existing and expanding areas of the cluster were that a policy ambition of this government and thereby address the fact that our MCA remains one of only two without such a zone.

Equally, the cluster has a role to play as part of wider ‘powerhouse’ developments, including the Oxford Cambridge Partnership, the UK Innovation Corridor extending into London, and the wider East.

Growth Priority 3 – Digital and Technologies and Defence

Leverage our unique position as Britain's leading hub for semiconductor, AI, and supercomputing research and enterprise to drive the UK's advancement in next-generation digital infrastructure and data mining. This will enable us to enhance health outcomes and seize significant opportunities in energy generation.

Summary

We will:

Amplify our strengths in Digital and Technologies, where our research capabilities and the intersection of Semiconductors, AI, and Quantum Technology position us as global leaders in low-power chip design, supercomputing, and artificial intelligence. These unique assets drive life science research, fusion reactor development for clean energy, and the next generation of data mining and management, deepening our understanding of the world.

We will harness our world-class research assets and companies to collaborate and rapidly scale up innovations, delivering substantial growth for both the region and the UK.

Scope and rationale

Over the next ten years we will build on the institutional and company capabilities here that will continue to make the CPMCA region a leader in Digital and Technologies.

Our historical significance:

- The University of Cambridge Computer Laboratory boasts a 75-year history, marked by key moments in computing history. With 200 spin-off technology firms, including low-power chip designer ARM, it remains a powerhouse of innovation.
- Global leader in computing since the 1940s, when the University first utilised computing technology for mathematical calculations.
- The Mathematical Laboratory evolved into the Cambridge Computer Laboratory, pioneering computer-aided design (CAD), local area networks (LAN), the first multi-user access to a single device, and the webcam.
- Cambridge-developed computing technologies have empowered researchers across various fields, from astronomy, to economics to molecular biology, resulting in multiple Nobel Prizes. There are 125 affiliates of Cambridge University who have won Nobel Prizes.
- Nearly everything we have today can trace its origins back to ‘a Cambridge idea’.

Evidence

The scale and scope of our assets and the capabilities of our region are immense.

There are nearly 1,700 Digital and Technologies companies in our region that deliver over £8.5 billion in revenue employing nearly 31,000 employees in specialist clusters as diverse as:

Artificial Intelligence | Cloud Computing | Computer Hardware | Cryptocurrency | Cyber Security Data Infrastructure | Design and Modelling | Digital Creative | E-Commerce | EdTech | Fintech | Gaming | Immersive Tech | IoT | Photonics | Quantum Technology | Software Development | Streaming Economy | Telecommunications

"A key factor in Microsoft's choice for the location of its first research centre outside of the United States, was the proximity to Cambridge. As one of the world's best teaching and research universities, with historical links to the founding of computer science, Cambridge University's Computer Laboratory has been the hub for major advances in computing, including original work in building complete computers and the development of programming languages and operating systems. The technologies developed by the University, Microsoft Research and other leading technology companies in Cambridge will be fundamental in addressing some of the greatest challenges of this century."
William H. Gates III, KBE, Co-founder and Chairman of Microsoft, and Co-chair of the Bill & Melinda Gates Foundation.

"The Cambridge Computer Laboratory has been and continues to be, a world leader in the field of Computer Science. Its strong emphasis on academic excellence and solving real-world problems produces top graduates and post-graduates ready to work in world-leading technology companies. Qualcomm values the opportunity to sponsor and collaborate with excellent students and faculty in the Computer Lab and would like to congratulate the Lab on reaching this historic milestone. We look forward to many more years of collaboration."
Paul Jacobs, CEO, Qualcomm.

- Cambridge is a recognised global centre of expertise in the development and commercialisation of Artificial Intelligence technology. Significant overseas investments have been made by global investors, Samsung. Samsung is quoted as saying: *"The Cambridge area is a global epicentre of machine learning and one of the world's foremost hubs for AI research and development, home not only to world-class talent but also some of the most well-renowned AI scholars with whom we will co-operate closely."*
- Cambridge University is working with the UK Atomic Energy Authority on providing digital and artificial intelligence design for "Digital Twin" simulation to enable the build and commissioning of the first new STEP Fusion Power Station in the world in the UK. This collaboration is vital to help build a system monitoring approach to manage Fusion processes in a reactor where the temperature reaches around 15 million degrees centigrade.
- Darktrace, founded in Cambridge, is a global leader in AI-driven cybersecurity. Their technology continuously learns the normal behaviour of systems and transactions within the companies they protect, enabling them to quickly identify and isolate abnormal IT events, preventing system failures and enhancing overall protection.

- ARM, which was born in Cambridge, designs central processing unit (CPU) chipsets that pioneered low power designs and were adopted by Samsung and Apple in their smartphones such that ARM chips are in use in virtually every modern smartphone on the planet.
- Cambridge tech companies have in the first nine months of 2024 raised 62 venture capital funds with $892m invested so far, and the region is on track to overtake 2023's figure of $1.1bn total.

