



Summer Publication 2019

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Introduction



Jane Paterson-Todd
CEO

Quality of life is fundamentally important to the attractiveness of Cambridge as a world-leading city region, and so is the underlining thread running through all our considerations and workstreams. We have stimulated new discussion on the topic with local and national experts – including at a member event held in March as described later in this newsletter.

We are also exploring in our specific workstreams how quality of life impacts the multitude of ways in which people live, work, and play. In our housing considerations, we are taking a far richer and meaningful deep dive into the foundations of 'future living' and the factors that will make our way of living easier through technological advancement, whilst capturing the spirit and culture of community cohesion. This work has captured the attention of our new Young Advisory Committee of under 35's, to ensure their needs are also fully considered on making housing an affordable and attractive option for future generations.

On a more business focused platform, our technology group is exploring how technology adoption in the workplace could help deliver greater levels of productivity and offer environments which may help our businesses to develop their competitive advantages and continue to attract local and global talent.

We continue to recognise the importance of developing a workforce that meets the specific needs of local industries. To this end, our skills group is advocating for a more coherent, streamlined and flexible framework for the apprenticeship levy to help smaller organisations benefit

from it, as well as encourage more organisations to participate.

Ensuring young people have a wider vocabulary on career possibilities is not just a local consideration, it is core to shortening the skills gap across the country. Cambridge could be an exemplar, by producing a Career Provision map recording all external career advisory services that secondary schools and 6th Form Colleges could successfully and easily access, to ensure young people are fully versed on the myriad of career paths available to them. This important research will be undertaken in September and we will be reporting on the findings in our Spring newsletter in 2020.

On transport, we have worked closely with the Greater Cambridge Partnership researching the considerations for, and attitudes towards, forms of congestion management. This research garnered over 5000 responses from Cambridge Ahead members and other communities; the details are summarised in our transport section. The most welcome sign is that people realise there needs to be some form of charging management that will allow Cambridge to be more free flowing on its road network and will generate income to enhance and

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We exist to make Cambridge a place where business can continue to thrive, helping to ensure a compelling quality of life for the city's residents and workers, whilst preserving the unique nature of Cambridge.”

Jane Paterson-Todd

dramatically improve its transport public services.

We have forged a strong relationship with London First this year on a number of levels and continue to stay in close touch with them regarding Brexit, where our priorities remain those put forward in the Cambridgeshire & Peterborough Independent Economic Review (CPIER) maintaining the ability to source the best talent from the EU and around the world, whatever structural solutions emerge on Brexit, for our academic and business community at all levels.

I hope you find the detail of our workstreams of great interest. I would like to extend my thanks to the Chairs of all our groups, Matthew Bullock – Growth; Sue Chadwick – Housing; David Braben – Transport; Anne Bailey – Skills; Faye Holland – Technology; Alex Plant – Policy; Rob Carter – Young Advisory Committee and all the people from our membership involved in the groups. They deserve a huge thank you for the work and commitment they offer.

Have a good Summer,

Jane Paterson-Todd
CEO



Quality of Life



Dr David Cleevely CBE
Chairman, Raspberry Pi

Quality of Life in Cambridge: What is it, how do we implement and measure it?

Cambridge Ahead events bring thought-leaders together to debate and discuss topics closest to our agenda. Our latest event, held at the University Arms Hotel on 14 March, was no exception. Quality of Life in Cambridge was the topic – the aim being to kickstart a new debate – what is Quality of Life, how do we implement it and importantly, how do we measure it?



People often talk about sustainability as if it's about the environment, ...but it's also social and political, it's about a society that all members are happy to live in leading a meaningful life, feeling that they have enough control of their own destiny"

Professor Diane Coyle

Chaired by Dr David Cleevely CBE, the panel consisted of First Bennett Professor of Public Policy, Professor Diane Coyle OBE, expert in planning law, Dr Sue Chadwick, and Managing Director of Huntingdon District Council, Jo Lancaster. The broad discussion focused on understanding what constitutes a strong quality of life in Cambridge, the steps required to achieve it and how it should be measured. Simply measuring economic growth would not be enough and a wider approach that incorporated an examination of infrastructure, devolution and housing would be more successful.

