AECOM

Oxfordshire Infrastructure Strategy

Stage 2 Project Prioritisation Report

Prepared for the Oxfordshire Leaders Joint Committee

January 2026 (Revised April 2026)

Executive Summary

The Oxfordshire Infrastructure Strategy (OxIS) has been prepared on behalf of the Oxfordshire Leaders Joint Committee (OLJC) to provide a comprehensive understanding of the key strategic infrastructure necessary to support future development to 2050.

The Strategy builds upon previous iterations to align with the Strategic Vision for Sustainable Development, focusing on nine key outcomes that include carbon neutrality, enhanced natural environments, and transformed connectivity. As a high-level strategy, it identifies the critical systems, facilities, and services required to enable long-term growth across the county.

The Strategy functions as both a statement of ambition and a tool for engagement, intended to inform local plans and guide investment priorities for local authorities, government bodies and infrastructure providers.[1]

Responding to Growth

Oxfordshire is planning for substantial growth by 2050, with its population forecast to grow by approximately 221,000 to 250,000 people, a 29% to 33% increase that will see the total number of residents reach one million.

To support this rising population, the Strategy outlines theoretical scenarios projecting between 123,000 and 134,000 additional homes across the county by 2050.

This residential growth is matched by significant economic ambitions, driven by Oxfordshire's role in the Golden Triangle and the Oxford-Cambridge Growth Corridor, with major developments planned, including the UK's first AI Growth Zone at Culham, approximately 400,000 sqm of data centre floorspace in the Science Vale Enterprise Zones and a potential New Town in Heyford Park.

This future development represents a transformative scale of change for the county and a significant infrastructure delivery challenge across sectors.

Key Infrastructure Challenges facing Oxfordshire

With regards to **transport infrastructure,** the Stage 1 Report highlights a significant expansion of services, specifically a 70% increase in rail passenger services and improved calling patterns by 2028 to meet rising demand. Key regional projects such as East West Rail and the Oxford Rail Corridor Phase 2 are essential for enhancing connectivity and supporting planned housing and job growth. Furthermore, the analysis highlights a critical need to address bus depot capacity, which is already operating at capacity due to additional space requirements of transitioning to electric fleets. To support modal shift, the Strategy highlights the important development of Strategic Active Travel Networks (SATN) and the continued rollout of Local Cycling and Walking Infrastructure Plans (LCWIPs) across major settlements.

Energy and digital infrastructure requirements are driven by Oxfordshire's status as a global innovation hub and its net-zero commitments. The Strategy identifies significant electricity network constraints, particularly in Bicester and Oxford City, where connection times currently hinder development. Total electricity demand is estimated to rise by at least 966 MWh by 2050, requiring changes in the energy system that will be further detailed in the upcoming Oxfordshire Local Area Energy Plan (OxLAEP) and related strategic reinforcements to the electricity network that will be set out annually by the

1 Since the publication of the Stage 2 report, the Government has made announcements about the Greater Oxford Development Corporation as well as further funding. More information can be found here: https://www.oxford.gov.uk/news/article/1829/statement-on-greater-oxford-development-corporation and here: https://www.gov.uk/government/news/oxford-cambridge-corridor-to-be-uks-silicon-valley

Distribution Network Operators. Additionally, energy demand from the newly announced AI Growth Zone at Culham and a surge in data centre, which currently totals approximately 637 MW, present challenge to Oxfordshire's energy infrastructure. For digital connectivity, the goal is to achieve 99% gigabit-capable coverage by 2030 while overcoming the heritage-related engineering challenges that have left Oxford City with only 27% full-fibre coverage.

Water and environmental management recommendations focus on resilience against climate change and resource scarcity, with a projected supply-demand deficit of -90 Ml/d by 2045. In terms of wastewater, major upgrades to Oxfordshire's Sewage Treatment Works, including Oxford Sewage Treatment Works, are critical to unlocking planned housing development from 2027 onwards. The Strategy also identifies the Oxford Flood Alleviation Scheme as a priority for protecting existing homes and key transport corridors. Green infrastructure needs are similarly substantial, with a theoretical requirement for over 280 hectares of formal outdoor playing fields and 420 hectares of natural greenspace to support the growing population.

Social and health infrastructure planning is increasingly focused on the needs of an ageing population and rising student numbers. The Strategy estimates that Oxfordshire will require approximately twelve additional 10-form-entry secondary schools and nearly 1,900 additional SEND places by 2050. In healthcare, the focus is on consolidating services into primary healthcare hubs to achieve better efficiencies. Engagement with the ICB has highlighted primary healthcare projects being hindered by reimbursement mechanisms proposed by developers not aligning with national Premises Cost Directions. While there are plans for a major new mental health hospital at Warneford Park, the renewal of Horton General Hospital remains a challenge after a bid for central government funding was rejected. Addressing the £370 million funding gap for this facility is a key concern for maintaining acute care capacity in the north of the county.

Infrastructure Funding Gap

Delivering the necessary infrastructure to support growth from 2025 to 2050 is estimated to cost at least £9 billion in capital alone, excluding ongoing revenue, maintenance, and land costs; of which currently identified secured funding is limited to £1.4 billion, highlighting a remaining funding gap of over £7.6 billion. It is important to note that this funding gap is a gross figure and does not account for future developer contributions, utility company investment, or other funding sources not yet confirmed.

Infrastructure Project Schedule

The Strategy identifies over 550 strategic infrastructure projects required to support future development to 2050. This highlighted the need to undertake a logical, consistent and transparent sifting process to reduce the number of projects for inclusion in the focused prioritisation framework. Chapter 2 provides details on how this process was undertaken.

Following the project sifting, a remaining schedule of 115 projects were taken forward for further consideration through the Prioritisation Framework Multi-Criteria Assessment (MCA). The full list of Infrastructure projects as recorded prior to sifting is included in Appendix A3.

The Strategy has identified a number of key infrastructure delivery dependencies and synergies, including:

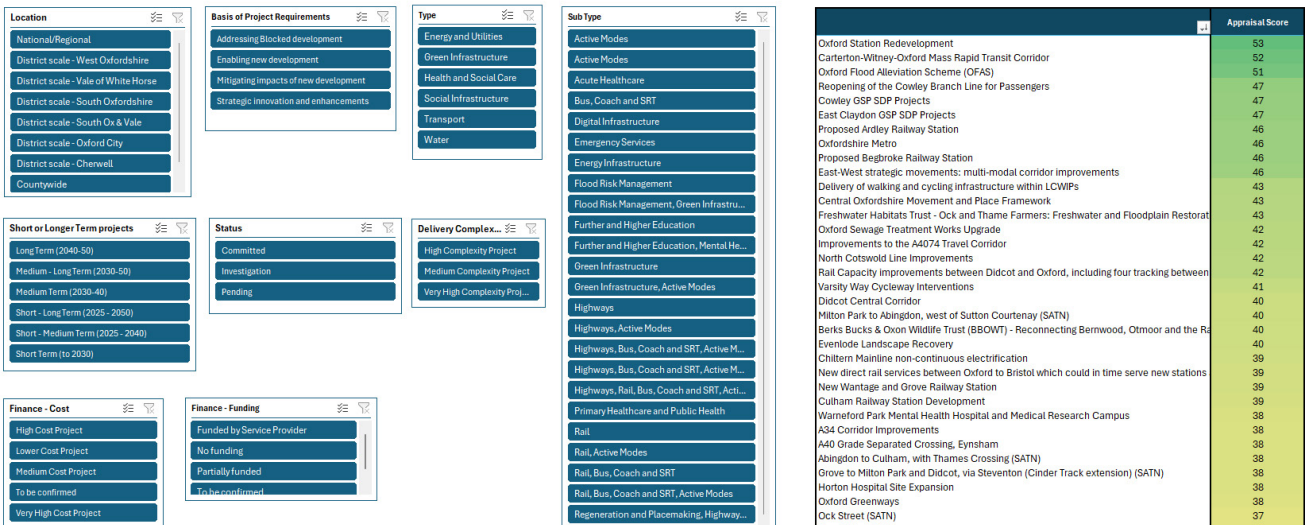
- Oxfordshire's ability to deliver sustainable development depends on addressing electricity network constraints, notably in Bicester and Oxford City, wastewater treatment capacity upgrades, water supply resilience, and improved digital and transport connectivity. These systems are critical foundations for a sustainable future, including enabling grid connections for rail electrification and EVs, unlocking stalled housing schemes, and supporting the economic ambitions for Oxfordshire's innovation ecosystem, including the AI Growth Zone at Culham.
- There are identified cross-sector benefits from delivering an integrated blue and green infrastructure network alongside other sectors' infrastructure investment to address sub-regional greenspace needs and nature recovery. This includes nature-based solutions to flood mitigation and the delivery of active travel networks. Landscape-scale projects such as the Evenlode Landscape Recovery Project and Ock and Thame Freshwater and Floodplain Restoration, as well as countywide active travel network delivery through LCWIPs and SATN, illustrate how coordinated investment can create a resilient blue and green infrastructure network that supports health, biodiversity and climate adaptation. Further opportunities for nature recovery are also identified through Oxfordshire's Local Nature Recovery Strategy.
- Cross-sector and joint infrastructure planning is also critical to help identify delivery interdependencies. For example, the Oxford Flood Alleviation Scheme is critical to reducing flood risk to residential, commercial and strategic transport assets, and enables the reopening of the Cowley Branch Line to passenger services by providing necessary mitigation. This however requires the parallel delivery of the A423 Kennington Improvements to allow flood water to flow back into the Thames. In combination with East West Rail and Oxford Station Redevelopment, this integrated package, alongside key priorities set out in OxRAIL 2040: Plan for Rail, underpins rail-capacity growth and wider connectivity across the Oxford-Cambridge Growth Corridor.
- In addition to opportunities to strengthen Oxfordshire's life sciences sector, including investment in the Warneford Park Mental Health Hospital and Research Campus, there is substantial need to address significant estate, funding and procurement challenges in primary and acute healthcare.
- The Strategy also highlights potential for coordinated infrastructure delivery to support regeneration opportunities in Banbury, Bicester and Oxford West End, as well as ambitions for the Science Vale area.

How to use the Prioritisation Framework Most Effectively

The Prioritisation Framework as developed provides the OLJC and partners with a tool and not just a set of fixed outcomes.

While this Strategy has chosen to present one set of base case outcomes as a demonstration to reflect the balanced score card approach across all themes and criteria, the Framework can be further used to present more refined outcomes according to the thematic, spatial or temporal interest of the user. Utilising the implementation filters, the following focused outcomes can be generated:

- Thematic/Geography – The Project Schedule can be filtered to show one or a group of specified infrastructure types. This would enable the priority infrastructure projects for a specific type to be presented for any scale/geography.
- Project Basis – The Project Schedule is also categorised according to whether these projects unlock stalled development, mitigate impacts of development or are proposed for other reasons (i.e. strategic innovation).
- Project Status and Timing – Categorisation by project status and also the likely delivery timing provide further potential filters. For example, the OLJC and partners can use the Framework to focus on projects grouped as committed and pending short term priorities. Alternatively, the Framework could be used to focus on projects grouped as longer term project currently being investigated.
- Project Finances – Whilst the project finance information held within the OxIS project list requires further development it does contain cost and current funding positions where possible. This provides additional options for framework use to focus attention on project lists according to those with considerable funding challenges or alternatively projects close to fully funded and would require a smaller effort to complete project finances and enable delivery.



Example screenshot of the OxIS Prioritisation Framework Dashboard, illustrating the available implementation filter options

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A1

Glossary
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Stage 2 Prioritisation Framework MCA
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A3

OxIS Full Project Schedule
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01

Introduction

1.1 Introduction

The Oxfordshire Infrastructure Strategy (OxIS) has been prepared on behalf of the Oxfordshire Leaders Joint Committee (OLJC) (formerly the Future Oxfordshire Partnership) to provide a comprehensive understanding of the strategic infrastructure necessary to support future sustainable development to 2050.

It aims to deliver the Strategic Vision for Sustainable Development in Oxfordshire, first published in May 2021 and adopted by all six councils.

The Oxfordshire Leaders Joint Committee (OLJC) is a joint committee of the six councils of Oxfordshire, including:

- Cherwell District Council
- Oxford City Council
- Oxfordshire County Council
- South Oxfordshire District Council
- Vale of White Horse District Council
- West Oxfordshire District Council

This third iteration of the Oxfordshire Infrastructure Strategy builds upon previous versions prepared in 2017 and 2021.

The Strategy functions as both a statement and technical evidence base of Oxfordshire's ambition for sustainable infrastructure development that both enables planned growth but recognises and seeks, where necessary, to mitigate its impacts on the environment. It will form part of the evidence base sitting beneath the Oxfordshire Strategic Vision but will not be a statutory policy document.

This document presents Stage 2 of the OxIS and should be read in conjunction with the Stage 1 Baseline Report.

The Strategy is intended for the following audiences:

Members and officers of Oxfordshire County Council and the five District and City Councils

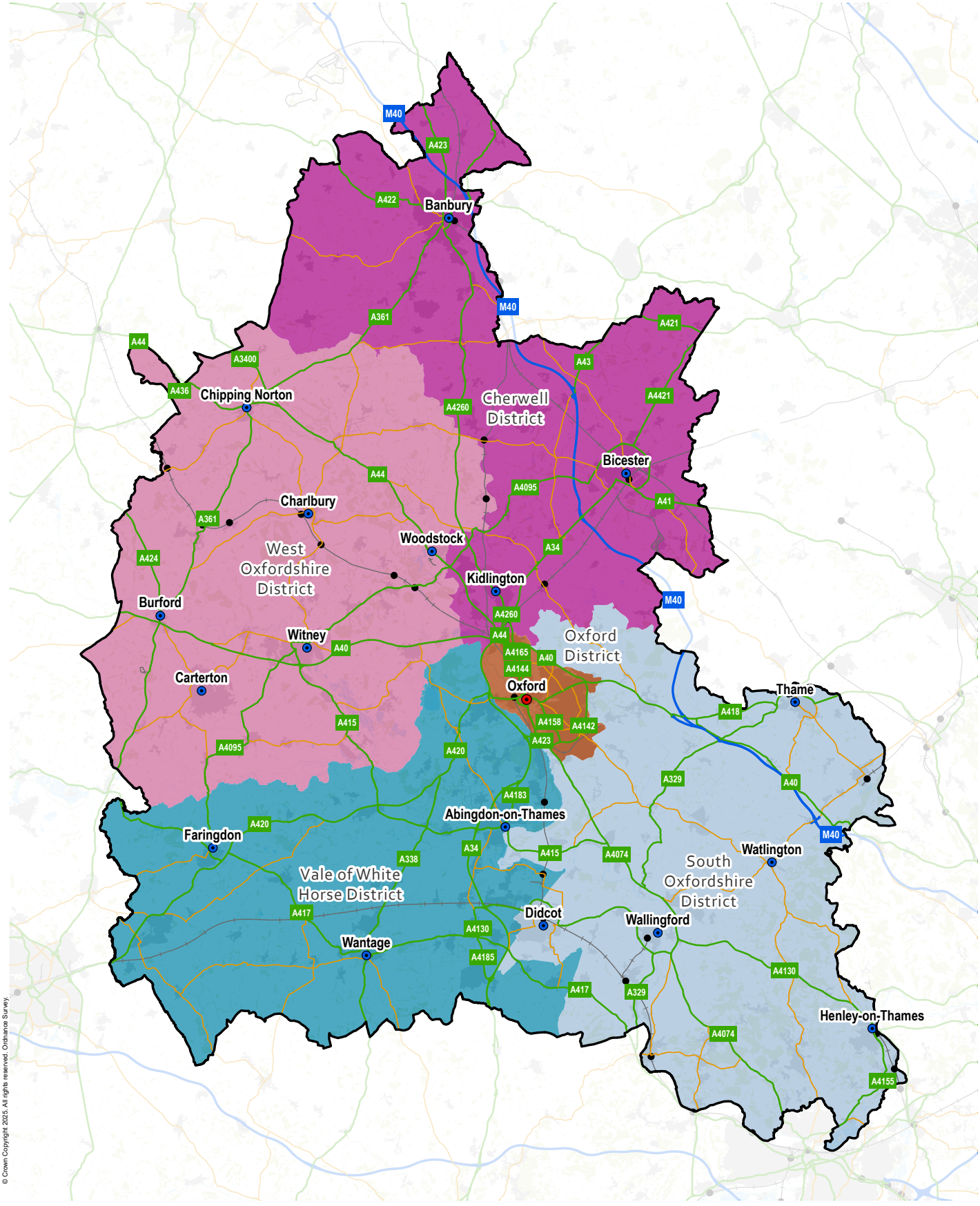
To inform and be informed by individual Local Plans, planning policies, decisions and supporting studies

Government and infrastructure providers

To demonstrate potential infrastructure requirements and their associated delivery and funding opportunities and barriers, and to help ensure a coordinated approach to the delivery of strategic infrastructure across Oxfordshire and in the wider region to 2050 and beyond

Oxfordshire's business community and residents

To inform investment priorities, provide a county-wide view of strategic infrastructure needs, and highlight both the challenges and opportunities associated with infrastructure delivery in Oxfordshire



Legend

- Oxfordshire County Boundary
- City
- Town/Large Village
- Railway Station
- Railway
- Motorway
- A Road
- B Road
- Built Up Area
- Waterbody
- Woodland

Local Authority

- Cherwell District
- Oxford City
- South Oxfordshire District
- Vale of White Horse District
- West Oxfordshire District

NORTH

0 4 8

km

Oxfordshire Infrastructure Strategy Study Area

Note 1: The mapped railway features at Chinnor and Wallingford correspond to the Chinnor & Princes Risborough Railway and the Cholsey & Wallingford Railway, both of which operate as heritage railways providing leisure and tourism services rather than scheduled public transport. Their inclusion is intended solely to reflect the physical infrastructure and should not be taken to imply the availability of regular passenger rail services.

Note 2: The settlement labels shown on this map (City and Town/Large Village) are derived from the Ordnance Survey Towns Data and are provided for mapping reference only. They do not represent formal settlement hierarchy classifications which are determined and reviewed individually through each local planning authority's Local Plan process.

Strategy Scope

The Strategy focuses on six key strategic infrastructure areas and over 20 sub-topics identified by and agreed with the Oxfordshire Leaders Joint Committee, including transport, energy and utilities, green infrastructure, water, social infrastructure, as well as healthcare and social care.

The Strategy applies to all local authorities within Oxfordshire and considers the county in its wider regional context. This includes key interrelationships with neighbouring authorities and strategic geographies such as England's Economic Heartland (EEH) and the Oxford-Cambridge Corridor.

The Strategy does not seek to duplicate existing Infrastructure Delivery Plans prepared to support current and emerging Local Plans. Rather, it focuses on identifying and prioritising infrastructure of strategic importance at the county-wide level.

It sets out strategic infrastructure requirements up to 2050, aligning with the Strategic Vision for Oxfordshire. These requirements are assessed across three time horizons:

- Short term (2025-2030): Immediate infrastructure priorities within the next five years
- Medium term (2030-2040): Emerging infrastructure needs to 2040, aligned where possible with Local Plan periods which ends between 2040 and 2045
- Longer term (2040-2050): Future infrastructure requirements beyond current Local Plan timeframes, looking ahead to 2050

Drawing on comparable studies and stakeholder engagement, this Strategy defines strategic infrastructure as '**critical systems, facilities and services enabling sustainable growth and development across a larger than local area**'.

