OXFORDSHIRE COUNTY COUNCIL

Notice of a Meeting

Performance & Corporate Services Overview & Scrutiny Committee

Friday, 12 June 2026 at 10.00 am

Room 2&3 - County Hall, New Road, Oxford OX1 1ND

These proceedings are open to the public

If you wish to view proceedings, please click on this Live Stream Link.
However, that will not allow you to participate in the meeting.

Membership

Chair:	Councillor Glynis Phillips		
Deputy Chair:	Councillor Ian Middleton		
Councillors:	Brad Baines	Tom Greenaway	Liam Walker
	Ron Batstone	Kieron Mallon	
	Will Boucher-Giles	John Shiri	

Date of Next Meeting: *18 September 2026*

For more information about this Committee please contact:

Committee Officer: *Scrutiny Team*
Email: *E-Mail: scrutiny@oxfordshire.gov.uk*

Martin Reeves
Chief Executive

June 2026

What does this Committee review or scrutinise?

The purpose of the Performance and Corporate Services Overview and Scrutiny Committiee is (i) To review and scrutinise the performance of the Council and to provide a focused review of: (a) Corporate performance and directorate performance and financial reporting (b) Budget scrutiny (ii) To monitor the performance of the Council by means of effective key performance indicators, review of key action plans and obligations and through direct access to service managers, Cabinet Members and partners; (iii) To exercise the statutory right to call-in, for reconsideration, decisions made but not yet implemented by or on behalf of the Cabinet;

How can I have my say?

We welcome the views of the community on any issues in relation to the responsibilities of this Committee. Members of the public may ask to speak on any item on the agenda or may suggest matters which they would like the Committee to look at. **Requests to speak must be submitted to the Committee Officer below no later than 9 am 4 working day before the date of the meeting.**

About the County Council

The Oxfordshire County Council is made up of 69 councillors who are democratically elected every four years. The Council provides a range of services to Oxfordshire's 763,200 residents.

These include:

schools	social & health care	libraries and museums
the fire service	roads	trading standards
land use	transport planning	waste management

Each year the Council manages £1.2 billion of public money in providing these services. Most decisions are taken by a Cabinet of 10 Councillors, which makes decisions about service priorities and spending. Some decisions will now be delegated to individual members of the Cabinet.

About Scrutiny

Scrutiny is about:

- Providing a challenge to the Cabinet
- Examining how well the Cabinet and the Authority are performing
- Influencing the Cabinet on decisions that affect local people
- Helping the Cabinet to develop Council policies
- Representing the community in Council decision making
- Promoting joined up working across the authority's work and with partners

Scrutiny is NOT about:

- Making day to day service decisions
- Investigating individual complaints.

What does this Committee do?

The Committee meets up to 4 times a year or more. It develops a work programme, which lists the issues it plans to investigate. These investigations can include whole committee investigations undertaken during the meeting, or reviews by a panel of members doing research and talking to lots of people outside of the meeting. Once an investigation is completed the Committee provides its advice to the Cabinet, the full Council or other scrutiny committees. Meetings are open to the public and all reports are available to the public unless exempt or confidential, when the items would be considered in closed session.

If you have any special requirements (such as a large print version of these papers or special access facilities) please contact the officer named on the front page, giving as much notice as possible before the meeting

A hearing loop is available at County Hall.

AGENDA

1. Apologies for Absence and Temporary Appointments

To receive any apologies for absence and temporary appointments.

2. Declaration of Interests

See guidance note on the back page.

3. Minutes (Pages 9 - 22)

The Committee is recommended to **APPROVE** the minutes of the meetings held on 17 April 2026 and 12 May 2026, and to receive information arising from them.

4. Petitions and Public Address

Members of the public who wish to speak on an item on the agenda at this meeting, or present a petition, can attend the meeting in person or ‘virtually’ through an online connection.

Requests to present a petition or to speak must be submitted no later than 9am three working days before the meeting, i.e. 09/06/2026.

Requests should be submitted to the Scrutiny Officer at scrutiny@oxfordshire.gov.uk.

If you are speaking ‘virtually’, you may submit a written statement of your presentation to ensure that if the technology fails, then your views can still be taken into account. A written copy of your statement can be provided no later than 9am on the day of the meeting. Written submissions should be no longer than 1 A4 sheet.

5. Business Management and Monitoring Report (focusing on the Fire and Rescue Service) (Pages 23 - 28)

Cllr Fawcett, Cabinet Member for Resources, and Cllr Levy, Cabinet Member for Finance, Property and Transformation, Ian Dyson, Director of Financial and Commercial Services, Rob MacDougall, Chief Fire Officer and Director of Community Safety, Kathy Wilcox, Head of Corporate Finance, and Verity Royle, Planning and Reporting Manager have been invited to present a report on the Business Management and Monitoring Report, with a particular focus on the Fire and Rescue Service.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

6. Commercial Strategy Update (Pages 29 - 42)

Cllr Levy, Cabinet Member for Finance, Property and Transformation, Ian Dyson, Director of Financial and Commercial Services, and Richard Scarlett, Head of Procurement and Commercial have been invited to present an update report on the progress of the Council’s Commercial Strategy.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

7. Shaping Oxfordshire's Future Economy (Pages 43 - 184)

Cllr Gordon, Cabinet Member for Environment and Economy, Robin Rogers, Director of Economy and Place, and Nicholas Glover, Head of Future Economy have been invited to present an update report on Shaping Oxfordshire's Future Economy.

The Committee is asked to consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet arising therefrom.

8. Committee Forward Work Plan (Pages 185 - 188)

The Committee is recommended to **AGREE** its work programme for forthcoming meetings**,** having heard any changes from previous iterations, and taking account of the Cabinet Forward Plan and of the Budget Management Monitoring Report.

The latest publication of the Cabinet Forward Plan can be found here:

https://mycouncil.oxfordshire.gov.uk/mgListPlanItems.aspx?PlanId=484&RP=115

9. Responses to Scrutiny Recommendations (Pages 189 - 202)

Attached are the Cabinet responses to the Performance and Corporate Services Overview and Scrutiny Committee reports on:

- The Business Management and Monitoring Report
- Parking Permits
- Draft Social Value Policy

The Committee is asked to **NOTE** the responses.

Councillors declaring interests

General duty
You must declare any disclosable pecuniary interests when the meeting reaches the item on the agenda headed 'Declarations of Interest' or as soon as it becomes apparent to you.

What is a disclosable pecuniary interest?
Disclosable pecuniary interests relate to your employment; sponsorship (i.e. payment for expenses incurred by you in carrying out your duties as a councillor or towards your election expenses); contracts; land in the Council's area; licenses for land in the Council's area; corporate tenancies; and securities. These declarations must be recorded in each councillor's Register of Interests which is publicly available on the Council's website.

Disclosable pecuniary interests that must be declared are not only those of the member her or himself but also those member's spouse, civil partner or person they are living with as husband or wife or as if they were civil partners.

Declaring an interest
Where any matter disclosed in your Register of Interests is being considered at a meeting, you must declare that you have an interest. You should also disclose the nature as well as the existence of the interest. If you have a disclosable pecuniary interest, after having declared it at the meeting you must not participate in discussion or voting on the item and must withdraw from the meeting whilst the matter is discussed.

Members' Code of Conduct and public perception
Even if you do not have a disclosable pecuniary interest in a matter, the Members' Code of Conduct says that a member 'must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself' and that 'you must not place yourself in situations where your honesty and integrity may be questioned'.

Members Code – Other registrable interests
Where a matter arises at a meeting which directly relates to the financial interest or wellbeing of one of your other registerable interests then you must declare an interest. You must not participate in discussion or voting on the item and you must withdraw from the meeting whilst the matter is discussed.

Wellbeing can be described as a condition of contentedness, healthiness and happiness; anything that could be said to affect a person's quality of life, either positively or negatively, is likely to affect their wellbeing.
Other registrable interests include:

a) Any unpaid directorships
b) Any body of which you are a member or are in a position of general control or management and to which you are nominated or appointed by your authority.

c) Any body (i) exercising functions of a public nature (ii) directed to charitable purposes or (iii) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union) of which you are a member or in a position of general control or management.

Members Code – Non-registrable interests
Where a matter arises at a meeting which directly relates to your financial interest or wellbeing (and does not fall under disclosable pecuniary interests), or the financial interest or wellbeing of a relative or close associate, you must declare the interest.

Where a matter arises at a meeting which affects your own financial interest or wellbeing, a financial interest or wellbeing of a relative or close associate or a financial interest or wellbeing of a body included under other registrable interests, then you must declare the interest.

In order to determine whether you can remain in the meeting after disclosing your interest the following test should be applied:
Where a matter affects the financial interest or well-being:

a) to a greater extent than it affects the financial interests of the majority of inhabitants of the ward affected by the decision and;
b) a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest.

You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation.

This page is intentionally left blank

OXFORDSHIRE COUNTY COUNCIL

PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

MINUTES of the meeting held on Friday, 17 April 2026 commencing at 10.02 am and finishing at 1.15 pm.

Present:

Voting Members:	Councillor Glynis Phillips - in the Chair Councillor Ian Middleton (Deputy Chair) Councillor Brad Baines Councillor Tom Greenaway Councillor Kieron Mallon Councillor John Shiri Councillor Roz Smith Councillor Ron Batstone
Other Members in Attendance:	Councillor Tim Bearder, Cabinet Member for Adults Councillor Liz Leffman, Leader of the Council Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation
Officers:	Susannah Wintersgill, Director of Public Affairs, Policy and Partnerships Tom Parsons, Head of Customer Experience Clare Martin, Strategic Improvement Lead Richard Merritt, Operational Manager Contact Oxfordshire Vic Kurzeja, Director of Property and Assets James Cater, National Management Trainee Lorna Baxter, Deputy Chief Executive and S.151 Officer Karen Fuller, Director of Adult Social Services Victoria Baran, Deputy Director of Adult Social Care Stephen Rowles, Strategic Finance Business Partner Isabel Rockingham, Head of Joint Commissioning HC Age Well Kathy Wilcox, Head of Corporate Finance

The Council considered the matters, reports and recommendations contained or referred to in the agenda for the meeting and decided as set out below. Except insofar as otherwise specified, the reasons for the decisions are contained in the agenda and reports, copies of which are attached to the signed Minutes.

10/26 APOLOGIES FOR ABSENCE AND TEMPORARY APPOINTMENTS
(Agenda No. 1)

Apologies were received from the following:

- Cllr Boucher-Giles

- Cllr Ley (for whom Cllr Batstone was substituting)

11/26 DECLARATION OF INTERESTS
(Agenda No. 2)

There were none.

12/26 MINUTES
(Agenda No. 3)

The minutes of the meeting on the 16 January 2026 were **AGREED** as a true and accurate record subject to the following amendment:

- Strengthening reference to the Committee's wish to see the options appraisal undertaken in relation to the Watlington Relief Road.

13/26 PETITIONS AND PUBLIC ADDRESS
(Agenda No. 4)

The Scrutiny Officer read out a statement sent through from the Chair of Shirburn Parish Meeting, Mr Parker in relation to the Watlington Relief Road. The issues raised concerned the status of the planning consent and budget implications arising, the absence of a Cabinet report relating to the item, and the scheme's designation as an 'active travel' scheme.

The Committee **NOTED** the address.

14/26 CUSTOMER SERVICE CENTRE UPDATE
(Agenda No. 5)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Susannah Wintersgill, Director of Public Affairs, Policy and Partnerships, Tom Parsons, Head of Customer Experience, Clare Martin, Strategic Improvement Lead, and Richard Merritt, Operational Manager Contact Oxfordshire attended the committee to present an update report on the Customer Service Centre.

Councillor Levy introduced the Customer Experience service update. The Council had prioritised enabling residents to contact the authority through channels that suited them, supported by investment in online and telephone systems. Officers introduced the customer experience team and the redesigned had gone live on 1 February, with management layers streamlined and additional capacity added in workforce planning and complaints to improve response times and learning. The service had been structured around customer feedback (complaints/FOI/MP enquiries), a contact centre covering communities and neighbourhoods (excluding adult social care), a dedicated social and health care 'front door' for adult social care, and a small strategic improvements function focused on customer journeys and working with Zoom. A major demand spike linked to the temporary congestion charge was highlighted, which included handling around 15,000 emails handled in six weeks. The focus had been on reducing avoidable 'chase' calls and switchboard misrouting, and that new Zoom reporting had provided better insight than low response-rate satisfaction surveys, alongside reduced waiting times.

In response to the report received and introduction given, members of the committee began their questioning.

Members sought to know how AI had been used to help answer the high volume of enquiries, and what impact this had had on staff wellbeing. Officers said AI functionality within the new Zoom platform had surfaced relevant information from the council's knowledge base (including web content and training materials) to advisers during calls, helping them provide faster and more accurate answers. AI had also been used to analyse call sentiment and engagement across all interactions, and that virtual-agent technology had supported intent-based routing and reduced switchboard demand and customer waiting time. On wellbeing, officers said the peak period had strengthened teamwork and morale, with staff working flexibly to manage demand, and they said a positive workplace culture had been promoted.

Clarification of the service level targets (SLAs), which issues had affected achievement, and whether there had been major drivers of contact other than the temporary congestion charge. Officers said SLAs had been set as the proportion of calls answered within a specified time and had been tailored by service to reflect average call length, rather than applying a single '80/20' industry standard. Adult social care calls were typically lengthy (often around 40 minutes and sometimes significantly longer), so the SLA had been set at 70% answered within five minutes, whereas more transactional lines (including general enquiries) had operated to shorter SLAs and generally performed strongly. Performance had varied predictably by day and time and could not be fully controlled because customer calling patterns clustered. On other drivers, the overall service-level figure had been pulled down primarily by adult social care telephony due to call complexity, safeguarding contacts and the need for strengths-based conversations at the start of care pathways; if adult social care was separated out, performance for other teams would have been higher.

Members sought to know what feedback the service had received from staff when leaving the team (either leaving the council or moving to other roles), whether turnover created operational challenges, how these were managed, and whether the service wanted people to stay. Officers viewed progression from the contact centre into other council roles as a positive outcome, and that most leavers moved internally (notably into Adult Social Care roles such as commissioning and brokerage, and into Highways), reflecting the transferable knowledge gained in the contact centre. Turnover could create pressure because vacancies could arise quickly and some service areas were complex to learn, but they had managed this through maintaining a pool of casual staff. The team benefited from a wide age range and flexible working arrangements, including apprenticeships and roles for disabled staff.

Members asked about the level of preventative activity to reduce call volumes. Officers explained calls had been reduced by using the Zoom Virtual Agent to route customers correctly first time and to answer routine questions without adviser intervention. Traditional push-button phone menu had been replaced with intent-based voice routing, so callers could describe what they needed in their own words, which had reduced switchboard 'general enquiries' demand and avoided doublehandling. This approach had also reduced time spent navigating phone menus by around half. In addition, web chat bots had been deployed on key webpages (including the congestion charge and school admissions) to provide answers drawn from the council’s knowledge base and website content, with an option to transfer quickly to a person where required. Officers added that they had used call transcripts and contact data to identify common queries, refine the bots, and feed back issues with online systems to service owners to reduce avoidable contact.

Further information was sought on the impact the introduction of AI agents had had on the customer experience team, including whether staff might have been concerned about jobs being replaced, and he also raised the need for transparency and for considering environmental impacts. Officers said they had involved staff in developing the AI tools and had been clear that they were intended to deflect routine contact, but that this would have changed the role rather than removed it, by enabling advisers to focus on more complex cases and customers who needed more support. Staff had been re-skilled as transactional queries were handled through virtual agents, and that the system had helped advisers by surfacing relevant guidance during calls and by providing better insight into why customers contacted the council. Customers could to speak to a person, and that they would have continued to monitor feedback and performance data but officers acknowledged the need to be explicit to ensure that customers were speaking to a virtual agent.

The Committee pressed further on how the council had ensured transparency given that voice bots could sound realistic. It was suggested that virtual agents should begin by stating that they were not a real person and explaining how to reach a human adviser. In response, officers said that, for the congestion charge voice bot, callers had already come through an automated system and the service had announced that the interaction was with a virtual agent. This approach would be the model for future virtual agents, and confirmed that customers could ask to speak to a person and would be transferred through without challenge.

Members sought to know what feedback there was on customer satisfaction with AI bot implementation. It had been early days but there had been little negative feedback, with staff reporting generally positive comments. Officers had reviewed transcripts and early data, and significant internal and user-group testing had been undertaken to ensure the system worked for people with different needs and to avoid callers becoming trapped in loops.

Finally, members asked what support was available for residents who came into County Hall for support, and where the ‘front door’ would be located when the council left County Hall before moving into Speedwell House. Officers said the County Hall reception team had been part of the contact centre and had supported residents and visitors in person for the services delivered by the contact centre, with staff presence available each day. The contact centre did not cover every council service, there had been no general appointment system, and County Hall had not been designed for confidential ‘walk-in’ conversations, which had created challenges when residents sought support for services outside the contact centre. The intention for Speedwell House had been to provide a more suitable resident hub with appropriate privacy, and they had explored options such as a video kiosk to enable residents to speak to other council teams remotely.

The Committee **AGREED** to make the following recommendation to Cabinet:

- That the Cabinet ensures that there is full transparency over whether a caller to the Council is interacting with an AI bot or a human

The Committee also **AGREED** to request the following additional information:

- Performance stats broken across the different CSC teams
- An estimate of how much time have the Council has given back to Oxfordshire residents because the improvements made have reduced the time they are left waiting on hold
- Details of the sustainability impacts of the use of AI bots
- A breakdown of the things that people seek help for from the CSC when they physically come into County Hall

15/26 DEVOLUTION UPDATE

(Agenda No. 6)

The Committee were provided the Devolution Update by Cllr Leffman, Kim Sawyer, Programme Director for Devolution, having been called away to an urgent meeting.

Cllr Leffman noted that there had been limited progress since the last update to the Committee because the matter remained under consideration by the Secretary of State. Thames Valley leaders had submitted an expression of interest to the Minister for Devolution for a Foundation Strategic Authority (FSA), although they had preferred to pursue a Mayoral Strategic Authority (MSA). She explained that ministers had indicated an MSA could only follow after establishing an FSA, via a joint committee and related governance arrangements. Legislation was expected to go through Parliament in May. Cllr Leffman reported that a decision on which areas would proceed had been expected that week but had been delayed until after the May elections, following additional submissions about the proposed geography. She added that while there had been interest in including Buckinghamshire, it had not wished to participate at that stage, though ministers had expected it to align with a Thames Valley authority in due course. It was anticipated that the situation would be clearer by June, when the committee could be updated on the government's plans for the Thames Valley.

Following the introduction, the Committee commenced its questions.

Members sought more information about whether the intention was for Swindon to included as part of the Thames Valley Strategic Authority. Cllr Leffman said that officials had indicated that government wished Swindon to be included, consistent with the Spatial Development Strategy (SDS) geography. Central government officials had sought assurance that the Thames Valley partners would work with Swindon, and that she, together with the leaders of West Berkshire and Wokingham, had provided a statement to the Minister confirming their intention to work in partnership with Swindon if that was the Minister's direction. However, there were strong differences of opinion across Thames Valley partners on the desirability of including Swindon within the future Thames Valley strategic authority.

Given the benefits of an MSA, members sought to clarify whether it was possible to proceed directly to an MSA without first becoming a FSA. In response, Cllr Leffman said ministers had indicated that it would not be possible to move straight to an MSA, and that the forthcoming legislation required areas to begin as a FSAs. She added that leaders still sought clarification on what this would mean in practice, including the timetable for progressing to an MSA, and that the Minister had agreed to attend a leaders' meeting after the elections to discuss those questions.

Members sought to understand more about the proposed governance arrangements for the FSA. Cllr Leffman said officers had begun considering the governance arrangements, including the establishment of a joint committee, and she expected a clearer proposal to be brought back to the committee in June once government's arrangements were confirmed. She said representation was being considered on a population basis, with an initial suggestion of two representatives for Oxfordshire, one for each Berkshire authority, and two for Buckinghamshire if it joined. Further information would depend on the forthcoming legislation, which was due to go to Parliament in May.

In view of Swindon's absence from the Thames Valley Integrated Care Board (ICB), members questioned the rationale for a devolution geography that would not align with existing public-sector footprints. In response, Cllr Leffman said Thames Valley Liberal Democrat leaders had raised these concerns with the Minister, noting that Swindon was not coterminous with the ICB, Thames Valley Police or the fire service, and that including Swindon would therefore require significant cross-boundary changes. Ministers, nonetheless, had indicated they still expected Swindon to be included. Members expressed concerns over the loss of synergies, strategic clarity and inflexibility of including areas which were not co-terminous with existing public sector geographies such as the Fire, Police and Health services.

More information was sought on how the council's budgeted funding for the SDS would relate to the emerging devolution arrangements, including whether the SDS work would be undertaken jointly across the wider multi-authority area. Concerns were also raised about managing political and geographic differences within any future FSA. In response, Cllr Leffman said the Thames Valley authorities had worked constructively across party lines and had remained committed to progressing the arrangements, notwithstanding differing views on Swindon. She said government had indicated that around £400m would be available through the SDS process, including funding for infrastructure, and that the councils therefore needed to take the work forward. She added that Buckinghamshire had been expected by government to be part of the SDS discussions and was likely to participate, given the scale of the opportunity, and that further clarity was expected by June following the conclusion of the SDS consultation and a further meeting with the Minister.

The Committee **AGREED** to make the following recommendations to Cabinet:

- That the Cabinet should adopt and promote the position that there is immense value in having the future strategic authority share coterminous borders with existing public sector geographies.
- That the Cabinet works with partners to ensure that the Thames Valley Strategic Authority becomes a Mayoral Strategic Authority as early as is possible.

16/26 COMMUNITY ASSET TRANSFER POLICY
(Agenda No. 7)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Vic Kurzeja, Director of Property and Assets, and James Cater, National Management Trainee presented a report on the draft Community Asset Transfer Policy prior to its consideration by Cabinet.

Councillor Levy explained that the Council had historically dealt with community groups' use of County Council property on an ad hoc basis and had sought to formalise the process to make it clearer for the public and for groups wishing to use, lease or take on Council property. He said a two-part policy had been developed, covering community asset transfer and community leasing, to set out how the Council would offer more favourable terms to eligible community groups than to commercial tenants, and invited officers to present the detail and answer questions.

Officers said the community asset transfer policy had been redeveloped and split into two parts: asset transfer (including transfer at less than best consideration in recognition of social value) and community leasing. They said a cross-council working group had been established to assess applications and to identify properties for transfer or lease, bringing together property, community wealth building and relevant service leads to improve coordination. They outlined transparent assessment criteria focused on social value, support to statutory services, investment in the property, financial management and local community benefit, and said rent concessions had been determined on a case-by-case basis (including peppercorn rent where appropriate). VCS engagement had been undertaken via a survey and webinar, which had informed clarifications on revenue caps, expanded criteria, openness to 10+ year leases, subletting permissions, proportionate reporting and tenant obligations.

In response to the presentation and report, the Committee raised a number of questions and points of clarification.

It was suggested that the Community Asset Transfer Working Group might be under-resourced, and could benefit from public health, finance and legal attendees, as well as a more flexible meeting schedule.

The Committee discussed how different tenants could be treated consistently, including those who had existing arrangements under a different policy, and after local government reorganisation. In response, officers stated that there were relatively few existing arrangements and that they had reviewed current leases; when existing leases ended, renewals and any reapplications would be assessed through the same policy framework and working group process, so that tenants were treated consistently. Officers would communicate and engage with current voluntary and community sector partners to ensure they understood the new process and could prepare for renewal. Officers had also liaised with district councils and that, following any Local Government Reorganisation, policies and processes would be reviewed and realigned by the new authority, with the intention of maintaining broadly aligned principles and consistent outcomes across areas.

Members wished to know whether non-VCS organisations would be eligible to apply under the policy. It was confirmed that non-VCS community projects could apply under the policy, but VCS organisations would be prioritised where there were competing applications.

Greater information was sought over whether a community asset transfer was a full transfer of ownership or a long lease. In response, officers said asset transfer had been a transfer of the asset and responsibility for its management to a charitable organisation, but it would have been subject to conditions requiring the property to be used to deliver the agreed community services and social benefit. The arrangement would not continue if the agreed use ceased or the organisation sought to dispose of the property, and the property would return to the council under the same conditions. Officers had discussed the approach with legal colleagues, but that the detailed legal framework would have been developed on a case-by-case basis and was not set out in the policy; the committee suggested that clearer wording should have been added.

Concern was raised that the CAT policy night put the long term survival of organisations in the hands of the Council. In response, officers said leases and agreements would be subject to ongoing review, including annual financial information and service updates from the organisations, and that the council would work with groups to support delivery of the agreed social benefits. Longer leases could help organisations secure external grant funding, and that where circumstances or the agreed purpose changed, the matter would be reviewed and discussed accordingly.

The Committee requested details of the process to take on dilapidated or buildings of an inadequate standard, such as Wood Farm. Officers said the council would not have transferred or leased a dilapidated building that was not fit for purpose without conditions. Where a community organisation was willing and able to invest to bring a building up to standard, this would have been reflected in the lease terms and rent level (including the potential for a peppercorn rent). Where an organisation could not fund the works and the council still intended to lease the building, officers said the council would remain responsible as landlord for making the property fit for purpose. It was highlighted that the council would not have invested in a property until a decision had been made on its future, and that disposal would have been a last resort where there was no service or community need.

Members queried whether the proposed community asset transfer and community leasing policies were consistent with the CLES report and its recommendations. The policies did not fully address wider place-shaping considerations for the disposal of council assets, particularly land and non-VCS disposals, and the council needed clearer, value-led guidance to prioritise social value outcomes (including affordable and social housing) alongside best value. In response, Councillor Levy agreed in principle that community value should be considered, but said the Council still had an overriding obligation to secure best value and generate income to support services, with limited scope to take account of social benefit. Local Government Reorganisation was expected to bring landownership and housing responsibilities together in a new authority, which should strengthen the ability to deliver wider social objectives through land and asset decisions.

The Committee **AGREED** to make the following recommendations to Cabinet:

- That the Cabinet amends the CAT policy to make explicit reference to the sale of land
- That the Cabinet provides in the CAT policy fuller explanation of the approach taken in relation to transfers of dilapidated buildings
- That the Cabinet provides within the policy greater detail of the legal framework and process surrounding the transfer of ownership
- That the Cabinet reviews the operation of the Community Asset Transfer and Community Leasing Working Group with a view to increasing the resourcing to support it, broadening the membership to include Finance, Legal and Public Health colleagues, and making the regularity of its meetings more flexible.
- That the Cabinet ensures the property team works with relevant other Council departments to develop common definitions of 'social value' across teams
- That the Cabinet provides clarification over its social value priorities, to enable proactive place-shaping with regards to land and assets
- That the Cabinet ensures the property team are aware of and, as far as possible, in alignment with approaches taken by Oxfordshire's district and city councils with a view to avoiding creating inconsistencies following the upcoming unitarisation(s) under Local Government Reorganisation
- That the Cabinet ensures that there is a consistency of approach towards leases and transfers granted under the proposed policy and existing leases when they come up for renewal

17/26 BMMR (ADULT SOCIAL CARE FOCUS)
(Agenda No. 8)

Councillor Dan Levy, Cabinet Member for Finance, Property and Transformation, Councillor Tim Bearder, Cabinet Member for Adults, Lorna Baxter, Deputy Chief Executive and S.151 Officer, Karen Fuller, Director of Adult Social Services, Victoria Baran, Deputy Director of Adult Social Care, Stephen Rowles, Strategic Finance Business Partner, Isabel Rockingham, Head of Joint Commissioning HC Age Well, and Kathy Wilcox, Head of Corporate Finance attended to present the Business Management and Monitoring Report, focusing on Adult Social Care.

Councillor Bearder said the item was brought forward due to the Adult Social Care forecast overspend, which had been around £8m earlier in the year but had reduced to around £4m following mitigation work. Pressures reflected the demand-led nature of the service, including more complex presentations and hospital discharge costs. He also highlighted additional costs from the collapse of NRS (the council's equipment provider). Work continued to stabilise the position by year end.

Officers explained that the business management and monitoring report had summarised the council's finance, performance and risk position, and that separate capital monitoring and outturn reports had updated progress on the capital programme. The extract before the committee had focused on Adult Services and had formed part of a series of service-focused updates. The figures reflected the position previously considered by Cabinet in March and were based on the January monitoring position, with a revised and improved outturn position due to be reported to Cabinet in June. Officers highlighted key adult-services-related capital schemes, including the residential accommodation programme, an update on the supported homes investment, and the passthrough of Disabled Facilities Grant funding to district councils. It was noted that the January forecast had taken a prudent approach and that mitigating actions had been taken to prevent recurring pressures in 2026/27, including through application of monies from the Better Care Fund and the agreed budget. The Director of Adult Social Care said the service had maintained close financial oversight through regular management reviews, reported continued success in discharge-to-assess and 'home first' arrangements with higher numbers of people supported to return home, and noted increased complexity and intensity of need. She also reported progress on reducing unsecured debt, including proactive work on deprivation of assets and recovery action through the courts.

In response to the introduction and on the basis of the report, committee members raised a number of queries.

More information was sought on the high number of discharges. Officers said the increased discharge numbers reflected a shift towards supporting more people to return home, rather than moving into care homes, with additional home-care capacity provided in the early days after discharge. They reported that this had followed joint work with commissioners and providers to strengthen the discharge-to-assess pathways, enabling higher throughput (with seasonal variation). The overall number of people delayed in hospital had broadly stabilised, but the number of days of delay had reduced as the discharge process had accelerated.

Members asked why a £3.5m cost pressure was evident so early on the year and why it had not been included within the Council's budget.

Officers explained that the figure had been based on the January position and had been subject to change through in-year reconciliations, including changes in individuals' circumstances and the impact of backdated continuing healthcare payments from the Integrated Care Board. The budget process timetable had meant the increase had not been fully evident when the budget had been set, and that the service had expected some one-off 2025/26 costs to fall away in 2026/27. The issue was expected to be managed through in-year budget realignment within Adult Social Care, and that a small number of high-cost cases (including transitions) could materially affect the position.

Councillor Shiri left the meeting at this point.

Members sought more information on the trajectory of numbers of individuals in care. Officers said the number of people in residential care had continued to reduce, but at a slower rate than previously, reflecting increasing complexity and intensity of need.

They noted that around 54% of care home residents were self-funders and that recent increases in placements had been driven largely by the self-funding market, including individuals who had placed themselves without council involvement. They said the council had continued to support eligible people to move from care homes into extra care housing or supported living where appropriate, and that work had been underway with Age UK Oxfordshire and the care association to improve information and choices for self-funders. They also highlighted the opening of a new extra care housing scheme in Faringdon as part of the longer-term strategy, and said that residential and nursing care had remained focused on people with the highest levels of dependency whose needs could not be met through extra care housing or care at home.

Discussion was held over the degree to which adult social care could be influenced at a local level or whether the primary determinants lay with demographics and central government.

In response to a question about the implications of Local Government Reorganisation (LGR) and learning from neighbouring areas, Cllr Bearder said the eventual model remained a ministerial decision, but noted concerns arising from LGR proposals elsewhere. He cited Essex, where a single adult social care function had been proposed to be split into five, and said the authority had pursued judicial review. He said such fragmentation risked duplicating senior capacity (including multiple Directors of Adult Social Services and deputy posts), splitting contracts and commissioning arrangements, and undermining established integrated pathways. He added that Oxfordshire's current approach relied on close working with acute hospitals and a single discharge pathway and pooled budget arrangements, which could become more complex if responsibilities were divided across multiple new authorities.

Members discussed the challenges of recruitment, the desirability of being able to recruit locally during a time of increased youth unemployment.

Councillor Mallon left the meeting at this point.

The Committee made no recommendations to Cabinet.

18/26 COMMITTEE ACTION AND RECOMMENDATION TRACKER
(Agenda No. 9)

The Committee **NOTED** the action and recommendation tracker.

19/26 COMMITTEE FORWARD WORK PLAN
(Agenda No. 10)

The Committee **AGREED** the proposed work programme.

20/26 RESPONSES TO SCRUTINY RECOMMENDATIONS
(Agenda No. 11)

The Committee **NOTED** the Cabinet responses to the reports on:

- BMMR – CEF Focus
- Budget Proposals for 2026/27 to 2030/31

And the draft responses from Cabinet relating to reports on:

- BMMR – Public Health Focus
- Parking Permits
- Social Value

.... in the Chair

Date of signing ....

PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

MINUTES of the meeting held on Tuesday, 12 May 2026 commencing at 12.01 pm and finishing at 12.02 pm.

Present:
Voting Members:

Councillor Brad Baines
Councillor Ron Batstone
Councillor Will Boucher-Giles
Councillor Tom Greenaway
Councillor Kieron Mallon
Councillor Ian Middleton
Councillor Glynis Phillips
Councillor John Shiri
Councillor Liam Walker

Other Members in Attendance:

Officers: Anita Bradley, Director of Law and Governance and Monitoring Officer
Colm O'Caomhanaigh, Democratic Services Manager

The Council considered the matters, reports and recommendations contained or referred to in the agenda for the meeting and decided as set out below. Except insofar as otherwise specified, the reasons for the decisions are contained in the agenda and reports, copies of which are attached to the signed Minutes.

21/26 APOLOGIES FOR ABSENCE AND TEMPORARY APPOINTMENTS
(Agenda No. 1)

There were none.

22/26 ELECTION OF CHAIR FOR THE 2026/27 COUNCIL YEAR
(Agenda No. 2)

Cllr Phillips was nominated by Cllr Baines and Cllr Mallon.

There being no other nominations, Cllr Phillips was **APPOINTED** Chair of the Performance and Corporate Services Overview and Scrutiny Committee for the 2026/27 municipal year.

23/26 ELECTION OF DEPUTY CHAIR FOR THE 2026/27 COUNCIL YEAR
(Agenda No. 3)

Cllr Middleton was nominated by Cllr Phillips and Cllr Walker.

There being no other nominations, Cllr Middleton was **APPOINTED** Deputy Chair of the Performance and Corporate Services Overview and Scrutiny Committee for the 2026/27 municipal year.

.... in the Chair

Date of signing ....

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

12 JUNE 2026

BUSINESS MANAGEMENT AND MONITORING REPORT & CAPITAL OUTTURN REPORT

(FOCUS ON OXFORDSHIRE FIRE & RESCUE SERVICE AND COMMUNITY SAFETY)

Report by Deputy Chief Executive (S151 Officer)

RECOMMENDATION

1. **The Committee is RECOMMENDED to**

   - consider the report and raise any questions, and to **AGREE** any recommendations it wishes to make to Cabinet.

Executive Summary

2. The Performance and Corporate Services Overview and Scrutiny Committee has a constitutional responsibility to scrutinise 'corporate performance and directorate performance and financial reporting.'

3. The Cabinet is informed of the Council's performance via the Business Management and Monitoring Report (BMMR). To aid the ability to scrutinise, the Committee has agreed to focus on Fire & Community Safety in June.

4. To reflect the Cabinet June 2026 BMMR and Provisional Outturn paper that will be reporting the Outturn financial position and end of Q4 performance and strategic risk, there is an abridged version as Annex 1 (Finance) and Annex 2 (Performance). Also in the June Cabinet meeting is the Capital Outturn report.

Background

5. The paper reports on the Council's performance in terms of finance, delivery and risk, including detail at a service level. To support a focus on Fire & Rescue Service and Community Safety Service, there are only excerpts relating to the service included here. In that respect, the report is the same as that is being considered by Cabinet on 16 June 2026.

Financial Position

6. Fire & Rescue Service and Community Safety Service Area overspent by £0.5m against a budget of £32.6m.

7. Further information about the council expenditure is included in Annex 1.

8. The Service Area was holding £3.4m of reserves on 31 March 2026. Annex 1 outlines the reserves and purpose.

Capital Position

9. At year end, certain vehicles and equipment programmes used by the Fire & Rescue Service have been added to the Council's asset register. The value of Fire & Rescue Service vehicles and equipment purchased in 2025/26 was £1.3m and was funded from revenue contributions built into the revenue budget.

10. Due to the Fire Service countywide review and consideration of options on how to manage and operate the property portfolio going forwards the Carterton Community Safety Centre (£6.0m) project is currently on hold.

11. Please note that this service is also affected by the council-wide Estate Decarbonisation Programme and health and safety aspects of the Property Strategy.

Performance

12. Committee members should be aware that they are being provided with the scorecard of the Council's performance in relating to annual measures and specific measures directly relating to Fire and Community Safety in Annex 2.

13. All measures included have a year performance of Green.

Corporate Policies and Priorities

14. Overall corporate performance supports all the Council's policies and strategic priorities. Whilst the work of Fire and Community Safety has cross-cutting input into all the Council's strategic priorities also, its work primarily furthers the Council's ambitions to "Tackle inequalities in Oxfordshire", and "Prioritise the health and wellbeing of residents".

Financial Implications

15. There are no additional financial implications beyond those outlined within the appendices to this report.

    Comments checked by:
    Kathy Wilcox, Head of Corporate Finance
    kathy.wilcox@oxfordshire.gov.uk

Legal Implications

16. The Performance and Corporate Services Overview and Scrutiny Committee has a specific responsibility within its terms of reference, under Part 6.1A of the Constitution 5 (1) (a) to scrutinise 'corporate performance and directorate performance and financial reporting'.

17. This report demonstrates that scrutiny responsibility being carried out in respect of Fire & Community Safety, enabling the Council to meet its fiduciary duty to council taxpayer.

    Comments checked by:

    Jay Akbar
    Head of Legal & Governance

Lorna Baxter
Executive Director Resources and Section 151 Officer

Annex: Annex 1: Finance – May 2026 – Provided here, abridged.

Annex 2: Performance section – May 2026 – Provided here, in full.

Background papers:	None
Other Documents:	None
Contact Officer:	Verity Royle Financial Planning and Reporting Manager verity.royle@oxfordshire.gov.uk

June 2026

Annex 1 – Abridged Business Management and Monitoring Report – Finance – March 2026

Service Area Budget

Service	Net Budget	Actual Spend	Actual Variance	Last Reported (period 10)	Change
Fire & Rescue	£30.7m	£31.4m	£0.6m	£0.7m	-£0.1m
Emergency Planning	£0.3m	£0.3m	-£0.0m	£0.0m	£0.0m
Trading Standards	£1.5m	£1.4m	-£0.1m	-£0.1m	£0.0m
Total Fire & Rescue and Community Services	**£32.6m**	**£33.1m**	**£0.5m**	**£0.6m**	**-£0.1m**

Government Grants

		Service Areas	Budget Book 2025/26	Updates from Grant letters	Timing transfers	Actual Allocation	Change in grants
			£000	£000	£000	£000	£000
R	MHCLG	Fire Fighter's Pension Fund Grant	1,061	1,014	0	1,014	-47
R	MHCLG	Fire Protection Uplift Grant	252	252	0	252	0
R	MHCLG	Fire Fighter's New Dimensions Grant	40	40	0	40	0
		Fire & Rescue and Community Safety	**1,353**	**1,306**	0	**1,306**	**-47**

Reserves

Fire & Rescue and Community Safety	Balance at 31 March 2025	Movement	Balance at 31 March 2026
Grants and Contributions Reserve	£0.5m	-£0.3m	£0.1m
Vehicle and Equipment Reserve	£3.1m	£0.2m	£3.3m
Total Fire & Rescue and Community Safety	£3.6m	-£0.1m	£3.4m

£0.1m Grants and Contributions Reserve:

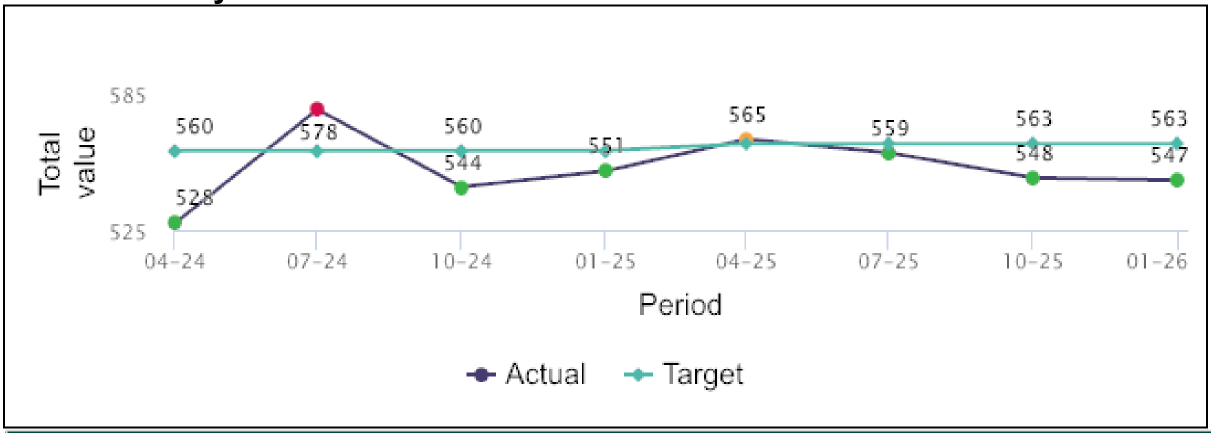
- £83k Home Office - Building Risk/Fire Uplift Grant. This is to fund employee costs expected to be incurred over the next year.
- £44k Home Office – Emergency Services Mobile Communication Programme. This is to fund commitments related to the programme.

£3.3m Vehicle & Equipment Reserve:

- £2.4m Fire Vehicle replacement fund. A fleet replacement strategy has been developed, and several vehicles have been ordered.
- £0.9m Communications funds to cover the cost of the replacement of Airwave for Oxfordshire Fire and Rescue Service and the implementation of the new national Emergency Service Mobile Communications Programme.

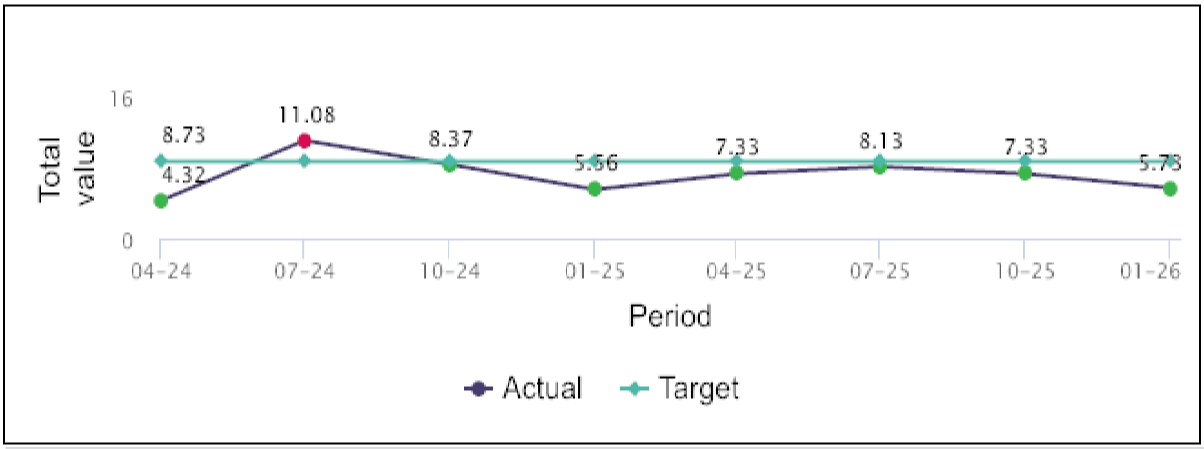
Annex 2 – Performance - OFRS 25/26 end of year position

OCC03.08 Average response time for attendance at an emergency incident in Oxfordshire by a fire service vehicle



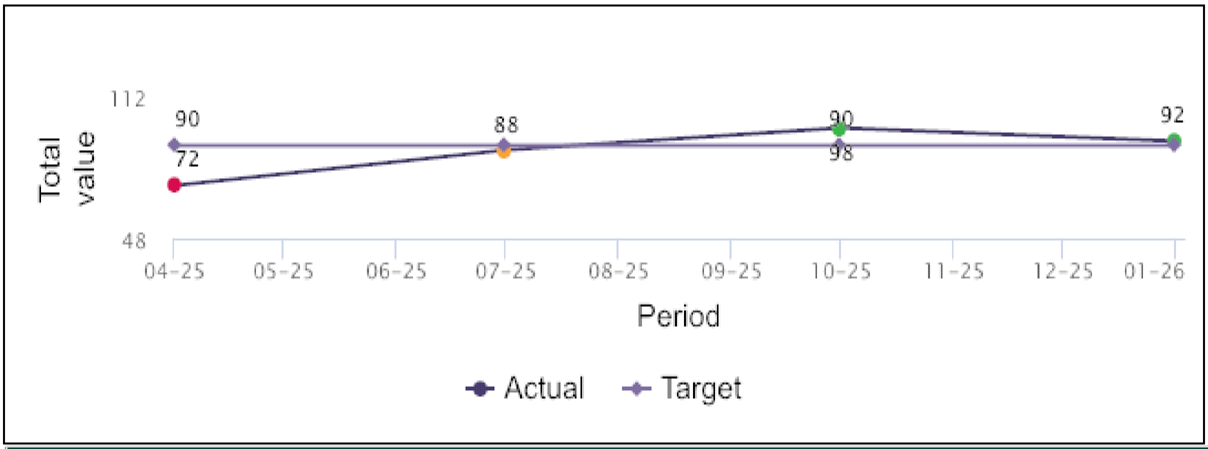
Commentary
9 mins 7 seconds (547 seconds) We are still seeing a continued improvement since the launch of the fire and rescue cover model. This has had a notable impact across several stations, with teams working diligently to demonstrate that they can maintain availability and ensure swift, efficient responses to incidents. Looking ahead to Q1, we will keep monitoring this measure closely, in line with the recommendations that will be taken forward from the fire and rescue cover model. By maintaining our focus and supporting the stations as they adapt, we'll ensure that standards remain high and the positive momentum continues.

OCC03.10 Number of accidental fires in people's homes per 100,000 population



Commentary
Q4 actual is below target both for the quarter and also for the year. The total for the year has also decreased when compared with last year 24/25. We are also below the national average, based on this year and 10 years of data.

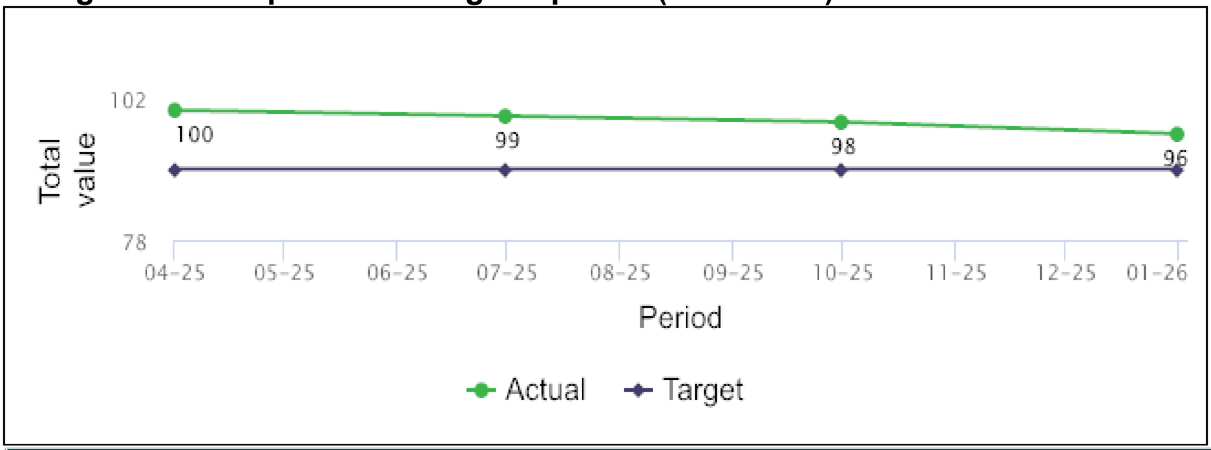
OCC09.01 Percentage of businesses that were either compliant when visited or brought into compliance during the period (Trading Standards)



Commentary

Quarterly actual is above target and we end the full year above target, even though our intelligence-led approach, aimed at directing finite resources to those issues and traders of greatest concern, often means we are working to bring some of the hardest situations in to compliance.

OCC09.02 Percentage of businesses that were either compliant when visited or brought into compliance during the period (Protection)



Commentary

92 audits were completed within the quarter, with 4 remaining non-compliant as we cross into a new quarter/year. It is normal to have some level of non-compliance between quarters, as we continue to support businesses into compliance and/or are undertaking formal action such as issuing Enforcement Notices.

Performance & Corporate Services Overview and Scrutiny Committee

12 June 2026

OCC Commercial Strategy Update

Report by the Director of Financial and Commercial Services

RECOMMENDATION

1. **The Committee is RECOMMENDED to**

   a) Note the progress made to date on the implementation of the council's Commercial Strategy,

   b) Agree to the continued implementation of the council's Commercial Strategy over the remaining life of the council prior to Local Government Reform (LGR).

Executive Summary

2. In FY2023/24 the council developed a new Commercial Strategy to set the ambition and pathway to embedding commercial thinking across our culture and governance. The strategy set out the vision to leverage Oxfordshire's unique assets and strengths to optimise organisational efficiency, generate sustainable revenue, support the development of a more inclusive local economy, and enhance public services through innovative and responsible commercial activities.

3. The Commercial Strategy was considered by the Performance & Corporate Services Committee in November 2023 and approved by Cabinet in March 2024. This report provides an update on progress against the actions set out in the original strategy, and highlights some of successes to date.

4. A key goal of the Commercial Strategy over the next two years is to positively influence the commercial appetite and ambition of all Councils involved in Local Government Reorganisation across Oxfordshire and West Berkshire.

Progress to date

5. Following the approval of the Commercial Strategy in March 2024, the Council has worked to implement the wide-ranging initiatives it contains.

6. A key implementation milestone has been the Financial & Commercial Service redesign with the appointment of a new Head of Commercial & Procurement in

June 2025 and the go-live of the new Commercial & Procurement service in December 2025. The transition between old and new structures has been challenging but recruitment is now complete with all roles appointed (final new starters to join in July 2026).

7. A key demonstration of the change in commercial behaviours within the council is the acquisition of the Castle Quarter site in Oxford. Where previously the council likely would not have considered such an acquisition, the investment provides a unique opportunity for the council to deliver on its place-shaping mission, redeveloping a key historical quarter of the city to support businesses, tourism, and residents, while at the same time providing a net positive financial contribution to the council. This investment alone provides £550k of net surplus to the council per annum.

8. The Commercial Strategy set out 6 key principles:

(a) Commercial Awareness
  (1) Through investment in new market insight tools, the council is gaining a better understanding of key trends in the supply chains. Through FY2026/27 the council will be implementing a new supplier relationship management approach to leverage strategic partnerships and launching a new commercial curriculum to improve capabilities of managers and staff across the council's services through curated training based on role and need.

(b) Value Creation
  (1) The council's new Social Value Policy was approved by Cabinet in March 2026 and is currently being implemented. Responsibility for evaluation and delivery has been brought back in-house and is coupled with additional support and training for contract managers. The council is increasing its use of new flexibilities under the Procurement Act 2023 to unlock value through dialogue and negotiations with suppliers.

(c) Strategic Thinking
  (1) Cross-functional groups are bringing together the right skills to better understand and plan for the long-term trends that need to be managed and mitigated through service commissioning (e.g. demographic shifts), allowing data-led decisions now. Planning for LGR is progressing on schedule, ensuring new contract awards can accommodate different LGR scenarios and plans are drawn up to prioritise critical activity over the next 2 – 3 years.

(d) Resourcefulness
  (1) The Commercial Service has a continuous improvement hopper of more than 60 suggestions for continuous improvement, with a number being progressed to improved efficacy and efficiency of the service. An internal AI agent has already been launched to support Procurement queries, reducing administrative demand on the team and enabling focus on more strategic activity.

(e) Entrepreneurial Spirit
  (1) New and innovative commercial solutions are being pursued to contribute to the council's ambitions to positively shape the county

and lives of residents. These include solar panel subscription services, private 5G networks, and the role of the council's own tree service.

(f) Collaboration

(1) Improved collaboration between the Commercial & Procurement Service and counterparts in other authorities has seen shared insight, resources, and ways of working emerge. This includes approaches to LGR, AI and automation (including wider commercial system strategies), and governance approaches. Internally key collaborations between HR, Finance, and Commercial Services through their respective strategic business partners means there is greater consistency and impact in support of service areas who see a combined and coordinated response from Resources to enable their needs.

9. In FY2025/26 the council identified £2.4m of contracts and third-party savings with a further £1.44m of savings recorded so far in FY2026/27. A number of system and process changes have been implemented to improve the identification and recording of savings, with additional training provided to the Commercial Service.

10. Annex 1 below sets out a more granular view of progress to date against the specific amber made in the Commercial Strategy. The Annex is given a RAG status with 21 actions across 5 themes (15 Green, 6 Amber, 0 Red).

11. Of the Amber actions, all are still relevant and plans are in place to make marked progress over the remainder of FY2026/27. The main theme emerging for the delays relates to other changes ongoing across the Council, including organisational redesign and upgrades to our IBC SAP system.

Corporate Policies and Priorities

12. The Commercial Strategy acts as an enabler of two of the key strategic initiatives for the Council:

Greener	Fairer	Healthier
Through delivery of the Ethical Procurement Policy and decarbonisation / Net Zero initiatives, the Commercial Service acts as an enabler to ensure our supply chain contributes to our strategic ambition of a Greener county.	Through the Social Value Policy, we're reducing barriers to entry and aiming to increase our expenditure with Oxfordshire-based businesses, particularly SMEs, VCSEs, and Local B-Corps who all positively contribute with in-county employment opportunities and support in their local communities.	The largest area of spend for the Council is on our People services (Adults, Childrens, and Public Health). A more efficient and effective commercial service enables more cost effective service delivery, enabling greater investment in preventative services

Partner of Choice	Employer of Choice	Place-shaper of Choice
Through the Commercial Strategy, the Council is reducing barriers to entry, ensuring prompt payment of suppliers, and taking a more pragmatic approach to allocating risk in contracts. This creates a more welcoming environment for suppliers to work with OCC without exposing the Council to undue risk.	Through the redesign of the Commercial & Procurement Service we have created new career development opportunities. This is coupled with the implementation of the Commercial Curriculum which will support Commercial colleagues and others across the Council to build their capabilities with structured support.	The Commercial Strategy is enabling the Council to explore new and innovative commercial opportunities, working with the business communities and other partners to invest in technology and infrastructure that is building on existing key strengths of Oxfordshire including 5G private networks, acquisition of the Castle Quarter site, and green energy generation.

Financial Implications

13. The delivery of the Commercial Strategy is supporting services to achieve planned budget savings of £5.0m relating to reductions in contract and third party spend (budget reference CORPRES102 included in Section 4.2 of the budget report to Council on 11 February 2025). £2.4m of this was achieved and removed from service budgets to align with updated expenditure in 2025/26.