Professor Diane Coyle, openly explained that whilst we "care about economic growth" and "we care about people", a lot of her work is focused around the fact that measuring that progress is currently insufficient.

"People often talk about sustainability as if it's about the environment," she said. "...but it's also social and political, it's about a society that all members are happy to live in, leading a meaningful life, feeling that they have enough control of their own destiny, and I think a lot of the reason that we are in the political mess that we are in, in so many countries, is that there hasn't been enough attention paid to that broad sense of sustainability - it's all been about the headline GDP figures.

"If you are thinking about what makes an economy progress, we do

actually know what the ingredients are. We know that infrastructure and transport and connectivity matter. Skills are critical, enabling people to get good jobs. Health, the quality of housing and where those houses are, amenities, access to nature, and the R&D that gets done, enabling firms to carry on innovating and expanding their markets are all important. The business environment and the quality of management is also key, as is technology. We know all these things matter, but although we've got the ingredients, we don't quite know the recipe or process, and cakes don't self-bake."

As part of her work in Greater Manchester, Professor Coyle was involved in a 'Prosperity Review' – the insights from which highlighted the need for a broader view on economic growth. This should include attention to GDP, further devolution of powers and funding to local areas, and the joining up of employers across the education and skills sectors to ensure access to good jobs and wages. The right infrastructure, she argued, was an essential component to ensuring economic progress.

Planning expert Dr Sue Chadwick then took the helm to explore "quality housing" and how these fit with the notion of quality of life; stressing the importance of recognising the difference between a house and a home. She referenced research by Bruce Alexander, Professor Emeritus,

Simon Fraser University, Canada who gained some fascinating results via his 'Rat Park' study.

"He took a load of rats and got some of them addicted to morphine," said Sue. "He also had two different living environments; one of them a standard laboratory cage very small, nothing to do except eat and drink; and the other a large enclosure with lots of space, places for socialising, places for play and being alone and places to create families." What emerged from the study was that even though both the caged and the large enclosure rats were given the same access to the morphine, those in the large enclosure didn't get addicted, whilst the caged rats did.

"It confirms what we already know about housing," said Sue, "A good quality environment improves the people in it."

These results seemingly reinforce the difference between a house - which is just a physical structure - and a home - which is "something which is more than a shelter." Sue went on to acknowledge the importance of the work currently being undertaken by Cambridge Ahead exploring innovative, creative housing solutions that address the needs of the different groups within our community.

Jo Lancaster introduced public services into the discussion, focusing specifically on an examination of the role of local government and the public sector in general when it comes to the question of quality of life.

"Local government is largely seen as a service provider," she said. "We have service responsibilities that we make to adult social care and education, but the stark reality is that the moment you step out of your front door you are interacting with public services. And some of it is demand driven, so people will present as homeless or needing social care, or their child needs a place in a school, and some of the balance for us is about how we deal with that long-term strategy of dealing with not just electoral the

cycles that our politicians are tied into, but as professional officers, we are on the 20, 30, 40, 50 year time scale of how we manage to shape and develop places."

Jo went on to examine how we build communities instead of simply delivering services to the public and how we create a community that we want to be a part of in the long term and not just as a transient element.

Having heard from all three panellists, David opened the debate to the audience. Architect, Tom Holbrook, called for more of an examination of the physical entity when looking at quality of life in Cambridge.

"Although I fully accept the data, economics, policy are really important," he said, "let's not forget the concrete world that we live in and enjoy...which enables this conversation to turn into something much more particular, less abstract and more focused." Diane responded to this point by calling for us to be conscious of all of the different elements when thinking about the future notion of the city - "the emotional, the social, the intellectual, but also the physical manifestation of it."

Jane Paterson-Todd followed, expressing her interest in finding a way to capture all the different meanings that Cambridge has to people, whilst retaining a collective identity.