The following criteria are considered when sifting out non-strategic infrastructure projects:

- If the project is addressing a localised issue, i.e. if the project is addressing an issue which is confined to a single settlement area
- If the project is likely to be directly delivered by developers building a new housing or employment site
- If the project is to enable specific development(s), is likely to be delivered off-site, and wholly funded by developer contributions
- If the project is required as ongoing maintenance or refurbishment of infrastructure
- If the project has a notably small capital cost to deliver

TRANSPORT

Highways

Rail

Bus, Coach and Strategic Rapid Transit

Active Modes

ENERGY & UTILITIES

Energy Infrastructure

Digital Infrastructure

Waste Infrastructure

GREEN INFRASTRUCTURE

Green Infrastructure

WATER

Flood Risk Management

Water Supply

Wastewater Treatment

SOCIAL INFRASTRUCTURE

Secondary Education

Special Education Needs and Disabilities

Further and Higher Education

*For the purposes of OxIS, community facilities are classified as non-strategic infrastructure projects in line with the identified criteria.

HEALTH AND SOCIAL CARE

Primary Healthcare and Public Health

Acute Healthcare

Mental Healthcare

Social Care

Emergency Services

Oxfordshire Infrastructure Strategy Strategic Infrastructure Scope

1.2 Project Methodology

Stage 1 Project Approach

The Stage 1 Baseline Report was produced and published for consultation in August 2025, **and should be read in conjunction with this Report.**

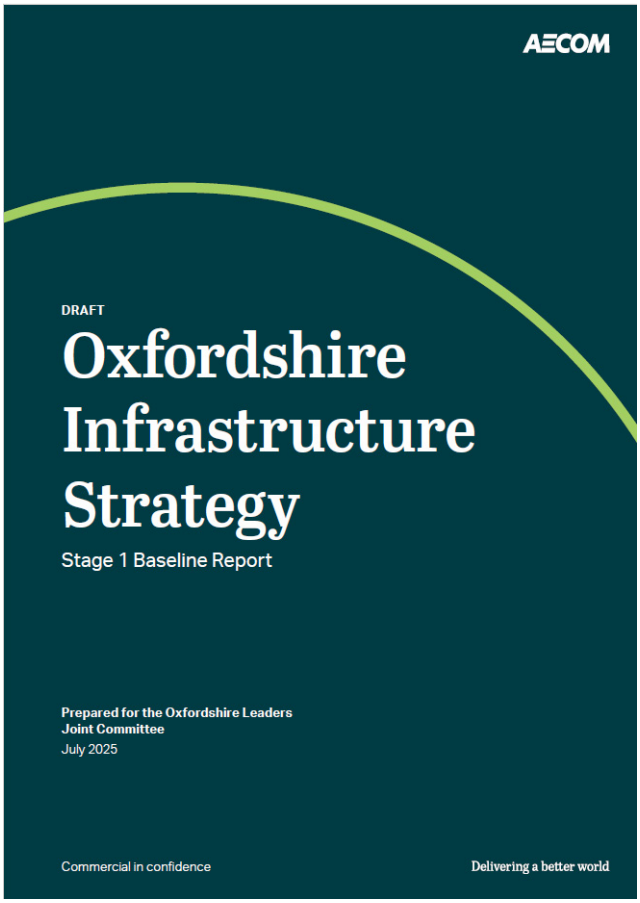
The Stage 1 Baseline Report focused on building a comprehensive understanding of the baseline infrastructure delivery and future strategic infrastructure requirements to support development to 2050, at a County wide level, structured as follows:

- Chapter 2 introduced the study area and sets out the housing and economic growth context in Oxfordshire, including the theoretical growth scenarios that underpin the infrastructure analysis;
- Chapter 3 provided an overview of how infrastructure is planned and delivered across Oxfordshire;
- Chapter 4 presented a topic-by-topic assessment of strategic infrastructure needs across the County, focusing on existing capacity and future strategic requirements to support growth to 2050;
- Chapter 5 summarised the Stage 1 draft Project Schedule which collates infrastructure investments required to support Oxfordshire's growth ambitions, including indicative costs and funding assumptions;
- Chapter 6 explored the potential risks and barriers to delivering infrastructure. These are examined further at Stage 2, along with potential mitigation strategies;
- Chapter 7 outlined the next steps for Stage 2 of this Strategy's development, which will include further refinement of the strategic infrastructure project pipeline and prioritisation of future strategic infrastructure projects through a structured framework.

This phase of work was also informed by a series of thematic Stage 1 Technical Stakeholder Engagement Workshops with over 35 targeted stakeholders.

These focused on validating the defined parameters for strategic infrastructure and strategic baseline findings on key challenges and opportunities.

They were also used to seek stakeholder views on the infrastructure project pipeline to 2050, including committed and planned investments, as well as to facilitate discussion on strategic infrastructure requirements to support growth to 2050 as well as key Drivers of Change which may impact the quantum and type of future requirements.



Stage 1 Technical Consultation

The Stage 1 Baseline Report was published for technical consultation between August 2025 to September 2025 through the AECOM Virtual Consultation Room.

Over 110 technical stakeholders were invited to review and provide feedback on the baseline analysis and initial Project Schedule of strategic infrastructure projects. The report was also made publicly available through the Oxfordshire Joint Leaders Committee website for feedback.

The Stage 1 Technical Consultation generated more than 400 comments from a variety of technical stakeholders including:

- Representatives from each local authority
- Innovate Oxfordshire
- Anglian Water
- Oxford Health NHS Trust
- National Highways
- East West Rail
- Thames Water
- Sport England
- Natural England
- BOB ICB
- Road Haulage Association (RHA)

Headline findings from the consultation are summarised over the following pages.

Strategy Purpose, Structure and Governance

- Strong support for the continued commitment to shaping infrastructure planning and delivery across Oxfordshire with clarity and ambition;
- Suggestion to consider 'Drivers of Change', particularly to reflect the importance of embedding adaptability and innovation in infrastructure investment;
- Suggested opportunity to align OxIS with broader innovation governance initiatives, ensuring future decisions are informed by emerging technologies, behavioural insights, and real-time data;
- Challenges highlighted in planning infrastructure for the 2041–2050 period due to uncertainty around future growth locations.

Need for Infrastructure Prioritisation

- Clear support for the need and overall approach to infrastructure prioritisation;
- Importance of considering the combined impacts of less strategic infrastructure schemes;
- Importance of illustrating critical infrastructure requirements with a sequenced timeline to support future Growth Plans;
- Considering the interrelationships between schemes, including their sequencing, interdependencies and cross-sectoral benefits, to deliver optimal impacts;
- Careful consideration to be given to long term and theoretical projects which may play important roles in enabling OxIS objectives;
- Prioritising infrastructure schemes with most significant impacts in unlocking growth and amplifying national infrastructure investment.

Topic-by-Topic Strategic Infrastructure Assessment

- Recommendation to consider emerging mobility technologies, such as autonomous vehicles, drones and other emerging mobility solutions. Innovate Oxfordshire highlighted its work on AV trials, sensor harmonisation and regulatory learning;
- RHA suggested recognising the local logistics sector as a strategic priority, and recommended planning for ultra-rapid charging infrastructure HGVs, associated grid access improvements and land allocation for lorry parking and motorway service areas;
- Funding for local maintenance was highlighted as a strategic issue, given that a significant proportion of the population will continue to rely on road-based travel by car or public transport;
- Retrofit was identified as a critical infrastructure gap. Although diffuse in nature, it is considered a strategic underpinning to other investments, minimising the need for grid reinforcement and reducing the scale of solar investment required. The PaZCO report references an estimated £1.5 billion investment need;
- Timely grid connection was highlighted as a key challenge to enabling growth;
- Further considerations suggested in relation to the National Grid and UKPN network;
- Electrification of transport infrastructure was highlighted as a key challenge to energy infrastructure;

- Agreement from water supply and wastewater infrastructure providers on the delivery barriers and risks highlighted, particularly in relation to skills and construction, and the water sector's capacity to frontload infrastructure delivery;
- Particular concerns were raised around swimming pool provision, with a need for new facilities or strategic extensions at the regional level identified. Opportunities were also noted to co-locate swimming pool facilities with infrastructure that generates heat, such as data centres and hospitals;
- Health stakeholders supported the production of a comprehensive infrastructure strategy to ensure health infrastructure can be appropriately planned in response to population growth across Oxfordshire;
- Key challenges in primary care were highlighted, including the lack of suitable funding or suitable sites for new or redeveloped GP facilities; complexity of the existing service contract systems within GPs and how GPs are funded by the NHS; and, increasing pressure on services in Banbury, Berinsfield and Eynsham in addition to those identified through the report;
- Improved connectivity for staff and patients, particularly within Oxford and through enhanced bus links, was highlighted as a key enabler of effective health infrastructure;
- Stakeholders expect increasing infrastructure investment focused on improving access to community healthcare including neighbourhood-level health infrastructure, particularly in South Oxfordshire and Banbury, aligning with the NHS Long Term Plan;
- Adult social care requirements, including the provision of bed spaces, were also identified as important. Greater focus was suggested on the role of new infrastructure across all sectors in addressing deprivation and reducing health inequalities;
- A number of additional areas of importance, not currently included within the project scope, have been suggested. These include libraries, parks, leisure centres, museums, sports facilities, the historic environment, housing, and funding for regeneration schemes.

The comments received during the Stage 1 consultation have been addressed and incorporated in the Stage 2 project methodology and report where appropriate. It is acknowledged that some suggestions proposed fall outside the current project scope, and these have been noted for consideration in future work.

Stage 2 Project Approach

Stage 2 of the project encompassed the following tasks which took place between August 2025 to December 2025[1]:

- Technical Consultation of Draft Stage 1 Baseline Report
- Stage 2 Stakeholder Engagement
- Prioritisation Framework Development
- Project Sifting and Prioritisation
- Infrastructure Funding and Delivery Review
- Strategy Development

This document presents the Stage 2, structured as follows:

- Chapter 2 provides an overview of the methodology used to produce the strategy, including the methodology implemented to produce the prioritisation framework;
- Chapter 3 presents the outcome from applying the prioritisation framework, in particular highlighting the priority projects identified at a national/regional scale, at a countywide scale and at the district scale for each local authority;
- Chapter 4 provides an overview of existing infrastructure delivery and funding routes and specifically identifies options that could be explored through the implementation of the OxIS;
- Chapter 5 provides recommendations to the OLJC reflecting the outcomes of the prioritisation framework.

A number of relevant strategies and evidence bases are being or have been developed in parallel with this Strategy for Oxfordshire. The outputs of this study has been shared throughout the strategy development process with key stakeholders including through regular alignment meetings and engagement.

Key strategy and evidence workstreams are summarised below and on the facing page.

Oxfordshire's Local Nature Recovery Strategy (LNRS)

The Oxfordshire Local Nature Recovery Strategy (LNRS) is a tool to help conserve and restore nature across the county. It is part of a wider national ambition to create strategies covering the whole of England to help deliver the 2021 Environment Act.

A series of documents, including a Local Habitat Map, Statement of Biodiversity Priorities, Species Priorities List and a Description of the Strategy, was published in November 2025. These documents describe and map important nature-recovery actions developed through local engagement.

The strategy is intended to act as a tool to help inform decisions about nature recovery actions and help landowners, conservation groups, and local communities to target their coordinated efforts to create a stronger and more connected natural landscape.

1 Since the publication of the Stage 2 report, the Government has made announcements about the Greater Oxford Development Corporation as well as further funding. More information can be found here: https://www.oxford.gov.uk/news/article/1829/statement-on-greater-oxford-development-corporation and here: https://www.gov.uk/government/news/oxford-cambridge-corridor-to-be-uks-silicon-valley

Oxfordshire Local Area Energy Planning (OxLAEP)

The OLJC is supporting the six Oxfordshire councils to develop Local Area Energy Plans (LAEPs) for Oxfordshire. Local Area Energy Planning (LAEP) provides an action plan that takes into account energy and infrastructure plans at the national level. It incorporates technical evidence on the whole energy system, wider non-technical factors, and engagement with stakeholders. Emerging findings from OxLAEP has been considered to date and has continued to inform the development of OxIS across both Stage 1 and Stage 2.

OxRAIL 2040: Plan for Rail

The OxRAIL 2040: Plan for Rail was published in December 2025 by Oxfordshire County Council that sets out a long-term vision for the development of rail across the county. It sits around three key themes including improving connectivity and enhancing infrastructure, climate action, and rail as a place-shaper. The plan sets out how key priority projects such as Oxford Railway Station, the Reopening of Cowley Branch Line to passenger services, East West Rail and new trains will help transform rail travel in Oxfordshire and beyond, supporting improved public transport access to housing and jobs.

Wider government ambitions including the Oxford-Cambridge corridor, the Oxford Growth Commission and the New Towns Programme

In early 2025, ambitions for major investment into the Oxford-Cambridge corridor were announced. The Government aims to anchor fields including AI, life sciences and semiconductors in the Corridor, creating wider investment opportunities across the UK. The Oxford Growth Commission has been established to accelerate the growth potential of Oxfordshire, with a focus upon Oxford and the surrounding areas. The Interim Report of the Oxford Growth Commission was published in December 2025.

In addition, the Government confirmed in September 2025 that it will progress work on a new generation of new towns across England, following publication of the New Towns Taskforce's report, which recommends 12 locations as potential new towns. Redevelopment of the former airbase at Heyford Park in Cherwell is identified as one of the twelve recommended locations and is expected to connect to Oxford and build on the existing progress and commitment to high-quality placemaking, referencing the area's past and supporting its future in innovative technology industries. A New Towns Unit will be established by the government to progress development of the new towns.

1.3 Growth Context

The Stage 1 Baseline Report set out the growth context for Oxfordshire which is summarised here:

Economic growth

The context for economic growth in OxIS is a baseline trajectory that suggests that employment growth could increase by around 100,000 jobs by 2050. These are however high-level estimates to 2050 intended to support long-term infrastructure planning and are not presented as evidence of employment need. Specifically this doesn't mean that emerging or new local plans will plan for this figure, and OxIS does not intend to set binding targets (explicitly or implicitly) for employment or housing growth across Oxfordshire. That is the remit of comprehensive, statutory, local plan process.

Looking to 2050, there is a growing emphasis on sustainable and inclusive economic growth, with a vision that sets the foundational economy gaining prominence alongside high-growth sectors. This shift is supported by the Oxfordshire Strategic Economic Plan and a stronger focus on the infrastructure investment required across transport, digital, water and energy systems to sustain Oxfordshire's position as a globally significant innovation ecosystem.

A resilient and thriving natural environment is also recognised as critical to a functioning economy. Within this context, a Local Nature Recovery Strategy has recently been prepared, and the Oxfordshire Local Nature Partnership is working to enhance nature across the county through innovative financing.

Some of the key growth sectors across Oxfordshire include digital technologies, life sciences, clean energy, advanced manufacturing, defence, and creative industries. AI development and data centres are also a key area of growth. These key growth sectors are associated with a number of key growth sites that are planned or committed across Oxfordshire including the Culham AI Growth Zone, the Begbroke Science Park, and the Didcot Growth Accelerator Enterprise Zone amongst others.

Housing growth

For the purposes of OxIS, three theoretical scenarios were used to estimate housing growth. This work does not replace housing and economic needs assessments. The Growth Scenarios are not indicative of housing need and should not be used or interpreted as such.

These have estimated between **approximately 123,000 and 134,000 additional homes across Oxfordshire by 2050** (annual average of between approximately 4,730 and 5,190 homes). This compares to average annual completions of 3,638 homes per annum (15-year horizon).

The figure overleaf illustrates key committed and planned strategic housing growth across Oxfordshire. These identified housing sites do not equal the total number of homes planned for each local authority, as it is focused on strategic sites, and additionally, not all Local Plans are at a stage where site allocations have been identified or confirmed for inclusion.

Population growth

OxIS-specific housing-led population projections have been modelled based on the three theoretical growth scenarios set out in the Stage 1 Report. These projections estimate **population growth of 221,000 to 250,000 people by 2050** (+29% to +33%), reaching **over 1 million by 2050**.

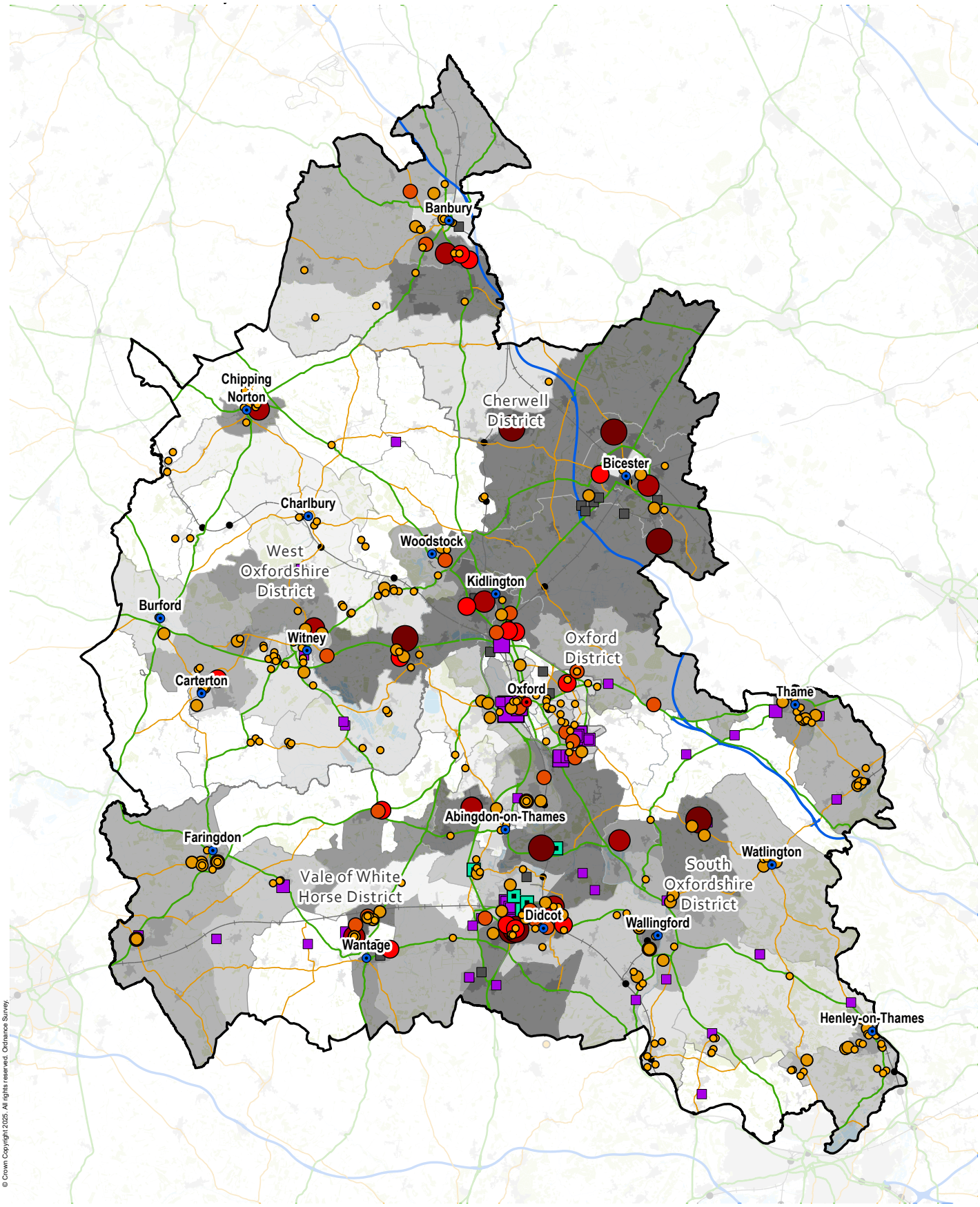
Oxfordshire County Council analysis of 2021 Census data shows a trend of ageing in the county with a 25% increase in the number of people aged 65 and over, and a 27% increase of people aged over 50, while the number of young children aged 0-4 was in decline by 8%. This indicates an ageing population across the County which entails an increasing need for healthcare, social care and age-friendly infrastructure.