14. Based on funding notified as part of the Local Government Finance Settlement for 2026/27 the council needs to make further savings to manage a budget deficit of £15.5m from 2027/28 that will increase over the Medium Term Financial Strategy. Further savings from contract efficiencies will be required to help to the council set a balanced budget in 2027/28.

Comments checked by:
Kathy Wilcox, Head of Corporate Finance (Deputy S151 Officer)

Legal Implications

The legal implications section should be completed by a member of the legal service

15. There are no direct legal implications arising from this report.

Comments checked by:
Jayne Pringle, Principal Solicitor (Contracts)

Jayne.pringle@oxfordshire.gov.uk

Staff Implications

16. The work involved in delivering the OCC Commercial Strategy is primarily led by the recently redesigned Commercial & Procurement Service. The team will draw upon expert support and work with colleagues from across the Council on individual initiatives to make progress against the vision and mission in the strategy.

Equality & Inclusion Implications

17. There are no direct equality or inclusion implications of the council's Commercial Strategy. Key elements of the strategy aim to improve inclusivity and reduce barriers to entry for key supplier groups such as Small & Medium Enterprises (SMEs), Voluntary, Charity, & Social Enterprises (VCSEs), Oxfordshire-based B-Corps, and wider Oxfordshire-based businesses. Any individual initiative under the strategy that may have an impact on equality and inclusion will conduct a relevant and proportionate assessment.

Sustainability Implications

18. There are no direct sustainability implications of the OCC Commercial Strategy. A key strategic commitment of the Council is to achieve a "Greener" county, and the Commercial & Procurement Service recognise their role in enabling the achievement of that goal. Through our Ethical Procurement Policy (published 13th June 2025) the service seeks to minimise our environmental impact and maximise the sustainability opportunities of each project. Any individual initiative under the strategy that may have an impact on sustainability will conduct a relevant and proportionate assessment

Risk Management

19. Effective control and management of third party transactions, whether procured, grant-funded, or income generation, is critical to the financial sustainability of the council. The Commercial Strategy is putting in place the right infrastructure, support, and culture to deliver improved value from these third party engagements. To date, the new service is seeing positive improvement in savings identification and delivery, improved contract management activity, and more informed decision-making that is mitigating potential budget pressures. Risk remains that with the added complexities of LGR that resources across the council are stretched. The Commercial & Procurement service will continue to operate cross-functionally and play a coordinating and convening role, leveraging the new business partnering operating model across Finance, HR, and Commercial, to ensure front-line services are supported.

Ian Dyson, Director of Financial & Commercial Services

Annex:	Annex 1 – Action Tracker Annex 2 – Cabinet Paper with Commercial Strategy
Contact Officer:	Richard Scarlett Head of Commercial & Procurement Richard.scarlett@oxfordshire.gov.uk

June 2024

Annex 1 – Action Tracker

In the table below, the Progress RAG status means:
- Green – progress is on track or ahead of expectations
- Amber – progress is slower than expected

Theme	Action	Update	Progress RAG
Information and systems	Develop greater visibility of data and management information on third party spend and any associated risk exposure (complementing existing initiatives to enhance data and performance insights)	Work is ongoing to draw spend insights from the different finance, commercial, and operational systems in operation across the Council, with progress delayed by a long change embargo with our SAP finance system due to IBC-led system upgrades. The Council has signed a new agreement with our commercial platform provider, Atamis, to implement their contract management module. For the first time this will allow us to capture supplier performance information in one consistent place for all contracted suppliers. In turn, this will enable the Contract & Supplier Management team to proactively manage underperformance, stepping in to assist devolved contract managers in improving delivery or early identification of a need to replace a contract no longer meeting expectations. This module will be implemented over the remainder of 2026.	
	Use market intelligence, data and management information to inform commissioning, contracting, contract management and asset acquisition, management and disposal activity	The Commercial & Procurement Service have agreed access to two new market intelligence tools (IBIS World for market reports, and DataGardener for company insights). These are being used regularly within the service to support market scoping and shaping our procurement approaches. The service is using these tools (particularly DataGardener) to support non-procurement initiatives, including scoping the commercial income generation opportunities for the 5G Digital Infrastructure project on the Harwell Campus, and providing business data for Place Planning enabling richer insight into a key community for engagement in place-shaping initiatives.	

	Simplify processes, common systems and ways of working	Working with colleagues in the Capital Programme, Commercial & Procurement, and the Corporate PMO, a new standard business case template has been developed, aligning with HM Treasury's Green Book 5-case model. This is being rolled out to standardise and structure the information required to make informed decisions across the project lifecycle. The Commercial & Procurement Service have a continuous improvement process in place with an ideas hopper of over 60 initiatives across a range of topics. This includes updates to systems, skills development, and refining templates. The Commercial Board undertook a Board Effectiveness Review and invited feedback from project teams and board members. This has resulted in a refreshed terms of reference which streamlines and better articulates the scope and remit of the board, and how the board will support the improvement of the quality of project strategies / business cases.	
Process	Run major procurements with assurance and achieve good service user and commercial outcomes	OCC has established the Commercial Board as an assurance gateway for all revenue expenditure project above £1m total value. The board is made up of Heads of relevant OCC services and is chaired by the Head of Commercial & Procurement. The goal of the board is to improve the quality of a project before it goes to market. In the last 9-months the board has stopped 14 projects from publishing tenders until they improved their quality.	
	Create simple and automated process to order and pay for goods and services and provide an efficient transactional process for internal and external suppliers, ensuring contractual obligations are met	Thanks to work led by the Finance Systems & Data team, in FY25-26 OCC's IBC portal processed almost 373,000 transactions totalling more than £1.2bn in value (including transactions from Schools). The team are continuing to explore opportunities to improve the transaction experience for colleagues and suppliers. Our first transparency notice for contract payment performance demonstrated that 99.4% of invoices were paid within 30 days demonstrating great performance but still with an opportunity to improve.	

	Manage external supplier relationships well and consistently, and optimise the value of these relationships over time	Progress was delayed until post-service redesign and a necessary transition and recruitment process. Our new Contract & Supplier Management team (part of the Commercial & Procurement Service) are developing a Supplier Relationship Management programme for the Council's platinum suppliers. This programme will include standing agenda items that seek to create incremental value beyond contractual commitments by exploring opportunities for innovation and additional social value.	
	Create the capability to shape and develop new markets as required to support commissioning needs	The successful Care Home Framework project has helped to develop a highly competitive residential care home market in the county and the project has been shortlisted for a national award. The Commercial & Procurement Service continue to work with Commissioning and service colleagues across Adults and Children to explore new opportunities to improve efficacy and efficiency of care and education services.	
	Improve the business cases process and forward planning to manage and mitigate risk exposure	As referenced above, working with colleagues in the Capital Programme, Commercial & Procurement, and the Corporate PMO, a new standard business case template has been developed, aligning with HM Treasury's Green Book 5-case model. This is being rolled out to standardise and structure the information required to make informed decisions across the project lifecycle.	
People and capability	Make decisions with commercial acumen and proactively seek to understand and manage risk	A new tool has been developed to structure the risk assessments for new contracts, assessing 43 separate risk factors at different stages of the project / contract life. This tool also enables a more structured approach to setting insurance and liability levels within a contract, with a new Standard Operating Procedure in place requiring the Head of Commercial & Procurement's approval to move away from the recommended levels.	
	Embed consistent and rigorous contract management (complementing existing initiatives to build communities of practice)	Progress was delayed until post-service redesign and a necessary transition and recruitment process. Through the service redesign a new centre-led approach to contract management has been developed with a new Contract & Supplier Management team as part of the Commercial & Procurement Service. This team are implementing the Contract &	

		Supplier Management Framework which sets the standard for 'good' contract management at OCC. So far, they have assessed the Council's Platinum tiered contracts and are developing bespoke improvement plans. Following a scheduled lessons learnt exercise, the team will continue the implementation of the framework over the remainder of the year to the other contract tiers.	
	Build a culture of continuous improvement and organisational learning	The Commercial & Procurement service have a scheduled monthly meeting which includes a spotlight project to share best practice and learning experiences where projects may have gone awry. This will also feed in to the Commercial Curriculum (see response below).	
	Adopt a structured approach to commercial skills development so that individuals are able to act confidently	The Commercial & Procurement Service are developing a "Commercial Curriculum" to provide a structured and curated learning journey. The curriculum has four target audiences: - Colleagues within the Commercial & Procurement service - Contract Managers across the Council (c.360 individuals) - Wider Council colleagues who want to improve their commercial acumen / understanding of how to responsibly spend public money - Suppliers to help understand our needs and how to successfully win business (reducing a barrier to entry). The team are working with OCC Learning & Development to explore AI video generators to help create accessible and engaging eLearning material based on internally developed content.	
Define risk appetite	Focus on managing an appropriate level of risk, not avoiding it	As referenced above, a new Contract & Supplier Management Risk Assessment Tool has been developed allowing a detailed assessment of risk and appropriate mitigations / management steps to be put in place. Decisions on contract risk (insurance, liability, contract management effort) have been assigned to the Commercial & Procurement Service recognising that risk is ultimately a commercial decision in conjunction with advice from relevant experts.	
	Balance caution with innovation to support informed, responsible risk taking	Collaboration across multi-functional teams is enabling the Council to explore innovative commercial opportunities. These include revenue generating opportunities such as 5G Private Networks for businesses	

		and Solar Panel Subscription services for residents, to new procurement frameworks to save money and leverage a better deal including a concession contract for an infrastructure framework and a tree care framework.	
	Prioritize transparency and sound assessments	The Council's financial and commercial transparency is increasing to meet the new requirements of the Procurement Act 2023. All transactions above £500 are published to the Council's website on a monthly basis. Additional transparency notices are published in accordance with regulatory requirements (including publishing our pipeline of opportunities, and our invoice payment performance). Further work is planned for summer 2026 to integrate the commercial platform (Atamis) with the CPMO project management platform to provide improved visibility for senior leaders of procurement activity (active and planned).	
	Improve visibility of demand management to inform decision-making	Progress was delayed partly due to organisational redesign, and partly working with service colleagues to define the necessary analysis and datasets to inform decision making. Work is ongoing with the Data Service to improve visibility of demand data. The Commercial Board has acted as an enforcement gateway for this, holding projects until they are able to better demonstrate how demand forecasts support their planned commercial strategy.	
Monitoring and evaluation	Regularly assess the performance of commercial activities to track progress against key objectives and metrics, such as revenue generation, job creation, and social impact	Progress was delayed until post-service redesign and a necessary transition and recruitment process. In March 2026, Cabinet approved a new Social Value policy bringing responsibility for evaluating and managing delivery back in house. The new policy sets out 5 social value priorities for the Council, with a procurement selecting the most applicable and appropriate two priorities against which they will secure commitments from suppliers. Over the remainder of FY26-27 we will be setting a baseline for each of these priorities so that we can measure and demonstrate progress. As a condition of the investment in the Commercial & Procurement Service redesign an additional target of £700k of savings / revenue generation has been set. Changes have been made to the commercial	

		platform (Atamis) to better capture agreed benefits (requiring approval from the SRO, Finance, and Commercial leads) and the Finance Systems & Data team are developing a dashboard to simplify monitoring of performance.	
	Conduct ongoing risk assessments to identify and mitigate potential risks associated with commercial ventures	A contract management toolkit has been developed, including a default risk register available for contract managers to use with their contracts. Key risk mitigations will be implemented as the contract management system (referenced above) is rolled out, including the ability to monitor the availability of contract-level business continuity plans, supplier insurance provisions, and exit plans. The Dunn & Bradstreet intelligence platform has been integrated with the commercial platform (Atamis) enabling real-time monitoring of changes in supplier financial stability. Daily alerts are received by the Contract & Supplier Management team with any material ones being actioned with the relevant contract manager.	
	Maintain transparency and accountability by regularly sharing information about commercial activities with residents and stakeholders	As referenced above, The Council's financial and commercial transparency is increasing to meet the new requirements of the Procurement Act 2023. All transactions above £500 are published to the Council's website on a monthly basis. Additional transparency notices are published in accordance with regulatory requirements (including publishing our pipeline of opportunities, and our invoice payment performance). In addition, the Head of Commercial & Procurement has been engaging business groups and advocacies to share updates to our social value policy. These groups have helped shapes our approach including recognising the inherent social value of Oxfordshire based suppliers, SMEs / VCSEs / Local B-Corps / etc.	
	Develop key performance indicators, for example: number of suppliers in each category/by spend	Progress was delayed by the quality of data and interoperability of the commercial and financial systems, and the change embargo due to the SAP upgrade. The Council has commissioned a new responsible procurement dashboard to be created, for the first time allowing us to produce a baseline and replicable analysis for our spend across a range	

		of different types of supplier (e.g. SME, VCSE, B-Corp, Oxfordshire-based, etc.). This will enable us to measure progress against our social value objectives.	
	Once the data and insights work has been completed, seek opportunities to benchmark and conduct comparative studies while consolidating any disparate spend	Working with Finance colleagues we are utilising available external datasets to conduct 'statistical near-neighbour' benchmarking to identify opportunities to improve value in our contracts. The Council also participated in the Local Government Association procurement strategy benchmarking process, receiving valuable qualitative insight on how we compare with peers as a service in our structure, scope, and outcomes. The feedback from this process has fed into our continuous improvement pipeline.	

Annex 2 – Cabinet Paper

The paper was viewed and approved by Cabinet at the meeting on the 19th March 2024.

The paper can be found here: aebhdfh

PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE
– 12 JUNE 2026

SHAPING OXFORDSHIRE'S FUTURE ECONOMY

Report by Robin Rogers, Director of Economy & Place

RECOMMENDATION

1. **The Performance & Corporate Services Overview & Scrutiny Committee is RECOMMENDED to**

   a. **NOTE** the work undertaken to date, and the conclusions arising from it; and

   b. **NOTE** the proposal to develop an Oxfordshire Investment & Productivity Plan, and the intention to submit it to Cabinet for approval in July 2026

Executive Summary

2. Since October 2026, the Future Economy team - with consultancy support, and working with colleagues across the City and District Councils – has undertaken an analysis of Oxfordshire's economy, strategy map, and institutional landscape.

3. This report sets out a summary of the work undertaken to date, and provides a clear, evidence-led account of:

   - the current strengths and structure of Oxfordshire's economy;
   - why Oxfordshire does need to continue to grow, and why the most consequential growth decisions will take time;
   - why waiting to act is not a viable option for businesses and residents over the next few years;
   - the role of Community Wealth Building in developing Oxfordshire's economy;
   - the case for a focused, near-term Investment & Productivity Plan, particularly in the context of Local Government Reorganisation (LGR); and
   - the need for that Plan to be overseen by and delivered through a collaborative partnership arrangement.

4. In summary, Oxfordshire starts from a position of exceptional economic strength. Its challenge is how to accelerate success in a mature but constrained system. Growth remains essential, but consequential decisions will take time to come to fruition. Therefore, focusing on enabling businesses and residents, and ultimately delivering better productivity, is how Oxfordshire can build momentum through change and ensure that when the next phase of growth is unlocked, it lands in a system that is more functional, resilient and investable.

5. The paper aims to establish a practical basis for action now, through a near-term Investment & Productivity Plan, while longer-term growth decisions are worked through

Overview

2. The work undertaken by Metro Dynamics on behalf of the county has reached a conclusion, and the products are appended to this report. Appendix A provides an executive summary of their work and their recommendations.

3. Their analysis has provided clarity on priority places across the county (Banbury, Bicester, Oxford, Science Vale and the surrounding areas, and West Oxfordshire); priority sectors; and a headline delivery framework of interventions and activity in the short, medium and longer terms.

4. In the context of the County Council's informal position on managed growth, the next phase of work is to develop a near-term Investment & Productivity Plan into which local government can both commit resource and seek to leverage external funding; and develop the partnership mechanisms to oversee the delivery of the plan through a period of institutional and economic turbulence.

Oxfordshire's economy today

Overall scale and performance

5. Oxfordshire is a high-output, high-value local economy, generating around £28bn in Gross Value Added (GVA), comparable in scale to Cambridgeshire and larger than many UK city-region economies. It consistently performs well on headline economic indicators, including employment rates, skills levels and business formation.

6. While aggregate productivity (measured as GVA per hour worked) sits below some immediate comparators such as Berkshire West and Swindon, Oxfordshire remains a national outlier for innovation intensity, research-led activity and high-value firm formation. This combination – strong output, exceptional innovation, but uneven productivity – is central to understanding both Oxfordshire's success and its current constraints.

A globally significant innovation economy

7. Oxfordshire punches well above its weight in innovation. The county hosts one of the largest concentrations of research activity in Europe, anchored by the University of Oxford, Oxford Brookes University, and a network of nationally significant science and research campuses including Harwell, Culham and Milton Park.

8. This has translated into exceptional performance on several fronts:
   - University spin-outs and knowledge-intensive firms have expanded rapidly. The estimated turnover of active University of Oxford spin-outs alone now

runs into the hundreds of millions of pounds, with strong growth also evident from Oxford Brookes-linked firms, whose spin-out turnover has increased by over 400% since the mid-2010s.

- On composite measures of sector performance (employment, firms, GVA and productivity), Oxfordshire ranks among the strongest UK locations for growth in life sciences, digital and data-driven industries, advanced manufacturing and clean energy.
- Life sciences stand out in particular. Employment growth rates imply that, if current trends were sustained, the number of people working in life sciences in Oxfordshire could almost triple over the next decade, underscoring both the opportunity and the pressure this places on the system.
- Oxford's international brand and reputation anchors innovation-led, high-growth activity, investment and tourism – particularly because of proximity or easy access to the two world-leading Universities. There is no doubt that Oxford is the county's "hero" brand. But importantly, this innovation economy is distributed across the county - rather than being concentrated in a single place. It is clustered around multiple science parks and innovation campuses, creating a networked innovation geography rather than a single core.

9. However, Oxfordshire under-realises the local productivity return on globally competitive innovation, with relatively weak diffusion of innovation through value chains across the county. This is in part because of a tendency to think of agglomeration on a place-specific, rather than county-wide basis.

<u>Strong historic performance in attracting external investment, but a weak pipeline</u>

10. Despite capacity constraints, Oxfordshire has performed strongly in attracting external and inward investment. Over the past five years, inward investment activity supported by local partners has secured around £3.6bn of investment and approximately 6,500 jobs, with projects concentrated in science- and technology-led sectors including life sciences, healthcare, advanced engineering and space technologies.

11. This reflects the county's global reputation, built upon its hero brand of the city and universities; institutional depth; and nationally-leading skills base. However, the evidence also shows that the investment pipeline is significantly smaller than in recent years; and that levels of business investment anchored locally (gross fixed capital formation) are materially lower than in some comparator areas, notably Cambridgeshire, suggesting that while firms are locating and operating in Oxfordshire, a smaller share of physical expansion and capital deepening is being realised locally.

<u>A highly skilled workforce – and a very tight labour market</u>

12. Oxfordshire has one of the most highly educated workforces in England:
    - over 60% of working age residents hold a degree or higher qualification, compared with around 48% across the South East and significantly less nationally;
    - qualification rates at all levels exceed regional and national benchmarks.

13. Employment performance is equally strong. The county's employment rate is approximately 84%, among the highest in the UK, leaving very limited spare labour capacity. This combination underpins Oxfordshire's success, but also explains why skills shortages, recruitment difficulties and labour churn are now persistent features of the local economy. In the short term, growth can no longer rely on simply drawing more people into work; it must increasingly come from making better use of existing labour and assets, while longer-term planning for growth takes place.

A polycentric economy with distinct economic roles

14. Oxfordshire is not a single, uniform economy. It is polycentric, with different places playing distinct and complementary roles:
    - Oxford city is unquestionably the county's largest centre of employment and output, dominated by education, health, research and innovation, accounting for around 29% of Oxfordshire's GVA while containing around 22% of its population.
    - The Science Vale and its surrounding area (South Oxfordshire and Vale of White Horse) is a major growth engine, with particularly strong recent performance in life sciences, professional and technical services, advanced manufacturing and clean energy, and some of the highest composite sector growth scores in the county.
    - Cherwell (Banbury and Bicester) plays a distinctive role shaped by advanced manufacturing and logistics, linked to wider supply chains extending into Motorsport Valley, the Midlands and Buckinghamshire, alongside a large and diverse foundational economy.
    - West Oxfordshire is home to a resilient rural and visitor economy, with strong performance and growing international renown in tourism, leisure and local services, relatively robust productivity for its size, and resident earnings that compare favourably with much of the county.

15. These places are connected through overlapping labour markets, commuting corridors and infrastructure systems, forming a functionally integrated but spatially diverse county economy.

A large and essential foundational economy

16. While Oxfordshire is internationally recognised for its innovation strengths, the evidence is clear that most people work outside the frontier economy.

17. Foundational sectors – including health and care, education, retail, hospitality, construction, logistics and local services – employ a large share of the workforce in towns, neighbourhoods and rural areas. Performance in these sectors has a direct bearing on:
    - labour market stability and churn;
    - everyday economic resilience;
    - access to work and services for residents; and
    - the functioning of high-value sectors that depend on them.

18. Their productivity and resilience are therefore economically material, not peripheral.

Growth remains essential – but will take time

19. The analysis is clear that, both economically and in light of Government's intervention, Oxfordshire – and Oxford in particular – does need to grow. Continued growth is necessary to address housing shortages, fund infrastructure and public services, and sustain the county's national and international economic role.

20. However, the evidence and governance context are equally clear that the largest and most consequential growth decisions – particularly those relating to strategic planning, major transport schemes and long-term spatial development – will take time. Many will be taken after Local Government Reorganisation, the potential formation of a Thames Valley Strategic Authority, and through the forthcoming Greater Oxford Development Corporation.

21. Considering a range of competing views on how best to develop Oxfordshire's economy, developing a traditional economic strategy at this time is exceptionally challenging with little apparent room for consensus to emerge. However, those challenges do not provide a justification for inaction in the intervening period.

Prioritising productivity

22. Businesses and residents will continue to experience the pressures of a high-cost, capacity-constrained economy over the next few years: congestion, housing affordability, labour shortages and infrastructure uncertainty. This is likely to worsen as a consequence of geopolitical instability. Simply waiting for future structures and strategies to settle would:
    - weaken business confidence;
    - increase labour churn;
    - worsen congestion and affordability pressures; and
    - make future growth harder to deliver.

23. In this context, there is both a need and an opportunity to shift the county's focus towards increasing productivity. This is not an alternative to growth, and not a rhetorical substitute for development. It is the means by which Oxfordshire can act now to:
    - enable existing firms to grow, invest and retain staff;
    - reduce system frictions in transport, skills, infrastructure and local economies;
    - stabilise foundational sectors that underpin daily life; and
    - make better use of existing labour, land and capital while major growth decisions are prepared.

24. Focusing on productivity now is a holding and enabling strategy during transition, and one that will enable a clarity of focus from the public sector that will deliver better near-term outcomes for businesses and residents – while providing a platform to solve the bigger, more complex and longer-term challenges around planning and infrastructure.

Community wealth-building as an economic development mechanism

25. Prior to and in parallel with the work undertaken by Metro Dynamics, the county has explored how to build community wealth.

26. Community wealth building (CWB) is best understood in Oxfordshire as an economic development tool rather than a parallel social agenda. In a high value, high employment economy operating close to capacity, long term prosperity depends not only on how much value is created, but on how far that value is retained, circulated and reinvested locally.

27. The evidence underpinning this paper shows that a significant share of economic value generated in Oxfordshire does not remain in the county for long. This limits reinvestment in skills, firm capability and local supply chains, weakening the resilience and cumulative productivity of the wider economy. CWB addresses this directly by strengthening local economic multipliers through procurement, supplier development, locally anchored ownership and investment.

28. In a very tight labour market, CWB also operates as a productivity and stability lever. High churn in foundational and place-based sectors imposes real economic costs, increasing recruitment pressure across the system. By supporting locally rooted firms, improving workforce stability and strengthening progression pathways, community wealth building helps reduce friction and sustain performance in the everyday economy on which higher value activity depends.

29. Crucially, CWB enables place-based economic delivery. Stronger local business ecosystems, town centre economies and local supply chains reduce pressure on growth locations, improve access to opportunity, and help ensure that growth elsewhere in the system does not generate adverse knock-on effects.

30. CWB should therefore be seen as a delivery mechanism within the Investment & Productivity Plan: anchoring productivity gains, reinforcing resilience during a period of transition, and ensuring that future growth decisions land in a system that is stronger, not more brittle.

Why an Investment & Productivity Plan is needed now

31. The analysis supports the case for a clear, focused Investment & Productivity Plan for up to the next five years, designed to operate alongside – not in place of – longer-term growth strategies.

32. Such a Plan would:
- provide focus and discipline during LGR;
- align existing programmes and investment decisions;
- support businesses and communities through near-term pressures; and
- ensure that decisions taken now do not undermine tomorrow’s agendas.

33. It would not be:

- a statutory spatial plan;
- a comprehensive list of projects; or
- a replacement for the work of an Oxford Development Corporation.

34. The Investment & Productivity Plan will not be a simple activity-and-funding matrix. It will be developed along the lines of a Local Growth Plan, setting out:
    - an economic model and narrative for Oxfordshire;
    - clear spatial and sectoral/cluster focus;
    - a small number of high-impact interventions that will drive productivity;
    - sequencing of action over the next few years; and
    - alignment of existing levers and resources, including partnership delivery mechanisms.

35. It will also provide the basis to develop a similar framework across the Thames Valley, enabling greater coherence at a wider economic scale over time.

Partnership and next steps

36. Delivery requires collaborative system stewardship, not new structures. Oversight should operate through partnership, focusing on prioritisation, sequencing, problem-solving, and building and delivering a pipeline of interventions. This will require genuine collaboration across the local government, private, and education sectors. While Oxfordshire benefits from a number of such collaboration structures, few of them are directly related to – or have levers concerning – delivery. One such vehicle is Enterprise Oxfordshire – further information on which is included in Annex E.

37. Over the coming weeks, the next steps are to:
    - Test priority objectives and thematic areas of intervention with partners;
    - Identify, prioritise and sequence interventions across thematic areas;
    - Align with funding and resources;
    - Develop partnership oversight arrangements; and
    - Develop the Investment & Productivity Plan;
    - Bring proposals to Cabinet in July.

Corporate Policies and Priorities

38. The work to develop an economic strategy and Investment & Productivity Plan is closely aligned with Oxfordshire County Council's current Strategic Plan, which sets out the Council's vision of "a greener, fairer and healthier county," and a focus on delivering meaningful change during a period of Local Government Reorganisation and wider system reform.

39. Rather than introducing a parallel agenda, the Investment & Productivity Plan will provide an economic framework that reinforces and enables delivery of the Corporate Plan's priorities, particularly in relation to inclusive growth, infrastructure, climate resilience and long-term financial sustainability.

Financial Implications

The financial implications section should be completed by a member of the finance service

40. There are no direct financial implications arising from this report. However, the proposed Investment & Productivity Plan – which will be recommended to Cabinet in July – will propose a number of new investment decisions. If there are any net costs to Oxfordshire County Council as a result of the new investment decisions, officers will present them at the July Cabinet meeting along with funding options.

    Comments checked by:

    Name, Title, email (Finance)

Legal Implications

The legal implications section should be completed by a member of the legal service

41. There are no direct legal implications for the Council arising from this report, which has been developed within the existing statutory powers of the Council, specifically the Council's general power of competence under Section 1 of the Localism Act 2011.

42. The English Devolution and Community Empowerment Bill which is currently at Committee Stage in the House of Commons introduces a new statutory basis for Strategic Authorities, including Combined County Authorities, with defined powers over skills and employment support. As these provisions progress, further legal consideration may be required to reflect any new responsibilities or commissioning powers transferred to the area.

43. Any legal implications that arise through the development and delivery of the proposed Oxfordshire Investment & Productivity Plan will be considered and assessed at that time and before any recommendations are brought forward for decision.

    Name, Title, email (Legal)

Staff Implications

44. This report does not in itself have direct staffing implications, as it does not introduce new programmes, structures or service delivery requirements. Any staffing implications will arise, if at all, through the development and delivery of the proposed Oxfordshire Investment & Productivity Plan. These implications – including the use of existing staff resources, partnership capacity and any need for additional or re-prioritised roles – will be considered and assessed as part of

the Plan's development, and reported to Cabinet before any recommendations are brought forward for decision.

Equality & Inclusion Implications

45. This paper does not in itself propose specific policies, programmes or decisions with direct equality or inclusion impacts. Its focus on productivity, system coherence and spatial prioritisation is intended to support inclusive economic outcomes over time by improving access to opportunity, workforce stability and the functioning of everyday economic systems across Oxfordshire. The detailed equality and inclusion implications will be assessed as part of the development of the proposed Oxfordshire Investment & Productivity Plan. An appropriate Equality Impact Assessment will be undertaken and considered before any recommendations on the Plan are brought forward to Cabinet for decision.

Sustainability Implications

46. This report does not in itself commit the Council to specific projects or interventions with direct environmental or sustainability impacts. Its emphasis on improving productivity through better system alignment is intended to support more sustainable patterns of growth over the longer term, including more efficient use of resources and reduced system-level friction. Detailed sustainability implications will be considered as the proposed Oxfordshire Investment & Productivity Plan is developed. These implications will be assessed as part of the plan's preparation, and any relevant environmental or sustainability assessments will be undertaken and considered before recommendations are brought forward to Cabinet for decision.

Risk Management

47. This report does not create new delivery programmes or financial commitments; however, it identifies risks associated with fragmentation, misalignment and loss of momentum during a period of institutional and strategic change. These risks are addressed by providing a clear evidence-led framework to guide prioritisation, coordination and sequencing of economic decisions in the near term. The principal delivery and financial risks will arise through the development and implementation of the proposed Oxfordshire Investment & Productivity Plan, including risks related to capacity, partner alignment and external dependencies. These will be identified, assessed and managed through the Council's existing risk management and governance arrangements as the Plan is developed, and will be reported to Cabinet as part of any subsequent recommendations.

Consultations

48. The analysis underpinning this report has been informed by engagement undertaken with partners across Oxfordshire over time, drawing on existing evidence, insight and collaborative working rather than a formal public consultation exercise. Further consultation is not proposed at this stage.

Robin Rogers
Director of Economy & Place

Annex:	Annex A: Future Oxfordshire Strategy – summary and next steps
	Annex B: Report 1 – Analysis of the Oxfordshire economy and delivery environment
	Annex C: Report 2A – Analysis and priorities to address county-wide constraints
	Annex D: Report 2B – Spatial economic strategy and delivery framework
	Annex E: Enterprise Oxfordshire - overview
Background papers:	Nil
Contact Officer:	Nick Glover, Head of Future Economy nicholas.glover@oxfordshire.gov.uk 07855 447 686

May 2026

Metro——Dynamics

Future Oxfordshire Strategy – Summary and Next Steps

Final Draft 30 March 2026

This note summarises the main findings and recommendations arising from Metro Dynamics' consultancy work for the development of the Future Oxfordshire Strategy, with suggestions around next steps for the county council to consider for implementation.

The project aims to deliver a comprehensive analysis of Oxfordshire's opportunities and challenges regarding managed growth, utilising economic analysis and stakeholder input. It provides thematic and spatial recommendations intended to guide economic development strategy and delivery during Oxfordshire's ongoing organisational transition, providing stable foundations and growth ambitions for business and investors. The outputs of this work have been divided into three reports:

- Report 1: Analysis of the Oxfordshire economy and delivery environment
- Report 2A: Analysis and potential priorities to address County-wide constraints
- Report 2B: Recommendations for economic strategy and spatial priorities

Recommendations for immediate next steps

You are in a strong place to build out the priorities into a workplan and to mobilise delivery around this. This is the opportune moment for this work with UKSPF funding ending and a need to set out arrangements that can feed through and adapt into devolution and LGR.

We suggest as immediate next steps that you:

- Build out the narrative and priorities into an economic growth strategy and delivery plan for Oxfordshire, focused on the next three years. Pilot the spatial priority approach with Banbury & Bicester and Science Vale.
- Engage with the Oxford Growth Commission to ensure the county's growth strategy informs and works with its outputs, including providing additional material as needed.
- Undertake work to agree the strategic and co-ordinated approach to economic development across Oxfordshire that moves forward alongside LGR. This could involve existing elected members working together to consider how best future economic development delivery in Oxfordshire maximises impact and optimises resources. This could include developing agreed criteria, principles, ways of working, and governance, as well as how to reduce transaction costs and duplication, the role of existing vehicles such as Enterprise Oxfordshire (EO), and funding routes such as from Enterprise Zones.
- Given the importance of inward investment, work with Equinox, the city and university to shape this as part of a co-ordinated spatial approach to economic development. This could take a wider strategic view of the county's approach to investment and business attraction, for example, consider using Oxford consistently as the outward facing brand.

branding.

Overall strategic position

Oxfordshire is a globally recognised innovative economy, anchored by world-class universities and a network of major science, research and business campus', giving it strong growth potential in the Industrial Strategy-8 sectors of life sciences, digital technologies, advanced engineering, and clean energy. Alongside Oxford City sit nationally important clusters such as Science Vale, strategically connected towns in Cherwell that are seeing a specialism around future mobility sectors, and the high-quality rural and market-town economy of West Oxfordshire, which plays a vital role through the visitor economy as well as defence assets and growing sector specialisms.

The county's growth is constrained by a set of structural and spatial challenges; productivity growth has lagged key comparators, high-value and investment are concentrated in a limited number of locations, and economic benefits are unevenly distributed across the geography. Acute housing affordability, misalignment between housing and employment locations, transport connectivity gaps, a tight labour market and mid-level skills shortages are limiting productive knowledge exchange, labour mobility and business expansion. Report 2A identifies a small number of county-wide priorities that are critical to framing how to address these constraints.

The case for managed growth

Oxfordshire County Council (OCC) is committed to increasing productivity and improving the quality of life for all residents. The county's ambition is for an economy that is cleaner, fairer, and more resilient – one that supports thriving communities today and protects the interests of future generations. It has developed a definition and approach to growth that reflects these objectives: managed growth. Growth must be managed carefully so that it alleviates, rather than adds to, the pressures people experience. Any further growth in Oxfordshire must be delivered in a way that strengthens environmental commitments and enhances community wellbeing. Decisions about growth must reflect the needs of future generations as well as those of today, ensuring that Oxfordshire remains a prosperous, inclusive and sustainable place to live for decades to come.

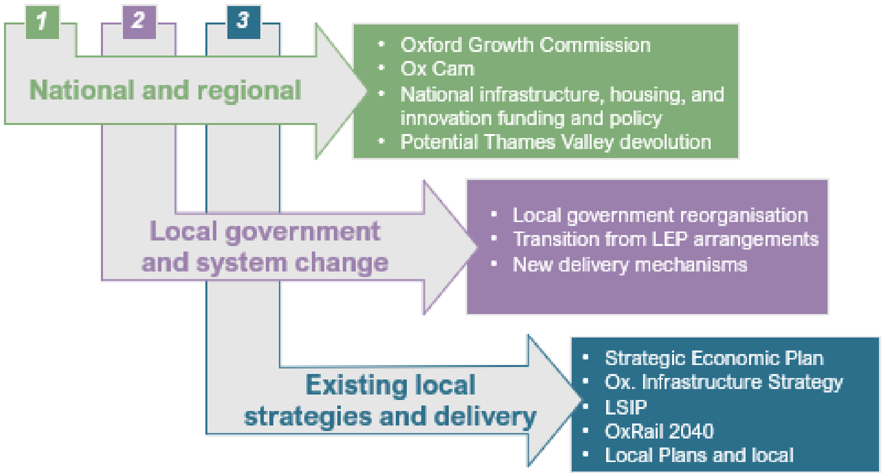
To achieve this, Oxfordshire will work closely with Government and local partners to address the key constraints that limit sustainable growth. This includes securing investment in transport, digital connectivity, and wider infrastructure that enables the county to plan for and accommodate future housing and economic development. By doing so, Oxfordshire can meet nationally set housing requirements while ensuring that new development is supported by the infrastructure it needs. Through strong partnerships, targeted investment, and a clear focus on sustainability and fairness, the county aims to guide Oxfordshire's growth in a way that delivers long-term prosperity and a better quality of life for all.

Delivering managed growth is the principal objective that this work has considered. We have looked at where and how the county is currently performing on productivity and quality of life and set out here recommendations on economic development focus in the near-term.

County wide delivery mechanisms

Economic development in Oxfordshire is currently delivered through a fragmented but active system, with the County Council's role largely delivered through Enterprise Oxfordshire, alongside activity by districts and wider civic partners. OCC's role focuses on county-wide economic leadership, infrastructure, transport, skills and place-shaping, while Enterprise Oxfordshire leads inward investment, business support and sector promotion, including a strong track record in attracting science and technology-led investment.

Existing economic development priorities were set through OxLEP's Strategic Economic Plan, which focuses on enabling businesses to thrive and innovate, widening access to opportunity and skills, securing resilient infrastructure for managed growth aligned with net zero ambitions, and ensuring that Oxfordshire's places are sustainable, inclusive and support flourishing communities. OCC is also bringing forward a number of strategies including the Oxfordshire Infrastructure Strategy and OxRAIL 2040 which will have an influence on economic development approaches.



Our first report took stock of the current evidence, strategies and delivery and identified:

- Oxfordshire is a complex economic unit, with a global, high-growth potential innovation city, high-tech science and business assets, large and small towns and a range of sectors from technical to agriculture to retail and leisure, with several economic areas
- There is a breadth and depth of economic opportunity and barriers to growth to address, and also genuine potential to make this next phase of growth more inclusive and sustainable
- There is a lot of live economic development activity led by many different government actors for different geographies and aims – OxCam Corridor, Oxford Growth Commission and Thames Valley in the future – in addition to investor-led activity
- At the Oxfordshire level, there are a collection of strategies that focus on broad thematic interventions, including inclusion, sustainability, infrastructure and innovation – it has historically been challenging to galvanise shared consensus and action
- There is a need for an overall theory for economic growth that reflects and responds to the specific spatial and sectoral complexity of the economy.
- There is a risk that without this, and a portfolio of specific projects to unlock growth within it, other actors will focus selectively on specific interventions that will not be sufficient to enable growth and deeper benefits for residents and businesses.

- This is compounded by ongoing change in the local government environment, complicating the geography at which to act – however the growth opportunities are live now regardless of administrative structures.
- Partnerships have begun to fill this gap, e.g. Equinox, but a wider range of strategic actions may be required now, next and in the future.

Moving forward – recommendations for spatial and cross cutting priorities to deliver managed growth

Reports 2A and 2B set out the case for a new approach that looks at the pan-Oxfordshire thematic priorities required to address structural barriers to growth. These are complemented by spatial growth opportunities that reflect the complexity and polycentric growth centres across the county.

Crosscutting priorities (Report 2A)

Business, sectors and investment

Oxfordshire's innovation-led growth is strong but highly concentrated, with inward investment and high-value sectors clustered around a small number of locations. While the county performs well in attracting external investment, a lower share of business investment is being anchored locally, limiting productivity gains and job creation. Oxfordshire also has a large and diverse SME base but support is fragmented and not consistently aligned to sector strengths or growth opportunities.

Recommendation: To drive greater value from inward investment and cluster development, while strengthening productivity and growth across the wider SME base through a more integrated, sector and place focused approach to investment promotion and business support.

Labour market and skills

Oxfordshire has one of the tightest labour markets in the country, with high average qualification levels and strong participation, but this is masking persistent and growing skills shortages, particularly in mid-technical roles. Barriers linked to housing affordability, transport accessibility and uneven access to training limit labour mobility and participation, especially for young people, disadvantaged groups and residents of rural and market-town areas.

Recommendation: Build on the work of the LSIP by developing Community Skills Plans that embed skills into Oxfordshire's wider economy strategy by aligning employers, FE, schools and partners around current and future labour market demand

Housing

Housing affordability is identified as a major structural constraint on Oxfordshire's economic performance, affecting labour supply, business competitiveness and public confidence in managed growth. Recent delivery has been misaligned with employment locations and transport connectivity, reinforcing car dependency and limiting access to jobs, particularly for lower-and-middle income, while general under delivery continues to put upward pressure on price levels.

Recommendation: To treat core economic enabler, with a stronger emphasis on aligning housing delivery with infrastructure, employment land and labour market access

Need for a spatial focused approach to economic development (Report 2B)

A spatially focused approach to economic development is essential in Oxfordshire because the county's growth opportunities and constraints are not evenly distributed or the same but are shaped by a highly varied polycentric economic geography. While challenges such as skills shortages, housing affordability, infrastructure capacity and investment concentration are shared across the county, the way these issues interact, and the levers available to address them, differ markedly between more urban areas, growth corridors, market towns and rural economies. A purely thematic approach risks diluting impact by apply broader solutions to problems that are inherently shaped by local circumstances.

A spatially focused approach provides a practical framework for targeting intervention where it can unlock growth, align public and private investment, and ensure that county-wide priorities are delivered in ways that reflect the distinct economic roles different parts of Oxfordshire play within a single, interconnected economy.

This work has identified the following areas as Oxfordshire's key distinct growth areas.

- Banbury & Bicester
- Oxford City
- Science Vale
- West Oxfordshire

Figure 1. Spatial Framework and Recommendations

Spatial Area	Findings	Recommendations
Banbury & Bicester	Banbury and Bicester are major housing and employment locations within Oxfordshire, with strong strategic connectivity via the M40 corridor and links beyond the county. Their economies and urban areas are distinctive from each other but are characterised by a mix of large-scale logistics, advanced manufacturing, emerging clean tech and future mobility activity, alongside a growing visitor economy. However, growth to date has been weighted towards foundational and space-intensive sectors, with risks around place quality, skills alignment, town-centre vitality and the ability to capture higher-value activity	• Strengthen and scale advanced engineering, clean-tech and future mobility, leveraging its position within Motorsports Valley and Bicester Motion as an asset, by using better evidence on commercial space needs to shift growth towards higher-value, innovation-led activity • Align technical training, skills progression and visitor-economy workforce planning with growth sectors, ensuring local residents can access opportunities in Banbury, Bicester and across wider Oxfordshire • Support sustainable growth by aligning housing delivery with infrastructure, employment access and town-centre renewal strengthening liveability and economic resilience

Oxford City	Oxford City is the primary engine of Oxfordshire's economy, anchored by globally significant universities, hospitals and research assets that drive strong growth in life sciences, digital and other knowledge-intensive sectors. Oxford West End, Oxford North, and the Cowley Branch Line reopening create an opportunity to reshape the city's housing, mobility and innovation ecosystem However, its economic potential is increasingly constrained by severe shortages of housing and commercial space, transport bottlenecks and deep spatial inequalities, limiting agglomeration and the city's ability to sustain and broaden growth benefits	• Align Oxford's spatial development, commercial space and business support with the needs of its core sector ecosystems, particularly life sciences and digital, to enable agglomeration, provide investor clarity, strengthen supply chain linkages, and support a coherent, sector-led growth narrative • Unlock Oxford's growth capacity by accelerating housing delivery, transport, digital and energy infrastructure, supported by strong engagement through the Oxford Development Corporation • Tacke deep-seated inequalities in south-east Oxford through a hyper-local approach that integrates skills, employment, health and public services, while also preparing for use of future devolved levers to improve outcomes and ensure growth benefits are more widely shared
Science Vale	Science Vale represents a concentrated corridor of nationally important science, research and technology activity, underpinned by major campuses and Enterprise Zones that are driving growth in high-value, science-led sectors. However, its potential is being held back by fragmented governance across sites, limited sustainable transport options, and pressures on housing and workforce access, meaning growth is not yet functioning as a coordinated or fully integrated economic cluster.	• Establish a streamlined Science Vale partnership to coordinate delivery across existing strategies, strengthen links with OxCam Corridor, and promote the corridor through a clear, shared narrative that showcases its innovation assets, business opportunities and career pathways • Scale cluster and sector development across science parks and Enterprise Zones, align planning and investment pipelines through closer collaboration between site managers and local authorities, and improve connectivity to key employment sites • Improve connectivity to key employment sites within Science Vale, building on the Ox Rail 'Science Line' concept, whilst also progressing planned HIF-funded infrastructure at pace • Build a place-based labour market and skills system aligned to employer demand, invest in career pathways, and work with partners to ensure Science Vale develops as a thriving, connected place to live and work with the housing, amenities and services needed to support long-term growth

West Oxfordshire	West Oxfordshire is a predominately rural and market-town economy with high quality of life, relatively strong productivity and earnings, and an economic base anchored in the visitor economy and foundational sectors Strategic assets (e.g. RAF Brize Norton, farming and land-based activities, and proximity to Motorsports Valley and future mobility clusters) provide a strong foundation for deeper integration with the wider county innovation economy However, its future growth and resilience are constrained by housing affordability and under-delivery, and weaker connectivity to higher-value employment centres elsewhere in Oxfordshire, limiting labour market access and spillover from the county's innovation economy	• Use housing delivery and strategic transport investment to improve workforce retention, affordability and labour-market access, while strengthening productivity in West Oxfordshire's visitor and foundational sectors • Improve connectivity and labour-market integration by championing the Carterton–Witney–Oxford corridor and other strategic transport improvements along the A40, reducing car dependency and widening access to higher-value employment opportunities across the count • Position West Oxfordshire as a connected contributor to Oxfordshire's innovation economy by linking defence assets, land-based industries and visitor economy ecosystem to county-wide sector and skills opportunities

Conclusion

In summary, this spatial economic delivery framework is deliberately different from previous county- and district-level strategies. It focuses on a small number of high-impact, place-specific interventions delivered collectively by partners. The framework prioritises near-term actions (over the next 1–3 years) that directly unlock local growth opportunities and address key constraints, rather than broader, longer-term objectives. It is designed to align and adapt existing and new interventions across districts, the county and Enterprise Oxfordshire, supported by clear mechanisms for collective leadership and delivery.

In thinking about design and delivery of future economic development functions we suggest the following principles:

- No one Local Authority can afford to do everything that is needed, now or post LGR. Pooling and sharing expertise and capacity is important. Oxfordshire must avoid duplication, simplify the landscape and maximise impact against agreed priorities.
- Different parts of the county have different economic drivers, growth opportunities and strengths, but all share infrastructure and connectivity barriers. Delivery needs to reflect both.
- Oxford is the global brand and the whole county benefits from the brand in investment markets and attraction. The Growth Commission is a chance to increase Government investment and interest that will benefit the whole county – if it shapes delivery accordingly.
- Delivery should be designed to maintain and accelerate progress through LGR, Ox-Cam, and Devolution discussions and not be slowed down by administrative changes. Allow for potential to scale to act at regional level.

As an immediate next step, we have suggested that you convene a group of existing elected members to agree delivery principles and mechanisms for economic development across Oxfordshire. There are already regional organisations such as Enterprise Oxfordshire, which has had a critical role to play in Oxfordshire's economic development. We suggest that you prioritise providing a stable, credible and business-facing delivery vehicle at a time of local government reorganisation and wider policy uncertainty. A shared county-wide resource can convene partners, maintain momentum through institutional change, and deliver priority functions such as inward investment, cluster development and the coordination of place-based growth propositions across administrative boundaries. This will likely require additional capacity alongside closer, structured collaboration with district authorities and local stakeholders.

Strengthening Oxfordshire's economic development resource and its interface with local partners will be essential to translate strategic priorities into practical, place-specific action and to sustain effective collective leadership across Oxfordshire.

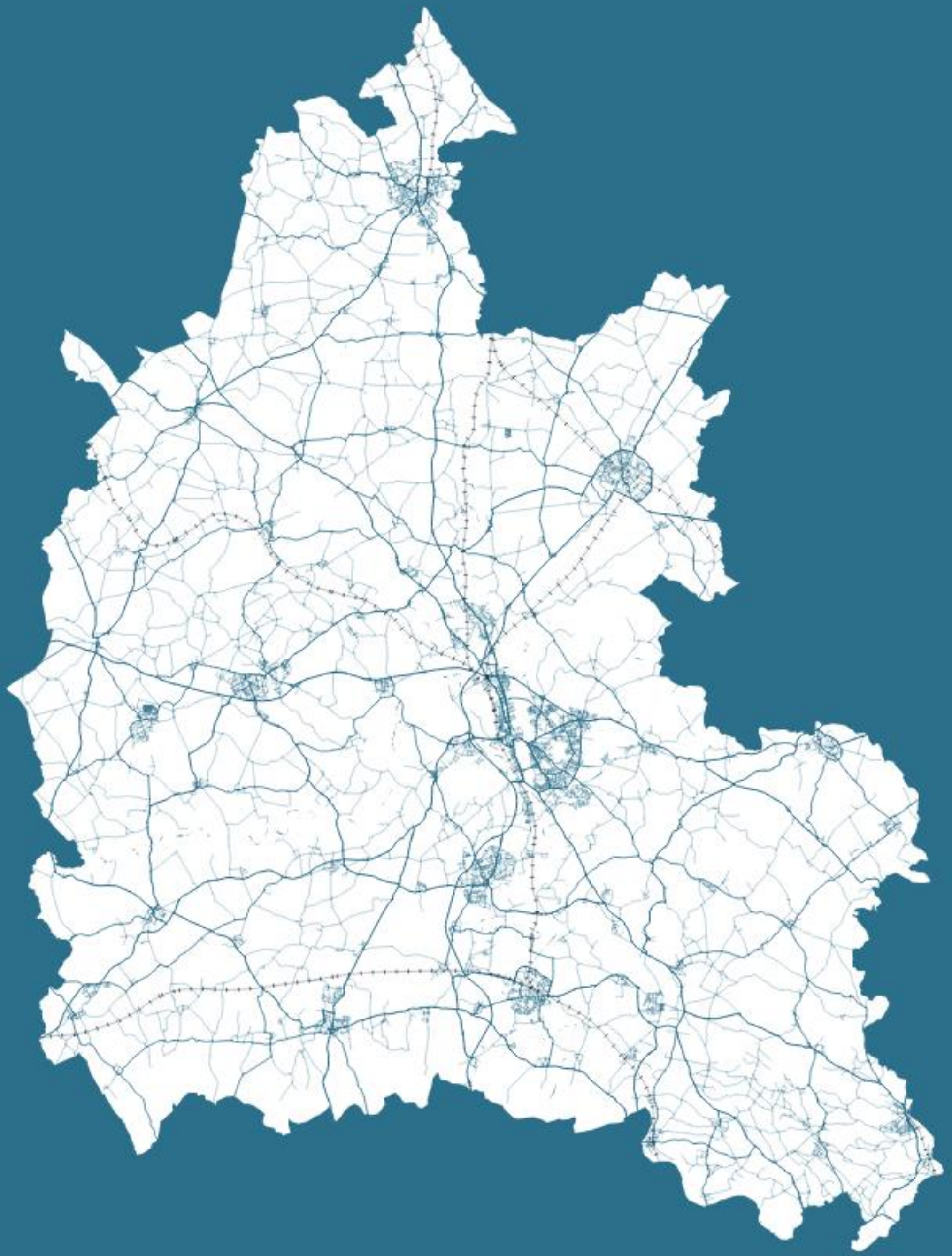
Metro——Dynamics

Future Oxfordshire Strategy

Phase 1 Report

Analysis of the Oxfordshire economy and delivery environment

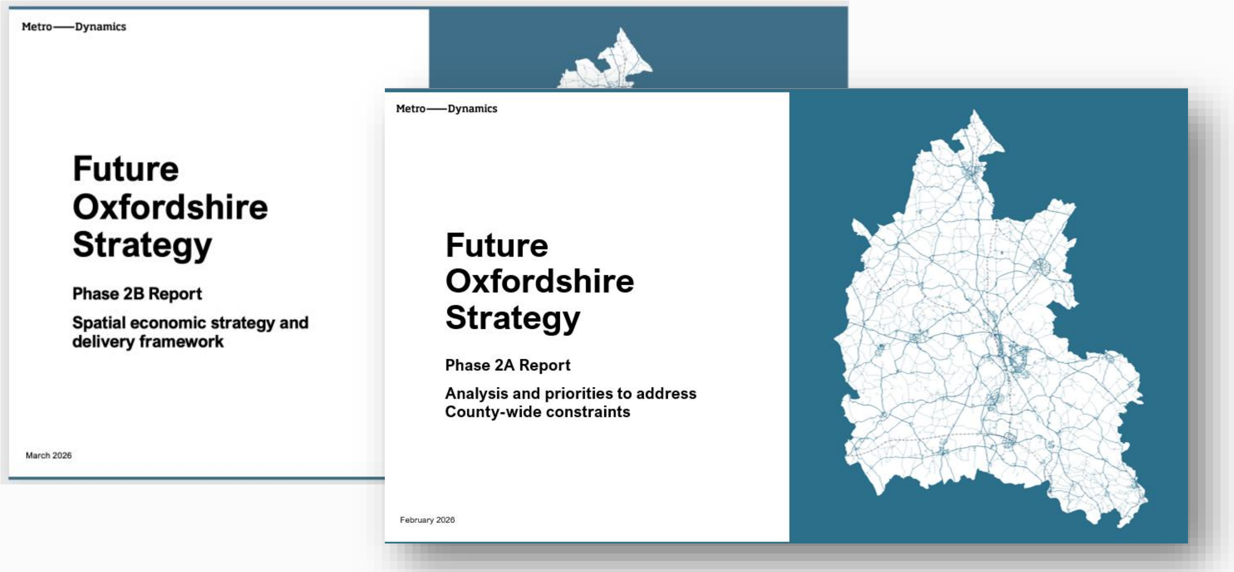
November 2025



Summary of Phase 1 and Next Steps

Introduction to this report

This report is the first output of the Future Oxfordshire Strategy project; this report assesses the structure, composition, performance and delivery environment of the Oxfordshire economy, to scope what is needed to advanced economic development in the county.



It is followed by two other reports from this project: Phase 2A, which set out Oxfordshire-wide strategic economic priorities, against clear evidence of growth opportunities and constraints. Phase 2B builds from both reports, including translating county-wide priorities into key spatial economic areas.

.

Phase 1 has reviewed Oxfordshire's economy and delivery system, to understand where strategic economic focus is needed

In phase 1, we have reviewed existing strategies and current economic performance and characteristics and held discussions with a range of county and district council officers, with Oxfordshire Cabinet Members and partners from business and the university.