Taking on the task of wrapping up the evening's passionate and varied discussions, Dr Cleevely acknowledged the need to understand our primary objectives and define what Cambridge Ahead is aiming for, suggesting that the six objectives touched on by Professor Coyle, or the 'Six

Capitals Approach', as classified by an audience member - to measure natural capital, social capital and intellectual manufacture without relying solely on financial and economic progress - would be a good place to start. Dr Cleevely finished by homing in on three objectives as a result of the discussion, which are:

- To understand the objective - what is it that we are aiming for?
- The need to begin to articulate these objectives without looking exclusively at GDP growth, and;
- To establish a framework from which data must be collected and decide how we make that data available.

From the feedback received from our members, it was a hugely successful evening from which we can now begin our work to fulfil these quality of life objectives from a positive starting position.



Policy Group



Alex Plant
Chair

Following on from the excellent quality of life event described above, the Policy Group is taking a lead in developing an effective framework for this agenda. Maintaining and enhancing quality of life is not a new idea but achieving it as part of a sustainable growth agenda is a hot topic for policy makers right now, with little consensus yet on the right answers. For us to know if we are making a positive impact on the quality of life of people in Greater Cambridge, we need to be able to translate what can be a nebulous concept into something more defined and measurable. This would allow us more readily to influence decision-making at a national and local level so that those decisions enhance

rather than detract from quality of life for existing and new residents and workers. The Policy Group is working closely with others – like the Young Advisory Committee and the Centre for Cities – to develop this framework. Our next steps are to assess what metrics already exist, arrange some focus groups to understand what matters most to different groups, and to use that to inform a subsequent longitudinal survey.

We also remain active in tracking the implementation of the CPIER recommendations, ensuring that the initial impact and momentum created when the Review was published is now maintained into delivery.

Young Advisory Committee



Rob Carter
Chair

In the Young Advisory Committee, we have been relishing our opportunity to explore what the Cambridge Ahead priorities mean for younger generations. I'm delighted that we have received such strong interest from the membership in joining the YAC, and the strong desire there has been from our group in supporting specific work across the other Cambridge Ahead groups.

Our goal with the Committee is that we give a voice to younger people in the debates and decisions which are shaping the next phase of Cambridge's growth. So, our focus to date has been to identify where the immediate opportunities lie to make best use of our collective voice.

High on our agenda right now is the quality of life work and the collection

of underpinning data. At the outset, we want to understand what it is that all people value most in having a good quality of life, and from that we can contribute to the policy work to develop a framework. Our support will continue into the next important stage of undertaking research so that we have a firm benchmark of quality of life in Cambridge today, from which we can understand the impact as the city grows.

We are also inputting to the progressive work within the housing workstream. We are exploring the needs and requirements of younger workers within Cambridge's highly strained housing market. To do this, we are looking into examples from across the world of innovative provision that can meet this intermediate gap in the market.

Growth



The Hon. Matthew Bullock
Chair

Every year Cambridge Ahead works with the University of Cambridge's Centre for Business Research (CBR) to measure global revenue and employment growth of all companies (almost 25,000) based in the Cambridge region.

The most recent data shows that in the year to April 2018, Cambridge-based companies within the Cambridge Ahead area (i.e. within a 20 mile radius of the city) grew their global turnover by 8.7% and their global employment by 4%. Cambridge based companies generate total revenues of £46.6b and employ 233,000 employees worldwide.

These figures represent a fall from the extremely rapid growth seen in 2016, when growth was respectively 15.8% and 8.5%, but they are still high compared to the rest of the UK economy, which saw employment growth of only 1.2% (ONS BRES).

Sectorally, the knowledge intensive (KI) sectors have continued to grow at a steady, high pace with turnover growth of 11.4% and employment growth of 4.8%. The largest KI sectors – IT and telecoms, life sciences and healthcare and high-tech manufacturing, each accounted for over £4.5b turnover. These sectors have shown consistently high turnover growth of around 9% on a three and six year basis, and around 5.5%

employment growth over the same periods. KI sectors now account for 33% of turnover at £15.5b and 26.5% (61,700 staff) in employment.

Turnover and employment growth across this period was particularly strong in IT and telecoms (14.8% and 12.6%). Of particular note in this sector was the employment growth of Aveva as a result of its merger with the division of France-based Schneider Electric. High-tech manufacturing also displayed high turnover growth at 13.7%, while employment actually fell by -0.9%. Life sciences turnover and employment growth was slower at 7.5% and 2.3% respectively, after very rapid growth in 2017 (20.4% and 7.2%).