Major Defence Intelligence, Engineering and Logistics Assets

Cambridgeshire & Peterborough is home to a number of strategic Ministry of Defence bases including:

- RAF Wyton which is a UK Strategic Command Station and home to the National Centre for Geospatial Intelligence (NCGI), which provides intelligence support to UK Armed Forces on operations globally. From its base in Cambridgeshire, RAF Wyton is one of the biggest intelligence centres amongst Western allies.
- The Defence Intelligence teams comprise around 4,500 people and is the military-focused branch of the UK's intelligence community, which also comprises MI6, MI5 and GCHQ.
- Defence Secretary said, "As part of the 'Better Defence Estate Strategy', the UK Strategic Command Station at RAF Wyton will gain an enhanced integrated operations hub, designed to directly support UK Armed Forces on operations globally."
- RAF Alconbury & Molesworth houses the 423rd Civil Engineer Squadron which supports 11 joint and international units providing timely and accurate intelligence to support the planning and execution of NATO operations and enable deterrence and defence of the Euro-Atlantic area. It houses EUCOM's Joint Analysis Centre, NATO's Intelligence Fusion Centre, and AFRICOM's J2 functions.
- RAF Wittering in Peterborough provides co-ordination and oversight of the specialist engineering and logistics squadrons of the A4 Force. FHQ works with the Squadrons to make sure there are enough trained personnel to support RAF operations and exercises whenever and wherever they are called. When the Royal Air Force needs engineering and logistics support for an operation or exercise, FHQ are involved in scoping the requirement and determining how the Squadrons can successfully support that activity.

Key Barriers

As set out in our Independent Economic Review, there is compelling evidence to demonstrate that our binding constraints are increasingly severe infrastructure gaps across water, energy, transport, digital and housing linked to skills that are holding back productivity.

The water constraints are already severe, both in terms of scarcity and flood risk, and are a barrier to any new developments. Access to the grid to source new development is also a major barrier as there is no capacity. Equally, transport connectivity to support the expansion of the sector is extremely poor, with shortfalls in road, bus and rail infrastructure that could enhance and strengthen linkages for this sector both in terms of accessing skilled labour markets as well as improving access to wider markets through the ports and the wider East as well as linkages to the Midlands and the North. For RAF Wyton for example, both housing and transport connectivity, including the A141, are key.

Attracting and retaining talent for the sector and its supporting supply chains and addressing skills shortages across the industry remain key challenges.

Please see Priority 4 and Priority 5.

Linkages and Interactions

This cluster has significant linkages and interdependencies, particularly to the with Oxford and their region which emphasises the important work of the Supercluster and Ox-Cam Pan Regional Partnership

A key early intervention is to work with Government and plan and leverage innovation, new investment, commercial and other economic benefits, arising from the commitment to build the first reservoir in Britain for over 30 years.

The linkages here with Government's net zero ambitions and economic security also play well into the wider Economic Growth Mission. Also key here is recognising the importance of meeting our infrastructure gaps as binding constraints not just on productivity and economic growth, but also to achieve these outcomes in a sustainable way.

Horizontal Priorities – bridging our Infrastructure Gaps

Our key existing Assets and surrounding context

Set out below is an illustration showing our key assets and the surrounding context that gives a sense of scale and how important it is to embed infrastructure solutions to unlock the opportunities across the area for nationally significant economic growth.

Our widening Infrastructure Gap

Our next two Priorities are about unlocking what are binding constraints on the growth of our clusters and sectors outlined in the three priorities above.

The central theme is poor and deteriorating infrastructure that is a major barrier to future growth.

As already outlined, Cambridgeshire and Peterborough is an area that has a strong track record of delivering high levels of economic growth and hosts a significant part of the UK's globally competitive economy and continues to deliver a net contribution to the Exchequer.

Unfortunately, infrastructure delivery has not kept pace with our exceptional levels of growth and there is a risk, as identified in our first and refreshed economic modelling work arising from our Independent Economic Review, that the acute pressures this has placed on the area and the growing cost to businesses and productivity, are significantly undermining and 'choking off' the areas contribution to the Growth mission. In Cambridge in particular, this is undermining its globally competitive edge that impacts the UK's economic performance.

A recent Cambridge Ahead report demonstrated that for Cambridge, by 2051, there could be 125,000 fewer jobs created due to the infrastructure gap. **The scale of that lost growth and**

opportunity (the net present value of GVA lost) for the period 2021-2051 could total from £164.1bn to £178.5bn, relative to the potential of jobs growth anticipated by 2018 forecasts.

Despite the current scale of the gap, the foundations of the Cambridge economy do remain strong. Cambridge remains a national outlier in terms of job creation and wealth generation in the sectors of the future. There is latent capacity to grow, at pace, if these constraints are removed as well as uplift the wider area as a whole.

In order to get a real sense of the scale and scope of the challenge as part of the development of our Local Growth Plan we are producing a long-range Infrastructure Plan. This will outline the value of our future forecast growth, and how, by working together we can secure sustainable solutions, identifying costs and scope to deliver against them through fiscal freedoms and instruments. The planning and associated interventions will transform the way in which our clusters expand, compete and intensify, bringing stronger market share and impact for both our area and the UK.

Horizontal Growth Priority 4 – Transport Connectivity

A shared Growth Priority with Government

In collaboration with Government, we will improve transport to make connectivity including commuting more efficient, affordable and effective, and to open up housing, business and industrial development sites across the region. Addressing this will require HMG and CPCA to work together to explore actions including how to:

- Identify options and investment for an improved and better joined up transport network, including opportunities to address congestion and connectivity issues in and between key urban sites like Cambridge and Peterborough and their surrounding areas through improved public transit.
- Engage national rail infrastructure plans to support the region's growth ambitions.