The aim of this has been to understand the specific dynamics and needs Oxfordshire's economy and delivery system, to identify what is needed from a Future Oxfordshire Economic Strategy and economic development model. At a headline summary, this review has highlighted 3 key factors at play in this environment, that inform the response that Oxfordshire could deploy:

1. **Economy** – Oxfordshire is a complex and diverse economy of sectors, employment centres and labour markets that have distinct roles, with different geographies and opportunities to address.
2. **Leadership and partnership** – Public sector economic leadership has been variable - historically, the county has not fully leant in. Shared ambition consensus and action is required to make the most of the county's growth potential
3. **Delivery** – Two tier system and LEP transition means that priorities for growth and levers to make an impact are fragmentated between different organisations, with high-profile Government and private actors creating an active yet unaligned delivery system

A complex economy and delivery environment, significant opportunity and barriers

- **Oxfordshire is a complex economic unit**, with a global, high-growth potential innovation city, high-tech science and business assets, large and small towns and a range of sectors from technical to agriculture to retail and leisure, with several economic areas
- **There is a breadth and depth of economic opportunity and barriers to growth to address**, and also genuine potential to make this next phase of growth more inclusive and sustainable
- **There is a lot of live economic development activity led by many different government actors for different geographies and aims** – OxCam Corridor, Oxford Growth Commission and Thames Valley in the future – in addition to investor-led activity
- **At the Oxfordshire level, there are a collection of strategies that focus on broad thematic interventions**, including inclusion, sustainability, infrastructure and innovation – it has historically been challenging to galvanise shared consensus and action
- There is a need for an overall theory for economic growth that reflects and responds to the **specific spatial and sectoral complexity of the economy.**
- There is a risk that without this, and a portfolio of specific projects to unlock growth within it, other actors will focus selectively on specific interventions that **will not be sufficient to enable growth and deeper benefits for residents and businesses.**
- **This is compounded by ongoing change in the local government environment**, complicating the geography at which to act – however the growth opportunities are live now regardless of administrative structures.
- Partnerships have begun to fill this gap, e.g. Equinox, but **a wider range of strategic actions may be required now, next and in the future.**

Metro——Dynamics

Different constraints and opportunities to address in different places, and an opportunity to make the whole greater than the sum of its parts

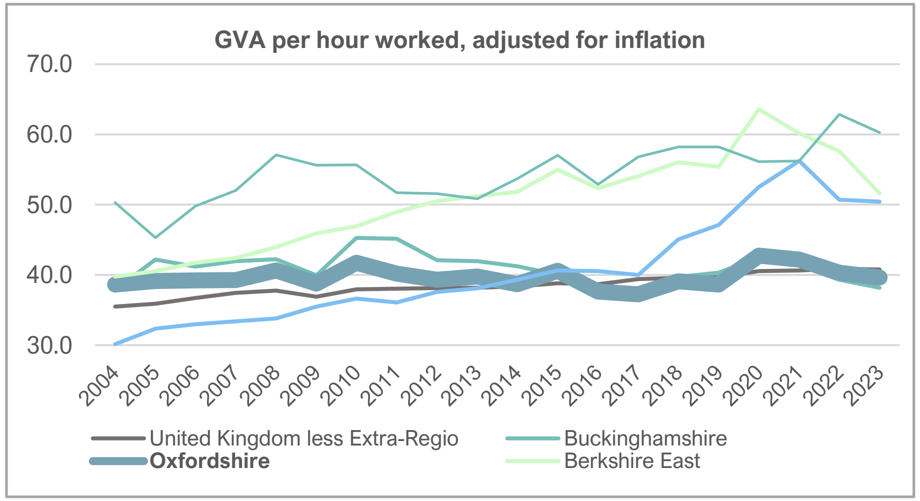
Area	Economic characteristics		Economic development approach		
	Strengths and opportunities	**Challenges and constraints**	**Priority actions**	**Outcomes targeted**	**Strategy and delivery Qs**
Oxfordshire	• Diverse sector strengths and multiple growth points	• Overall productivity stagnant and lagging behind neighbours • Combined with housing costs means lower GDHI than neighbours	• County wide skills support delivery, infrastructure and transport investment	• Above national average productivity and output growth	• What does good growth look like for each area? What are we trying to achieve? • What are the key opportunities to focus on to get there? • What does a networked and integrated county wide and area-based approach look like? • What makes sense to mobilise early to make an impact?
Greater Oxford	• Productivity growth higher than rest of County and UK • Global innovation and research assets	• Residential growth needed to meet growth needs • Physically constrained and small housing sites	• Integrated housing and infrastructure delivery • Coordinated inward investment	• Above County average productivity and output growth • Increased scale up	
Major connected towns – Banbury and Bicester	• Large planned / committed housing sites • Strong road and rail connections out of County • Strong employment and growth in advanced manufacturing, logistics	• Resi capacity w/o planned sites • Shrinking high employing sectors – manufacturing, retail and wholesale, agrifood, other services • Limited connectivity in County • Matching local mid level skills	• Support to sector and growth projects, across Oxfordshire boundaries • Housing and employment site delivery	• Growth in sectors maximising regional / national connectivity	
Abingdon-Didcot-Harwell-science parks corridor (Science Vale +)	• Science and innovation assets, growth businesses • Potential residential land capacity underused connecting corridor	• Constrained housing supply and infrastructure for growing labour market • Gap in innovation infusion into business base • Lack of space for scaleups • Matching local mid level skills	• Coordinated inward investment and promotion • Integrated infrastructure and housing delivery	• Growing investment in science parks • More new businesses, scaleups and innovation diffusion increasing growth	
West Oxfordshire	• High quality of life • High visitor economy employment • Planned housing growth	• Housing affordability and under-delivery • High car dependency • Limited spillover into higher-value sectors	• Unlock housing as an economic enabler • Support productivity improvements in visitor and foundational sectors • Skills and transport interventions	• Sustained high productivity • Stronger integration with county innovation economy • Diversified economic activity	

Findings from Phase 1: Economy

Oxfordshire's economy contains several different components which vary in economic activity and performance

As an economic unit, Oxfordshire's productivity sits below comparators - and has seen relatively stagnant growth over the last 20 years. In 2023, productivity in Oxfordshire stood at around £40 per hour worked, compared with £52 in Berkshire West, and £60 in Swindon. This varies between places – productivity has grown by 18.1% in Oxford since 2019, compared to 7.2% in Cherwell. **This lower and uneven productivity is reflected in household incomes.** Gross Disposable Household Income (GDHI) per head in Oxfordshire (£26,621) sits well below nearby high-performing areas such as West Berkshire (£28,281) and Buckinghamshire (£30,659). Economic activity in Oxfordshire is uneven, with a set of urban and corridor-based clusters generating a large share of output. Oxford dominates in knowledge-intensive industries. Rural and market-town areas contribute less to overall GVA, reflecting differences in sectoral mix, business density and access to infrastructure.

Overall, Oxfordshire punches above its weight in global innovation, but prosperity is less evenly spread and shared than in Berkshire or Buckinghamshire.

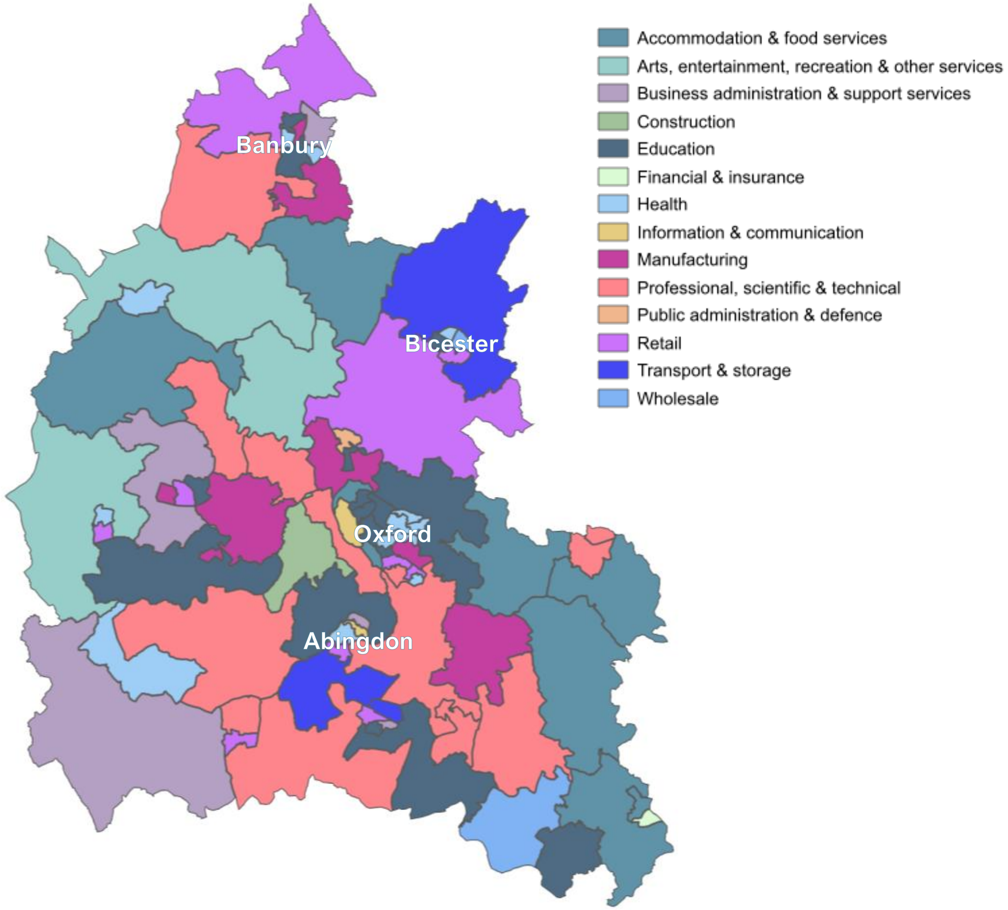


GVA variation across Oxfordshire

Source: ONS Subregional Productivity

Employment patterns reflect a diverse economic base, not solely based on professional, science and technical activity

Mode sector of employment by MSOA



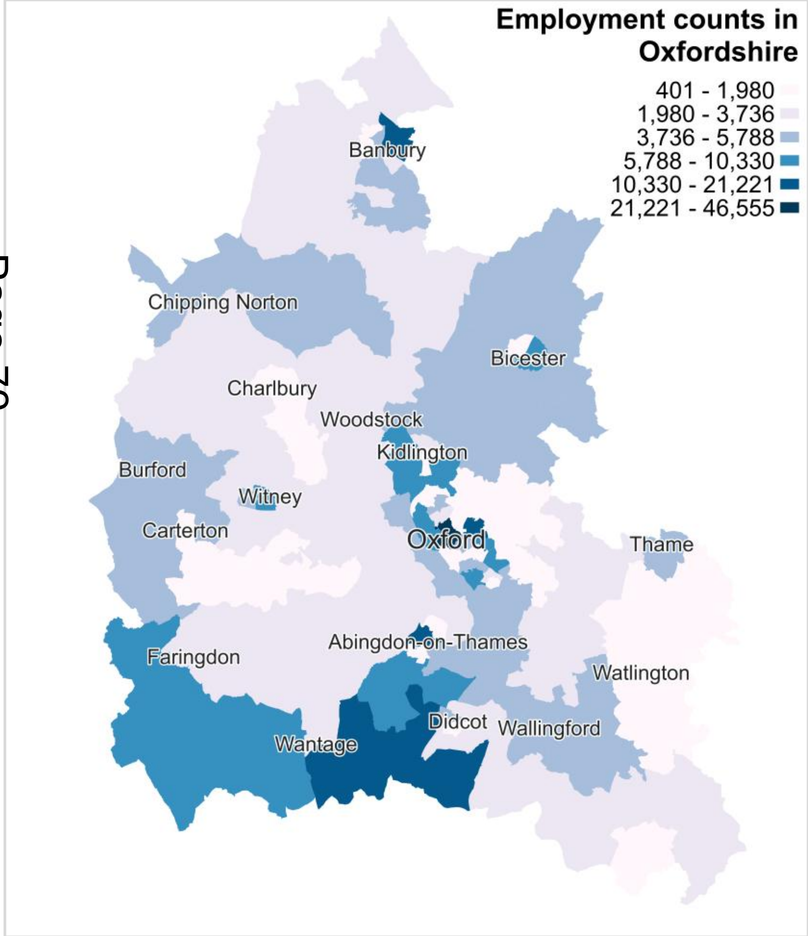
Page 69

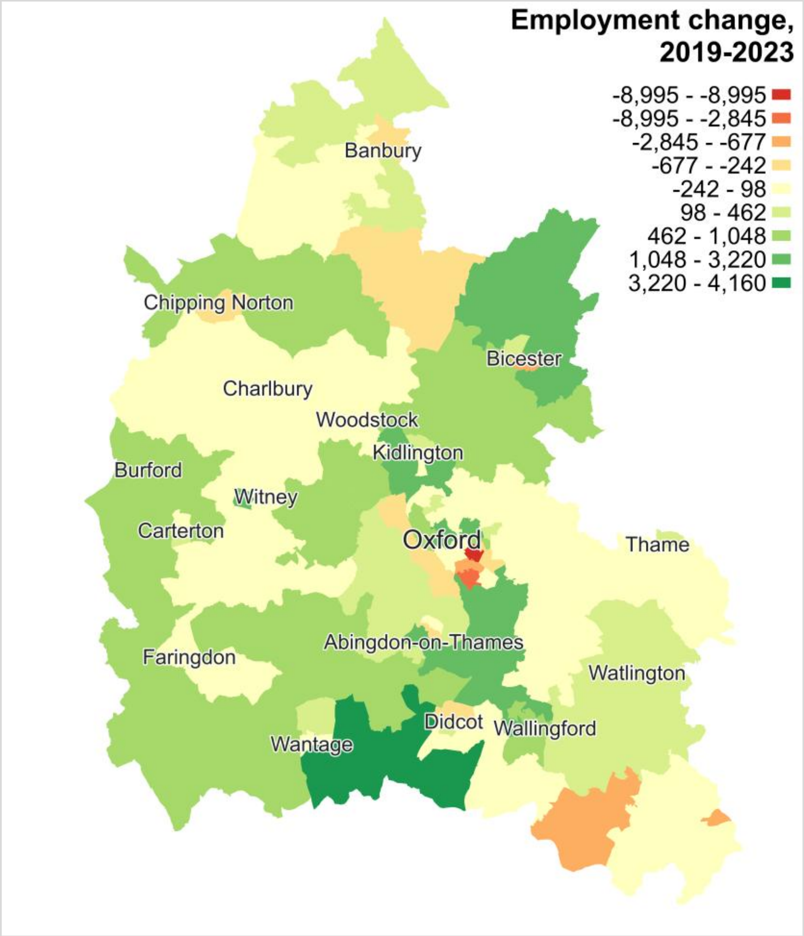
This map shows the most common employment sector in each MSOA across Oxfordshire, demonstrating the variation in types of economic activity and is distinct yet connected economic areas. This is also reflected in varied GVA output across sectors between the Oxfordshire districts with connections outside of the county boundary – advanced manufacturing around Banbury looks to the UK's Motorsport Valley, for example, across the OxCam corridor and into the Midlands.

For Oxfordshire's economic strategy, there is likely a range of growth opportunities linked to these differing economic characteristics as well as differing constraints and barriers to address.

Source: BRES, 2023

Oxfordshire’s major growth locations





Page 70

Employment levels are highest in Oxford and other urban areas, as well as around Harwell, reflecting the current concentration of jobs across the county.

However, changes since 2019 show that recent employment growth has been concentrated in peri-urban locations, **including around Bicester, towns across South Oxfordshire, and the Harwell area.**

By contrast, Banbury and Didcot town centres have seen employment decline, while South Oxford has experienced particularly significant job losses.

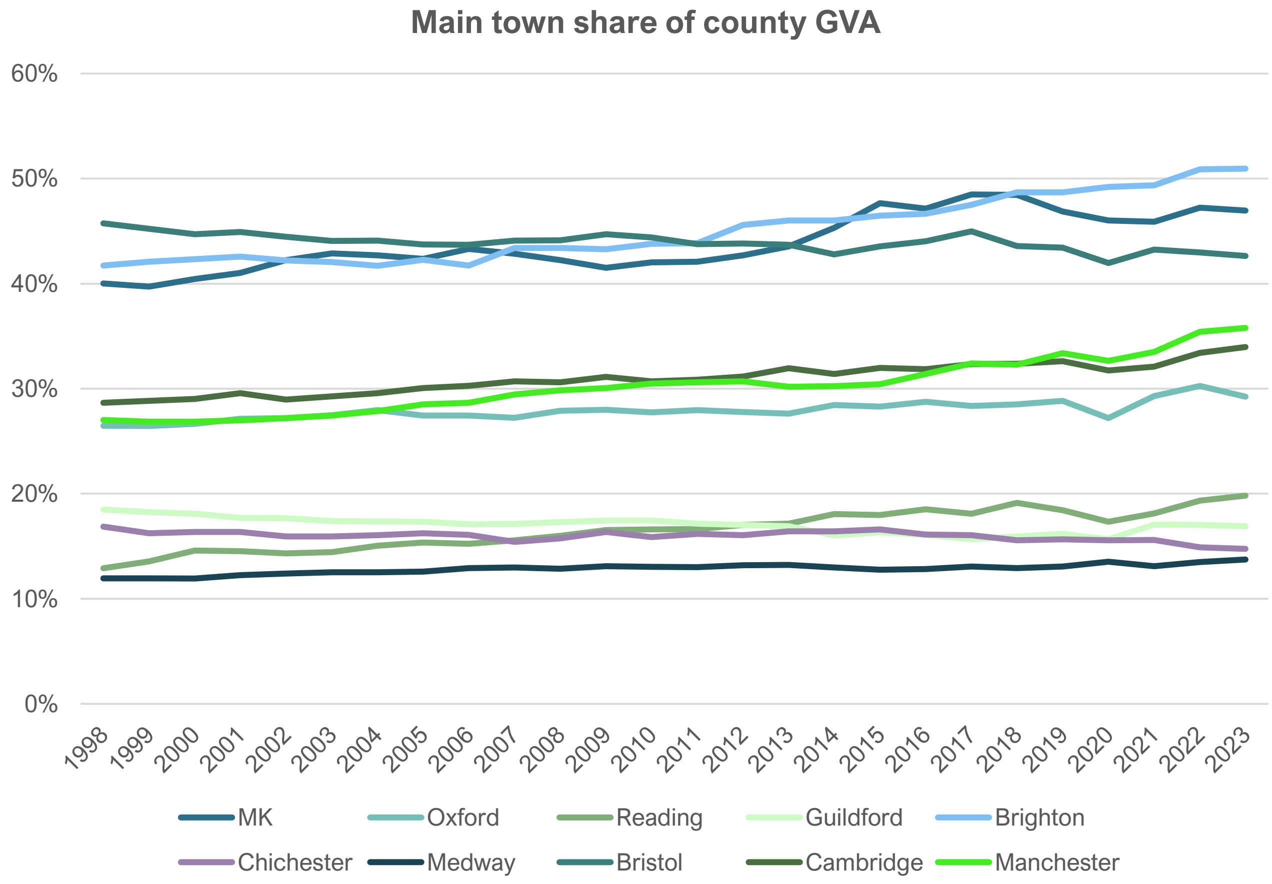
Source: BRES, 2023

Oxford anchors the county, within a more balanced economic geography

Oxford is Oxfordshire's primary economic engine, contributing around **30%** of county GVA – above the city's share of the county's population. However, this places the city **between** comparator patterns, rather than at either extreme.

Oxfordshire is **not as economically concentrated** around its main centre as places such as Milton Keynes or Brighton. Equally, it is **not as polycentric** as counties where the leading centre accounts for a smaller share of total output (e.g. Guildford or Chichester).

Oxfordshire's position is closest to Cambridge in headline share terms – with an important caveat therefore on boundary definitions.



Source: Sub-Regional GVA, ONS

When comparing Oxfordshire and Cambridgeshire further, there is divergence between the cities' trajectories

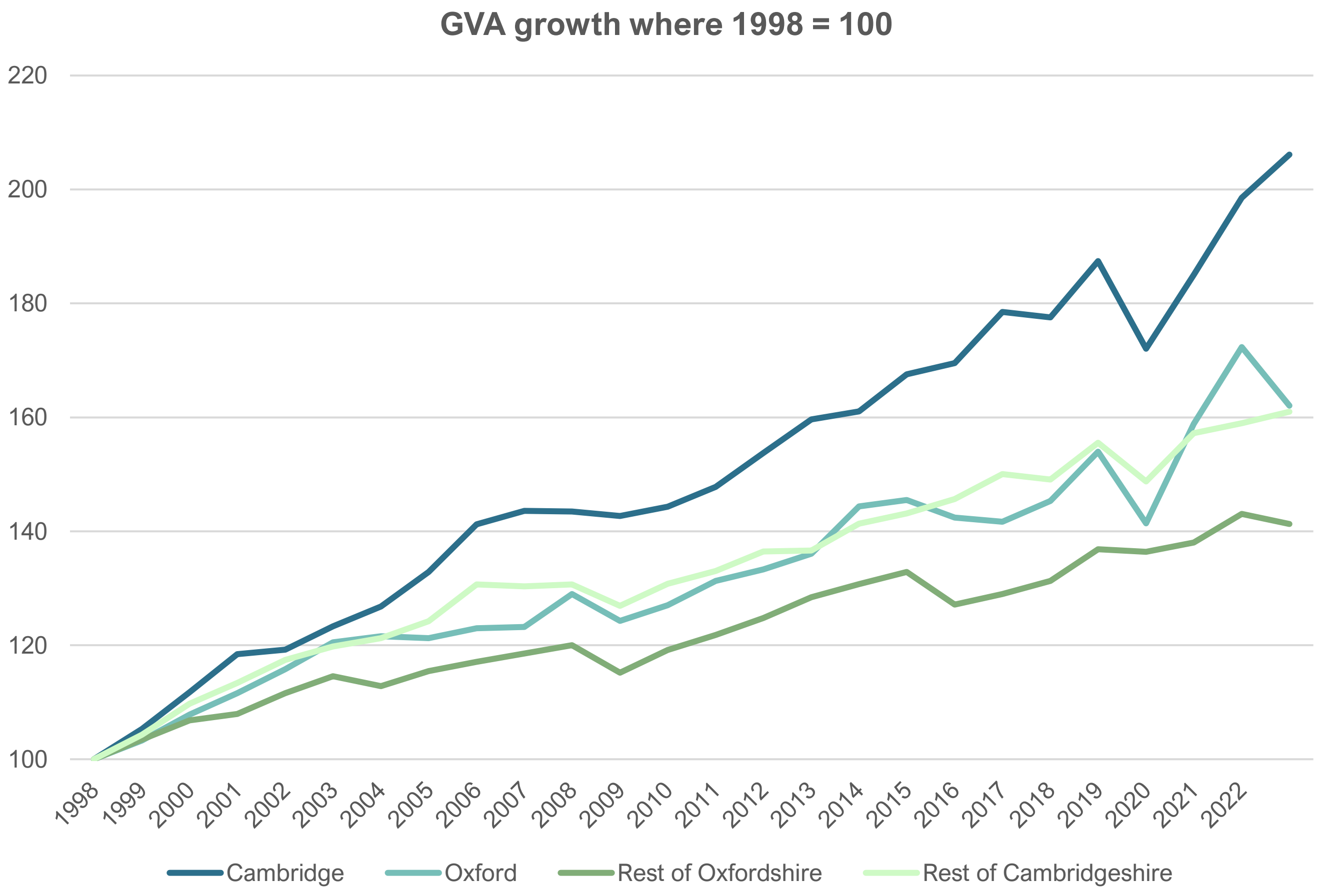
Page 72

Both counties have experienced substantial economic growth since 1998. However, Oxford and the rest of Oxfordshire have grown more slowly than their counterparts in Cambridgeshire.

In particular, there has been a divergence between the cities themselves, with Cambridge's growth rate accelerating significantly over time, while Oxford's has been more modest.

Notably, Oxford's trajectory now aligns more closely with the wider Cambridgeshire economy than with Cambridge city.

These comparisons come with the caveat that both cities have tight administrative boundaries, meaning the functional economic areas extend beyond what is shown in this chart.



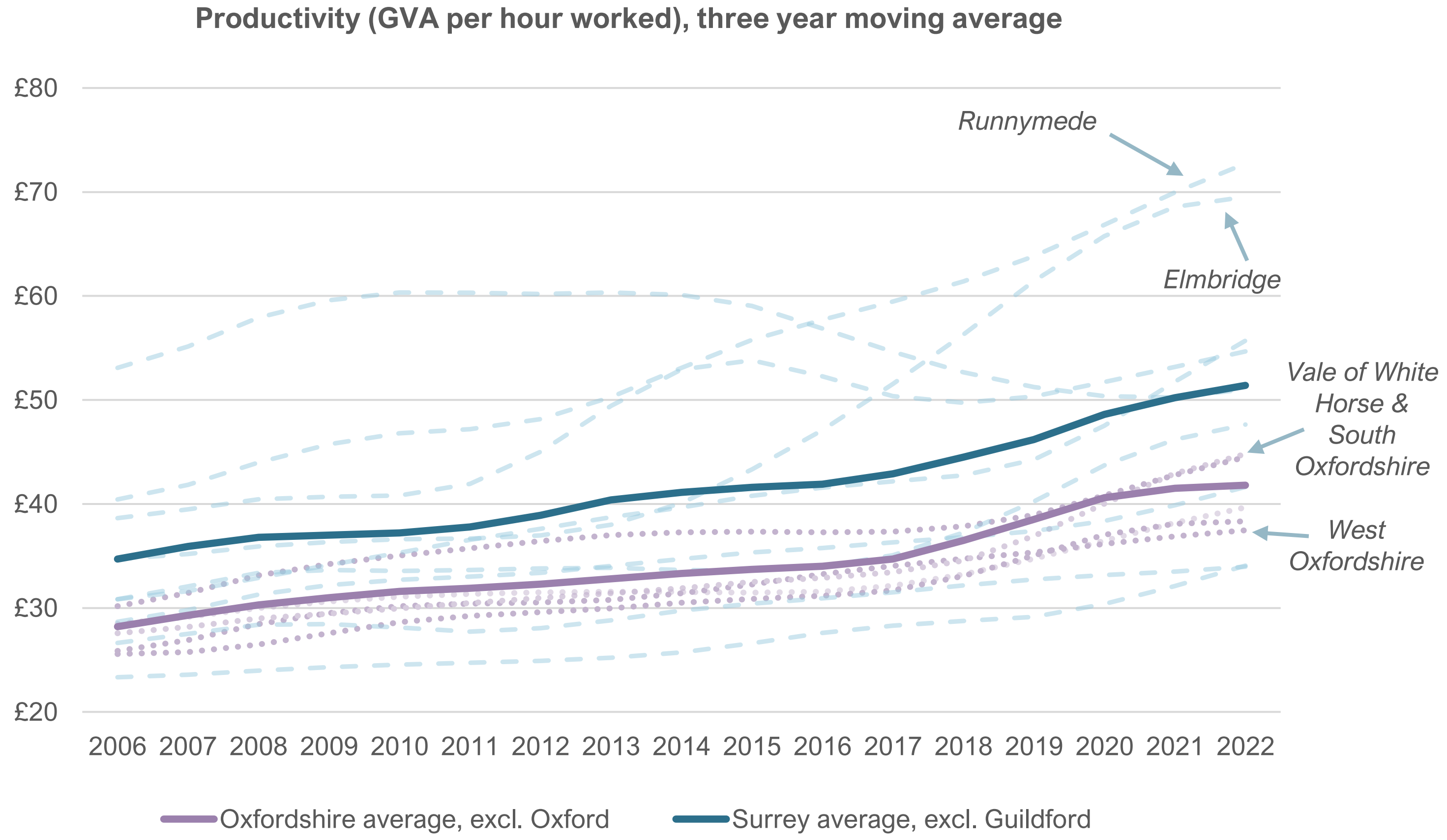
Source: Sub-Regional GVA, ONS

Beyond Greater Oxford, there is also untapped potential in market towns

Page 73

When comparing Surrey's market towns, they show a spreading of economic growth. Several Surrey districts – notably Runnymede and Elmbridge – record significantly higher productivity than seen in Oxfordshire, reflecting concentrations of corporate head offices, high-value business services, and strong connectivity to Heathrow and London.

Overall, there is more varied productivity performance than in Oxfordshire, where non-Oxford districts cluster within a narrower band, outperforming Surrey's weakest areas, but with a material gap on average.



Source: Sub-Regional GVA, ONS

District commuting shows several economic hubs

Census 2021 commuting data shows the different commuting patterns for the four non-Oxford districts (with pandemic related caveats). Most are fairly self contained.

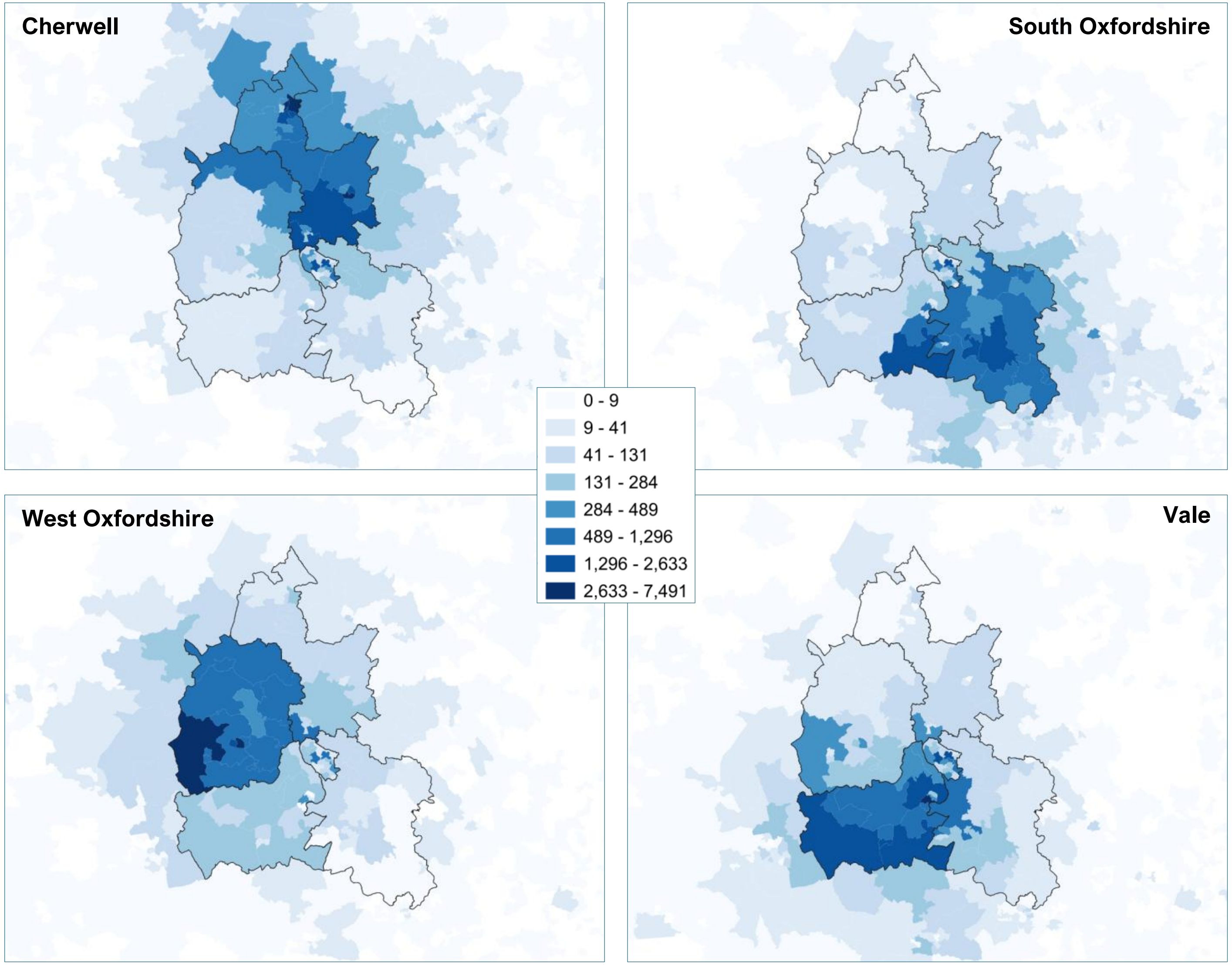
For Vale residents, the major commuting destinations are spread across the districts.

West Oxfordshire is evenly spread with the highest number travelling into Burford.

For South Oxfordshire, the MSOA that is the single highest destination for commuters is the area containing Harwell Campus.

Cherwell's major sites are Banbury, Bicester, and Bicester Village, with spillover into Buckinghamshire, for example.

Each has between 1,000 and 1,500 commuters to Headington – West and South Oxfordshire send half the number of commuters to Oxford city centre as the other two.

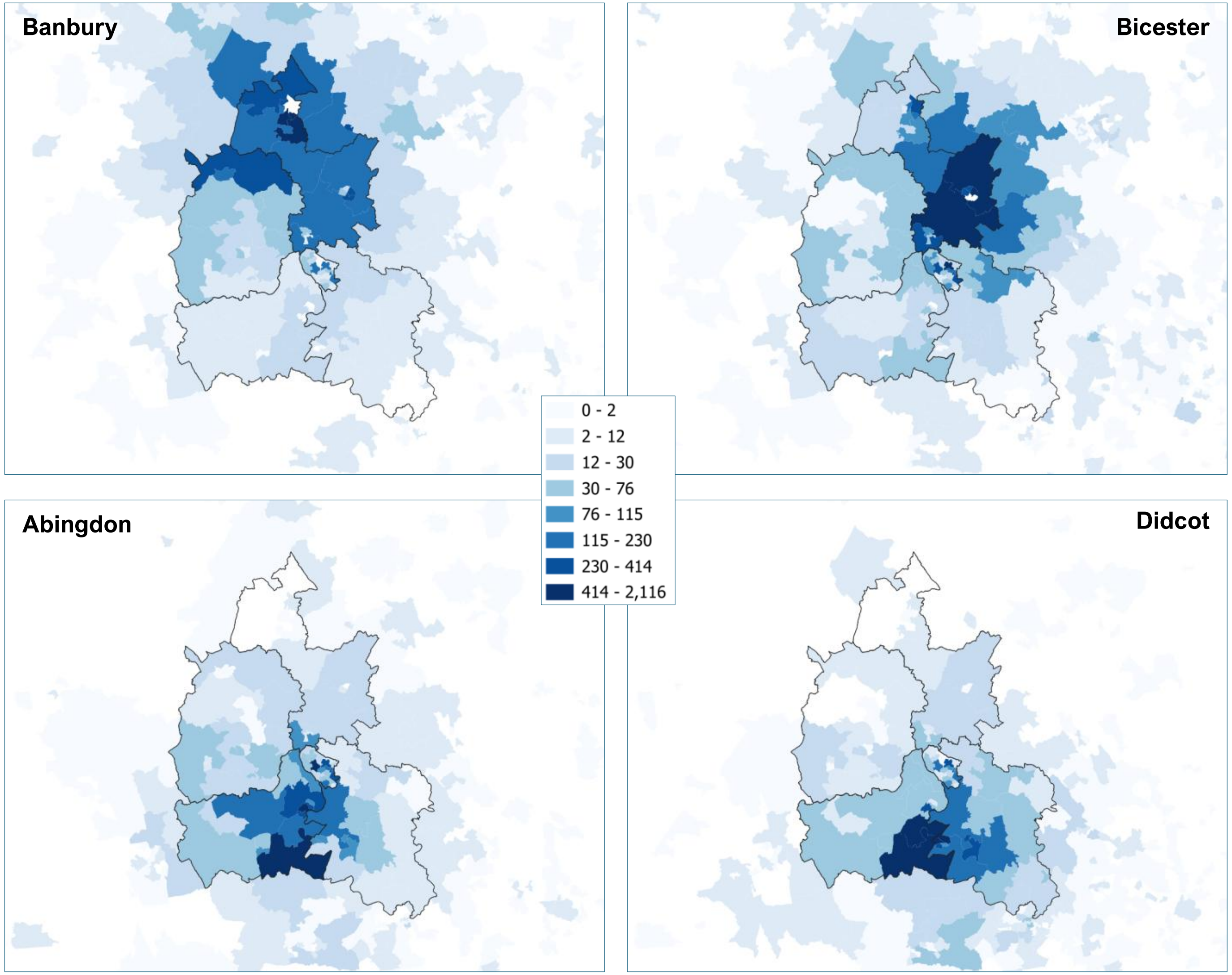


Market town commuting also shows this variation

These maps show the same data for the four largest non-Oxford towns.

Banbury's commuters are spread out across Cherwell, though largely self-contained within the district with moderate spillover outside of the county. Bicester shows strong commuting into the area containing Bicester Village, as well as links into Oxford city centre and some spillover outside of the country

Both Abingdon and Didcot have commuting flows that are concentrated in the employment land in and around the two towns, with similar levels of commuting into Oxford city centre as Bicester.



Sector growth in Oxfordshire towns and cities further highlights the different economic role each one could play

The following slides present the results of a spatial sector analysis focused on Oxfordshire's major urban settlements using custom MSOA definitions. The analysis focuses on employment in these areas, how their sectors compare to Oxfordshire and national concentrations using LQs, and their Compound Annual Growth Rate (CAGR) between 2019 and 2024.

Towns and cities in Oxfordshire have different mixes of business sectors. Each has a distinct mix, and none resembles Oxford, whose economy is dominated by education and health. The towns demonstrate broadly foundational-focused economies, with retail, logistics, agri-food, hospitality and local services playing a large role in shaping overall employment.

Presence of National Industrial Strategy sectors in towns is generally low in levels of employment. There are small but notable pockets – digital in Abingdon, and advanced manufacturing in Abingdon, Banbury and Bicester – but nothing comparable to Oxford's concentration in life sciences and research-intensive activities.

In Banbury and Bicester, transport and logistics is expanding quickly. Bicester also shows broader growth across several smaller sectors, including professional business services, whereas Banbury's sectors are larger but are showing challenging growth patterns. In Didcot, transport and logistics is again a major growth driver, while both Didcot and Abingdon otherwise show moderate or stable performance across their largest sectors. Abingdon has clearer potentially emerging strengths, while Didcot's profile is more mixed.

This analysis highlights the tailored approach required for each town, but also an opportunity develop sectors across towns, linked to wider growth opportunities.

Spatial sector analysis: Abingdon

Grounded in **foundational sectors**, notably retail and wholesale, which remain concentrated and have grown ahead of county and national trends. Clear **digital** strength (high LQ, steady growth), suggesting an established and successful specialism. **Advanced manufacturing** is growing but is below Oxfordshire's concentration, potentially indicating more room to grow. Similarly, **life sciences** activity is small, below the county average, but expanding rapidly.

Abingdon	Employment in 2024	Oxfordshire LQ	Great Britain LQ	Change in Employment 2019-24	CAGR	Oxfordshire CAGR	National CAGR
Health & Social Care	2,525	1.2	1.1	-37	-0.3%	1.6%	2.5%
Education	2,506	0.9	1.7	+419	3.7%	1.4%	0.8%
Retail & Wholesale	2,094	1.3	1.3	+130	1.3%	-1.7%	-1.6%
Digital	1,454	2.1	2.2	+113	1.6%	2.5%	1.3%
Agri-Food	1,165	1.1	0.9	-146	-2.3%	-1.5%	0.0%
Hospitality Services	1,040	0.8	0.7	+56	1.1%	-0.5%	0.8%
Other Services	1,011	0.9	0.9	+91	1.9%	-0.7%	0.8%
Construction	833	1.0	0.9	-151	-3.3%	-3.2%	1.1%
Advanced Manufacturing	742	0.8	1.3	+148	4.6%	0.9%	-0.7%
Public Administration	680	1.5	0.8	+213	7.8%	0.7%	3.1%
Creative & Cultural	417	0.6	0.8	+9	0.4%	1.0%	1.2%
Life Sciences & MedTech	394	0.5	3.0	+108	6.6%	7.1%	2.4%
Professional Business Services	390	0.6	0.7	+40	2.2%	1.3%	2.8%
Real Estate	390	1.2	1.1	+229	19.4%	3.4%	3.0%
Administrative Services	385	0.7	0.4	-290	-10.6%	-1.4%	-0.1%
Transport & logistics	378	0.6	0.5	+125	8.3%	3.1%	1.0%
Finance & Insurance	293	0.8	0.4	-10	-0.7%	3.1%	1.2%
Utilities	249	1.5	1.3	+75	7.4%	2.8%	1.3%
Manufacturing	213	0.6	0.4	-68	-5.4%	-2.7%	-2.0%
Legal Services	157	1.3	0.8	+54	8.9%	-0.7%	1.0%
Air & Aerospace	0	0.0	0.0	0	0.0%	3.4%	-0.1%

Spatial sector analysis: Didcot

Clear strength and specialism in **retail** and in **transport and logistics**, the latter linked to warehouse and distribution growth. **Agri-food** also shows a high concentration, though this may reflect MSOA boundaries, and the sector has shed substantial employment. Beyond these, the picture is mixed, with few strong specialisms and limited presence in IS8 sectors.

Didcot	Employment in 2024	Oxfordshire LQ	Great Britain LQ	Change in Employment 2019-24	CAGR	Oxfordshire CAGR	National CAGR
Retail & Wholesale	1,422	1.8	1.8	+231	3.6%	-1.7%	-1.6%
Transport & logistics	1,021	3.5	2.7	+569	17.7%	3.1%	1.0%
Education	890	0.7	1.2	+97	2.3%	1.4%	0.8%
Health & Social Care	885	0.8	0.7	+83	2.0%	1.6%	2.5%
Agri-Food	767	1.5	1.2	-897	-14.4%	-1.5%	0.0%
Hospitality Services	737	1.1	1.0	+64	1.8%	-0.5%	0.8%
Other Services	587	1.0	1.0	-72	-2.3%	-0.7%	0.8%
Construction	345	0.9	0.8	+5	0.3%	-3.2%	1.1%
Administrative Services	320	1.3	0.7	-890	-23.4%	-1.4%	-0.1%
Advanced Manufacturing	296	0.7	1.0	+94	7.9%	0.9%	-0.7%
Real Estate	291	1.8	1.6	+70	5.7%	3.4%	3.0%
Utilities	224	2.8	2.3	+119	16.3%	2.8%	1.3%
Manufacturing	162	0.9	0.6	+17	2.2%	-2.7%	-2.0%
Creative & Cultural	158	0.4	0.6	+17	2.2%	1.0%	1.2%
Digital	127	0.4	0.4	-17	-2.5%	2.5%	1.3%
Public Administration	110	0.5	0.3	-31	-4.9%	0.7%	3.1%
Professional Business Services	105	0.3	0.4	+10	1.9%	1.3%	2.8%
Finance & Insurance	96	0.6	0.2	+2	0.3%	3.1%	1.2%
Legal Services	47	0.8	0.5	+8	3.8%	-0.7%	1.0%
Life Sciences & MedTech	15	0.0	0.2	+15	New	7.1%	2.4%
Air & Aerospace	0	0.0	0.0	-10	-100.0%	3.4%	-0.1%

Spatial sector analysis: Banbury

Notable specialisms in 5 of 6 largest sectors – e.g., **retail**, **agri-food**, and **other services** – but of those only two have grown since 2019, with **transport and logistics** the fastest growing of the largest six. Town also lacks the strong **education** sector seen in the county overall. **Advanced manufacturing** is expanding moderately but remains below the wider Oxfordshire concentration, while **manufacturing** is shrinking despite a relatively high local concentration

Banbury	Employment in 2024	Oxfordshire LQ	Great Britain LQ	Change in Employment 2019-24	CAGR	Oxfordshire CAGR	National CAGR
Retail & Wholesale	4,897	1.6	1.6	-29	-0.1%	-1.7%	-1.6%
Agri-Food	4,348	2.2	1.8	-271	-1.2%	-1.5%	0.0%
Other Services	3,944	1.8	1.8	-1,719	-7.0%	-0.7%	0.8%
Health & Social Care	3,733	0.9	0.8	+315	1.8%	1.6%	2.5%
Transport & logistics	2,252	2.0	1.5	+900	10.7%	3.1%	1.0%
Administrative Services	1,957	2.0	1.2	-299	-2.8%	-1.4%	-0.1%
Education	1,956	0.4	0.7	-191	-1.8%	1.4%	0.8%
Hospitality Services	1,877	0.8	0.7	+195	2.2%	-0.5%	0.8%
Advanced Manufacturing	1,845	1.1	1.7	+157	1.8%	0.9%	-0.7%
Manufacturing	1,222	1.8	1.2	-410	-5.6%	-2.7%	-2.0%
Construction	1,137	0.7	0.7	+82	1.5%	-3.2%	1.1%
Digital	880	0.7	0.7	+174	4.5%	2.5%	1.3%
Finance & Insurance	581	0.9	0.4	+34	1.2%	3.1%	1.2%
Professional Business Services	520	0.4	0.5	+25	1.0%	1.3%	2.8%
Public Administration	490	0.6	0.3	-16	-0.6%	0.7%	3.1%
Creative & Cultural	437	0.3	0.5	-132	-5.1%	1.0%	1.2%
Real Estate	405	0.7	0.6	+113	6.8%	3.4%	3.0%
Legal Services	251	1.1	0.7	-119	-7.5%	-0.7%	1.0%
Utilities	150	0.5	0.4	+53	9.2%	2.8%	1.3%
Air & Aerospace	130	0.9	0.5	+130	New	3.4%	-0.1%
Life Sciences & MedTech	56	0.0	0.2	+22	10.7%	7.1%	2.4%

Spatial sector analysis: Bicester

Notable concentrations across several of its top ten sectors, with particularly strong growth in **transport and logistics**, **professional business services** and **advanced manufacturing.** The wider mix shows stability, with only limited decline outside retail and wholesale – although that contraction is significant given it is Bicester's largest sector and reflects wider county and national trends.

Bicester	Employment in 2024	Oxfordshire LQ	Great Britain LQ	Change in Employment 2019-24	CAGR	Oxfordshire CAGR	National CAGR
Retail & Wholesale	4,688	2.2	2.2	-739	-2.9%	-1.7%	-1.6%
Agri-Food	2,766	1.9	1.6	+27	0.2%	-1.5%	0.0%
Hospitality Services	2,145	1.2	1.0	+47	0.4%	-0.5%	0.8%
Health & Social Care	2,142	0.7	0.6	+106	1.0%	1.6%	2.5%
Transport & logistics	1,588	1.9	1.5	+1,032	23.3%	3.1%	1.0%
Other Services	1,294	0.8	0.8	+171	2.9%	-0.7%	0.8%
Professional Business Services	1,286	1.5	1.7	+922	28.7%	1.3%	2.8%
Education	1,281	0.3	0.6	+139	2.3%	1.4%	0.8%
Advanced Manufacturing	1,244	1.0	1.5	+360	7.1%	0.9%	-0.7%
Administrative Services	1,211	1.7	1.0	-150	-2.3%	-1.4%	-0.1%
Digital	880	0.9	1.0	+323	9.6%	2.5%	1.3%
Real Estate	864	1.9	1.7	+156	4.1%	3.4%	3.0%
Construction	822	0.7	0.7	+93	2.4%	-3.2%	1.1%
Manufacturing	548	1.1	0.7	-40	-1.4%	-2.7%	-2.0%
Finance & Insurance	404	0.8	0.3	+121	7.4%	3.1%	1.2%
Public Administration	375	0.6	0.3	+30	1.7%	0.7%	3.1%
Creative & Cultural	275	0.3	0.4	+88	8.0%	1.0%	1.2%
Utilities	214	0.9	0.8	+100	13.3%	2.8%	1.3%
Life Sciences & MedTech	131	0.1	0.7	-40	-5.2%	7.1%	2.4%
Legal Services	89	0.5	0.3	+26	7.0%	-0.7%	1.0%
Air & Aerospace	5	0.0	0.0	+0	0.0%	3.4%	-0.1%

Spatial sector analysis: Oxford

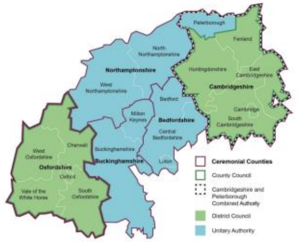
Health and **education** are the leading sectors, together accounting for roughly as much employment as all other sectors combined. Outside these two anchors, there has been broad contraction, including in **professional business services** and **advanced manufacturing**, though **digital** and **life sciences** have expanded strongly. This contraction points to a potential narrowing of Oxford's economic base, with growth concentrated in a small number of knowledge-intensive businesses.

Page 81

Oxford	Employment in 2024	Oxfordshire LQ	Great Britain LQ	Change in Employment 2019-24	CAGR	Oxfordshire CAGR	National CAGR
Education	39,337	2.0	3.8	+2,828	1.5%	1.4%	0.8%
Health & Social Care	25,240	1.6	1.4	+2,670	2.3%	1.6%	2.5%
Hospitality Services	8,626	0.9	0.8	-673	-1.5%	-0.5%	0.8%
Retail & Wholesale	6,150	0.5	0.5	-2,684	-7.0%	-1.7%	-1.6%
Creative & Cultural	5,623	1.1	1.5	-550	-1.8%	1.0%	1.2%
Other Services	4,495	0.5	0.5	-604	-2.5%	-0.7%	0.8%
Digital	4,358	0.9	0.9	+956	5.1%	2.5%	1.3%
Agri-Food	4,189	0.6	0.5	-430	-1.9%	-1.5%	0.0%
Professional Business Services	3,823	0.9	1.0	-1,394	-6.0%	1.3%	2.8%
Advanced Manufacturing	3,811	0.6	0.9	-2,707	-10.2%	0.9%	-0.7%
Life Sciences & MedTech	3,676	0.7	3.8	+1,185	8.1%	7.1%	2.4%
Administrative Services	3,453	0.9	0.5	+957	6.7%	-1.4%	-0.1%
Public Administration	3,317	1.0	0.6	+105	0.6%	0.7%	3.1%
Transport & logistics	2,604	0.6	0.5	-1,203	-7.3%	3.1%	1.0%
Construction	2,208	0.4	0.3	-4,696	-20.4%	-3.2%	1.1%
Finance & Insurance	1,636	0.6	0.3	+85	1.1%	3.1%	1.2%
Real Estate	1,605	0.7	0.6	+193	2.6%	3.4%	3.0%
Legal Services	835	1.0	0.6	-113	-2.5%	-0.7%	1.0%
Manufacturing	502	0.2	0.1	-296	-8.9%	-2.7%	-2.0%
Utilities	314	0.3	0.2	-250	-11.1%	2.8%	1.3%
Air & Aerospace	5	0.0	0.0	+0	0.0%	3.4%	-0.1%

Findings from Phase 1: Delivery

There is a lot of economic development activity, focused in and across Oxfordshire at different overlapping geographies with different agendas

Ox-cam corridor  Figure 1.1 – The Oxford-Cambridge Arc	**Theory of growth:** Agglomeration of high-value sectors (life sciences, AI, advanced manufacturing) in a connected geography reduces transaction costs, fosters knowledge spillovers, and attracts investment. Aligning infrastructure investment with sectoral clusters to maximise positive spillovers and productivity gains, linking innovation hubs with intermediate nodes to create a supercluster that competes globally, reducing congestion costs and enabling labour mobility to support higher GVA growth. **Government-led ED capacity and approach:** Predominantly in housing, transport and infrastructure Cambridge Growth Commission, HMG Dev Co, £400m to deliver affordable homes, infrastructure, and business expansion. Oxford Growth Commission, reopening of the Cowley Branch railway line Reinforcement of the East West Rail project, potentially two new water reservoirs, oxcam investment prospectus
Thames valley devolution area 	**Theory of growth:** Pan-regional agglomeration connecting currently separate labour markets and knowledge economies to drive additional growth to counteract stagnation elsewhere in the region. **MSA ED capacity and approach:** Standard level 3 powers around housing, transport, skills, spatial planning, investment Could focus precisely on developing new cross-sector investment propositions, using investment and planning, and enabling labour market connectivity and alleviating constraints on growth through housing, transport, skills interventions. SDS 30 year plan. MSA powers could also be focused on supporting non-pan regional growth opportunities at the Oxfordshire level
Oxfordshire 	**Theory of growth:** one of the outcomes of this project. A precise spatial and sectoral theory of the different components of Oxfordshire will grow and what is needed to unlock this, potentially including: • Growing Oxford • Banbury & Bicester • Science Vale • West Oxfordshire **Emerging approach:** Establishing shared priorities and projects around components of the economy where public sector intervention or convening is needed to support growth. Economy-led rather than organisation-led, to withstand structural change **Potential capacity:** inward investment network with Equinox, sector and cluster development, town regeneration commercial and housing, transport investment, skills pathways into mid-level technical jobs

Current economic priorities are broad, and reflective of a historic approach that has struggled to galvanise collective action

OxLEP's Strategic Economic Plan	**Enable businesses** to thrive and encourage pervasive innovation	**Widen access** to current opportunities and equip people and places as jobs change over the next decade	**Secure resilient infrastructure** for planned growth, consistent with Oxfordshire's commitment to net zero carbon by 2050	**Ensure Oxfordshire's places** are sustainable and inclusive, and that local communities flourish.	
Oxfordshire Infrastructure Strategy	**Environment** Build resilience, restore biodiversity, support zero-carbon ambitions.	**Placeshaping** Create sustainable, vibrant communities with quality housing and growth.	**Health** Improve wellbeing, reduce inequalities, create inclusive communities.	**Productivity** Harness business innovation, reduce skills gaps, promote inclusive economy.	**Connectivity** Expand digital access, enable transport links, support innovative technologies.
Local Skills Improvement Plan	**Partnership** Bringing employers and training providers together	**Inclusive** Making sure training is accessible to all	**Aspiration** Promoting exciting careers opportunities in key sectors	**Careers** Long-term careers, not short-term jobs	
OxRail 2040: Plan for Rail	**Improving connectivity and enhancing infrastructure** Defining the changes required	**Climate action** Setting out how climate mitigation and adaptation in rail	**Rail as a placeshaper** The role of stations and rail in shaping inclusive and connected communities		

- Inclusivity and placemaking
- Connectivity and infrastructure
- Climate and sustainability
- Innovation and business growth

Metro——Dynamics

Different constraints and opportunities to address in different places, and an opportunity to make the whole greater than the sum of its parts

Area	Economic characteristics		Economic development approach		
	Strengths and opportunities	**Challenges and constraints**	**Priority actions**	**Outcomes targeted**	**Strategy and delivery Qs**
Oxfordshire	• Diverse sector strengths and multiple growth points	• Overall productivity stagnant and lagging behind neighbours • Combined with housing costs means lower GDHI than neighbours	• County wide skills support delivery, infrastructure and transport investment	• Above national average productivity and output growth	• What does good growth look like for each area? What are we trying to achieve? • What are the key opportunities to focus on to get there? • What does a networked and integrated county wide and area-based approach look like? • What makes sense to mobilise early to make an impact?
Greater Oxford	• Productivity growth higher than rest of County and UK • Global innovation and research assets	• Residential growth needed to meet growth needs • Physically constrained and small housing sites	• Integrated housing and infrastructure delivery • Coordinated inward investment	• Above County average productivity and output growth • Increased scale up	
Major connected towns – Banbury and Bicester	• Large planned / committed housing sites • Strong road and rail connections out of County • Strong employment and growth in advanced manufacturing, logistics	• Resi capacity w/o planned sites • Shrinking high employing sectors – manufacturing, retail and wholesale, agrifood, other services • Limited connectivity in County • Matching local mid level skills	• Support to sector and growth projects, across Oxfordshire boundaries • Housing and employment site delivery	• Growth in sectors maximising regional / national connectivity	
Abingdon-Didcot-Harwell-science parks corridor (Science Vale +)	• Science and innovation assets, growth businesses • Potential residential land capacity underused connecting corridor	• Constrained housing supply and infrastructure for growing labour market • Gap in innovation infusion into business base • Lack of space for scaleups • Matching local mid level skills	• Coordinated inward investment and promotion • Integrated infrastructure and housing delivery	• Growing investment in science parks • More new businesses, scaleups and innovation diffusion increasing growth	
West Oxfordshire	• High quality of life • High visitor economy employment • Planned housing growth	• Housing affordability and under-delivery • High car dependency • Limited spillover into higher-value sectors	• Unlock housing as an economic enabler • Support productivity improvements in visitor and foundational sectors • Skills and transport interventions	• Sustained high productivity • Stronger integration with county innovation economy • Diversified economic activity	

Findings from Phase 1: Overall strengths, weaknesses, opportunities and threats

Strengths

From engagement and analysis, we can see a significant set of economic strengths and some good delivery foundations from which Oxfordshire can build a new economic development approach.

