Oxfordshire Futures

Oxfordshire in 2050:
Linking Oxfordshire's development policies and strategies - a briefing note

This draft booklet offers descriptions of key strategies and plans and supporting studies for Oxfordshire's future development that have been prepared or are being prepared. The booklet questions the degree of integration of these strategies and plans, especially concerning the rate, pace and distribution of growth, climate change and funding. The purpose is to facilitate discussion of the strategies and plans in imminent consultations.

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OXFORD
CIVIC SOCIETY
AN INDEPENDENT VOICE FOR OXFORD
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List of abbreviations

AONB	Area of Outstanding Natural Beauty
CDC	Cherwell District Council
CDWA	Cherwell Development Watch Alliance
CPRE	Council for the Protection of Rural England
DLUHC	Department of Levelling Up, Housing and Communities
FEMA	Functional Economic Market Area
FoE	Friends of the Earth
FOP	Future Oxfordshire Partnership
HE	Highways England
IDP	Infrastructure Delivery Plan
IPC	Initial Public Offering
LEP	Local Enterprise Partnership
LIS	Local Industrial Strategy
LTCP	Local Transport and Connectivity Plan
NPPF	National Planning Policy Framework
OCC	Oxford City Council
Oxfordshire CC	Oxfordshire County Council
OCHL	Oxford City Housing Limited
OCS	Oxford Civic Society
OGB	Oxfordshire Growth Board (now Future Oxfordshire Partnership)
OIEP	Oxfordshire Inclusive Economy Partnership
ONS	Office for National Statistics
OSP	Oxford Strategic Partnership
OXIS	Oxfordshire Infrastructure Strategy
OP2050	Oxfordshire 2050 Plan
Oxon CC	Oxfordshire County Council
PPG	Planning Practice Guidance
SODC	South Oxfordshire District Council
VC	Venture Capital
VoWH	Vale of White Horse District Council
WODC	West Oxfordshire District Council

Please note that particularly important points are highlighted in bold in the following text

1. INTRODUCTION – the purpose of this booklet

1. Within months of this Oxford Civic Society booklet being published, decisions will be made about the scale, pace, distribution and sustainability of further growth in Oxfordshire. To date there is no one document which describes the various plans and strategies which have been prepared and are being prepared which should contribute to, and benefit from, the decision making. Several of the key plans and strategies, and associated studies, are the focus of this booklet:

- **Oxfordshire Vision** - the Strategic Vision for Oxfordshire establishes an ambition which is shared by all the Oxfordshire local authority councils. The intention is that the Vision will be used as an agreed set of long-term, strategic economic, infrastructure and environmental priorities to guide the design of the Vision's outcomes that local people want. Key strategies and plans to achieve the Vision include:
    - **Oxfordshire Local Industrial Strategy** - the Local Industrial Strategy was a requirement of central government and was published in 2019[1]. The Strategy sets out an ambitious vision for the region to be one of the top three global innovation ecosystems by 2040.
    - **The current Local Plans** of the District and City Councils
    - **Draft Oxfordshire 2050 Plan** - the Plan is intended to set out the long-term, overarching and high-level spatial planning framework for Oxfordshire for the period to 2050. This includes establishing the scale, pace and distribution of employment and housing growth. The Plan is supported by the contentious Oxfordshire Growth Needs Assessment.
    - **Oxfordshire Infrastructure Strategy (Stage 1 and draft Stage 2)** - the Strategy aims to ensure adequate infrastructure and service provision, including to employment and housing growth, to 2040 and to 2050;
    - **Draft Local Transport and Connectivity Plan** – the Plan aims to reduce car trips and achieve a net zero carbon transport system in the county by 2040, addressing the challenge of employment and housing growth.

2. **Oxford Civic Society is concerned that these strategies and plans are not as integrated as they need to be.** The Society hopes that the unification of the presentation of these various plans and strategies in one document will demonstrate the need for integration and will be helpful to decision makers and to those who are interested in participating in the decision making. The booklet is aimed at county, district, city and parish councillors and at businesses, special interest groups, community organisations, residents and those who may not live in Oxfordshire, but who work or play here and who have concerns about the future of the county.

3. Drawing directly[2] from the published draft plans and strategies, the following **Section 2** and associated Annexes describes '*where we are now'.* Section 2.1 describes the Oxfordshire Vision and Section 2.2 describes the strategy and plans which have already been approved – the Local Industrial Strategy and the district and city current Local Plans. Section 2.3 completes Section 2 with descriptions of the key plans still being prepared – the Local Plan updates, Oxfordshire 2050 Plan, Oxfordshire Infrastructure Strategy and Local Transport and Connectivity Plan. Other relevant plans and strategies are described briefly. Section 3 highlights key areas where integration is necessary (Section 3.1) and Section 3.2 suggests ways of integrating the strategies and plans and continuing the process of strategic plan making in a more integrated way.

[1] Oxfordshire Local Industrial Strategy: A Partner in the Oxford-Cambridge Arc, July 2019. Oxfordshire Local Enterprise Partnership, also published as a Policy Paper of the Department of Business, Energy and Industrial Strategy and the Ministry of Housing, Communities and Local Government, July 2019
[2] Citations are provided to acknowledge sources

2. WHERE WE ARE NOW

Section 2.1 notes the strong links between national and local development policy which has to be borne in mind when considering the way in which Oxfordshire development policy is formulated. Section 2.2 describes the expected outcomes of the Oxfordshire Vision and its definition of 'good growth (which is presented in more detail in Annex 1).' The plans and strategies prepared or being prepared to achieve the Vision's outcomes and 'good growth' are described in Sections 2.3 and 2.4.

2.1. Linked national and local development policy

4. It is commonly understood that English development planning and management is highly centralised. It is not possible to describe development planning in Oxfordshire without reference to the abundant policy measures established at national level. The interaction of national and local is described graphically in Annex 4 and referred to wherever relevant in the following text.

2.2. The Oxfordshire Vision

5. At the end of 2020, the Future Oxfordshire Partnership[3] undertook a public engagement exercise asking for public feedback on a Draft Strategic Vision for Oxfordshire. Following consideration of the responses received, a revised draft was endorsed by the Partnership on 22 March 2021[4]. This draft was then approved by each of Oxfordshire's councils.

6. **The Strategic Vision for Oxfordshire[5] establishes a common and shared ambition to guide the focus of Oxfordshire's plans, strategies and investment programmes. The intention is that the Vision will be used to help create an agreed set of long-term, strategic economic, infrastructure and environmental priorities designed to deliver the outcomes that local people want.**

2.2.1. Expected outcomes of the Vision

7. By 2050 Oxfordshire will:

- **Be a globally competitive economy** which is sustainable, diverse and inclusive, generating high-quality, productive and knowledge-based employment for our communities. It will utilise the county's strengths and resources, including its world-class universities and world-leading research, innovation and technology assets. There will be improved educational attainment and a skills system aligned to the needs of business and communities, helping to provide the conditions in which all Oxfordshire's people can benefit and thrive.
- **Have transformed movement and connectivity** within the County and beyond. There will be greater digital connectivity and physical mobility in and between places in ways that enhance environmental, social and economic wellbeing, with an emphasis on sustainable travel, including walking and cycling.
- **Be the first generation to leave the natural environment in a better state than that in which we found it.** The natural environment will be more biodiverse, support social, economic and ecological resilience and have the capacity to adapt to change.

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[3] The Future Oxfordshire Partnership is a joint committee of the six councils of Oxfordshire together with key strategic partners. Following an extensive public review in 2020, the Partnership has a new purpose to: (i) coordinate local efforts to manage economic, housing and infrastructure development in a way that is inclusive and maximises local social and environmental benefits; (ii) support the development of local planning policy that meets the UK Government's stated aim of net zero carbon by 2050, and contributes towards biodiversity gain whilst embracing the changes needed for a low carbon world; and (iii) seek to secure funding in the pursuit of these aims and oversee the delivery of related work programmes delegated to it by the joint committee's constituent local authority members.

[4] The Vision is very welcome – but it did arrive a little late, after the Local Industrial Strategy approval, for example, and after work had started on the Oxfordshire 2050 Plan, Oxford Infrastructure Strategy and Local Transport and Connectivity Plan and supporting studies.

[5] Details of the Vision can be found on this link (ignore spelling mistake): Oxfordshire's Strategic Vision for Long-Term Sustainable Development (futureoxfordshirepartnership.org)

- **Have flourishing, diverse and vibrant communities** rooted in pride with our local, national and international connections and a strong sense of civic identity. Individuals and families will support each other in partnership with sustainable public services, a thriving voluntary and community sector and be connected to dynamic and socially responsible businesses.
- **Have a healthier and happier population with better physical and mental health**. Young people will feel confident, positive and excited about their future and people will spend more of their later life active, in good health and with care available in their communities to meet their changing needs.
- **Have energy efficient, well-designed homes, sufficient in numbers, location, type, size, tenure and affordability** to meet the needs of our growing economy, young people, residents and future generations.
- **Enjoy a built and historic environment** which is rich and diverse, comprising high-quality places where people want to live, work, visit and invest. Our rich and distinctive internationally recognised heritage assets, visitor economy and vibrant cultural offer will have been further enhanced and there will be improved access to them.
- **Be a more equal place, supported by inclusive growth** that gives everyone a fair chance in life to prosper. Deprivation and disadvantage will have been tackled wherever it manifests itself in our urban and rural areas, and discrimination will have been removed.
- **Have achieved carbon neutral status, and be accelerating towards a carbon negative future**, and be accelerating towards a carbon negative future, removing more carbon than it emits each year. Energy production will be sustainable.

2.2.2. Good Growth

8. **The Future Oxfordshire Partnership's definition of 'good growth' forms the basis for a set of guiding principles for future development. It is very welcome that the Vision for Oxfordshire includes this section on good growth: for some in Oxfordshire any growth is bad, but for many others there is no objection to growth if it is 'good' growth. This is the view taken by the Oxford Civic Society. We ask the question 'is the proposed growth justifiable equally on economic, environmental and social grounds.' The Future Oxfordshire Partnership's definition of good growth is set out in Annex 1.**

9. **Taken together, the outcomes, definition of 'good growth' and guiding principles form the foundation for the overarching approach to long-term sustainable development for Oxfordshire, and for developing plans, strategies and investment programmes. This should be kept in mind when reading the rest of this booklet.**

2.3. Existing strategy and plans

Section 2.2 describes the key strategy and plans which have already been approved – the Local Industrial Strategy and the district and city Local Plans.

2.3.1. Local Industrial Strategy

The purpose and scope of the Local Industrial Strategy

10. Launched in 2019, (after the adoption of all the current District Local Plans and the current Oxford City Local Plan), the Oxfordshire Local Industrial Strategy sets out an ambition for the region to be one of the top three global innovation ecosystems by 2040. Published jointly with the Government in July 2019, the strategy is a powerful statement of Oxfordshire's leadership role in the UK's economy, and the responsibility it holds in driving forward the nation's success on the global stage[6].

[6] Oxfordshire Local Industrial Strategy: A Partner in the Oxford-Cambridge Arc, July 2019. Oxfordshire Local Enterprise Partnership, also published as a Policy Paper of the Department of Business, Energy and Industrial Strategy and the Ministry of Housing, Communities and Local Government, July 2019

11. The Local Industrial Strategy was prepared by the Oxfordshire Local Enterprise Partnership and responded to the UK's 2017 Industrial Strategy[7], government's long-term plan to boost productivity by investing in skills, industries and infrastructure. It was anticipated that growth will be driven by innovation and higher productivity - both in emerging sectors which would harness transformative technologies, and in sectors that have historically driven the local economy. It aimed to be inclusive, place-sensitive and sustainable, responding to increasing concerns around climate change, and it was intended to enhance the natural environment and the quality of life for everyone in Oxfordshire.

12. **The Strategy is important as it underpins the Oxfordshire 2050 Plan, Oxford Infrastructure Strategy, Local Transport and Connectivity Plan and updates to the District and City Local Plans. In particular it underpins the most ambitious of the three growth options of the Oxfordshire Growth Needs Assessment[8], determining the scale, pace and extent of employment and housing growth.**

The Oxfordshire Local Industrial Strategy – The Investment Plan

13. In August 2020 the next stage of the Local Industrial Strategy was published, the Oxfordshire Investment Plan[9]. This Investment Plan takes forward the ambitions set out in the Local Industrial Strategy, translating its policy ideas and commitments into a programme for action and delivery. The Investment Plan also responds to the economic challenges which the pandemic created for businesses, supply chains and the workforce, and the need to build an inclusive economy for all communities. The climate change emergency and the need to foster clean growth are additional key imperatives to which this Plan responds.

14. This Plan encompasses a programme of activity for the next ten years, initially to 2030, with further longer-term projects in development for the period on to 2040. By 2030, the portfolio aims to deliver at least 24,500 new jobs (gross full-time equivalents), 344,400m2 of new commercial and innovation floorspace, 29,400 new homes.[10] All these targets can be accommodated in the current Local Plans, assuming the continued distribution of growth between the committed Local Plans.

15. **The Investment Plan identifies critical packages of enabling infrastructure which will be implemented within the Investment Plan. These infrastructure schemes include strategic rail projects, required to meet service enhancements identified in the Oxfordshire Rail Corridor Study; a programme of enhanced digital connectivity across the County, as outlined in the Oxfordshire Digital Strategy and Work Programme; energy requirements set out in the Oxfordshire Energy Strategy; and emerging infrastructure programmes focused on carbon reduction and enhancing green infrastructure and corridors. These enabling infrastructure initiatives are included in the Oxfordshire Infrastructure Strategy, described in Section 2.4.3.**

16. **The longer-term growth implications of the Local Industrial Strategy will need to be aligned with the growth implications of other matters (including climate change, environmental management, inclusivity, infrastructure capacity, public and private funding availability and institutional capacity to manage growth).**

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[7] Please refer to Annex 4 which describes the links between national and local development policy (available on request from Oxford Civic Society)
[8] Please refer to Section 3.1.1 below
[9] The Investment Plan Oxfordshire's Local Industrial Strategy, HM Government and Oxfordshire Local Enterprise Partnership, August 2020
[10] Part of the committed new homes to be delivered by 2031 as agreed in the Oxfordshire Housing and Growth Deal and which are recognised in Local Plans

2.3.2. Oxfordshire's Local Plans

17. Currently there are Local Plans for all District Councils and the City Council in Oxfordshire, as shown in Table 1. It is understood that the Local Plans are being updated and to extend their periods of effectivity to 2040. Synchronizing the Local Plans in this way will be very helpful.