This would enable workers and businesses to move efficiently and reliably between Cambridge and other key industrial and commercial employment sites across other parts of the region, boosting productivity.

Severe constraints on the supply of skilled workers relative to demand is stifling further growth. Addressing this would require improving the affordability and availability of housing and improving good quality and reliable transport connectivity within the area, allowing high skilled workers to locate in key locations (including Cambridge and its surrounding area) and enabling them to move rapidly and efficiently in and around the area and to other key industrial and employment sites across other parts of the region.

Key Drivers

- Our knowledge-intensive science and technology innovation clusters and sectors are caught up in a global war for talent and Cambridge and its surrounding areas are competing with other world city regions to both attract and retain high-end talent.
- Sustaining our competitiveness and securing future economic growth not only depends on attracting and retaining this talent but also having access to the necessary skilled workforce to support the impact of growth in these sectors to meet demand both in terms

of the directly created jobs, but also indirectly in terms of the impact within the necessary and supporting supply chains to meet that demand.

- A major barrier to accessing a skilled labour market is housing availability and affordability. The work done as part of our Independent Economic Review and more recently the Case for Cambridge, recognises the city as one of the most expensive in the UK for buying a home, second only to London relative to local pay. This position is exacerbating as an unintended consequence of an increasingly successful economy and, as these priority sectors and clusters expand, unless addressed. Equally, the overall supply of skilled labour needs to increase in line with demand, so issues of capacity need to be addressed. As referenced in Priority 1 affordability touches aspects of many key drivers of future growth including incubator space and whilst planning conditions can be set to enable affordable provision, this equally impacts on both attractiveness of developments and their overall viability and competitiveness with other parts of the world. Support is required to enhance opportunities to enable high quality and sustainable development, that also tackles inclusivity.
- Transport connectivity is caught up in a similar way and is increasingly a major barrier, too. Support workers not only cannot afford to live within the area but then struggle to access the jobs because of poor physical connectivity and traffic congestion. Equally, our priority science and technology multi-sectoral innovation cluster depends on knowledge spillovers, highly interactive movement within the eco-systems and access to shared environments and spaces, as well as reliable and effective international connectivity as part of accessing wider markets.
- Additionally, actively engaging to support a healthy workforce is a foundation for these developments, and addressing health and social care challenges as a barrier to the skills and talent required to meet the needs of our priority cluster and sectors, must feature, too.

Levers

- Accelerate the construction of new sustainable homes, including affordable and council-owned housing.
- Establish strong oversight and collaboration with the Cambridge Growth Company.
- Establish strong partnerships with Homes England and build on existing relationships with developers, house builders, investors, associations and wider partners.
- Make a significant push on skills development to address the recruitment challenge posed by our sector growth and the forecast jobs (125k) so that supply is aligned with demand.
- Develop planned rail enhancements and new stations including Ely Junction, Cambridge South, Cambridge East, Alconbury and East West Rail. Additionally, establish a strategic partnership with Great British Railways to develop future improved services, an international station at Peterborough, and stronger rail connectivity across the whole area to support our sector growth.
- Continue to support the Greater Cambridge City Deal package of transport interventions and the development of the Greater Cambridge Transport Strategy, as well as the other sub-regional developments within the region, as part of the future development and delivery of the wider LTCP which will require an adequate funding settlement.
- In the short term, develop CSET to provide guided buses to connect the science parks in south Cambridge, that can also be picked up as pathways for a future tram system.

- For the longer term, revisit and re-present our case for a new tram system, as a credible mass transit system to better connect the nodes within our key clusters and sectors. With such a strong economy, a user pay model is highly likely to attract considerable private sector investment and unlock significant economic benefit, helping our area to compete with the connectivity and quality of our global competitor city regions.
- Combining these interventions unlocks enormous potential to embed a multi-modal integrated public transport system, including buses and active travel, allowing for the expansion and diffusion of our high growth priority sectors and clusters. Failure to fund and invest significantly in this infrastructure will divert investment to other opportunities elsewhere in the world and directly hinder the UK's international competitiveness.

Asks

- Deeper devolution across the skills system to bring greater tailoring of provision to sector and sub-sector talent and skills needs, addressing gaps and shortages.
- Deeper devolution across fiscal instruments and planning will help unlock opportunities and these barriers to growth.
- A single settlement, or clear support from HMG for our interventions and programmes would unlock enormous opportunity and meet the economic mission of 'kickstarting economic growth' given we already are delivering it but are in huge danger of losing it.
- Individual support and funding for the identified schemes.
- We will sweat our existing devolution functions, powers and programmes more, including seeking opportunities for leveraging deeper devolution and 'levelling out' as well as closer alignment through settlements and co-development and delivery with all HMG departments.
- We will bring closer alignment through long range infrastructure planning by convening relationships and plans between local authorities, utilities, national bodies and agencies, including the National Infrastructure Commission, GB Rail, National Highways and Homes England, as well as align existing strategic initiatives, including the GCP City Deal, Ox-Cam Pan Regional Partnership, East West Rail, UK Innovation Corridor, building a clear framework that brings confidence to underpin private and public investment at scale. HMG support for us as the key convenor is important to secure alignment.
- Support for our transport, housing and mixed-use development asks conditional on credible business cases, that also unlock the opportunities embedded in the growth and expansion of our successful tradeable sectors.
- Support for our public services infrastructure must be funded and supported to keep pace with developments so that sustainable places and communities are enhanced, maintained and created so that we can align the planning and delivery of community and social infrastructure (schools, health, community spaces etc).
- particularly in relation to major housing developments. This is particularly important to create the appropriate sense of place and community if the area is to attract and retain people and these can be key differentiators when we it comes where people choose to live. Whether this is included in this submission or not we will continue to highlight this as being an important feature of any future growth strategy for C&P.