+123-134k

Estimated housing growth to 2050 based on theoretical scenarios

+221-250k

Projected population growth based on OxIS housing growth scenarios



Committed and Planned Strategic Housing and Economic Growth across Oxfordshire

Note: The figure illustrates key committed and planned strategic housing and economic growth across Oxfordshire. These identified development sites do not equal the total number of homes or economic floorspace planned for each local authority, as it is focused on strategic sites, and additionally, not all Local Plans are at a stage where site allocations have been identified or confirmed for inclusion.

1.4 Stage 1 Key Findings

TRANSPORT

Key Findings

- Congestion hotspots on A34, A43, M40, Oxford Ring Road and city/ town centres, with improvements necessary on the A40, A420, A41, A44, A4074 and M40/A34
- ORCS identified the need for a **70% increase in passenger services** and calling patterns and service coverage by 2028
- East West Rail presents opportunities for improved regional and national connectivity and increased freight capacity
- All Oxford based bus depots are at full capacity which may hinder network growth going forward
- Existing active travel infrastructure falls short of latest design standards, with **poor walking and cycling links to key destinations** such as rail stations
- Need for inter-urban active travel routes
- Delays to the Road Investment Strategy 3 (RIS 3) programme have created **uncertainty over the delivery of strategic road schemes**, posing risks to meeting long-term capacity needs and aligning transport upgrades with other infrastructure investment and planned growth.
- Realising the benefits of planned and future rail investment will require **coordinated planning for supporting infrastructure,** including interchange hubs, enhanced electricity supply and network reinforcements, and improved digital connectivity such as 5G mobile coverage.

ENERGY & UTILITIES

Key Findings

- Oxfordshire faces **significant constraints on its electricity network**, with exceptionally long connection times for new housing development in Bicester due to the need for reinforcements at the Grid Supply Point (GSP). The SSEN Network Capacity Map indicates that **electrical infrastructure is constrained** in parts of the county, which could **limit development before 2030 until scheduled reinforcement upgrades are completed.**
- Additional demand is anticipated from **Oxfordshire's AI Growth Zone and data centre developments**, reflecting its position as a global innovation hub. There are also **opportunities to capture waste heat** from data centre operations through a whole energy systems approach, for example, by supplying it to nearby housing developments or large heat users via district heating networks.
- Oxfordshire authorities are developing Local Area Energy Plans (LAEP) to shape a coordinated energy transition. Emerging analysis indicates rising electricity demand from rail and heat electrification and increasing battery electric vehicles including bus fleet.
- Only **62% of premises in Oxfordshire currently have access to full-fibre connectivity**, with Oxford City having the lowest coverage (27%) despite its status as a global innovation and economic hub. Most local authority areas in Oxfordshire have **5G coverage below 10%**.

GREEN INFRASTRUCTURE

Key Findings

- A large proportion of Oxfordshire does not meet any of the Accessible Greenspace Standards, with **over 50 urban neighbourhoods identified as areas of concern or priority.**
- There are **no existing publicly accessible green spaces large enough to meet the sub-regional Accessible Greenspace Standard**.
- Significant green infrastructure delivery will be required to support planned and future housing growth in Oxfordshire. While relevant open space and biodiversity requirements can be partially delivered through individual sites, **strategic investments such as the Evenlode Landscape Recovery Project and the Oxfordshire Nature Recovery Fund will be needed to meet sub-regional needs** and enhance connectivity.
- Integrated infrastructure planning presents an **opportunity to maximise the role of green infrastructure in enhancing health and wellbeing outcomes and providing natural** solutions for flood risk mitigation.

WATER

Key Findings

- There are 4,500 properties in Oxford at a 1% or higher annual risk of flooding. This figure could rise to nearly 6,000 by the year 2080 with the predicted effects of climate change.
- By 2050, **7% of properties will be at risk of hydraulic flooding internally from the sewerage system** for up to 1 in 50-year storm event.
- Thames Water forecasts **supply-demand deficit of -90Ml/d by 2045** and may no longer routinely meet potable water demand of non-residential development, such as data centre development, which would require investment in water management.
- Of the 501 waterbodies in the River Thames basin, 94% are at less than good ecological status.
- **77% of Sewage Treatment Works catchments were vulnerable** to the risks of growth and climate change
- There is currently no statutory obligation for infrastructure providers or developers to construct assets aimed at reducing flood risk in already-developed areas. This limits the ability to address **legacy flood risk** issues through planned infrastructure investment.
- There are no further identified **strategic natural flood management (NFM) or nature-based solutions (NBS) projects** in Oxfordshire beyond those already in progress, although partial opportunity modelling has been undertaken.

SOCIAL INFRASTRUCTURE

Key Findings

- Limited long-term projections: Education planning currently **operates on a five-year cycle**, and there are no available projections to estimate infrastructure needs beyond 2027/28.
- **Condition and accessibility of existing facilities:** While much of the projected demand could be met through new developments, there are ongoing challenges relating to the condition of existing school buildings and the adequacy of walking, cycling, and public transport links to them, which will need holistic consideration.

HEALTH AND SOCIAL CARE

Key Findings

- Oxfordshire's **healthcare estate is ageing**, with limited space to expand in response to housing growth or increased staffing needs.
- This is combined with a **significant investment backlog**. A number of existing GP practices are in poor condition, but there is a lack of funding or suitable sites to support redevelopment or provision of a new facility. The ICB also does not have any dedicated funding for new primary care estate development and is faced with **financing and procurement challenges**.
- Primary healthcare services are already under pressure in **Oxford City, Bicester, Didcot, Wantage, Banbury, Berinsfield and Eynsham**.
- The NHS 10-Year Health Plan proposes the introduction of **neighbourhood health centres** to deliver more personalised, community-based care, alongside the creation of neighbourhood service providers to support this new approach to healthcare delivery.
- Opportunities for **world class life sciences and healthcare** infrastructure
- Health and care infrastructure planning in Oxfordshire is **generally focused on the short term**, with some estate strategies not extending beyond the current year. There are currently **no confirmed updates to address longer-term needs** arising from population growth and demographic change.

02

Prioritisation Framework

2.1 Introduction to Framework

This chapter of the Strategy sets out the Prioritisation Framework and specifically the criteria taken into account during this process as part of the second stage of the study.

As has been demonstrated through the Stage 1 Baseline Report, a wide range of infrastructure issues and opportunities exist across Oxfordshire. The Strategy has identified a large number of infrastructure projects required in order to support the economic, social and environmental development of Oxfordshire. As the Strategy is taken forward and used as a tool by the OJLC and its partners, a focus is required on which projects represent a priority in order to:

- Meet the OJLC objectives for OxIS and to align with the Outcomes of the Oxfordshire Strategic Vision
- Identify and promote the infrastructure investment supporting sustainable growth of Oxfordshire
- Demonstrate clear investment priorities to government, the Oxford Growth Commission, and funding providers, having been established through an evidence based process and consulted with stakeholders.
- Extract the most value and efficiencies from limited funding available, in the context of competition for increasingly limited public sector funding and the limitations of developer contributions to fund large scale infrastructure projects.

It should be noted that OxIS is based upon a snapshot in time. As development sites, infrastructure projects and policies continue evolve, more information may become known about projects over time. The assessment of projects and subsequent prioritisation will similarly not be fixed and will continue evolving, but provides a useful reference point to help inform decisions at this point in time. The comprehensive project schedule and GIS mapping generated through this Strategy will provide an invaluable tool for future revisions to infrastructure needs and opportunities across Oxfordshire.

The process has been two staged which will be explained in further detail in this chapter:

1. Project Sifting
2. Multi Criteria Assessment

The development of this process has included a review of the approach employed on previous iterations of the OxIS work in 2017 and 2020 to ensure any lessons learnt have been incorporated. Alongside this, a benchmarking process was undertaken to consider comparable infrastructure strategies and assessments and the prioritisation methods employed on those. Alongside, stage 1 stakeholder engagement feedback on prioritisation was also factored in for consideration.

2.2 Framework Scales

The Strategy has identified a large number of strategic infrastructure projects that are needed to 2050. In order to identify, sift and appraise these projects in a logical way, a set of geographic scales have been employed, to which each of the projects have been assigned. This approach has been adopted from previous OxIS frameworks and is designed so as not to favour one geographical area or project over another. The three scales are summarised here and used to present the outcomes of the approach throughout the remainder of the document.

National/Regional Infrastructure

Projects have been categorised as national or regional where they satisfy one of the following criteria:

- Project is of national or regional importance
- Project crosses through or adjoins Oxfordshire

Countywide Infrastructure

Projects have been categorised as countywide where they satisfy one of the following criteria:

- Project is of countywide importance
- Project crosses more than one local authority within Oxfordshire

District Scale Infrastructure

Projects have been categorised as District scale where they are required to deliver or safeguard specific sites (or group of sites) within a local authority of Oxfordshire.

- Oxford City
- West Oxfordshire
- Cherwell
- South Oxfordshire*
- Vale of White Horse*

** Infrastructure investment covering the Harwell-Milton-Didcot area, along with network-related infrastructure supporting Abindgon and Culham, appears under both South Oxfordshire and Vale of White Horse categories to reflect its cross-boundary relevance.*

2.3 Project Sifting

Project Sifting

The Stage 1 Project Schedule has been reviewed with stakeholders post publication and refined further. This process has led to some projects being removed and other projects being added to the schedule. The review process has enabled further information and details to be recorded although gaps in information remain. At the point of prioritisation the Stage 1 schedule included 550 projects (Appendix A3).

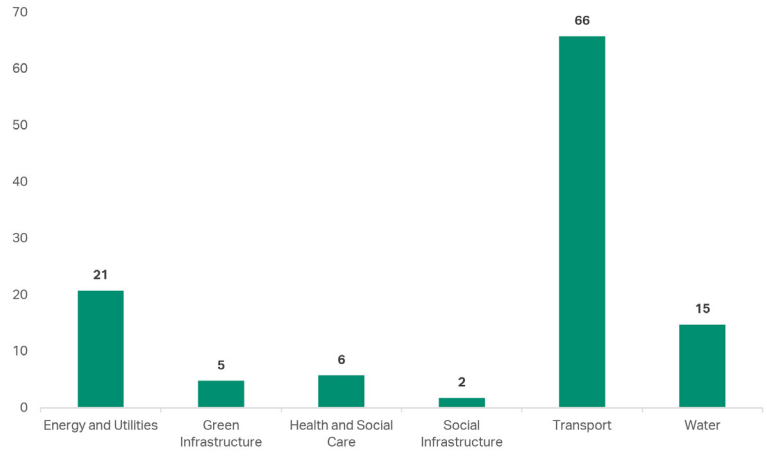
For the purposes of a prioritisation process the project schedule required sifting to enable an appropriate number of projects to be reviewed in more detail. The sifting criteria employed are set out in the table on the following page.

If any projects were categorised to match one of the 'sift out' decisions in the table, these projects were not taken forward to the Multi-Criteria Assessment.

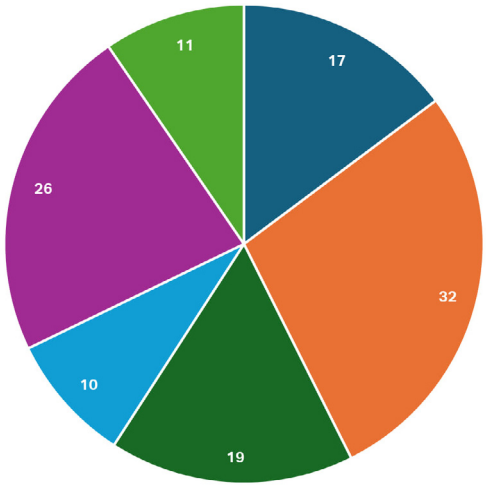
It is important to stress that this does not relegate the importance of these projects and as such they remain important components of the overarching OxIS Project Schedule.

The diagram below illustrates the number of projects sifted through the assessment stage according to project type and scale / geography.

Following the Project Sifting, a remaining schedule of 115 projects were taken forward for further consideration through a Multi-Criteria Assessment (MCA) tool.



Number of projects sifted through the assessment according to project type and scale



- National/Regional
- Countywide
- District scale - Cherwell
- District scale - Oxford City
- District scale - South Ox & Vale*
- District scale - West Oxfordshire

**Including projects in South Oxfordshire (5), Vale of White Horse (14), and cross-boundary infrastructure schemes (7).*

Sifting Categorisation	Considerations	Sift In	Sift Out
Project Scope	Check to exclude projects not within scope of OxIS Prioritisation Framework	• In Scope	• Duplicate • Out of Scope
Spatial Scale	Check to exclude projects not of strategic scale (i.e. Addressing localised issue / directly delivered by developers)	• National/ Regional Scale • Countywide Scale • District Scale	• Non-strategic
Basis of Project Requirement	Check to exclude projects not supporting good growth in Oxfordshire	• Addressing blocked Development • Enabling new development • Mitigating impacts of new development • Strategic innovation and enhancements	• Addressing existing shortfalls • Maintenance or refurbishment
Project Status	Check to exclude projects already in development	• Committed • Pending • Investigation	• Completed • Under construction • Ambition
Cost and Funding Status	Check to exclude projects already fully funded or expected to be funded by development	• No Funding • Partially Funded	• Fully Funded* • Developer Direct Delivery or Contributions
Confidence in Information	To check potential limitations to knowledge and whether additional research is required to improve the basis of categorisation	• Comprehensive Information • Partial Information	• Poor Level of Information • No Information

Sifting criteria used to determine projects taken forward

*This excludes energy and water projects which have a recognised funding route but no clear commitments to funding

2.4 Multi Criteria Assessment

Multi-Criteria Assessments can vary in complexity and this assessment has been designed to be as logical and transparent as possible.

The assessment has been organised under broad themes to ensure a holistic approach and a number of sub criteria to ensure specific elements are incorporated. In compiling these themes and criteria, the Oxfordshire Strategic Vision has been taken into account to ensure alignment as far as possible.

The Strategic Vision Outcomes have influenced the themes and criteria to ensure that the appraisal of projects takes into account the protection of the environment, a carbon neutral / negative future, health and well-being, strengthening of the local economy, fairness and equality, the historic and cultural offer, improved connectivity and the delivery of affordable and efficient homes.

The Oxfordshire Strategic Vision, Future Oxfordshire Partnership (2025)

Themes and Criteria

The MCA Themes include:

- Environment
- Place
- Social
- Productivity
- Connectivity

The MCA Criteria which support each of these themes are set out over the following pages.

All criteria impacts are scored between negative/negligible (0), low positive (1), medium positive (2), high positive (3), and very high positive (4).

The weighting of scores across the five themes is based on a balanced score card approach which represents the broad remit of the OxIS scope and intended objectives of the strategy. Therefore, the importance of one theme is not elevated above another.

The MCA criteria and scoring could be adapted for specific parallel assessment exercises, but the OxIS MCA should be seen as a baseline assessment, from which bespoke prioritisation exercises can be produced for specific purposes using the incorporated implementation filters.

Environment

- E1 - Protecting and enhancing environment and biodiversity
- E2 - Contribution to reduction in emissions
- E3 - Contribution towards climate change resilience
- E4 - Contribution towards sustainable water systems

Place

- Pl1 - Numbers of new homes directly unlocked by the project
- Pl2 - Scale of homes supported by the project
- Pl3 - Contribution towards priority Regeneration and Place Making schemes
- Pl4 - Contribution towards wider infrastructure projects (Unlocking interdependent schemes)

Social

- S1 - Supporting Health and Well-being
- S2 - Supporting access to social and cultural infrastructure
- S3 - Addressing social deprivation and exclusion

Productivity

- Pr1 - Number of new jobs directly unlocked by the project
- Pr2 - Scale of jobs supported by the project
- Pr3 - Contribution towards an inclusive existing economy
- Pr4 - Enabling new/priority economic growth sectors

Connectivity

- C1 - Supporting sustainable connectivity between settlements
- C2 - Supporting sustainable connectivity within settlements
- C3 - Supporting sustainable digital connectivity of Ox-shire
- C4 - Supporting sustainable energy network across Ox-shire

Criteria	Consideration	Score 0	Score 1	Score 2	Score 3	Score 4
Environment						
Protecting and enhancing environment and biodiversity	To what extent could the project positively protect and enhance environment and biodiversity	Negligible	Low	Moderate	High	Very High
Contribution to reduction in emissions	To what extent could the project positively contribute to a reduction in emissions	Negligible	Low	Moderate	High	Very High
Contribution towards climate change resilience	To what extent could the project positively contribute towards climate change resilience	Negligible	Low	Moderate	High	Very High
Contribution towards sustainable water systems	To what extent could the project positively contribute towards sustainable water systems	Negligible	Low	Moderate	High	Very High

Multi-Criteria Assessment Framework - Environment Theme

Criteria	Consideration	Score 0	Score 1	Score 2	Score 3	Score 4
Place						
Numbers of new homes directly unlocked by the project	To what extent could the project have a direct impact in terms of enabling or unlocking housing growth. Based on recorded data on committed and planned development sites linked to an infrastructure project.	<100 Homes	100 - 500 Homes	500 - 1000 Homes	1,000 - 2,500 Homes	>2,500 Homes
Scale of homes supported by the project	To what extent could the project support homes generally across the study area. Informed by GIS spatial analysis based on scale of associated homes for project using GIS analysis of local plan housing sites and proximity to infrastructure projects	<1,000 Homes	1,000 - 2,500 Homes	2,500 - 5,000 Homes	5,000 - 10,000 Homes	>10,000 Homes
Contribution towards priority Regeneration and Place Making schemes	To what extent could the project positively contribute towards supporting or enabling a priority Regeneration and Place Making scheme/s.	Negligible	Low	Moderate	High	Very High
Contribution towards wider infrastructure projects (unlocking interdependent schemes)	To what extent could the project positively contribute towards supporting wider infrastructure projects. This relates to highlighting the importance of interdependent schemes which are necessary in order to allow associated infrastructure projects to take place.	Negligible	Low	Moderate	High	Very High

Multi-Criteria Assessment Framework - Place Theme

Criteria	Consideration	Score 0	Score 1	Score 2	Score 3	Score 4
Social						
Supporting Health and Wellbeing	To what extent could the project positively contribute towards supporting health and wellbeing	Negligible	Low	Moderate	High	Very High
Supporting access to social and cultural infrastructure	To what extent could the project positively contribute towards supporting access to social and cultural infrastructure	Negligible	Low	Moderate	High	Very High
Addressing social deprivation and exclusion	To what extent could the project positively contribute towards addressing social deprivation and exclusion	Negligible	Low	Moderate	High	Very High

Multi-Criteria Assessment Framework - Social Theme

Criteria	Consideration	Score 0	Score 1	Score 2	Score 3	Score 4
Productivity						
Numbers of new jobs directly unlocked by the project	To what extent could the project have a direct impact in terms of enabling or unlocking job growth? Based on recorded data on committed and planned development sites linked to an infrastructure project.	< 100 Jobs	100 - 500 Jobs	500 - 1,000 Jobs	1,000 - 2,500 Jobs	> 2,500 Jobs
Scale of jobs supported by the project	To what extent could the project support jobs generally across the study area. Informed by GIS spatial analysis based on scale of associated jobs for project using GIS analysis of local plan employment sites and proximity to infrastructure projects.	< 1,000 Jobs	1,000 - 2,500 Jobs	2,500 - 5,000 Jobs	5,000 - 10,000 Jobs	> 10,000 Jobs
Contribution towards an inclusive existing economy	To what extent could the project positively contribute towards supporting an inclusive existing economy at the local, regional and or national scale.	Negligible	Low	Moderate	High	Very High
Contribution towards priority economic growth sectors	To what extent could the project positively contribute towards supporting priority economic growth sectors (supporting inclusive and green economy)	Negligible	Low	Moderate	High	Very High

Multi-Criteria Assessment Framework - Productivity Theme

Criteria	Consideration	Score 0	Score 1	Score 2	Score 3	Score 4
Connectivity						
Supporting sustainable connectivity between settlements	To what extent could the project positively support sustainable connectivity between settlements across Oxfordshire and the wider sub region	Negligible	Low	Moderate	High	Very High
Supporting sustainable connectivity within settlements	To what extent could the project positively Support sustainable connectivity within settlements within Oxfordshire	Negligible	Low	Moderate	High	Very High
Supporting sustainable digital connectivity of Ox-shire	To what extent could the project positively support sustainable digital connectivity across Oxfordshire	Negligible	Low	Moderate	High	Very High
Supporting sustainable energy network across Ox-shire	To what extent could the project positively support the sustainable energy network across Oxfordshire	Negligible	Low	Moderate	High	Very High

Multi-Criteria Assessment Framework - Connectivity Theme

Project Appraisals

The appraisal of projects within the MCA is informed through three processes which are explained below:

1. Project typology benchmarking

Benchmarking scores have been developed for all qualitative-based MCA criteria. These benchmarks ensure a consistent approach is applied across projects of the same typology, providing a logical and transparent basis for scoring where project-specific information is limited. In effect, they offer a default fallback position that supports robust and consistent MCA scoring whenever detailed assessments are not yet possible.