Table 1: Current District and City Local Plans

District Local Plan	Adoption Date	Timeframe
Cherwell Local Plan (Part 1) 2011-2031	July 2015 (re-adopted December 2016	2011-2031
Cherwell Local Plan (Part 2) 2011-2031 Partial Review	September 2020	2011-2031
Oxford Local Plan 2016-2036	June 2020	2016-2036
South Oxfordshire Local Plan 2035	December 2020	2011-2035
Vale of White Horse Local Plan 2031 (Part 1)	December 2016	2011-2031
Vale of White Horse Local Plan 2031 (Part 2)	October 2019	2011-2031
West Oxfordshire Local Plan 2031	September 2018	2011-2031

Source: District and City Councils

18. **The current Local Plans identify agreed and legally binding employment and housing land-use targets up to the end of the periods of each Local Plan's effectivity. This means that plans for the scale, pace and distribution of employment and housing growth are already fixed until: (i) 2031 (in the Districts of Cherwell, Vale of White Horse and West Oxfordshire; (ii) 2035 (in South Oxfordshire District); and (iii) 2036 (the City of Oxford).**

Employment and the Local Plans

19. Over 500 hectares of strategic employment space is allocated within the various District Local Plans. As indicated in Table 3 in Annex 2, most of the space is split across Cherwell and the Vale of White Horse. The growth in the Vale of White Horse is associated with several key strategic sites in the Science Vale including Harwell Campus, Milton Park and the former Didcot Power Station. Notable employment sites are also allocated around Bicester and in several mixed-use communities, including the Salt Cross Garden Village in Eynsham.

20. The Oxfordshire Growth Needs Assessment[11] (please refer to Section 3.1.1) informing the Oxfordshire Plan 2050, is intended to provide further clarity in relation to what the future job creation trajectory might be during the period of the Local Plans and beyond to 2040.

21. However, the still ongoing pandemic presents a series of unprecedented challenges to forecasting future employment trajectories. For example, there is uncertainty in relation to what the long-term impacts that the transition to remote working in service sectors of Oxfordshire's economy will be, particularly how it impacts the relationship between the amount of proposed employment floorspace, and the number of jobs created.

22. Whilst the OxLEP Economic Recovery Plan[12] forecasts that Oxfordshire could have around 6,000 fewer jobs by 2031 (relative to a pre-pandemic trajectory), it identifies that there is likely to be continued strong demand for the Research and Development floorspace property market[13].

23. **Based on information from the various Annual Monitoring Reports across the county, most of the allocated strategic employment sites in the District Local Plans are still to be delivered during the Local Plan periods. Whilst the impacts of the pandemic on the delivery of these sites**

[11] Oxfordshire Councils Growth Needs Assessment: Executive Summary, Phase 1 Report, Phase 2 Report, Covid Addendum, July 2021 (Iceni, JG Consulting and Cambridge Econometrics).
[12] Oxfordshire's Economic Recovery Plan: The ERP Action Plan, OxLEP, 2021
[13] This finding should be included in the recommended review of the OGNA

remains unknown, a summary of allocated floorspace yet to be delivered by OxIS Towns and Surrounds and OxIS Rural Communities is provided in Table 4, Annex 2. This indicates that most allocated strategic employment floorspace still to be delivered is in Oxford, Didcot and Wallingford, and Bicester.

Housing and the Local Plans

24. Table 5 in Annex 4 shows the key housing distribution policies of the current Local Plans and the extent of planned housing provision (the numbers of houses). Table 6 in Annex shows housing completions achieved in the period between 2011/12 – 2019/20 in the Districts of Cherwell, South Oxfordshire, Vale of White Horse and West Oxfordshire, and the Housing that still needs to be completed (to meet Local Plan allocations) between 2020 and 2031. Table 6 also shows Oxford City housing completions 2016/7 to 2019/20 and the housing numbers that need to be achieved between 2020 and 2036.

25. **It is noticeable that the housing provision in the Cherwell and Vale of White Horse Local Plans does not appear to be linked to the employment land provision in those Districts (212 ha and 194 ha respectively). If the employment land is taken up and assuming 'normal' occupancy rates, the mismatch between employment and housing provision could have commuting and housing affordability implications (please refer to the observations made in the Oxfordshire Growth Needs Assessment on this in Section 3.1.1).**

26. **To achieve the housing provision specified in the Local Plans, the completion rates need to accelerate significantly between now and the end dates of each Local Plan period. The biggest challenge will be in South Oxfordshire which will need to increase the annual rate of completions by a factor of 2.6. West Oxfordshire also has a challenge needing to increase its annual completion rate by a factor of 2.15. For the other Local Plans, the factors are Cherwell 1.86, Vale of White Horse 1.23 and Oxford City Council 1.12[14].**

27. If completion rates continue at the pace achieved from 2011 to now, an average rate of only 3,721 p.a. will be achieved. To complete the Local Plan housing provision in the Local Plans within the Local Plan planning periods an average completion rate of 6,645 pa will be required between now and the end of each Local Plan period[15]. **Clearly previous targets were over-ambitious and the underlying constraints to housing completions need to be fully understood in setting targets in the updated Local Plans and the Oxfordshire 2050 Plan.**

The status of the Local Plans

28. **As noted above, currently there are Local Plans for all District Councils and the City Council in Oxfordshire, as shown in Table 1. It is understood that the Local Plans are being updated and to extend their periods of effectivity to 2040. At the time of writing (June / early July 2022) the schedule for the completion of the Oxfordshire Plan 2050 is unclear, other than that the government has agreed to extend the period of preparation – possibly to approval in 2024. Although this is good from the point of view of having more time than we thought for bringing together the various strategies, plans and studies so that they are complementary and cohesive, it poses a problem for the Local Plan updates, some of which have started already. It means that the**

[14] A review of the initial results of the 2021 census suggest that the Oxfordshire Growth Needs Assessment (OGNA) (see Section 3.1.1) underestimates the 2018 base population in Oxford, Cherwell, South Oxfordshire and West Oxfordshire (by calculation of the average annual rate of population growth 2011-2021 and applying that rate of growth to 2011-2018). The overall discrepancy for the county as a whole is about 15,276 i.e., the OGNA underestimated population growth in the county to that extent.

[15] Calculations by Oxford Civic Society based on statistics made available by the District and City Councils

updates will be prepared without the benefit of the strategic planning framework which the Oxfordshire 2050 Plan was intended to provide. For example, as it stands at the time of writing, this means that the updates will not be working with a common and agreed scale, pace and distribution of employment and housing growth in the county.

Stakeholder engagement

29. The Local Plans have benefited from the statutorily required process of public engagement.

2.4. Strategies and plans in preparation

Section 2.4 provides descriptions of selected key plans still being prepared – the Oxfordshire 2050 Plan, Oxfordshire Infrastructure Strategy and Local Transport and Connectivity Plan. Other relevant plans and strategies are described briefly.

2.4.1. The Oxfordshire 2050 Spatial Plan

The purpose and scope of the Plan

30. As part of the Housing and Growth Deal[16] agreement with government, all Oxfordshire's local authorities have committed to producing a joint statutory spatial plan (JSSP)[17], known as the Oxfordshire Plan 2050[18]. Once adopted, the Plan will form part of the Development Plan for Oxford City Council and each District Council in Oxfordshire. The document will be submitted to the Planning Inspectorate for independent examination before going in front of each council, which will consider voting to adopt the Plan.

31. The Oxfordshire 2050 Plan is intended to set out the long-term, overarching and high-level spatial planning framework for Oxfordshire for the period to 2050. It will be used by the Districts and the City in the formulation of more detailed Local Plans and Neighbourhood Plans and, where appropriate, its policies will carry weight in the determination of planning applications and appeals for development. It will also provide a spatial framework for a wide range of other plans, strategies and programmes relevant to Oxfordshire that have a bearing on the use of land[19].

32. The Plan will only contain policies that are appropriate to its overarching role as part of Oxfordshire's portfolio approach to plan-making and strategy development. It will not, for example, include policies that are more appropriately made in Local or Neighbourhood Plans, and its policies will add value by being Oxfordshire-specific and not simply replicating national policy.

The spatial options and draft policies

Policy themes

33. The Oxfordshire 2050 Plan is being prepared based around five key themes:

- **Addressing climate change** This theme includes policy options on sustainable design and construction, energy, water efficiency and flood risk. Collectively, these policies will help to reduce carbon emissions in

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[16] On 22 November 2017 the government announced that Oxfordshire would receive up to £215 million of new funding to support their ambition to plan for and support the delivery of 100,000 homes by 2031, alongside a commitment to adopt an Oxfordshire-wide statutory joint plan by 2021. https://www.gov.uk/government/publications/oxfordshire-housing-deal

[17] It is a formal Development Plan Document being prepared under Section 28 of the Planning and Compulsory Purchase Act 2004 (as amended).

[18] It is ironic that central government requires special arrangements to be made for this Plan, having dismantled the earlier planning system of County Structure Plans supported by regional development bodies. **Clearly strategic planning of this sort is required after all.**

[19] It was also intended that the Oxfordshire Plan would play an important role in helping shape the emerging Spatial Framework for the Oxford-Cambridge Arc, but as central government leadership of the Arc Strategy has faltered, the future of the Arc Strategy is uncertain. An assessment of the value of the Arc to Oxfordshire would be a useful component of the Oxfordshire 2050 Plan.

Oxfordshire, encourage a shift to sustainable energy, help prepare for future weather events (flooding), and ensure an efficient use of energy and water.
- **Improving environmental quality** This theme includes policy options that collectively aim to protect and enhance Oxfordshire's natural, historic and built environments. Policy options in this theme include those relating to air quality, water quality, biodiversity net gain, nature recovery, natural capital, ecosystem services, and more.
- **Creating strong and healthy communities** This theme presents a range of policy options that will help to build communities that are strong, healthy and inclusive. Policy options in this area will help ensure that new development in Oxfordshire considers and supports our physical and mental wellbeing. Other policy options in this theme relate to high quality design, health infrastructure, leisure, recreation, open sports and community facilities.
- **Planning** for sustainable travel and connectivity This theme aims to reduce carbon emissions from transport in Oxfordshire. It supports sustainable travel choices, including measures to encourage walking and cycling and the use of public transport. It seeks to reduce the need to travel, especially by car. It also aims to support the delivery of new strategic infrastructure and looks to ensure communities are digitally connected. Key policy options in this area include those on digital infrastructure, sustainable transport and freight management, strategic infrastructure, and a specific policy that focuses on a movement towards a transport network where no carbon emissions are produced in Oxfordshire.
- **Creating jobs and providing homes** This theme includes a variety of policy options that will help to provide a range of homes (including affordable homes) to meet Oxfordshire's needs, as well policy options that will provide better access to jobs and support Oxfordshire's economy. Policy options in this area include those on urban and town centre renewal, skills and education, affordable homes, specialist housing, as well as tourism, culture and arts, and more.

Spatial distribution of development

Spatial Scenario Typologies, February 2019

- Scenario 1: Intensification of city, town and district centres
- Scenario 2: New settlements
- Scenario 3: Dispersal with development spread evenly across the county, including in smaller settlements
- Scenario 4: 'Wheel' settlement cluster with a focus on Oxford and the existing larger towns and key corridors into Oxford and between towns
- Scenario 5: Intensification around the edges of larger settlements and strategic extensions
- Scenario 6: Spokes and hubs with a continued focus on Oxford and key corridors into Oxford
- Scenario 7: 'String' settlement/ settlement cluster with development focused on a number of linked settlements.

34. These typologies were further refined following public consultation to inform the following set of eight potential alternatives for the spatial distribution of growth for consideration through the Sustainability Appraisal of the Oxfordshire Plan.

Spatial Alternatives, July 2020[20]

1. Intensification in existing towns and cities: Increase density of existing and planned settlements, prioritise brownfield sites.
2. Intensification of housing development around strategic economic assets: Co-location of uses to meet business and research park needs.
3. Public transport 'Wheel' (transport-led): Concentrate development around areas of good public transport connectivity.
4. Rail 'String' (transport-led): Locate string of settlements along new/upgraded rail corridors (e.g., Cowley line).
5. OxCam 'String' (transport-led): New development along route of OxCam Expressway, once the route has been decided, consistent with NIC Growth Deal aspirations.

[20] Oxfordshire Plan 2050, Sustainability Appraisal – Alternatives, LUC in association with Levett-Therivel Sustainability Consultants, July 2020

6. Strategic road junctions: Concentrate development around strategic road junctions.
7. Proportionate dispersed growth between existing settlements (needs-led): Oxford, towns and villages.
8. New settlements with new strategic transport connections.
9. Protect environmental assets (environment-led): Identify environmental constraints first (eg. strategic green and blue infrastructure, historic environment, flooding, AONB and other sensitive landscapes, best and most versatile agricultural land etc, possibly through natural capital mapping), then place housing and employment where they avoid significant impacts and enable enhancements.

35. Alternatives 5 and 6 which would focus development on roads (the Oxford-Cambridge expressway for Alternative 5 and existing road junctions for Alternative 6) were the least sustainable alternatives of the nine considered through the Sustainability Appraisal. The expressway was formally cancelled by Government in March 2021 after analysis showed that the proposed project would not be cost-effective, with any benefits outweighed by the costs.

36. Alternative 5 is no longer considered 'reasonable' and it has been discounted from further consideration. Alternative 6 was assessed as having significant negative effects across a range of SA objectives, including health, reliance on the car, climate change, pollution, soils and efficient use of land, biodiversity and geodiversity and landscape. This alternative is also not considered 'reasonable' and none of the spatial options put forward at this stage focuses development on roads.

37. Alternative 8 (new settlements with new strategic transport connections) was assessed as having a mix of positive and negative effects, depending on the scale of new settlements, their location and the type of strategic transport connections created. New settlements have not been taken forward as a separate strategic spatial option in the Plan; rather a new settlement (or settlements) is considered as a spatial typology that could potentially help deliver several of the strategic options set out in this document.

38. It is noted in the Oxfordshire 2050 reports that it was not the intention at earlier stages of Plan preparation to identify individual spatial strategy options that can necessarily accommodate all of Oxfordshire's growth over the next 30 years. Nor is any one of the options, taken in isolation, likely to form Oxfordshire's eventual long-term spatial strategy. **It is much more likely that the preferred strategy in the Regulation 19 Plan will comprise components from more than one of the options which, when combined together and depending on how robust the potential interventions are likely to be, will most effectively deliver the Plan's priorities and the outcomes set out in the Strategic Vision for Oxfordshire. <u>However, the options are very difficult to evaluate without knowing the extent of the development growth to be accommodated.</u>**

39. Criteria have been identified to evaluate the options and the intention has been to introduce criteria which are consistent with the Oxfordshire Vision:

- Guiding new development to the most sustainable locations.
- Using land effectively by planning positively for brownfield land and supporting urban regeneration.
- Protection and enhancement of Oxfordshire's highly valued countryside and landscape.
- Enhancement of the network of green spaces and blue infrastructure in urban and rural areas in ways that deliver social, economic and environmental benefits.
- Support for nature's recovery in ways that optimise the range of economic and social benefits that nature provides.
- Creation of places that build community resilience in terms of climate change, health of habitats and healthy place-shaping.
- Maintenance of an effective Green Belt around Oxford and enhancement of its beneficial use in line with national policy.
- Planning for growth opportunities that will reduce inequalities and improve the health and wellbeing of the most disadvantaged.
- Strengthening the conditions that support our network for economic activity comprising innovation hubs and clusters and corridors based on science and technology and other key economic assets.

- Reducing the need to travel and improving connectivity, with new development located where there is existing or planned sustainable transport links (or the potential for such links based on new investment) and the potential for active travel.
- Planning for further development at existing settlements where this can be done sustainably.