Economy

- World class high value innovation and research assets and capabilities with interventional investor interest, global spillovers, University spinouts and startups, and globally significant firms across emerging technologies.
- High quality of life and levels of employment and skills.
- Diverse sector strengths across the economy, including growth in the Industrial Strategy 8 sectors, for example:
  - Oxford - concentration of education and research, health and manufacturing activity with assets in the Universities, the John Radcliffe, and manufacturing at the MINI plant
  - Vale of White Horse and South Oxfordshire - professional and technical industries, clean energy, strength of science and innovation assets at Harwell, Milton Park, Culham and Howbery
  - Cherwell – strong retail activity centred on Bicester Village alongside a notable manufacturing presence
- High value economic output from Oxford – accounting for 29.3% of the County's GVA output.
- Productivity in Oxford City growing faster than the rest of the County and national average at 18.1% since 2019.

Delivery

- Well recognised 'brand' of Oxford and Oxfordshire with University, Councils and partners having national and global reach.
- Active University and private sector partnerships in innovative and high-tech areas of the economy.
- Strong civic participation and social capital – particularly in South Oxfordshire, the Vale of the White Horse, and Oxford – high levels of volunteering, local engagement, and social trust.
- VCSE organisations strong delivery partners in community services.

Weaknesses

The county's economy is not short of economic risks and constraints to address, and the delivery environment has and continues to be complex, dynamic and challenging.

Economy

- County wide productivity challenge – Oxfordshire overall productivity hasn't outpaced national averages, lags behind neighbours including Berkshire and Swindon, and has remained relatively stagnant over the past 20 years.
- Oxford is too small and growth is too slow to alone drive higher County growth.
- Recent decline in GVA in some sectors – notably advanced manufacturing in South Oxfordshire.
- Oxfordshire's gross disposable household income is lower than neighbouring Berkshire and Buckinghamshire.
- Market towns are not performing economically as strongly as they could be given the demographics of residents.
- Public transport reach is limiting labour market mobility, particularly for towns such as Witney and Banbury.
- Despite high employment, structural barriers keep people from the right jobs – knowledge gap.
- Lack of space and support for scaleups.
- Gap in innovation diffusion in the business base.

Delivery

- Diverging views on growth across the County limiting public sector attention and action.
- Existing economic strategies are broad in focus with some perceived complacency around Oxfordshire's strengths and need to grow.
- Lower levels of government economic development funding available than in the past.
- Existing business support disjointed – not integrated into Enterprise Oxfordshire, and perceived as generic – not geared towards Oxfordshire's sector specialisms, strengths and assets.
- Limited capacity in Oxfordshire economic development teams around strategy, account management, inward investment and investor relations, business environment and skills, compared with strengths in spatial planning.
- Gap in deep understanding and strategy around labour markets and skills connected to growth strategy.
- Economic development system lacks depth of data on local firms and the labour market.
- Enterprise Oxfordshire seen as the Council's body, rather than in partnership with business and Universities.
- Varying economic development capacity across District Councils.

Opportunities

There are unrivalled global economic opportunities, growth projects and investment prospects focused on Oxfordshire, Oxford, its science and business parks and the wider Thames Valley and OxCam corridor, as well as an active Government and private delivery landscape.

Economy

- Global investment opportunities in innovative firms.
- Growth potential in emerging technologies and sectors with existing assets that hasn't yet been realised across the County – including:
    - Battery supply chain
    - Engineering biology
    - Quantum tech
    - Biopharma
    - Omics
    - Telecomms supply chain
- Polycentric economy offering multiple opportunities for growth across labour markets.
- High levels of professional and knowledge workers are now working remotely for part or much of their week, increasing opportunities for higher daytime and midweek spending in market towns and rural areas.
- Potential opportunities to curate towns - e.g. Banbury development capacity for housing and economic activity, projects linking growth areas to towns – e.g. shuttle connections from business parks and new active travel infrastructure like the proposed bridge at Culham connecting homes, jobs, and the town centre.

System

- Dynamic institutional environment and opportunity to reshape economic development with local government reform.
- Thames Valley devolution – new powers, funding and collaboration – including on inward investment, skills and growth.
- Government backed initiatives for accelerating growth opportunities including:
    - OxCam Growth Corridor
    - Corridor into the West Midlands
    - Developing assets – Culham AI Growth Zone, EZs
- Opportunity to develop a compelling sector focused Local Growth Plan to galvanise public and private partners and investors across the County.
- Opportunity to develop Enterprise Oxfordshire with business and University partnerships and sector expertise, providing an integrated service across:
    - Inward investment and investor relations
    - Business support that targets the whole business lifecycle – startup, scaleup, internationalisation, exit
    - Employment and training system developing apprenticeships, school leaver routes, and long-term skilled jobs, linking to employment sites and investment.

Threats

Oxfordshire's knowledge economy faces global competition and communities are at risk of not fully benefitting from the growth that will come. Delivery systems face challenges with cuts to local growth funding in the interim period ahead of a strategic authority being established.

Economy

- Risk of trend in declining productivity continuing across Oxfordshire, against modest national growth – threatening future increases in incomes and quality of life against high cost of living and housing.
- A headline reading of overall output risks missing the support needed for IS8, innovative and high value growth sectors – e.g. Oxford's strongest recent GVA growth has come from from real estate and administration sectors.
- Constraints to future growth across the County include public transport connectivity and a sufficient and affordable housing offer.
- Without the right strategy, the polycentric nature of the County could hold back growth as the economy is missing the agglomeration effects of a large central city, an integrated labour market, and evenly spread GVA output and productivity.
- Need to support more inclusive innovation and the foundational economy to prevent deepening inequalities through a focus on high value growth and inward investment.

System

- Geographic focus of future economic development funding may be focused away from the South East and more place-based funding allocations based on deprivation levels.
- Risk that low intervention between public and private sector partners in economic development will prevent Oxfordshire from reaching its potential – including specifically:
  - Risk that underdeveloped sector expertise in the system constrains support for business growth and connecting to developing sector skills and expertise locally.
  - EZs and economic centres risk delaying / missing out on growth and revenue generation without quicker process for populating firm occupation on sites.

At Metro Dynamics, we **care** about places, our clients, and our colleagues.

We are an **independent** organisation, **curious** about our work, and **collaborative** in our approach. We strive to **make a difference** in all that we do.

3 Waterhouse Square
138 Holborn
London
EC1N 2SW

020 3865 3082

1 St Peter's Square
Manchester
M2 3DE

0161 8833736

This page is intentionally left blank

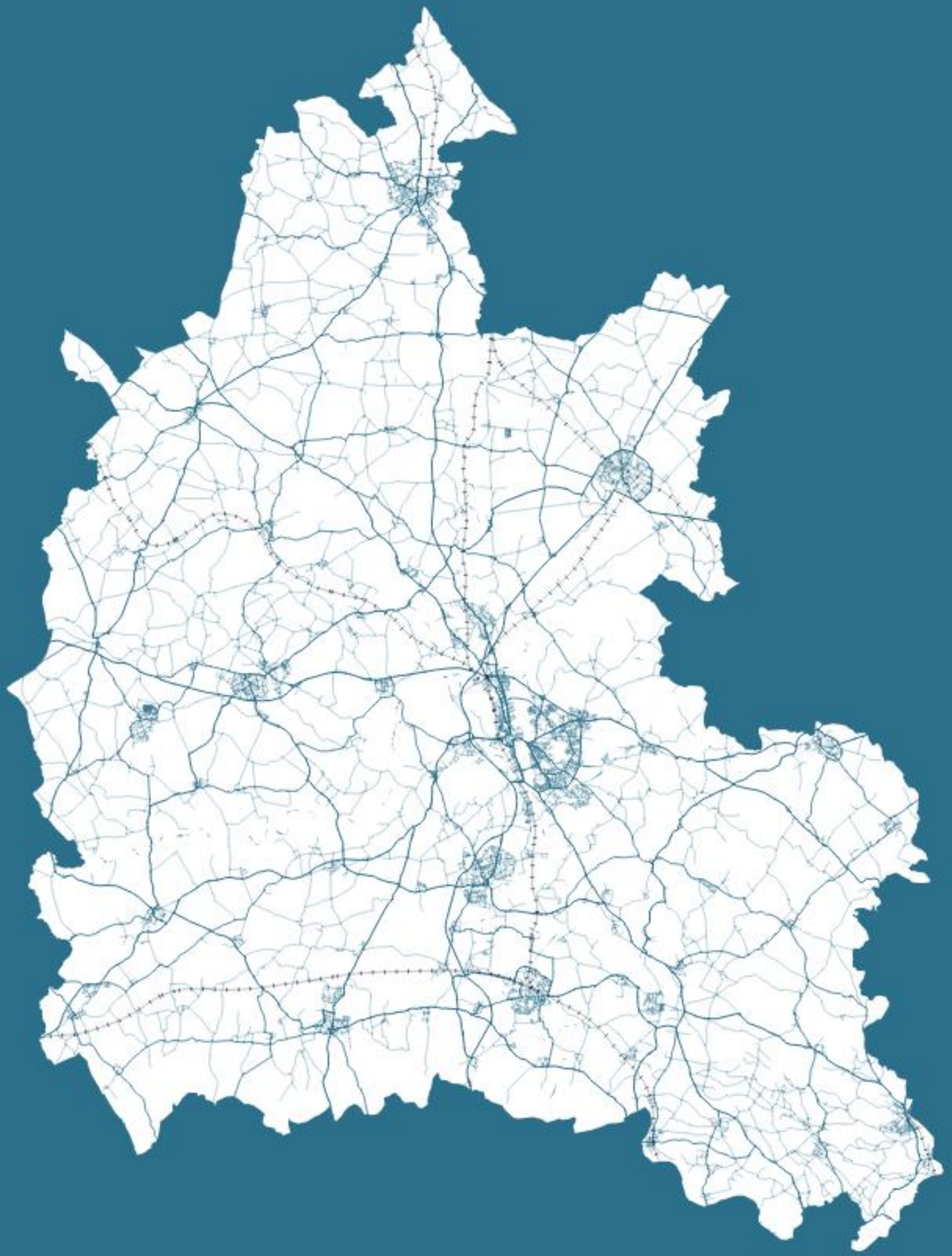
Metro——Dynamics

Future Oxfordshire Strategy

Phase 2A Report

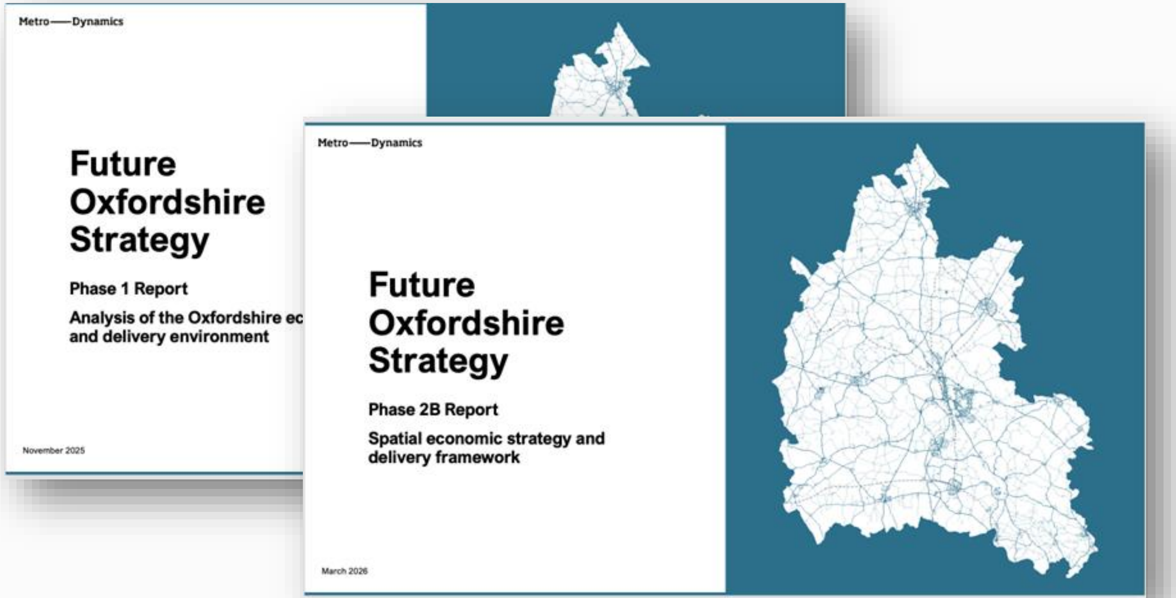
Analysis and priorities to address County-wide constraints

February 2026



Introduction to this report

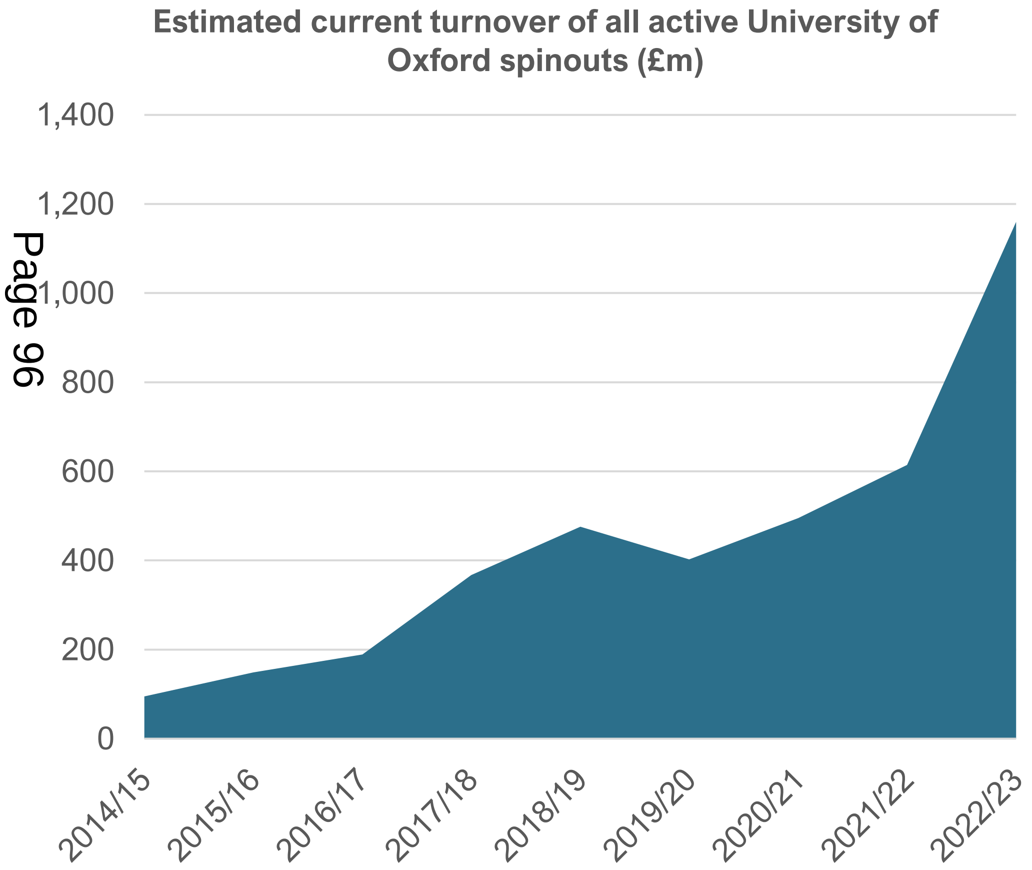
This report is the second output of the Future Oxfordshire Strategy project; the purpose of this report is to demonstrate the constraints impacting economic development and to outline key priorities to focus on in the now, next and future.



It sits alongside two other reports from this project. Phase 1, which assessed the structure, composition, performance and delivery environment of the Oxfordshire economy, to scope what is needed from a Future Oxfordshire Economic Strategy, and Phase 2B, which set out a spatial view of strategic economic priorities and a framework for how partners in the local government system and wider stakeholders can work together to deliver economic development to address these priorities

Sectors and investment

Oxfordshire's innovation economy works but is concentrated



Oxfordshire's innovation economy has expanded rapidly over the past decade, driven by both university-linked spinouts and science-based firms.

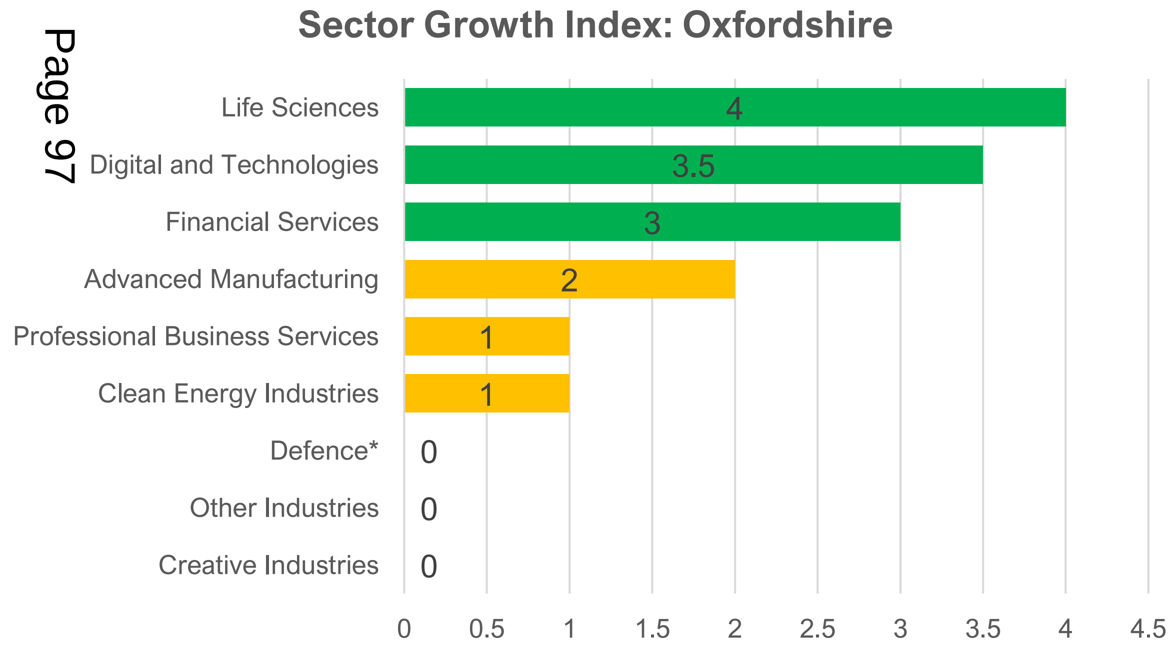
Not limited to the University of Oxford, Oxford Brookes University has also seen strong success in this area, with the combined turnover of its active spinouts increasing by 438% since 2014/15.

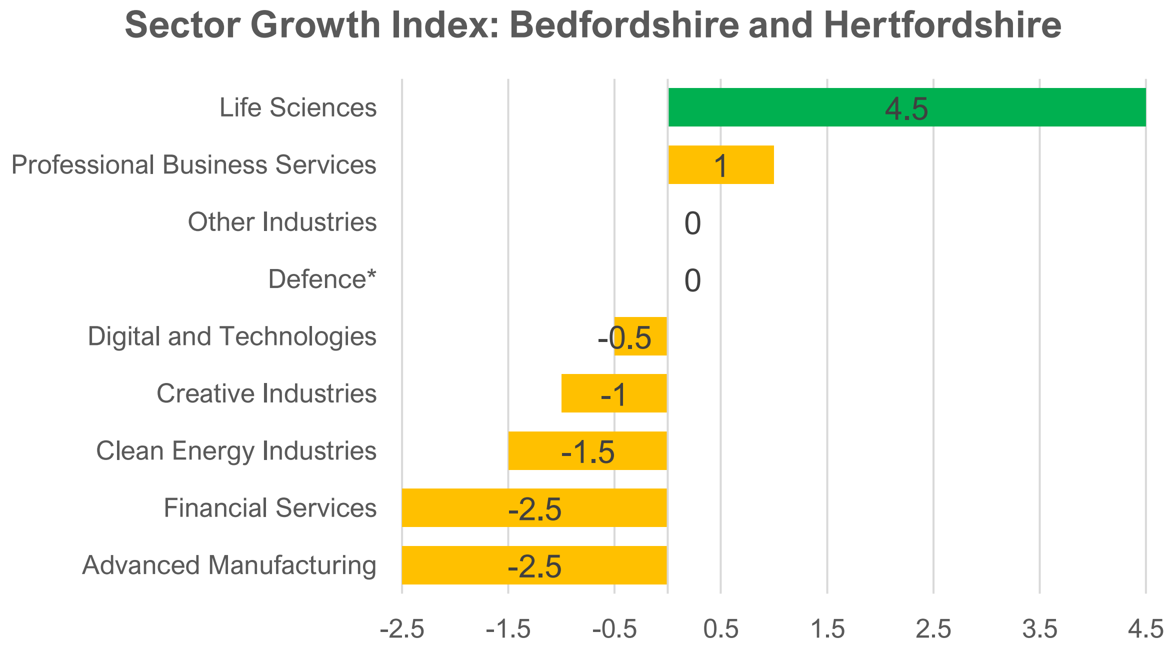
Expansion in innovative and knowledge-intensive activity has translated into substantial demand for high-quality employment and lab space. Major developments at Oxford North and the Oxford Science Park are being driven by this.

Source: HESA

Innovation strength is translating into sector growth

The Metro Dynamics Sector Growth Index aggregates five-year changes to economic data to provide a headline view of what is happening in a place's sectors. The maximum possible score is 7, which means a sector has seen growth across all measures and at a significantly faster rate than Great Britain. Using the government's IS-8 typology, Oxfordshire is in a very strong position, with scores of 3 or above indicating growth across multiple measures rather than a single data point. By contrast, the nearby economy of Bedfordshire and Hertfordshire presents a more uneven picture.



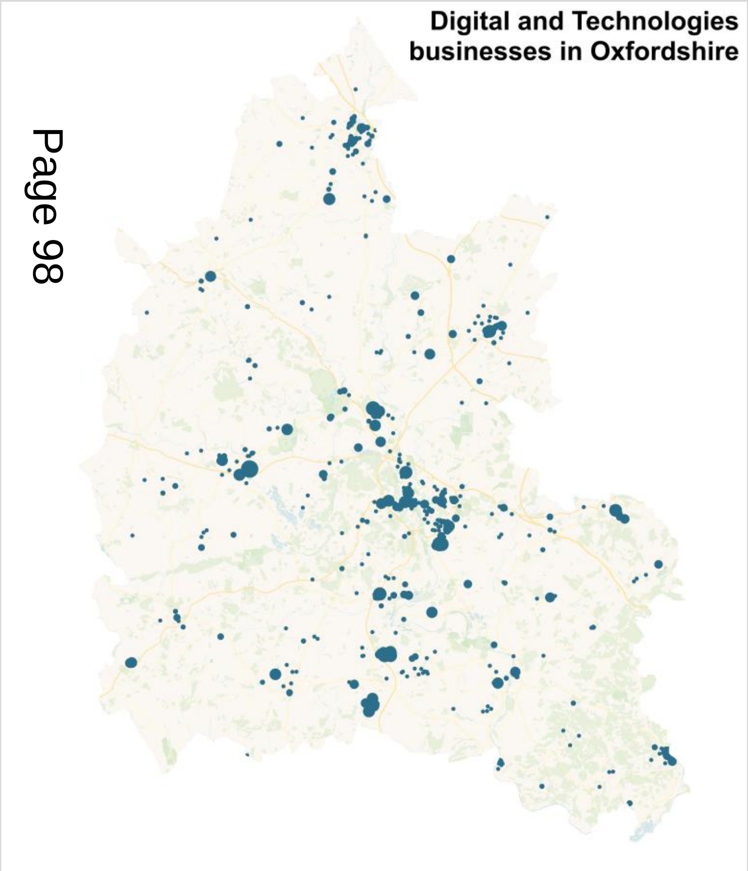


Source: Metro Dynamics analysis

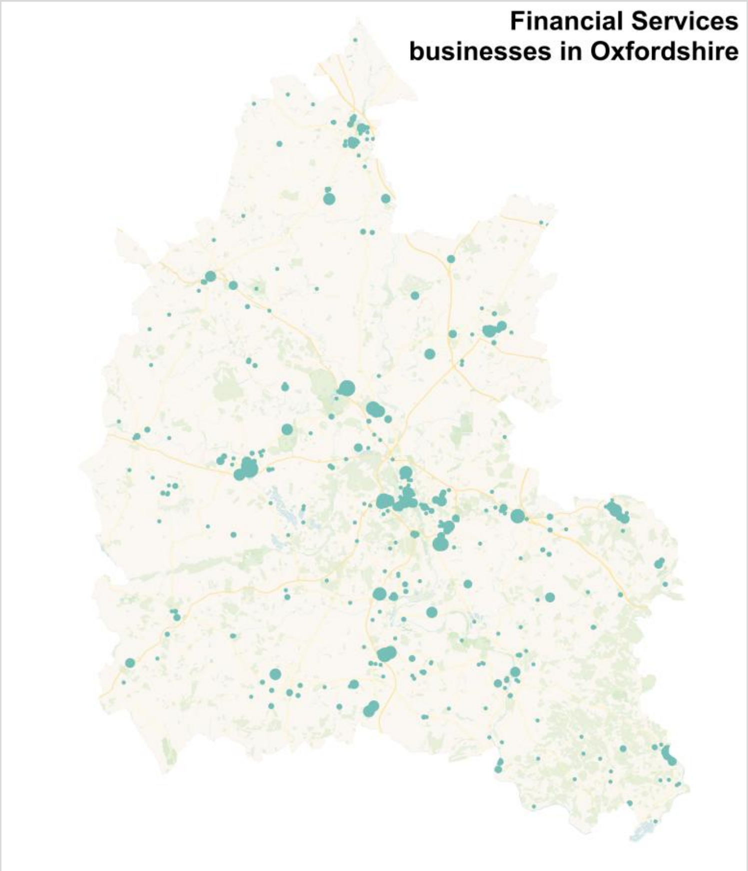
** The official definition for the defence sector is narrowly focused on production of solely military goods*

Mapping high growth potential sectors

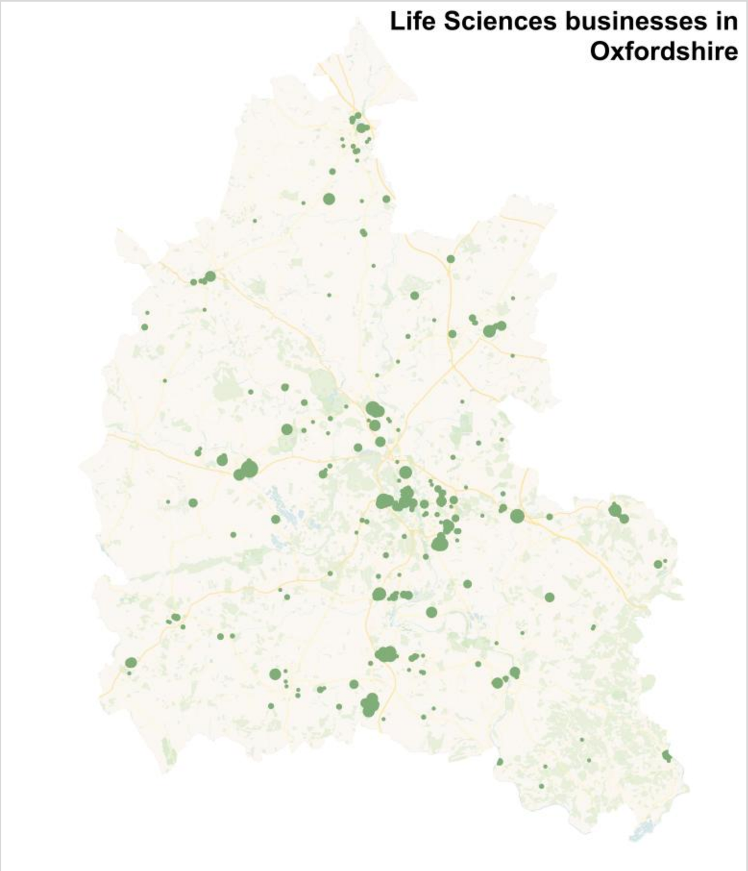
The fastest-growing sectors are distributed across Oxfordshire rather than concentrated in a single location. There is a strong and recurring presence around the county's science parks and innovation campuses, with multiple coterminous clusters.



Digital and Technologies businesses in Oxfordshire



Financial Services businesses in Oxfordshire



Life Sciences businesses in Oxfordshire

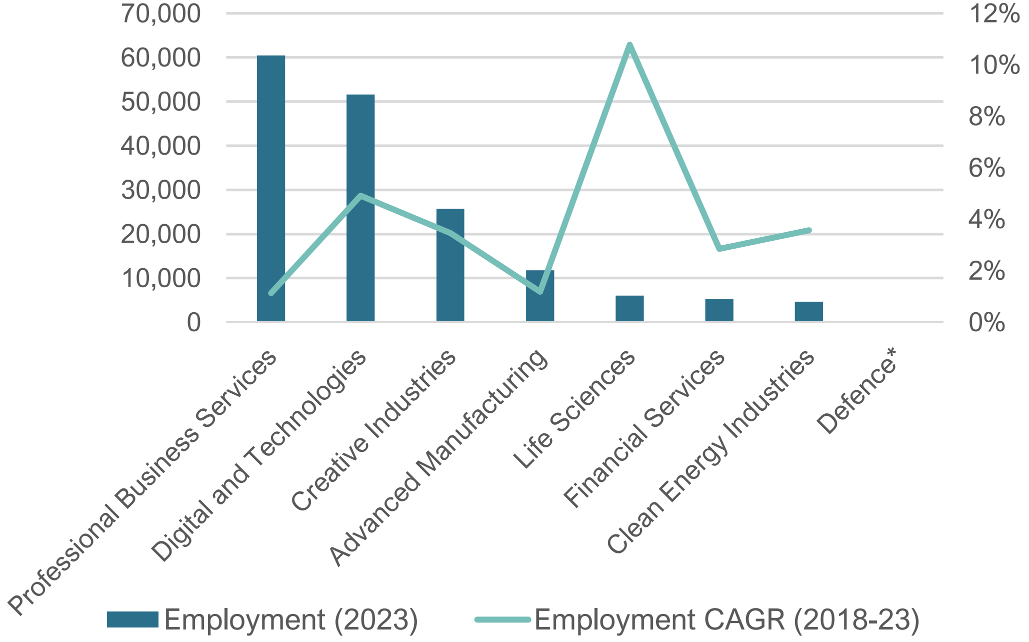
Source: The Data City (2025)

This growth is reshaping Oxfordshire's sectoral mix

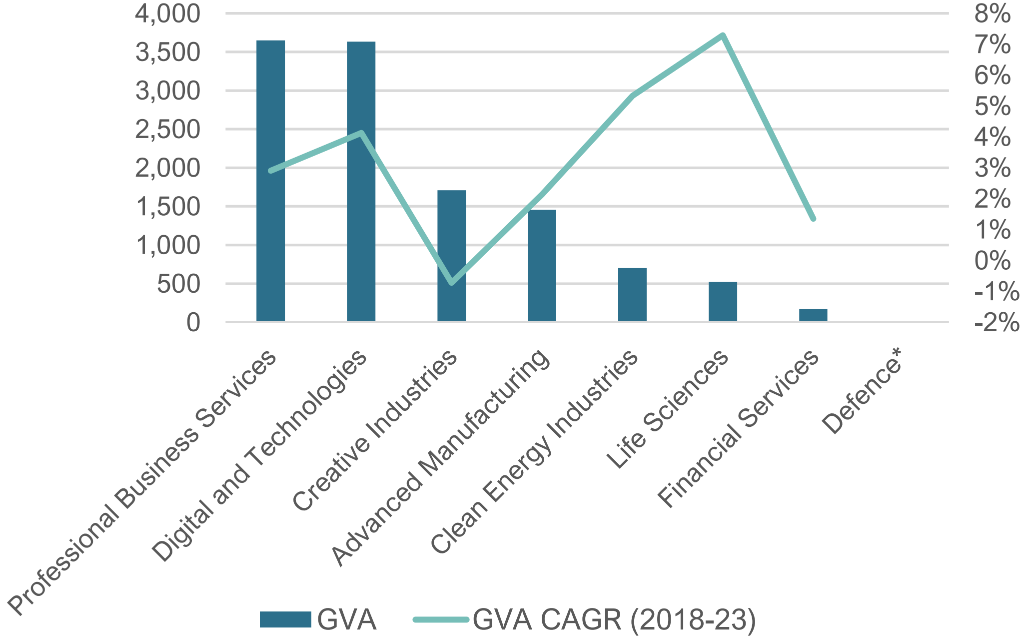
Professional Business Services is the largest of the Industrial Strategy sectors in Oxfordshire, but growth is steady and reflects maturity rather than momentum. Digital and Technologies combines scale with strong growth, while Clean Energy is growing quickly from a smaller base. Life Sciences is the standout: if the current employment growth rate is maintained, the number of people working in the sector would almost triple over the next decade.

Page 99

Size of employment vs. compound annual growth rate for Oxfordshire's IS-8 sectors



Size of GVA (£m) vs. compound annual growth rate for Oxfordshire's IS-8 sectors

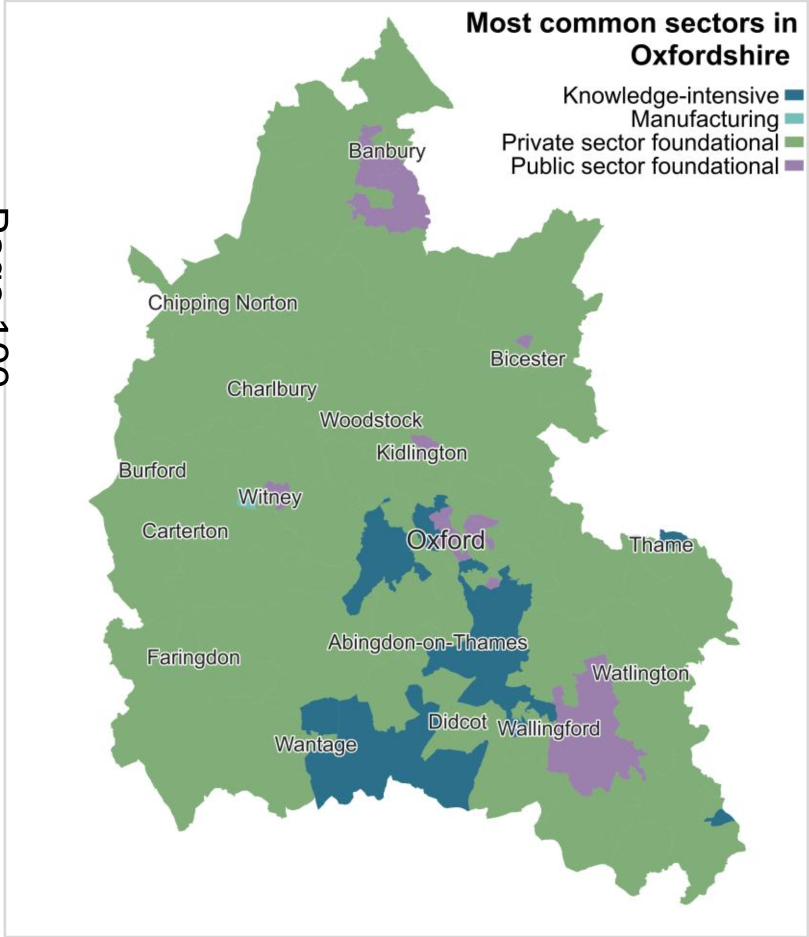


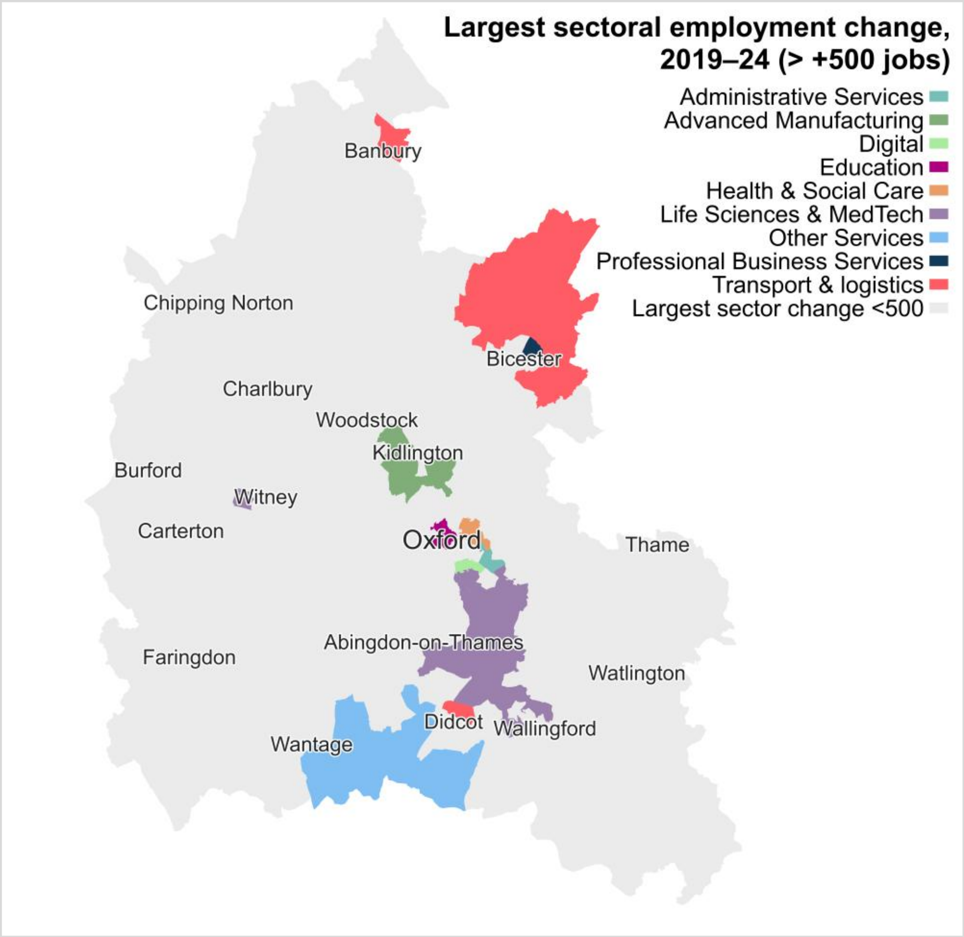
Source: Metro Dynamics analysis

** The official definition for the defence sector is narrowly focused on production of solely military goods*

Where is this happening?

Page 100





Most large employment gains in Oxfordshire are high-value and located outside the main towns and city. Advanced Manufacturing growth is concentrated around Kidlington, while Life Sciences growth is strong around Abingdon and Didcot.

By contrast, in the urban centres, the largest employment gains are more foundational in nature. In Oxford, growth is led by Education and Health, while in Banbury and Didcot, Transport and Logistics accounts for the largest sectoral increases.

Note: Knowledge-intensive sectors include professional and technical services, financial services, and information and communications. See next slide for full sector definitions.

Source: Business Register and Employment Survey (2024)

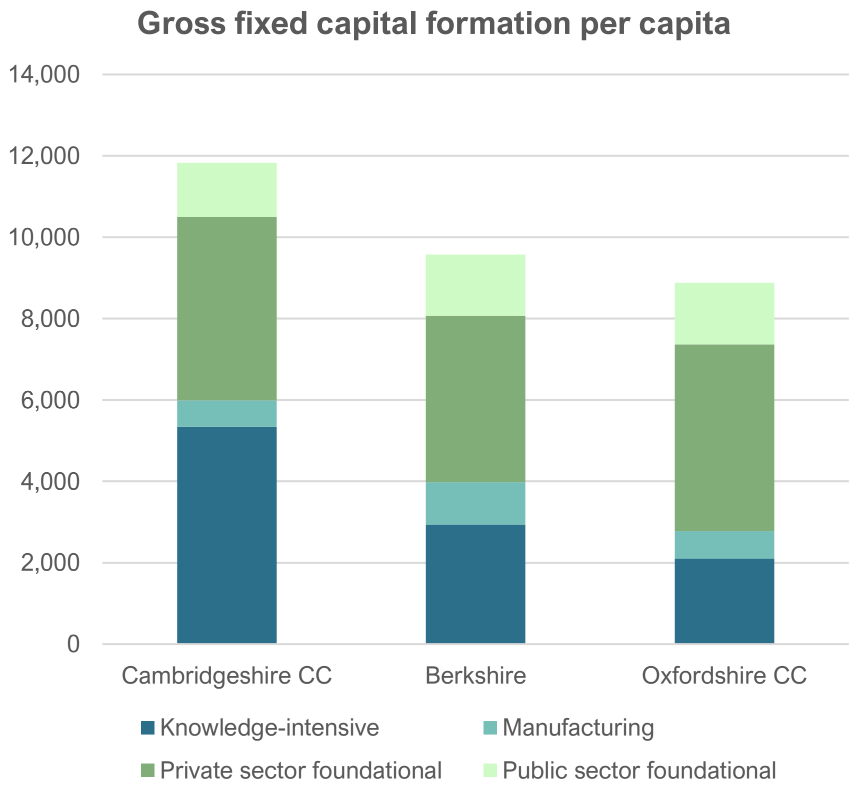
Businesses in the county are investing less locally

Despite the strength of Oxfordshire's innovation economy, **levels of business investment realised locally are lower than in comparable areas**.

On a per-capita basis, knowledge-intensive gross fixed capital formation (GFCF) in Oxfordshire is around **40 per cent of the level seen in Cambridgeshire**.

GFCF captures investment in capital assets such as labs, buildings, machinery and equipment, and provides an indication of how far firms are expanding and modernising their operations within the local economy.

This suggests that, while innovative firms and demand for growth are present, a smaller share of investment is being anchored locally.

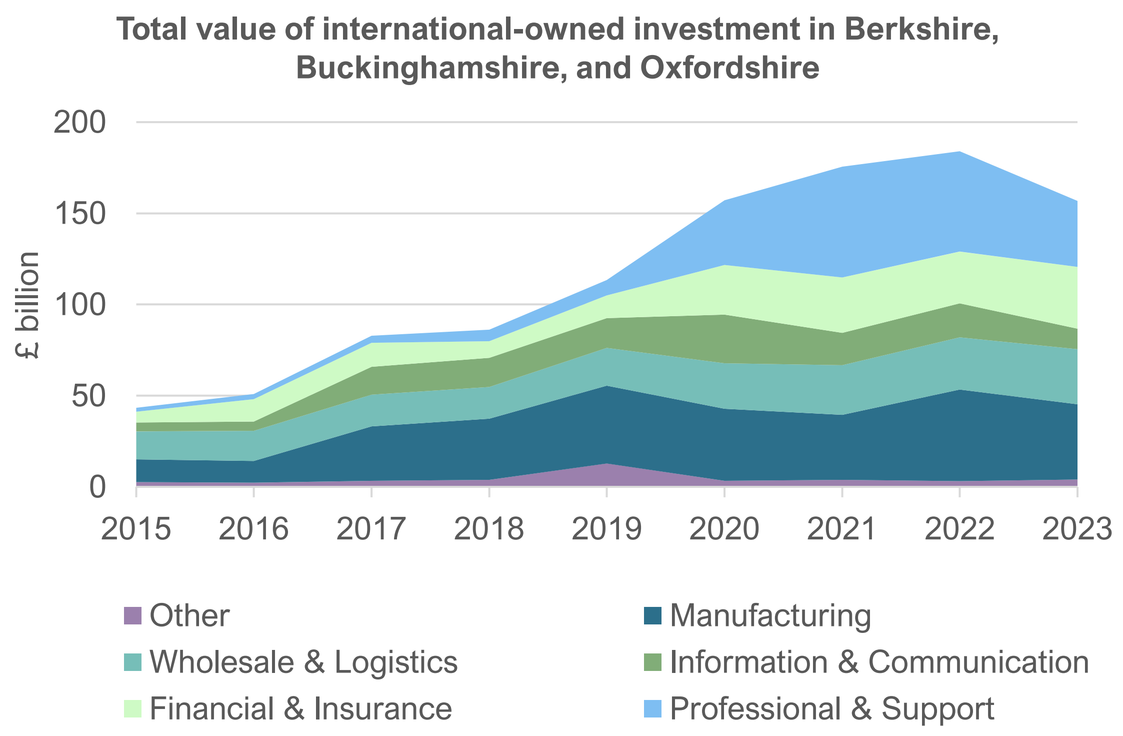


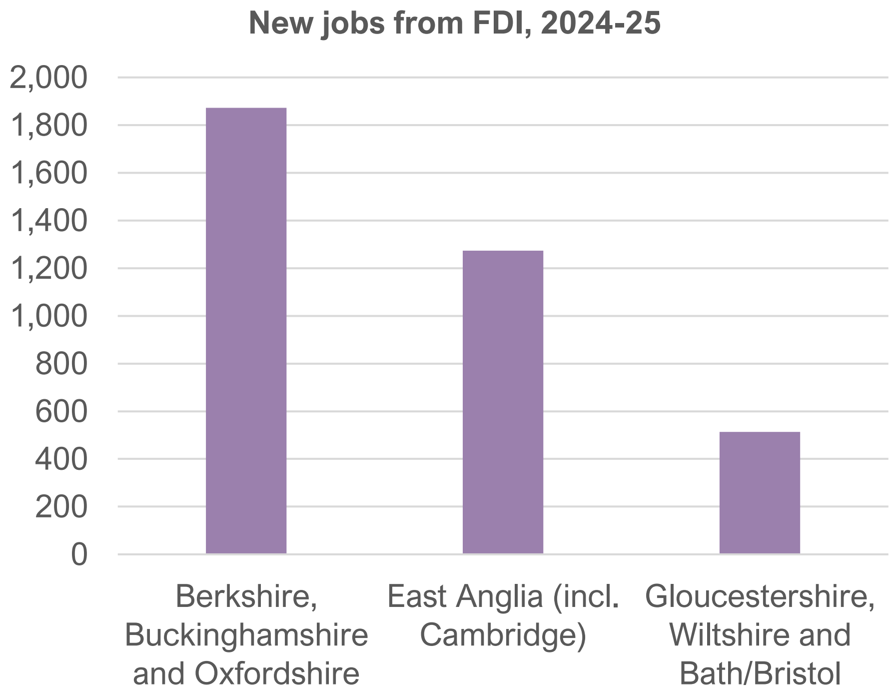
Grouped category	Sectors included
Private sector foundational	Wholesale and retail; Hospitality; Construction; Transport and storage; Admin and support; Arts and entertainment; Real estate; Energy supply; Other services
Public sector foundational	Health; Education; Public administration
Manufacturing	Manufacturing
Knowledge-intensive sectors	Professional and technical; Financial; Information and communications

Source: Metro Dynamics analysis

Oxfordshire generally performs well on FDI

Despite lower levels of business investment being anchored locally, Oxfordshire continues to attract significant external investment into the county. Over the past five years, **Enterprise Oxfordshire's inward investment team has supported 184 inward investment projects**, **securing c.£3.6bn of investment and supporting around 6,500 jobs across Oxfordshire.** These investments have been concentrated in science and technology sectors such as life sciences, healthcare, automotive, space and advanced engineering, but also include activity in parts of the foundational economy.





Source: ONS and DBT

Note: The lowest geography inward investment statistics are available is sub-regional

Metro——Dynamics

Business & Inward Investment

Objective	To drive greater value and impact from business and inward investment in Oxfordshire by attracting high-value and foundational economy businesses, strengthening SME growth, and anchoring more investment locally

Context

- Strong demand for employment land and housing for highly innovative and productive businesses concentrated around Greater Oxford, Abingdon, Culham, Harwell
- Connectivity barriers act as a further break on converting new and existing business investment
- Technical skills availability.
- Strong SME base, but access to markets, growth space and skills for growing foundation economy firms and potential supply chain firms in rural areas and market towns.
- High streets struggling for demand generation and access, including visitor economy.

Rationale for Intervention

- Potential for stronger integrated approach to investors – currently constraining potential impact
- Unlock untapped economic potential across the county
- Anchor more investment locally to maximise job creation and productivity
- Strengthen the SME ecosystem, especially in rural and market-town areas
- Enhance economic resilience by diversifying growth and investment

Draft Priorities

Now…

Drive more value and impact from increased inward investor support – with a clear priority to attract foundation economy and higher value business.

Strengthen productivity and growth in the wider SME base – further develop and deliver enterprise and growth support for SMEs – potentially with additional targeting or outreach in market towns and rural areas (e.g. food, visitor economy, retail and creative firms)

Next…

Optimise growth assets – with a clearer plan for housing, infrastructure, skills and land in Greater Oxford and Abingdon / Harwell / Cullum

Future…

Further integrate investment, cluster support and business growth support delivery across new unitary(ies) / Thames Valley.

Impact

- Broader, more inclusive growth across Oxfordshire, with benefits reaching rural areas, market towns, and a wider range of sectors
- Increased local business investment and higher-value jobs anchored in the county
- More resilient and diversified economy that can better withstand shocks and adapt to change
- Stronger SME ecosystem with improved access to markets, skills, and growth opportunities, supporting innovation and competitiveness

'Why now'	Oxfordshire's growth and investment are mostly concentrated in a few sectors and locations. Expanding this to more sectors and places will make the economy stronger and create more opportunities for residents.

Labour market and skills

Overall, Oxfordshire has a tight labour market and performs well across most educational and participation indicators

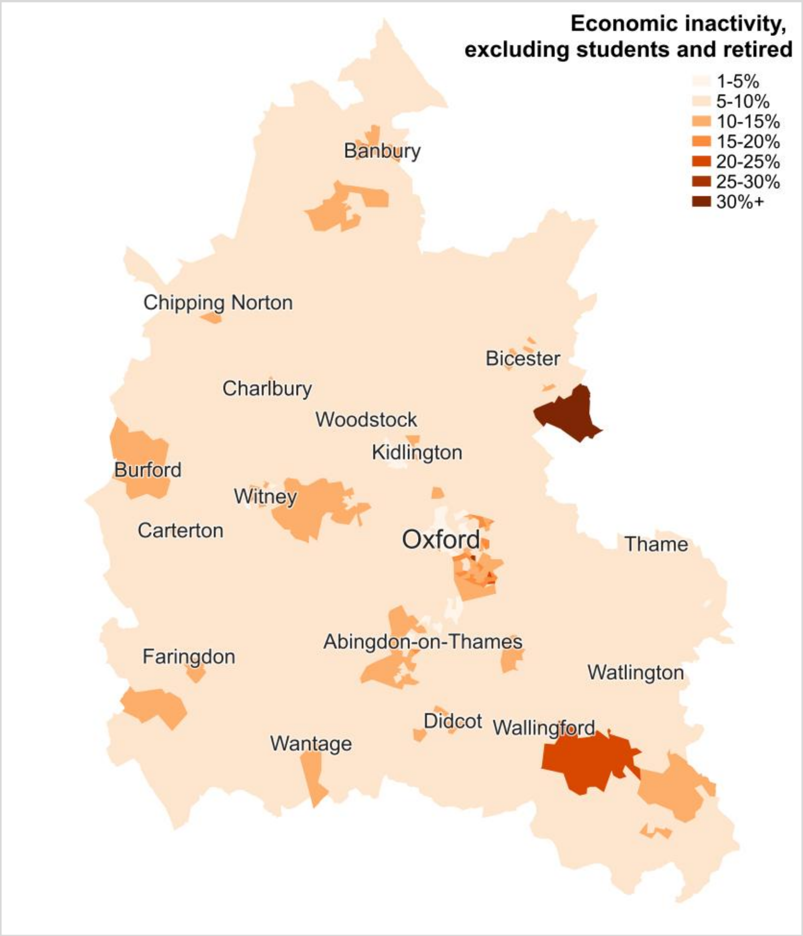
Oxfordshire has **over 60% of working-age residents holding a degree, significantly surpassing both regional and national averages**

Qualification Level	Oxfordshire	South East
RQF4 and above	61%	48%
RQF3 and above	78%	70%
RQF2 and above	93%	88%
RQF1 and above	94%	91%
Other qualifications	2%	4%
No qualification	4%	6%

Page 105

Overall, Oxfordshire's **employment rate stands at 83.9%, one of the highest in England** and exceeding the 80% target outlined in the *Get Britain Working* white paper. This is a very tight labour market, with limited available capacity and strong competition for skilled workers.

Despite Oxfordshire's strong labour market, **some urban areas** around the south of Oxford City, and parts of Banbury and Cherwell, **face low education levels and high youth NEET rates**. West and South Oxfordshire, **struggle with transport and digital access**, limiting education opportunities. Disadvantaged youth, minorities, and older rural workers face additional challenges adapting to the knowledge economy.



Sources: Annual Population Survey, Get Oxfordshire Working Plan

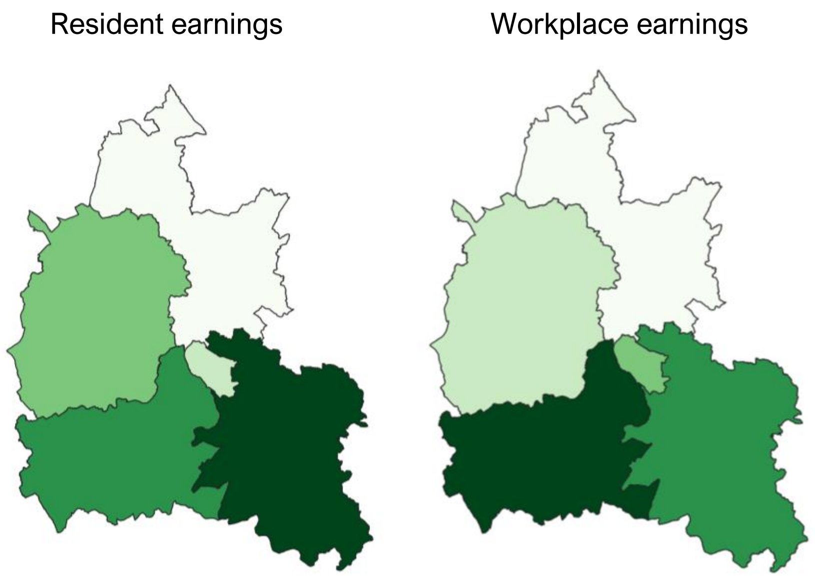
The labour market in Oxfordshire is influenced by the growth of key sectors and how talent is connected to these emerging opportunities.