In other sectors, growth was notably slower than 2017, but still respectable at 7.4% turnover and 3.8% employment growth. Property and finance, wholesale and retail distribution and manufacturing all grew steadily; whereas the most marked change was in construction and utilities, where turnover growth was 4.3% and employment actually fell by 3.5%.

A particularly striking feature of the Greater Cambridge area's economy is the continuing increase in firm size. While there is a broadly stable number – 12,000 to 13,000 – of single person companies, the number of companies employing over 250 employees has risen by 64% to 113 over the last six years, and the strata of medium-sized firms has grown by 39% to 425 companies.

Last year there was clearly a robust economic performance, which has now fallen back, however, even in this prolonged period of uncertainty, Cambridge continues to perform strongly.



Transport



David Braben
Chair



Transport brings together communities, facilitates movement of goods and services, and is essential to the success of the economy.

David Braben

New insights to inform decisions on improving Cambridge's public transport system

Cambridge Ahead has collaborated with the Greater Cambridge Partnership (GCP) to undertake a largescale survey with the public to gather views on options to improve the city's transport system. The responses will be used by GCP to inform decisions on major interventions to raise funding and alleviate congestion, as well guiding future strategy development.

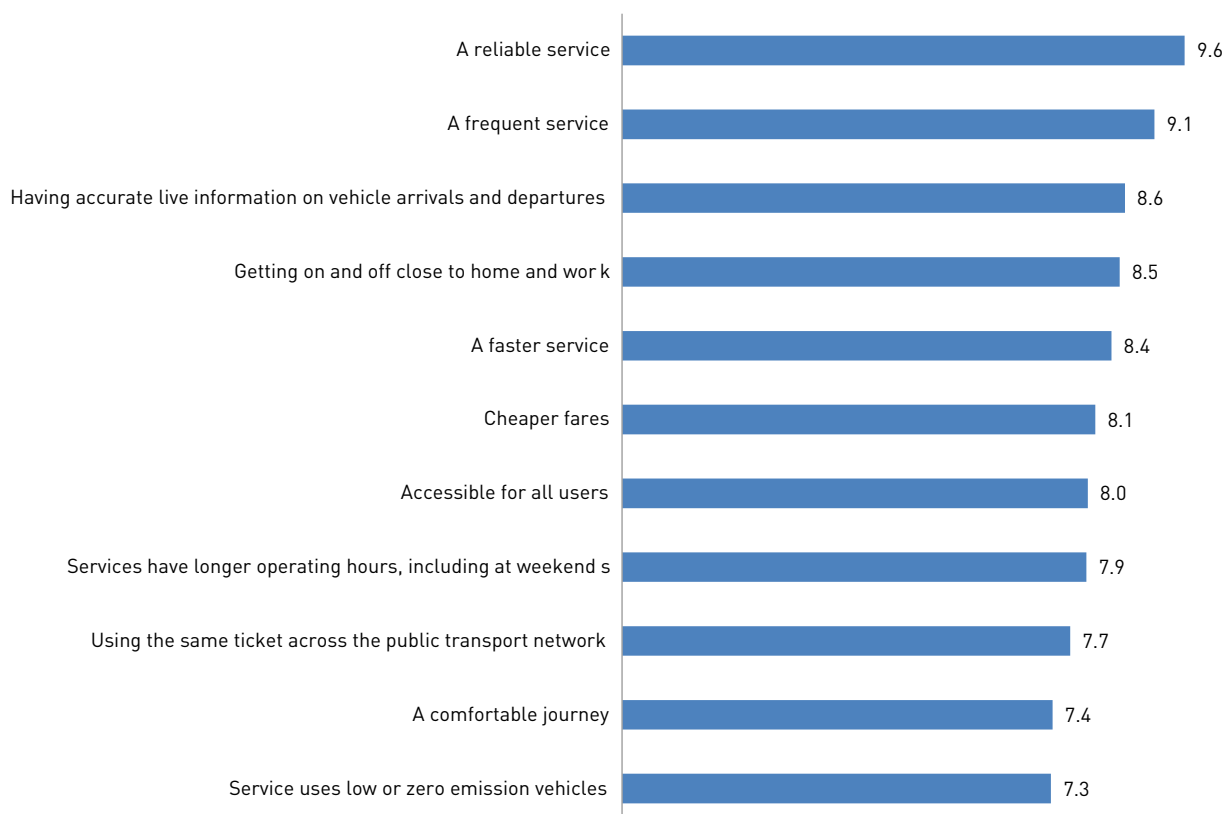
Cambridge Ahead contributed to the development of the survey and promoted it amongst its members. Over 5,100 people responded to the survey, a large proportion of which (65%) were well within working age (24-54). The sample includes both people who make frequent journeys within the city (36% of journeys started in Cambridge) and people who make journeys to the city from surrounding areas.