The current status of the Oxfordshire 2050 Plan

40. **Following the consultation on the Regulation 18 Plan, a site options assessment is planned to be undertaken using a series of steps to enable the 'Broad Areas of Growth' to be identified, taking account of current local plan allocations, new development proposals and opportunities for enhancement. A decision will also be taken as to where on the OGNA range the level of growth to be accommodated should be set (including, it is hoped, a review of the assumptions and data underpinning the OGNA). This will take account of the level of 'committed' growth already met in the five adopted local plans from 2020 to 2031/5/6 onwards and thus consider a 'residual growth' figure for the 2031/5/6 period to 2050. The conclusion of these steps will inform the 'broad locations of growth' that will be presented for consultation in the Regulation 19 Draft Oxfordshire Plan.**

At the time of writing the original version of this report, it was expected that the Regulation 19 consultation (the final public consultation before the submission of the Plan to the Planning Inspectorate) would be in September, hence the urgency for this report. However, it is now understood (as noted above) that an agreement has been reached with government to extend the period of preparation of the Oxfordshire 2050 Plan, with approval expected in 2024. This extension of the preparation time of the Oxfordshire 2050 Plan is very welcome as it increases the possibility that some of the strategies, plans and studies noted in the report can be better integrated with each other[21].

Stakeholder engagement

41. The Plan is also being shaped by public and stakeholder engagement. An initial formal Regulation 18 Part 1 consultation 'Introducing the Oxfordshire Plan' took place in February / March 2019. That consultation sought views on what the Plan's vision, aspirations, objectives and broad spatial strategy should be. The public's response to that consultation is set out in the Regulation 18 Part 1 **consultation report**[22]. Taken together, the responses gave a very clear overall steer that there is an appetite for an approach that: is ambitious, radical, innovative and creative; is Oxfordshire-specific and reflective of local people's views; prioritises climate change, and focusses on social, economic and environmental wellbeing, and not solely on a narrow definition of growth.

2.4.2. The County Council Local Transport and Connectivity Plan

The purpose and scope of the Plan

42. Local Transport Plans are statutory documents, required under the Transport Act 2008. The current update of the Oxfordshire transport plan is called the Local Transport and Connectivity Plan (LTCP), to better reflect the strategy both for digital infrastructure and for connecting the whole county. The LTCP covers the time period to 2050 and is in two parts. Part 1 outlines the long-term vision for transport in the county and the policies required to deliver this. Part 2 (to be prepared over the coming year) considers the local application of these policies in the form of a series of area and corridor strategies.

[21] It is also possible that there will be a re-run of the Regulation 18 consultation, presumably with alternative scale, rate and distribution of growth options.
[22] https://oxfordshireplan.org/wp-content/uploads/2019/06/Reg-18-Part-1-Consultation-Summary.pdf

43. At the national level there are a range of policies that provide context for the LTCP. At the sub-national and regional levels Oxfordshire County Council is also a part of regional bodies and partnerships which outline further aspirations for the region: These are set out in Annex 4 (available on request).

44. **The LTCP needs to reflect changes to policy and funding and account for new priorities such as decarbonisation. The LTCP also represents an opportunity to adopt and implement a new way of thinking which considers people first and seeks to create healthy places whilst improving biodiversity and air quality**. The challenges identified are:

- **Decarbonisation** – Delivering a zero-carbon transport system is a critical part of contributing to UK targets and addressing climate change.
- **The private car** – A 36% increase in car vehicle miles since 1993 is having negative impacts on human health and the environment.
- **Future growth** – Proposals for many new jobs and homes in the county will have a significant impact on our transport network.
- **Connectivity** – There is a need to improve connectivity by all transport modes and also other forms of connectivity such as digital.
- **Wider challenges** – Transport is also critical to addressing wider challenges, notably public health, inequalities, air quality, and safety.

45. There are five proposed key themes and associated 'outcomes'

- **Environment**: Sustainable communities that are resilient to climate change, enhance the natural environment, improve biodiversity and are supported by our zero-carbon transport network.
- **Health**: Improved health and wellbeing and reduced health inequalities enabled through active and healthy lifestyle and inclusive, safe and resilient communities.
- **Place shaping**: Sustainable and resilient communities which provide healthy places for people and a high-quality environment capitalising upon the exceptional quality of life, vibrant economy and dynamic communities of our county.
- **Productivity**: A world leading business base that is sustainable, has created new jobs, products and careers for all communities and is supported by an effective, zero-carbon transport network.
- **Connectivity**: Communities are digitally connected, innovative technologies are supported and there is improved connectivity and mobility, across the county, enabling greater choice and seamless interchange between sustainable modes.

Draft policies

46. A key policy is the establishment of a transport user hierarchy which sets the direction for the rest of the LTCP and clearly outlines the order in which different modes of transport will be considered in the policy development and scheme design process, viz:

- Walking (including running and mobility aids)
- Cycling and riding (bicycles, non-standard cycles, e-bikes, cargo bikes, e-scooters and horse riding)
- Public transport (bus, scheduled coaches and rail)
- Shared vehicles (taxis, car clubs and carpooling)
- Motorcycles
- Other motorised modes

47. **The LTCP introduces a set of 'headline targets'**

- **By 2030 the proposed target is to: replace or remove 1 out of every 4 current car trips in Oxfordshire**
- **By 2040 the proposed targets are to:**
    - **Deliver a zero-carbon transport network**
    - **Replace or remove 1 out of every 3 current car trips in Oxfordshire**

48. **By 2050 the proposed target is to: deliver a transport network that contributes to a climate positive future** Notably however these targets and the policies intended to deliver them are not derived from any particular volume or distribution of employment and housing growth or projected increases in travel demand

Spatial Plans

49. The draft LTCP part 1 (January 2022) sets out an 'Area Strategy Progress Review' in its Annex 5. Area strategies for Witney, Carterton, the A40 and A420 Corridors, Banbury, Bicester and Science Vale will be developed in part 2 of the Plan and a Central Oxfordshire Travel and Connectivity Strategy will replace the Oxford Transport Strategy. It is understood that Central Oxfordshire strategy will be the first and will be ready for consultation in 2023. Clearly this will need to be linked with emerging Oxfordshire 2050 Plan policies for growth which, in turn, are consistent with the Oxfordshire Vision.

Climate change and Local Transport and Connectivity Plan

50. Decarbonisation is a key overriding challenge that the LTCP seeks to address. Decarbonising transport is a critical part of reaching net-zero emissions and addressing climate change. In order to set out how this will be achieved, the government published the Transport Decarbonisation Plan in July 2021.

51. The Transport Decarbonisation Plan reiterates commitments to end the sale of new petrol and diesel cars by 2030 and proposes ending the sale of non-zero emission HGVs by 2040. It also highlights the need to make better use of road space and encourage more trips by walking, cycling and public transport. The document sets out a role for LTPs by suggesting that for future local transport funding they will need to demonstrate how local areas will reduce emissions through a portfolio of transport investments.

52. The LTCP builds on these recommendations and will be consistent with the Oxfordshire *Leading the Way Scenario* (see Section 2.4.2). This scenario is driven by high levels of public support for local action and strong policy, as well as lifestyle change amongst householders and communities. In terms of transport the following key features are identified:

- Energy demand associated with transport falls as Oxfordshire residents incorporate walking and cycling into their daily routines.
- More amenities are provided locally, and businesses support remote working.
- Reduced car-usage is also driven by extensive pedestrianisation measures, workplace charging levies, the proliferation of low traffic and higher density neighbourhoods, and the expansion of shared transport options.
- Vehicle electrification occurs more rapidly than in other scenarios, and sharing business models, are pioneered in Oxfordshire.
- Freight consolidation centres and other localised warehousing and production enable low carbon local delivery of goods throughout urban areas.
- Recognising the need for rapid reductions in greenhouse gases in this decade, the LTCP aims for a zero-carbon Oxfordshire transport system by 2040. It recognises that achieving this target will be challenging, requiring technical innovation, bold policy decisions and widespread behaviour change. However, the benefits are significant. Delivering this target will ensure that Oxfordshire plays its part in tackling climate change. By leading the way, we will help others to get there quicker and will create opportunities for Oxfordshire based enterprises. Decarbonisation will also deliver wider benefits to biodiversity and people's health and wellbeing in Oxfordshire.

53. The approach to decarbonisation is primarily by seeking to reduce unnecessary private vehicle use and increasing the proportion of trips made by walking, cycling, public and shared transport. Policies are outlined to support the uptake of zero-emission vehicles, encourage home working and support alternative modes for the movement of goods. However, it is also acknowledged that there may be situations in some parts of the county where management measures may be needed in order actively to discourage car use.

The status of the Local Transport and Connectivity Plan

54. It is expected that the final Part 1 Local Transport and Connectivity Plan will be published in July 2022. Part 2 – **the area and corridor strategies and supporting county-wide Rail and Bus Strategies will be published during the following year[23].**

Stakeholder engagement

55. A consultation draft of part 1 was published in January 2022 accompanied by supporting strategies for Active Travel, Freight and Innovation. This followed engagement with the public and key stakeholders on 2 previous occasions: topic paper engagement in March 2020 and the vision document consultation in February 2021. In total 1044 responses were received to the engagement exercises, both from individuals and organisations.

2.4.3. Oxfordshire Infrastructure Strategy (Stage 1 and Stage 2)

Purpose and scope of the strategy

56. The Oxfordshire Infrastructure Strategy (OxIS) is a Future Oxfordshire Partnership-commissioned project involving the county's six local authorities and OxLEP, with the purpose of prioritising infrastructure requirements to 2040 and subsequently, in Stage 2, to 2050.

57. Stage 1 of the Oxfordshire Infrastructure Strategy (OxIS) provides a long-term framework for Oxfordshire to identify the priorities for investing in strategic infrastructure, such as transport, utilities, healthcare provision, as well as identifying potential delivery and funding opportunities. It has been undertaken in partnership with Oxfordshire County Council (OCC), Oxfordshire's five District Councils and other key partners and the scope has been endorsed by the Future Oxfordshire Partnership.

58. OxIS is focused specifically on strategic infrastructure and is designed to support local plans but not replicate them. OxIS only considers schemes that can be delivered through capital funding and also discounts schemes that are already delivered, currently under construction or at an advanced stage of delivery planning (e.g., with full funding identified). Schemes already established in adopted Local Plans as an intrinsic requirement for the delivery of development sites by developers through the planning process (e.g., biodiversity net gain, highway mitigation, internal community centres) have also been discounted. OxIS aims to:

- Set out the priority strategic infrastructure investment needed to support sustainable, clean, healthy and inclusive growth in Oxfordshire, reflective of the ambition to build a global business innovation ecosystem and aligned to the five OxIS Themes
- Continue to shape and influence investment strategies at a national, sub-national and local level; maximising the efficiency and effectiveness of existing infrastructure and reducing the demand for new infrastructure, supporting Oxfordshire's role as a global innovation hub

[23] The delay in the completion of the Oxfordshire 2050 Plan offers an opportunity for these the area and corridor strategies and supporting county-wide Rail and Bus Strategies to be fully integrated with the Oxfordshire 2050 Plan finalization. This is an opportunity to be seized.

- Plan for infrastructure over a longer-term horizon to complement and provide evidence to support the emerging Oxfordshire Plan 2050
- Provide an investment prioritisation that can be applied as relevant funding sources become available.

OxIS draft themes and policies

59. The Strategy includes five OxIS Themes. These themes are consistent with established and emerging policies across Oxfordshire, including Oxfordshire's Strategic Vision for Long Term Sustainable Development (2021) and the current draft Local Transport and Connectivity Plan. The purpose of the five OxIS Themes is to provide a structural framework for the identification of future infrastructure needs to 2040 to support sustainable, clean, healthy and inclusive growth in Oxfordshire. Please see Figure 3, Annex 3.

Oxfordshire Infrastructure Strategy – Focus Areas

60. Focus Areas have been introduced to replace the corridor-based approach of the earlier OxIS-17. This enables a greater consideration of schemes which may be lower in cost but remain strategically important to the creation of successful places. The OxIS place based local focus areas have been split into two categories (please refer to Figure 4 in Annex 3):

- OxIS Towns and Surrounds: Established urban areas comprising Oxford City and key towns where notable levels of change are forecast to 2040
- OxIS Rural Communities: Rural communities across Oxfordshire constituting both villages and urban-rural fringes where notable levels of change are forecast to 2040

Strategic 2040 Infrastructure Needs

61. The themes have been used as a framework to refine 25 outcome-led Sub-Themes. These Subthemes represent Oxfordshire's future needs for infrastructure investment to 2040 and underpin the needs-based appraisal component of the infrastructure scheme multi-criteria appraisal.

62. The outcome of the sifting and filtering process resulted in the identification of 259 OxIS strategic infrastructure schemes qualifying to appraisal. Over half these schemes fall into the transport infrastructure type. Schemes across the remaining twelve categories are generally evenly distributed; except for Digital (IF5) where no schemes have been identified; due to the commercial nature in which digital infrastructure is delivered.

63. The OxIS Stage 1 scheme list has some outstanding gaps associated with infrastructure that is the responsibility of key external infrastructure providers and utility providers including commercial digital infrastructure companies as well as the Environment Agency, Thames Water and SSEN.

64. Extensive engagement with these stakeholders has been undertaken through the Stage 1 process, however, limited information has been provided on schemes that remain reliant on funding; some of which is a result of commercial sensitivities. This means that there is presently a lack of some of these related schemes considered within OxIS Stage

65. **A key finding of this work is that the identified OxIS schemes do not fully address Oxfordshire's needs to 2040.[24] These gaps are amplified by the challenge in engagement with infrastructure providers as well as policy and societal changes since Infrastructure Development Plans were prepared. Many of Oxfordshire's plans and wider policy and strategy documents pre-date the declaration of a climate emergency in 2019 and the subsequent county-wide and district Climate Action Frameworks produced in 2020 and 2021. This recent shift in priorities means there**

[24] See Chapter 5 of the OxIS Stage 1 Technical Report.

is a substantial absence of schemes currently identified which specifically aim to reduce carbon emissions across the county, further highlighting the need for this updated and needs-based OxIS.

66. **There are significant shortcomings in the existing digital infrastructure, particularly in urban areas. This has been amplified by the recent spike in home working and shopping, as well as significant global uptake in digital technology. Non-Commercial Full Fibre Broadband Schemes: Oxfordshire currently only has 16.5% of its county covered by full-fibre broadband, behind proportional figures for the region and the nation. The commercial sensitivity of the private sector means that the identification of future schemes which are not commercially viable is not yet possible.**

67. Digital Upgrade of Public Assets: The onset of 5G and the Internet of Things means there is an opportunity for further schemes to be identified (e.g., digitalisation of street furniture). Electricity Supply Grid Capacity Schemes: There is currently an absence of tangible strategic schemes identified by Oxfordshire's Distribution Network Operators (DNOs) to address the combined challenge of additional grid demand placed by future housing growth in the county alongside increasing electric vehicle charging infrastructure. Wastewater Schemes: There is a lack of strategic schemes currently identified to ensure that the need for sufficient wastewater processing capacity across Oxfordshire continues to be met in the context of future population growth. Partnership working with Thames Water is required to identify any forthcoming schemes. Wastewater schemes that are fully funded by Thames Water are excluded from scheme appraisal. Bus Priority Schemes: Quality bus services have an important role in providing regional sustainable connectivity, as well as achieving net zero transport emissions[25], socially integrating places, driving economic growth, reducing socio-economic inequalities, improving access to health service and spaces for physical activity and providing inclusive access to education. Rapid Transit Schemes: Similar to bus priority, rapid transit schemes in the form of quality bus, tram or rail services are internationally recognised to provide multiple benefits to address key OxIS Needs.