Rationale

- Our skills system remains fragmented and the links from early years to schools through to FE and HE to re-engaging adults prevents a tailored and prioritised approach, based on existing strengths and opportunities within the area. There is scope for a more locally led joined-up approach that aligns without sector and cluster priorities and developments.
- Our fast-growing cities and market towns provide credible market-led opportunities for sustainable development of existing areas and new settlements.
- The partners across the Combined Authority area have already earmarked the land to accommodate the region and the country's current shared growth ambitions.
- We are proactively already playing our part in supporting the government's ambition to enable the building of 1.5 million new homes.
- We have a track record of delivering award-winning high-quality developments across our area and the identified capability, including through earmarked strategic scale new settlements and urban extensions, to meet the governments mission for further accelerating delivery of new and affordable homes. For example, Cambridge has delivered more social homes than any other local authority in the country, bar one, with an offer to deliver another 1,000 at a cost of £209M. Additionally, the build-out rate for Greater Cambridge is significantly quicker than the national average, with a 15% gap between consents and delivery of homes locally, compared to a national average of 26%.
- Underpinning our planning frameworks for new homes where our existing and future skilled workforce can live are the economic opportunities capable of being realised on a portfolio of exceptional new and expanding employment sites and research parks.
- A development pipeline on identified and allocated land for over 100,000 homes and 140,000 new jobs to power the UK industrial strategy. But we cannot do this alone or do more, without wider collaboration with Government and its agencies.
- The Cambridge housing affordability ratio for example is 13:1. In the last 10 years, house prices in Cambridge have increased by 78% and pay by only 23%. Rents are also high, often making it difficult to live close to work, particularly for those on lower incomes who may not feel that they are the beneficiaries of the quality of life afforded to higher earners in the area. In contrast our more marginalised areas to the north and east, particularly in the Fens require intervention to overcome viability issues.
- Within Cambridgeshire & Peterborough, Homes England currently have a pipeline of 67 projects worth £1.24bn to build over 65,000 homes. These figures exclude the work and ambition set out by the Cambridge Delivery Group and within the Case for Cambridge.
- The extent of congestion and poor physical connectivity is well evidenced and the current trajectories over time remain alarming. The block on future growth is extensive and impacts nationally.
- Realising that opportunity at pace will require collaboration between us as the CPCA and our wider partners, our institutions, businesses and you as Government; to support housing delivery; resolve infrastructure barriers; support our institutions endeavours and facilitate overseas and national investment in research and innovation. We stand ready.

Horizontal Growth Priority 5 – Unlocking Housing and Commercial Development

A shared Growth Priority with Government

In collaboration with Government, we will increase the availability and affordability of housing and commercial development sites to support the expansion of CPCA's priority sectors, and to increase the region's attractiveness to workers and investors. Opening up sites will unlock and accelerate CPCA's priority sectors' tremendous potential for economic growth. Addressing this will require HMG and CPCA to work together to explore actions including how to:

- Deliver innovative partnerships and models could unlock sites for both housing and commercial development
- Work together to address planning capacity constraints and local site viability issues, such as potentially addressing infrastructure constraints in energy and grid capacity, water supply, and digital connectivity

This would expand the region's skills supply and attract private and international investment in high potential sectors, while also supporting environmental improvements to drive sustainable growth.

Our priority sectors have tremendous potential for growth, but this potential is currently severely constrained by the need for enhanced utilities infrastructure, particularly in areas like water, energy, and digital connectivity. By accelerating investment in these critical areas, we can support sustainable growth and attract both private and international investment. This approach ensures that economic development and environmental improvement go hand in hand, creating a more competitive and thriving UK economy. Failing to address these barriers means the UK is losing out on investment to global competitors.

Key Drivers

- The Environment Agency is currently objecting to all developments across the south of our area due to water scarcity and an inability for adequate water supply to support them.
- Drainage Boards have outlined pressures which constrain growth through resource capacity issues with the existing drainage board infrastructure being unable to respond to growth opportunities placing additional burdens on developments. An unsustainable funding structure a root cause of this barrier.
- There is no energy grid capacity to support new developments, and this is particularly severe in the north of our area and a particularly severe constraint to our advanced manufacturing ambitions, given the power levels required.
- Digital speeds and coverage are constraining the expansion of our priority sectors and clusters in our more rural areas and communities.
- Local Area Energy Plan complete for Peterborough and in progress for Cambridgeshire. Annual energy demand in Peterborough will increase by 50% by 2040 to decarbonise transport and heat, electricity demand is forecast to triple in Cambridgeshire (2050?)
- Significant constraints on the low voltage network across the region with capacity upgrades being required for both substations and feeders, insufficient substations on the southern fringe, high voltage feeder network upgrade required north of Peterborough city centre

- Opportunity for large scale renewable generation, storage and demand side flexibility
- There is an uneven distribution of gigabit-capable broadband infrastructure, with significant gaps in both rural and urban areas.
- Local authority planning and highways teams lack sufficient resources and expertise to facilitate the deployment of digital infrastructure effectively.
- Independent surveys have found areas with worse mobile coverage than modelled by Ofcom and mobile network operators, making it challenging to secure investment for improvements.
- Local authority land, buildings, and assets are not widely available for deploying digital infrastructure, causing delays and preventing improved connectivity.