2. Project location-based analysis

Six of the criteria have also been informed by GIS based spatial analysis. This is summarised in the table on the following page.

3. Project line-item information review and sense checking

The third process employed for the appraisal was to undertake a sense check and review of the MCA outcomes. This required each project entry and its associated project details to be checked across each thematic criteria consideration and benchmark score. Where GIS spatial analysis or protect details recorded for a project provided evidence to suggest a divergence from the typology based benchmark score this was applied manually.

Theme	Criteria	Project location-based analysis
Environment	Protecting and enhancing environment and biodiversity	Spatial analysis of proximity of infrastructure project to the following sensitive sites: Special Protection Areas, Special Areas of Conservation, RAMSAR, National Nature Reserves, Site of Special Scientific Interest, Ancient Woodland, Priority Habitats, Local Nature Reserves, National Parks, National Landscape
Place	Scale of homes supported by the project	Spatial analysis of planned housing sites from Stage 1. Catchment buffers applied to all applicable infrastructure projects. Analysis records scale of planned homes potentially supported by the infrastructure project. Not assumed to directly unlock sites (different criteria) but to support.
	Contribution towards priority Regeneration and Place Making schemes	Spatial analysis of proximity of infrastructure project to the following regeneration areas: Welch Way (Witney), Banbury, Bicester, Kidlington, Berinsfield Garden Village, Blackbird Leys / Greater Leys, West End and Botley Area, Marston Road and Old Road Area, Cowley Branch Line and Littlemore
Social	Addressing social deprivation and exclusion	Spatial analysis of proximity of infrastructure project to identified communities with high levels of deprivation as defined through 2025 Index of Multiple Deprivation (top 3 deciles)
Productivity	Scale of Jobs supported by the project	As above for Scale of Homes Supported by the Project' but analysis of Stage 1 employment sites to record scale of planned employment sites and associated Jobs supported by project.
	Contribution towards priority economic growth sectors	Spatial analysis of proximity of infrastructure project to the sites associated with Oxfordshire economic growth sectors including for example Upper Heyford Creative City, Motorsport Valley, Oxford City Science Area, Culham AI Growth Zone, Milton Park / Didcot Garden Town, Williams Innovation & Technology Campus, Harwell Campus, Begbroke Science Park, University of Oxford, Activate Learning Campuses, Didcot Growth Accelerator Enterprise Zone

Criteria considered in the location-based analysis

Implementation Filters

Project deliverability is an important consideration but has been separated out from the MCA. This is because many of these factors do not fit a scoring approach in the same way that the thematic criteria of the MCA do and are more subjective as to whether they result in a positive or negative outcome. For example, a project that has a high level of complexity could be scored negatively as the implementation will be challenging but equally the project could be scored positively to attract a greater level of intervention and support.

Instead, the deliverability of the schemes has been grouped alongside other practical categorisations of the projects under an 'implementation' umbrella. The intention being that the Prioritisation Framework includes these implementation filters to allow the outcomes of the MCA to be filtered according to the needs of the user. This enables the framework to be used as a tool to, for example, provide spatially relevant project lists, temporal and status-based lists, or funding related lists. The implementation filters are shown in the table on the following page.

Engagement and Refinement

The development and application of the Prioritisation Framework followed a collaborative process with ongoing involvement from the project steering group, Oxfordshire Local Authorities and OCC service leads. This has followed an iterative process as set out below:

1. Stage 2 Project Schedule refinement following stakeholder engagement at the conclusion of Stage 1
2. Sifting criteria development with the project steering group and application to the draft Stage 2 Project Schedule
3. Sifted project schedule review and finalisation by project steering group, Oxfordshire Local Authorities and OCC service leads
4. MCA core component, including infrastructure scales, assessment themes and criteria, drafted by OxIS Project Team and reviewed by project steering group
5. Infrastructure scales, assessment themes and criteria refinement and finalisation based on feedback from project steering group
6. MCA tool application to the sifted project schedule to generate draft outcomes. Draft MCA outcomes presented to project steering group and shared with Oxfordshire Local Authorities and OCC service leads for review.
7. Project partner's feedback consolidation, review and consistency sense-check undertaken by the OxIS project team
8. Draft MCA outcome presentation within the Stage 2 Report for consideration by the OxIS EOG.

Filters	Consideration	Filter Options
Scale / Location	Filters to focus project list relevant to specific area (useful for district scale basket of projects to differentiate LPAs)	National / Regional
		Countywide
		District scale - Oxford City
		District scale - West Oxfordshire
		District scale - Cherwell
		District scale - South Oxfordshire
		District scale - Vale of White Horse
Project Basis	Filtering projects based on their rationale*	Addressing blocked development
		Enabling new development
		Mitigating impacts of new development
		Strategic innovation and enhancements
Project Status	Filtering projects on the level of existing commitment and readiness to progress forward	Investigation
		Committed
		Pending
		Partially completed
Project Delivery Timeframe	Filtering projects on the envisaged timing of project delivery	Short Term (to 2030)
		Short - Medium Term (2025 - 2040)
		Short - Long Term (2025 - 2050)
		Medium Term (2030 - 40)
		Medium - Long Term (2030 - 2050)
		Long Term (2040 - 2050)
Delivery Complexity & Risks	Filtering projects on the envisaged complexity of project (typology and project specifics based) and potential level of risk	Very High Complexity Project
		High Complexity Project
		Medium Complexity Project
		Low Complexity Project
Finance - Cost	Filtering projects based on the estimated cost of delivery (i.e. selecting low cost projects or alternatively big ticket items)	Very High Cost
		High Cost
		Medium Cost
		Lower Cost
		To be confirmed
Finance - Funding	Filtering projects based on the funding status (focusing on projects in need of assistance to address funding gaps)	Funded by Service Provider
		Partially funded
		No funding
		To be confirmed

Implementation filters

* This assessment is based on high level understanding of each project's scope and assumptions. It should be noted that the identification of scale and spatial distribution of growth should be established through individual Local Plan process. OxIS does not seek to identify growth requirements or locations.

03

Prioritisation Outcomes

3.1 Introduction

This section sets out the results of the prioritisation of strategic infrastructure projects required to support planned growth across Oxfordshire to 2050.

It focuses on projects currently at the planning or investigation stage, where additional intervention may be required to accelerate delivery or unlock future infrastructure provision. The prioritisation methodology is described in Chapter 2.

A total of 115 strategic infrastructure projects were initially appraised. Through further consolidation and grouping of some related projects the final project list as presented in this chapter totals 103 projects.

These have been presented according to the scale of impact (National/Regional, Countywide and District Scale).

For each project, the following information is provided:

- Thematic project scoring based on the multi-criteria assessment framework as summarised in the tables overleaf
- Ranking based on the Multi-Criteria Assessment (MCA) score
- Indicative delivery phasing between 2025 and 2050

It is important to note that the order in which these infrastructure projects are presented reflects only the scores they achieved in the OxIS Multi-Criteria Assessment. This ordering does not necessarily indicate the sequence in which investment should be prioritised. Rather, it provides an evidence-based platform from which future investment decisions can be developed and refined. The recommendations set out within Chapter 5 include guidance on how to use the Prioritisation Framework most effectively.

It is also recognised that specific project impacts may be refined as individual schemes progress through later stages of design and development, which may in turn identify specific enhancement and mitigation opportunities.

Appendix A2 details the full appraisal results of the Oxfordshire Infrastructure Strategy prioritisation framework.

3.2 National and Regional Infrastructure

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth. Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

This grouping comprises projects of national or regional significance, as well as those that pass through or adjoin the County.

The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects*, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Project Spotlight

Enabling Oxfordshire's Growth through Rail including East West Rail and Reopening of the Cowley Branch Line to passenger services

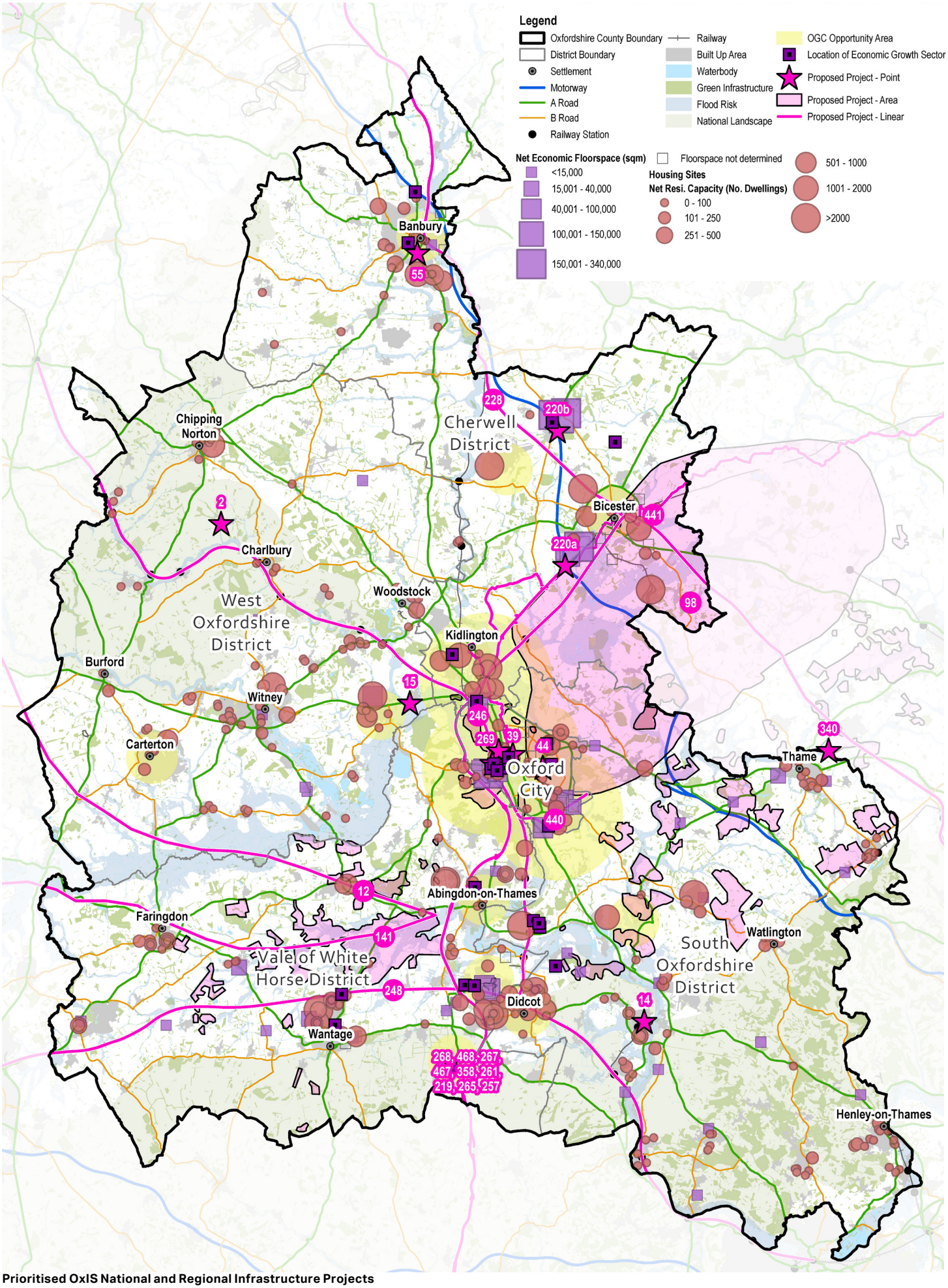
Rail infrastructure is identified as critical to enable growth in Oxfordshire, to drive the regional economy and to connect with other growth locations in the South East.

East West Rail will improve the County's links to Milton Keynes, Bedford and Cambridge and underpin the Government's ambitions for growth across the Ox-Cam Corridor.

Reopening of the Cowley Branch Line to passenger services will increase access to sustainable mobility within and to/from Oxford through construction of new stations at Oxford Littlemore and Oxford Cowley on the existing Cowley Branch Line.

As a priority for OxRAIL 2040: A Plan for Rail, the redevelopment of Oxford Station will increase rail capacity to enable more frequent services, unlock new homes and jobs and is key to the success of other rail projects including, East West Rail and the Reopening of the Cowley Branch Line to passenger services.

*This includes East West Rail and the South East Strategic Reservoir Option (SESRO) Abingdon Reservoir, which are not included in the Stage 2 Sifted Project List owing to their advanced funding position. Further details on these projects are provided in Appendix A3.



Prioritised OxIS National and Regional Infrastructure Projects

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

National and Regional Infrastructure Projects

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
2	Green Infrastructure	**Evenlode Landscape Recovery**			
12	Water	**Severn to Thames Transfer**			
14	Water	**Improvements to Moulsford groundwater source output**			
15	Water	**Development of Oxford Canal - Transfer from Dukes Cut to Farmoor**			
39	Social Infrastructure	**University of Oxford Additional Teaching and Research Facilities**			
44	Health and Social Care	**Warneford Park Mental Health Hospital and Medical Research Campus**			
55	Health and Social Care	**Horton Hospital Site Expansion**			
98	Green Infrastructure	**Berks Bucks & Oxon Wildlife Trust (BBOWT) - Reconnecting Bernwood, Otmoor and the Ray (RBOR)**			
228	Transport	**Chiltern Mainline non-continuous electrification**			
246	Transport	**North Cotswold Line Improvements**			
248	Transport	**New direct rail services between Oxford to Bristol which could in time serve new stations along the line**			
269, 324	Transport	**Oxford Station Redevelopment**			
340	Green Infrastructure	**Thame to Haddenham Greenway**			
440	Transport	**Reopening of the Cowley Branch Line for Passengers**			
441	Transport	**Varsity Way Cycleway Interventions**			
220a	Transport	**M40 Improvements: Safety and Capacity Improvements at Junction 9 Wendlebury Interchange**			
220b	Transport	**M40 Improvements: Safety and Capacity Improvements at Junction 10 Padbury Roundabout and Banyards Green roundabout**			
268, 468, 267	Transport	**A34 Corridor Improvements**			
141	Green Infrastructure	**Freshwater Habitats Trust - Ock and Thame Farmers: Freshwater and Floodplain Restoration Landscape Recovery**			

Project Spotlight

Warneford Park Mental Health Hospital and Medical Research Campus

Development of a world class, state-of-the-art medical research campus focused on mental health at the Warneford Hospital site in Headington. This includes a new mental health hospital which will provide Warneford Hospital in modern form and consolidation of other mental health wards in Oxford City; a new home for the University of Oxford Department of Psychiatry and other related academic disciplines, with additional space for biotech, pharmaceutical and start up companies; and a new graduate college for the University of Oxford focused on medical sciences, bioengineering and related disciplines.

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
4	2	4	4	0	1	2	1	3	3	2	0	0	3	3	2	2	0	1	40
0	0	4	4	0	4	0	0	0	0	0	0	4	0	1	0	0	0	1	18
0	1	3	4	0	4	0	0	0	0	0	0	0	0	1	0	0	0	1	14
0	0	4	4	0	4	0	0	0	0	0	0	4	0	1	0	0	0	1	18
1	0	2	2	3	1	3	0	2	3	1	3	1	2	4	0	1	3	2	36
1	1	2	1	1	1	4	0	4	3	3	1	1	3	4	0	1	2	2	38
1	0	2	1	0	4	4	0	4	3	2	0	2	3	4	0	1	2	2	38
4	2	4	4	0	3	2	1	3	3	2	0	0	3	1	2	2	0	1	40
1	3	2	1	0	4	3	3	2	2	0	0	4	2	4	3	1	1	2	39
1	3	2	1	0	4	3	3	2	2	2	0	4	2	4	3	1	1	2	42
1	3	2	1	0	4	3	0	2	2	2	0	4	2	4	3	1	1	2	39
0	3	2	0	3	4	4	4	2	3	2	4	4	3	4	4	3	1	1	53
3	3	3	2	0	0	3	2	3	2	0	0	0	2	1	3	4	0	1	34
1	3	2	1	4	1	3	3	2	2	3	4	4	2	3	2	2	1	2	47
2	3	1	1	0	4	3	3	3	2	0	0	4	2	3	2	4	1	1	41
0	0	0	0	4	2	1	2	0	1	0	0	3	1	1	1	1	1	0	18
0	0	0	0	3	1	1	2	0	1	0	0	3	1	1	1	1	1	0	16
1	3	2	0	2	4	2	3	3	1	2	0	4	1	3	3	1	1	0	38
4	3	4	4	0	3	2	1	3	3	2	0	0	3	3	2	2	0	1	43

Project Spotlight

Freshwater Habitats Trust - Ock and Thame Farmers: Freshwater and Floodplain Restoration Landscape Recovery

A landscape recovery project to deliver landscape-scale restoration and connect the Freshwater Network across the Ock and Thame lowland catchments. The project supports climate resilience, enhances protected environmental sites and strengthens biodiversity, while also supporting sustainable food production. The project spans 8,500 hectares of farmland, arable and pastures, including 5,000 hectares of floodplain and ten protected sites.

3.3 Countywide Infrastructure

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth. Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

This category comprises projects of countywide significance and those that cross more than one local authority area.