68. OXIS has developed an approach to multi-criteria evaluation of project proposals to prioritise projects. It is recommended that the criteria are assessed for consistency with recent national and local policy initiatives.[26]

The Status of the OXIS

69. The report will be followed by the OxIS Stage 2 Report in 2022 that will consider new proposals for strategic infrastructure required to meet Oxfordshire's needs in the period to 2050. The OxIS Stage 2 Report will be aligned with the Oxfordshire Plan 2050, which is a forthcoming Joint Statutory Spatial Plan identifying key areas where sustainable housing and employment growth can occur to 2050 and which will underpin the next iteration of Oxfordshire's District Local Plans.

[25] The National Infrastructure Commission Report (2020) identifies a critical need for future infrastructure schemes to reduce carbon emissions both from energy and transport sources (approximately 82% of Oxfordshire's carbon emissions).
[26] The needs-based appraisal is grouped by the five OxIS Themes and assigned a score across each of 25 needs identified and assessed. Each scheme is assigned a score on a seven-point scale to determine its relative ability to fulfil Oxfordshire's future needs to 2040. This scale incorporates both positive and negative scoring ranging from -3 to +3 to reflect that some schemes can both contribute and detract from these needs; for example, in relation to socio economic inequalities (P2) and carbon emissions (E1). Each of the needs are scored against outcome led measurable datasets to identify what the County requires for infrastructure to support planned growth.

Stakeholder engagement

70. A series of thematic workshops and targeted engagement forums were held with key subject matter stakeholders and infrastructure providers to verify and refine the future needs to 2040 as well as to agree the core measurable outcomes.

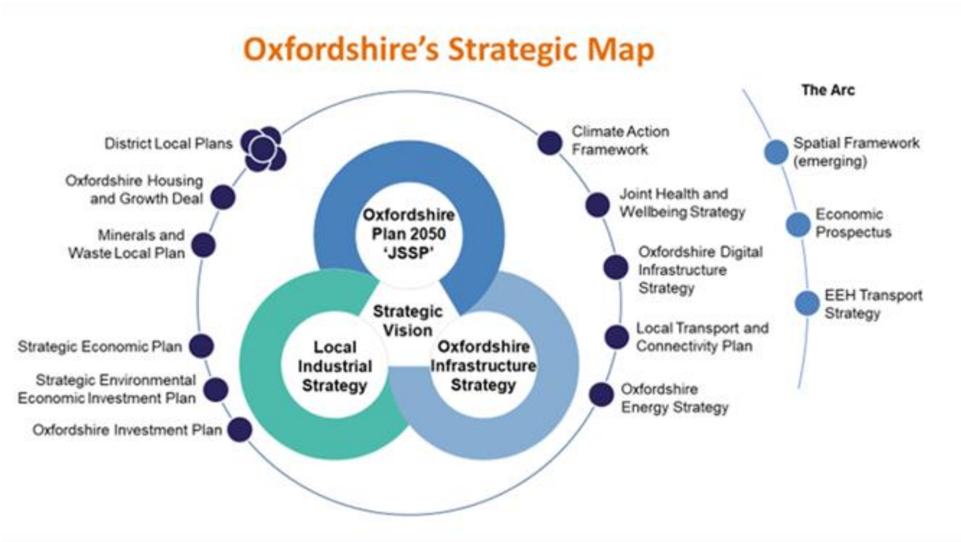
2.4.4. Other strategies and plans

71. The diagram shows some of the plans and strategies and how they fit together, at least diagrammatically. The strategies and plans described in this booklet

- **OxLEP Economic Recovery Plan**[27] - It provides a comprehensive and co-ordinated County-level economic route map for recovery from the COVID-19 pandemic, and the damage impacted on Oxfordshire's People, Places and Businesses. It has a near-term timeframe covering a period of 24 months, running from Spring 2021 through to Spring 2023. It provides a flexible framework for Oxfordshire partners to co-ordinate and target interventions and measures to support recovery at the most effective level, where it is most needed – be it County-wide, at district level or in specific wards. The Plan is complementary to existing investment plans, most notably the Oxfordshire Local Industrial Strategy and The Oxfordshire Investment Plan. It also acts as a basis for future proposals to Government under the UK Shared Prosperity Fund, the Levelling-Up Fund, innovation investment through the UK R&D Roadmap and funding in support of connectivity projects via DfT and DCMS. It is noted that it forecasts that Oxfordshire could have around 6,000 fewer jobs by 2031 (relative to a pre-pandemic trajectory), it identifies that there is likely to be continued strong demand for the Research and Development floorspace property market.
- **Oxfordshire Rail Corridor Study** – the study assesses the impact of planned growth in jobs and housing on Oxfordshire's rail system and identifies the role that rail can play to support the delivery of that growth. It reflects and aligns with both the Housing and Growth Deal and the Oxfordshire Local Industrial Strategy.
- **Oxfordshire Digital Strategy** - sets out the framework for delivering full-fibre broadband and mobile provision across Oxfordshire. It builds on the extensive work that the Digital Infrastructure Programme has done with suppliers, partners, and government to get superfast broadband access to over 97% of premises in Oxfordshire.
- **Oxfordshire Energy Strategy**[28] - will demonstrate to the UK how we can consume energy more efficiently and harness it for future generations. The strategy can also provide the building blocks for a stand-out, low-carbon sector. It already makes a significant contribution to Oxfordshire's economy, generating £1.15bn a year (seven per cent of Oxfordshire's GVA). The Oxfordshire Energy Strategy can help to spearhead a further £1.35bn annually to the local economy, creating over 11,000 new jobs by 2030. In doing so, it would also mean the county will deliver emissions reduction targets in-line with local and national expectations, meaning the strategy will play a key part in addressing climate change too. It is a key strategic influencer on the Oxfordshire Plan and sets objectives (see Section 2.2.2, Climate change).
- **Joint Health & Wellbeing Strategy** - the priorities can be summarised as: Agreeing a coordinated approach to prevention and "healthy place-shaping"; Improving the resident's journey through the health and social care system (as set out in the Care Quality Commission action plan); Agreeing an approach to working with the public so as to re-shape and transform services locality by locality; Agreeing plans to tackle critical workforce shortages.
  In addition to these priorities for the Board we will be developing our work together on a wide range of issues that affect different groups in the population. These are set out in the body of the strategy using an approach which covers all ages and stages of life– ensuring A Good Start in Life, enabling adults to continue Living Well and paving the way for Ageing Well. Many factors underpin our good health and we will work together to address these too under the heading Tackling Wider Issues That Determine Health.

[27] Oxfordshire's Economic Recovery Plan: The ERP Action Plan, OxLEP 2021
[28] https://www.oxfordshirelep.com/energystrategy

Figure 1: Diagrammatic summary of current plans and strategies



Source: Future Oxfordshire Partnership

3. POINTS TO CONSIDER IN THE IMMINENT CONSULTATIONS

Section 3 uses key findings of the assessment of Section 2, 'where we are now,' and identifies some of the questions which need to be answered in the process of finalization of the various strategies and plans in the imminent public consultations

3.1. How to achieve the Vision - the three 'elephants in the room'

Section 3.1 describes the 'elephants in the room' – the big issues which the draft plans and strategies need to deal with – growth, climate change and development funding.

3.1.1. Growth (and the Oxfordshire Growth Needs Assessment)

72. **All the plans and strategies being prepared need to be based on a common agreement on the longer-term scale, pace and distribution of growth, commensurate with the Vision.** The Oxfordshire Growth Needs Assessment (OGNA) was commissioned to provide the basis for achieving the common agreement and it was published in July 2021.[29] The assessment is divided into three reports:

- **The Phase 1 Report**, which addresses housing need, economic growth and employment land requirements for Oxfordshire, and appraises the high-level commuting and affordability implications;
- Following on from this, **the Phase 2 Report** defines and characterises the Oxfordshire Functional Economic Market Area, which is used to develop and test scenarios for the distribution of Phase 1 housing need and employment growth within Oxfordshire;
- Finally, to reflect the emergence of the Covid-19 pandemic during the development of the OGNA, a **Covid-19 Impacts Addendum** has been produced to sense-check, contextualise, and update the results of the Phase 1 and Phase 2 Reports in light of these developments

[29] Oxfordshire Councils Growth Needs Assessment: Executive Summary, Phase 1 Report, Phase 2 Report, Covid Addendum, July 2021 (Iceni, JG Consulting and Cambridge Econometrics).

Phase 1 Report

73. The OGNA modelled three alternative economic trajectories to 2050 to consider potential housing and employment land need:

- **Standard Method[30] trajectory**
- **Business as usual trajectory**: this trajectory represents a continuation of Oxfordshire's recent (pre-pandemic) economic performance, taking particular account of the robust growth delivered during the recovery from the 2008-09 recession.
- **Transformational trajectory**: this trajectory is broadly the equivalent of the Oxfordshire Local Industrial Strategy's (LIS) aspirational "go for growth" scenario, but updated and adjusted to 2020. All of the trajectories have a baseline of 2018, the latest available year of data at the time of writing.

74. OGNA's adjusted Standard Method trajectory shows 85,400 additional jobs in Oxfordshire by 2050, modelling the level of economic activity that could be expected to be supported by delivery of housing in line with the Standard Method calculations. **However, it should be noted that the current OGNA substantially increases the projected future population of the Office for National Statistics 2018 based population projections. The OGNA does this by using what it calls an "adjusted baseline population projection".[31]**

75. The business-as-usual projection models a continuation of Oxfordshire's recent (pre-pandemic) robust growth. This shows 122,500 additional jobs in Oxfordshire over the period to 2050. At this pace of growth, Oxfordshire is expected to have continued along its recent growth trajectory, and achieved some its LIS-related ambitions.

76. The highest scenario, the transformational trajectory, models the equivalent of delivering many of the aspirations set out (but not quantified for the longer term to 2050) in the Oxfordshire Local Industrial Strategy, and results in 171,200 additional jobs in Oxfordshire over the period to 2050. The Oxfordshire Local Industrial Strategy sets out an ambitious vision for Oxfordshire to be one of the top three global innovation systems by 2040[32].

Employment growth relative to housing growth and commuting

- *A lower employment growth trajectory relative to higher housing growth could see a reduction in Oxfordshire's net commuting, potentially below historic (pre-1991) levels. This would mean there are more residents than jobs in the county, so residents commute out for work.*
- *A higher employment growth trajectory relative to lower housing growth could see an increase in Oxfordshire's net commuting, above current record-highs. This would mean there are more jobs than residents in the county, so out of county residents commute in for work.*
- *A similar employment and housing growth trajectory would see a steady decline in Oxfordshire's net commuting as it returns to 'normal' levels. The number of jobs is still marginally higher than the number of residents in the county, reflecting Oxfordshire's historically higher commuting ratio*

77. **A number of technical criticisms have been made of the OGNA approach which reduce its credibility[33]. In addition, central government is in the process of revising the way in which housing**

[30] The Standard Method for calculating Local Housing Need, introduced to the planning system following the 2017 Housing White Paper, was intended to simplify and speed-up the process of deciding on a housing requirement for Local Plans.
[31] Please refer to footnote 14 for evidence from a review of initial 2021 census results
[32] Overall, the evidence suggests that the scale of employment land needed across Oxfordshire could be up to 807 ha. The precise scale will be influenced by decisions on what growth scenario to take forward in the Plan.
[33] See, for example, Oxfordshire Growth Needs Assessment Review, Opinion Research Services (ORS), March 2022. Opinion Research Services (ORS) was asked by Cherwell Development Watch Alliance to review the methodology, analysis and conclusions of Oxfordshire Growth Needs Assessment 2021 and in particular its three housing requirement projections.

need is assessed. It is highly recommended that the approach to the OGNA is the subject of review before it is applied in the final stages of preparation of the key strategies and plans described in this booklet.

78. The current OGNA proceeds to model what level of housing provision might be needed to accommodate these levels of growth, taking into account factors such as the changes in the age structure of the population and the proportion of people of different ages in work. **The analysis shows that to meet the Standard Method (adjusted) level of need over 2020-50, Oxfordshire would require around 3,400 dwellings each year; with the business-as-usual level of growth this increases to 4,100 dwellings per annum, with a transformational figure approaching 5,100 dwellings per annum, dependent on the realisation of LIS-related ambitions[34].**

79. For the purposes of the Oxfordshire 2050 Plan, OGNA suggests that planning for higher levels of housing provision than the Standard Method provides **greater potential both to support economic growth and deliver affordable housing; and a greater likelihood of improving the affordability of market housing over the plan period to 2050[35]**.

80. Over the past decade, relative to the supply of housing, employment growth has accelerated in Oxfordshire. **This has had implications for both net commuting and housing affordability, which have both increased significantly in the county over this time**. **OGNA analysis has identified a statistically significant relationship between the balance of housing and employment growth in local areas, and the implications for commuting levels and affordability. The analysis shows housing delivery above that required to sustain the associated level of employment growth will likely result in a reduction of net commuting and an improvement in housing affordability within Oxfordshire**.

Employment growth relative to housing growth and impact on affordability

- *A lower employment growth trajectory relative to higher housing growth would see a significant reduction in Oxfordshire's affordability ratio relative to the England average. This could result in housing in Oxfordshire being as affordable as elsewhere in the country.*
- *A higher employment growth trajectory relative to lower housing growth would see a steadier reduction in Oxfordshire's affordability ratio relative to the England average. Housing would still be around 1.2x less affordable in Oxfordshire than elsewhere in the country though.*
- *A similar employment and housing growth trajectory would still see a notable reduction in Oxfordshire's affordability ratio relative to the England average. This could result in housing in Oxfordshire being marginally less affordable than elsewhere in the country*

81. The intention of the three economic and housing trajectories is to ensure the delivery of employment and housing growth in Oxfordshire will become more aligned. **The trajectories address this by incorporating a lowering of the ratio between the number of jobs relative to the number of dwellings in Oxfordshire, demonstrating how a balance of future housing and economic growth can stabilise and lower affordability and commuting pressures. Such outcomes are consistent with the Oxfordshire Vision in respect of inclusivity and the various environmental and other benefits of reducing commuting and associated traffic congestion**.