Levers

- In the short-term interventions and resources to accelerate smart metering retrofitting in existing and including in new homes
- In the short-term interventions and resources to improve the water credit system
- For the medium term, transfer water into the Cambridge Water Company from the nearby Grafham Water reservoir operated by Anglian Water constructing a pipeline and treatment facilities. This would bring essential new water supply to enable growth.
- For the long term, support the development of the Fens Reservoir a £3bn project to help meet growing water demands for our area.
- Whilst we won't see growth brought to a complete standstill due to water resources pressures there is a real risk that the pace and nature of our future growth will be seriously undermined in the lead into the bigger infrastructure solutions such as the reservoir and the pipeline.
- In the short-term deployment of Peterborough Integrated Renewables Infrastructure (PIRI) a smart local energy system (£14.5m) and roof top solar
- In the medium-term ground mounted PV/large scale renewable energy generation and storage, Peterborough district heat network expansion (city centre)
- Project Gigabit, which includes a £69 million investment to support the delivery of full fibre to around 45,000 premises, with works expected to be completed by 2027.
- The 'Dig Once' Policy, which integrates digital infrastructure into new transport initiatives. It aims to reduce carbon emissions, minimise disruption, and improve digital connectivity by installing fibre ducting during new transport infrastructure projects. Over 21 km of additional fibre ducting has been installed or is planned by 2025.
- The Cambridgeshire Open RAN Ecosystem (CORE) Project. An exciting initiative aimed at developing and trialling a new, advanced 5G Open Radio Access Network (RAN) platform in Cambridge. The project aims to demonstrate the feasibility and reliability of Open RAN technologies, ultimately improving mobile capacity and connectivity in busy areas.
- The first commercial Small Cell Licence Agreement has been signed as a pilot to assess the long-term sustainability of deploying 4G small cells on the region's street lighting assets. Small cells will play a fundamental role in boosting mobile capacity in the region.

Asks

- Support for accelerating the implementation of smart metering and improving the water credit system to reduce demand.

- Support and enable the delivery of the Grafham pipeline, ensuring the funding from the water companies is identified in the investment plans being reviewed by Ofwat and ensure timely programme delivery – there is currently a perceived £50M shortfall arising from the price review planning process.
- Support and enable the delivery of the Fens reservoir, including confirmation of next round of investment funding to water companies to facilitate delivery, support the timely delivery of the NSIP programme, and work to capture the benefits of the reservoir including the associated commercial and innovation opportunities linked to our priority clusters and sectors.
- Planning interventions that require new commercial development to meet water efficiency benchmarks and adopt rainwater harvesting and greywater recycling could be enhanced with additional support, given the potential for lost growth.
- Equally existing businesses and sites wanting to expand may need to achieve water savings within their own buildings and operations to create headroom for growth (the decision notice on the cancer research hospital is great example of this). There's a lot of work underway on data centres and AI infrastructure too, which may need to invest in alternative cooling technologies rather than rely on potable water. These trade-offs may need incentives and support to accelerate their delivery.
- Generally, support the various organisations and partnerships working hard to resolve the water scarcity challenge in the short, medium, and long-term including relevant water companies, Water Resources East and the Greater Cambridge Shared Planning team who are all working together as part of the Cambridge Water Scarcity Group.
- Support for conventional investment in grid capacity alongside flexibility and storage to include investment in a new substation to the west of Peterborough on land currently in ownership of Homes England. Investment in the grid in this area would unlock growth up and down the network enabling significant housing and employment growth in the Peterborough and Huntingdonshire areas. Investment required would be for a new primary substation of 240MW requiring circa £70M of investment. This would then also unlock large scale renewables.
- Support for large scale renewable energy generation, storage, heat decarbonisation and community energy. As above would require investment in a new primary substation of at least 240MW to allow the required grid export capacity increases.
- Support to develop renewable energy ownership and finance models e.g. community energy, and financial models to encourage domestic and commercial rooftop solar uptake.
- Continue to support and fund digital infrastructure projects such as Project Gigabit.
- Support and introduce policies that remove barriers to wayleaves, planning, and highways to facilitate the efficient deployment of digital infrastructure.
- Promote and support the deployment of alternative broadband solutions such as 4G/5G broadband, satellite, and fixed wireless access in areas where traditional fibre deployment is not feasible.
- Provide funding for pilot projects like the Cambridgeshire Open RAN Ecosystem (CORE) and Smart Infrastructure Pilot Project (SIPP) to trial new technologies and demonstrate their benefits.