Labour market opportunities in Oxfordshire vary by job concentration. Oxford city has many professional roles due to universities and research hubs, while South and Vale focus on science and innovation jobs. Cherwell and West Oxfordshire offer a mix of professional, retail, and manufacturing work.

Connectivity influences commuting patterns, with many residents traveling to higher-paid jobs or working remotely, leading to higher resident earnings in some areas. Conversely, Oxford and Vale of White Horse attract in-commuters, increasing workplace earnings.

The highly skilled workforce allows many residents to access professional jobs, but opportunities are unevenly distributed.

Resident vs workplace-based earnings (2025) (darker gradient = higher annual earnings)



Sources: Annual Survey of Hours and Earnings

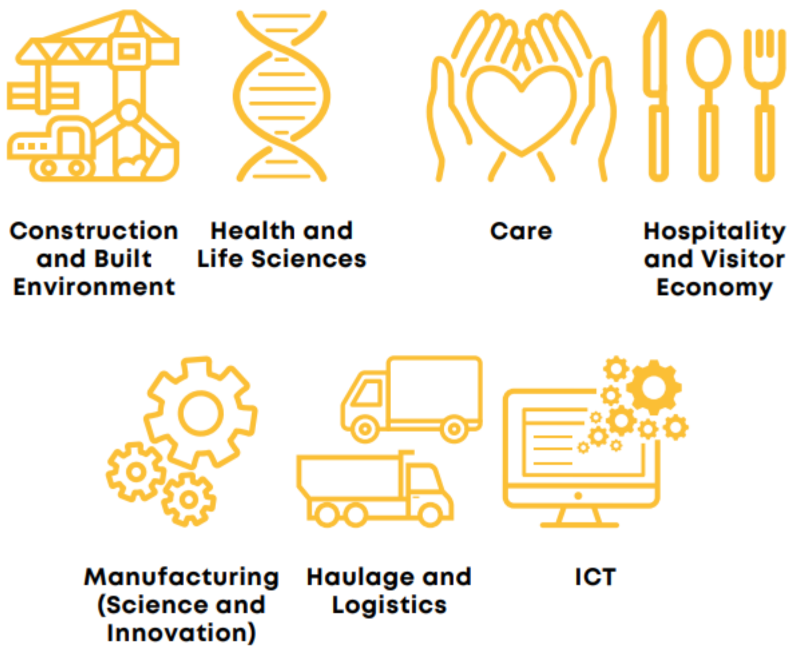
There is a need for the labour market to be more flexible to accommodate demands from key growth sectors

Oxfordshire’s labour market is near full capacity, leaving little spare labour to meet growing demand in high-value sectors or adapt to transitions. **To sustain economic resilience, labour and talent must be used productively through a flexible system that responds quickly to shifting needs**

LSIP evidence shows rising vacancies and skills gaps in a range of key sectors. Employers struggle to fill mid-level technical roles, especially in the SME-heavy economy where specific skills are required. **High housing costs and poor transport also hinder recruitment and retention**, particularly for HE and FE graduates

These labour shortages indicate misalignment with productive uses. Addressing this requires adaptable training, including flexible, modular options that enable rapid upskilling and tailored learning for employers

Priority sectors identified in the 2023 LSIP, based upon vacancy volume, structural recruitment barriers, and future opportunity



Sources: Oxfordshire and Berkshire Local Skills Improvement Plan, 2023

Metro——Dynamics

Labour Market and Skills

Objective	To ensure Oxfordshire's labour market remains productive, inclusive, and resilient by addressing skills shortages, improving access, and adapting to sectoral change

Context

- Oxfordshire has a tight labour market, high qualification levels, and strong participation
- Skills shortages persist across key sectors
- Recruitment and retention challenges especially for mid-level technical roles and SMEs
- Disadvantaged groups (youth, minorities, rural workers) face barriers to participation
- High housing costs and poor transport limit workforce mobility and access to jobs

Rationale for Intervention

- Labour market is near full capacity, so productivity and resilience depend on better skills alignment and flexible, responsive training
- Skills gaps and recruitment difficulties risk slowing growth in high-value sectors
- Addressing barriers for disadvantaged groups is essential for inclusive growth

Draft Priorities

Now…

Work to develop a Community Skills Plan – a structured approach to integrating skills development into the wider economic development framework:

- Enhance access to technical skills by collaborating with businesses to address shortages, as evidenced by LSIP findings. Build stronger partnerships to understand future demand – particularly in sectors that currently under-engage – recognising the constraints many employers face and the opportunity of aligning the apprenticeship levy.
- Strengthen links with schools at all levels, including early years, to support longer-term skills development and build a workforce pipeline.
- Partner with FE to develop targeted skills programmes linked to specific job opportunities, connecting inactive groups to sector demand, aligning with Get Oxfordshire Working where relevant
- Focus on flexible, modular training adaptable across related sectors, including competency-based provision for SMEs.
- Explore a skills mapping review to gather evidence on current gaps and embed a consistent approach to skills intelligence across the county.

Next…

Maintain ongoing skills programs during LGR to protect current efforts despite government changes

Create local labour market strategies, like a Science Vale Skills Plan, to meet specific regional needs.

Future…

Strengthen systems leadership around skills – coordinate and build relationships across stakeholders to ensure that any future powers (i.e. devolution of ASF) can be effectively utilised

Impact

- Reduced skills gaps and vacancies in priority sectors
- Improved recruitment and retention, especially for SMEs and in rural/ market towns
- Higher employment and progression rates for disadvantaged groups

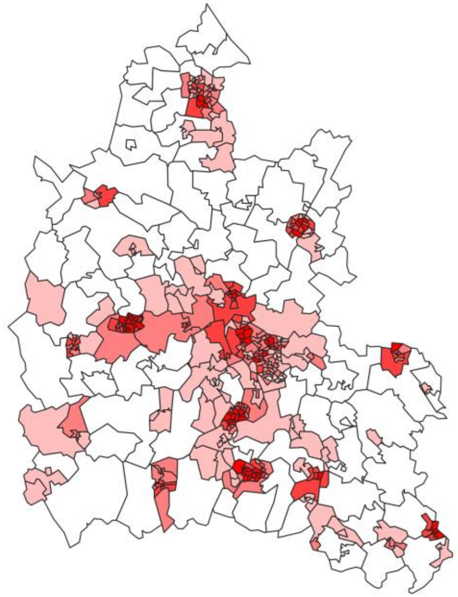
'Why now'	A tight labour market, sectoral skills gaps, and barriers for disadvantaged groups threaten Oxfordshire's ability to sustain economic growth and adapt to future opportunities

Housing

Oxfordshire has acute challenges around housing affordability

Page 110

IMD 2025 Barriers to housing deprevation (where 1 is 10% most deprived LSOA nationally)



Housing purchase affordability ratios						
Local authority name	1998/99	2004/05	2009/10	2014/15	2019/20	2023/24
Cherwell	4.29	8.11	7.76	8.28	8.95	8.86
Oxford	5.66	9.56	9.28	9.65	10.24	10.42
South Oxfordshire	5.80	9.21	10.12	9.77	10.59	9.87
Vale of White Horse	5.03	8.26	7.96	7.71	8.67	8.59
West Oxfordshire	5.13	8.95	9.19	8.94	9.49	9.09
England	4.37	7.67	7.59	7.6	7.98	7.89
South East	4.74	8.27	8.22	8	9.08	9.24

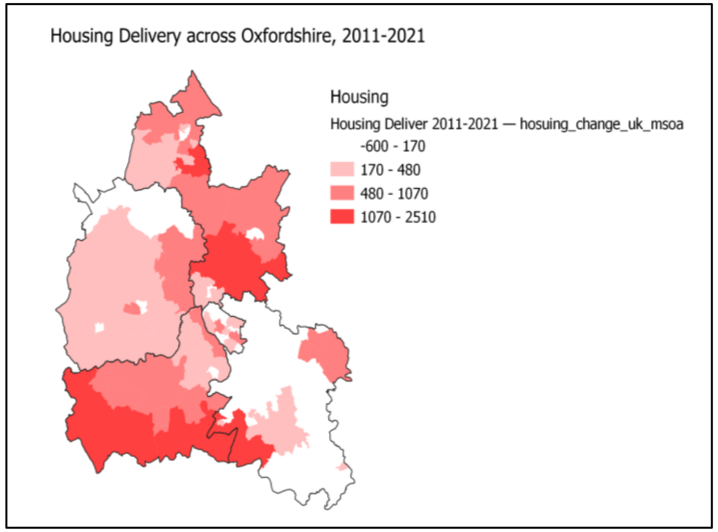
- **Housing availability and affordability are key constraints to Oxfordshire's economic strength**, affecting business talent attraction, labour participation, and high-value sectors

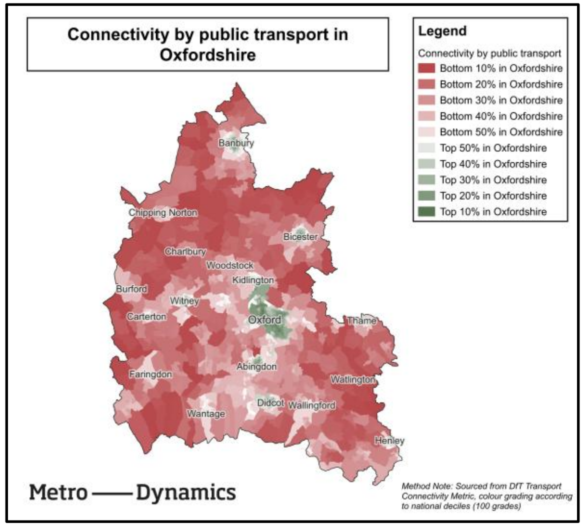
- Rising house prices and rents reduce affordability, hinder recruitment, and increase long commutes, straining transport and productivity

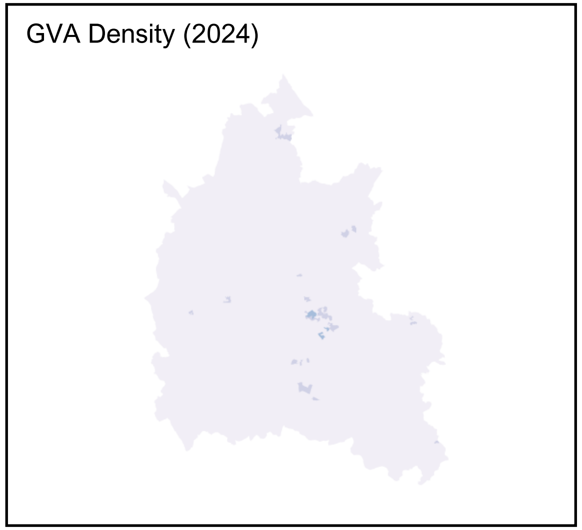
- The 2025 IMD shows Oxfordshire, especially near Oxford City, faces serious housing deprivation, impacting affordability, service access, and sustainable growth.

Sources: IMD 2025, MHCLG 2025

Recent housing developments have primarily occurred in some of Oxfordshire's least accessible areas, rather than near major economic centres







Between 2011-2021, most new housing was built in the south of Vale of White Horse and Cherwell. However, this **delivery pattern raises concerns about alignment with economic priorities**, as housing on the outskirts increases commuting distances for residents seeking jobs, education, and services

Based on DfT Connectivity Data, these areas have some of the poorest public transport links in Oxfordshire and are distant from major economic centres like Science Vale, Oxford City, and key town centres. These hubs offer high-value jobs in life sciences, technology, and education. **Housing located far from these centres without reliable transport limits residents' access to these labour markets**, potentially restricting economic productivity and workforce availability.

Notably, **housing delivery in Oxford City has been low compared to its connectivity and economic opportunities**. This under-delivery suggests Oxford is not densifying adequately, limiting its capacity to support population growth near jobs, services, and infrastructure.

Sources: VOA 2023 Release, new Council Tax registration, Rounded Natural Breaks, DfT Transport Connectivity Metrics, Regional GVA estimates ITL 3

Housing delivery lags behind targets, indicating an opportunity for place-based growth tied to infrastructure and employment

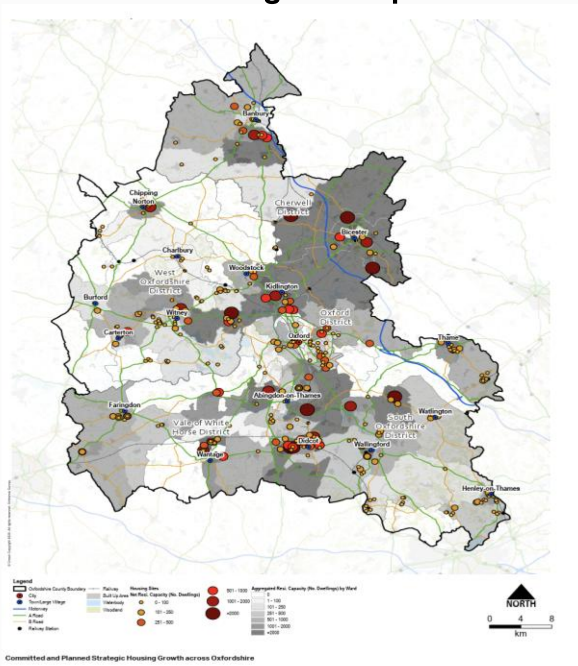
As noted by the Oxford Growth Commission, **Local Plans have failed to meet the minimum housing targets**, resulting in a backlog and slowing the pace of development. The gap between actual housing delivery and national expectations has increased, especially in Oxford and West Oxfordshire, following updates to the NPPF methodology.

The Oxfordshire Infrastructure Strategy indicates that **future housing growth is more closely tied to new employment land development**, strengthening the connection between residential areas and workplaces.

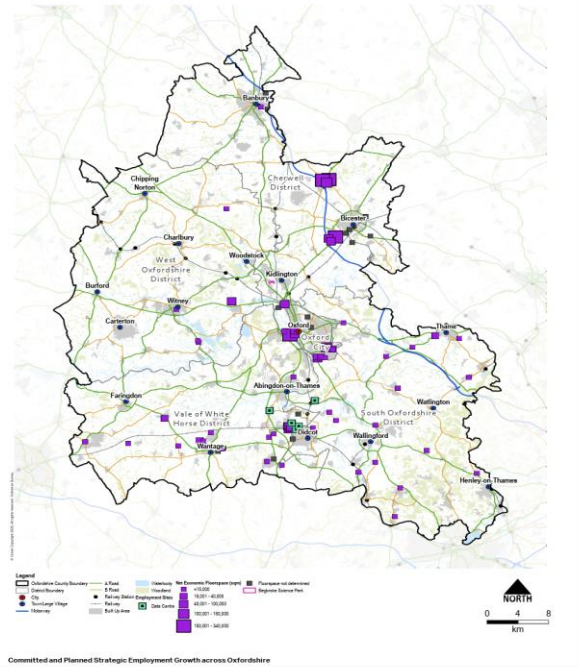
The **Oxford Growth Commission emphasises the importance of viewing housing delivery through the lens of place-based opportunity areas**, which are closely linked to transport and infrastructure projects, such as those made possible by the reopening of the Cowley Branch Line.

LA	Actual Net Additional Dwellings (2024/25)	Difference to old LHN Standard Method	Difference to new LHN Standard Method
Cherwell	717	11	-401
Oxford	250	-512	-837
South Oxfordshire	794	215	-448
Vale of White Horse	1193	560	244
West Oxfordshire	304	-245	-601

Planned housing developments



Planned employment space developments



Sources: OxIS Baseline report 2025, Net additional dwellings live tables, Ministry for Housing and Local Government

Metro——Dynamics

Housing

Objective

Enable good growth in Oxfordshire by tackling housing affordability and spatial misalignment to attract and retain talent, support strong communities in great places and support businesses and sustain productivity

Context

- **Affordability is structurally high across the county**
- **Spatial misalignment of new housing** – since 2011, substantial delivery has tended to the southern peripheries, not near major employment centres; this results in lengthened commutes and weaker labour market access
- **Deprivation within otherwise successful places** – IMD 2025 highlights nationally significant Barriers to Housing and Services, particularly in and around Oxford City
- **Plan and delivery gap** – a widening gap between council plans and minimum housing need under new method
- **These weaknesses underpin public resistance** to housing growth, as local people can see what isn't working and that the benefits aren't good enough.

Rationale for Intervention

- **Good jobs, wages and competitiveness depend on workforce access** – high housing costs and poor proximity to jobs impair firm's ability to attract/retain talent and depress participation and productivity in high-value sectors
- **Good growth requires an integrated spatial strategy** – stresses coupling housing allocations with transport and infrastructure to reduce cost/friction of access, unlock sites, and shorten commutes, especially around Oxford and science hubs
- **Equity and resilience** – concentrations of deprivation related to housing and access mean interventions must also improve inclusivity and service connectivity, not just total units
- **Delivery credibility**

Potential Priorities

Now…

Work to develop **non statutory good growth plans** for key areas, showing how housing, skills, employment land and infrastructure is supporting good growth for communities and investors.

Support Oxford Growth Commission case for new powers and funding

Next…

Ensure that **powers for future delivery vehicles** e.g. development corporations in Greater Oxford are deployed effectively.

Future…

Create an **integrated statutory spatial strategy** for the County as a whole / new unitaries – bringing together nature, housing, infrastructure, employment land

Impact

- **Productivity uplift** – better worker-job proximity and reduced travel friction support higher GVA per worker
- **Inclusive access** – targeting affordability barriers in specific neighbourhoods improves participation and equity
- **Carbon & health co-benefits** – shorter commutes and mode shift reduce emissions and improve well-being; integrated planning avoid car-dependent patterns
- **Market confidence** – a credible, sequenced pipeline mitigates delivery risk and signals investability for institutional capital

'Why now'

Persistent affordability pressures, widening delivery gaps, real resident concern about housing growth, environmental concerns and national Government drivers for housing and infrastructure alignment.

Spatial approach to developing interventions

Page 114

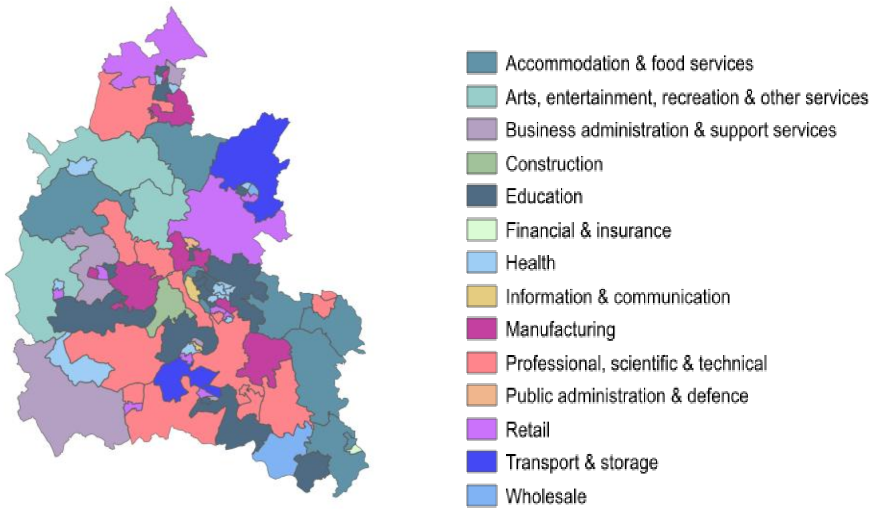
Although Oxfordshire faces common challenges, in some areas these issues manifest differently, interacting uniquely with the local conditions

Phase 1 findings show that **Oxfordshire has a complex, polycentric economy with varied spatial dynamics and sector specialisations**

Oxford is a knowledge-focused city, Science Vale is an innovation hub, and Banbury and Bicester are traditional market towns. **Economic challenges and opportunities differ across these areas**

This work seeks to align priorities with key locations and create a framework for place-based economic planning that reflects local strengths and development paths.

Primary sector of employment by MSOA



Source: Business Register and Employment Survey (2024)

Why do you need a spatial approach to economic development?

- Current strategies demonstrate a high level of generality at the thematic level – this is necessary at the county level, but a different approach is required to address Oxfordshire's opportunities and barriers to growth.
- The structure of your economy is spatially varied, with different assets and drivers for growth, and needs in different places, with the potential to also work well as a whole Oxfordshire unit.
- Addressing this requires a **spatially integrated approach to economic development,** specifying a combination of interventions and actions required to support your vision for good growth
- We suggest developing a spatial economic development framework of tailored and integrated interventions for a small set of places, to agree with you and to justify delivery action in the short, medium and long term.
- This does not mean you will not need any county-wide delivery mechanisms, but rather delivering at this scale will be more impactful if spatially tailored and integrated.
- Report 2B provides analysis around four of Oxfordshire's key growth locations alongside some overarching priorities

3 Waterhouse Square
138 Holborn
London
EC1N 2SW

020 3865 3082

1 St Peter's Square
Manchester
M2 3DE

0161 8833736

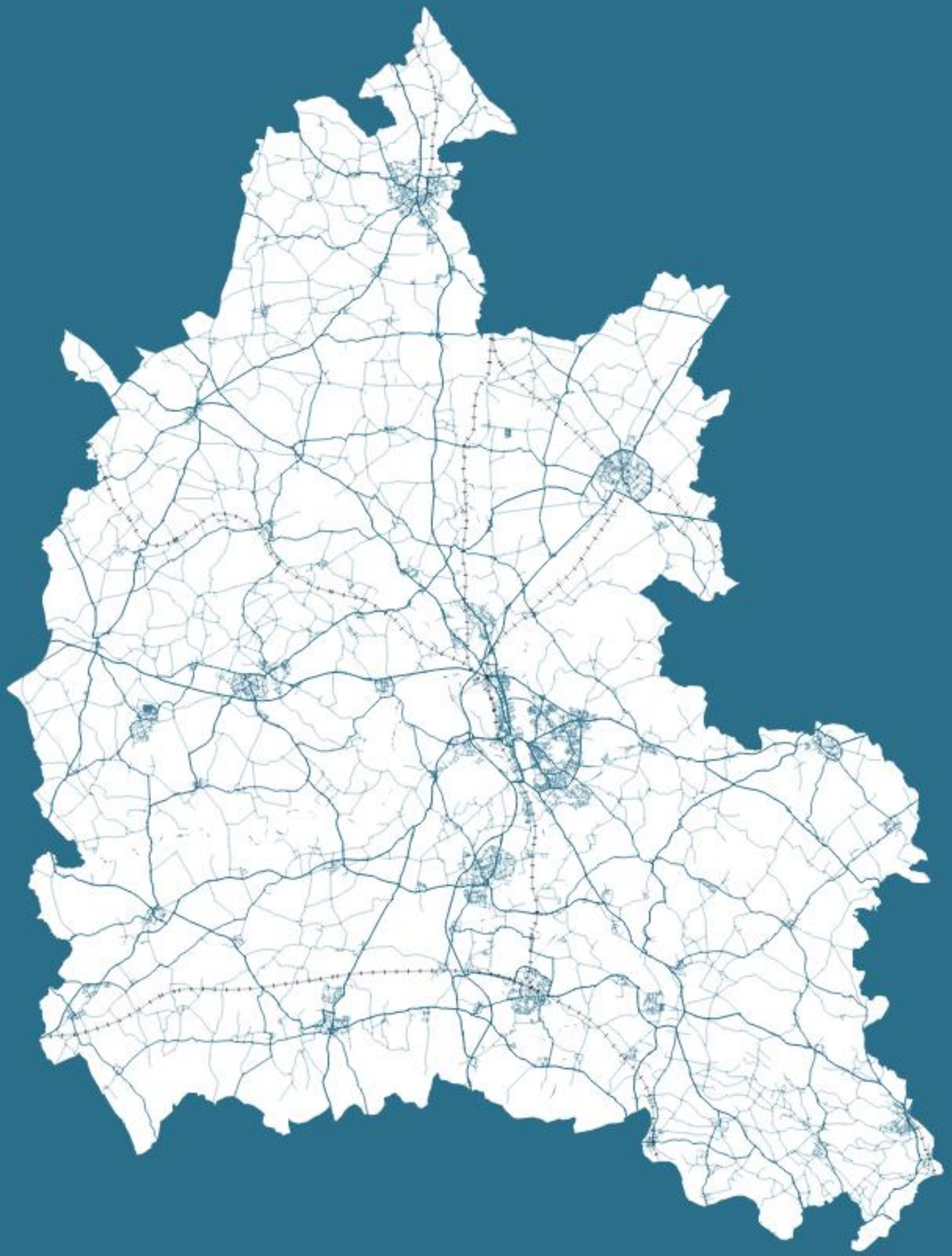
This page is intentionally left blank

Metro——Dynamics

Future Oxfordshire Strategy

Phase 2B Report

Spatial economic strategy and delivery framework

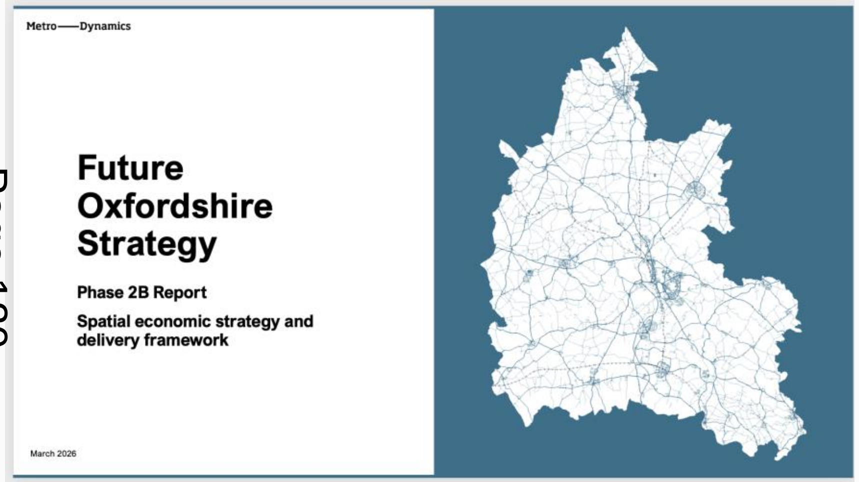


March 2026

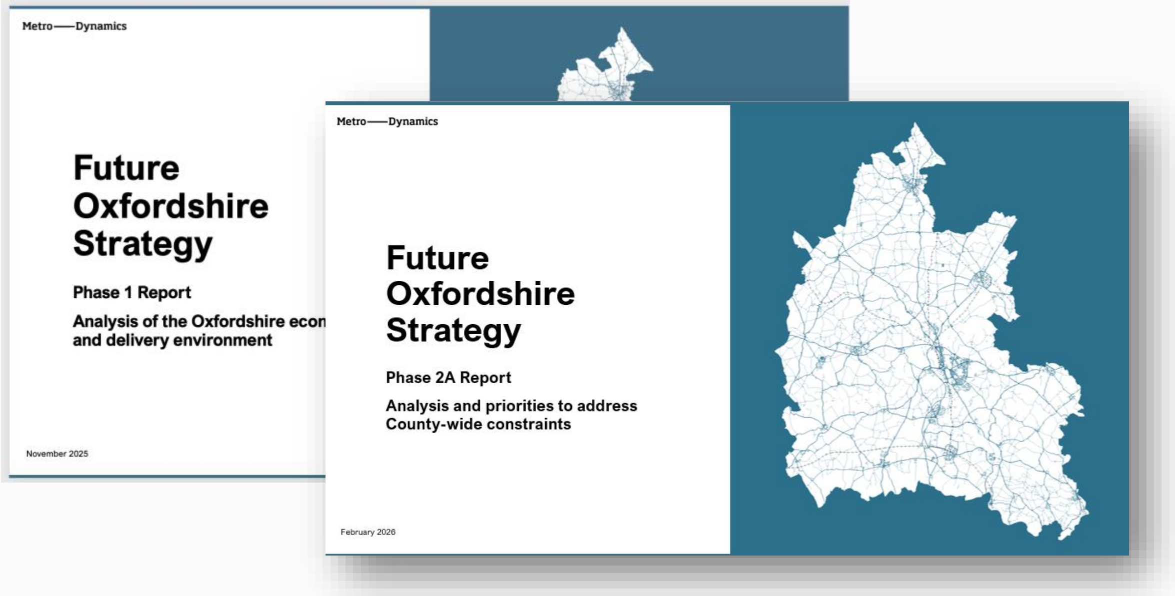
Metro——Dynamics

Introduction to this report

Page 120



This report is the final output of Phase 2B of the Future Oxfordshire Strategy project, which aimed to develop a spatial view of strategic economic priorities and set out a framework for how partners in the local government system and wider stakeholders can work together to deliver economic development to address these priorities.



It follows two other reports from this project. Phase 1, which assessed the structure, composition, performance and delivery environment of the Oxfordshire economy, to scope what is needed from a Future Oxfordshire Economic Strategy, and Phase 2A, which set out Oxfordshire-wide strategic economic priorities, against clear evidence of growth opportunities and constraints. Phase 2B builds from both reports, including translating county-wide priorities into key spatial economic areas.

Report 2A highlighted a number of constraints that are shared across all of Oxfordshire which require county-wide intervention

	Context	Selected County-wide Priorities
Sectors & Investment	• Growth and investment highly concentrated in a small number of high-value sectors and locations • SME base strong but unevenly supported • Connectivity barriers act as a further break on converting new and existing business investment	• Drive more value and impact from increased inward investor support • Strengthen productivity and growth in the wider SME base • Further integrate investment, cluster support and business growth support delivery
Skills & Labour Market	• Oxfordshire has a tight labour market, high qualification levels, and strong participation • Skills shortages persist across key sectors • Disadvantaged groups (youth, minorities, rural workers) face barriers to participation	• Improve access and provision for technical skills where there are known current and future shortages • Ensure continuity of skills programmes during LGR • Develop place-based labour market strategies
Housing	• Affordability is structurally high across the county • Spatial misalignment of new housing • Plan and delivery gap • Public resistance to housing growth	• Work to develop non statutory good growth plans • Support Oxford Growth Commission case for new powers and funding • Ensure that powers for future delivery vehicles e.g. development corporations are deployed effectively

Source: OxIS Baseline Report, State of Nature in Oxfordshire, IMD 2025, Oxfordshire Health and Wellbeing Strategy, Metro Dynamics analysis of ICB Data, Metro Dynamics analysis of Gross Fixed Capital Formation

Why does Oxfordshire need a spatial approach?

The structure, composition and performance of Oxfordshire's economy and its future growth opportunities and constraints exist differently in different spatial areas of the county, with overlaps across the county boundaries.

Oxfordshire is an economic powerhouse that is spatially diverse and complex, with a range of sectors contributing to growth. The county has an opportunity to secure good growth outcomes, but precisely what this looks like varies place to place. There are varying demand and supply-side constraints on growth, and the levers to impact them are fragmented between Oxfordshire County Council (OCC), Enterprise Oxfordshire (EO) and District and Borough Councils, as well as other partners.

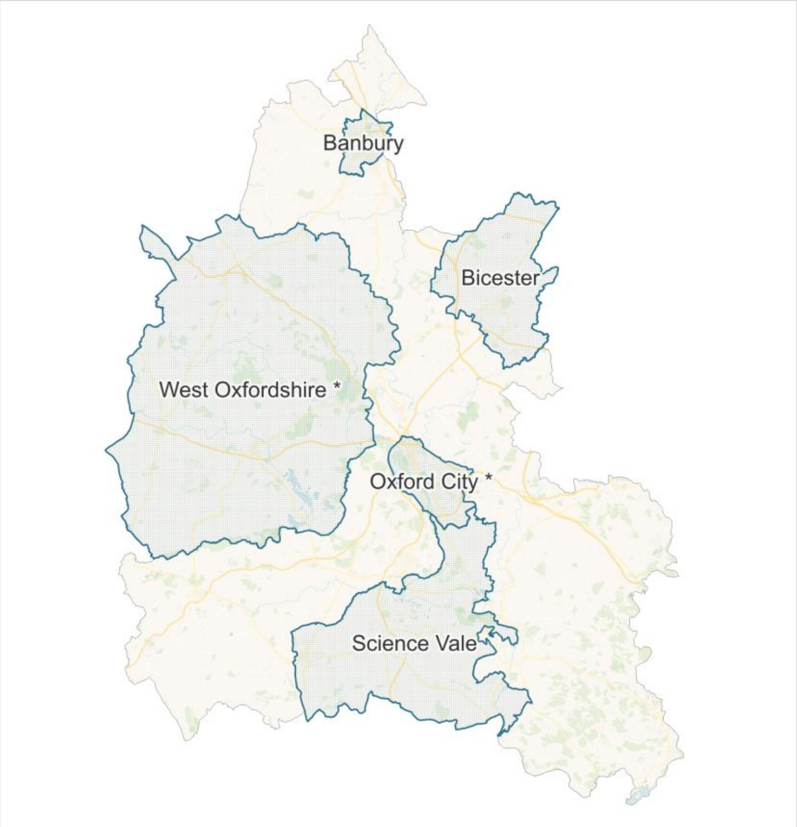
Local government reorganisation, potential devolution, and wider activity led by the Government's Oxford Growth Commission and across the OxCam Corridor, present opportunities for new and strengthened economic development, but risk complicating collective local action in the next 1-3 years. Local economic leadership in Oxfordshire need a joint framework to guide and focus economic development action, so that specific spatial opportunities and constraints that require intervention are addressed and inclusive benefits can start to be realised through this period of change.

This report sets out a spatial economic strategy and delivery framework for 4 spatial areas in Oxfordshire, which reflect the complexity and diversity of growth opportunities and constraints in the county. This does not aim to be a new longform strategic economic plan, but instead a product that:

- Shows where growth is likely to happen spatially and where there are sectoral opportunities. Not detailed site allocations, but a view of how sector strengths and business dynamics manifest in places.
- Translates analysis into insight into economic priorities, creating a logical link between evidence and choices for deploying collective economic development resources and interventions over time.
- Does not replace existing or future district level economic strategies and seeks to complement these through a more focused approach on practical interventions that can and should be delivered by OCC, EO, District and Borough Councils, and other partners.

The rest of this report sets out economic analysis of growth opportunities and constraints in 4 spatial areas, and collective economic and delivery priorities to respond to these. It has been developed in collaboration between OCC, EO, District Economic Officers and the Economic Partnership Board.

4 priority spatial areas for focused economic intervention



Page 123

This report examines four spatial areas in Oxfordshire and sets out economic priorities and delivery interventions for each one

This comprises a spatial economic strategy and delivery framework to focus OCC, EO and District and Borough activity collectively over the next 1-3 years, supporting partners to navigate external change and to invest in economic development activity in a practical and focused way. The four spatial areas are:

1. **Banbury and Bicester, p8-19:** Cherwell's two principal towns with distinct economic roles - Banbury as a key employment and logistics centre, and Bicester as a high-growth town with a strong retail-led visitor economy and future mobility focus
2. **Oxford City, p20-31**: Oxford's wider functional economic area, focusing on the city and its connected labour markets, supply chains and knowledge-based growth.
3. **Science Vale, p31-44**: Southern Oxfordshire's science and innovation corridor, centred on Harwell, Milton Park and Didcot
4. **West Oxfordshire, p45-54** : A rural and market town economy, with a strong visitor and leisure offer and a major defence asset.

Note: for the non-LA boundaries, map shows best-fit MSOA definitions

Principles for developing a spatial economic strategy and delivery framework

This spatial economic strategy and delivery framework is intended to be a different kind of product to economic strategies that have been developed at the county and district level – one that is deliberately highly focused on a small number of priority interventions delivered by partners.

The following principles define the purpose of spatial economic priorities and what the delivery framework should and should not contain for each area:

1. The delivery framework can include collective and individual organisational interventions, from those to be delivered by Districts to those delivered by EO and OCC. In the case of the latter two organisations, this would be delivered by a county-wide vehicle but with interventions tailored directly to area-based priorities.

2. The priorities and framework must focus on specific, near-term objectives, defined by what is most useful to work on in the next 1-3 years to make a direct impact on the *specific* growth opportunities, drivers and related constraints in the area. For example, this could be through targeted inward investment and promotion, hyper local skills actions, focused business support for specific cohorts of businesses, practical action to accelerate planning and development.

3. Avoid focusing on broader strategic objectives that are important but not as directly impactful on growth sectors, projects and constraints. For example, interventions to improve air quality are important but are not likely to make a direct impact on growing life sciences in the county.

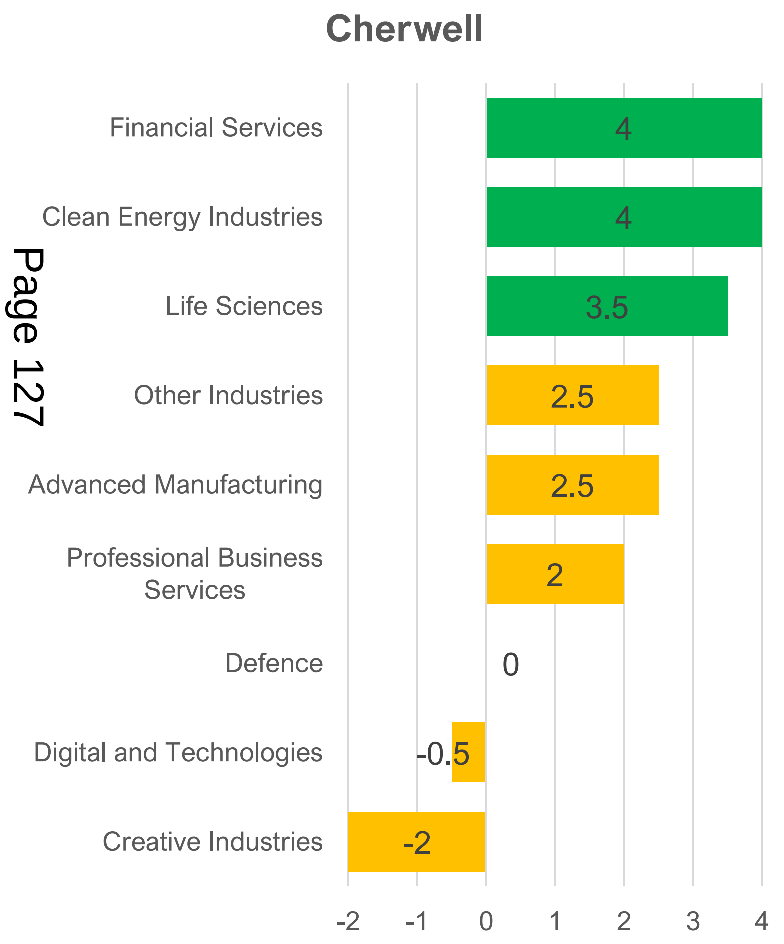
4. The framework should be clear where interventions are new, or are adaptations to existing approaches, where additional investment or a larger scale of activity is required.

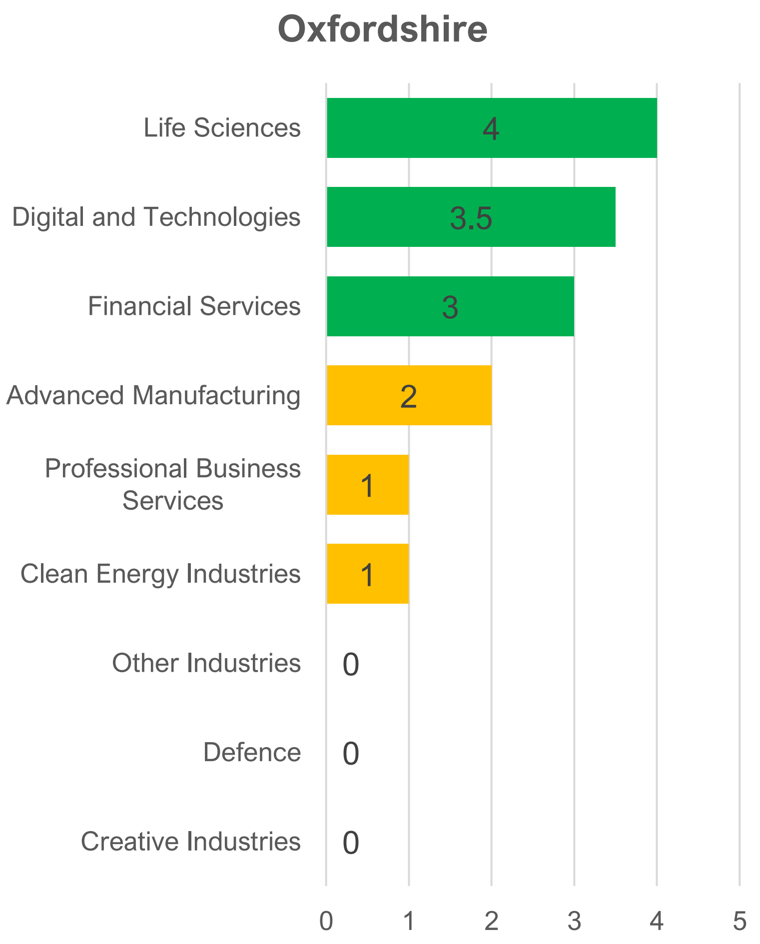
5. The priorities and framework should assume an environment for collective leadership and action and specify mechanisms for enabling this. For example, establishing a new multi-partner delivery group to agree an action plan and collectively manage progress.

Phase 2b

Banbury and Bicester

Cherwell's sector growth profile is healthy, but less life sciences-led than the county as a whole





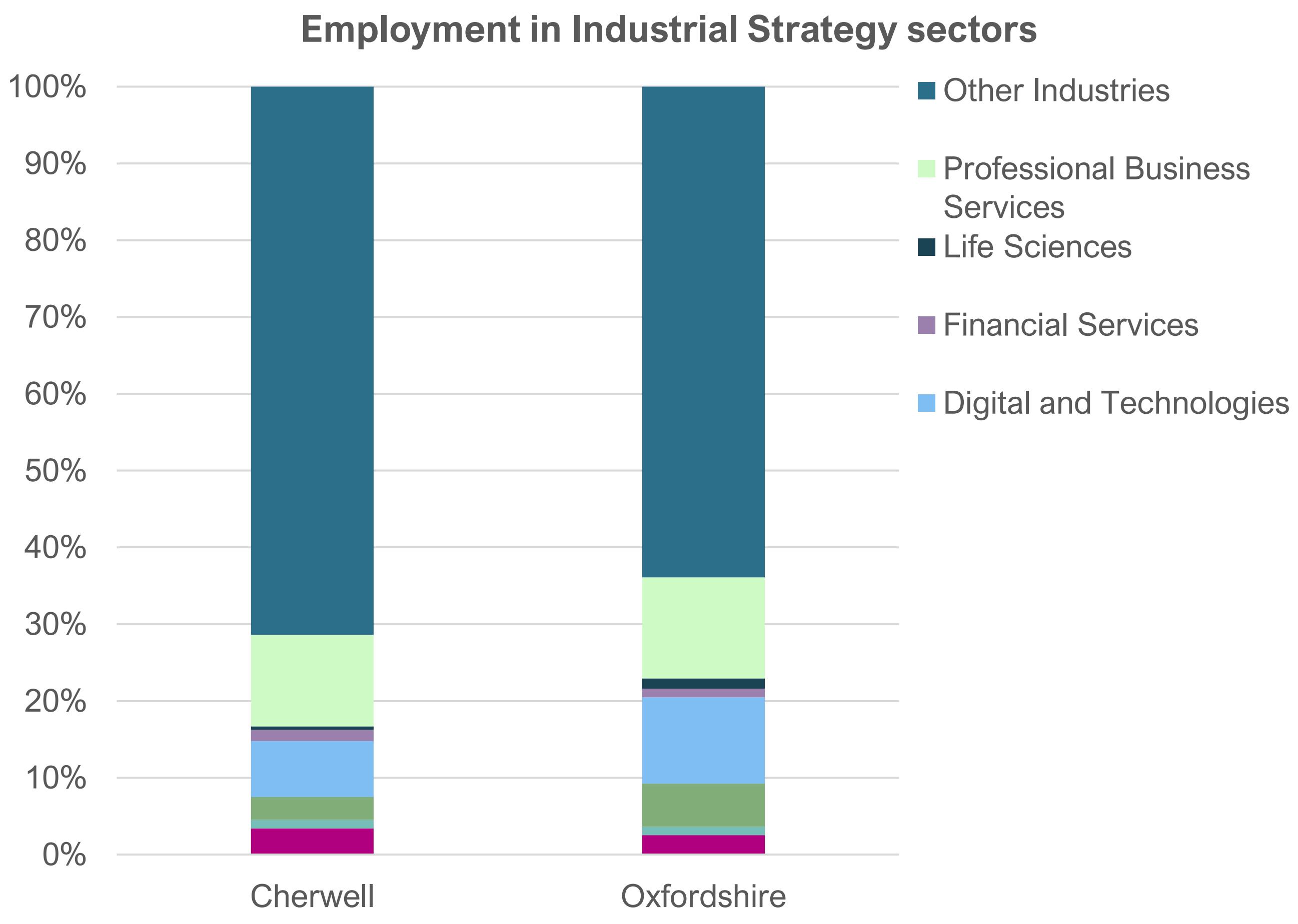
Cherwell is seeing positive growth across several priority sectors.

That said, its life sciences performance is more moderate than in the county – with a score of 3 indicating growth across multiple measures – in contrast to Vale, for example, which recorded a score of 7, reflecting growth across all indicators.

A notable feature of Cherwell's profile is growth in non-Industrial Strategy sectors, which are flat across the rest of the county, pointing to a more mixed growth pattern.

Source: Metro Dynamics analysis

This Industrial Strategy growth is from a lower starting base in several sectors



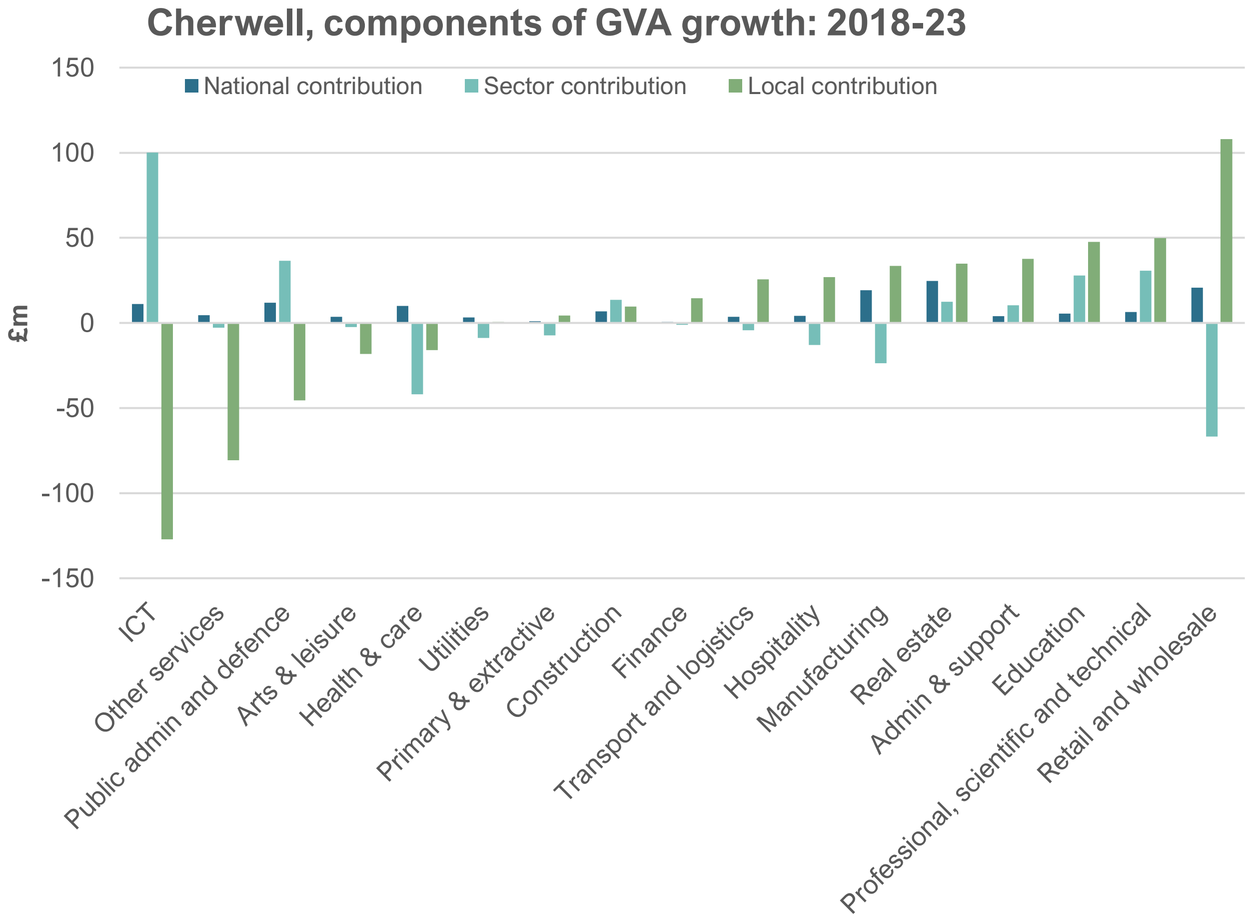
Cherwell has a much smaller existing base in life sciences and digital activities than Oxfordshire overall, so positive growth momentum should be understood in this context.

The district's profile reflects relative strengths in advanced manufacturing, focused primarily around Motorsports Valley, and a larger share of activity in non-Industrial Strategy sectors.

The emerging Clean Tech and Future Mobility Cluster – anchored by Bicester Motion – presents a significant opportunity to attract and land high-value firms within the district and close to Bicester.

Source: Business Register and Employment Survey

Cherwell's growth is driven more by local effects than by sector or national trends



Shift-share analysis breaks local economic growth into three elements: growth driven by the national economy, growth explained by national sector trends, and a local (or competitive) effect, which captures growth that cannot be explained by either and therefore reflects place-specific factors such as local specialisms, business performance, or competitive advantage.

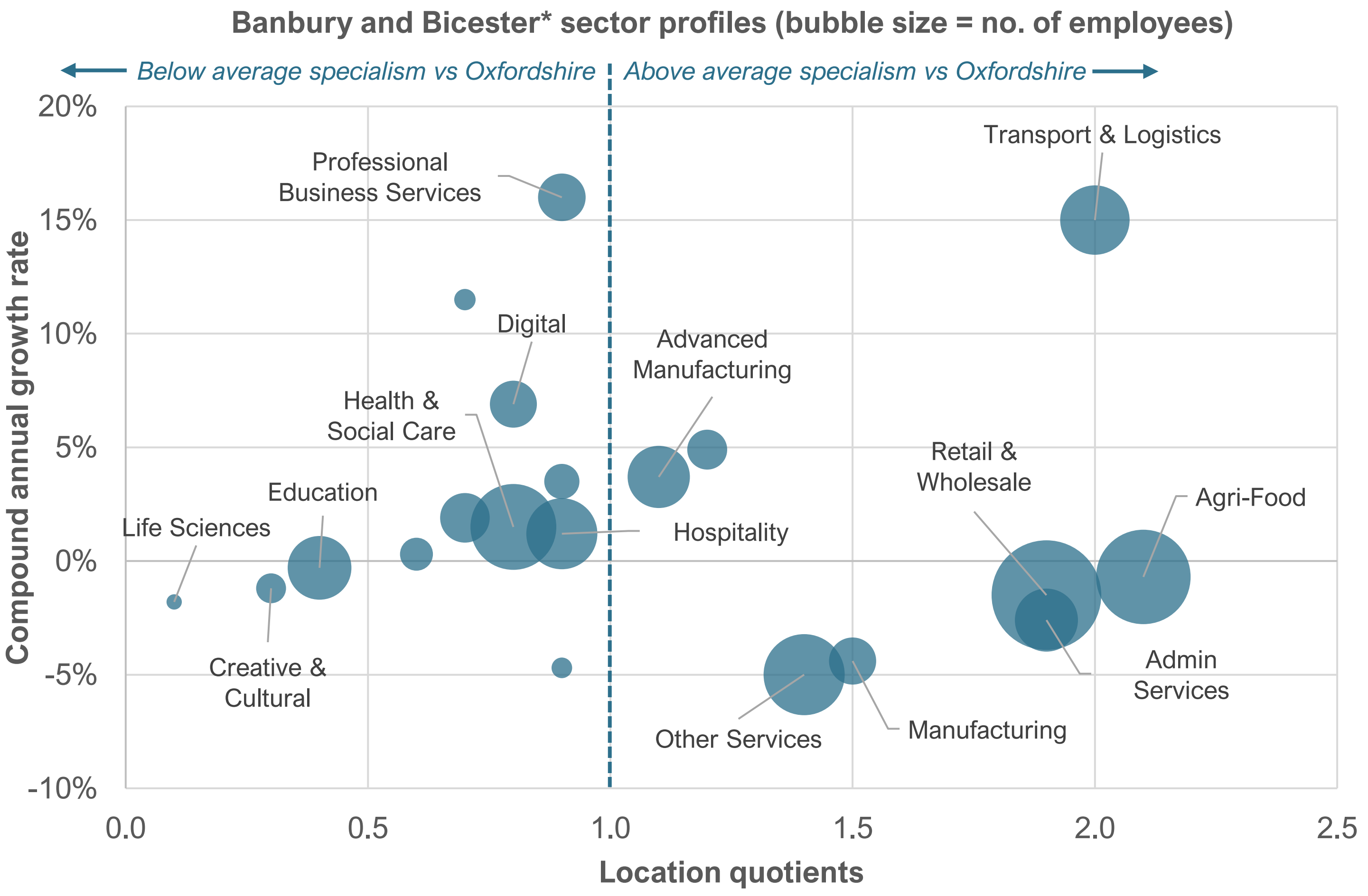
This analysis shows that Cherwell's recent GVA growth has been driven primarily by local competitive factors – accounting for around two-thirds of the growth above the national trend – in contrast to Oxford City and the overall county.

These local effects are concentrated largely in foundational activities, with retail and wholesale and manufacturing both outperforming despite weak national sector performance.

By contrast, information and communication shows negative local effects, acting as a drag on overall growth despite positive sector tailwinds, with a similar pattern evident in 'other services'.

Source: Metro Dynamics analysis

At town level, this foundational element is more pronounced, with transport and logistics a clear standout



Transport and logistics combines a high level of specialisation relative to Oxfordshire with rapid recent employment growth, pointing to a strong and distinctive local advantage.

Professional business services is also growing quickly, but from a lower concentration than the county average.