Phase 2 Report

82. Following on from the Phase 1 Report, the Phase 2 OGNA Report considers a range of high-level scenarios for the spatial distribution of housing and employment need across Oxfordshire. The

[34] For comparison the Oxfordshire Housing and Growth Deal provided funding for affordable housing and infrastructure improvements to support the ambition of building 100,000 homes between 2011-31 (i.e., 5,000 p.a.) to address the county's severe housing shortage and support economic growth.
[35] As noted elsewhere in this booklet, this approach needs to be assessed in the context of the climate change / environmental and social / inclusivity aspects of the Oxfordshire Vision.

purpose of this is to aid decision-makers in understanding the implications of alternative spatial choices. **It does not seek to identify specific options or priorities for development, but rather explores the potential scale and implications of different approaches.**

83. The following summary highlights and draws out the key findings of the Phase 2 Report regarding the definition and characteristics of the Oxfordshire Functional Economic Market Areas (FEMA), the scenarios for the distribution of housing need and employment growth, and their resultant implications for commuting and transport use

84. Functional Economic Market Areas are designed to capture the extent and spatial distribution of a local economic market more accurately than administrative boundaries, which rarely reflect the true scale and reach of local economic markets and accompanying economic flows. The analysis of several economic, demographic, and social markets and indicators showed that the county of Oxfordshire is a reasonable approximation for the Oxfordshire FEMA, with Oxford at its centre. Further spatial levels ('Zones') have also been identified within the FEMA, each with their own distinct characteristics and economic attributes. These include:

- **Oxford City Centre**: the area with the highest concentration of economic activity, as well as central urban amenities, with a strong and growing services-led economy.
- **Oxford City Fringe**: the area surrounding the City Centre, characterised by a high degree of integration with and connectivity to the City Centre, and the presence of important urban fringe sites, such as science parks and large suburb, as well as the undeveloped Green Belt. An area of diverse and fast-growing economic activity.
- **The Knowledge Spine**: an area of globally-recognised knowledge activity that runs through the centre of the FEMA, largely along the A34 corridor. Straddling the City and Centre and Fringe, it comprises a Northern and a Southern part. Both areas have seen robust economic and housing growth of late.
- **The Wider County**: areas that remain outside both the Knowledge Spine and City Centre and Fringe. They comprise three roughly equal parts of comparable economic activity and functionality: County East, County West and County North. Pockets of high economic and housing growth can be found within these predominantly rural areas.

85. Drawing on the definition of the Oxfordshire FEMA and its constituent spatial levels ('Zones'), the OGNA has explored the potential spatial distribution of the three Oxfordshire-wide employment trajectories to 2050 (as prepared and presented in the Phase 1 Report). **Over the longer time frame of the Phase 1 employment trajectories (to 2050), there is the potential for a more spatially balanced growth picture to emerge compared to recent (2011-18) trends. Central Oxfordshire, encompassing the Knowledge Spine (including Oxford City and Fringe), is expected to remain a significant driver of economic activity, accounting for a potential two-thirds of net additional jobs in the FEMA to 2050**

86. Having considered the scale and pattern of potential economic growth within the Oxfordshire FEMA, the OGNA proceeds to illustrate a range of spatial distribution scenarios for the FEMA-wide housing need to 2050. By taking the opportunity to quantify and test a range of different scenarios for housing distribution, the potential implications and trade-offs of different development choices can be identified and contrasted at a high-level.

87. The distributions of housing need have been informed by a set of contrasting housing scenarios. The scenarios cover a variety of contrasting development choices for need after the 2020-31 period of Local Plan forecast completions. The scenarios include:

- **An evenly dispersed scenario** – which sees housing need allocated at an even percentage rate (not quantity) across the FEMA.
- **A continued trends scenario** – mirrors current concentrations of forecast net completions in Local Plans (which cover 2020-31), extrapolating them over the additional 2031-50 period.

- **An employment-led scenario** – sees need matched to the distribution of projected Zonal employment growth, including growth in LIS-outlined key employment locations.
- **A County-focussed scenario** – focuses need on the Wider County, resulting in the lowest proportion of need allocated to Oxford City Centre and Fringe and the Knowledge Spine.
- **A centralised scenario** – focuses need on central Oxfordshire, incorporating Oxford City Centre and Fringe and the Knowledge Spine. This results in the lowest proportion of need allocated to the Wider County.

88. The distribution scenarios cover a variety of contrasting development choices, ranging from an economic-led focus on distribution in central Oxfordshire (Oxford and the Knowledge Spine), to a more evenly dispersed approach across the county, to an emphasis on market towns in Wider County areas. **It should be emphasised that these scenarios do not reflect preferred options or priorities for economic growth or housing delivery, but are rather hypothetical distributions to better understand the implications and trade-offs of different development choices at a high level**[36].

89. The OGNA specifically focusses on understanding the consequences for commuting trips, modal share and private vehicle miles within the FEMA, particularly given their important role in attaining net zero ambitions for the county. **Analysis of recent trends has shown that, as a result of employment growth accelerating relative to the supply of housing, commuting into the Oxfordshire FEMA has more than doubled over the past decade. This means more people are commuting – and commuting further, typically using private transport - to work in the FEMA, exacerbating congestion and environmental effects.**

90. **Though the scale of potential employment and housing growth in Oxfordshire will increase the absolute number of commuting trips within the FEMA, the OGNA has found that, given certain development choices, there is the potential for the length of these trips to decrease, for modal share to shift towards greener, more sustainable forms of transport, and for millions of private vehicles miles to be taken off Oxfordshire's roads by 2050. This is of course an important factor for the Local Transport and Connectivity Plan and Oxfordshire Infrastructure Strategy (Stage 2) to fully incorporate. It would have been helpful to have had this analysis before 2021 and early in the preparation period of these associated plans and strategies.**

91. **Such outcomes are increasingly desirable given the growing pressure on Oxfordshire's transport network, associated externalities (notably, environmental and emissions effects), and the desire to attain net zero, and should therefore be considered in the appraisal of any future spatial development options for the FEMA**.

92. **In determining the appropriate strategy and how much development to plan for, the evidence in the assessment needs to be brought together with broader factors including the capacity to accommodate growth and environmental consequences of different levels of growth.**

OGNA and COVID

93. **Having assessed the potential impact of the pandemic, the OGNA considers that the analysis underpinning the Phase 1 and Phase 2 reports remains valid, although there is a need for the planning system to build in flexibility: analysis needs to continue as more is learnt about the lasting impacts of the pandemic.**

94. **What may change is how policy makers calculate these implications, depending upon which version of the future they think is most likely to occur, as captured by the three post-Covid scenarios presented in the OGNA addendum on the pandemic. The scenarios, which look ahead to 2050, cover a range of feasible and contrasting behavioural changes as a result of the pandemic:**

[36] It should also be noted that these scenarios do not take into account specific site constraints, phased need, or development sites outside of the Local Plan period (2020-31).

- **Scenario 1: a 'relative' return to normal – a conservative scenario for the adoption and durability of remote working.**
- **Scenario 2: a new normal – a more likely scenario of a popular and widespread adoption of a 'hybrid' model of remote working.**
- **Scenario 3: a step change – an ambitious scenario assuming a positive step change in the adoption and durability of remote working.**

3.1.2. Climate Change

95. One of the main changes over the last twenty years to the way in which development planning is undertaken, has been the intensification of concern with the implications of climate change and the need to mitigate the impacts and adapt to them. The Oxfordshire Vision reflects this and work to date on the Oxfordshire 2050 Plan, Oxfordshire Infrastructure Strategy and Local Transport and Connectivity Plan also reflect this to varying degrees. But is enough being planned?

Pathways to Net Zero

96. We are very fortunate in Oxfordshire that we have the University of Oxford's Environmental Change Institute (ECI) on our doorstep and that the Institute has applied its immense capability to analysing aspects of climate change in Oxfordshire. The most recent product is the '*Pathways to a zero carbon Oxfordshire*' report[37]. The report outlines different potential pathways to achieving a zero-carbon economy in Oxfordshire by 2050:

- **Societal Transformation** is led from the bottom up, with householders adopting new technologies and practices, and community groups corralling action.
- **Technological Transformation**, by contrast, relies on systemic changes driven at the national level, including the deployment of hydrogen for heating and other technical solutions which require the least change to individual behaviour.
- Finally, **Oxfordshire Leading the Way** mirrors the widespread cultural and behavioural changes seen in Societal Transformation, and combines this with high deployment of new local electricity generation using solar photovoltaics.

97. The most ambitious of these, the '*Oxfordshire Leading the Way*' scenario has been identified as the recommended route for the county to follow. With this scenario, Oxfordshire would go further and faster than other areas of the UK in achieving zero carbon emissions.

98. The report analyses the implications of net-zero for different sectors of the economy:

- **Low carbon innovation**: Oxfordshire's low-carbon sector is thriving. Two of four national energy systems demonstrator projects are based in Oxfordshire, and its automotive sector continues to lead the way on innovation for autonomous vehicles, electric powertrain development and battery technologies. The University of Oxford has successfully generated 30 new cleantech spinout companies alone, with many more establishing a presence within the county and pioneering new technologies to address the challenges created by the climate emergency. The low-carbon sector is also thriving alongside high-tech industries, as community groups and SMEs develop solutions to reduce carbon emissions through alternative business models and the sharing economy.
- **Transport**: Like the UK as a whole, Oxfordshire has struggled to reduce emissions from transport, despite successes such as accelerated uptake of electric vehicles in the county and increased cycling in Oxford City. **There remains significant potential for more widespread walking and cycling, as the transition to net-zero cannot rely on electric vehicles alone. The key components of pathways to decarbonise transport are 'Avoid, Shift, Improve'. Switching to electric is an example of 'Improve', while telecommuting can be a way to 'Avoid' travel. A 'shift' to local, active travel can help increase footfall**

[37] Pathways to a zero carbon Oxfordshire, Environmental Change Institute, University of Oxford, 2021

on local high streets and ease congestion as well as improving health. There is an urgent need for improved infrastructure for public transport and active travel; controlling and charging for parking; supporting digital connectivity that reduces the need to travel; requiring new developments to be compact and walkable; and encouraging the uptake of zero emissions vehicles.

- **Energy efficiency and heating in buildings**: All pathways to net-zero require profound and widespread changes to the built environment. This includes upgrading the energy efficiency performance of the majority of buildings across Oxfordshire, and replacing heating systems which rely on fossil fuels (gas and oil), with low and zero carbon technologies (heat pumps, biomass, hydrogen). The markets for goods and services to create and maintain low-carbon buildings are small and immature. **A much stronger focus on market creation and development is needed if existing technologies are to be deployed at the scale and quality required. Not only does this imply a need for a skilled workforce of installers, advisors and other intermediaries, but also regulated minimum standards to create demand, supported by a much more rigorous system of compliance-checking. There is a need to simultaneously stimulate demand and supply for high quality products and services to reduce emissions from the built environment**.
- **Low Carbon Energy**: Solar energy is Oxfordshire's greatest low carbon energy generation resource with the county already contributing more than 3% of the total UK solar photovoltaic capacity, more than double its share of population and land area. **There is significant potential to expand local solar PV electricity generation. Each of our net-zero pathways includes substantial deployment: the most ambitious sees installed capacity expanded by up to 10 times. Increasing local renewable electricity generation is needed in response to an expected doubling of electricity demand due to the electrification of heating, transportation and high population growth, ensuring Oxfordshire takes a leading role in the decarbonisation of the electricity sector nationally. To maximise local benefits, Oxfordshire should develop local energy partnerships and the proven appetite for community energy. As with all intermittent decentralised generation, high penetration can have significant impact on local networks with flexibility and data key to maximising system utilisation at the lowest cost to users. Oxfordshire is in the enviable position of hosting two national demonstrator projects (Project LEO and ESO) and a wealth of knowledge in this area which it must exploit.**
- **Land use and carbon sequestration**: Oxfordshire is dominated by intensive agriculture, with farmland occupying 70% of the county. With 14% being built-up, there is only 9% woodland and 7% other semi-natural habitats. **We estimate that currently around 316,000 tonnes of CO^2 are sequestered each year (after accounting for at least 100,000 t lost annually when land is cleared for development); a small fraction of the 4 Mt produced through use of fossil fuels. However, around 85 Mt CO2 are stored in the county's soils and vegetation and it is vital to protect and enhance this carbon store well as restoring soils, woodland and other ecosystems to enhance sequestration further. Land is a finite and precious resource, and our scenarios reveal trade-offs between demand for land for food, bioenergy, solar, housing, carbon sequestration and biodiversity. For example, it would take 37–56% of Oxfordshire's land to produce the quantity of bioenergy envisaged in the National Grid scenarios in order to provide the 'negative emissions' (via BECCS, i.e., bio-energy with carbon capture and storage) needed to reach net-zero.**

  Stringent energy demand reduction can reduce the need for such negative emission options. Shifting to a lower meat diet also has a vital role to play in freeing up farmland for sequestration. Smart land-use planning with the participation of all stakeholders is essential in order to minimise trade-offs and maximise the substantial co-benefits that could be achieved through well-designed nature-based solutions, including a mix of ecosystem restoration and regenerative agriculture that enhances soil carbon storage, as well as integrating high quality green infrastructure into new developments. The proposed new Local Nature Partnership will have a critical role in developing a Natural Capital Plan for Oxfordshire that meets targets for both net-zero and Nature Recovery, as well as securing livelihoods for farmers and health and wellbeing co-benefits for local communities.

- **Conclusions and recommendations** - all net-zero pathways will involve:
  - **The expansion of solar generating capacity in Oxfordshire**

- **A major programme of retrofit for existing homes and non-domestic buildings**
- **Prioritising climate goals when planning for new homes and developments**
- **Substantial increases in electricity demand, driven by heat and transport, requiring grid reinforcement and flexibility provided by various means**
- **The phase out of gas boilers and fossil-fuelled modes of transport**
- **A need for innovation in food production to maintain or increase output while agricultural land makes way for development, and Oxfordshire grows its fair share of biofuels.**
- **Protection and restoration of ecosystems and natural capital, for enhanced sequestration and increased biodiversity**

The Oxfordshire Energy Strategy

99. The Oxfordshire Energy Strategy is a key strategic influencer on the Oxfordshire 2050 Plan and sets objectives to:

- Secure smart, modern, clean energy infrastructure to support planned housing, industrial and commercial growth and
- Lead nationally and internationally to reduce county-wide emissions by 50% by 2030, on 2008 levels and set a pathway to achieve zero carbon by 2050.

The Oxfordshire County Council Climate Action Framework

100. Oxfordshire County Council Climate Action Framework[38] sets out the county council's plans to make itself a carbon neutral organisation by 2030, and to enable Oxfordshire as a whole to become zero-carbon by 2050. The plans include reviewing and re-orientating investment towards a new approach to the Oxfordshire Infrastructure Strategy, the Local Transport and Connectivity Plan and playing a supporting role in the development the Oxfordshire Plan 2050.

Oxfordshire Local Plans and Climate Change

101. Since the adoption of the Oxfordshire Energy Strategy, all Oxfordshire authorities, including the County Council have declared climate emergencies which recognise the importance of addressing climate change, by reducing greenhouse gas emissions, with commitments for net zero carbon emissions.

102. While each local authority in Oxfordshire has set an aspirational date for area-wide net-zero emissions, some have chosen 2050 (County Council, West Oxfordshire DC), Vale of White Horse DC is aiming for 2045, Oxford City council for 2040 and others 2030 (Cherwell DC, South Oxfordshire DC).

103. These differences partly reflect local circumstances, such as differences between urban and rural districts, but they have substantial implications for policy, investment and local action. **Although ambitious targets can be vital for driving policy change and investment, models suggest that achieving the earlier targets will be extremely challenging, especially without significant devolution of additional powers to local authorities. However, there are additional ways to demonstrate leadership on climate change as well as target setting, such as in using planning powers to develop policies that align with net-zero carbon developments by applying 15-minute neighbourhood principles, implementing active travel infrastructure, and including ecosystem restoration**,

104. The adopted local plans for Oxfordshire set objectives for addressing climate change and achieving net zero carbon development, particularly the adopted Oxford Local Plan 2036 and South Oxfordshire Local Plan 2035 which set pathways for achieving net zero residential development by 2030, using a combination of low carbon technology, renewable energy and energy efficiency. There

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[38] 2020 Climate Action Framework, Oxfordshire County Council, 2020

is a varied policy approach taken across local plans, however, with some deferring to buildings regulations to determine standards for the design and construction of buildings.