Rationale

- Demand reduction from smart metering and water credits would help deal with the immediate and growing short term pressures as well as embed better water usage.
- Without the Grafham pipeline and its ability to provide bulk transfer, and because there are no other credible or deliverable alternative supply solutions, the future growth potential of Greater Cambridge will be brought to a halt. It will bring water to 829,000 people.
- The Fens reservoir is a key long-term solution meeting the future water needs of the area, unlocking new growth within the Greater Cambridge area enabling circa 50,000 homes and circa £10bn+ economic growth.
- The low voltage grid is at capacity, smart local energy system deployment will reduce strain on the network, flexibility services have the potential to reduce peak energy demand by 20%.
- Peterborough Local Area Energy Plan has identified capital investment of £8.8bn, including £1.6bn investment in energy networks, 1.3GW opportunity for large scale renewable energy generation (with storage), 400MW solar rooftop potential. Financial and business models are needed to attract private sector investment, supporting joint ownership and community energy.
- As part of deeper devolution there is a case for stronger collaboration and joint working between Mayoral Combined Authorities and NDPBs and arms-length public bodies to enable closer prioritisation and alignment and this could usefully include key strategic partnerships with the utilities, their regulators and providers, as well as bodies such as the Environment Agency. Precedents are already in place.
- High-speed internet access enables businesses to operate more efficiently, supports e-commerce, and retains and attracts tech (and other) companies.
- Reliable internet access is essential for remote learning, online training, and job opportunities, helping to bridge the digital divide and foster a more skilled workforce.
- Improved digital connectivity supports Smart City Initiatives, supporting the development of smart infrastructure, such as smart street lighting and traffic management systems, enhancing urban living.
- Failure to fund and invest significantly in this infrastructure will divert investment to other opportunities elsewhere in the world and directly hinder the UK's international competitiveness.

National Industrial Strategy

Consultation response key points:

- Recognition of the role of the Cambridge eco-system in innovation and life science and tech.
- Inclusion of Agri-tech as a key sector
- Clarity on how the Combined Authority is expected to support its Local Growth Plan, and necessary funding and powers to do so.
- Clarity on cross-government approach to supporting delivery
- We identified growing Skills gaps as a barrier to delivering any Industrial Strategy and pressed for further support such as by extending training and apprenticeship opportunities and making them available for individuals throughout their career to ensure they have skills for a changing labour market.
- Energy Connectivity- sought a review of the energy supply regulatory regime that could explore options for a more agile, anticipatory and responsive energy infrastructure planning pipeline.

Industrial Strategy:

- National Industrial Strategy and first sector Plans published today
  - Life Science published to align with NHS Birthday (5th July)
  - Defence will be published later this year
  - Financial services published to align with Chancellors Mansion House Speech (Early to mid July).

Government has set out commitments for each sector with the ambition that by 2025:

- Advanced Manufacturing sector will achieve a near doubling of business investment to £39 billion per year
- The UK will be Europe's leading defence explorer, will have closed the gap for venture capital investment into defence with the US by half…
- The UK will be the leading European Hub to create, invest in, and scale, fast growing Digital and Technology businesses, with £3 of private R&D investment in the sector for every £1 of public R&D funding
- The UK will, by 2030, be the leading Life Science economy in Europe; and by 2035 the third most important life sciences economy globally.

Whole-of-Government approach to the Industrial strategy and embedded it into the recent Spending Review to ensure its priorities are 'hard-wired into departments' budgets'.

Place-based Growth

- Local Growth Plans- 'We will back Mayors to implement their plans by giving them more powers…underpinned by flexible integrated settlements, where applicable, and other devolved funding
- Grow High-potential innovation ecosystem with through the Local Innovation Partnerships Fund (announced before CSR)
  - £500 million across the UK
  - At least £30 million each for the 7 Established MSAs, competitive bid for all other areas
- Interventions for Oxford-Cambridge Corridor:
  - Back East West Rail
  - New East Coast Mainline Station at Tempsford connected with EWR
  - Back construction of Fens Reservoir
  - Explore how to strengthen collaboration between Ox-Cam and other areas of the UK – build on Cambridge-Manchester Innovation Partnership
  - Fund Cambridge Growth Company to 'invest in infrastructure to unlock housing and commercial development, enter into partnerships with the private sector, and work with Local Partners on infrastructure delivery, with more details to be set out shortly'
- Public Sector Partnerships
  - National Wealth Fund- Trailing strategic Partnerships with GMCA, MYCA, WMCA & Glasgow City Region
  - Office for Investment- Will establish a National Investment Partnership offer for Mayoral Strategic Authorities, and will launch a Strategic Investment Opportunities Team to identify, shape and deliver strategic investment opportunities
  - UK Export Finance- Expand network of Export Finance Managers in City Region clusters
  - British Business Bank – Establish a Cluster Champions team starting with GMCA, Liverpool City Region, SYMCA, North East, West of England, Glasgow, Cardiff and Belfast

Skills

- Skills system will be aligned with the 8 Growth Driving sectors in the Industrial Strategy
- Growth and Skills Levy:
  - Govt will continue to roll out shorter duration and foundation apprenticeships
  - GSL will fund new short courses in areas such as Digital, AI and engineering
- Lifelong Learning – Lifelong Learning Entitlement launched from Jan 2027
- Technical Excellence Colleges – Expand beyond construction to engineering, defence