Knowledge-intensive sectors are generally smaller in scale and play a more limited role in overall employment growth.

Source: Metro Dynamics analysis

Population skill levels in Banbury and Bicester reflect this mix of sectors

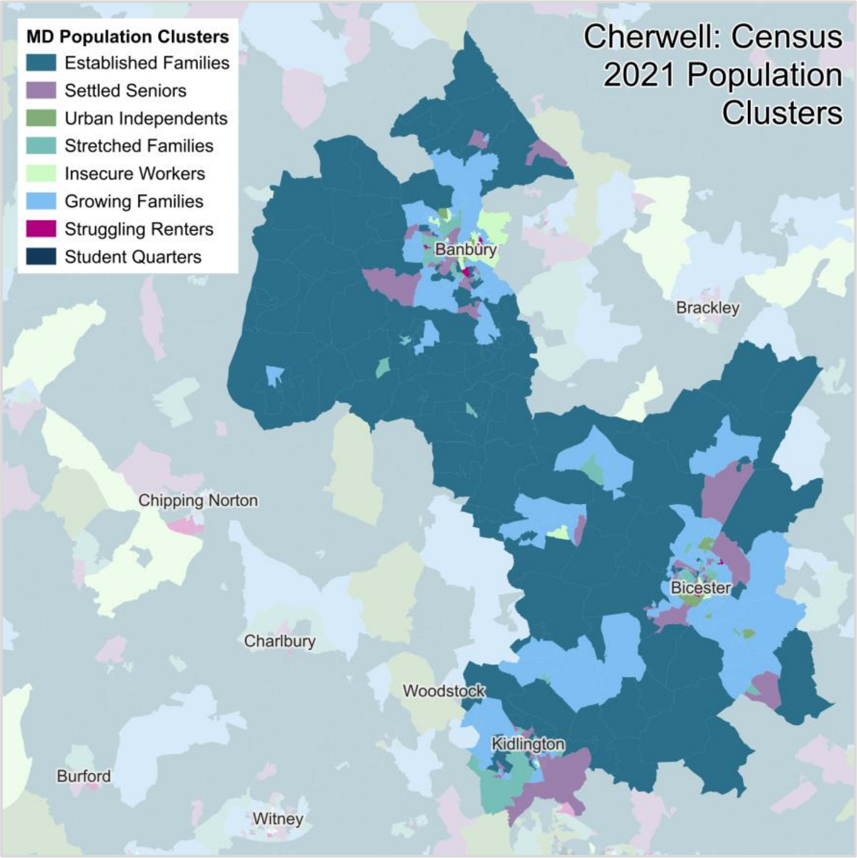
The towns have a higher share of residents with no qualifications and lower attainment at Level 4 and above than the district and county, while mid-level qualifications are broadly similar.

Cherwell as a whole sits between the towns and the wider county, with Oxfordshire distinguished by a much stronger concentration of higher-level qualifications.

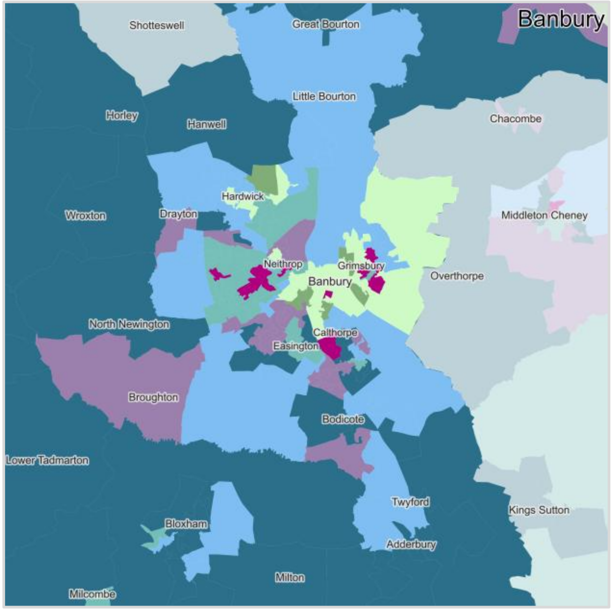
Source: Census 2021

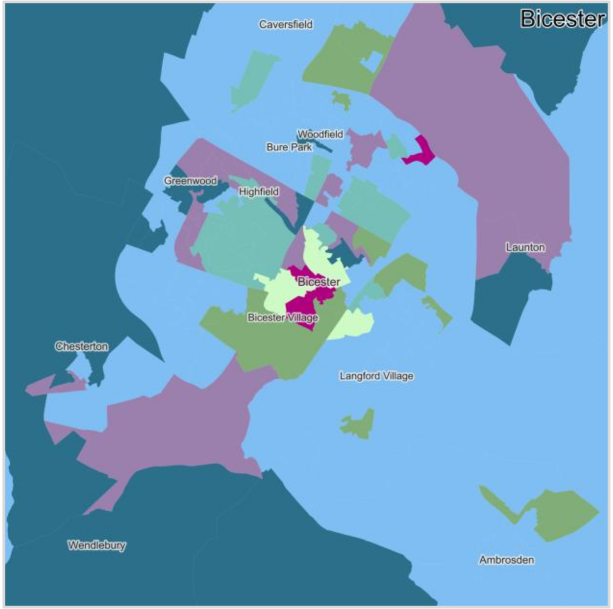
Metro——Dynamics

This means Banbury and Bicester have a distinctly different population profile to the rest of the district



There is a contrast between Banbury and Bicester and the wider rural and village areas of Cherwell. The towns have more mixed and transitional populations, with higher concentrations of Insecure Workers and Struggling Renters, alongside Growing Families and some Urban Independents in surrounding neighbourhoods.





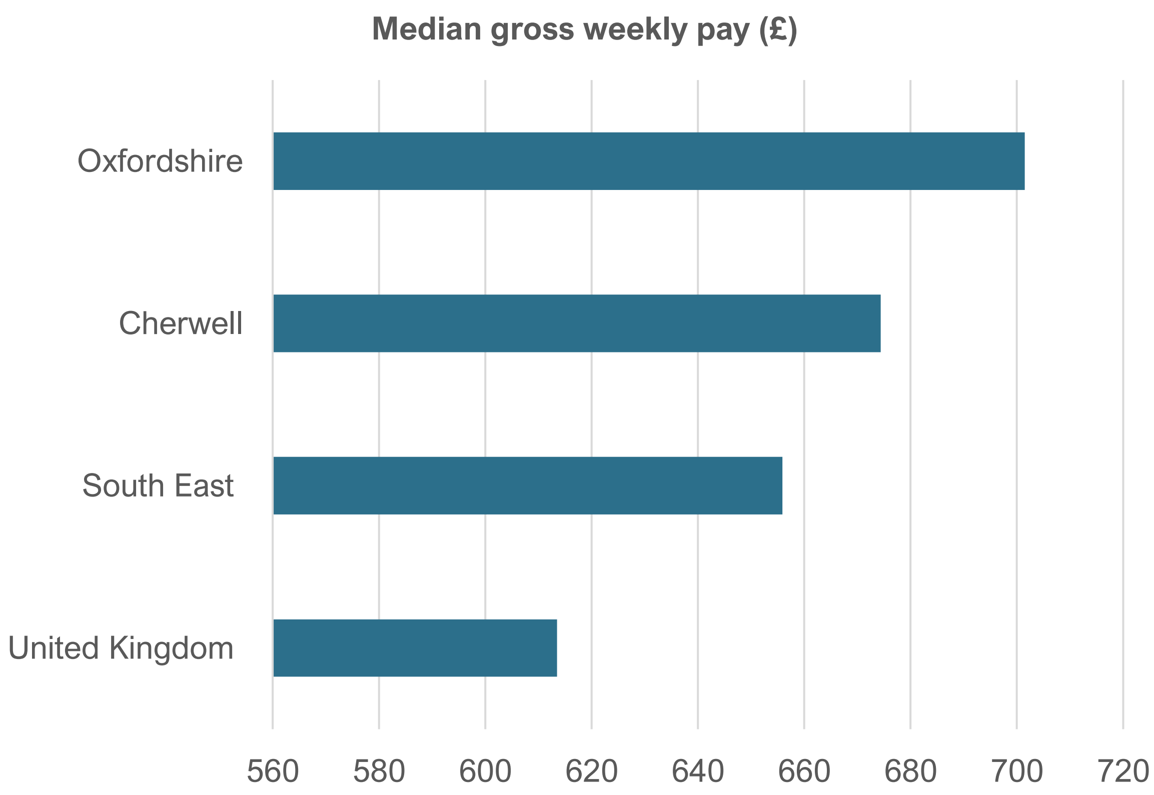
Source: Metro Dynamics analysis

Lower earnings are linked to this skills and sector mix, but still outperform national and regional averages

Median workplace earnings in Cherwell are lower than the Oxfordshire average and sit towards the lower end of the county, above West Oxfordshire but below the higher-paying districts.

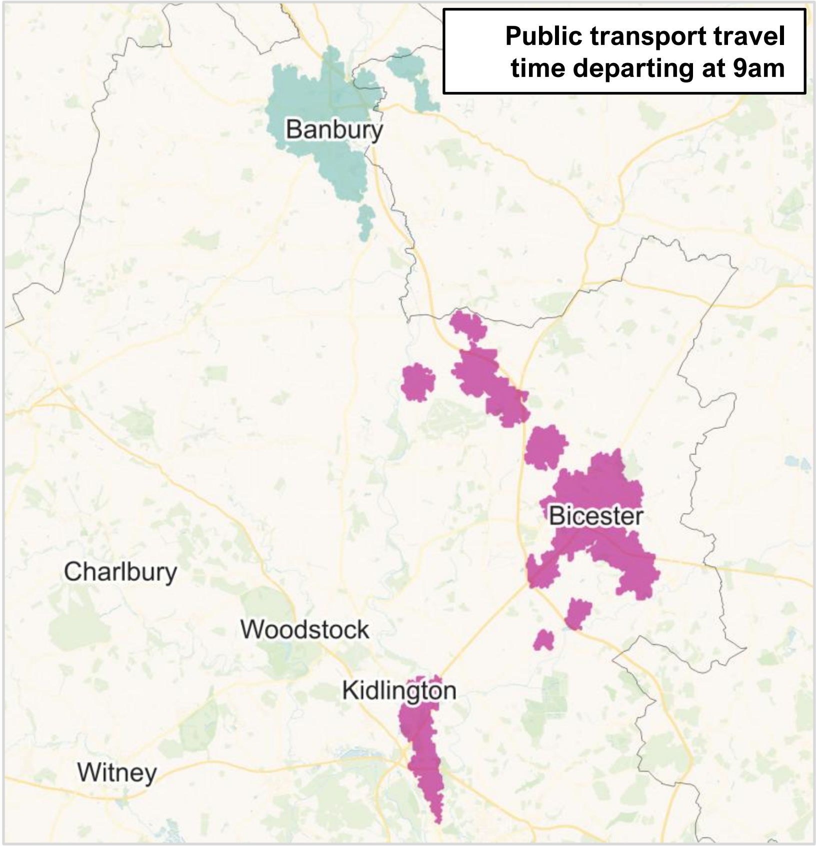
This reflects the district's skills profile and sector mix, with a greater emphasis on foundational employment and a smaller share of high-paying knowledge-intensive roles.

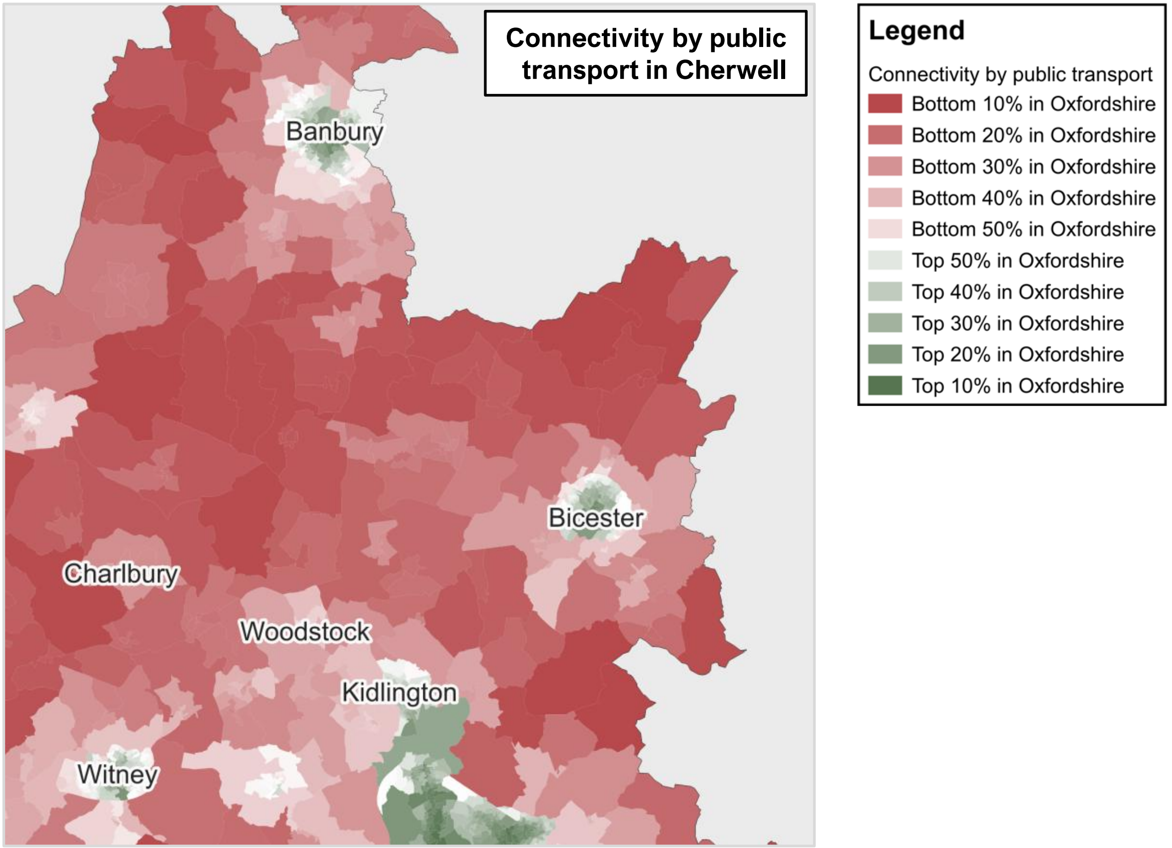
However, earnings in Cherwell remain higher than both the South East and UK averages, indicating a relatively strong labour market despite the absence of the county's highest-value concentrations.



Source: ASHE

Public transport connectivity is focused around the towns, potentially constraining access to higher-value employment

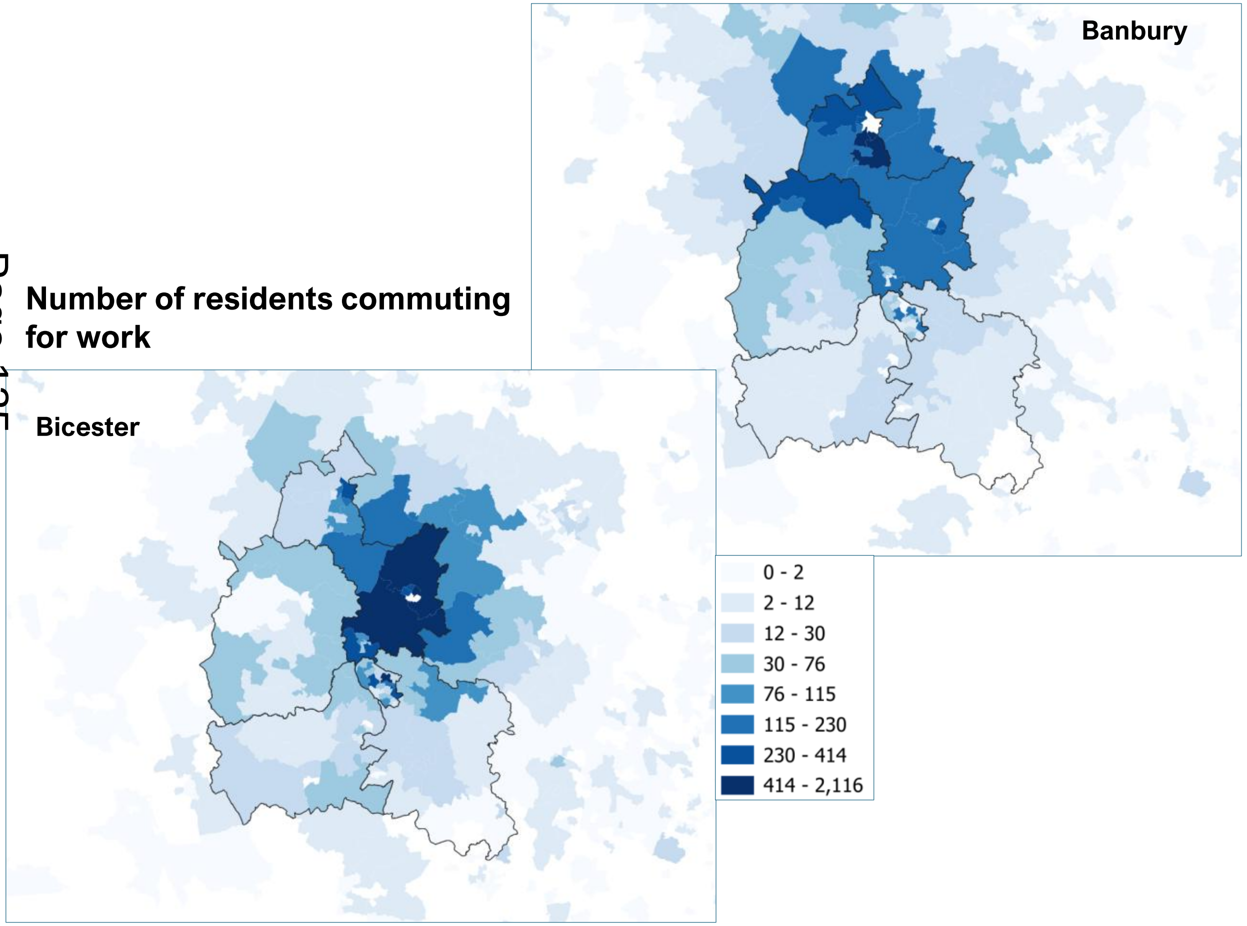




Source: Travel Time API; Metro Dynamics analysis of DfT connectivity data

Labour markets linkages point to a relatively self-contained economy, with some connection to Oxford City

Number of residents commuting for work



Banbury's commuters primarily travel within the Cherwell district, indicating that the local labor market is largely self-contained. Additionally, there are more significant employment and commuting connections extending northward toward Northamptonshire, compared to the relatively weaker links with the southern part of Oxfordshire.

In contrast, Bicester exhibits stronger economic and social ties with its nearby shopping center, drawing considerable consumer activity. Furthermore, it maintains substantial commuting flows toward Oxford City, highlighting its role as a key hub for both retail and employment opportunities in the region.

Source: Census 2021

Engagement Summary

Sector Opportunities The area is well positioned on the M40 corridor to continue benefiting from growth in logistics and light assembly. The medium-term ambition is to shift the balance towards advanced manufacturing further up the value chain, supported by a burgeoning clean tech ecosystem, the Eco-Business Centre, and an emerging Future Mobility Cluster linked to motorsport and F1 supply chains.

Visitor Economy Strong assets in Bicester Village, the F1 presence, and the incoming Puy du Fou attraction — projecting 1.5 million annual visitors — create a clear opportunity to move from a day-trip to a 1-2 night destination. Realising this requires proactive workforce planning, particularly on connectivity, where lower-wage roles are acutely sensitive to access costs, and a Hotel and Accommodation Strategy to better package the district's offer alongside Oxfordshire's wider attractions.

Housing & Growth Banbury is performing well, providing vital supply. Bicester faces infrastructure constraints limiting its ability to match growth with services and mobility. Kidlington is increasingly important as it absorbs Oxford overspill and responds to growing science park demand. Heyford Park complements this as a strategically located settlement and potential as a future labour supply hub for the science economy.

Foundational Economy There is concern about whether the foundational economy is strong enough to underpin long-term growth. Despite Bicester Village, Bicester lacks sufficient restaurants, amenities and evening-economy provision to retain workers and attract high-value employers. Enhancing the overall place offer is essential for both towns.

Spatial Area	Banbury & Bicester
Objective	Establish a new joint partnership to enhance Banbury and Bicester's future role in Oxfordshire's economy – strong housing offer, diversifying into a place for high growth clusters and 'Oxford spin outs', whilst maintaining the success of foundational sectors seen so far.

Context ⇒	Rationale ⇒	Priorities ⇒	Impacts
Banbury and Bicester feature a mixed economic base: foundational sectors are dominant, but there is also pockets of high-value activity: motorsports engineering, advanced manufacturing, clean tech Visitor economy opportunities are expanding with Puy du Fou and Bicester Motion Bicester Village is a global brand, but the wider town lacks the restaurant, leisure and evening economy infrastructure to convert day trips into evening stays and for residents Bicester's town centre and public realm lag behind its economic ambitions, reducing livability The M40 corridor (J8, J9, J10) drives large-scale employment in logistics and light assembly, forming a core part of the area's economic identity Heyford Park and Kidlington have potential to become significant growth locations linked to Oxford's housing pressures and expanding science cluster geography	**Shift to higher-value employment** Large logistics parks deliver jobs but not necessarily productive growth - there is an opportunity to rebalance land use to secure greater advanced manufacturing, clean-tech and future mobility jobs **Capture visitor economy growth** Major new attractions could expand tourism spend, but only if the area builds the hotel and leisure infrastructure required **Align housing growth with economic opportunity** Heyford Park and Kidlington are expanding, ensuring their connectivity, amenities and employment access matches growth will be critical	**Now…** Establish a comprehensive evidence base on commercial space demand to balance growing logistics requirements with opportunities in advanced engineering, clean tech and future mobility, ensuring the region attracts and supports a high-value, well-aligned mix of industry development Progress the Cherwell level Visitor Economy strategy to set objectives on visitor growth – spend / visit type – and how existing and emerging assets should be utilised **Next…** Strengthen and scale future mobility and clean-tech clusters, leaning on Bicester Motion as a key asset, by aligning them with Oxfordshire's wider high-tech innovation assets to drive integrated, high-value growth across the county Plan for and address the wider infrastructure requirements for the local community as housing growth continues. Alongside this, promote town-centre renewal in Banbury and Bicester to secure liveability and foundational economic resilience Ensure housing growth in Banbury, Bicester, Kidlington and Heyford Park is aligned with access to employment opportunities and local services. Similarly, work to ensure wider labour market integration for residents of the area into opportunities in the rest of Oxfordshire Prepare for continued growth in the visitor economy through increasing accommodation capacity and expanding the visitor economy labour supply as the area continues to attract opportunities. This should build on existing initiatives such as Puy du Fou's MoU with Active Learning. In parallel, elevate technical training and skills progression to meet the needs of engineering, high-value logistics and emerging innovation sectors. **Future…** Deepen partnerships with businesses and explore opportunities through devolved Adult Skills Fund arrangements to create a more responsive, industry-align local skills system Build a clearer economic narrative and governance approach that positions Banbury and Bicester as integral hubs for advanced engineering, high-value logistics and emerging innovation sectors, strengthening their role within Oxfordshire's innovation ecosystem while maximising their strategic economic links beyond the county's boundaries	Growth in higher-value advanced manufacturing and clean-tech employment Stronger engineering talent pipeline supporting future mobility sectors Increased visitor spending and accommodation investment A more liveable Bicester capable of retaining skilled workers and supporting new investment Improved integration between housing growth area and employment clusters Better connectivity from Heyford Park and Banbury into high-value employment areas A more balanced and resilient economy with strong hospitality and retail Clear growth narrative for Banbury and Bicester and wider Cherwell

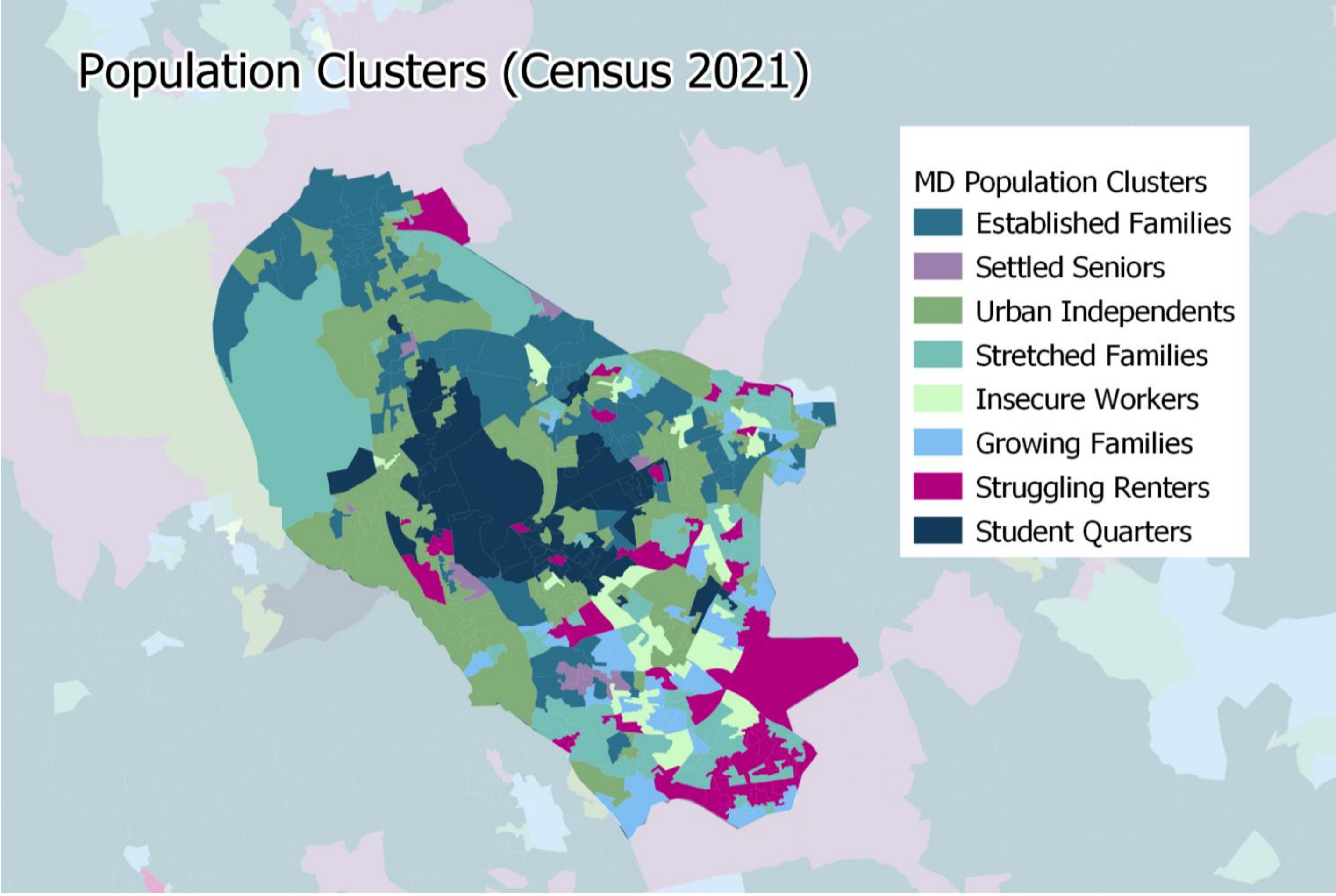
Why now?	**Banbury & Bicester have clear economic strengths, but they risk underperforming without targeted interventions to upgrade infrastructure, support advanced sectors, expand tourism, and enhance place quality.**

Oxford City

Oxford’s economy is largely driven by its two universities

Oxford hosts more than 40,000 students attending its two main institutions, the University of Oxford and Oxford Brookes, which makes up about a **quarter of the city’s population**

The central area of Oxford is predominantly occupied by students as well as young professionals, referred to here as Urban Independents, while the northern part mainly consists of homeowners and families. In contrast, within the Oxford East constituency, the neighbourhoods of Cowley, Littlemore, and Blackbird Leys **are largely inhabited by renters facing challenges and workers often employed on insecure contracts**

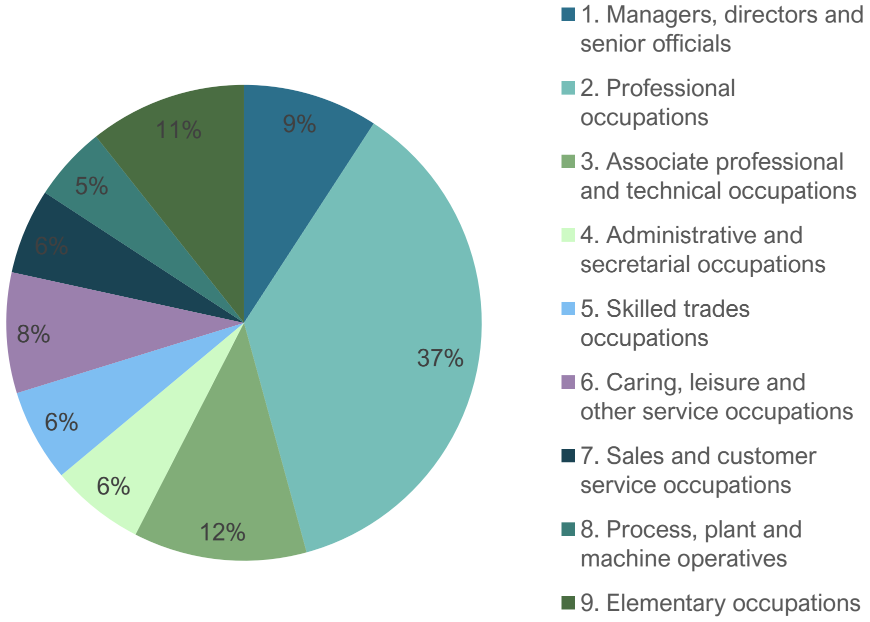


Source: Metro Dynamics analysis of Census 2021

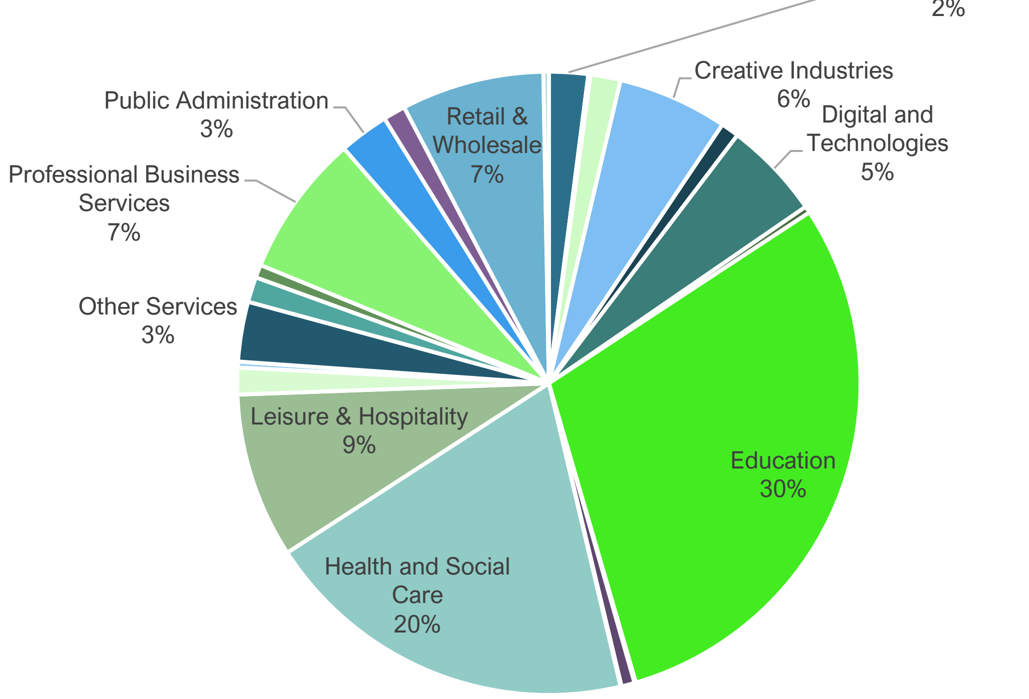
Oxford’s knowledge-intensive labour market is shaped by high concentrations of professional roles

Page 140

Oxford Occupational Profile



Sum of Employment (2023)



Source: Metro Dynamics analysis of Census 2021 and BRES 2025

Oxford's economic performance reflects strong national sector alignment with mixed local competitiveness

Oxford City's economy grew by around 3x the growth that would have been implied by national economic growth alone

The uplift beyond the national share was driven largely by sector mix rather than local competitive effects:

- Around 63% of the additional growth is explained by Oxford's sectoral composition, with the remaining 37% attributable to local factors.

This reflects the city's concentration in sectors that expanded rapidly at the national level. However, the aggregate position masks pronounced divergence across sectors:

- Very strong positive local effects in education, administrative and support services, real estate, and manufacturing. In these sectors Oxford outperformed both overall national economic growth and relevant national sector trends, indicating genuine local strength or competitive advantage.
- Large negative local effects are seen in professional, scientific and technical activities, construction, ICT and healthcare. In these sectors, Oxford performed below what would be expected given both overall national economic conditions and national sector growth, suggesting that wider constraints, particularly related to infrastructure capacity and labour market pressures, are limiting growth.

Source: Metro Dynamics analysis of Regional GVA, 2025

Oxford's economy is undergoing a structural shift toward life sciences and digital industries, reshaping future growth drivers

Professional business services sectors such as law, consulting, and accounting are experiencing a **decline**

In contrast, **digital and life sciences are growing rapidly.** Life sciences growth is rooted in Oxford University's world-leading research base, with a strong pipeline of spin-out companies, supported by close proximity to the John Radcliffe and the wider trust.

Digital similarly draws on the research ecosystem, with the city particularly strong in deep tech sectors such as AI, computational biology, future computing, and robotics, and benefiting from the same skilled graduate pool.

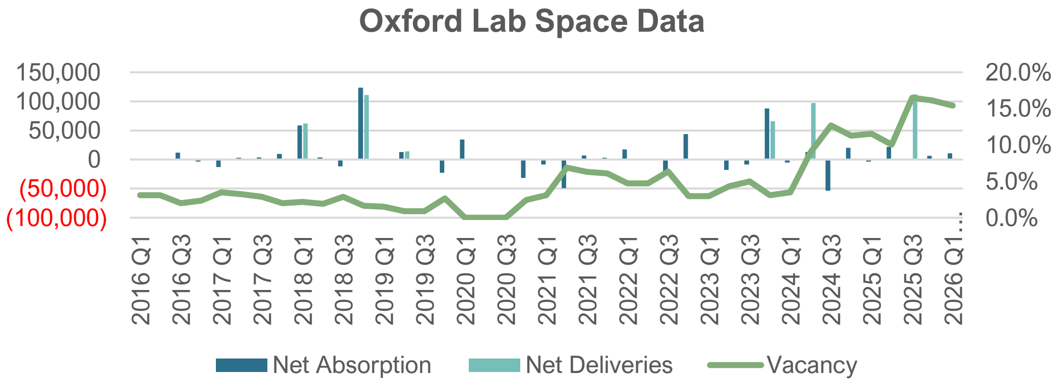
This trend is supported by recent research from the Centre for Cities, which identified **Oxford as having the 6th highest proportion of IS8 firms per 10,000 working-age residents among all UK local authorities**

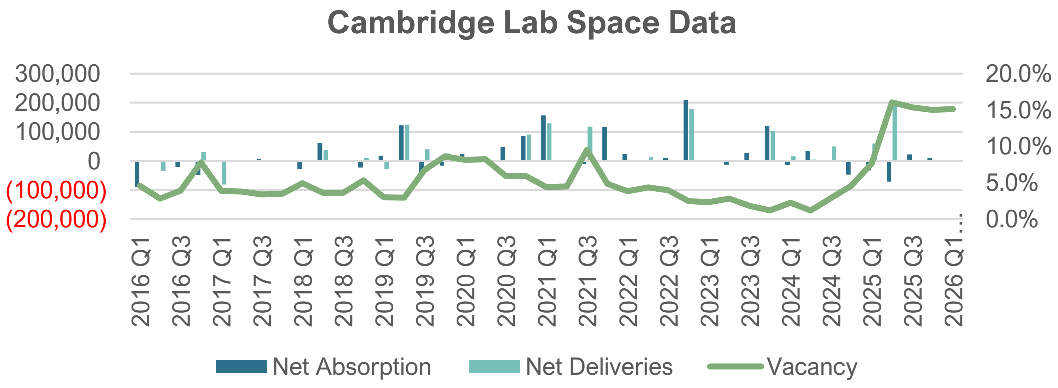
Sector grouping	Sum of Emp_23	Emp_CAGR	Sum of Bus_23	Bus_CAGR	Sum of GVA_23	GVA_CAGR	Productivity_23	Prod_CAGR	Avg_con_23	Avg_con_change
Education	37980	1.7%	215	1.5%	£2,615	7.5%	£68,842	5.7%	3.1	3.0%
Health and Social Care	24965	3.6%	350	1.2%	£1,081	-3.3%	£43,301	-6.6%	1.6	5.5%
Leisure & Hospitality	10940	4.2%	485	2.0%	£313	1.6%	£28,570	-2.5%	1.0	1.3%
Retail & Wholesale	9455	-3.8%	555	1.3%	£368	-0.4%	£38,895	3.6%	0.7	-6.1%
Professional Business Services	9430	-2.3%	1010	-0.5%	£425	-5.0%	£45,031	-2.7%	0.9	-3.8%
Creative Industries	7285	11.8%	265	-0.7%	£317	-1.1%	£43,515	-11.5%	2.6	33.4%
Digital and Technologies	6475	7.9%	540	-1.9%	£238	5.9%	£36,681	-1.9%	1.1	21.4%
Other Services	3960	-3.1%	355	3.8%	£137	3.7%	£34,576	7.1%	0.9	-2.8%
Public Administration	3290	3.1%	5	0.0%	£348	3.8%	£105,775	0.6%	0.5	-2.6%
Advanced Manufacturing	2585	-9.5%	5	0.0%	£527	-1.4%	£203,945	9.0%	0.8	-30.9%
Construction	1990	-20.2%	345	-1.7%	£143	-13.8%	£71,859	8.1%	0.4	-50.7%
Life Sciences	1770	20.9%	70	11.8%	£157	11.3%	£88,932	-7.9%	7.1	62.4%
Other Transport activities	1670	-0.9%	60	8.4%	£51	-4.1%	£30,413	-3.3%	0.5	3.3%
Real Estate	1475	0.9%	235	8.0%	£794	2.4%	£538,305	1.5%	0.9	11.0%
Digital and Creative	1195	-2.0%	150	2.9%	£51	-12.3%	£42,978	-10.5%	1.3	-5.2%
Financial Services	875	-1.3%	70	1.5%	£40	-2.8%	£45,714	-1.5%	0.4	0.6%
Ports and Logistics	860	-5.1%	25	-6.5%	£27	-8.1%	£31,906	-3.1%	0.3	-31.2%
Digital Manufacturing	440	23.2%	10	14.9%	£88	35.0%	£200,997	9.6%	1.0	139.2%
Manufacturing	390	3.4%	30	-3.0%	£32	-4.1%	£83,008	-7.2%	0.2	-5.1%
Utilities	360	-5.4%	5	0.0%	£81	9.7%	£225,670	15.9%	0.3	-24.6%
Agri-Food	110	5.3%	5	0.0%	£8	26.6%	£68,571	20.3%	0.2	-13.8%
Farming	90	-9.1%	15	-12.9%	£11	12.9%	£122,222	24.2%	0.1	-43.5%
Fossil Fuels	65	13.2%	0	0.0%	£4	31.2%	£60,149	16.0%	0.1	113.6%
Clean Energy	40	-25.1%	10	0.0%	£10	-12.5%	£257,143	16.9%	0.5	-23.7%

Source: Metro Dynamics analysis of BRES and Regional GVA

The Oxford Economic Strategy cites three key constraints that will limit the growth in these sectors of comparative advantage

Page 143





Oxford is a structurally undersupplied lab market. Its history of ultra-low vacancy, limited development pipeline, and immediate rebound in absorption when supply comes online demonstrates a persistent imbalance between demand and deliverable space

Cambridge, while still exhibiting strong lab space demand, has a more flexible and dynamic supply pipeline. Developers in Cambridge respond more rapidly to demand signals, resulting in a market with greater delivery volumes and cyclical vacancy patterns

Regular office space in Oxford is also structurally tight (3-4% vacancy), with a looser environment over last year (9% vacancy). Volatility in absorption is driven by lumpy spikes in development, followed by a sharp readjustment as tenants flight to quality space

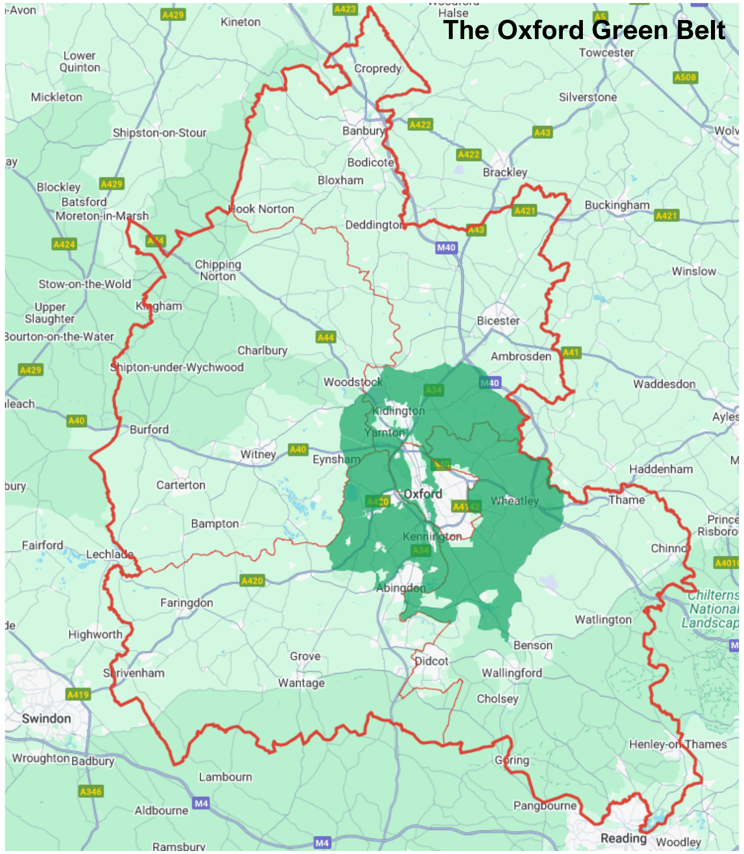
Source: Metro Dynamics analysis of CoStar Data, 2025

Oxford's severe housing affordability gaps are limiting access to opportunity and exacerbating inequalities across the city

The average home price is about 12.5x the average annual salary, making it the least affordable city in the country. Housing supply has remained limited, with a widening gap between targets and actual completions since the changes to the NPPF

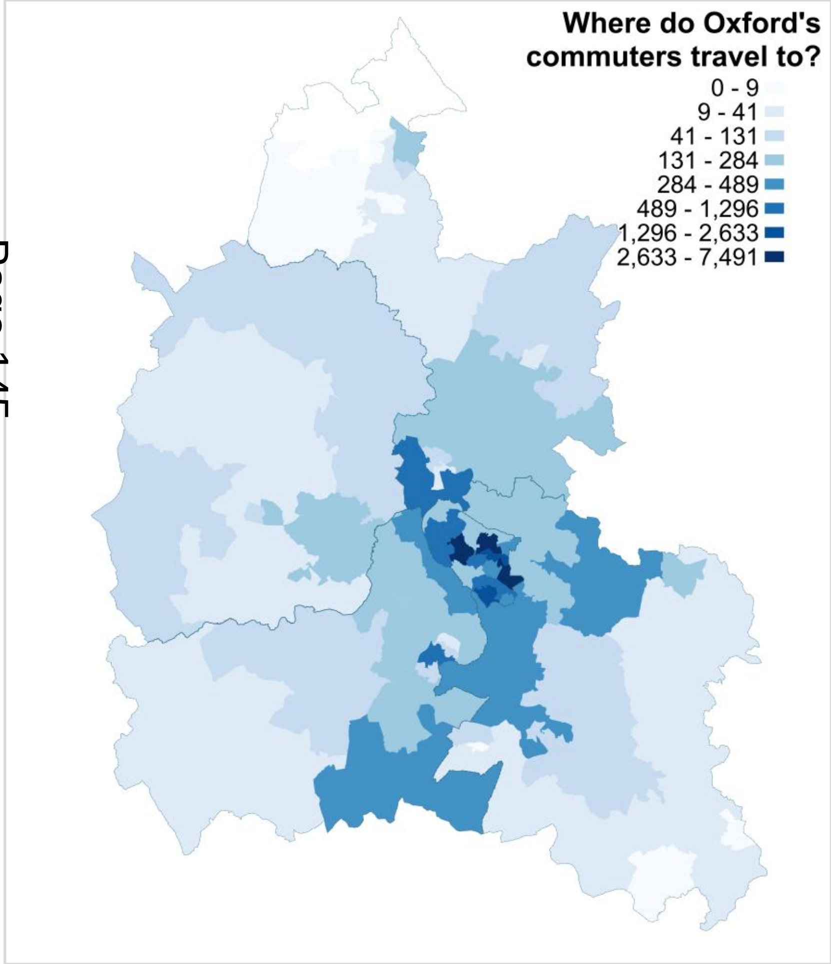
Page 144

Moreover, Oxford faces development obstacles due to rising construction costs and borrowing rates, along with restrictions from **the surrounding Green Belt designed to prevent urban sprawl**. This situation puts **additional pressure on the city to make efficient use of its strategic sites** and carefully develop grey belt land, highlighting the importance of Oxfordshire functioning as an interconnected polycentric economy in terms of transport and the labour market.



Source: Centre for Cities Outlook 2026, CPRE

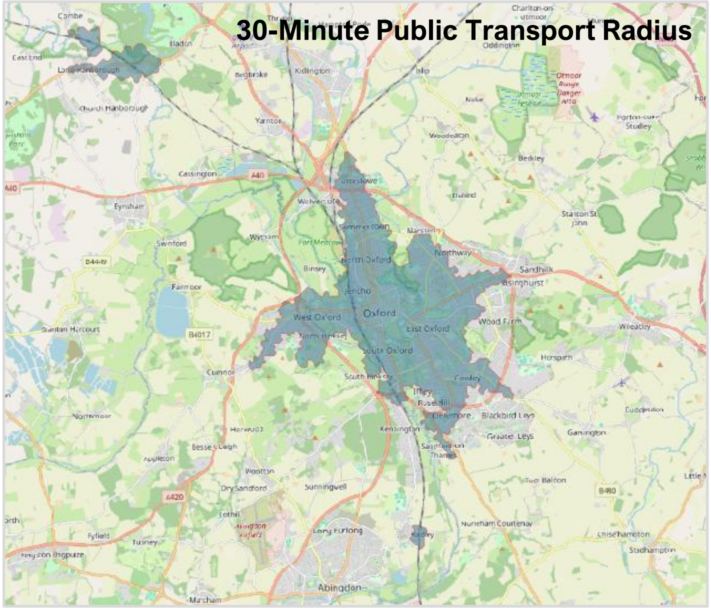
Oxford’s transport network does not sufficiently support equitable access to key employment centres



The **Oxford city labour force is predominately self contained to the city**, but with some commuting to Science Vale. There are limited labour market connections with West Oxfordshire and Cherwell

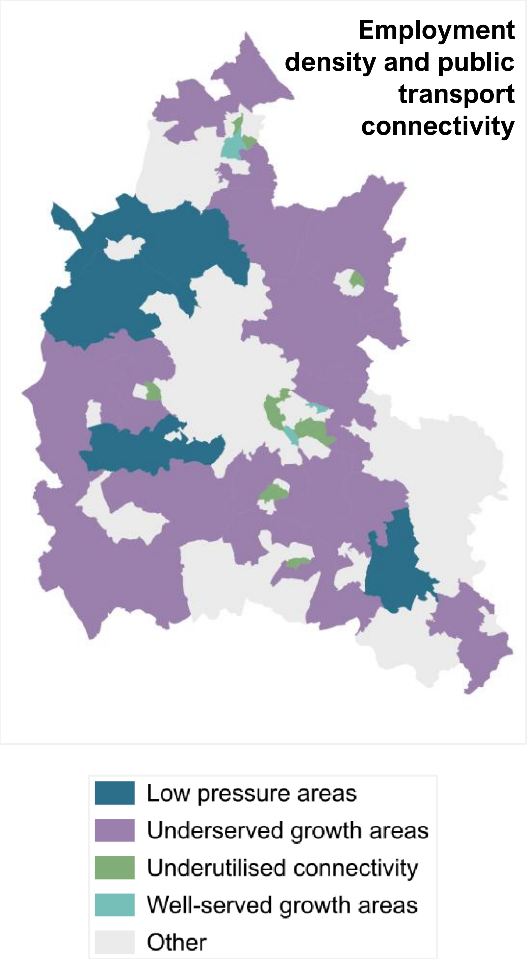
Public **transport connections between Oxford City and key Oxfordshire employment hubs are lengthy**, increasing the attractiveness of car travel

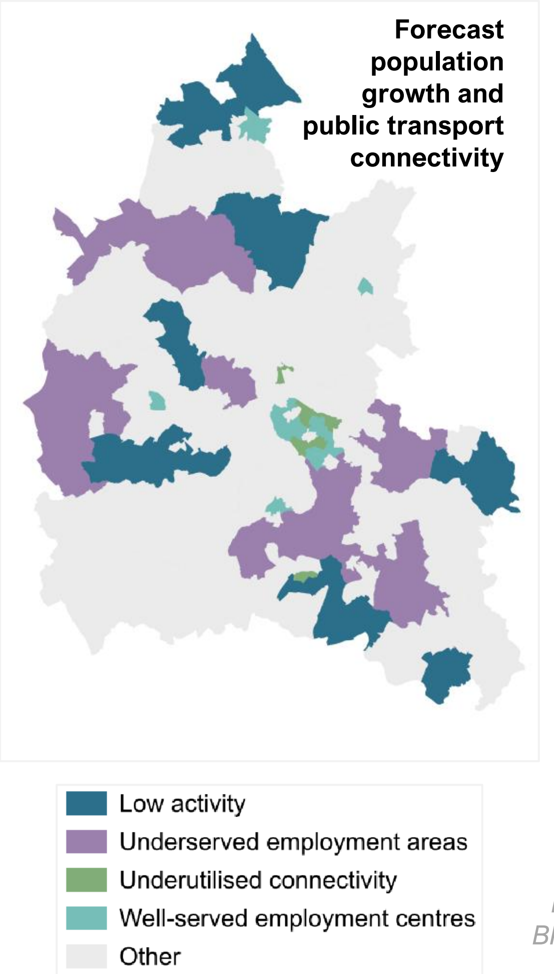
Oxford’s medieval street network has narrow streets and limited road space, creating persistent bottlenecks and **conflicts between buses, delivery vehicles, cars, pedestrians and cyclists**



Source: Oxford Economic Strategy, Oxford Transport Strategy, Travel Times API, Census 2021

That said, Oxford remains the best-connected part of a county where transport and growth are currently misaligned





Oxford contains the neighbourhoods with the county's highest employment densities and its strongest public transport connectivity.

Across the wider county, that relationship is less strong – areas forecast for significant population growth by 2032 are frequently among the least well-connected, with employment concentrations outside Oxford often in areas poorly served by public transport.

Type	Connectivity	Employment density / forecast growth
Well-served areas	High	High
Underserved areas	Low	High
Underutilised connectivity	High	Low
Low activity / Low pressure	Low	Low
Unclassified	Medium on either variable	

Note: MSOA-level analysis. Connectivity: DfT Public Transport Connectivity Score. Employment: BRES workplace employment density (2023). Population growth: OCC forecasts 2023-2032. Each variable classified into thirds; middle third unclassified:

Three key developments will address supply side market failures: West End, North and Cowley Branch Line

Project	Oxford West End	Oxford North	Cowley Branch Line Reopening
Description	Oxford West End is a major regen programme transforming an under-used central area into a mixed-use, highly accessible innovation and residential district	Oxford North is a £1.2bn, 64-acre, global innovation district on the northern edge of Oxford. It is to be designed as major hubs for science, technology, AI, biotech and research commercialisation, proving lab space, homes and public realm	Reinstatement project reconnecting Cowley and Littlemore to the national rail network for the first time since 1963. It introduces new stations (Oxford Cowley and Oxford Littlemore) and integrates four of Oxford's growth areas in a single link
Key facts	• Largest civic space in Oxford City created at Oxpens, with new public, cultural and green spaces across the district • New affordable housing in the city centre • High-quality SME workspaces • Improvements to active travel	• 1m sq fit of flexible labs and offices supporting start-ups through to global firms • 480 new homes and three new public parks • Positioned within the Ox-Cam-London 'Golden Triangle' improving national and international scientific connectivity	• Journey times: 10 minutes from Cowley/Littlemore to city centre • Direct connectivity to London Marylebone • New stations serve key employment clusters including ARC Oxford. Oxford Science Park and the Ellison Institute of Technology
Economic benefits	• New construction jobs, plus long-term employment in high-value industries • Additional annual spend from workers and residents once completed • Inclusive economy measures such as local sourcing and apprenticeships	• Expected to create 4,500+ jobs and inject £150m per year into economy • Strengthens the UK's life sciences, AI and technology sectors by providing much-needed high-spec lab space • Catalyst for spin-outs, venture creation and R&D investment	• Unlocks 10,000 new jobs and enables potential development of 5,000-10,000 additional homes • Supports over £1bn private-sector investment, including the Ellison Institute • Expected to generate over 1 million journeys within first three years, reducing congestion and supporting mobility

Page 147

Sources: Vision, Oxford West End, About, Oxford North, Cowley Branch Line to be reopened with two new stations for Oxford, Oxfordshire County Council, 2025

Inequality in Oxford is highly spatial and concentrated due to education and income barriers

LSOA	IMD	Income	Employ ment	Education	Health	Crime	Housing	Environ-ment
Barton & Sandhills	2	2	3	1	3	4	5	6
Osney & St Thomas	2	5	4	3	3	1	2	1
Littlemore	2	2	3	2	3	3	2	6
Northfield Brook 17D	2	3	3	2	3	3	1	4
Northfield Brook 18B	1	2	2	1	2	2	2	8
Northfield Brook 18C	2	2	2	1	2	2	5	9
Rose Hill & Iffley 16E	2	2	2	1	2	2	4	4

Deprivation in Oxford is geographically concentrated, with the most affected neighbourhoods located predominantly in the south of the city (Oxford East parliamentary constituency), including areas such as Blackbird Leys, Littlemore, and Rose Hill

According to the Indices of Multiple Deprivation (IMD), the primary drivers of deprivation in these southern communities are income and skills deprivation, rather than housing or access to services

In the rest of Oxford, where qualification levels are high and employment outcomes strong, housing costs act as the main constraint on quality of life, limiting disposable income and worsening overall living standards even among highly educated residents

Sources: Oxfordshire's 10 most deprived wards, JSNA Bitesize, 2023

Engagement Summary

Skills & Aspiration. A core challenge is aspiration, with many residents not seeing Oxford's high-value economy as accessible to them. This is compounded by a skills pipeline skewed towards adults, leaving a gap in early intervention in schools. Short-termism in funding cycles limits long-term impact, with a need to better link VCSEs, health, skills and employment.