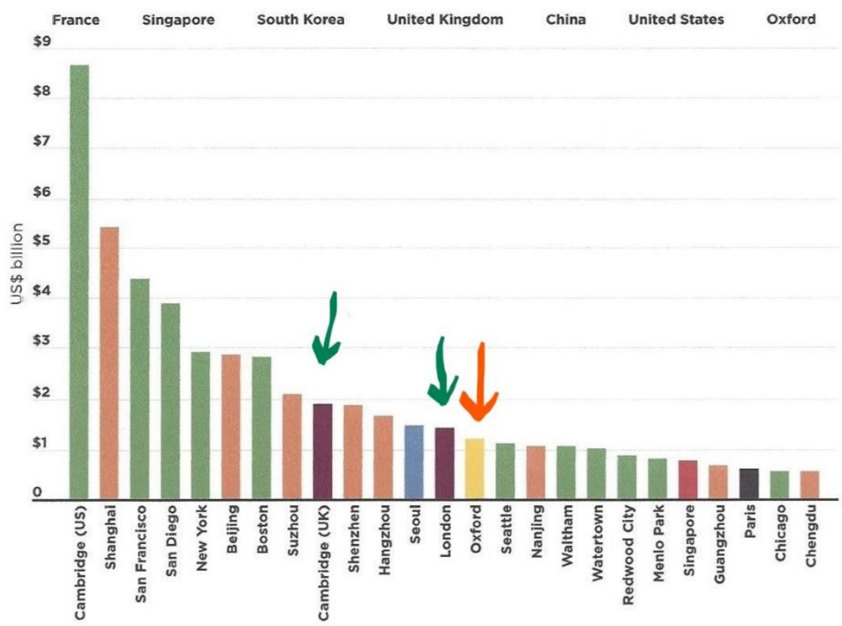
3.1.3. Development funding

Private sector[39]

105. Development funding in Oxfordshire is unlike funding in most areas of the country. Private sector funding is at an astonishingly high level. For example, in total, corporate investment raised by companies headquartered in the Oxford area totalled around £4.8 billion during 2021, of which over 58% was related to life sciences. Companies in this sector include 'drug discovery', 'discovery tools' and 'electronic equipment and instruments'.

106. Early- and later-stage fundraising, for start-up and scale-up life science companies, often involves venture capital (VC) funding. In total, in 2021, just over £1 billion was recorded as VC for Oxford. Table 2 below shows the 2021 VC raised for the life science sector but by global city. For Oxford, sitting in 13th place is an incredible achievement and demonstrates the city's and Oxfordshire's global recognition as a centre of life science research and development.

Table 2: 2021 Venture capital raised for the life-science sector by global city



107. There is clearly a need to look beyond the Oxford(shire) region to understand the prospects and identify the future occupiers. **The combined 'golden triangle' of London, Oxford and Cambridge would place it third on the chart, which is impressive and there will be additional occupiers from across the globe that will look to locate in Oxford in the future**. The role that Oxford and Oxfordshire plays in the national economy and in globally significant research should be fully acknowledged in the forthcoming decision making.

108. The map below shows distinct clustering of capital raises in 2021. There was a significant amount of Initial Public Offering activity around Oxford Science Park and Milton Park. Grants and seed funding ('Other') occurred primarily in the city centre.

The outlook for the Oxford office market – 2022 and beyond

109. Oxford's global reputation has increased significantly, and global companies, particularly within the science sectors, will have appetite to benefit from being within the Oxfordshire

[39] Much of this section has been drawn from Spotlight: Life Science Capital Raising in Oxford, Savills 18 March 2022 and Spotlight: Oxford Offices & Laboratories, Savills 18 March 2022 [Savills UK | Spotlight: Life Science Capital Raising in Oxford – March 2022]

ecosystem. Biosciences accounted for nearly two-thirds of the total level of take-up last year, which comes as no surprise. It is expected that the science sector, in general, will account for the largest share going forward. The key driver of this will be companies' appetite to co-locate with the world-class academic institutions as well as their spin-out activity[40].

110. The University of Oxford, during the past couple of decades, has led the way in terms of the value of spin-out created and the amount of capital that they've raised. Nearly three-quarters of a billion pounds was raised by spin-out companies last year, up from £500m raised in 2020. This fundraising underwrites future occupational demand levels.

111. What is clear, is the availability of Grade A office and laboratory space, which is severely limited in Oxford in the city centre and key ring road locations. The development pipeline for this year and 2023 is very low. The strength of the science sector, driven by the global reputation of the academic institutions, as well as the city's contribution to the global pandemic, has ensured the city is a top target location for companies, of all sizes, working within the many areas of human health. Consequently, there needs to be an appropriate quantity and quality of commercial real estate.

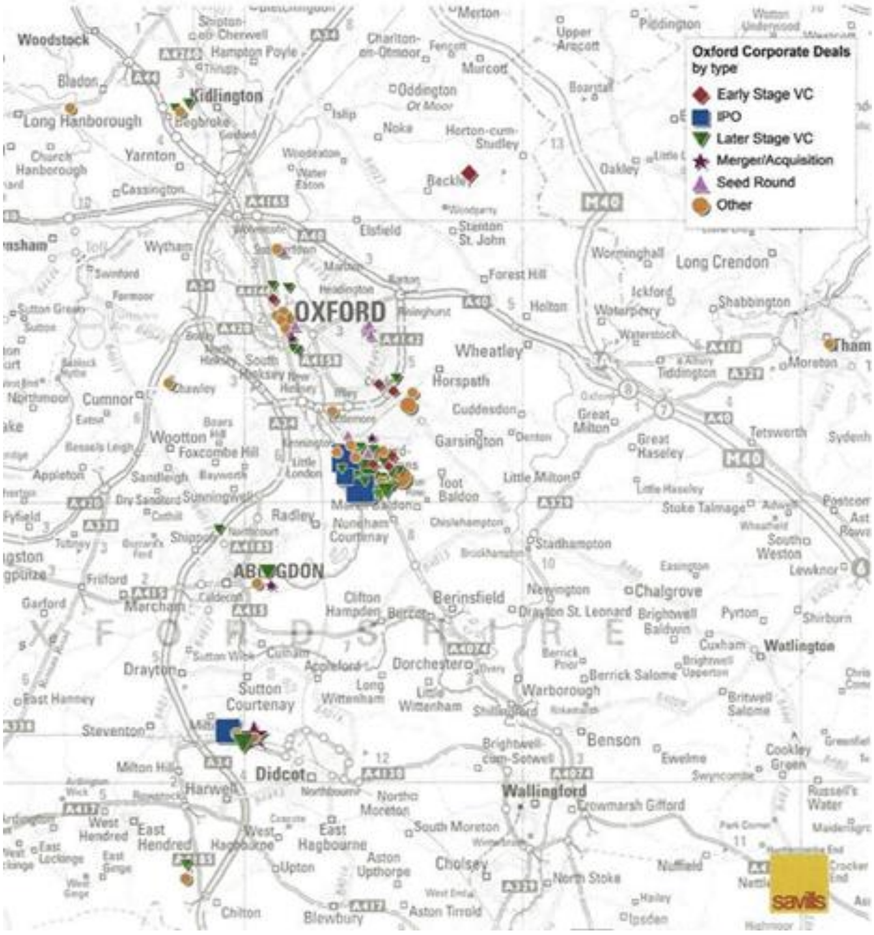


Figure 2: Oxford(shire) corporate investment in 2021

Source: Savills Research
Note that the deal symbols in some locations have been spread out to show the quantum rather having the deals sitting on top of each other

[40] A notable occupational and investment deal, acquiring 44,000 sq ft (6 acres) was the Ellison Institute for Transformative Medicine at Littlemore in close proximity to Oxford Science Park. This institute has close ties already with the University of Oxford, but this real estate deal illustrates the commitment, to the city, of a globally renowned organisation.

Public sector

112. Public sector funding is quite another story. Local authorities have experienced significant funding cuts in the last decade, and the pandemic has led to further financial woes. This has diminished services funding and staffing. The Levelling-Up agenda may also make it more difficult to negotiate central government funds for infrastructure in Oxfordshire. **Securing adequate public funding is often providing the greatest risk to infrastructure delivery.**

The Funding Gap

113. **The total cost of the infrastructure schemes for appraisal to 2040 included within Oxford Infrastructure Strategy Stage 1 is £9.1 billion. Known funding for these projects currently stands at £76 million, with a further £2.9bn anticipated to be met by the private sector, resulting in a funding requirement of £6 billion[41].**

114. It is recognised that the strategic infrastructure schemes included within OxIS are reflective of the infrastructure types that are the responsibility of the key stakeholders and providers for Oxfordshire, and as such the funding requirement does not reflect the significant private sector funding that will be made in some sectors such as for energy and digital infrastructure.

115. Even within the sectors that the county will provide infrastructure, the source of funding for some of these infrastructure projects will come from the private sector where there is a commercial opportunity. It should also be noted that the funding requirements and gaps identified are reflective of the infrastructure schemes that have been available to be assessed for OxIS Stage 1, and that where further infrastructure schemes are developed to meet needs gaps, additional funding will be required.

116. For example, of the schemes assessed in OxIS Stage 1 to 2040, 38% of the infrastructure schemes have noted an expectation to be funded, or part-funded through Section 106 or Community Infrastructure Levy funds. Further to this, funding policy and opportunities have been constantly transforming over the last year as the country adapts to the pandemic and reacting to the wider impact on society and business, looking to strengthen the economy through a focus on sustainable infrastructure that will increase resilience. There is some uncertainty currently about the continued use of Section 106 or Community Infrastructure Levy funds as the draft Levelling Up Bill suggests a kind of infrastructure levy which approaches a land value capture model. At the time of writing, few details are available.

117. The infrastructure levy could be good[42], switching the contribution from S106 to a flat rate, based on the gross development value of the finished development. Rather than negotiating for everything case-by-case, the developer would just hand over the cash, and the local authority would then pay for everything it needs. Nationally, it is estimated that, in conjunction with building 1.8-2.1 million new homes at suburban densities in green field sites within walkable distances to key train stations, a 20 per cent Infrastructure Levy would raise between £93bn and £116bn.

118. Both sides would win from this arrangement. Instead of having to bargain with developers claiming higher levels of contributions are unviable, councils get more funds to spend on infrastructure to mitigate the congestion problems that come with growth, while developers benefit

[41] Known funding figures have only been included in the summary where they are certain, and as such, there are potential, unallocated, funding pots that could also contribute to these infrastructure projects that have not been included due to their current uncertainty, such as Section 106 funds or competitive bidding funds.

[42] *How can reform ensure the Levelling Up Bill's new Infrastructure Levy is a success*? Centre for Cities, Blog post published on 18 May 2022 by Anthony Breach

from having total up-front certainty about what level of contribution is expected when acquiring land and making planning applications, minimising delays.

Funding sources

119. Government is already working in partnership with Oxfordshire, but further funding of this kind is not certain:

- Investing in the Oxfordshire Housing and Growth Deal, committing to deliver up to 100,000 homes by 2031, with up to £215m of investment, including £60m for affordable houses and £150m over five years for infrastructure. `
- Investing £218m of Housing Infrastructure Fund in Didcot Garden Town, to support up to 13,411 new homes, alongside over £500m of further investment from Homes England since 2010. `
- Providing £142.5m of Local Growth Funding to support local growth in Oxfordshire, which has invested in, for example, Oxford North, a package to improve transport in the north of the city and enable the Oxford North development which will provide business and research space and new homes, with £5.9m Local Growth Funding.
- Recognising significant natural capital assets across the county, including three Areas of Outstanding Natural Beauty, seven Special Areas of Conversations, world class museums and libraries

120. **Transport** - some of the policies identified in the Local Transport and Connectivity Plan will require funding to deliver. However, councils cannot fund these from reserves and are reliant on central government funding for most transport improvements. Alternative funding sources are being sought such as funding bids, developer contributions, partnership working and demand management.

121. **Climate change** - for climate change, while there is uncertainty over the future of core funding for programmes to drive down emissions, there are other options for raising investment in zero-carbon solutions. These include expanding the Low Carbon Hub's model for raising community investment; following West Berkshire Council's example of launching a Green Bond, and developing projects for investment by the Oxfordshire Local Government Pension Fund.

122. **It is disappointing that funding infrastructure and services to support the growth occurring in Oxfordshire does not appear to be a topic of much concern in the strategies and plans reviewed in this booklet. What is needed is a major effort to identify investigation into innovative funding arrangements to address the funding gap[43].**

3.2. Suggestions for ensuring the benefits of integration

3.2.1. General point - integrated development planning

- Over the past several decades, the approach to English development planning has evolved, opportunistically absorbing 'shifting ideologies, legislative vagaries, conflicting perceptions of the future and the influences of global forces' many of which are 'beyond any possibility of local influence[44].' Reform of the planning system is long overdue. In Oxfordshire, we have too many strategies and plans and integration would be helpful and could lead to better plans and 'good growth.' The synchronization and coordination of the strategies and plans and essential associated studies (especially the OGNA) has

[43] The University of Oxford has led the way with innovative financing in partnership with Legal and General. Legal & General entered into a £4bn partnership with the University of Oxford in June 2019, forming Oxford University Development (OUD) in order to provide thousands of new homes for staff and students, as well a number of innovation facilities.

[44] 'Visions for Oxford in the 21st century' published by Oxford Civic Society in 2003. The author of the preface to this report, the President of the Society at the time, Anthony Smith, argued this. It is as true now as it was then.

been difficult to achieve and a more integrated approach may optimize scarce resources and ensure focused attention on the 'elephants in the room' (or at least a common approach).

- The issues raised in Sections 2.2, 2.3 and 2.4 are all within the framework of the Oxfordshire Vision – this needs to be clear. The value of the Oxfordshire Vision as an innovatory concept is very welcome (as is the 'good growth' definition). The Local Industrial Strategy, Local Plans, Oxfordshire 2050 Plan, Local Transport and Connectivity Plan, Oxfordshire Infrastructure Strategy and other plans and strategies are all describing ways in which the Vision can be achieved. This common purpose should be reflected in common approaches and integrated thinking about the interrelationships between the economic, environmental and social components of the Vision. The Oxford Civic Society is not convinced that an adequate level of integration has been achieved and looks to organizational and institutional changes that could encourage this in the longer term. The major integration challenge lies in achieving alignment of development and infrastructure proposals on the ground – the investment programmes.
- The Oxfordshire Growth Needs Assessment underpinning all the plans and strategies is currently not credible. The review of the OGNA is very urgent if the plans and strategies described in this booklet are to be integrated effectively.

3.2.2. Scale of Growth

- The assumptions and data underpinning the current Oxfordshire Growth Needs Assessment need to be reviewed.
- Following any agreed revisions to the Oxfordshire Growth Needs Assessment, the 3 trajectories need to be reviewed, in particular for consistency with climate change / environmental and social / inclusivity priorities and for consistency with the Oxfordshire Vision overall.
- In particular, the longer-term growth implications of the Local Industrial Strategy need to be aligned with the growth implications of other matters (including climate change, environmental management, inclusivity, infrastructure capacity, public and private funding availability and institutional capacity to manage growth).
- It is disappointing that funding infrastructure and services to support the growth occurring in Oxfordshire does not appear to be a topic of much concern in the strategies and plans reviewed in this booklet. What is needed is a major investigation into innovative funding arrangements to address the funding gap.
- A decision is needed on which version of the post pandemic future is most likely to occur, as captured by the three post-Covid scenarios presented in the OGNA addendum on the pandemic. The scenarios, which look ahead to 2050, cover a range of feasible and contrasting behavioural changes as a result of the pandemic.