International Trade & Investment

- Government reaffirm commitment to Freeports and Investment Zones
- Seek to provide businesses with a 'first-class concierge service' through the Office for Investment
- Clear entry points for Growth driving sector businesses into government
- Minister for Investment will directly lead the most complex negotiations with globally mobile investors and strategically important companies with a mandate from the Prime Minster and Chancellor to progress discussions quickly and efficiently.
- Implemented the 6 headline recommendations from the Harrington Review
- Refocused the Government's overseas network – directed export and investment officials and Diplomats in major markets to prioritise the 8 Growth driving sectors to build a pipeline of opportunities for the UK – Ambassadors and Trade Commissioners will develop in partnership and deliver strategic plans to support the 8 sectors

Life Sciences

- Oxford and Cambridge recognised as a Life Science cluster with significant economic potential.
- £520 million to attract 'globally mobile manufacturing investments' to the UK through the Life Sciences Innovative manufacturing Fund
- Seek to secure at least one major strategic partnership annually with leading life science companies, and establish a dedicated support service to help 10-20 high potential companies to scale, attract investment and remain headquartered in the UK
- Streamline regulation and market access

Advanced Manufacturing

- Agri-tech recognised as a frontier industry supporting Advanced Manufacturing

Interventions:

- Reduce electricity costs and establish a 'Connections Accelerator Service' by the end of 2025 to give higher priority for schemes that will deliver significant job opportunities.
- £4.3 billion to drive innovation and commercialisation in the frontier industries over the next 5 years
- Build sectors skill base – through wider skills system reforms and new advanced manufacturing Upskilling and Reskilling programme of short courses

Defence

- Accelerate the adoption of novel and dual-use technologies by:
- Launch UK Defence Innovation to identify, develop and procure cutting edge technologies (£400 million budget) – alliance with the High Value Manufacturing Catapult
- Create and Office for Defence Exports – help UK exporters compete and win in the global market

Digital and Technologies

Frontier industries: Advanced Connectivity Technologies, Artificial Intelligence, Cyber Security, Engineered Biology, Quantum technologies, Semiconductors

- Invest in R&D and Scale-up infrastructure
- Create a more supportive regulatory environment
- Strengthen international partnerships
- Establish a new Sovereign AI Unit within government with a budget of £500 million to maximise the UKs stake in frontier AI.

Mayoral Combined Authorities comparison

MCA	**Party of Mayor**	**Allocation**
Cambridgeshire and Peterborough	Conservative	• Unspecified funding for Cambridge Growth Company • Eligible to bid for Local Innovation Partnerships Fund • BBB Nations and Regions Investment Funds extended to East of England and South East with £350m
East Midlands	Labour	• Share of £160m for Investment Zones/ Freeports • Eligible to bid for Local Innovation Partnerships Fund
Greater Lincolnshire	Reform	• Eligible to bid for Local Innovation Partnerships Fund
Greater Manchester	Labour	• Share of £160m for Investment Zones/ Freeports • £30m from Local Innovation Partnerships Fund • Share of £244m for regional Civil service Hub (Manchester First Street) • British Business Bank Cluster Champion area • NWF Strategic Partnership trial region

		• Share of £150m from a new Creative Place Growth Fund • New Professional and Business Services Hub
Hull and East Yorks.	Reform	• Eligible to bid for Local Innovation Partnerships Fund
Liverpool	Labour	• £30m from Local Innovation Partnerships Fund • British Business Bank Cluster Champion area • Share of £150m from a new Creative Place Growth Fund • New Professional and Business Services Hub
North East	Labour	• Share of £160m for Investment Zones/ Freeports • £30m from Local Innovation Partnerships Fund • Share of £244m for regional Civil service Hub (Darlington Economic Campus) • British Business Bank Cluster Champion area • Share of £150m from a new Creative Place Growth Fund • Pilot region for Partnership to develop an Electric Vehicles Manufacturing cluster
South Yorkshire	Labour	• Share of £160m for Investment Zones/ Freeports • £30m from Local Innovation Partnerships Fund • British Business Bank Cluster Champion area
Tees Valley	Conservative	• Eligible to bid for Local Innovation Partnerships Fund
West Midlands	Labour	• Share of £160m for Investment Zones/ Freeports • £30m from Local Innovation Partnerships Fund • NWF Strategic Partnership trial region • New Professional and Business Services Hub
West of England	Labour	• British Business Bank Cluster Champion area
West Yorkshire	Labour	• £30m from Local Innovation Partnerships Fund

		• NWF Strategic Partnership trial region • Share of £150m from a new Creative Place Growth Fund • Jobs and Careers Service pathfinder pilot area • New Professional and Business Services Hub
York & North Yorks.	Labour	• Share of £244m for regional Civil service Hub (York Central Hub) • Eligible to bid for Local Innovation Partnerships Fund
London	Labour	• £30m from Local Innovation Partnerships Fund • BBB Nations and Regions Investment Funds extended to East of England and South East with £350m
Non-England City Regions		
Cardiff City Region	N/A	• British Business Bank Cluster Champion area
Glasgow City Region	N/A	• British Business Bank Cluster Champion area • NWF Strategic Partnership trial region • New Professional and Business Services Hub
Belfast City Region	N/A	• British Business Bank Cluster Champion area