The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Project Spotlight

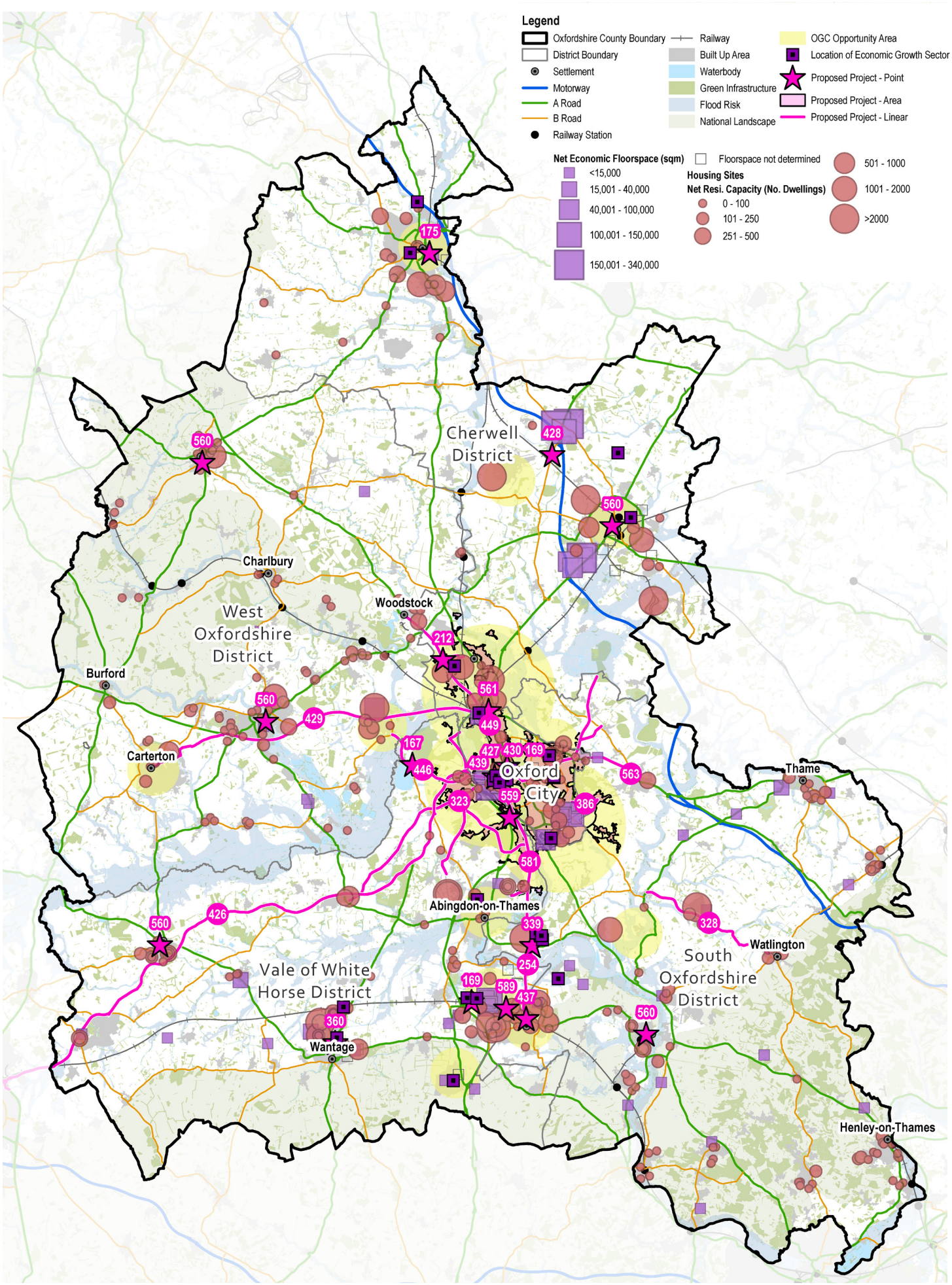
Energy infrastructure as critical foundation for Sustainable Growth

SSEN is developing Strategic Development Plans (SDPs) for key Grid Supply Points (GSPs) including Cowley and East Claydon to map future network needs for net zero, integrating local plans and the Oxfordshire Local Area Energy Plan (OxLAEP) to guide investment in new infrastructure for increased demand from homes, jobs, and energy generation across Oxfordshire.

Project Spotlight

Oxfordshire's Local Cycling and Walking Infrastructure Plans

Oxfordshire's LCWIPs serve as strategic blueprints to transform active travel across the county, as part of the Local Transport and Connectivity Plan. Several LCWIPs have been adopted or are in final development stages including Oxford, Bicester, Kidlington, Abingdon, Witney, Thame, Banbury, Didcot, Carterton, Chipping Norton and Woodstock. The LCWIPs are critical enablers for sustainable growth locations across the County.



Prioritised OxIS Countywide Infrastructure Projects

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

Countywide Infrastructure Projects

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
1	Water	**Oxford Flood Alleviation Scheme (OFAS)**			
17	Water	**Oxford Sewage Treatment Works Upgrade**			
167	Energy and Utilities	**Proposed new Farmoor GSP**			
169	Energy and Utilities	**Low Carbon Hub - Solar Rooftop Pipeline**			
170	Energy and Utilities	**Mobile Digital Twin Platform**			
175	Transport	**Improvements to Banbury Station**			
212	Transport	**Proposed Begbroke Railway Station**			
254	Transport	**Rail Capacity improvements between Didcot and Oxford, including four tracking between Radley and Oxford**			
323	Green Infrastructure	**Oxford Greenways**			
328	Transport	**B480 improvements for buses, pedestrians and cyclists**			
339	Transport	**Culham Railway Station Development**			
360	Transport	**New Wantage and Grove Railway Station**			
386	Transport	**Improving NCN57 between Horspath and Littleworth**			
426	Transport	**A420 Corridor Improvements**			
427	Transport	**Oxfordshire Metro**			
428	Transport	**Proposed Ardley Railway Station**			
429	Transport	**Carterton-Witney-Oxford Mass Rapid Transit Corridor**			
430	Transport	**Delivery of walking and cycling infrastructure within LCWIPs**			
437	Transport	**Didcot Parkway Station upgrades, including additional platform and grade separation south of the station**			
439	Transport	**The Electrified Railway: A zero-carbon railway for Oxfordshire**			
446	Transport	**Eynsham to Botley Community Path Walking and Cycle Route via B4044**			
449	Transport	**A40-A44 Link Road**			
559	Transport	**A423 Kennington Improvements**			
560	Health and Social Care	**Oxfordshire Fire and Rescue Service Improvements: Creation of 5 day shift stations through existing on-call stations at Bicester, Chipping Norton, Faringdon, Wallingford or Crowmarsh and Witney**			
561	Health and Social Care	**Oxfordshire Fire and Rescue Service Improvements: New Fire Station at north of Oxford**			
450, 453, 454	Energy and Utilities	**Cowley GSP SDP Projects**			
499, 523, 524	Energy and Utilities	**East Claydon GSP SDP Projects**			
563	Transport	**Wheatley to Oxford (SATN)**			
581	Transport	**Abingdon to Oxford via Radley and Kennington (SATN)**			
589	Energy and Utilities	**New Didcot GSP**			

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
4	2	4	4	0	1	4	4	3	2	2	3	4	2	4	1	3	0	2	51
2	1	3	4	4	4	3	3	2	0	2	4	3	1	4	0	0	0	1	42
1	3	3	0	0	4	0	4	0	0	0	1	3	1	3	2	2	2	4	33
1	4	3	1	0	1	2	1	2	1	3	0	1	2	2	0	0	0	4	30
0	1	1	1	0	0	1	1	0	1	1	0	0	1	1	1	1	3	1	16
0	3	1	0	0	3	3	3	1	2	2	0	2	2	3	2	2	1	1	33
1	3	1	1	3	1	4	3	2	3	1	4	3	3	4	3	2	1	1	46
1	3	2	1	0	4	3	3	2	2	2	0	4	2	4	3	1	1	2	42
3	3	3	2	0	2	3	1	3	2	3	0	0	2	1	2	4	0	1	38
0	3	1	0	0	2	2	2	2	2	3	0	2	3	3	3	3	1	2	36
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1	3	1	1	0	2	1	4	2	3	1	3	1	3	4	3	2	1	1	39
2	3	1	1	0	0	0	1	4	2	2	0	0	3	2	2	4	1	1	32
1	3	2	0	2	4	2	3	3	1	1	0	4	1	2	3	1	1	0	36
0	4	2	0	0	4	3	2	3	3	3	0	4	3	3	3	3	1	2	46
1	3	1	1	4	3	1	4	2	3	1	4	2	3	4	3	2	1	1	46
1	4	2	1	4	3	4	1	3	3	3	0	3	4	4	4	2	1	2	52
2	3	1	1	0	4	3	2	4	2	3	0	1	3	3	2	4	1	1	43
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0	1	2	1	0	4	1	0	3	1	0	0	4	1	1	0	0	0	0	20
0	3	3	0	4	4	3	4	0	0	2	4	4	1	4	2	2	2	4	47
0	3	3	0	4	4	3	4	0	0	2	4	4	1	4	2	2	2	4	47
2	3	1	1	0	0	0	1	4	2	3	0	0	3	2	2	4	1	1	33
2	3	1	1	0	2	0	1	4	2	3	0	1	3	2	2	4	1	1	36
1	3	3	0	1	4	0	4	0	0	0	2	4	1	4	2	2	2	4	37

3.4 District-Scale Infrastructure

Oxford City

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth at the city scale in Oxford City. This category covers strategic projects beyond those considered in detail through existing and/or emerging Infrastructure Delivery Plans.

Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Project Spotlight

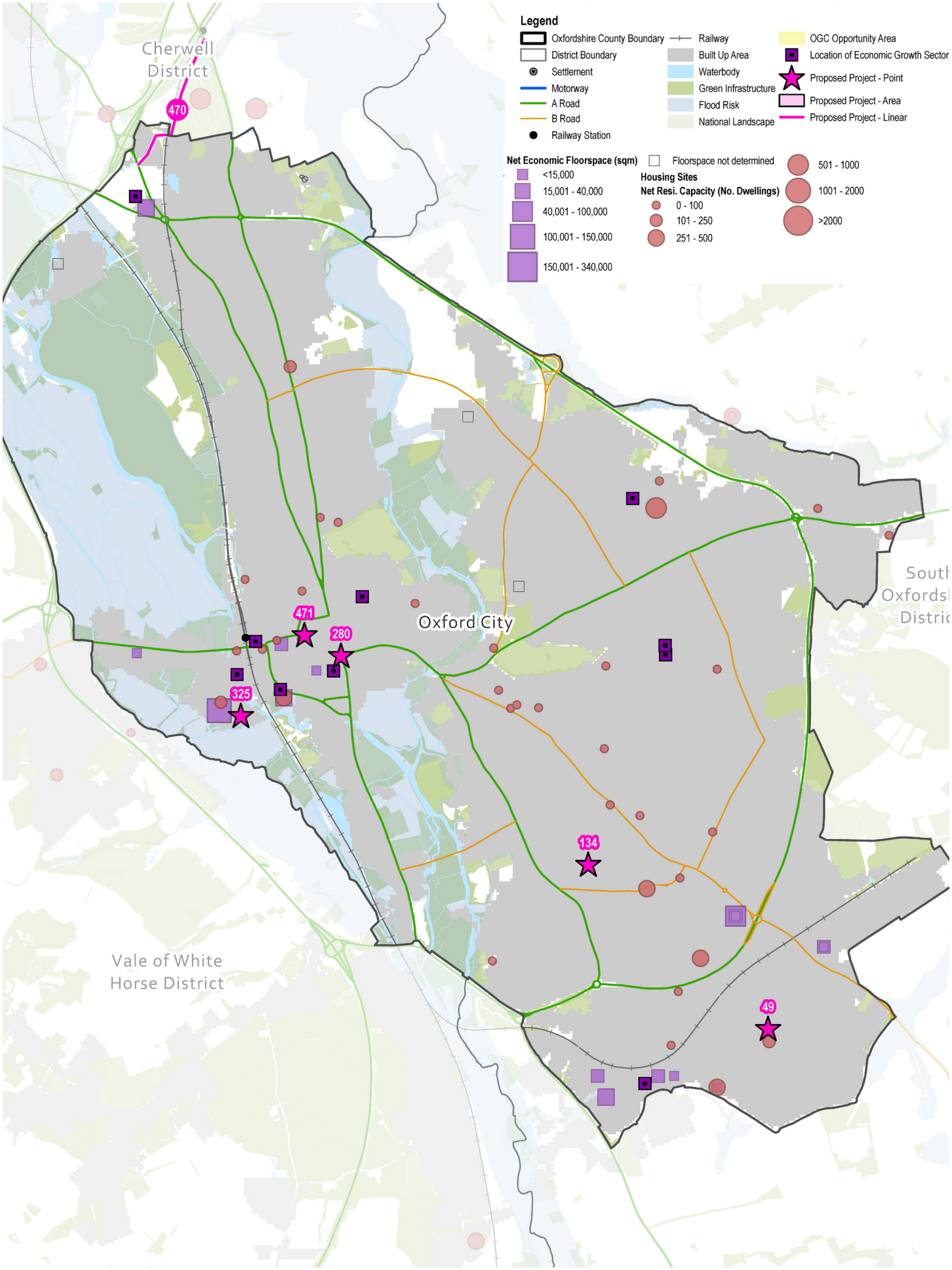
Oxford Flood Alleviation Scheme

Delivery of a two-stage channel within the floodplain west of Oxford to improve water flow and reduce flood risk to developed areas. The scheme will create a new stream and wetland corridor, spanning approximately 5 km from north of Botley Road to the River Thames south of the A423 Kennington Railway Bridge. It adopts a nature-based design, delivering over 20 hectares of new wetland habitat and 16 hectares of floodplain meadow, linking existing wildlife sites.

The scheme will reduce the risk of flooding to over 1000 residential and commercial properties, 3 schools, health and community centres, plus water, electricity and telecommunications infrastructure. Estimated damages avoided over the life of the scheme are over £1.8billion. Delivery of the scheme will also enable reopening of the Cowley Branch Line to passenger services by flooding mitigation.

The parallel delivery of the A423 Kennington Improvements along the scheme is critical, as the new bridge design allows flood water to flow back into the Thames.

As of May 2025, the Secretary of State has approved the Compulsory Purchase Order enabling procurement of land needed for the project. Planning application of the project has been approved subject to the S106 legal agreement between the Environment Agency and the Council. Upcoming stage of the project includes Full Business Case to be approved by HM Treasury. The project has been identified as part of the UK infrastructure Pipeline.



Prioritised OxIS District-Scale Infrastructure Projects (Oxford City)

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

District-Scale Infrastructure Projects (Oxford City)					
No	**Infrastructure Type**	**Project**	**2025-2030**	**2031-2040**	**2041-2050**
49	Health and Social Care	**South City Community Healthcare Hub**			
134	Water	**Lye Valley Catchment Flow Reduction and Florence Park SuDS**			
280	Transport	**Central Oxfordshire Movement and Place Framework**			
325	Transport	**Provision of a pedestrian and cycle bridge from Oxpens to Osney Mead**			
470	Transport	**Oxford North / Oxford Parkway Pedestrian and Cycle Route**			
471	Energy and Utilities	**Oxford Heat Network**			

Project Spotlight

Oxford Sewage Treatment Works Upgrade

The Oxford Sewage Treatment Works is undergoing a major upgrade to deliver a significant increase in treatment capacity, larger storm tanks, and a higher quality of treated effluent discharged to the river. This will enable the works to accommodate population growth projections to 2040, including previously stalled housing schemes. Phases 1 and 2, focusing on inlet works improvements and process optimisation, commenced in January 2026 and are currently progressing.

A key project risk identified relates to inadequate power capacity on site to support the STW upgrade. Thames Water has confirmed that upgrades to both National Grid and SSE electricity network infrastructure will be critical. Stakeholders are currently exploring interim additional power supply options ahead of the main power upgrade works, while also seeking to mitigate the risk of delayed delivery of the additional power required for Phase 4 of the project.

Further investigations into the additional infrastructure investment required beyond 2040 are ongoing. Thames Water will also be producing a long-term strategic plan to 2075 for the Sewage Treatment Works.

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
1	1	1	1	0	0	4	0	3	3	4	0	1	3	2	0	0	1	1	29
3	0	4	4	0	0	1	0	2	1	2	0	0	2	1	0	1	0	0	23
2	3	2	1	3	1	4	1	2	4	2	0	4	3	2	0	4	1	1	43
2	3	1	1	0	0	0	1	4	2	0	0	2	3	2	2	4	1	1	31
2	3	1	1	0	0	3	1	4	2	0	0	3	3	3	2	4	1	1	36
0	4	3	1	0	4	3	0	1	0	3	0	4	2	3	0	0	0	4	33

Growth Area Spotlight

Oxford West End

Oxford's West End is one of the most significant city-centre regeneration opportunities in the UK. Comparable in scale and ambition to King's Cross, Cambridge's CB1 and Bristol's Temple Quarter, it has the potential to deliver more than 5.3 million sq ft of commercial space, over 800 new homes, around 2,500 construction jobs, 14,000 direct new jobs and at least £7.8bn in additional GVA for the UK.

Key infrastructure projects supporting Oxford West End include:

- Oxford Station Redevelopment
- Central Oxfordshire Movement and Place Framework
- Botley Road bus and cycle enhancements
- The Energy Systems Accelerator
- Oxford Flood Alleviation Scheme
- Delivery of Core Traffic Schemes (including Traffic Filters)
- Oxpens River Bridge

Cherwell

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth at the district scale in Cherwell. This category covers strategic projects beyond those considered in detail through existing and/or emerging Infrastructure Delivery Plans.

Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

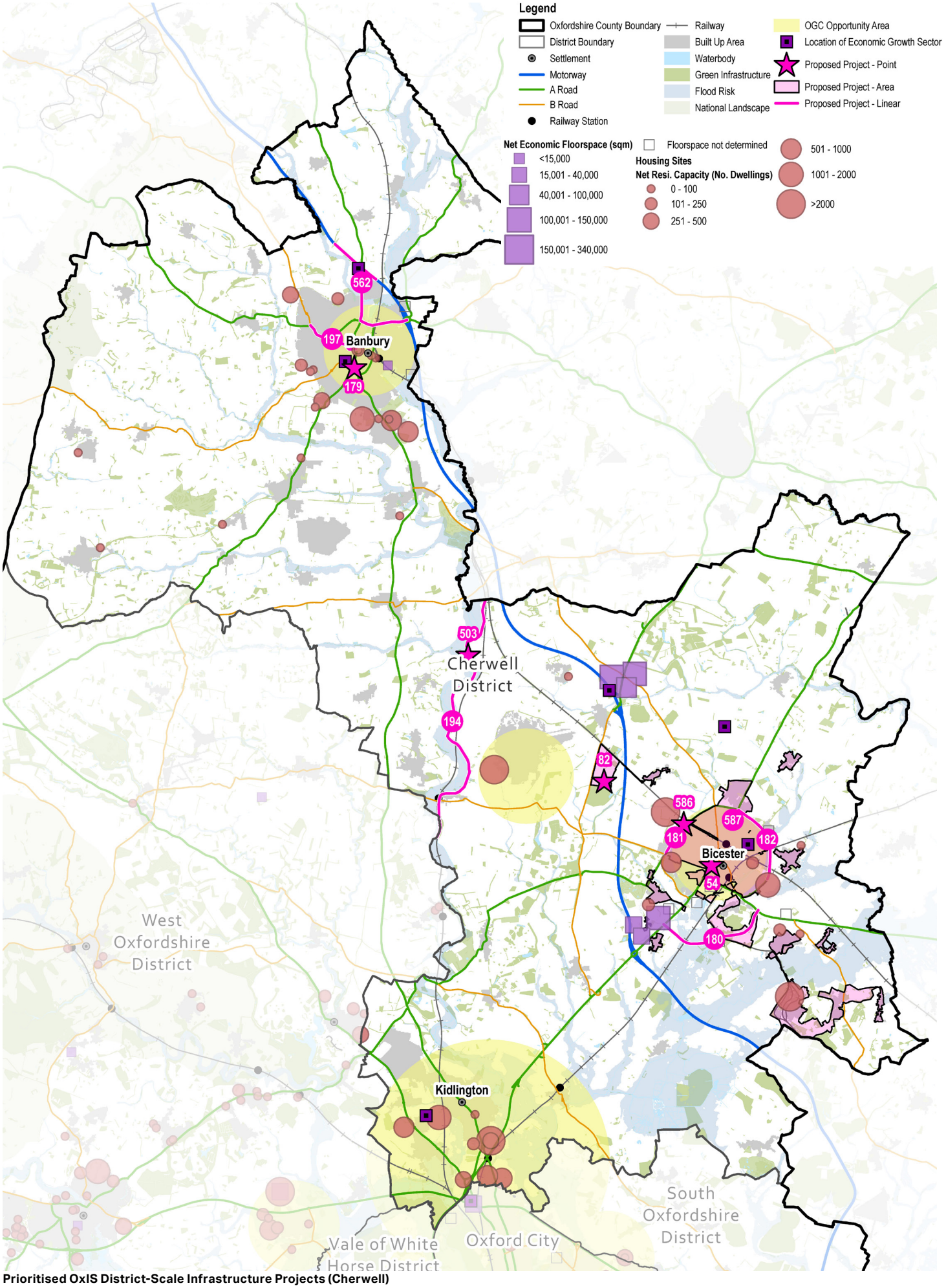
The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Growth Area Spotlight

Bicester Growth

A number of key infrastructure projects featured in the Countywide and District Priority lists are required to support substantial growth at Bicester including:

- Bicester Sewage Treatment Works
- Bicester Community Hospital Extension
- Extension of North West Bicester District Heating Network
- Highway capacity improvements (peripheral routes, southern corridor, and eastern corridor).