3.2.3. Pace of Growth

- To a great extent the pace of growth is dictated by the pace of growth of private sector investment.
- But it will also need to be commensurate with the capacity (skills and funding) to undertake necessary public sector investments:
    - Organizational and institutional arrangements are needed to ensure the management of growth (including continued strategic planning, with more emphasis on integrated development planning).
    - Innovation in public sector funding is urgently needed.
- The investment programmes for the Local Transport and Connectivity Plan, and Oxfordshire Infrastructure Strategy will need to be aligned, along with the phasing of spatial distribution of employment and housing in the Oxfordshire 2050 Plan and subsequent Local Plan revisions. This likely to take a few more years, especially with the timing of the second part of the LTCP.

3.2.4. Distribution of growth

- Spatial distribution options cannot be evaluated without knowing the scale of the development growth to be accommodated.
- Spatial distribution should be determined by economic considerations and climate change / environmental and social considerations <u>all having equal weight</u>.

- The ratio of employment and housing provision needs to be considered (by district / city and/or by spatial options) with reduction of commuting / reduction of car travel and enhanced housing affordability the main aims.
- The predominance of the Knowledge Spine as a magnet for private sector investment should be recognised and further growth in the Spine area assessed from a climate change / environmental and social / inclusivity point of view.
- Considerations of the distribution of growth should also include detailed assessment of the availability of basic infrastructure and the scope for extending existing infrastructure provision. (Cost may be a significant factor in determining the distribution of growth).
- Current gaps in infrastructure provision to 2040 need to be explained in detail (perhaps in Stage 2 of the Oxfordshire Infrastructure Strategy, along with projections of investment needs to 2050). Gaps may need to be closed before further development is serviced.
- Analysis of recent trends has shown that, as a result of employment growth accelerating relative to the supply of housing, net commuting into the Oxfordshire has more than doubled over the past decade. This means more people are commuting – and commuting further, typically using private transport - to work in Oxfordshire, exacerbating congestion and environmental effects.

3.2.5. Further public consultations

- The current OGNA needs to be reviewed. This needs to be a public review with opportunities for discussion (there is no consensus on growth – it is a very divisive topic and the plan will be a better plan with public support behind it).
- It is suggested that to avoid confusion and exhaustion the Oxfordshire 2050 Regulation 19 consultation includes the inputs from the Local Transport and Connectivity Plan, Oxfordshire Infrastructure Strategy and other relevant strategies and plans – in one succinct consultation document. This would also clarify how far the strategies and plans are integrated. As it may not be legally valid to publish the Reg 19 OxPlan consultation in a multi-sourced form it could be that the statutory version could be accompanied by a more user-friendly guide which summarised the main features of OxPlan incorporating complementary additions.
- Consultation meetings could include representatives of the key plans and strategies who could explain how their plan or strategy is relevant to national and local policy including the Oxfordshire Vision and is complementary to the other plans and strategies. This would be very helpful in building a rounded understanding of the future of Oxfordshire.
- During implementation of the Oxfordshire 2050 Plan a Citizens Assembly type of organization could report to the Future Oxfordshire Partnership Scrutiny Committee, supporting and strengthening the monitoring and evaluation process.

3.2.6. Governance

- A continuous strategic planning process is needed (currently the Oxfordshire 2050 Plan is a one-off plan requested by government). The Oxfordshire 2050 Plan will need to be rolled forward, with updates being well synchronized with Local Plan and Local Transport and Connectivity Plan updates.
- The continuous strategic planning process should use integrated economic, climate change / environmental / social / inclusivity teams.
- An office of public sector funding innovation is needed – perhaps in association with other local authorities. This office could report to the Future Oxfordshire Partnership, effectively being another Sub-group.
- The strategic planning process and the interests of integration would be served by the development of a set of performance indicators geared to the delivery of the Oxfordshire Vision outcomes for use in monitoring the Oxfordshire Plan and associated plans and strategies.

IG July 2022

ANNEXES

ANNEX 1: Oxfordshire Vision

Good growth

The approved Oxfordshire Vision is more specific and its good growth definition has nine criteria of good growth. Good growth in Oxfordshire will:

- **Be clean and green**, placing the county at the leading edge of UK and global de-carbonisation efforts by maximising all opportunities to significantly reduce Oxfordshire's carbon footprint, and increasing natural capital across the county.
- **Be sustainable**, focusing development in ways that enhance quality of place and at locations which enable people to live and work nearby, improving digital connectivity and avoiding unnecessary travel in the first instance, but using opportunities to increase movement by sustainable and active modes of travel when needed.
- **Embrace innovation** based on our technology sectors and knowledge-intensive activity, and develop new innovative solutions for working, learning, mobility, health care, resource management, sustainable design and improved public services.
- **Be healthy** and inclusive, with all development addressing inequalities and contributing positively to the overall health and wellbeing of Oxfordshire's communities, environment and economy.
- **Facilitate environmental improvements** and make efficient use of Oxfordshire's natural resources and land.
- **Enhance and expand access to the county's internationally significant historic environment and cultural and heritage assets.**
- **Support diverse, accessible employment**, generating a highly productive and inclusive economy based on our world-class research, innovation and technology.
- **Expect high-quality development** which will have a positive impact on communities in terms of design, energy and water efficiency and public realm, utilises low-impact building and construction methods and materials, and is properly supported by the necessary infrastructure including excellent digital connectivity. Everything we build or design in Oxfordshire will be fit for purpose in the world of 2050, respond to different circumstances, contribute to Oxfordshire's sense of distinctiveness and rich variety, and support connected communities.
- **Build resilience to change**, with growth planned in ways that: build on strengths and assets to support communities during periods of change; support economic diversity and can accommodate changes in technology; recognise changes in the way that people live and work and changing demographics; and respond to global impacts, particularly from climate and economic changes.

Guiding principles

The eleven guiding principles mirror the expected outcomes and principles of good growth and articulate how Oxfordshire will change as a place over the period to 2050. Individual guiding principles have not been weighted: the principles form an inter-related set of equally important ground rules.

The Vision recognises that positive change will evolve and take time. Some of the Vision is beyond the direct control of Oxfordshire's stakeholders. While priorities are unlikely to alter over the short to medium-term[45], the approach needs to be resilient to change overtime. Although there is a high level of uncertainty over a 30-year planning period, particularly around external factors including climate and technological change, new opportunities to align environmental, social and

[45] See especially Section 2.3.2 on Oxfordshire's Local Plans

economic needs to deliver sustainable development in different and better ways will emerge. This will position Oxfordshire to challenge and capitalise on the scope for innovation over the longer-term.

ANNEX 2: Current Local Plans

Local Plans and Employment

Table 3: Summary of Strategic Employment Allocations in Local Plans

Adopted Local Plan	New Strategic Employment Sites – Total Allocation	Spatial Allocations Summary
Cherwell Local Plan 2011-2031 Part 1 2015*	212 hectares in addition to high value employment areas	• Allocation of large employment sites in Bicester (138.5 hectares), Banbury (61 hectares) and former RAF Upper Heyford (12 hectares) • High Value Employment Areas at Langford Lane / Oxford Technology Park / London-Oxford Airport and at Begbroke Science Park
Oxford Local Plan 2036	66 hectares (previous allocation of Core Oxford Strategy 2026)	• No new strategic employment sites are identified in the Local Plan • Provision of 9 hectares of employment land at Northern Gateway and 5 hectares in West End • Total of 52 hectares from sites and allocated housing sites • Protection of 174 hectares of existing employment sites**
South Oxfordshire Local Plan 2035	31 hectares	• Intensification of key sites including Culham Science Centre (7 hectares) and Oxford Science Park extension at Grenoble Road (10 hectares) • Key strategic sites at Berinsfield (5 hectares) and Chalgrove (5 hectares) as part of mixed-use sites as well as sites at Southmead (3 hectares) and in Wallingford (1 hectare).
Vale White Horse Local Plan 2031 Part 1 2016*	194 hectares	• Key strategic sites include Harwell Campus (128 hectares), Milton Park (28 hectares), Didcot A Power Station (29 hectares), Monks Farm (9 hectares) and Faringdon (3 hectares)
West Oxfordshire Local Plan 2031	69 hectares	• Key mixed-use sites where employment has been allocated includes a 'campus style' science park at Salt Cross Garden village (40 hectares) alongside allocations at Witney (18 hectares), Carterton (6 hectares) and Chipping Norton (5 hectares).

Notes:
***No additional strategic employment allocations are included in the Cherwell Local Plan Partial Review of Vale of White Horse Local Plan Part 2**
****Data informed by Oxford City Council Annual Monitoring Report**

Source: Oxford Infrastructure Strategy (OXIS) Stage 1 (2021-2040) – Technical Report

Table 4: Remaining Approximate Allocated Strategic Floorspace

Remaining Approximate Allocated Strategic Employment Floorspace still to be delivered by current Local Plans			
OXIS Town and Surrounds		**OXIS and Rural Communities**	
Oxford City	66 hectares	Berinsfield	5 hectares
Abingdon and surrounds	7 hectares	Chalgrove	5 hectares
Banbury	29 hectares	Eynsham & Long Hanborough	40 hectares
Bicester	128 hectares	South Cherwell Area & Woodstock	8 hectares
Carterton	6 hectares	Upper Heyford	13 hectares
Chipping Norton	5 hectares	Faringdon and Shrivenham	3 hectares
Didcot and Wallingford	190 hectares	Bayswater Brook	No strategic allocations
Wantage and Grove	6 hectares		
Witney	18 hectares		

Source: Oxford Infrastructure Strategy (OXIS) Stage 1 (2021-2040) – Technical Report

Local Plans and Housing

Table 5: Current Local Plan housing provision commitments and distribution strategies

District Local Plan	Housing provision	Distribution of housing
Cherwell Local Plan (Part 1) 2011-2031	27,240	• Prioritises growth in established towns and villages • Limits growth in rural areas • Focus of proposed growth in and around Bicester and Banbury
Cherwell Local Plan (Part 2) 2011-2031 Partial Review		• Prioritises apportioned growth in locations well connected to Oxford along the A44 and A4260 corridors in the south Cherwell area north from Oxford.
Oxford Local Plan 2016-2036	10,884[46]	• Focuses on housing growth with no new employment site allocations. • Focuses on intensifying development on previously developed land • Supports the role and function of Oxford's city centre, district centres and transport nodes as the most sustainable locations for new development
South Oxfordshire Local Plan 2011-2035	30,056[47]	• Allocation of a strong network of vibrant settlements building upon the existing settlement hierarchy. • Strategy focuses development in Didcot Garden Town as well as settlements at Culham, Chalgrove and Berinsfield Garden Village. • Apportioned growth predominantly at the Oxford City boundary including at Northfield, Bayswater Brook and south of Grenoble Road
Vale of White Horse Local Plan (Part 1) 2011-2031	22,760	• Reinforces service centre roles of the main settlements whilst promoting thriving villages and rural communities. • Majority of strategic growth allocated at the periphery of Wantage, west of Didcot and north of Abingdon-on-Thames • Growth also allocated within villages along the A420 corridor including at Faringdon, Kingston Bagpuize and Shrivenham.
Vale of White Horse Local Plan (Part 2) 2011-2031		• Allocates apportioned growth in Abingdon-on-Thames and Oxford Fringe Sub-Area (e.g., at Dalton Barracks and Shippon alongside the larger villages of East Hanney and Marcham)
West Oxfordshire Local Plan 2011-2031	15,950	• The strategy steers a significant proportion of future development into the Witney, Carterton and Chipping Norton Sub-Areas, with a particular focus on these three main service centres. • A strategic urban extension of Eynsham (e.g., a garden village alongside growth of Woodstock).
TOTAL	**106,890**	

Source: District and City Council Local Plans

Table 6: Local Plan housing commitment completions to date

District Local Plan	Housing completions 2011/12 – 2019/20	Housing to be completed 2020-2031
Cherwell District Council	8,332	18,908
South Oxfordshire District Council	7,196	22,860
Vale of White Horse District Council	9,100	13,660
West Oxfordshire Local Plan 2031	4,400	11,550

[46] Covers the planning period between 2016-2036
[47] Covers the planning period between 2011-2035

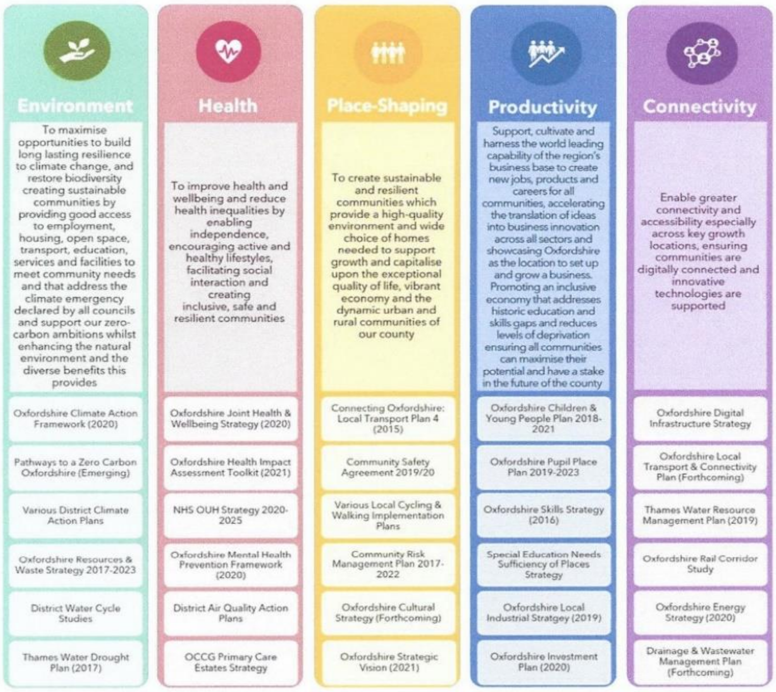
	Housing completions 2016/7 - 2019/20	Housing to be completed 2020-2036
Oxford City Council	1,984	11,550
TOTALS		**75,878**