Productivity, Innovation & Agglomeration. Despite world-class innovation assets, Oxford has not yet been able to agglomerate to the level its fundamentals suggest. The barriers are structural. Planned infrastructure upgrades are welcome but risk short-term disruption before benefits are felt.

Strategic Planning & Investment Tools. Oxford needs, and is developing, a spatial approach with an investor focus. There is an opportunity to align this with the Oxford West End opportunity area and its proposed TIF model, as well as making better use of the Enterprise Zone lever.

Infrastructure & Place-Shaping. Utility and space constraints remain a significant barrier to development. More can be done to continue the shift towards mixed-use typologies, though a clearer evaluation of what has not worked historically is needed before committing to new interventions.

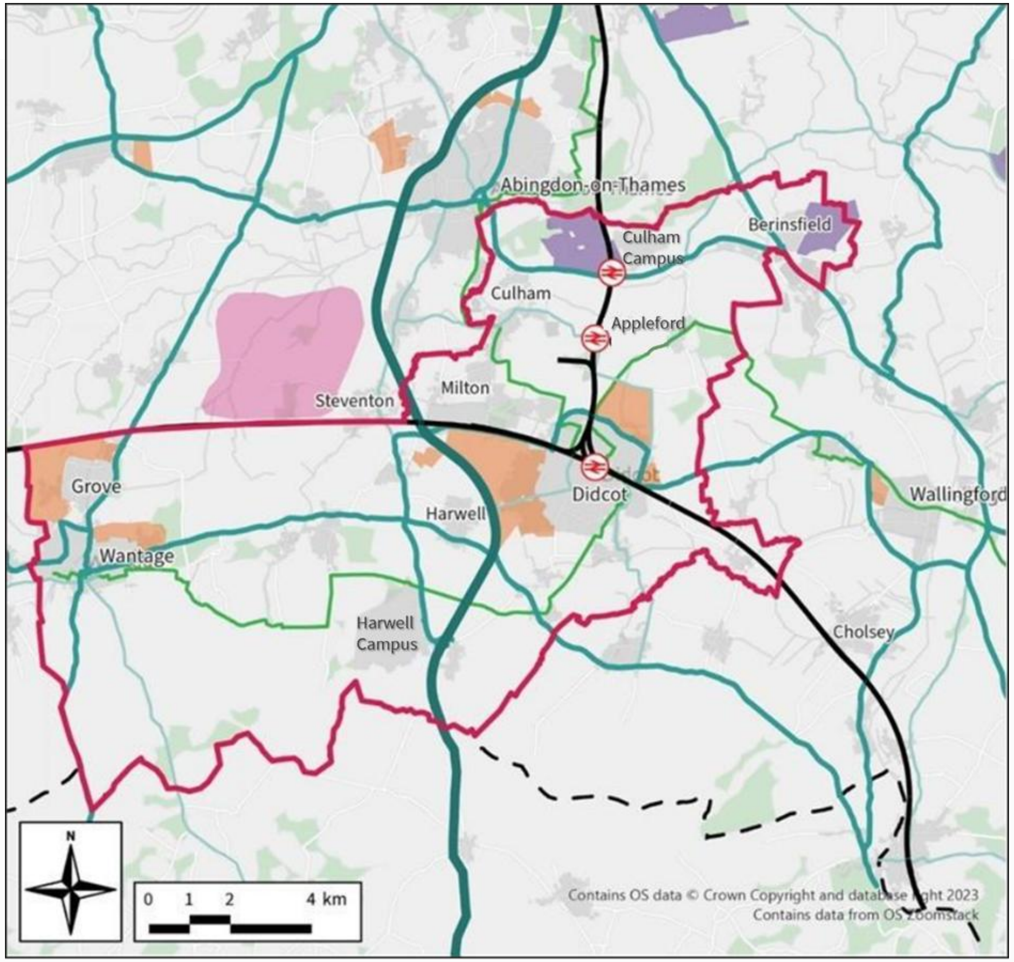
Spatial Area	Oxford		
Objective	*To support a more productive and inclusive Oxford by improving space, mobility and skills around the city's core economic assets*		
Context ⇒	**Rationale ⇒**	**Priorities ⇒**	**Impacts**
Oxford's economy is anchored in high value knowledge sectors, with the city's growth outperforming national trends largely due to favourable sector composition The city is home to over 40,000 students and a highly skilled workforce, concentrated in professional and scientific roles typically linked or because of the universities Oxford is severely supply-constrained in both housing and commercial floorspace Transport connectivity creates frictions – internal bottlenecks alongside poor cross-county linkages via public transport Oxford is geographically unequal, with deprivation concentrated in the south, driven by low skills and low incomes	**Aligning economic assets with spatial capacity** Oxford's innovation economy is expanding, but commercial space and housing are not keeping pace, constraining scale-ups and inward investment Unlike comparable cities, Oxford has not agglomerated effectively, partly due to poor digital infrastructure, fragmented SME space, and transport constraints **Addressing entrenched inequality** Economic opportunity is not spatially inclusive; deprived areas see low skills, limited labour mobility and poor access to career pathways. Without intervention, Oxford risks deepening attainment and aspiration divides **Capitalising on major developments** Oxford West End, Oxford North, and the Cowley Branch Line reopening create an opportunity to reshape the city's housing, mobility and innovation ecosystem	**Now..** Align Oxford's Spatial Development Strategy with the needs of its core sector ecosystems, particularly life sciences and digital, so that land use, development and investment decisions are shaped by how clusters grow and operate in practice, giving investors clarity on the types of space required and enabling EquinOx to promote Oxford through a coherent, sector-led growth narrative Agree delivery recommendations and mechanisms to accelerate housing development with the Oxford Growth Commission. Develop a strong, evidence-led case for unlocking housing growth, grounded in economic rationale, infrastructure needs and community priorities, to position Oxford for future funding opportunities, including through devolution Accelerate the transport, digital and energy infrastructure schemes for Oxford City identified in the Oxfordshire Infrastructure Strategy, ensuring that that schemes are supported by a clear rationale linked to the wider economic narrative Develop a hyper-local Inclusive Growth Strategy for the deprived areas around the South/East of Oxford City, focused on improving life chances through better health, employment and skills, while galvanising a broad cross-organisation coalition to drive collective action **Next..** Sustain clear Government engagement to secure a TIF mechanism for Oxford West End, backed by a strong concept of investment intentions and the benefits it will deliver Ensure transport planning for an integrated public transport system recognises Oxford's central role in Oxfordshire's wider economic geography Make the case for the South/East of Oxford City to become a Place-Based Pilot, enabling pooled public services to tackle the city's most concentrated pockets of deprivation **Future…** Ensure new commercial space is connected into emerging business-support offers that strengthen county-wide sector networks and supply-chain linkages, enabling SMEs to collaborate, access markets and scale across Oxfordshire Explore devolved transport arrangements that could speed up delivery, strengthen agglomeration effects, and boost dynamism across the city Assess how devolved skills levers, such as Adult Skills Fund, could be used to advance place-based priorities and improve outcomes for local communities	Increased productivity through better job-workspace proximity and stronger SME clustering Greater inward investment flow and higher retention of start-ups and scale-ups More commercial space reaching the market, reducing constraints on high-value sectors Higher skills attainment and aspiration in deprived areas Reduce spatial inequality within Oxford, especially between south Oxford and rest Improved health, employment and progression outcomes due to integrated interventions More balanced housing delivery aligned with economic geography Better public transport access to major employment clusters More resilient digital and infrastructure systems supporting agglomeration
Why now?	***Oxford's economic strengths are globally significant, but are increasingly constrained by structural barriers. Without coordinated intervention, the city risks hitting a growth ceiling, with implications for the wider county***		

Science Vale

What is Science Vale?

Science Vale covers South Oxfordshire and the Vale of White Horse, with major settlements in Wantage, Didcot, and Milton. It is principally characterised by the density and connectivity of key employment locations – Culham Campus, Milton Park, and Harwell, as well as presence of two Enterprise Zones.

Science Vale has an established boundary definition used across a range of strategic frameworks for the area (shown in the map on this page). Our analysis broadly reflects this boundary, but takes an expansive view of the functional economic area – recognising, for example, that Abingdon sit just outside the defined boundary yet is integral to the area's labour market and wider economic geography.



Source (right): Science Vale Movement and Place Plan

A large portfolio of developments and assets support good growth opportunities

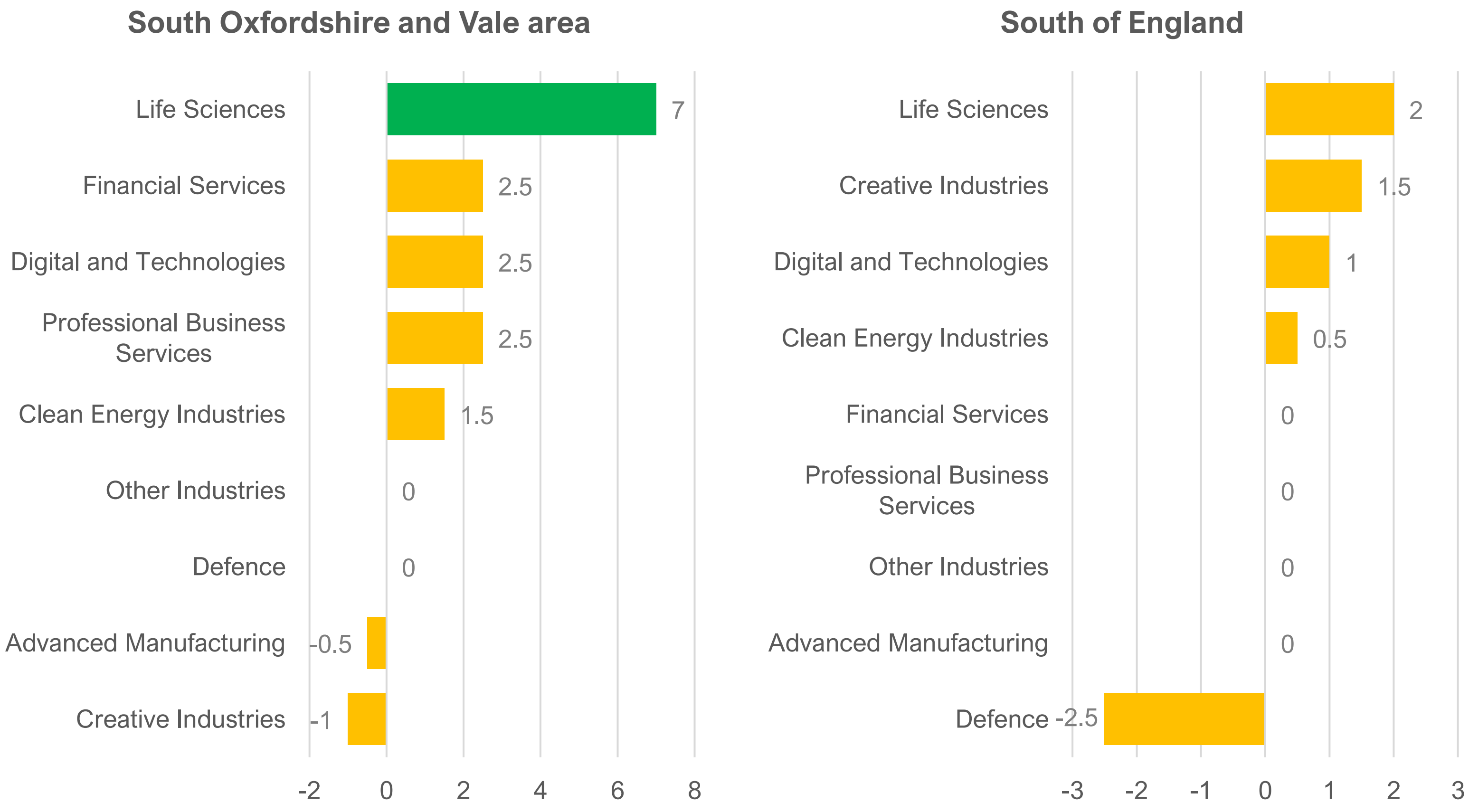
Existing assets (among others)

- **Campuses and business parks.** Science Vale hosts nationally significant innovation assets at Harwell, Culham and Milton Park, alongside a wider portfolio of employment land.
- **Enterprise Zones.** Science Vale UK (Harwell Campus and Milton Park) and the Didcot Growth Accelerator (Milton Park and north of Didcot) allow retention and reinvestment of business rates growth until 2038 and 2041 respectively.
- **Strategic connectivity.** Didcot Parkway provides strong rail connectivity, complemented by links along the A34 and A4130.
- **Skills**. UTC Oxfordshire, based in Didcot, provides specialist technical education for 14-19 year olds, offering a pipeline of STEM-skilled young people directly within the area.
- **High-quality natural environment.** The area sits between the Chilterns and North Wessex Downs National Landscapes, offering a strong nature, recreation and quality-of-life asset.

Major projects in the pipeline (among others)

- **Major urban expansion at Didcot and Culham.** Large-scale housing and employment growth is planned through Didcot Garden Town and the Culham strategic allocation, supporting long-term population and jobs growth.
- **Campus expansion at Harwell and Milton Park.** Significant new laboratory, office and advanced manufacturing space is planned to support continued growth of the science and innovation economy.
- **Oxford Metro opportunity.** Proposed improvements to local rail services and connectivity have the potential to strengthen access between Science Vale, Oxford and the wider county.
- **Road upgrades and new bridges.** The HIF-funded package includes major road improvements, new bridges and river crossings to unlock development and improve movement across the area.

High-value sectors are leading growth across South Oxfordshire and Vale



Page 154

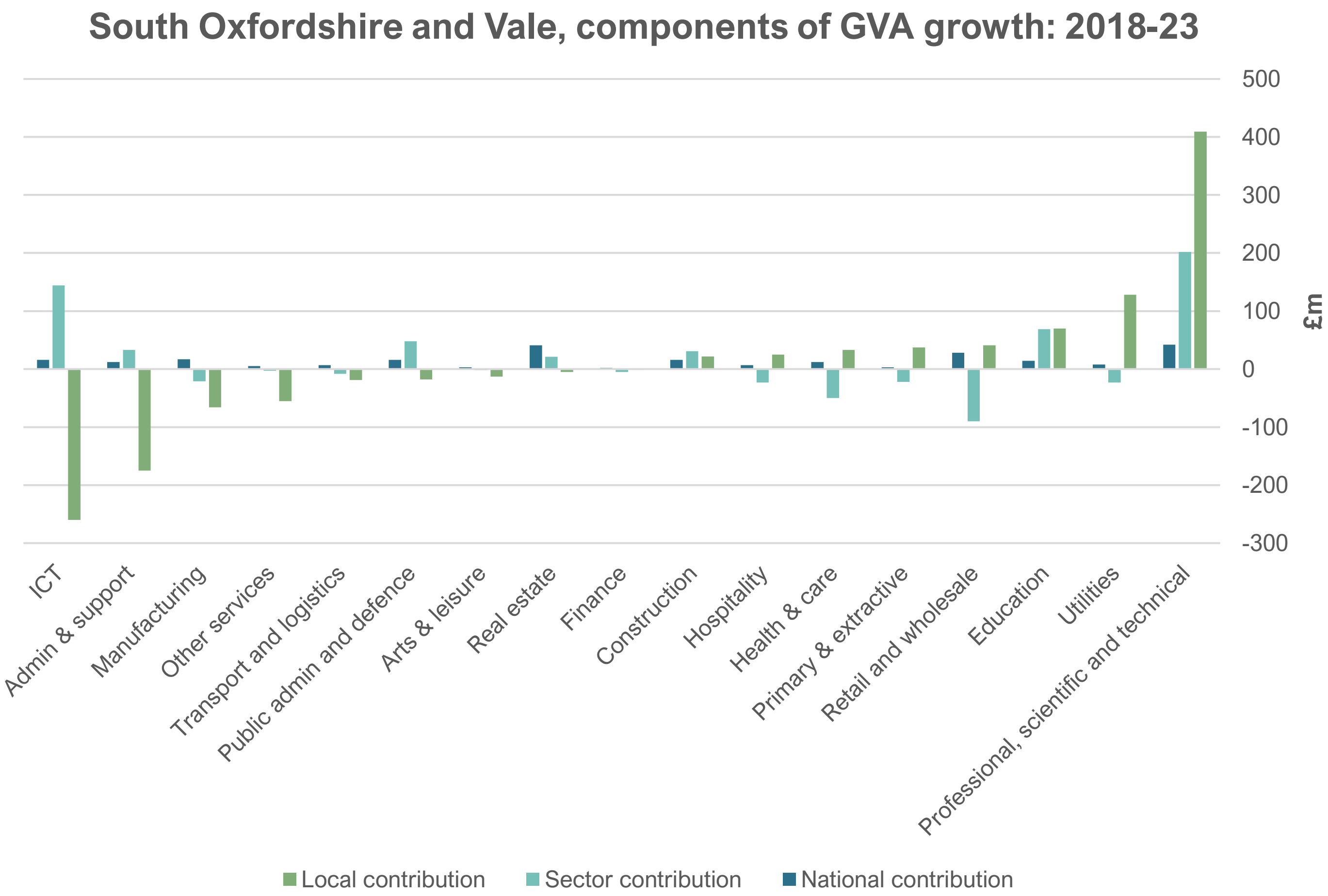
The Metro Dynamics Sector Growth Index combines performance across **employment, businesses, GVA and productivity** between 2018-23, benchmarked against national trends (7 = strongest possible growth).

At a district level, growth in South Oxfordshire and Vale is being **driven by high-value sectors.**

These sectors are **growing faster and at greater scale** than in the wider South of England, while ‘other industries’ remain broadly flat.

Source: Metro Dynamics analysis

Local factors are contributing significantly to this strong sectoral growth



Growth in South Oxfordshire and Vale reflects a combination of high-performing sectors and strong local competitive effects.

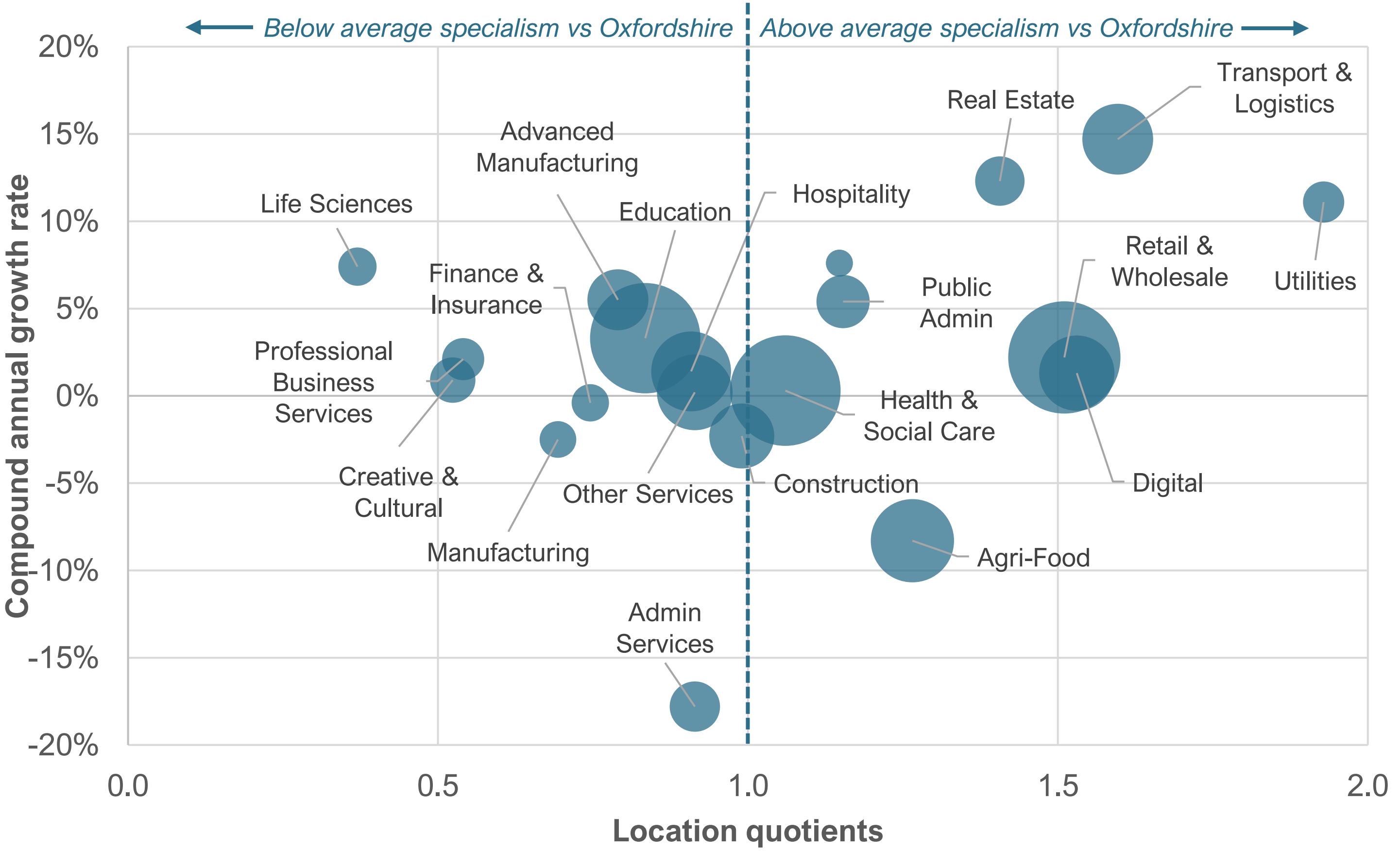
Sector contributions indicate a high concentration of activities that have grown quickly at the national level, while positive local effects point to place-specific advantages such as the depth of the science and innovation ecosystem, institutional presence, and business networks.

Professional, scientific and technical services stands out, with local contributions substantially exceeding both national and sector trends, reinforcing the area's role as a core driver of the county's science-led economy.

Source: Metro Dynamics analysis of Sub-Regional GVA, ONS

Abingdon and Didcot are also growing, but driven by more foundational sectors

Abingdon and Didcot* sector profiles (bubble size = no. of employees)



Top right: **Transport and logistics** is Abingdon and Didcot's clearest growth area, combining high specialisation compared to Oxfordshire and rapid growth.

Top left: High value activities such as **life sciences** and **advanced manufacturing** are growing quickly from a low base.

Bottom right: **Agri-food** is specialised but contracting.

Near the x-axis: Many of Abingdon and Didcot's sectors show moderate growth, including **digital and retail**, local specialisms.

Retail, **health**, and **hospitality** are one third of employment, underlining the towns' supporting role.

Source: Metro Dynamics analysis of BRES

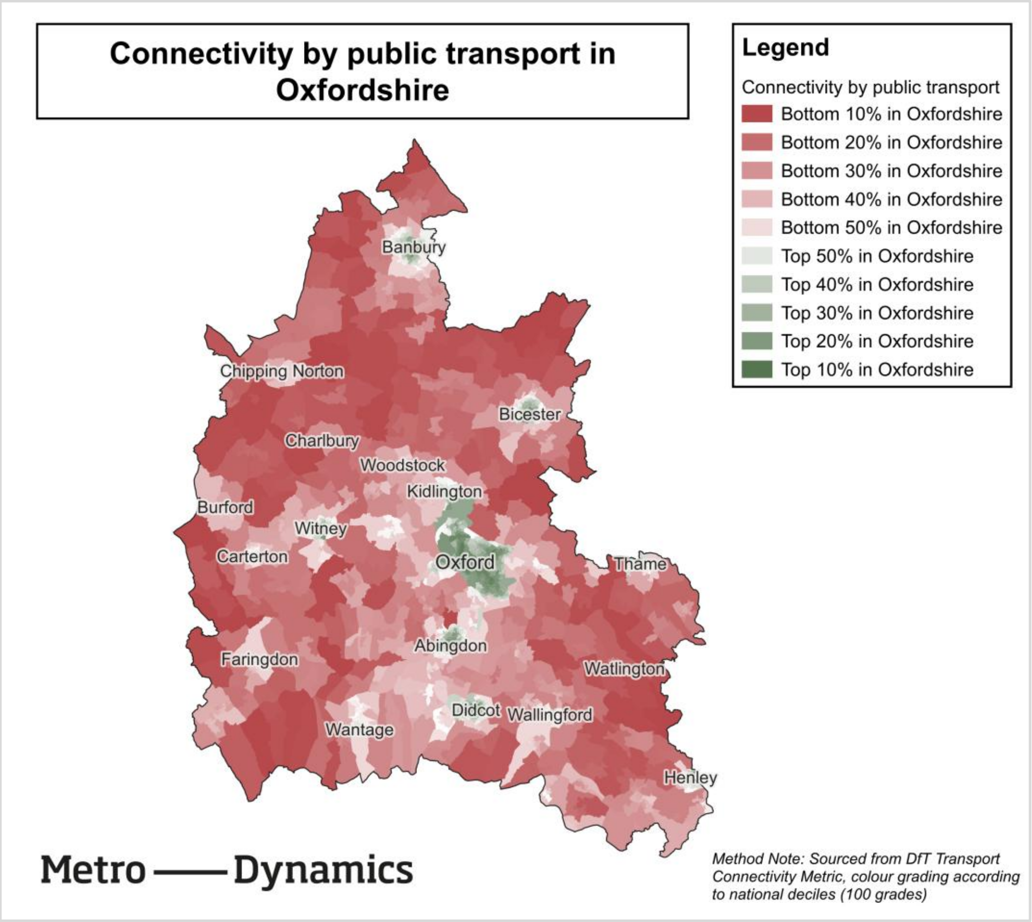
** Custom definitions using best-fit MSOAs on built-up town areas*

Limited public transport access can constrain who can reach growth opportunities

Harwell, Culham and Milton Park act as major magnets, but access is highly car-dependent. Limited sustainable transport options restrict who can realistically access jobs.

For example, timely public transport access to Harwell Campus is largely confined to corridors along the A417 and A4130, limiting access from surrounding towns and rural areas.

Page 157



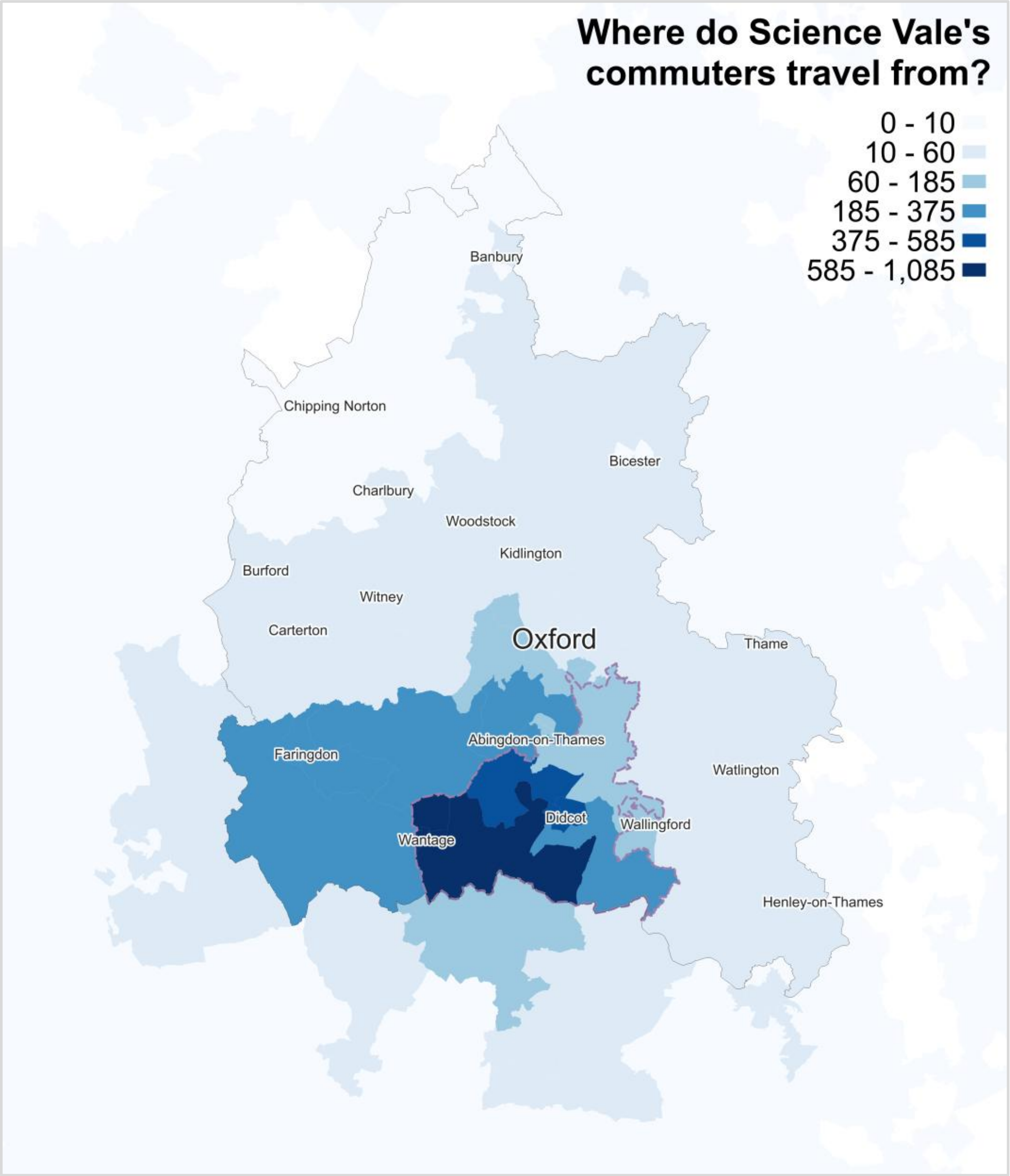
Source: DfT and Travel Time API

Science Vale's workforce is relatively self contained

Science Vale's workforce is drawn predominantly from within the Science Vale area itself, with commuting patterns showing a largely localised labour market rather than extensive long-distance inflows.

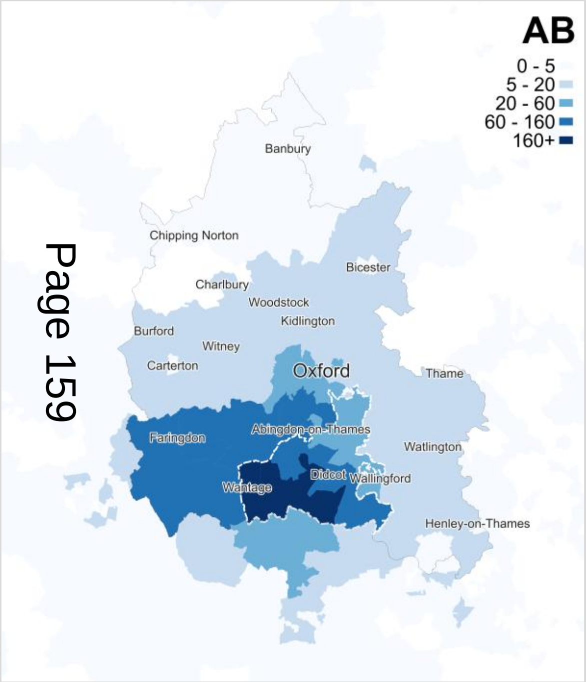
There are comparatively smaller commuting flows from Oxford and from outside the immediate sub-region.

These patterns should be interpreted with some caution, as Census 2021 commuting data was affected by pandemic-related home-working, which is likely to understate longer-distance commuting.

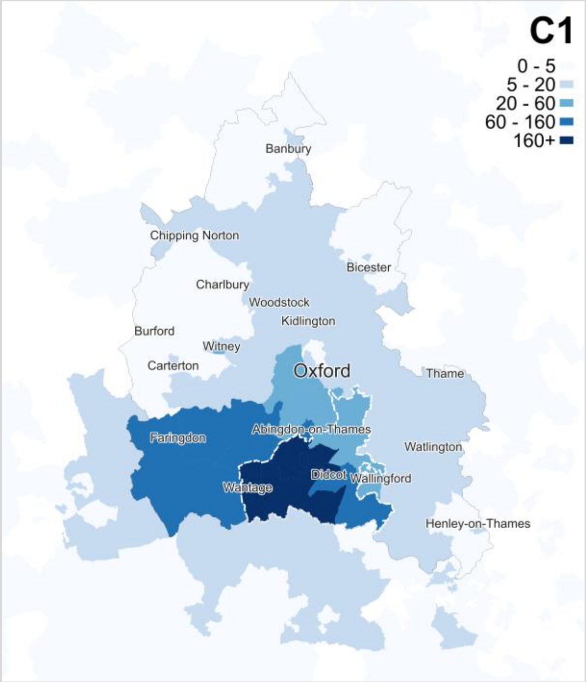


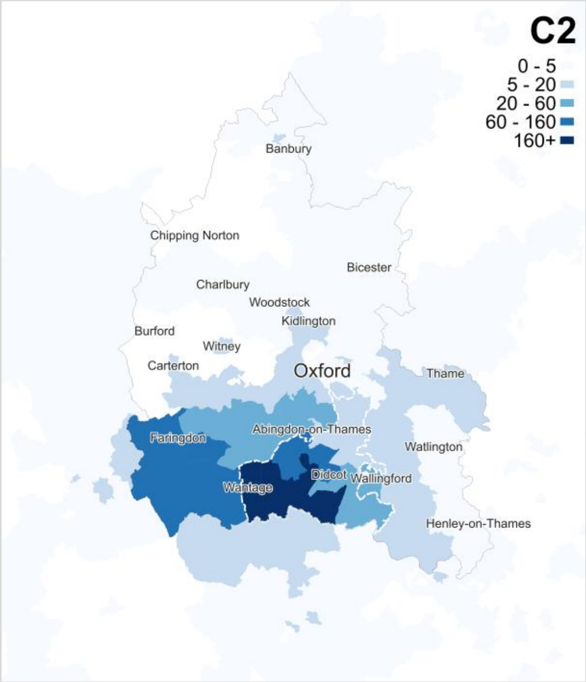
Source: Metro Dynamics analysis of Census 2021

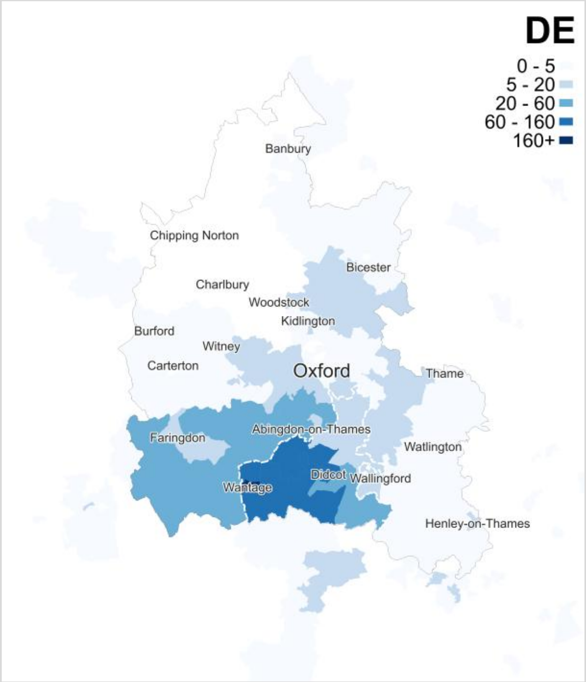
This varies by social grade, with high-skill workers travelling further



Page 159







AB: Higher & intermediate managerial, administrative, professional occupations

C1: Supervisory, clerical & junior managerial, administrative, professional occupations

C2: Skilled manual occupations

DE: Semi-skilled and unskilled manual occupations

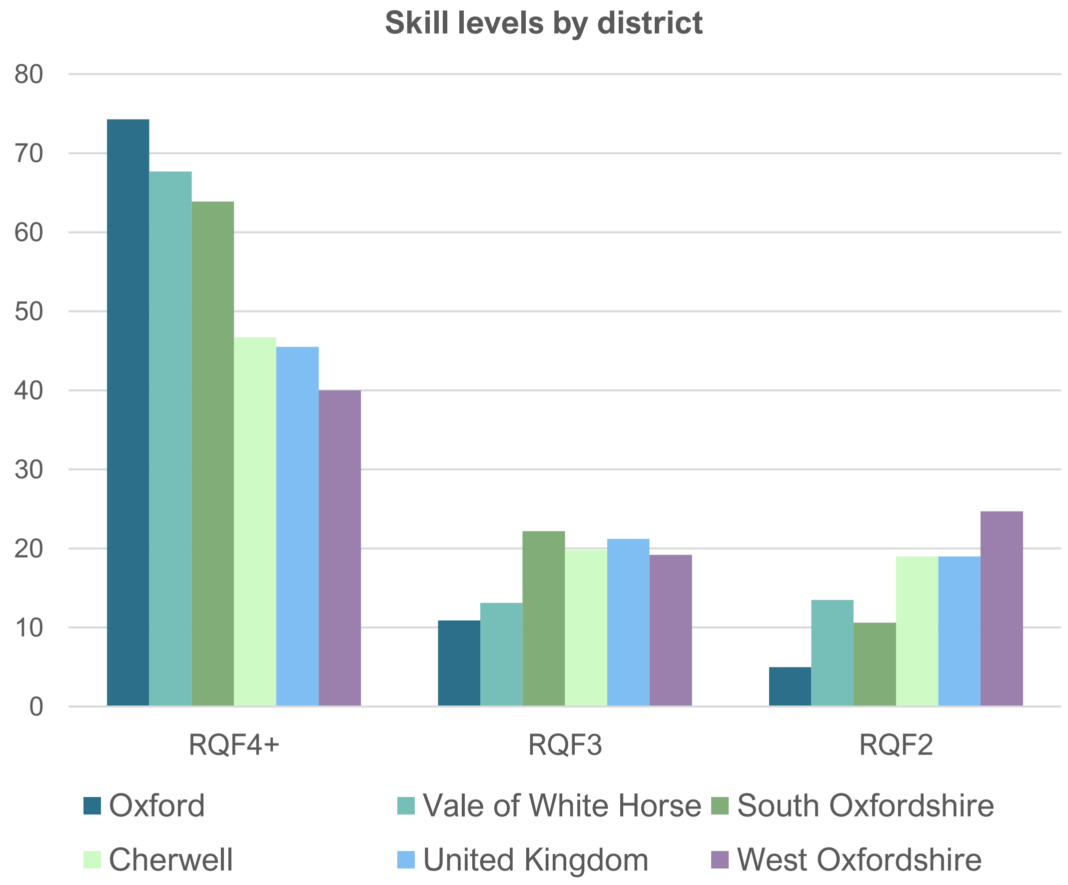
Source: Metro Dynamics analysis of Census 2021

* Custom definitions using best-fit MSOAs on built-up town areas

Overall, however, skill levels are very high across South Oxfordshire and the Vale

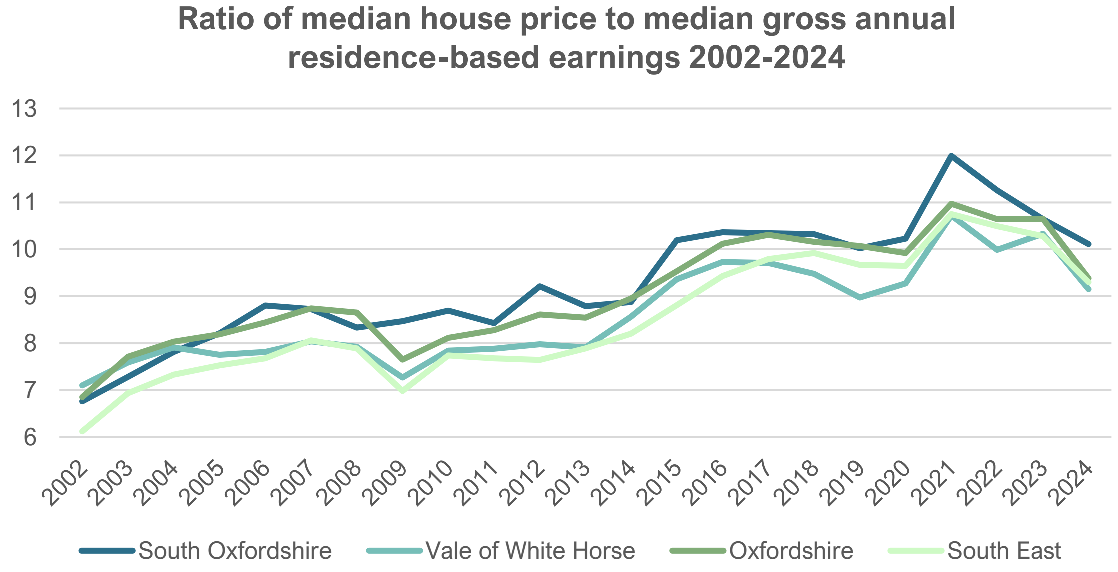
South Oxfordshire and the Vale have very high overall skill levels, with around **two-thirds of residents qualified to degree level and above**, well above national and regional averages.

However, a substantial minority of residents are below degree level, and as the evidence suggests, these residents are less well connected to the area's wider labour market and higher-value opportunities.



Source: Annual Population Survey

High housing costs constrain where people can live and work



Proportion of annual new homes target achieved (Local Plan 2024)	2021/22	2022/23	2023/24	2024/25
South Oxfordshire	106%	141%	108%	87%
Vale of White Horse	145%	164%	138%	146%

Alongside skills and transport, housing affordability is a further constraint on growth and labour market access.

The South and Vale Local Plan identified the need for additional housing in the district as a vital factor for future economic growth.

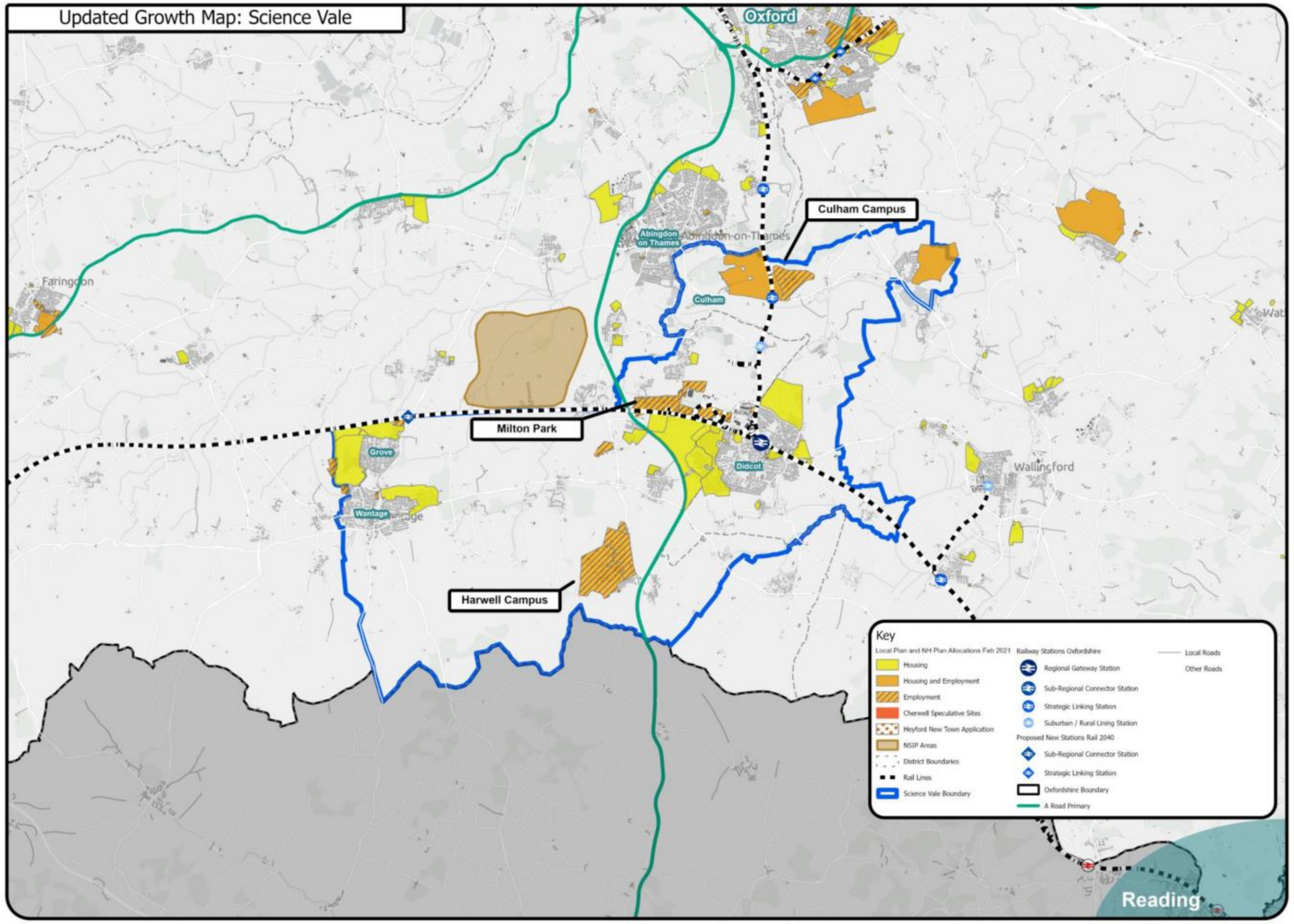
Housing affordability remains a significant issue in the Science Vale area, similar to the wider Oxfordshire region, with **median house price to median earnings ratios at 10.1x in South Oxfordshire and 9.2x in Vale of White Horse.**

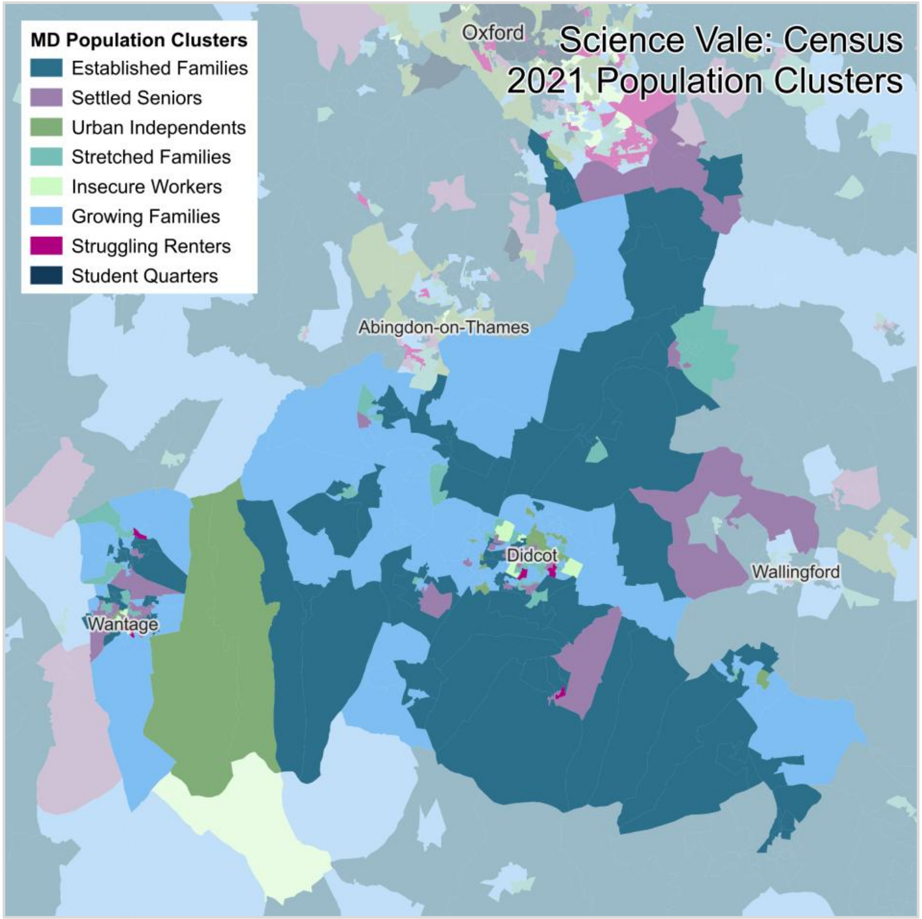
South and Vale have recently performed well in delivering new homes, surpassing the targets outlined in the Local Plan. The Oxford Growth Commission has pointed to opportunities to further actively support housing allocation and increase delivery near major employment centres to help reduce commuting distances.

Source: Metro Dynamics analysis of MHCG Data

In response to these pressures, growth is planned at scale, with allocations for 18,000 homes and 200ha of new employment land

Page 162





Source (left): South Oxfordshire and Vale Joint Local Plan

* Map uses custom definitions for best-fit MSOAs on the Science Vale area

Engagement Summary

Partnership & Governance. Science Vale's individual sites are pioneering world-class assets with mature approaches to development - Harwell's cluster leadership model being a strong example. As an area, however, it lacks an overarching partnership structure. Collaboration between sites is limited, funding remains largely site-by-site, and LDOs, while positive enablers, operate at the micro level.

Labour Market & Skills. Science Vale is not yet making full use of the local labour pool, with skills gaps a persistent issue. There is an opportunity to work more closely with large firms and major developments in the area to build local pathways, but local authorities currently lack the capacity to engage deeply and maximise their benefits.

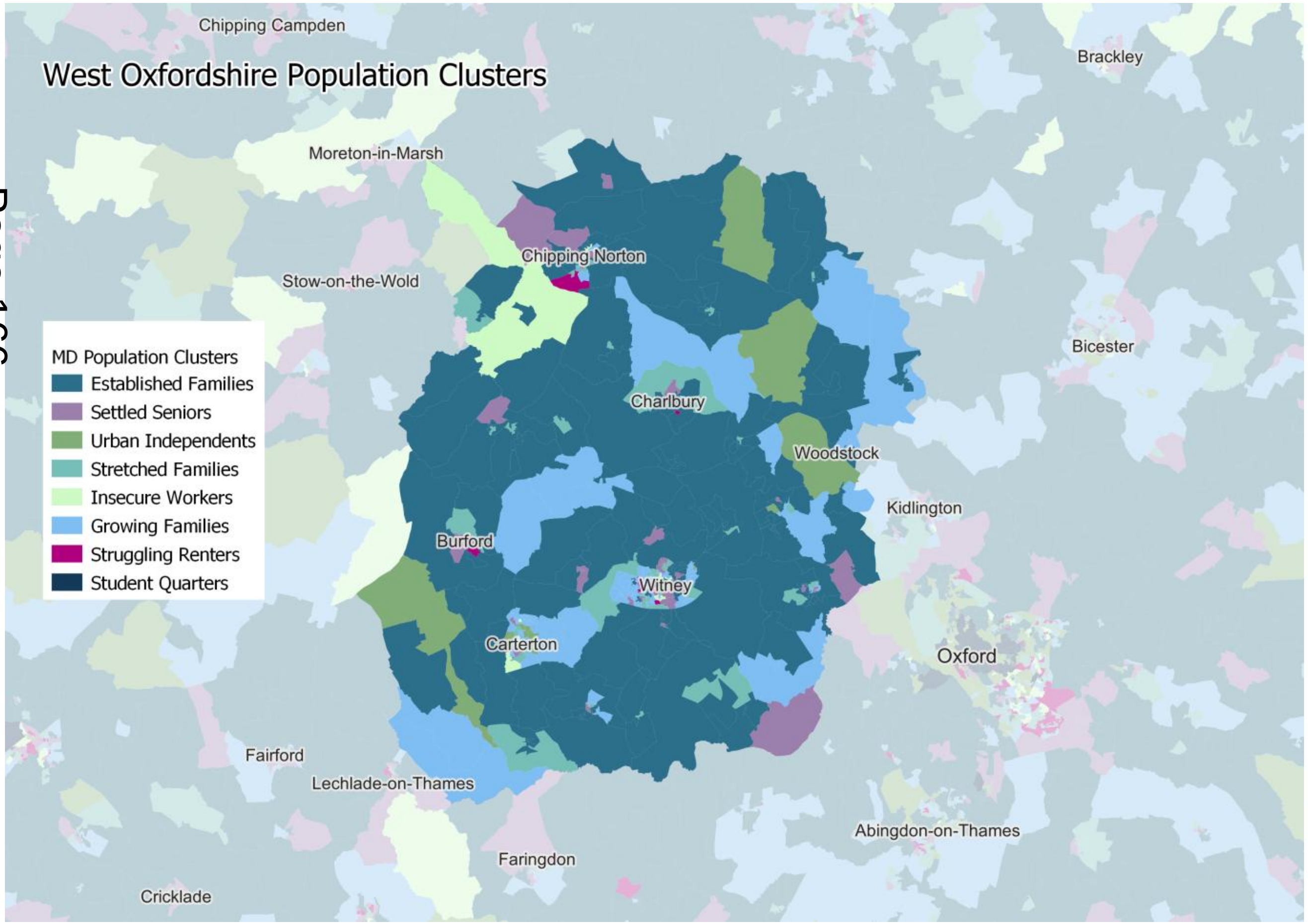
Transport & Infrastructure. For those already working in Science Vale, weak public transport restricts access to jobs - particularly for entry-level and shift-based roles, crucial entry points to the area's career pathways. HIF works should help significantly, but temporary disruption poses a short-term risk to investor and worker confidence. Science parks are also frustrated by the slow pace of wider public-sector network improvements.

Place-Shaping & Foundational Economy. Science Vale's ability to grow will depend on it being a thriving, attractive place for current and future workers beyond its high-tech sites. Improvements to transport, housing, amenities and evening-economy provision are essential to supporting a balanced, resilient local labour market.