Prioritised OxIS District-Scale Infrastructure Projects (Cherwell)

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

District-Scale Infrastructure Projects (Cherwell)					
No	**Infrastructure Type**	**Project**	**2025-2030**	**2031-2040**	**2041-2050**
54	Health and Social Care	**Bicester Community Hospital Extension**			
82	Energy and Utilities	**Extension of North West Bicester district heating network and potential connection to Ardley ERF**			
179	Transport	**East-West strategic movements: multi-modal corridor improvements**			
180	Transport	**A41 Highway capacity improvements to southern corridor (Bicester South East Perimeter Road)**			
181	Transport	**Highway capacity improvements to peripheral routes in Bicester area**			
182	Transport	**Highway capacity improvements to eastern corridor around Bicester**			
194	Green Infrastructure	**River Cherwell Waterway Park**			
197	Transport	**East-west strategic movements: Warwick Road Corridor**			
503	Water	**Cherwell Natural Flood Management**			
562	Transport	**Banbury Access to the Strategic Road Network**			
586	Transport	**A4095 SLR Howes Lane**			
587	Water	**Bicester Sewage Treatment Works**			

Growth Area Spotlight

Banbury Growth

A number of key infrastructure projects featured in the Countywide and District Priority lists are required to support substantial growth at Banbury including:

- East Claydon GSP SDP Projects (energy capacity)
- Improvements to Banbury Station
- East-West strategic movements: Multi-modal Corridor improvements
- East-west strategic movements: Warwick Road Corridor
- Banbury Access to the Strategic Road Network
- Horton Hospital Site Expansion

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
1	0	2	1	0	2	3	0	3	3	2	0	2	3	3	0	1	1	1	31
0	4	3	1	0	3	2	0	1	0	1	0	4	2	1	0	0	0	4	27
2	3	2	1	4	3	3	3	2	3	3	0	0	3	2	2	4	1	2	46
1	0	0	0	4	3	2	3	0	1	2	0	3	1	2	1	1	1	0	26
1	0	0	0	4	3	2	3	0	1	0	0	2	1	2	1	1	1	0	22
1	0	0	0	4	3	2	3	0	1	0	0	0	1	2	1	1	1	0	20
3	1	3	3	0	1	2	1	3	2	2	0	0	2	0	2	3	0	1	31
1	0	0	0	4	2	1	3	0	1	2	0	0	1	2	1	1	1	0	21
3	2	4	4	0	2	1	2	2	1	0	0	0	2	0	0	1	0	0	25
0	0	0	0	4	2	1	2	0	1	2	0	0	1	1	1	1	1	0	18
1	0	0	0	4	3	1	0	0	1	0	4	2	1	2	1	1	1	0	22
2	1	3	4	4	3	2	0	2	0	1	4	3	0	2	0	0	0	1	33

South Oxfordshire

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth at the district scale of South Oxfordshire. Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

Cross-boundary infrastructure investment associated with the Harwell-Milton-Didcot area, as well as network-based infrastructure serving Abingdon and Culham are presented collectively for both South Oxfordshire and Vale of White Horse.

This category covers strategic projects beyond those considered in detail through existing and/or emerging Infrastructure Delivery Plans.

The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Project Spotlight

Great Western Park Health Centre

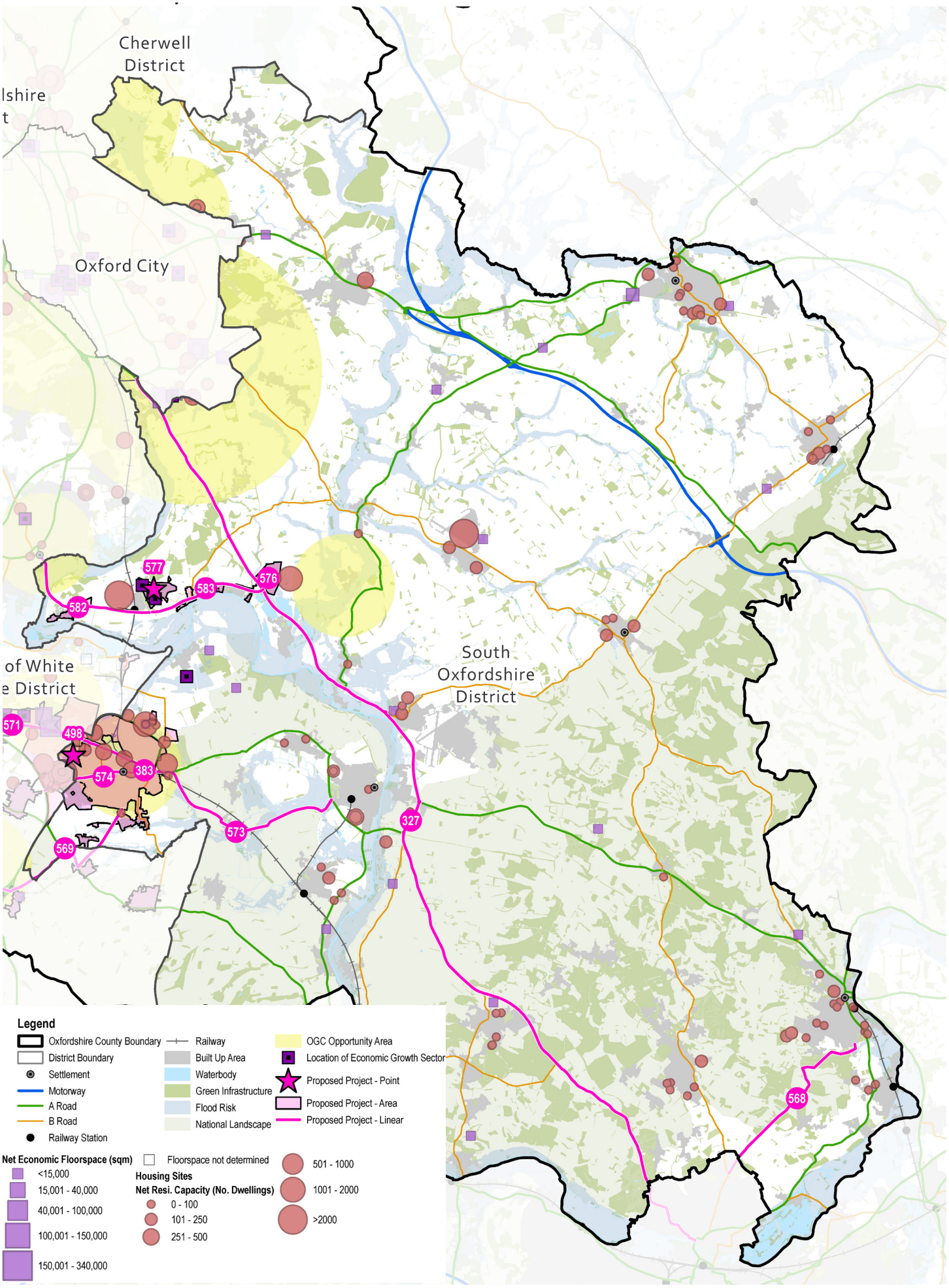
In addition to the identified strategic healthcare infrastructure projects, Oxfordshire has also experienced ongoing challenges in the funding and delivery of primary healthcare facilities.

An example includes the ongoing delays in delivering the committed Great Western Park Health Centre in Didcot, which was originally planned in 2008, with revised plans receiving planning permission in April 2025.

Historical delays in delivery have been identified as being due to the legal complexities of developer contributions, multi-agency involvement, and challenging economic circumstances. The project is now identified as a top priority by the Integrated Care Board.

However, the identification of a suitable reimbursement mechanism has been challenging, with recent reimbursement proposals by the developer partner not aligning with the national Premises Cost Directions and found to not represent value for money.

Wider factors include increasing costs of delivering healthcare facilities and the need to identify a mechanism through which future providers of the GP services can be appropriately reimbursed.



Prioritised OxIS District-Scale Infrastructure Projects (South Oxfordshire)

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

District-Scale Infrastructure Projects (South Oxfordshire)

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
327	Transport	**Improvements to the A4074 Travel Corridor**			
568	Transport	**Henley-on-Thames to Caversham in Reading (SATN)**			
573	Transport	**Didcot to Wallingford, via Hithercroft (SATN)**			
576	Water	**Culham Sewage Treatment Works**			
577	Energy and Utilities	**Culham Campus Heat Network**			

District-Scale Infrastructure Projects (South and Vale)

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
383	Transport	**Didcot Central Corridor**			
569	Transport	**Harwell Campus to Didcot, via Hagbourne Hill (SATN)**			
571	Transport	**Grove to Milton Park and Didcot, via Steventon (Cinder Track extension) (SATN)**			
574	Water	**Didcot Sewage Treatment Works**			
582	Transport	**Abingdon to Culham, with Thames Crossing (SATN)**			
583	Transport	**Abingdon to Berinsfield via A415 (SATN)**			
498	Health and Social Care	**Great Western Park Health Centre, Didcot**			

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
0	3	1	0	4	3	3	2	2	2	3	0	2	3	3	3	3	1	2	42
2	3	1	1	0	0	0	1	4	2	0	0	0	3	2	2	4	1	1	29
2	3	1	1	0	2	0	1	4	2	0	0	3	3	2	2	4	1	1	34
2	1	3	4	4	3	2	0	2	0	0	4	2	0	3	0	0	0	1	32
0	4	3	1	0	2	2	0	1	0	3	0	1	2	3	0	0	0	4	27

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
2	3	2	1	3	4	1	1	3	4	0	0	4	3	1	0	4	1	1	40
2	3	1	1	0	3	0	1	4	2	0	0	4	3	3	2	4	1	1	37
2	3	1	1	0	4	0	1	4	2	0	0	4	3	3	2	4	1	1	38
2	1	3	4	4	4	0	0	2	0	0	4	2	0	3	0	0	0	1	31
2	3	1	1	0	4	0	1	4	2	3	0	0	3	3	2	4	1	1	38
2	3	1	1	0	3	2	1	4	2	0	0	1	3	3	2	4	1	1	36
1	1	1	1	4	4	2	1	3	3	3	0	0	3	2	0	0	1	1	34

Vale of White Horse

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth at the district scale of Vale of White Horse. Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

Cross-boundary infrastructure investment associated with the Harwell-Milton-Didcot area, as well as network-based infrastructure serving Abingdon and Culham are presented collectively.

This category covers strategic projects beyond those considered in detail through existing and/or emerging Infrastructure Delivery Plans.

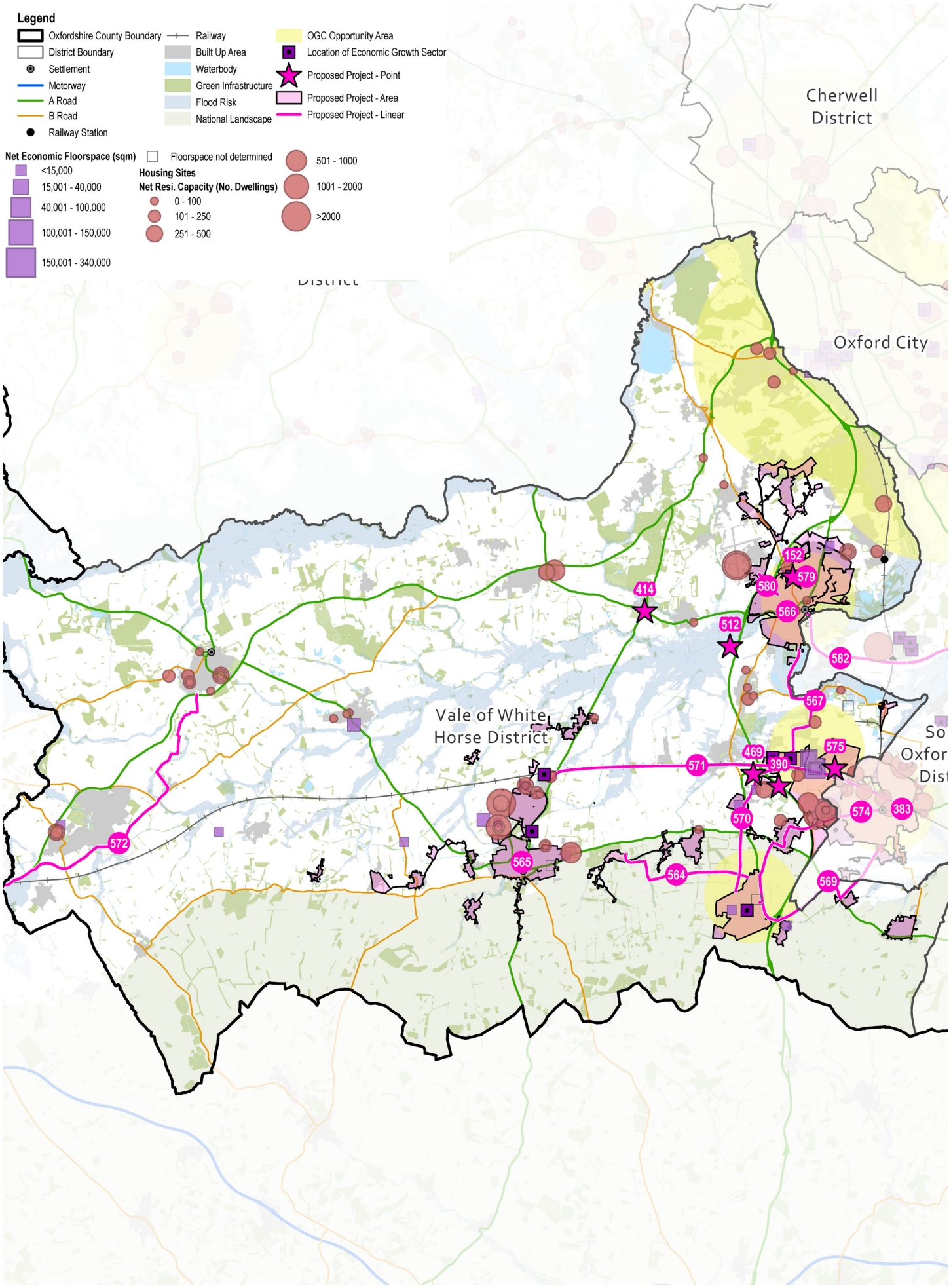
The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Growth Area Spotlight

Oxfordshire is progressing a programme of next-generation digital connectivity infrastructure to strengthen its innovation economy in R&D, advanced manufacturing and engineering and education. Two physical 5G infrastructure deployments have recently been delivered through the England's Connected Heartland programe, funded by the Department for Science, Innovation and Technology (DSIT).

The programme has established a secure, business grade 5G network at the Harwell Science and Innovation Campus, and a trackside 5G system along the Bicester-Bletchley section of the East West Rail. This creates the platform for improved passenger and transport infrastructure's digital connectivity along the Oxford-Cambridge Growth Corridor, with the added benefit of addressing persistent mobile 'not-spots' affecting rural communities.

The Science Vale Enterprise Zone and the UK's first AI Growth Zone in Culham present wider opportunities to establish a digitally enabled innovation corridor, integrating advanced wireless networks with research campuses, transport infrastructure and energy systems. Oxfordshire County Council is further examining enabling infrastructure including the Mobile Digital Twin Platform and Small Cells in urban areas to support 5G expansion.



Prioritised OxIS District-Scale Infrastructure Projects (Vale of White Horse)

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

District-Scale Infrastructure Projects (Vale of White Horse)

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
152	Social Infrastructure	**Green Construction Skills Centre**			
390	Transport	**Milton Heights Active Modes Bridge**			
414	Transport	**Frilford/ Marcham Lights and Junction Improvements**			
469	Transport	**Rowstock Area Transport Improvements**			
512	Water	**Abingdon-on-Thames Flood Alleviation Scheme (AFAS)**			
564	Transport	**Wantage to Harwell Campus (SATN)**			
565	Water	**Wantage Sewage Treatment Works**			
566	Transport	**Ock Street (SATN)**			
567	Transport	**Milton Park to Abingdon, west of Sutton Courtenay (SATN)**			
570	Transport	**Harwell Campus to Didcot via Milton Heights and Milton Park (SATN)**			
572	Transport	**Faringdon to Swindon via Shrivenham and Watchfield (SATN)**			
575	Energy and Utilities	**Didcot Power Station Heat Network**			
579	Water	**Abingdon-on-Thames Sewage Treatment Works**			
580	Transport	**Abingdon to Shippon via A34 pedestrian bridge (SATN)**			

District-Scale Infrastructure Projects (South and Vale)

No	Infrastructure Type	Project	2025-2030	2031-2040	2041-2050
383	Transport	**Didcot Central Corridor**			
569	Transport	**Harwell Campus to Didcot, via Hagbourne Hill (SATN)**			
571	Transport	**Grove to Milton Park and Didcot, via Steventon (Cinder Track extension) (SATN)**			
574	Water	**Didcot Sewage Treatment Works**			
582	Transport	**Abingdon to Culham, with Thames Crossing (SATN)**			
583	Transport	**Abingdon to Berinsfield via A415 (SATN)**			
498	Health and Social Care	**Great Western Park Health Centre, Didcot**			

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
1	2	1	1	0	0	0	0	1	2	3	0	0	4	4	0	0	1	2	24
2	3	1	1	0	4	0	1	4	2	0	0	4	3	2	2	4	1	1	37
0	1	0	0	2	1	1	2	1	2	1	0	0	1	0	2	1	1	0	17
0	2	0	0	3	2	2	1	1	1	0	0	4	2	2	2	3	1	1	28
1	0	4	4	0	0	1	0	2	1	0	0	0	2	0	0	1	0	0	17
2	3	1	1	0	3	0	1	4	2	0	0	4	3	3	2	4	1	1	37
2	1	3	4	4	4	0	0	2	0	0	4	2	0	2	0	0	0	1	30
2	3	1	1	0	2	0	1	4	2	3	0	1	3	3	2	4	1	1	37
2	3	1	1	0	3	0	1	4	2	3	0	3	3	3	2	4	1	1	40
2	3	1	1	0	3	0	1	4	2	0	0	4	3	3	2	4	1	1	37
2	3	1	1	0	0	0	1	4	2	0	0	0	3	2	2	4	1	1	29
0	4	3	1	0	4	2	0	1	0	2	0	2	2	3	0	0	0	4	29
2	1	3	4	4	2	0	0	2	0	1	4	2	0	2	0	0	0	1	29
2	3	1	1	0	2	0	1	4	2	0	0	1	3	3	2	4	1	1	33

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
2	3	2	1	3	4	1	1	3	4	0	0	4	3	1	0	4	1	1	40
2	3	1	1	0	3	0	1	4	2	0	0	4	3	3	2	4	1	1	37
2	3	1	1	0	4	0	1	4	2	0	0	4	3	3	2	4	1	1	38
2	1	3	4	4	4	0	0	2	0	0	4	2	0	3	0	0	0	1	31
2	3	1	1	0	4	0	1	4	2	3	0	0	3	3	2	4	1	1	38
2	3	1	1	0	3	2	1	4	2	0	0	1	3	3	2	4	1	1	36
1	1	1	1	4	4	2	1	3	3	3	0	0	3	2	0	0	1	1	34

West Oxfordshire

The table overleaf presents the outcomes of the prioritisation analysis for strategic infrastructure projects required to support sustainable growth at the district scale of West Oxfordshire. Appendix A2 provides further detail on each project, including delivery status, organisation, risks, dependencies, complexity, cost and funding and the respective MCA score.