Source: OXIS Stage 1 and Oxford Civic Society calculations

ANNEX 3: Oxford Infrastructure Strategy

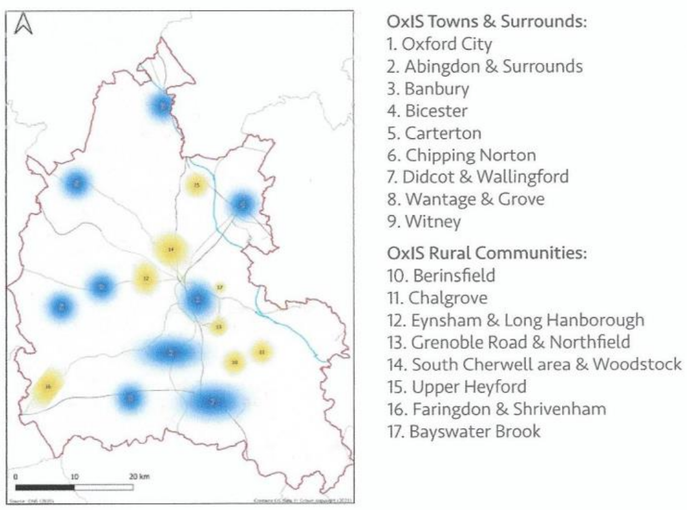
Key themes

Figure 3: Oxfordshire Infrastructure Strategy key themes



Source: Oxfordshire Infrastructure Strategy

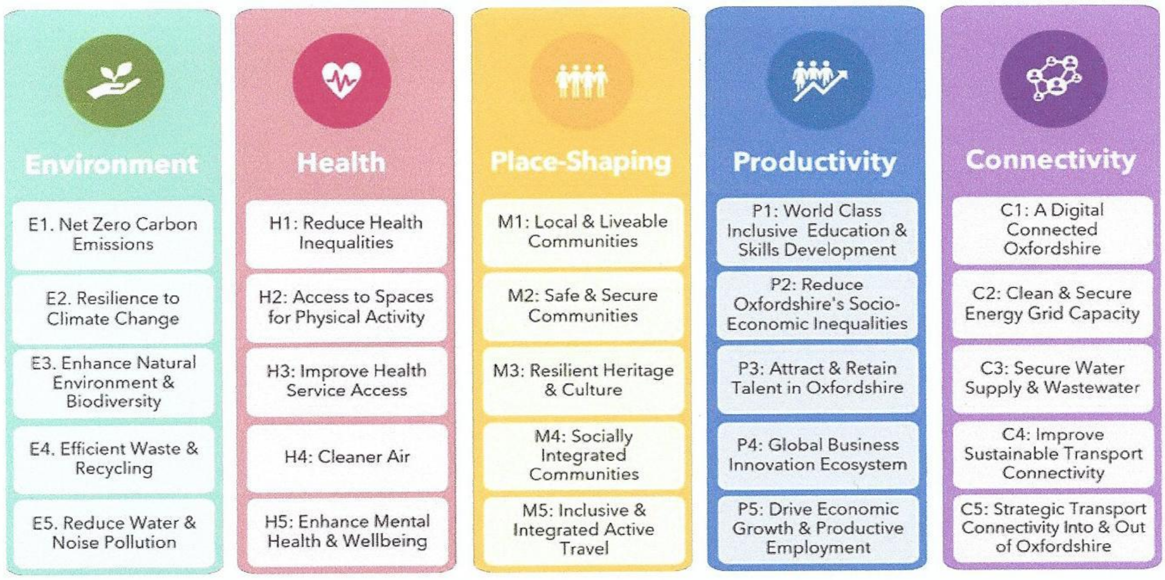
Figure 4: Oxfordshire Infrastructure Strategy – Focus Areas



Source: Oxfordshire Infrastructure Strategy

Key sub-themes

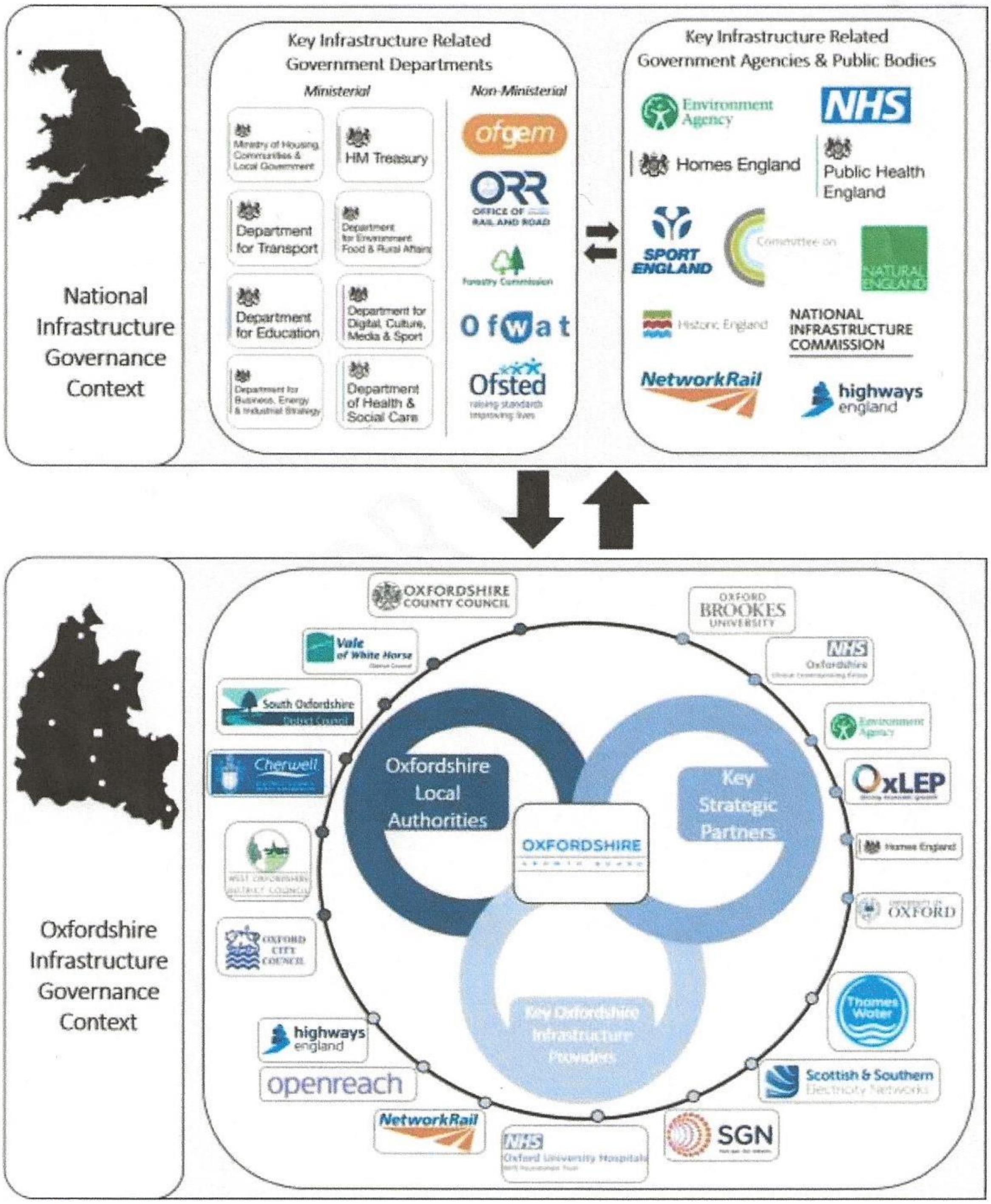
Figure 5: Oxfordshire Infrastructure Strategy: outcome led sub-themes



Source: Oxfordshire Infrastructure Strategy

ANNEX 4: National and Oxfordshire Policy Context

Figure 6: National and Oxfordshire Policy Context



Source: Oxfordshire Infrastructure Strategy (OxIS) Stage 1 (2021-2040) - Technical Report, City Science July 2021

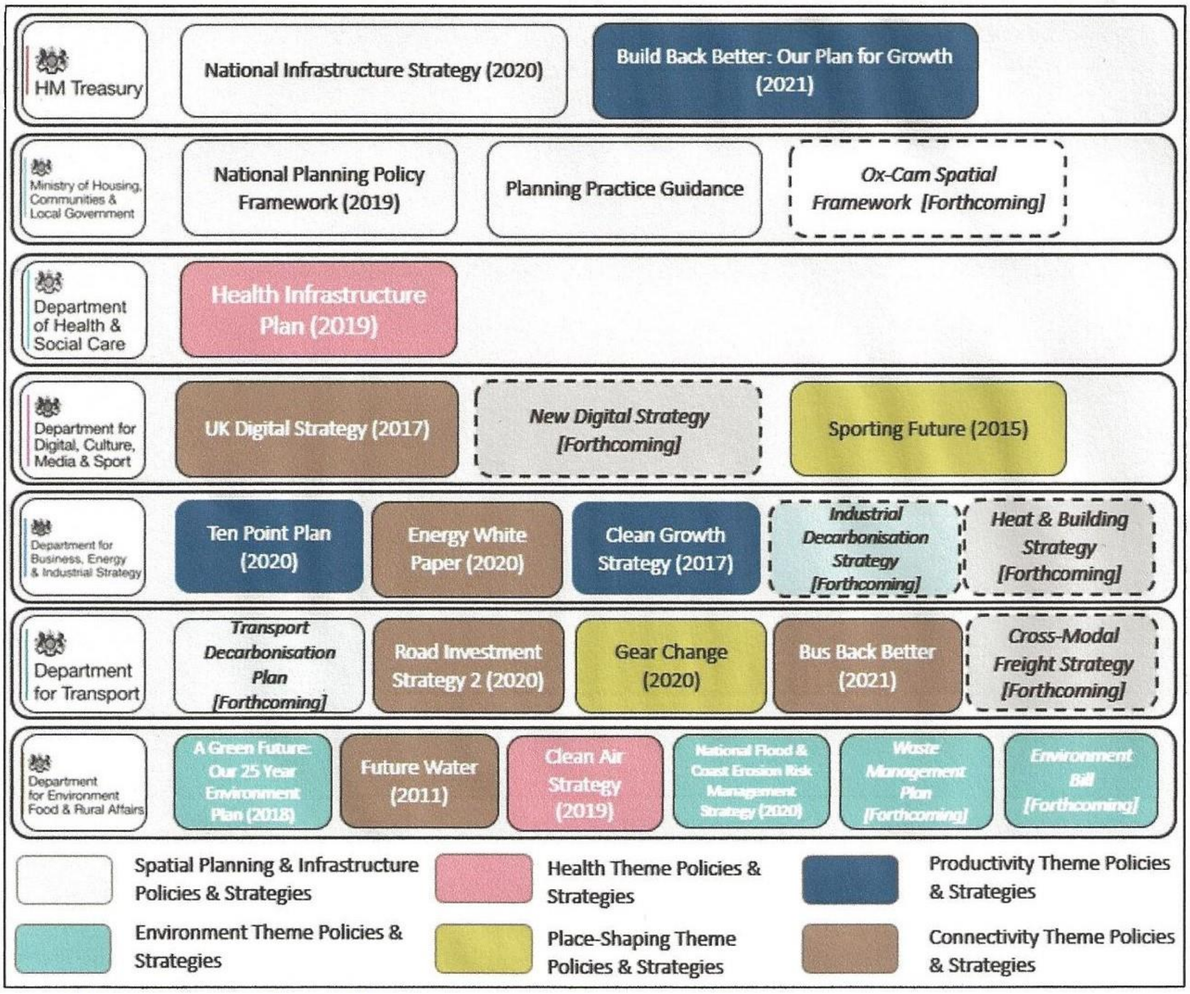
Role of UK Government & Agencies

The UK Government lays the obligatory legislative framework for infrastructure planning. This is complemented by departmental specific key national policies and strategies. National government agencies and public bodies also play a key role in the infrastructure governance, planning and delivery process. This includes bodies such as the NHS, Homes England, Network Rail, Public Health England and Forestry England.

Key National Policy Framework

An overview of national policies and strategies impacting the planning of infrastructure and land use, categorised by government department and OxIS Theme, are outlined in 7.

Figure 7: National Policy and Strategy Framework

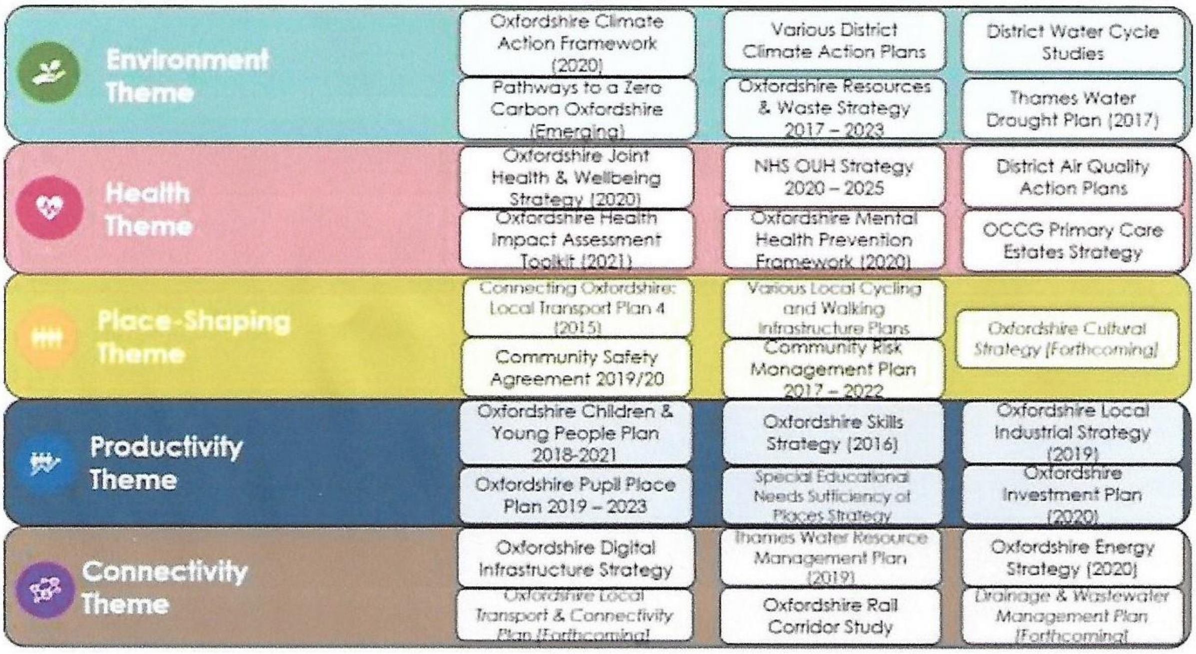


Source: Oxfordshire Infrastructure Strategy (OxIS) Stage 1 (2021-2040) - Technical Report, City Science July 2021

Oxfordshire Policy Framework

Figure 8 outlines key policies and strategies produced by the Future Oxfordshire Partnership and the five District Councils related to the future growth trajectory. This includes the Strategic Vision, the Oxfordshire Plan 2050 and the Local Plans as well as the associated IDPs. It additionally outlines key policies and strategies organised by the five OxIS Themes produced by OCC and the five District Councils as well as key external Oxford Growth Board partners (such as OxLEP, NHS OUH and Thames Water).

Figure 8: Oxfordshire Key Policies (by theme of draft OXIS Stage 1)



Source: Oxfordshire Infrastructure Strategy (OxIS) Stage 1 (2021-2040) - Technical Report, City Science July 2021

About the Oxfordshire Futures series

This series of documents was launched in 2014 by Oxford Civic Society. At the time we stated that ‘Central Oxfordshire stands at a crossroads in history. The region is poised either to become one of the key drivers of the UK’s knowledge economy or to resist change and growth and stifle its own potential.’ Little has changed: managing growth remains complex and controversial and the need to manage it ‘smartly’ is as great as ever. The series is targeted at local decision-makers, business and university leaders and others who have a role to play in shaping Oxfordshire’s future.

Read more on the Oxfordshire Futures website and download the reports free of charge: www.oxfordfutures.org.uk/

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