- Northern and Midland Mayoral City Regions with the highest productivity Catch-up and agglomeration potential also to receive an unspecified amount from a new Local Growth Fund – recipients to be confirmed by MHCLG
- UK Export Finance – expanding its network of Export Finance managers in City Regions & Clusters

Life Science Sector Plan – summary

Headlines

- Delivery of sector plan focuses on:
  - Investment in discovery and curiosity driven science
  - Delivering applied research and supporting companies to invest in R&D at scale
  - Prioritisation, governance, accountability, and incentives
- Two to three regions with 'strong Life Sciences, health and data assets' with be identified as trailblazer Regional Health Innovation Zones
- More detail on the Wellcome Campus based Health Data Research service – operational by Spring 2026
- Creation of a new Mayoral Strategic Authority Life Sciences Working Group to align local and national objectives on life science investment

Background

- Reduce regulatory barriers to market entry
- Focus 'discovery' investment specifically on:
  1) Translational models and networks
  2) Commercial clinical research
  3) Data and genomics capabilities
- Update governance model of NIHR to work to a 'dual health and growth' mandate
- Promote the transition away from animal testing – publish strategy to support uptake of alternative pre-clinical models by the end of 2025
- Office for Life Science will establish a new Mayoral Strategic Authority Life Science Working Group to align local and national interventions for maximum impact and identify how to support life science focused investable propositions in LGPs. Also
  - Establish regular strategic dialogues with English Regions to identify and develop investable propositions, align local and national funding streams and support regional ambitions
  - Maintain close collaboration with Local Authorities and regional ecosystems

Innovation

- Establish regional health innovations zones to experiment, test and generate complex innovative interventions – two to three regions with 'strong Life Sciences, health and data assets' will be identified as trailblazers - Positioned strongly for this
- Update and expand the Innovation scorecard to strengthen innovation metrics and reduce variation in uptake

- Introduce an 'Innovator Passport' for Medtech by 2026 to enable better sharing of evaluation information

Health Data

- Establish a national Health Data Research Service with the aim to appoint a CEO and Chair of board by autumn 2025 and operational by spring 2026 –based at the Wellcome Genome Campus (previously announced)

Access to finance

- Address the conclusions made by the Harrington Review
- British Business Bank support:
  - Additional £4bn across the 8 Industrial Strategy sectors
  - £12bn of private sector capital
  - Publish data on VC investment portfolio returns
  - Work in partnership with UK Export Finance to provide support for Life Science SMEs to export

International Trade

- Implement the Trade Strategy
- Tailor export promotion and finance to the needs of the sector
- Champion international regulatory harmonization through mutual recognition Agreements and the Ricardo Fund
- Support strong IP protection through participation in the WTOs Agreement on Trade in Pharmaceutical Products
- Develop a new supply chain Centre to identify and protect vulnerabilities

Partnership with Industry

- Refresh the Life Sciences council – the most senior Industry-Government forum working with the Industrial Strategy Council
- Appointment of Industry Champions and Life Sciences Investment Envoy
- Continue to publish Life Sciences Competitiveness Indicators annually
- New 'bespoke approach' to supporting investments worth more over £250 million through the Life Sciences Large Investment Portfolio
- Deliver the £520m Life Science Innovative Manufacturing Fund grants to build the UKs attractiveness as a location for investment and to stimulate growth in the Life Sciences manufacturing sector
- Work with Office for Investment to provide support for 10-20 High-potential UK companies to scale, invest and remain in the UK through a dedicated service

Measuring Success

- Annual Implementation Update to summarise progress against the overarching targets Government has set for growth of the sector
- Ministerially led Life Sciences Delivery Board will assess progress and drive delivery. Will report on a six-monthly basis to the Life Sciences Council
- Monitoring and evaluation will be set against 6 core metrics
  - Exports
  - Business Investment
  - GVA
  - Productivity Growth
  - Labour Market Outcomes
  - Number of new, large 'Home Grown' businesses
- Life Science Sector Plan will be reviewed by 2030, earlier if there is a reason to do so

Further information

Life Science Sector Plan

National Industrial Strategy and Sector Plans

Useful summary from LinkedIN

CPCA Name Checks / Implications

- the **Laboratory of Molecular Biology**, one of the world's preeminent scientific institutions, will also receive a 10-year funding allocation to support pioneering research, foster global talent, and drive breakthroughs that underpin the Life Sciences sector.
  - LMB is based on Cambridge Biomedical Campus and is funded by the Medical Research Council

- Catalysing the UK's health data and genomic potential – our Wellcome Genome Campus is already one of Health Data Research Centres and continued expansion of genomics
  - Expanding site Go-ahead for new Life Science buildings at the Wellcome Genome Campus – WGC
- a dedicated support service will be established to help 10–20 high-potential UK companies to scale, attract investment, and remain headquartered in the UK.
  - This could include a few of our regional companies like CMRSurgical, Bicycle Therapeutics,

Statements from regional stakeholders:

"The Life Sciences Sector Plan sets out an ambitious and exciting vision for unlocking the potential of NHS data. By combining this data with large-scale genomic data from clinical samples, we have an unprecedented opportunity to understand, predict, and ultimately prevent disease. With trusted, secure, and streamlined access to data and samples at scale, the UK can lead the world in delivering a new era of personalised, predictive healthcare."
Sanger Institute, Genome Campus Hinxton