This survey has provided valuable new evidence and insight, particularly in the headline areas set out below. We will now be working with GCP to analyse the survey data in more depth, so that we can draw out detailed understanding of travel patterns and attitudes of particular demographics.

Travellers to Cambridge prioritise frequency and reliability over other features of public transport, including cost

Respondents were asked to rate the importance of characteristics (on a scale of 1 to 10, with 10 being 'very important' and 1 being 'not important') of an improved transport system. Interestingly, the most important characteristics to people travelling in and around Cambridge are a reliable and frequent service. These were judged to be more important than cost or speed of travel.

Importance of public transport network elements



There are high levels of support for the vision to “build a world class public transport system for Greater Cambridge”

GCP have published this vision that will make it easy to get into, out of, and around Cambridge. Their public transport vision has six goals:

- Offering a genuine alternative to the car
- Rapid, reliable and (where possible) segregated from cars
- An integrated network including timetable, ticketing and information
- Focused on better serving the key employment centres outside of the city centre
- Supporting cleaner air and healthier living
- Affordable and feasible to deliver and sustain

A very large majority of respondents (82%) were supportive or very supportive of this vision. Respondents travelling to work by bicycle and who

used public transport were generally more supportive of the vision, compared to car users travelling to work. Overall, support from all groups was high.

There is strong recognition of the need for policies to reduce congestion and generate funds for public transport, with noticeable support for a pollution charge

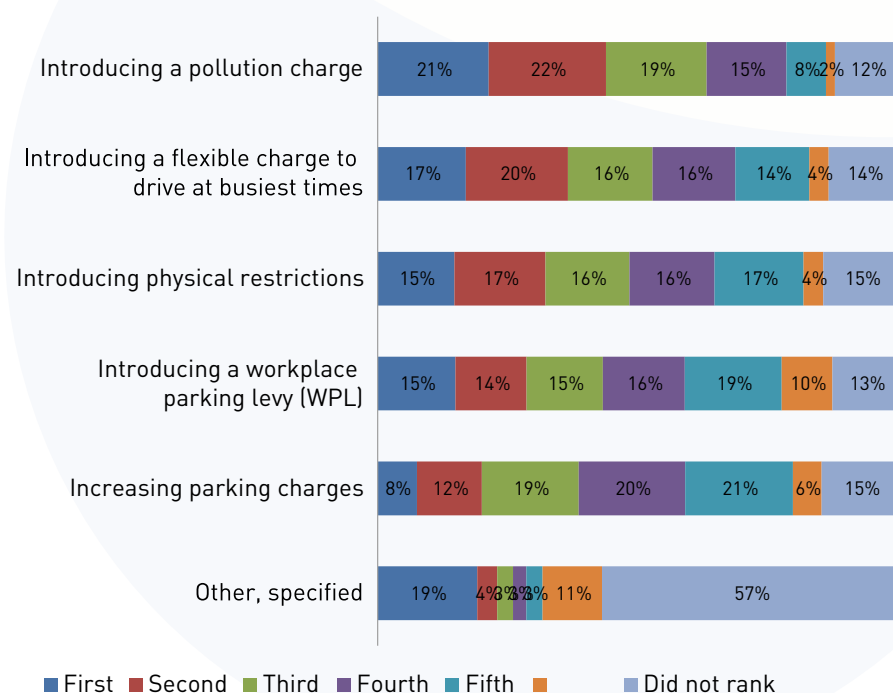
In order to create a world-class public transport network, it was explained that it would be necessary to reduce congestions, pay for improved public transport and improve air quality. Several measures were presented for meeting these goals:

- Introducing parking controls, either by reducing parking availability or increasing charges
- Introducing a workplace parking levy, whereby businesses would be charged about £1000 a year for each staff parking place

- Introducing flexible charging for road use, where motor vehicles would be charged to drive into and around Cambridge and the busiest times
- Introducing a pollution charge, where polluting vehicles would be charged to driver in and around Cambridge
- Introducing physical restrictions on some roads, along with changes in taxation.