Spatial Area	Science Vale		
Objective	**Establish a new joint growth partnership with a shared ambition to make a greater impact from this internationally significant economic corridor, through in-depth work with local skills and FE providers, significant investment in investment promotion and active cluster development**		
Context ⇨	**Rationale ⇨**	**Priorities ⇨**	**Impacts**
Science Vale is one of the UK's most significant concentrations of scientific and technology assets anchored around Harwell, Culham, Milton Park and the Enterprise Zones. It combines world-class R&D capability with large-scale planned growth in homes, infrastructure and employment land Strong growth is also occurring in data centres development Abingdon and Didcot remain more foundation economies, with growth in retail, health, and logistics Science Vale is poorly connected by public transport, constraining labour mobility and ability to attract younger and international workers HIF-funded upgrades will help but pose short-term disruption risks Skills levels are high across the two LAs but employers face shortages in mid-level technical roles	**Unlocking nationally significant innovation cluster** Harwell and Culham are high-growth engines, but current growth is constrained by transport bottlenecks, housing delivery and labour shortages **Moving beyond site-by-site development** Current growth is fragmented, driven by what individual sites can fund, rather than a strategic joined-up Science Vale system **Ensuring labour market access** Public transport weakness reduces access from Oxford City and surrounding towns International firms depend on high mobility and a culturally attractive environment for talent **Strengthening governance and capacity** A coherent triple-helix partnership, shared narrative, and delivery platform are essential to coordinate investment, skills and infrastructure	**Now..** Establish a streamlined Science Vale partnership with representatives from across the triple helix to drive greater impact from the corridor. Utilise the Science Vale partnership to coordinate delivery across existing strategies (including LSIP and Get Oxfordshire Working), align provision with employer need, and support inclusive growth alongside planned physical development Establish a clear interface with the OxCam Arc, showcasing Science Vale opportunity and need. **Next..** Agree and fund a promotion campaign that highlights business opportunities, career pathways, and the area's unique innovation ecosystem. Work with EquinOx to align messaging, share reach, and reinforce rather than duplicate each other. Facilitate cluster and sector development across Oxfordshire's science, business parks and Enterprise Zones, building on the model Harwell has established and expanding across science parks with a strong sector focus. Build deeper relationships between site managers and LA planning & skills leads, to take a forward look at future development and ensure continuity through LGR. Bring this together in a Science Vale investment pipeline. Improve connectivity to key employment sites within Science Vale, building on the Ox Rail 'Science Line' concept, whilst also progressing planned HIF-funded infrastructure at pace Work with skills and FE providers, including key assets such as UTC Oxfordshire, to develop a local labour market strategy, coordinating with the LSIP to align local provision with the high demand for entry- and mid-level technical and engineering roles within both the innovation economy and the expanding built environment sector. **Future…** Invest in Careers, Information, Advice and Guidance for school pupils to showcase local STEM roles and entry routes, increasing the visibility of the science/business parks and their associated opportunities. Prioritise inclusive growth outcomes, with Science Vale acting as an anchor institution. Work with developers, local authorities, transport providers, and local residents to ensure Science Vale develops as a thriving place to live and work. This means prioritising town centre vitality, housing quality and affordability, transport connectivity, and the amenities and evening economy that meet the expectations of those living and working in the area.	Greater agglomeration benefits through coordinated development of Harwell, Culham, Milton Park and towns Increased inward investment and stronger retention of scale-ups Improved access to Science Vale jobs for residents across Oxfordshire Reduce skills gaps in technical and mid-level roles Stronger pipeline connecting FE, HE, and employers Reliable, integrated transport network reducing car dependence and broadening catchment areas Stronger, more vibrant towns that retain young workers and attract talent Unified, strategic leadership structure capable of driving delivery Stronger narrative and identity for Science Vale as a global innovation hub
Why now?	***Science Vale holds national-level potential for science-driven growth, but this cannot be fully realised without addressing connectivity, coordination, workforce access and place attractiveness***		

West Oxfordshire

West Oxfordshire is a rural economy, with populations clustered around key towns



Page 166

West Oxfordshire is home to approximately 114,200 people (2021), with residents clustered around its four main towns: Witney, Carterton, Burford and Chipping Norton

A **higher proportion of the population are over 65** than national and regional average – this is set to rise in the future

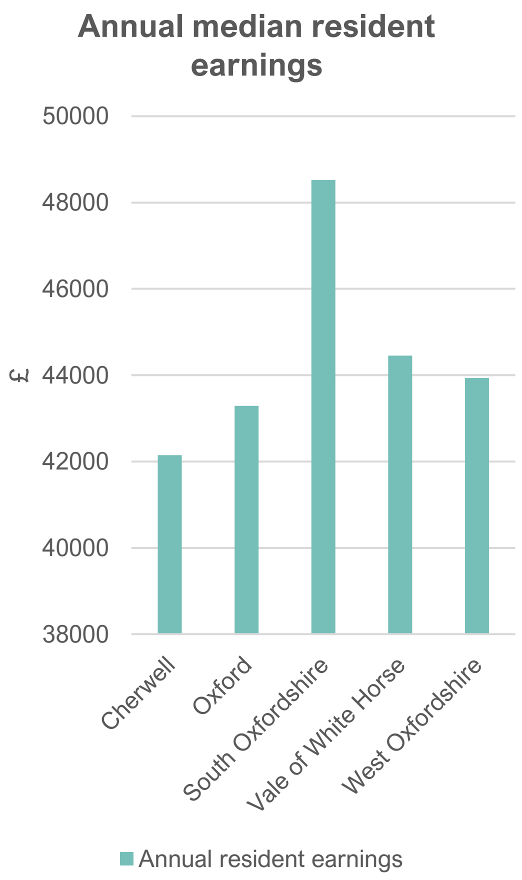
The **majority of the population are established families**, with younger families and settled seniors clustered around key towns

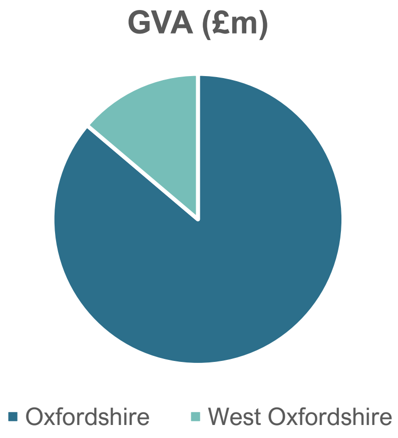
West Oxfordshire ranks 301st out of 317 local authorities for deprivation, making it one of the **least deprived areas nationally**

Source: Metro Dynamics analysis of Census 2021

Despite its small size, economic indicators around productivity and earnings are relatively robust

Page 167





Despite accounting for just 16% of Oxfordshire's Gross Value Added (GVA), West Oxfordshire demonstrates notably strong average productivity levels, exceeding the overall Oxfordshire average by approximately £400. This higher productivity reflects positively on the economic performance of the area.

As a result, residents of West Oxfordshire enjoy robust earnings, positioning the district among the top earners in the county. Only the South Oxfordshire and Vale of White Horse districts report higher average resident incomes than West Oxfordshire, underscoring the area's economic vitality and the benefits experienced by its workforce.

Source: Metro Dynamics analysis of Regional GVA, 2023

West Oxfordshire's sector strengths leans toward foundational sectors, specialising in leisure, hospitality and farming

Unlike the rest of Oxfordshire, where the majority of employment is dominated by Education and Professional Services, the **majority of West Oxfordshire residents are employed in Leisure, Retail and Health and Social Care**

Life Science and Digital are growing in West Oxfordshire but from a lower base than neighbouring authority's

Sector grouping	Sum of Emp_23	Emp_CAGR	Sum of Bus_23	Bus_CAGR	Sum of GVA_23	GVA_CAGR	Productivity_23	Prod_CAGR	Avg_con_23	Avg_con_change
Leisure & Hospitality	8440	4.7%	425	2.30%	£304	-0.02%	£36,050	-4.5%	1.3	7.4%
Retail & Wholesale	6760	-1.1%	680	-0.10%	£209	-2.05%	£30,940	-1.0%	0.9	-3.6%
Health and Social Care	4750	1.8%	200	0.50%	£176	1.18%	£37,053	-0.7%	0.8	-0.2%
Education	4500	1.2%	110	1.90%	£226	7.70%	£50,166	6.4%	1.1	2.4%
Digital and Technologies	3160	1.6%	505	-1.70%	£132	3.03%	£41,815	1.4%	1.1	6.8%
Professional Business Services	3150	-4.5%	1010	-0.90%	£123	-2.62%	£39,016	1.9%	0.8	-9.0%
Construction	2950	1.3%	860	1.60%	£224	7.10%	£75,932	5.7%	1.1	-2.6%
Other Services	2565	0.6%	390	1.90%	£139	4.56%	£54,279	4.0%	1.0	-1.3%
Life Sciences	2245	4.4%	20	14.90%	£187	0.25%	£83,155	-4.0%	7.5	5.7%
Manufacturing	2090	-0.2%	135	0.00%	£121	-1.94%	£57,991	-1.7%	1.1	2.9%
Other Transport activities	1440	-1.1%	80	5.90%	£86	0.42%	£59,826	1.6%	0.7	-7.5%
Real Estate	1335	6.1%	240	3.20%	£562	0.00%	£420,974	-5.7%	1.2	9.3%
Farming	1170	0.3%	395	-0.50%	£93	1.10%	£79,508	0.8%	1.6	2.6%
Financial Services	1055	3.8%	75	0.00%	£17	9.10%	£16,114	5.1%	0.6	5.7%
Public Administration	745	1.3%	45	0.00%	£497	0.41%	£667,114	-0.8%	1.5	-7.5%
Advanced Manufacturing	690	7.5%	20	-7.80%	£90	7.87%	£129,748	0.3%	0.9	-7.3%
Creative Industries	660	-1.4%	275	3.20%	£33	-1.28%	£50,077	0.2%	1.1	1.1%
Ports and Logistics	465	-3.1%	60	0.00%	£25	0.52%	£54,190	3.8%	0.5	-17.1%
Utilities	410	-8.7%	20	-4.40%	£33	-0.75%	£80,298	8.7%	0.9	-37.9%
Digital Manufacturing	365	13.9%	15	-9.70%	£53	14.12%	£145,213	0.2%	1.7	0.8%
Digital and Creative	355	-0.3%	120	2.70%	£16	-8.23%	£46,255	-8.0%	0.9	-2.6%
Agri-Food	305	-1.0%	20	14.90%	£20	-5.10%	£64,656	-4.2%	0.7	27.6%
Clean Energy	270	1.1%	5	0.00%	£39	1.79%	£145,213	0.6%	0.8	4.1%
Fossil Fuels	180	4.4%	5	0.00%	£6	4.38%	£36,085	0.0%	1.0	27.9%
Mining	50	14.9%	5	0.00%	£4	15.83%	£79,508	0.8%	3.5	724.2%
Defence	0	0.0%	0	0.00%	£0	0.00%		0.0%	0.0	0.0%

Source: Metro Dynamics analysis of BRES 2025 and Regional GVA, 2025

Like Cherwell, West Oxfordshire's growth is driven by local effects

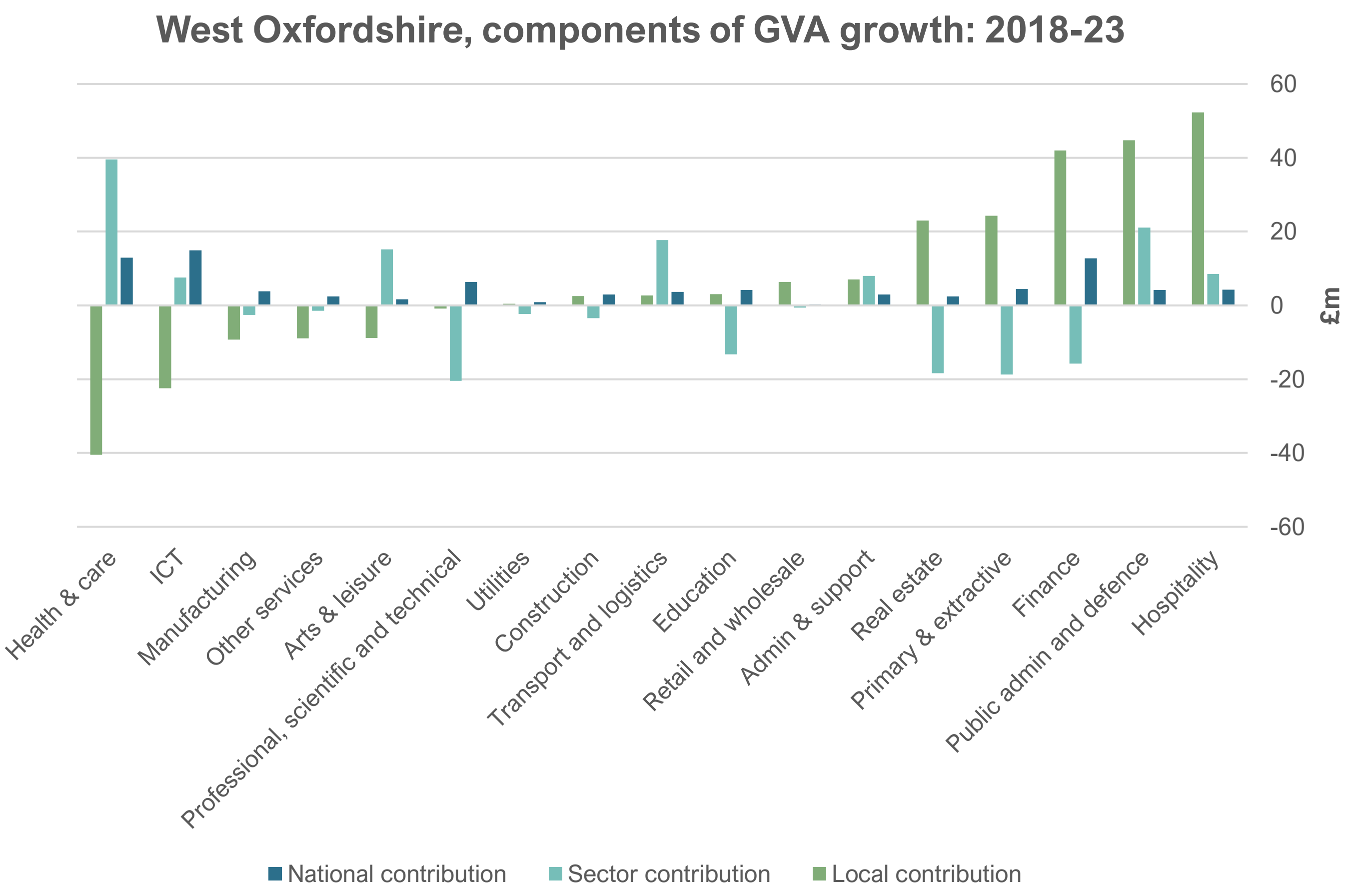
West Oxfordshire's economy outgrew national GVA trends over the period.

Of this, very little was due to the district being concentrated in fast-growing sectors at the national level.

Instead, the majority of additional GVA growth reflects stronger-than-expected performance within sectors relative to national and sector-specific benchmarks.

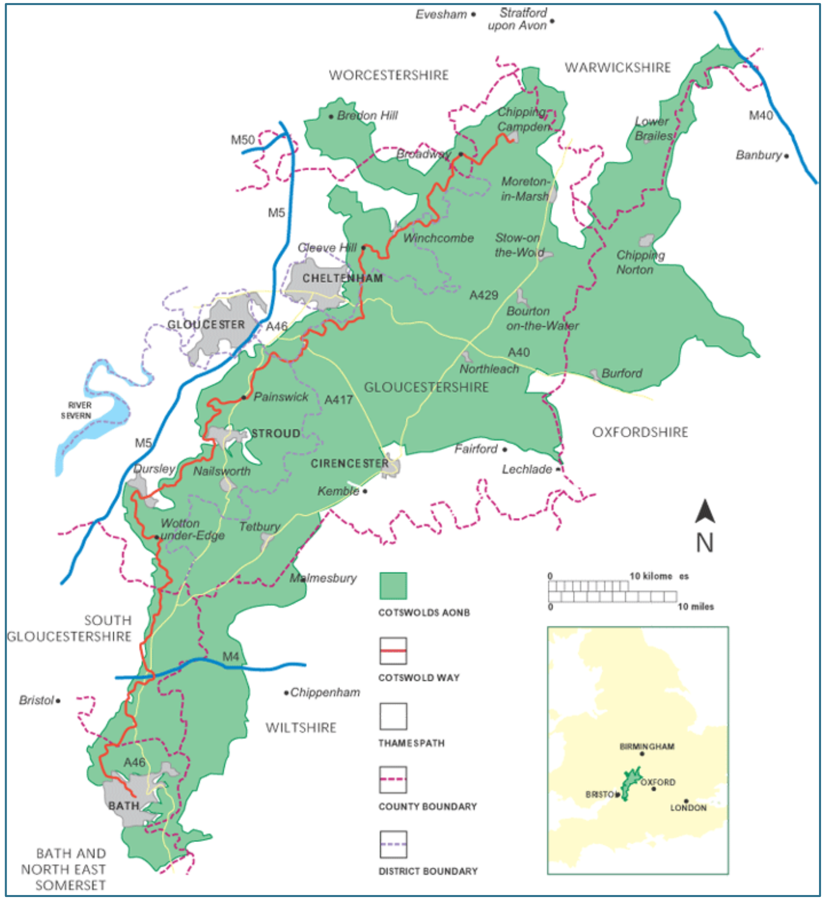
Across sectors:

- Strong local outperformance in hospitality, public administration and financial services
- Weaker performance relative to benchmarks in health and ICT activities



Above average employment in tourism industries is connected to West Oxfordshire's natural assets and visitor attractions

West Oxfordshire Visitor Economy (2024)	
Staying visitor trips	487,600
Day visits	3,101,000
Total visitor related spend	£260m
FTE employment	2,567
Proportion of all employment	6%



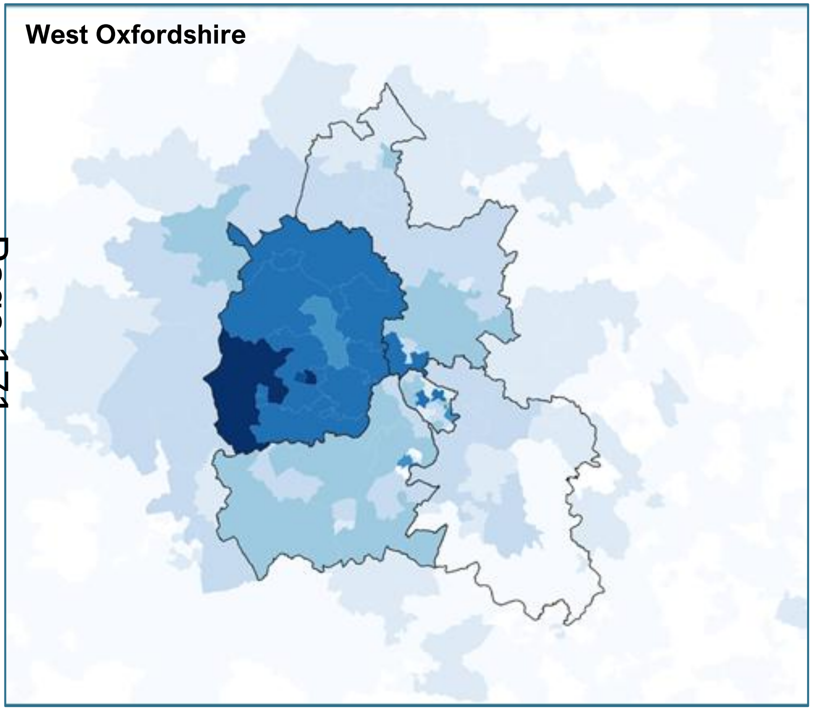
West Oxfordshire's visitor economy is a major contributor to the Cotswolds brand; As part of Cotswold Plus, the Local Visitor Economy Partnership (LVEP) led by Cotswolds Tourism, West Oxfordshire is covered by the partnership's remit for responsible marketing and coordinated destination management, ensuring the district's visitor economy is integrated into a wider strategic framework across the Cotswolds

West Oxfordshire's visitor offer includes major heritage attractions such as **Blenheim Palace**, alongside high-quality accommodation, nature-based experiences, and independent retail. These assets are also marketed via Experience Oxfordshire

The Cotswolds Destination Management Plan highlights key growth opportunities around strengthening sustainable tourism, widening the region's appeal beyond its iconic villages, enhancing year-round visitor experiences, and improving digital-first marketing and partnership working

Source: Cotswolds Tourism Destination Management Plan, Economic Impact of West Oxfordshire's Visitor Economy 2024

Transport times are a constraint on growth



Page 171

Travel Time Indexed to England 2019	Travel time in minutes to nearest employment centre with 100-499 jobs				Travel time in minutes to nearest employment centre with 500-4999 jobs			
	Public Transport	Cycle	Car	Walking	Public Transport	Cycle	Car	Walking
England	1	1	1	1	1	1	1	1
Oxfordshire	1.4	1.2	1.1	1.6	1.1	1.1	1.0	1.1
West Oxfordshire	1.6	1.5	1.2	2.3	1.2	1.2	1.1	1.5

Commuting data shows that West Oxfordshire is generally a self-contained labour market, with some linkages to Oxford City. There are weaker labour market ties with Cherwell and Vale, as well as westward into the Cotswolds.

The West Oxfordshire Local Plan 2031 identifies that 80% of all commuting journeys are made by car, which has implications on congestion and air quality. This high car reliance is driven by poor public transport connectivity to key employment sites.

Source: Metro Dynamics analysis of Census 2021, DfT Transport Data and West Oxfordshire Local Plan 2031

The primary challenge for residents is housing affordability, compounded by the slow pace of new developments

Housing purchase affordability ratios						
Local authority name	1998/99	2004/05	2009/10	2014/15	2019/20	2023/24
West Oxfordshire	5.13	8.95	9.19	8.94	9.49	9.09
England	4.37	7.67	7.59	7.6	7.98	7.89

House Delivery against LHN Standard Method			
LA	**Actual Net Additional Dwellings (2024/25)**	**Difference to old LHN Standard Method**	**Difference to new LHN Standard Method**
West Oxfordshire	304	-245	-601

Housing affordability in West Oxfordshire has declined over the past twenty years, mirroring trends across Oxfordshire. At present, only Oxford and South Oxfordshire have greater affordability challenges.

Historically, **West Oxfordshire has underperformed in housing delivery**, constructing fewer homes than the previous national targets required. The revised NPPF has further increased this shortfall, with only Oxford showing a poorer housing delivery record.

According to the Oxford Growth Commission, West Oxfordshire is committed to meeting minimum housing targets outlined in its Local Plan. Significant projects like Salt Cross contribute positively, but issues such as **fragmented land ownership continue to hinder timely delivery**

Source: Metro Dynamics analysis of MHCLG data sets, Oxford Growth Commission, 2025

Engagement Summary

Transport. As a rural district, West Oxfordshire is heavily reliant on car commuting. There is an emerging opportunity around a proposed A40 Mass Rapid Transit looking to connect Witney and surrounding towns with Oxford, as outlined in the OxRail plan.

Visitor Economy. With 12% of the district falling within the Cotswolds, there is high visitor interest and a strong existing offer. There is an opportunity to better link this into the education system and wider visitor economy assets, including the incoming Puy du Fou attraction.

Sectors. Brize Norton represents an underutilised specialised workforce with limited spin-out into a wider cluster to date. The area also has connections into Motorsport Valley, with an F1 team based north of Chipping Norton, offering further potential to build on the area's future mobility strengths.

Place Quality. Housing delivery has been slow, though the area remains highly desirable. West Oxfordshire's towns have a strong community of local businesses across retail and hospitality that have worked to improve the general attractiveness of the area - a very strong foundation to build on.

Spatial Area	West Oxfordshire		
Objective	Enable West Oxfordshire to sustain high productivity and resilience by unlocking housing delivery, strengthening foundational and visitor economies, and better integrating its assets into Oxfordshire's wider innovation and labour market		
Context ⇒	**Rationale ⇒**	**Priorities ⇒**	**Impacts**
West Oxfordshire is a predominantly rural economy, with activity clustered around Witney, Carterton, Burford and Chipping Norton The district accounts for around 16% of Oxfordshire's GVA, yet demonstrates above-average productivity relative to the county average and strong resident earnings (third highest in the county) Employment is concentrated in foundational sectors: leisure & hospitality, retail, health & social care, education, and farming. Life sciences, digital, and advanced manufacturing are present and growing, but from a lower base than neighbouring districts The visitor economy is a major asset, strongly linked to the Cotswolds brand, generating substantial visitor spend and employment West Oxfordshire has an older population profile and relatively low deprivation compared to nationally Housing affordability is a growing constraint, with declining affordability over time and persistent under-delivery of housing against targets Transport connectivity is weak, with high car dependency and limited public transport access to key employment centres, including Oxford and Science Vale. Many of West Oxfordshire's market towns show strong sense of civic pride, with local businesses and stakeholders taking an active involvement in place-shaping; however, local capacity is inconsistent across certain areas.	**Housing is a binding constraint** Limited housing delivery and affordability pressures restrict labour supply, workforce retention and inward migration, undermining otherwise strong productivity performance **Key assets offer opportunities for spillover effects** Strategic assets (e.g. RAF Brize Norton, farming and land-based activities, and proximity to Motorsports Valley and future mobility clusters) provide a strong foundation for deeper integration with the wider county innovation economy **Connectivity challenges** Poor public transport limits access to higher-value jobs elsewhere in Oxfordshire, reinforcing car dependency and constraining inclusive growth	**Now…** Position housing delivery as a core economic enabler by accelerating priority sites and explicitly linking new homes to workforce retention, affordability pressures and West Oxfordshire's role in supporting the wider Oxfordshire labour market Strengthen productivity and resilience in the foundational and visitor economy by targeting SME support toward tourism, hospitality, retail and land-based businesses, building on strong local business networks to support year-round trading and local vibrancy **Next…** Develop targeted workforce and skills pathways linked to RAF Brize Norton to ensure that skills & contractor demand benefits the local labour market & supply chains and creates opportunities for the exiting workforce to remain and progress within West Oxfordshire Strengthen connections with Motorsports Valley and the emerging future mobility cluster across north Oxfordshire to position West Oxfordshire as a complementary location for high-value engineering, supply-chain activity and specialist skills Strengthen collaboration between Cotswold Plus LVEP and Experience Oxfordshire to better join up West Oxfordshire's visitor economy with emerging event and theme park-based attractions in Cherwell in order to extend visitor stays and increase spend **Future…** Improve connectivity and labour-market integration by championing the Carterton–Witney–Oxford corridor and other strategic transport improvements, reducing car dependency and widening access to higher-value employment opportunities across the county Embed West Oxfordshire as a complementary pillar of Oxfordshire's innovation economy in areas such as land-based industries by aligning its high-quality living environment, workforce supply, visitor economy and specialist skills with the county's science, technology and advanced manufacturing strengths	Sustained high productivity with improved resilience of the local economy Stronger spillovers between rural, visitor and innovation economies. Improved housing affordability Better access to employment opportunities across Oxfordshire through enhanced connectivity West Oxfordshire functions as a complementary pillar of the Oxfordshire economy Improved SME capability and resilience in tourism and foundational sectors Clearer pathways between West Oxfordshire assets and county-wide innovation clusters Greater visibility of local skills and employment opportunities
Why now?	**Housing affordability pressures, constrained connectivity and growing demand from Oxfordshire's innovation economy mean that action is needed now to prevent workforce constraints from undermining West Oxfordshire's strong productivity base**		

Next Steps

Next steps to mobilise this strategy and delivery framework

This report has been prepared for Oxfordshire County Council and is intended to support collective economic development action by OCC, Enterprise Oxfordshire and District Council partners. As such, the following next steps are recommended:

- One of the biggest takeaways from this work is the recognition that Oxfordshire is a complex economic geography, with county-wide constraints (set out in Report 2A) and spatial growth opportunities (Report 2B). In a time of change, with local government reorganisation underway and a potential devolution settlement, it is important to focus on the functions, integration, and leadership required at the county level to deliver the economic growth priorities. Stewarding collaboration around a set of goals and functions with agreed pan-county resource is especially important through the transition. Planning out and agreeing the resource and what funding is required is a sensible next step (e.g. enterprise zone monies). Enterprise Oxfordshire, as a Teckal company of the county council, is an important vehicle for delivery. EquinOx was mentioned at various points of the work, and we have built it into some of the spatial priorities around inward investment. These are good examples of pan-county forms that deliver the economic growth functions regardless of future administrative boundaries.

- Several stakeholders raised the significant number of existing groups, partnership boards and other collaboration mechanisms that are overlapping in function and purpose. Establishing new partnerships to deliver the actions set out in this report risks adding to this already busy and confusing picture and we suggest mapping the existing partnerships to understand the role and responsibilities of each in delivering these priorities.

- The four spatial priorities each have now, next and future priorities to focus on. Whilst these should collectively be championed at county-level, each requires different partners to bring forward. It is recommended that you start with mobilising a small and focused group around one spatial area to agree a joint plan, actions and owners. Working with partners on a plan could then highlight groups that are duplicating or no longer required, and incremental action taken to streamline from this.

At Metro Dynamics, we **care** about places, our clients, and our colleagues.

We are an **independent** organisation, **curious** about our work, and **collaborative** in our approach. We strive to **make a difference** in all that we do.

Metro —— Dynamics

3 Waterhouse Square
138 Holborn
London
EC1N 2SW

020 3865 3082

1 St Peter's Square
Manchester
M2 3DE

0161 8833736

This page is intentionally left blank

Annex E: Enterprise Oxfordshire - overview

1. Purpose of the report

This annex provides:

- A clear explanation of what Enterprise Oxfordshire is and what it does
- The governance arrangements and rationale for the current model
- Context on good practice in economic development agencies, including OECD evidence
- High-level performance information from 2025/26 (to Q3)
- An assessment of alternative delivery models and associated trade-offs

2. What is Enterprise Oxfordshire?

Enterprise Oxfordshire is the County Council's economic development delivery company, responsible for implementing programmes that support:

- Business growth and productivity
- Employment and skills
- Inward investment
- Delivery of economic strategy

It is the successor to the Oxfordshire Local Enterprise Partnership (OxLEP), following national reforms which brought LEP functions under local authority accountability. It differs from OxLEP in that it is now wholly owned by Oxfordshire County Council.

2.1. Legal and governance form

Enterprise Oxfordshire is constituted as a company limited by guarantee, with Oxfordshire County Council as the sole company member. This means the company benefits from the Teckal exemption, enabling direct commissioning from the company member, while retaining a degree of commercial flexibility. It is fully accountable to the Council, but operationally distinct.

As a company limited by guarantee, Enterprise Oxfordshire is governed by its Articles of Association (which set out how it operates) and is managed by directors, who oversee operations and ensure it stays compliant with its obligations and legal requirements.

Company operations are overseen by its Board of non-executive directors, which currently comprises of one elected member and two senior officers. A private sector chair is currently being recruited, with a recommendation due to be made to the Shareholder Committee on 16 June.

As per Part 7 the company's Articles of Association, the rights of directors to make decisions with regard to the company are subject to a number of "reserved matters," which are subject to approval of the County Council via the Shareholder Committee. There are 20 reserved matters, including (inter alia) approval of the business plan and budget; the appointment and removal of senior staff; and the appointment of auditors and approval of the balance sheet / profit & loss account.

2.2. Its role in the system

Enterprise Oxfordshire acts as a delivery arm for Council-led economic strategy (although it should be noted that, at present, the County Council has neither adopted nor endorsed an economic strategy or plan). It is a bridge between policy and the market, translating strategy into delivery, and has the ability to act as a convener of partnerships across business, education and the public sector (although this is currently under-utilised).

In practical terms, it delivers programmes such as:

- Growth Hub (business support)
- Skills Bootcamps and employment programmes
- Careers Hub (education-business interface)
- Inward investment activity
- Capital programme delivery (e.g. LGF/GBF)

3. Why use an arm's-length economic development body?

3.1. International evidence (OECD)

The OECD identifies arm's-length economic development agencies as a widely adopted model internationally. These organisations are considered effective because they:

- Focus specifically on economic development
- Operate with greater agility than the public sector
- Act as "bridging institutions" between public policy and private markets

3.2 Features of high-performing models

OECD evidence highlights several characteristics of "good practice" agencies:

- Operational autonomy with accountability
- Strong private-sector engagement
- Specialist expertise and institutional continuity
- Partnership governance (public–private–academic)
- Commercial flexibility (e.g. funding, partnerships)

4. Current governance model

Enterprise Oxfordshire operates a "controlled arm's-length" model, combining full public ownership and accountability, a separate corporate structure, and delegated delivery responsibility.

The current model reflects national policy changes requiring democratic accountability, while retaining delivery capability. It allows the Council to set strategy and priorities, and retain financial and governance control, while enabling Enterprise Oxfordshire to:

- Deliver programmes more flexibly than an in-house service
- Maintain business relationships and specialist expertise
- Operate in a more market-facing way

5. Performance and delivery (2025/26 Q3 overview)

Enterprise Oxfordshire delivers a portfolio of economic programmes, and core economic outputs (jobs, businesses supported) are meeting or exceeding targets. Skills programmes show mixed delivery performance, with strong outcomes but some delivery challenges (many of which are national challenges). In summary, Enterprise Oxfordshire is performing strongly relative to national programmes in many areas, and high-level performance to Q3 2025/26 includes:

5.1 Business growth and support

- 1,389 businesses supported (YTD) against 1,250 annual target
- 185 jobs created (target: 40)
- 666 jobs safeguarded (target: 300)
- Business accelerator programmes exceeding targets by 40%+
- Specialist support (e.g. AI, marketing, cyber resilience) delivered

5.2 Employment and skills

Apprenticeships and levy transfer:

- 544 apprenticeship starts supported
- £6.6m levy funding utilised
- 210 SMEs engaged

No Limits programme (closing phase)

- 171 participants supported
- 123 work-ready
- 61 into employment

Connect to Work

- 56 participants onboarded
- Programme delivered on national target, outperforming national average performance

Careers Hub

- 283 employers engaged
- 82 SMEs engaged (towards annual target of 100)
- Strong system leadership preparing for national work experience reforms

Skills Bootcamps

- Wave 5:
  - 56% of starts achieved
  - 70% completions
  - 118% of outcome target achieved
- Wave 6:
  - Delivery underway, with outcomes expected later in 2026

Community Employment Plans

- 673 jobs created (YTD)
- Strong pipeline of development-linked employment initiatives

5.3 Inward investment and strategic programmes

- Active engagement with government, investors and sector clusters (e.g. life sciences, quantum)

5.4 Legacy capital programmes

- Getting Building Fund programme meeting overall targets
- 26 of 32 LGF projects meeting targets

6. Value for money

One of the major benefits of an arms' length model is that it can deliver better value for money than alternative models. Value for money in this context is assessed in terms of:

- Economy (cost of operating the function)
- Efficiency (outputs delivered for the resources used)
- Effectiveness (extent to which intended economic outcomes are achieved)

6.1 Financial position

Enterprise Oxfordshire operates with a relatively modest cost base:

- Core funding (2025/26): £2.26m
- Additional leveraged funding: £1.1m
- Total programme and enabling funding: £3.38m

It is important to note that Oxfordshire County Council does not make a direct revenue contribution to Enterprise Oxfordshire – it is entirely funded from other sources:

- 55% funded from local retained sources (Enterprise Zone income and reserves)
- 45% from external or programme-related sources

6.2 Indicative value metrics

While not all programmes are directly comparable, indicative value can be inferred as follows:

- The cost per business supported is relatively low when set against the overall budget
- Employment outcomes (jobs created/safeguarded) compare favourably with typical public economic development programmes
- The apprenticeship levy programme demonstrates high financial leverage, with £6.6m distributed to employers against relatively limited administrative overhead

6.3 Comparison with alternative models

There is no real counter-factual available to answer definitively the question of whether this activity could be delivered more efficiently and effectively – however, the evidence provided by the OECD provides a strong indicator that, overall, arms' length bodies are considered to be good practice

Model	Value considerations
Fully in-house	Likely lower overhead and greater transparency, but risks of reduced performance due to slower processes and weaker business engagement

Fully arms' length	Potential for higher impact and additional income generation, but with higher risk, less direct control, and potentially higher operating costs
Current hybrid model	Relatively low cost base, good delivery performance, benefits from the Teckal exemption, and ability to leverage external and commercial funding

6.4 Limitations of the current position
There are, however, constraints which may affect long-term value:

- A relatively narrow governance base limits commercial thinking, partnership working, external challenge, and innovation
- Reduced perceived independence could affect investor or partner engagement
- Currently, no income generation beyond public sector grants
- Processes between Enterprise Oxfordshire and the County Council sometimes act as a brake and limit the pace of delivery

6.5 Overall assessment
Enterprise Oxfordshire is delivering strong outputs relative to its cost base. It is successfully leveraging external funding to deliver much-needed services for business and residents, and provides capability that would be difficult and potentially more costly to replicate fully in-house.

The current model therefore represents good overall value for money, particularly in terms of:

- Scale of delivery achieved
- External funding leveraged
- Alignment with Council priorities
- Cost per job

However, there is scope to enhance value further through:

- Broader external governance and expertise
- Fostering genuine collaboration across the county
- Loosening of processes while providing accountability and assurance
- Continued improvement in performance transparency and benchmarking
- Increased commercial activity and income generation

This will be particularly important in the context of local government reorganisation. The work on economic strategy has provided robust evidence of the need for both increased functional delivery, alongside partnership and collaboration mechanisms.

7. Future considerations

The Enterprise Oxfordshire Board has considered its current governance and partnership working arrangements. Areas for potential development include:

- Strengthening private sector and partner involvement in company membership, governance, and delivery
- Enhancing commercial capability and flexibility
- Continuing to improve performance transparency to members
- Clarifying the long-term role of Enterprise Oxfordshire within the county's economic development system

This page is intentionally left blank

OXFORDSHIRE COUNTY COUNCIL

Work Programme
Performance and Corporate Services Overview and Scrutiny Committee

Councillor Glynis Phillips, Chair | Tom Hudson, Scrutiny Manager
tom.hudson@oxfordshire.gov.uk

Topic	Relevant strategic priorities	Purpose	Type	Lead Presenters
12 June 2026				
Business Management Monitoring Report, with a focus on the Fire Service	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at the Fire Service.	Scrutiny	Cllr Fawcett; Cllr Levy; Ian Dyson; Kathy Wilcox; Rob MacDougall
Commercial Strategy Progress Update	Underpins all	To review the progress of the Council's Commercial Strategy	Scrutiny	Cllr Levy; Ian Dyson; Richard Scarlett
Economic Strategy	Underpins all	To review the draft Economic Strategy prior to it being considered at Cabinet	Overview	Cllr Gordon; Robin Rogers, Nick Glover
18 September 2026				
Wider Social Value	All	To review the Council's progress on drawing together its strands of	Overview	Cllr Levy; Ian Dyson, Richard

		work around Social Value into a single, coherent policy		Scarlett, Max Button
Business Management Monitoring Report, with a focus on Resources	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at Resources.	Scrutiny	Cllr Fawcett; Directors to be invited at a later point as there is the potential for many to have to attend.
AI benefits	Underpins all	To review the Council's use of AI: its cost, its usage, the mitigations against dangers, the monitoring of value. An in-depth look at the use of AI within the customer service centre is requested.	Overview	Cllr Fawcett; Lorna Baxter; Other leads to be confirmed
IT and IT security update	Underpins all	To receive a healthcheck and update on the work of the IT team and IT security	Overview	Cllr Fawcett; Lorna Baxter, Alastair Read
04 December 2026				
Marmot Integration	Fairer, Healthier	To review the Council's progress in implementing a system-wide approach towards achieving the Council's Marmot principles concerning health inequalities	Overview	Cabinet member Gregory, Ansaf Azhar, Karen Fuller, Lisa Lyons
Business Management Monitoring Report, with a focus on Children, Education and Families	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a	Scrutiny	Cllr Gaul; Lisa Lyons

OXFORDSHIRE COUNTY COUNCIL

		focused look at the Children, Education and Families service		
Communications and Marketing Update	Underpins all	To receive a healthcheck and update on the work of the Comms and Marketing team	Overview	Cllr Fawcett; Susannah Wintersgill, Other leads TBC
15 January 2027				
Budget	All	To review the proposed budget prior to its consideration by Cabinet and, ultimately, Council.	Scrutiny	All Cabinet members and directors invited
16 April 2027				
Business Management Monitoring Report, with a focus on Economy and Place, and Environment and Highways	All	To review performance, assess progress against strategic priorities, and hold decision-makers accountable for effective service delivery and resource use. The review will take a focused look at the Economy and Place, and Environment and Highways services	Scrutiny	Cllr Epps, Leffman and Gordon; Robin Rogers; Paul Fermer

Sub-groups				
Name	**Relevant strategic priorities**	**Description**	**Outcomes**	**Members**
There are currently no sub-groups				

Briefings/Other					
Date	**Topic**	**Relevant strategic priorities**	**Description**	**Outcomes**	**Presenters**
There are no scheduled member briefings					

Overview & Scrutiny Recommendation Response Pro forma

Under section 9FE of the Local Government Act 2000, Overview and Scrutiny Committees must require the Cabinet or local authority to respond to a report or recommendations made thereto by an Overview and Scrutiny Committee. Such a response must be provide d within two months from the date on which it is requested[1] and, if the report or recommendations in questions were published, the response also must be so.

This template provides a structure which respondents are encouraged to use. However, respondents are welcome to depart from the suggested structure provided the same information is included in a response. The usual way to publish a response is to include it in the agenda of a meeting of the body to which the report or recommendations were addressed.

Issue: BMMR (with a focus on Public Health)

Lead Cabinet Member(s): **Cllr Kate Gregory, Cabinet Member for Public Health & Inequalities**

Date response requested:[2] **27 January 2026**

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
1. That the Council clarifies its plan as to how it will lead on developing with system partners a shared understanding of and common approach to addressing local health inequality priorities.	Accepted	The council's commitment to the Marmot approach is being overseen by the HWB, to ensure this is aligned and embedded with other key system agendas. Systemwide partners are working together at a senior level through an advisory board, to agree key areas of focus. The Institute of Health Equity review

[1] Date of the meeting at which report/recommendations were received
[2] Date of the meeting at which report/recommendations were received

		of inequalities, initially focusing on CYP, is driving shared commitment to addressing the identified inequalities, and ensuring this is informed by the experience of residents. In addition, the council are driving a "social movement" approach, promoting, training, and mapping examples of work on health equity. This includes an ambition to build health equity into strategies and services at the start.
2. That the Council devises a relevant metric or metrics to enable it to understand vaping prevalence in the county, to allow it to take informed steps to reduce its harms.	Accepted	That the Council devises a relevant metric to enable it to understand vaping prevalence amongst young people in the county, to allow it to take informed steps to reduce its use amongst young people (acknowledging that smoking is more harmful than vaping and regulated vapes are a NICE recommended method for smokers to quit BUT vaping is not recommended for non smokers)
3. That the Council undertakes a review of the successes and areas for improvement of the Homes for Ukraine scheme to inform the types of support necessary to maximise the chances of arriving families integrating and thriving under Community Sponsorship	Accepted	That the Council undertakes a review of the successes and areas for improvement of the Homes for Ukraine scheme to inform the types of support necessary to maximise the chances of arriving families integrating and thriving under Community Sponsorship (Accepted) The Homes for Ukraine (HfU) scheme enables UK hosts to accommodate Ukrainians in their own homes. Each arrival comes with an integration tariff of £5,900 per person that is paid to local authorities to undertake welfare, DBS and property checks, as well as provide a range of support to help them access services and integrate into the community over an initial 3-year period. This scheme is fundamentally different from the Community Sponsorship (CS) scheme which enables voluntary and community groups to sponsor refugees. There is no

		funding for the local authority as the sponsor group provides the support function, including the provision of suitable accommodation and having to raise £9,000 to support the individual or family over a 2-year period. Local authorities are involved in the checking process to ensure sponsor groups have the appropriate safeguarding and safety processes in place. There have been very few families sponsored under CS nationally, with only 1 family in Oxfordshire – whereas there have been over 3,000 Ukrainians coming to stay in the county. The HfU scheme has highlighted the importance of local authorities being involved in the safeguarding, welfare and property checks, and the need for effective partnership working between central and local government, and between local authorities and the VCS. While CS offers a sustainable model of integration, it requires significant upfront planning, fundraising, and long-term commitment from community groups, as well as system level support from local authorities and other partners for longer-term stability.

This page is intentionally left blank

Overview & Scrutiny Recommendation Response Pro forma

Under section 9FE of the Local Government Act 2000, Overview and Scrutiny Committees must require the Cabinet or local authority to respond to a report or recommendations made thereto by an Overview and Scrutiny Committee. Such a response must be provide d within two months from the date on which it is requested[1] and, if the report or recommendations in questions were published, the response also must be so.

This template provides a structure which respondents are encouraged to use. However, respondents are welcome to depart from the suggested structure provided the same information is included in a response. The usual way to publish a response is to include it in the agenda of a meeting of the body to which the report or recommendations were addressed.

Issue: Parking Permits

Lead Cabinet Member(s): **Cllr Andrew Gant, Cabinet Member for Transport Management**

Date response requested:[2] **27 January 2026**

Response to report:

Enter text here.

[1] Date of the meeting at which report/recommendations were received
[2] Date of the meeting at which report/recommendations were received

Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
1. That the Council recognises the urgent need for improvements in the online parking permit system, and extends the current contract by only one year	Accept	Initial extension has only been agreed for 1 year. There is still the option / ability to extend for a 2^{nd} year if required but it is not the intention to do so.
2. That as part of the early scoping process for the procurement, the Council involves members in reviewing the current system to identify, understand and design-out current flaws	Accept	An appropriate level of stakeholder engagement and independent user tested will be built into the procurement and subsequent system testing process.
3. That the Council prioritises quality and functionality over price in its weighting for the procurement of the new online parking permit system and/or reviews the measures it uses to adjudge quality to make them more reflective of end user experience.	Accept	As per the county council's standard approach currently, contract assessment will be based on 60% quality, 10% social value and 30% price. User experience is a key part of the quality element with assessed user demonstrations.
4. That the Council reviews its CPZ and parking strategy urgently, to allow it to inform the Council's technological requirements	Accept	The enforcement service is engaging with transport policy teams with a view to update countywide parking policy & strategies, including CPZ. Ahead of that, Civil Enforcement Operational Policy is currently being reviewed and will be consulted on. To confirm future contracts will be flexible enough to respond to changes in parking policies and maximise the use of the latest technology to manage and enforce.

Overview & Scrutiny Recommendation Response Pro forma

5. That the Cabinet investigates the viability of enabling trained 'super-users' to check the permit status of a particular car and report it to the Council without violating GDPR	Partially accept	The viability of 'super users' has been investigated from a number of angles, including employment law and user safety. From a data protection perspective, any information processed by a superuser must not indicate offence or give personal information, as this is enforcement data which requires prescribed lawful basis and statutory function for processing. As such providing the status of a particular car is not appropriate. However, there maybe options such as reviewing the status of say 10 cars or providing a direct feed to the council. As it is considered there are benefits to this, the feasibility of this will continue to be investigated.
6. That the Council, if it does not already do so, adopts a policy of writing to non-visitor permit users who do not have e mails to warn them when their permits are shortly to expire.	Accepted	Reviews of existing processes are being undertaken with the plan to improve communication - including implement writing to residents ahead of the permit expiry date for users who are not able to be contacted electronically. The intention is to identify an automated solution to the creation of letters.
7. That the Council works to raise awareness amongst GPs about their role in supporting unregistered carers access parking permits	Accepted	Officers have and will continue to engage with GP's to support this process through the traffic filters/ congestion charge trial and the need to support permit applications. This was met with limited success. We will continue to work with comms team within the council as how to improve engagement with GP's.

This page is intentionally left blank

Overview & Scrutiny Recommendation Response Pro forma

Under section 9FE of the Local Government Act 2000, Overview and Scrutiny Committees must require the Cabinet or local authority to respond to a report or recommendations made thereto by an Overview and Scrutiny Committee. Such a response must be provided within two months from the date on which it is requested[1] and, if the report or recommendations in questions were published, the response also must be so.

This template provides a structure which respondents are encouraged to use. However, respondents are welcome to depart from the suggested structure provided the same information is included in a response. The usual way to publish a response is to include it in the agenda of a meeting of the body to which the report or recommendations were addressed.

Issue: Draft Social Value Policy

Lead Cabinet Member(s): **Cllr Levy, Cabinet Member for Finance, Property and Transformation**

Date response requested:[2] **24 February 2026**

Response to report: Report of Performance and Corporate Services Overview & Scrutiny Committee

Enter text here.

[1] Date of the meeting at which report/recommendations were received
[2] Date of the meeting at which report/recommendations were received

Overview & Scrutiny Recommendation Response Pro forma

Response to recommendations

Recommendation	Accepted, rejected or partially accepted	Proposed action (if different to that recommended) and indicative timescale (unless rejected)
1. That any policy on supporting social value through procurement should form part of a wider policy on generating social value and supporting community wealth building across all the Council's functions, and that the Cabinet should commit to a holistic approach.	Accept	The policy sets the Council’s procurement and commissioning mechanism for delivering wider benefits through contracts, aligned to local priorities and wider corporate commitments. While procurement is one lever among many, the approach supports consistent practice through themed questions, delivery planning, contract management and annual reporting. This provides a foundation that can complement wider place-based and community wealth ambitions across the Council’s functions. A nominated officer (HO Commercial and Procurement) will be placed to lead the linking up of social value across the organisation and with external stakeholders. One action being taken forward is a social value prospectus from the councils service areas. Actions will also be taken to ensure policies such as Community Asset Transfer feature the same themes to give a cohesive approach which can be easily understood by internal and external stakeholders.
2. That in developing and implementing its new social value policy, the Cabinet should draw on the experience of best-practice councils including Durham, Manchester and Preston, as well as the 2023 commissioned report from the Centre for Local Economic Strategies.	Accept	The Council has drawn on external learning in developing the in-house approach and will continue to benchmark and improve over time. This includes that of Durham, Camden and Preston. The policy includes a commitment to periodic review so it remains current with changing legislation, market conditions and local priorities. The revised approach is intentionally streamlined to reduce administrative burden and improve uptake, while maintaining clear expectations and accountability for delivery. Actions on this are to include: Continue horizon scanning and

Overview & Scrutiny Recommendation Response Pro forma

		benchmarking; incorporate learning through periodic review and refreshed guidance.
3. That That the Cabinet considers, when developing a new set of Themes, Outcomes, and Measures (TOMs) for application in Oxfordshire, how these reflect its commitments to putting climate change at the heart of everything it does as well as safeguarding the wellbeing of future generations.	Reject	The Council is not proposing to develop a bespoke TOMs framework. Instead, the in-house approach uses five local priority themes and contract-specific questions, with SMART measures that remain clearly related to the subject matter of each contract and proportionate in application. This provides flexibility to embed climate considerations where relevant, while retaining a practical approach for suppliers and contract managers.
4. That the Cabinet considers how its new social value policy can support delivery of the Council's Local Nature Recovery Strategy.	Accept	The Council can support local nature recovery through the environmental and place-based outcomes that can be sought under the 'Local Area Regeneration' theme, where relevant to the contract. The themes enable service areas to frame questions that reflect local priorities and ensure deliverability through market engagement. This is complemented by the Council's ethical and sustainable procurement requirements, which strengthen expectations on environmental performance across the supply chain. Suppliers will be directed to the LNRS mapping tools and other resources to maintain a localised approach to any delivery.
5. That the Cabinet should set targets and make available to organisations proven, impactful projects which focus on the key priorities the Council would like to address in relation to social value	Partially Accept	The policy establishes five priority themes to provide a consistent framework linking to the strategic priorities of the council, whilst allowing service areas to drill down into more specific, contract-relevant asks through the procurement process. For each qualifying procurement, service areas select two themes to maintain focus. Questions are then developed to suit the contract and the market, supported by pre-market engagement to ensure the ask is deliverable. Suppliers are required to submit a Social Value Delivery Plan with SMART measures, milestones and estimated costs, enabling delivery to be monitored through

Overview & Scrutiny Recommendation Response Pro forma

		contract management and reported transparently. This will be reflected in an annual social value report.
6. That the Cabinet specifically considers the opportunities to support social value through the disposal of land and property and ensure policy is developed around this, especially around Community Asset Transfer.	Reject	The Council recognises the importance of land and property decisions in delivering community benefit. However, the Social Value Policy is designed specifically for procurement and commissioning activity. Opportunities relating to land, property and Community Asset Transfer are best addressed through the appropriate property governance routes, including a new CAT policy which is under development. This policy development has worked closely to mirror the priorities outlined in the social value policy to maintain consistency. Next steps are to ensure links between approaches are reflected through appropriate property governance and policy development routes.
7. That the Cabinet should work alongside fellow anchor institutions in the public (and private sector) to align their procurement policies to maximise social value generation and their collective impact on the wider Oxfordshire economy through their purchasing power.	Accept	The Council supports working with partners and anchor institutions to maximise the collective impact of local spend and delivery. The in-house approach provides a clear, locally aligned framework that can be shared and discussed with partners, whilst ensuring award criteria remain lawful, contract-relevant and proportionate. The Council will continue to progress this through existing partnership routes and will be working pre and post LGR with relevant anchor institutions in shaping the wider social value approach of Oxfordshire.
8. That the Cabinet should work with anchor institutions in the public (and private sector) to adopt a shared understanding of social value and work together to direct contributions to support schemes which have a long-lasting impact on Oxfordshire residents and their communities.	Accept	The themed approach provides a shared structure for social value, while allowing service areas to tailor specific asks to local need and market capability through pre-market engagement. Delivery is secured through Social Value Delivery Plans and monitored through contract management. Where non-delivery persists after remediation, the approach allows for service credits that are ring-fenced and reinvested against the Council’s social value themes, supporting targeted and transparent use of funds. The next steps for building out our relations with anchor institutions include developing clear comms for partners on themes, delivery planning

Overview & Scrutiny Recommendation Response Pro forma

		and reporting; explore options for shared understanding through OIEP and other anchor institutes around Oxfordshire and working on our social value prospectus for exempt contracts from the main social value workflow.
9. That the Cabinet considers having a light-touch set of social value requirements for smaller contracts	Reject	The new approach is already designed to be proportionate. Social value tender weighting applies by default only for procurements above £100,000, with defined exemptions where applying the standard approach would not be appropriate (for example, short-duration contracts and certain VCSE markets). For lower value contracts, officers can still secure appropriate outcomes through contract design and ethical requirements without introducing unnecessary process or cost for smaller suppliers. Ongoing actions will be to embed proportionality and exemptions through guidance and templates and support service areas to apply the approach consistently.
10. That the Cabinet reconsiders the proposed social value weighting which is currently set at the statutory minimum of 10%.	Reject	The proposed weighting of 10% is intended as a proportionate baseline that supports consistent application and reduces barriers to participation, particularly for smaller suppliers, while maintaining appropriate balance with price and quality. This approach was chosen to allow more focus on quality and cost, whilst maintaining excellent social value. Some of the sustainability elements have now been embedded into contract specifications through the ethical procurement policy, allowing for a lower weighting of social value. This will be monitored for supplier uptake and contract management success.
11. That the Cabinet should ensure that its choice of social value measures incentivises inclusive forms of ownership, including co-operatives and social enterprises.	Partial Acceptance	The Council recognises the contribution of social enterprises, co-operatives and SMEs, and the policy supports proportionate application and avoids undue barriers for such organisations. While the Social Value Policy necessarily provides a consistent structure to support improved delivery of social value, the Council's wider social value action plan incorporates ambitions to further

		reduce barriers to entry for VCSEs and SMEs, and to seek routes to ring-fencing specific opportunities for those types of organisations that inherently support the Council's social value ambitions. This is therefore out of the scope for further action under this policy.