This category covers strategic projects beyond those considered in detail through existing and/or emerging Infrastructure Delivery Plans.

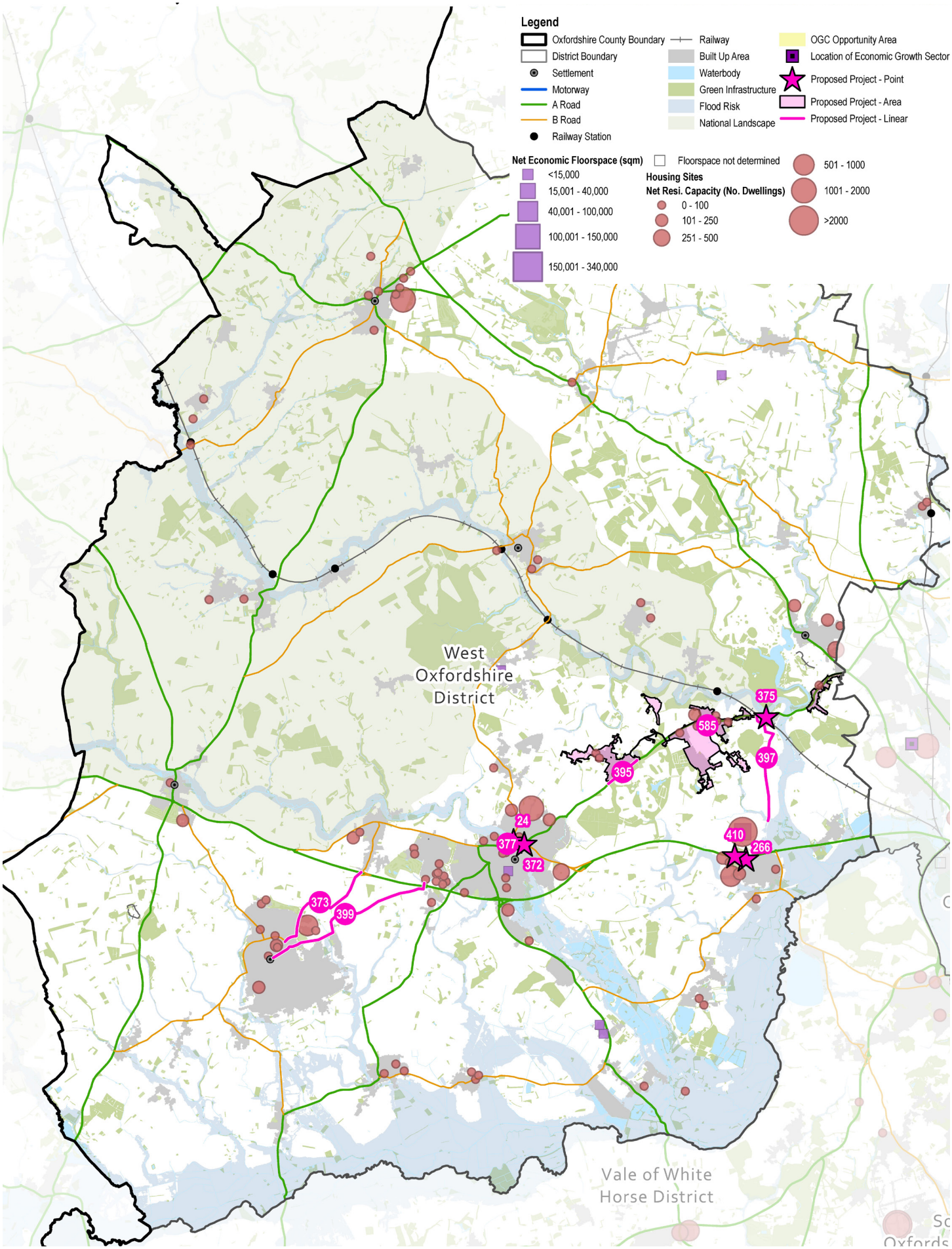
The analysis focuses on schemes currently at the planning or investigation stage, where further intervention may be required to accelerate delivery or enable future infrastructure provision. Other key infrastructure projects, such as those that are fully funded or at an ambition stage, are set out in Appendix A3.

Project Spotlight

Infrastructure to Unblock Stalled Development in West Oxfordshire

The following infrastructure projects have been identified as critical to unblock stalled development within West Oxfordshire:

- Improvements to Bridge Street and Staple Hall junction, Witney including public realm and traffic management
- West End Link Road
- A40 Grade Separated Crossing, Eynsham
- Phases 2–5 A40 Eynsham P&R to Wolvercote
- Upgrades of STW at Church Hanborough
- West End Link Flood Storage Area



Prioritised OxIS District-Scale Infrastructure Projects (West Oxfordshire)

**The numbered labels shown on the map correspond directly to the strategic infrastructure project reference numbers listed in the subsequent table.*

*** The interim Oxford Growth Commission's Opportunity Areas shown are indicative and provided for contextual purposes only. Decisions regarding growth quantum and locations will be established through future Local Plan processes.*

District-Scale Infrastructure Projects (West Oxfordshire)					
No	**Infrastructure Type**	**Project**	**2025-2030**	**2031-2040**	**2041-2050**
24	Water	**River Windrush (Witney) Flood Storage Area**			
266	Transport	**Phases 2-5 A40 Eynsham Park & Ride to Wolvercote**			
372	Transport	**Witney Bridge Street Area: Improvements to Bridge Street and Staple Hall junction, Witney including public realm and traffic management**			
373	Transport	**Access to Carterton: safety enhancements to the B4477 including junction improvements**			
375	Transport	**Hanborough Station Improvements**			
377	Transport	**West End Link (WEL2), Witney**			
395	Transport	**A4095 Cycle Route Gap at North Leigh**			
397	Transport	**Salt Cross to Hanborough Active Modes Routes - Lower Road Corridor**			
399	Transport	**Carterton to Witney Cycle Route**			
410	Transport	**A40 Grade Separated Crossing, Eynsham**			
585	Water	**Church Hanborough Sewage Treatment Works**			

Project Spotlight

Accelerating infrastructure delivery to unblock stalled development: Church Harborough Sewage Treatment Works

Current capacity constraints at several Sewage Treatment Works (STWs) in West Oxfordshire are considered critical to resolve in order to unlock the delivery of committed and planned housing and employment development.

A programme of upgrades is either under way or planned through Thames Water's current AMP8 investment cycle, particularly at Carterton, Cassington, Chipping Norton, Witney and Church Hanborough. These improvements will also need to be designed with long-term resilience in mind to accommodate additional growth to 2050, including potential site allocations and evidence from the Water Cycle Study emerging through the West Oxfordshire Local Plan 2043.

At Church Hanborough STW, the planned upgrade is expected to unblock at least 500 dwellings linked to proposed developments at North Leigh and Long Hanborough, where occupations cannot proceed until the necessary wastewater improvements have been delivered.

E1	E2	E3	E4	PI1	PI2	PI3	PI4	S1	S2	S3	Pr1	Pr2	Pr3	Pr4	C1	C2	C3	C4	Appraisal Score
3	0	4	4	3	1	2	3	2	1	0	0	0	2	0	0	1	0	0	27
1	2	1	1	0	2	2	3	1	2	1	0	1	1	1	2	2	1	2	27
1	2	2	1	3	2	2	0	2	2	2	0	0	3	0	0	2	1	1	28
0	0	0	0	3	1	0	0	1	1	0	0	0	1	0	1	1	1	0	11
0	3	1	0	0	0	2	2	1	2	1	0	2	2	0	2	2	1	1	23
0	1	0	0	3	2	2	3	1	1	2	0	0	1	0	1	1	1	0	20
2	3	1	1	0	0	0	1	3	2	0	0	0	2	0	2	4	1	1	25
2	3	1	1	3	1	0	2	4	2	0	0	3	3	0	2	4	1	1	35
2	3	1	1	0	1	0	1	3	2	0	0	0	2	0	2	4	1	1	26
1	3	1	0	4	2	1	2	3	3	0	0	4	3	0	3	4	1	1	38
2	1	3	4	4	2	0	0	2	0	0	4	2	0	1	0	0	0	1	27

04

Infrastructure Delivery and Funding

4.1 Introduction

This chapter of the Strategy identifies the challenges which are associated with delivering infrastructure, in order to set out the context and drivers for implementation of the strategy. This includes consideration of changes to infrastructure delivery that could be expected in the future and the drivers for these changes.

This chapter then considers the need to review the costs and potential funding of infrastructure, effectively establishing how much the infrastructure required to support growth in Oxfordshire will cost and how it will be funded and delivered. It will provide a critical step along the pathway towards implementation.

4.2 Infrastructure Delivery Challenges

Cost of infrastructure

There is growing demand for infrastructure. Infrastructure is typically expensive, and cost as well as complexity of both providing new infrastructure and maintaining existing infrastructure have increased in recent years due to:

- Inflationary pressures caused by recent worldwide events such as Covid-19 and disruptions to the global energy market;
- A particularly sharp increase in the cost of materials resulting in higher costs to the construction industry;
- Increased interest rates;
- Political changes and instability; and
- Complexities to trading with Europe and supply chain disruption due to Brexit.

There is the added issue that some infrastructure will be reaching an age where it requires either significant repair, restructure, or reprovision, potentially at the same time. Infrastructure that was built at the same time, using similar materials and provision models, are becoming increasingly less fit to service contemporary needs.

The availability of funding from both the public and the private sector is influenced by the macro-economic situation. In the UK in recent years the economy has been stalling or even contracting, and public sector budgets have been squeezed by central government's programme of 'austerity' which has seen successive reductions in grants to local government and public services. Recent political changes may offer a new approach to delivering and funding certain infrastructure but will also offer challenges associated with upheaval and uncertainty.

Development can contribute towards infrastructure through developer contributions and direct provision, but in the current economic climate scheme viability is often challenging.

Market failure

Infrastructure can be seen as a 'public good' in many instances, and challenges to infrastructure provision are often considered an example of 'market failure'. This is because additional demand from population growth can place increasing pressure on essential infrastructure, but unlike commercial services it doesn't necessarily receive proportional revenue and cannot restrict access because of political, legal and practical reasons. Left to competitive markets, infrastructure would frequently not be provided.

Infrastructure projects also often face challenges in attracting sufficient private investment and lend themselves to public financing or public-private partnerships due to various reasons, including:

- High upfront costs and long payback periods;
- Investment risks associated with construction of new projects (operating assets are more attractive);
- Scale effects (significant economies of scale tend to exist in facilities' construction and operation); and
- Information asymmetry, such as a lack of accessible and standardised data on infrastructure capacity, unclear or uncertain investment pipelines and fragmentation of data.

This is particularly challenging in addressing legacy infrastructure deficits such as flood risk, where there is limited market-led investment structure and incentives to construct assets aimed at reducing flood risk in already-developed areas.

Political and community issues

Delivering infrastructure often requires large areas of land which are subject to environmental constraints and fragmented land ownership.

Social, governance and economic changes can also present challenges in delivering infrastructure. These include demographic change such as population growth (and associated development pressures), aging population, decline in household sizes, and an increasingly diverse population. There are also geographical challenges that exist related to inter-generational and intra-generational inequalities and deprivation, with areas of higher deprivation experiencing more need for interventions related to improving physical and mental health.

Furthermore, political uncertainty, electoral terms, and frequent changes of legislation, policy and guidance relating to infrastructure planning, funding, and delivery can all present challenges to growth. Other related issues include organisational change at infrastructure provider / monitoring companies and agencies. Planned Local Government Reform represents another challenge for local authorities over the coming years which will directly impact the longer term planning of growth and infrastructure.

Local communities are also often opposed to infrastructure proposals. Infrastructure projects usually have strategic-scale benefits but can generate adverse effects on local host communities which need to be mitigated. Certain types of infrastructure can particularly generate strong political and community opposition, such as low traffic neighbourhoods, or waste processing facilities, making planning and delivery more difficult.

For this reason, a long-term strategic vision with strong leadership, which can transcend political cycles and localised political issues and challenges, is important for the successful delivery of infrastructure.

Other political and community issues which challenge infrastructure delivery can include a lack of capacity in design and enforcement of policy tools; and cross-boundary issues with statutory decision making, particularly considering the uncertainty surrounding the future of the Duty to Cooperate.

Complexity of infrastructure delivery

There are many infrastructure stakeholders and providers that are involved in funding and providing infrastructure, who have different responsibilities within the process. Close collaboration between local authorities and other bodies who commission, fund, and provide infrastructure is essential to ensure infrastructure planning and delivery is adequate and delivered promptly to meet growing demand.

Infrastructure delivery has not always aligned with the pace of housing and economic development, often due to limited cross-sector integration at early planning stages, long-term underinvestment, variable funding cycles, and the time required for key delivery processes. As a result, services such as energy connections can sometimes come forward later than needed, which may create capacity pressures for growing communities.

Technology and innovation

Cities and towns are rapidly changing and adapting to existing and future pressures. This change will have an inevitable impact on the type of infrastructure that is delivered and the way in which it is delivered. Technology and innovation can present solutions but also challenges for infrastructure delivery.

The following examples demonstrate changes to infrastructure delivery that could be expected in the future through new technology and innovation:

- Technology can reduce the need to build new infrastructure (by using smart technology to better manage the existing capacity of available assets);
- Technology can increase demand for additional capacity on existing infrastructure (for example increased demand for electricity due to the shift towards decarbonised energy and electric vehicles, and the rising demand for energy and water to support data centres);
- Technology can create demand for a new infrastructure system or mode (for example high speed transport technology, deployment of hydrogen fuels or carbon capture and storage, and creation of new waste streams); and
- Innovation can also reduce demand on existing infrastructure systems or modes (for example the impact of the modern car on the railway network in England in the 20th Century).

Environment

Challenges from an environmental perspective include the climate and nature emergency and national, international, and local commitments to meeting the climate challenge. For example, all six Oxfordshire local authorities are working towards net-zero, with the county aiming to be carbon neutral significantly ahead of 2050, and through the Zero Carbon Oxford Partnership aim for Oxford City to achieve net-zero by 2040. Additionally, the Oxfordshire's Local Nature Recovery Strategy also aims to aid decisions about nature recovery actions.
Furthermore, there is also the need for adaptation (to increasing frequency and severity of flooding and extreme weather events) relating to all types of infrastructure. Other environmental challenges include the quality and design of local built environment and infrastructure, urbanisation, and pollution (air, water, soil, etc.).

Sector Specific Delivery Challenges

A number of sector specific delivery challenges have been recorded through the Stage 1 and Stage 2 analysis and engagement. This includes the following as examples:

- Highways: Strategic road schemes face policy uncertainty due to the delay of the Road Investment Strategy 3 (RIS3) publication until April 2026.
- Rail: Delivery is heavily dependent on national government spending priorities, where changes can disrupt long-term planning. Additionally, the electrification of the rail network is constrained by a lack of capacity and necessary reinforcement works in the local electricity distribution network.
- Bus Services: A critical physical constraint is bus depot capacity, which is forecast to be reached by 2025 due to the extra space required for electric bus infrastructure. Funding beyond 2030 is currently uncertain and remains heavily reliant on Section 106 developer contributions.
- Electricity Network: Significant constraints and exceptionally long connection times for new housing are experienced in Bicester and Oxford City. Historically, regulatory frameworks prevented Network Operators from reinforcing the grid ahead of confirmed demand, and new 'anticipatory investment' rules are still challenging to implement. Engagement has confirmed that the current energy funding structure makes it unclear as to how much capacity is required and when it will be available to support growth.

- Data Centre Demand: Data Centre developments could be a major challenge to energy infrastructure across Oxfordshire, with nearly half of the estimated demand from committed and potential data centres if built currently lacking a clear mechanism for grid support.
- Water Supply: Thames Water forecasts supply-demand deficit of -90Ml/d by 2045 and may no longer routinely meet potable water demand of non-residential development, such as data centre development, which would require investment in water management.
- Wastewater Treatment and Water Quality: 77% of Sewage Treatment Works catchments were vulnerable to the risks of growth and climate change, requiring longer term investment to increase their capacity. Of the 501 waterbodies in the River Thames basin, 94% are at less than good ecological status, with 32% linked to water company activities.
- Flood Risk: There is no statutory requirement for infrastructure providers to reduce flood risk in already-developed (legacy) areas, limiting investment to new developments.
- Water Industry Regulation: Ongoing institutional changes, such as the 2025 announcement to replace Ofwat with a single water regulator, create uncertainty for long-term investment planning.
- Digital Infrastructure Viability: Achieving 100% gigabit coverage is hindered by commercial delivery constraints; as fewer properties remain unconnected, the rollout becomes less commercially viable for private providers. Alongside this, Oxford City and historic market towns have lower full-fibre coverage due to engineering challenges and heritage sensitivities associated with deploying infrastructure in a historic urban environment.
- Acute Healthcare: A key challenge is the rejection of central government funding for the £370 million rebuild of Horton General Hospital, making its renewal unlikely without new national backing.
- Primary Care: Facilities are heavily reliant on CIL/S106 funding, which often fails to cover the full capital costs of new primary healthcare hubs. Alongside this, engagement with the ICB has highlighted primary healthcare projects being hindered by reimbursement mechanisms proposed by developers not aligning with national Premises Cost Directions (which set out the parameters under which the NHS is able to reimburse the future providers of services for the cost of renting the new building from the developer).
- Education: While new schools are often funded by developers, the condition of existing school buildings is a major barrier, as these repairs or relocations are typically not supported by developer contributions.