Respondents were presented with information on the efficacy of each measure, in terms of the potential to reduce congestion and generate revenue, as well as other positive and negative impacts. Respondents were then asked to rank the measures. Of those who answered (5.5% of people skipped the ranking question), 81 per cent of the proposed options were chosen as people’s first choice. A pollution charge and flexible charging were the most popular ideas, being ranked first or second by 43 per cent and 37 per cent of respondents, respectively. Increasing parking charges was least popular. Nearly a fifth of people provided an ‘other’ option as their first choice, with suggestions including improving public transport services to boost usage and revenues (including extending park and ride services) or utilising existing taxation streams.

The public’s ranking of funding options



Cambridge Ahead’s Transport Group will continue to work closely with GCP and other partners to support the detailed development of options towards implementation.



Housing



Dr Sue Chadwick
Chair



In the summer of 2018, we used the appointment of Dr Sue Chadwick as Chair of the Housing Project to reconsider our purpose and immediate aims.

We reorganised the focus of the Project around three main themes:

- **New Markets:** this asks whether we are making enough space in the housing market for the non-traditional markets such as 'Generation Rent' - which tends to be populations who are 35 or younger - and the diversifying 'tribes' within the over 55 markets;
- **New Tenures:** this seeks to explore practical ways that the market can provide for the new markets - in particular, the young professionals who are ineligible for traditional affordable housing projects and unable to afford market housing in Cambridge and the immediate area, and how the business community could help with a 'meanwhile' housing project.

New Technologies: the fourth industrial revolution is here and is set to change everything. We are rapidly expanding our knowledge in this area and hope to collaborate with Dr Gemma Burgess of Cambridge University in her work on the Digital

Innovation Hub. Highlights of the last year include:

- Meeting the new Youth Advisory Committee and using their insights to focus on the specific needs of this essential component of the Cambridge business community;
- Creating links with the RSA and exploring 'human centred' awareness of the needs of the ageing population through Stephen Hills;
- Promotion of the Meanwhile Living project - a scheme promoted by Allia to develop residential units for members of the homeless population;
- Presentations from Kate Parsley from Digital Built Britain on how technology is likely to transform the way we plan and from Vanessa Hale, Research Director for Strutt and Parker, on the new housing tribes.

The work we have done so far will continue with these themes, but with particular attention paid to two projects that have particular relevance to all of them:

- Development of the City Living intermediate/market product;
- A 'future living' event in late 2019 or early 2020.

Meanwhile Housing: An Allia Project

Cambridge Ahead's housing group has been supporting Allia to develop innovative relocatable modular housing for homeless people. This will add to the City Council's 'Housing First' strategy which is to help people break out of the cycle of homelessness (sometimes called the revolving door of street/hostel/temporary housing) by offering a more permanent roof over their heads. Here, the unit will be available for as long as someone wants it, on the understanding that the location will change from time to time.

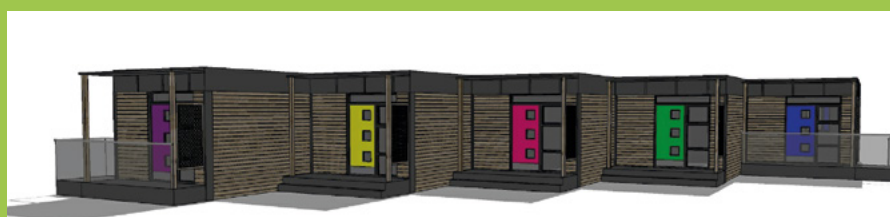
CA members Hill, Brookgate, Howard and Marshall Property have generously offered to sponsor 4 units

- the target is 6. Carter Jonas are assisting with planning and Hill with site preparation. We hope to get the units built by a local social enterprise who train young people in modern methods of construction - and Marshall have offered a hangar for this purpose.

Even temporary (2-5 year) sites are a challenge in Cambridge but the

council, university, developers and churches have been trying hard to identify something suitable. One is being explored with planners and, if we push, we hope to get on site before the winter - which may even save lives.

Martin Clark,
Deputy CEO, Director of Development





Skills



Anne Bailey
Interim Chair

A key pillar in the CPIER report highlights the need for greater skills provision in the county. This followed the Skills Shortage Report produced in 2018 by RAND Europe for Cambridge Ahead and part-funded by the Cambridgeshire and Peterborough Combined Authority.

Research into career provision within our region is vital for businesses and schools to be fully cognisant on what independent career advisory services deliver, where they are making a markable difference and in developing a better understanding of the gaps and overlaps to appropriately address them. When this research is realised, it will take 6 months to complete. We understand there has not been any study on the extent and quality of career provision since 2015. The Government's Careers Strategy (Dec. 2017) and introduction of the Gatsby Career Benchmarks should have brought about changes.

These Benchmarks are a framework of 8 guidelines that define the best careers provision in schools and colleges.

In addition, Members have expressed their concerns around the complexities and rigidity of the apprenticeship levy, which is not delivering the step change in uptake as intended.

We have written to Anne Milton, Minister of State for Skills and Apprenticeships, outlining a number of proposed solutions and prudent adjustments which are necessary for any transformative increase in apprenticeships.

We have urged reconsideration on the time apprentices are expected to train away from the job and flexibility according to the role in consideration. Levy funding should be allocated for backfill posts whilst apprentices are training to maintain productivity. There is also a necessity to ensure approval processes for the various standards are improved so more potential pathways can be offered.

There also requires a higher degree of flexibility on how the levy can be spent across total apprenticeship costs and not restricted to the training element alone. If this funding was broadened to consortiums to deliver apprentices across their industry it would help drive a larger pool of candidates and more business would benefit. There needs to be provision of training to businesses new to the levy and more of the funding should be allocated to training providers to help businesses understand the opportunities available to them. Not least, simplifying the transfer of the levy between businesses so that a greater number of smaller organisations can reap the benefit of an apprenticeship scheme. These adjustments would undoubtedly increase the number and range of apprenticeships across multiple sectors, ensuring the Apprenticeship Levy produces the benefits for which it was intended.



Technology Advisory Group



Faye Holland
Chair

Cambridge Ahead aims to make Cambridge the best, small city in the world. In order to achieve this, we need to ascertain the key business and social needs for technology and digital transformation and how companies can better leverage technology at a business, employee and community level.

Following on from the CPIER and the development of the ICT element of the Local Industrial Strategy, a series of recommendations have been made. The Technology Advisory Group (TAG) has taken these recommendations and started to determine where Cambridge Ahead can best influence, as well as to ensure we include any other business imperatives with regards to technology adoption and prioritisation of trends.

In May, we convened a cross section of businesses and associations in a facilitated workshop to answer two questions - How is technology going to shape your business? And what do you need to realise this?

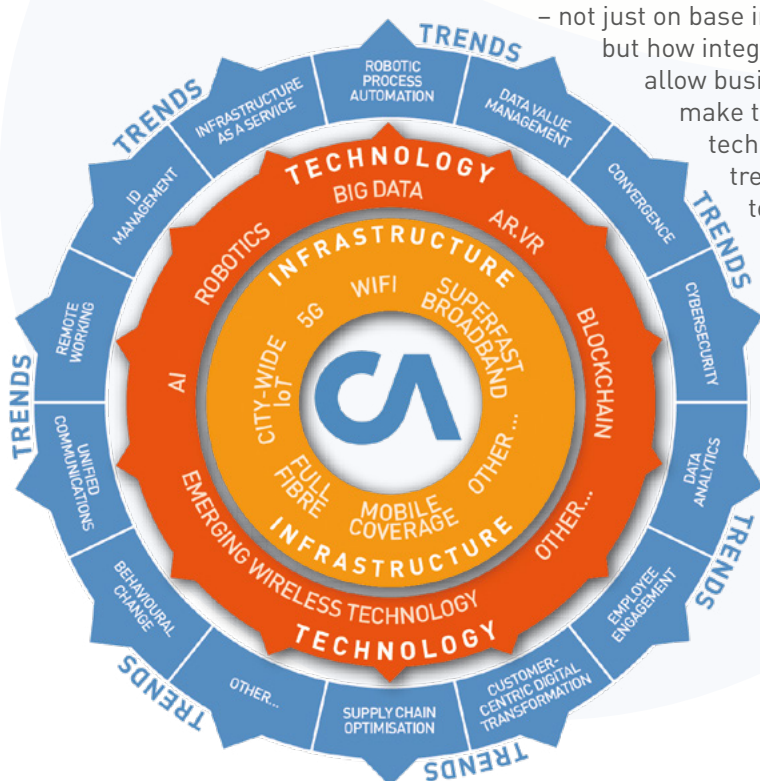
The diagram, below, outlines the sheer scope of impact of technology – not just on base infrastructure but how integral it is to allow businesses to make the most of technologies and trends available to them.

The workshop cut across all three of our key programmes in the Technology Advisory Group: to reflect the technology needs of businesses, enable the application of technology and ultimately improve where we work, live and play using technology.

The outputs of the workshop will shape the group's work in CA's Q3 and Q4 period which will now allow us to develop, test and form a plan for digital infrastructure, technology priorities and trends to ascertain where we can most add influence at either a local, national or government level for the advantage of our local businesses. We would like to thank Cambridge Consultants, arm and RAND Europe for their ongoing support in this programme.

We are also collaborating with the housing group around the Digital Built Britain programme and, as a result of the workshop, should be able to better inform the digital scenario in a broader context than transport.

And finally, with regards to group membership. We are really pleased to welcome involvement from the Young Advisory Committee in the TAG, and we are always interested in broadening inclusion in the group, both from business users as well as technology companies.



Spotlight on our newest members



Volac

Volac is a fast-growing, ambitious international dairy business which is based at Orwell, just outside Cambridge. World leaders in dairy nutrition, their mission is to develop great products that advance the health and performance of consumers and farm animals.

It is Volac's heritage as an innovative family business that inspires them to confront the challenges in our world by working in collaboration with key global partners and influencers. This ambition resonates with the vision of Cambridge Ahead to be a catalyst for action.

Volac cares deeply for their customers and enjoys helping their partners and communities prosper, working together to create a sustainable, healthier future.

"We are delighted to join Cambridge Ahead and play our role in ensuring Cambridge remains a place where business continues to thrive", commented James Neville, Chief Executive Officer of Volac.



Telensa

Telensa makes wireless smart city applications, helping cities around the world save energy, work smarter and deliver more joined-up services for their citizens. Telensa PLANet is the world's most deployed smart streetlight solution, with a footprint of 1.7 million lights across hundreds of cities, including Cambridge.

Building on the compelling business case for its smart streetlighting, the company provides cities and utilities with an open, low-cost platform to add multiple sensor applications. By leading the Urban Data Project alongside Microsoft, Qualcomm, Samsung SDS and Cambridge,

Telensa is helping cities to build future-proof operations driven by data intelligence, trust and transparency. Telensa is based in Pampisford, near Cambridge, and manufactures with Sony in Pencoed, Wales. The company has regional operations in the USA and Australia.

Tim Jackson, Chief Technology Officer and Founder, "As an entrepreneur in the Cambridge area for the last 30 years, I have been part of a unique environment that nurtures technology innovation alongside academic talent. We joined Cambridge Ahead because we want this powerful chemistry to sustain and flourish."

Members at the recent Quality of Life event:
clockwise from top left: Dr David Cleevely CBE and Dr Herman Hauser KBE; Professor Diane Coyle OBE; Alex Joseph and Orestis Tzortzoglou; Nicola Buckley; Harriet Fear MBE; group shot: Alex Joseph, Andy Williams, Duncan McCunn, Paul Schofield and Professor Peter Landshoff.



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