4.3 The Funding Challenge

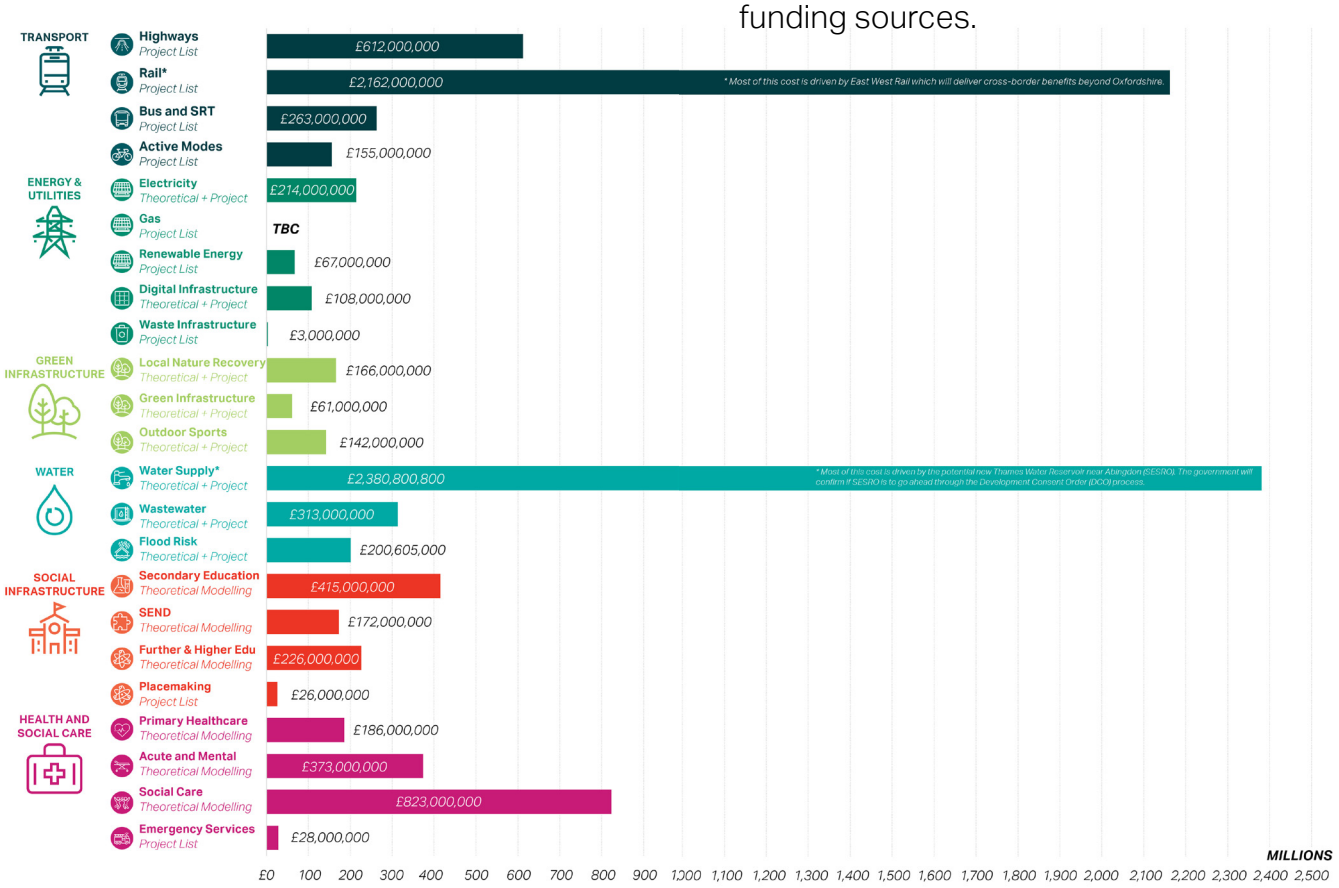
The OxIS research and project schedule sought where possible to record any identified costs and secured funding for existing projects. This information remains limited in many cases, with project costs as high level estimates or estimates produced at an earlier date.

Given the different levels of cost information and timelines at which each project is progressing, it is not felt as beneficial to present a detailed review of the current aggregated costs and funding.

A detailed assessment of infrastructure costs can be advanced further through further project scoping and business case development, including specific cost research related engagement with stakeholders and the application of up-to-date industry standard benchmarks for costing future infrastructure requirements.

To recap on the summary of infrastructure costs for all OxIS projects identified through Stage 1 of the Strategy the figure below illustrates the scale of financial challenge. There is a predictable, significant gap between the finances required to deliver the OxIS infrastructure projects and funding available to enable this.

The remainder of this chapter therefore explores the various sources of potential funding for Oxfordshire infrastructure. Most infrastructure receives all or a major part of their funding from national government, and distributed through OCC, local councils or a central government agency. Funding also comes from the charitable sector and the private sector, in the form of private equity and financial or in-kind contributions from developers. This chapter will now look in more detail at the mainstream funding sources, developer contributions and wider funding sources.



4.4 Delivery and Funding Opportunities

Oxfordshire Opportunities

Oxford Growth Commission

The Oxford Growth Commission was established by the UK Government in 2025 to review how best to unlock and accelerate sustainable economic growth in Oxford and its surrounding area by focusing on delivery of key infrastructure, housing and employment opportunities. It brings together central and local government, business and academia to identify barriers to growth, prioritise infrastructure investment (including transport, utilities and housing), and encourage public and private sector funding and delivery. The Commission's work supports the wider Oxford-Cambridge Growth Corridor objectives and is preparing recommendations to the UK Government on how to maximise the economic benefits of growth locally and nationally.

The Growth Commission represents a unique opportunity for Oxfordshire to benefit from this government priority and strongly complements the timing and outputs of the OxIS. The Commission will produce a final report in Autumn 2026 but recently published an interim report setting out the opportunities and issues in delivering growth alongside its stated priorities and next steps.

Enterprise Oxfordshire

Enterprise Oxfordshire focuses on securing and directing larger investment funds (like the Local Growth Fund, Getting Building Fund) for infrastructure, innovation, and skills.

Since 2014, Enterprise Oxfordshire has secured over £107.5million of investment to transform Oxfordshire businesses and communities through the government's Local Growth Fund. By 2030, all Local Growth Fund projects are collectively anticipated to lead to the creation of 9,500 jobs, support the development of 1,800 new homes and enable at least another £850million-worth of additional funding. In August 2020 Enterprise Oxfordshire secured £8.4 million from the government's Getting Building Fund to give Oxfordshire businesses and communities a boost following the Covid-19 outbreak. This is set to ensure the creation of 640 new jobs in the county by 2025, the preservation of a further 290, assistance for 350 businesses, and opportunities for approximately 500 new learners.

Oxon Green Futures / 100 Together

Oxon Green Futures is a prospectus and platform for investment-ready environmental projects in Oxfordshire, developed in partnership with the 100 Together initiative. Both are designed to attract private and public investment in green infrastructure, technology, and nature recovery to achieve the county's net-zero and nature-positive goal. The Oxon Green Futures initiative is a joint venture by Oxfordshire County Council and Enterprise Oxfordshire to create a comprehensive, auditable pipeline of green investment projects. The goal is to provide a platform for investors seeking high-impact, scalable opportunities that offer both financial

returns and measurable environmental impact. The OxIS Stage 2 project list incorporates example projects from the 100 Together initiative.

Higher Education Institutional Investment

The University of Oxford and Oxford Brookes University are central to Oxfordshire's ability to attract and justify strategic investment. Together they anchor the county's knowledge economy, strengthen the case for public funding, and help draw in long-term private capital by providing confidence in sustained growth, skills and innovation.

The University of Oxford represents a global economic driver whose research excellence, spin-out activity and international reputation support investment in transport, digital connectivity, utilities and major mixed-use development. Its leadership in large partnerships and development ventures, often backed by institutional investors, demonstrates how university involvement can unlock private finance alongside government funding. Alignment with national priorities such as science, productivity and Net Zero strengthens local infrastructure business cases and elevates Oxfordshire's profile in competitive funding processes.

Oxford Brookes University provides a complementary civic and applied role, with strong links to local communities, public services and employers. Its research and teaching strengths in the built environment, health, sustainability and skills development support infrastructure planning that delivers social value and inclusive growth. Its contribution to evidence-based policy, pilot projects and workforce development helps de-risk investment and strengthens bids for targeted infrastructure funding.

Active partnership with both universities enhances credibility with funders, supports robust infrastructure strategies and helps ensure that investment delivers long-term economic, social and environmental benefits across Oxford City and the wider county.

AI Growth Zone

Culham AI Growth zone designation includes policies to speed up planning permissions for AI infrastructure, reducing development timelines and uncertainty for private investors. Culham was specifically chosen because the decommissioning of the Joint European Torus (JET) fusion energy project freed up significant power capacity which is a crucial ingredient for energy-intensive data centres and a major draw for investment. The UK Atomic Energy Authority (UKAEA) is working on a private sector partnership, to develop a commercial masterplan for the campus, securing private funding for the necessary infrastructure development, redevelopment, and refurbishment. This model has the potential to blend public investment with private finance to bring forward infrastructure at speed, from data centres to supporting digital and energy infrastructure. The growth zone has the potential to de-risk and accelerate delivery of strategic infrastructure by aggregating demand, unlocking new funding partnerships.

Development Funding Infrastructure

The town planning process provides the means for developers to contribute to the cost of infrastructure necessary to support new development. This can be in various forms including planning conditions (which bind developers to provide infrastructure on-site 'in-kind'), S106 agreements between local authorities and developers, unilateral agreements provided by developers or landowners, Section 278 agreements which cover contributions to highways, and CIL for those authorities who have one in place.

OCC and the district councils have the statutory responsibility for entering into legal agreements with developers, monitoring the progress of development, relevant triggers in the agreement, compliance with specific obligations, receiving and holding financial contributions, and ensuring that money received is spent in accordance with the legal agreement, providing public accountability over this.

Section 106 Agreements

Section 106 of the Town and Country Planning Act 1990 (as amended) allows a LPA to approve a development proposal that would not otherwise be acceptable on planning grounds, on various conditions set out in agreements negotiated between local authorities and developers. These commonly include an obligation for developers to provide affordable housing (of various types and at various times) and to secure financial contributions and land from developers for all types of supporting infrastructure. Planning obligations can also be used as one of the mechanisms to secure biodiversity net gain.

The Community Infrastructure Levy Regulations 2010 (as amended) specify that Section 106 agreement can be concluded, only where such an agreement is: necessary to make the development acceptable in planning terms; directly related to the development; and fairly and reasonably related in scale and kind to the development.

Section 106 agreements should focus on specific measures to mitigate the planning issues which would otherwise lead to refusal of the planning application. Funding received under a Section 106 agreement must be spent on the infrastructure agreed to be delivered, pursuant to a developer contribution agreement.

Community Infrastructure Levy

The Community Infrastructure Levy is a fixed, tariff-based planning charge, which allows LPAs to require developers of particular types of development to pay a levy based on the size of the development (per square metre). The levy is intended to recognise the costs to LPAs in providing infrastructure to support the cumulative impact of development. LPAs are required to publish an annual Infrastructure Funding Statement (IFS) to provide transparency on the projects or types of infrastructure the council intends to fund and details of receipts and expenditure for the previous year. LPAs can determine whether or not to institute such a levy and the per square metre rates used for different development types.

The current status of CIL across the Oxfordshire districts is as follows:

- Cherwell – Draft charging schedule (2024)
- Oxford City – Adopted charging schedule (updated July 2025)
- South Oxfordshire - Adopted charging schedule (updated Dec 2022)
- Vale of White Horse - Adopted charging schedule (updated Oct 2021)
- West Oxfordshire - Adopted charging schedule (Oct 2025)

Development Viability

Any contribution by a developer to infrastructure (through an agreement) is dependent on the proposed development being commercially viable. Development viability acts as a financial constraint, fundamentally limiting the funds that can be secured to underwrite infrastructure requirements. Because the projected return or residual land value of a development must exceed the total cost (including infrastructure levies) to remain commercially feasible, there is a maximum amount that can realistically be extracted from the scheme. This ceiling in available development contributions ultimately influences how many projects on a long list of infrastructure needs can be fully financed and delivered.

The viability of prospective developments is sensitive to the value of the land on which the development is to be built and the level of contributions sought from developers to fund infrastructure. Higher land values indicate a greater prospect that a development will be able to contribute towards costs of the required infrastructure while remaining viable. Likewise development on existing brownfield land and within built up areas will likely have higher remediation and development costs than development on greenfield sites.

Planning Reform

The Levelling-up and Regeneration Act 2023, which received Royal assent in 2023, included provisions for a new national Infrastructure Levy to replace CIL and reform the current developer contribution system so it is simpler and more consistent.

The current UK government has indicated it will not however take forward the Infrastructure Levy and has instead committed to improving the existing developer contribution system. The government will focus on refining and enhancing the CIL and section 106 agreements to ensure developers provide adequate funding and support for local infrastructure and affordable housing. Efforts will focus on ensuring that developers make fair and significant financial contributions to local infrastructure, including schools, healthcare facilities, and green spaces, as well as affordable housing. The government also aims to grant local authorities greater powers to determine how these developer contributions are used to support local community needs.

Mainstream Funding

The following section summarises the key delivery bodies, funding bodies and related infrastructure funding sources available in Oxfordshire, by infrastructure type. This is accompanied by a more detailed look at some of those key funding sources.

Infrastructure Type	Delivery Bodies/Operators	Funding Bodies	Funding Streams
Transport			
Highways	National Highways, OCC, Enterprise Oxfordshire	Department for Transport	National Highways funds, Government Grants (i.e. LGF), DfT capital grants
Public Transport	OCC, Oxford Bus Company, Stagecoach Oxfordshire, Enterprise Oxfordshire	Department for Transport	The Local Transport Grant (LTG) Bus service Operators Grant Plus (BSOG+)
Rail	Network Rail, Great Western Railway, Chiltern Railways, East West Rail	Department for Transport	Rail Network Enhancements Pipeline
Active Travel	OCC, Active Travel England	Department for Transport	Active Travel Capability fund
Education			
Primary, Secondary Schools and SEND	OCC, Academy Trusts, Foundation Schools	Department for Education	Dedicated Schools Grant (DSG)
Further Education	OCC, Colleges	Education and Skills Funding Agency (ESFA)	ESFA allocation, Adult Skills Fund
Higher Education	Oxford University, Oxford Brookes University	Universities funding model	Operator Funded, Donations, Research Grants etc.
Health and Social Care			
Acute Healthcare, Mental Health and community services	Oxford University Hospitals NHS Foundation Trust, Oxford Health NHS Foundation Trust (OHFT) (OUH), NHS Property Services	Department of Health & Social Care, NHS England	Core NHS Funding allocation, Better Care Fund, Govt Research Grants, UKRI Infrastructure Fund
Primary Healthcare and Public Health	Buckinghamshire, Oxfordshire and Berkshire West ICB NHS Property Services	Department of Health & Social Care, NHS England	Core NHS Funding allocation, Public Health Grant
Social Care and Support for Adult, Children, Young People and Families	Oxfordshire County Council	Department of Health & Social Care, NHS England	Local government finance settlement, Better Care Fund, Local tax (Council Tax, business rates)
Green and Blue Infrastructure			
Active and Healthy Places	OCC, Oxfordshire councils, Natural England, Environment Agency	DEFRA/EA, OCC	Oxon Green Futures, 100 Together initiative, Government Grants, National Lottery. Oxfordshire Local Nature Partnership (OLNP)
Ecosystem Restoration	OCC, Oxfordshire councils, Local Nature Partnership (OLNP)	DEFRA, National Lottery	Defra Environmental Land Management - Landscape Recovery Scheme, Nature for Climate Fund, Species Survival Fund, National Lottery Heritage Fund - Landscape and Nature programmes

Infrastructure Type	Delivery Bodies/Operators	Funding Bodies	Funding Streams
Emergency Services			
Ambulance	South Central Ambulance Service (SCAS) NHS Foundation Trust	NHS Integrated Care Boards	Service Level Agreements (SLAs) with Integrated Care Boards (ICBs)
Fire and Rescue Service	Oxfordshire Fire and Rescue Service	OCC	Central Government Grant, OCC, Local tax (council tax)
Police	Thames Valley Police	Home Office	Home Office Grants, Local tax (council tax) set by Police & Crime Commissioner (PCC)
Energy			
Electricity	Scottish and Southern Electricity Networks (SSEN) and UK Power Networks (UKPN), SGN, NGN	Energy Companies	Operator Funded
Renewables	Department for Energy Security and Net Zero, OCC, Low Carbon Hub, private companies	Department for Energy Security and Net Zero	Local Area Energy Plan (OxLAEP), Green Heat Network Fund (GHNF)
Flood Risk and Water Management			
Flood Risk Management	OCC, LLFA, Environment Agency (EA)	DEFRA / EA	Flood Defence Grant-in-Aid (FDGiA)
Wastewater Treatment	Thames Water	Thames Water	Operator Funded
Water Supply	Thames Water	Thames Water	Operator Funded
Digital Infrastructure			
Digital Infrastructure	OCC, Commercial operators (BT Openreach, etc.)	Department for Digital, Culture, Media & Sport	UK Research and Innovation (UKRI)'s Infrastructure Fund, telecom company investment
Waste Management			
Waste Management	OCC, LPAs, private operators	OCC	OCC Capital Programme

Mainstream Infrastructure Funding in Oxfordshire (exc. Dev contributions)

Infrastructure Funds	Description
Housing and Infrastructure Fund (HIF) – (closed)	The UK's Housing Infrastructure Fund (HIF), a £5 billion fund to unlock new homes by funding essential infrastructure, has allocated over £4 billion to local authorities (although with slow spending and significant funds unspent). Fund was administered by Homes England. The core HIF period ran until 2022/23 although funds are still being managed. Oxfordshire was awarded a £215 million HIF deal in 2018 which was managed by the former Oxfordshire Growth Board (now Oxfordshire Leaders Joint Committee) to coordinate sustainable housing, economic, and infrastructure development across the county's six councils.
Enterprise Zone Business Rate Retention	Oxfordshire benefits from two Enterprise Zones at Science Vale UK and the Didcot Growth Accelerator. Enterprise Zones are designated areas aimed at stimulating economic growth by offering incentives to businesses to establish or expand their operations within them. All business rates growth generated within the Enterprise Zones is retained for 25 years – 2038 for Science Vale and 2041 for Didcot Growth Accelerator – and reinvested in local economic development. Enterprise Zone income is helping to fund a number of infrastructure projects in Oxfordshire. So far, this has included road improvement projects and enhancements to the area's public and active transport offerings.
Levelling Up Fund	The Levelling Up Fund is £4.8 billion which will be used to invest in infrastructure across the UK, including regenerating town centres and high streets, upgrading local transport, and investing in cultural and heritage assets.
Safer Streets Fund	Launched in 2020, the Home Office Safer Streets Fund has delivered £167 million through five rounds to go towards 413 projects. The funding supports measures proven to prevent neighbourhood crime.
Innovate UK Launchpad Programme	Innovate UK's Launchpad programme is aimed at supporting clusters of small and medium sized enterprises (SMEs) and the most innovative businesses to progress their ideas toward commercialisation, contributing to local economic growth. Innovate UK releases a range of funding for SMEs throughout the year and within different fields. There is specific funding available for digital and green infrastructure.
Active travel capability fund	Funding from DfT to support local transport authorities with developing and constructing walking, wheeling and cycling facilities in England outside London. The revenue funding will support network planning and early scheme design plus community engagement and training activities. Oxfordshire County Council has received funding of over £20 million for a 4 year period to 2030.
Active Travel Innovation Fund	The Department for Transport (DfT) and Active Travel England (ATE) launched the Active Travel Innovation Fund in late 2025, a £1 million competition offering grants up to £100,000 for small businesses, charities, and NGOs to develop new ideas or scale existing projects that encourage walking, wheeling (cycling/scooting), and active travel, focusing on accessibility and underrepresented groups

Infrastructure Funds	Description
Brownfield, Infrastructure and Land Fund	The Brownfield, Infrastructure and Land Fund is for public and private sectors to unlock strategic housing sites where brownfield, infrastructure, or land project face delivery and or viability challenges. The £1 billion fund supports projects that meet the strategic aims of the fund and will contract by 31 March 2026.
Green Heat Network Fund	The Green Heat Network Fund delivers support from £1 to £1 million for the commercialisation and construction of new low and zero carbon heat networks and the retrofitting and expansion of existing heat networks. The fund started in 2022, and the total amount available is £288 million which will be paid out over three years in quarterly funding rounds. The deadline for applications for this fund is 29th November 2024.
Local Power Plan	The Local Power Plan published in February 20026 is a national initiative led jointly by the Government and the Great British Energy (GBE) to expand local and community-owned clean energy. It commits up to £1 billion in funding to support over 1000 local and community energy projects through early stage support and development funding.
The Community Ownership Fund	The Community Ownership Fund (COF), is a £150 million fund to support taking ownership of assets which are at risk of being lost to the community. In March 2024, the final round of the COF was announced. Voluntary and community organisations or parish, town and community councils can apply by submitting an expression of interest form. Individuals can apply for a mix of capital and revenue funding: • Capital funding – up to £2 million for all asset types, but it is expected that most awards will be closer to the £250,000 range; • Revenue funding – cannot be more than 20% of capital funding or £50,000, whichever is smaller.
England Woodland Creation Offer	The England Woodland Creation Offer (EWCO) supports the establishment of new woodlands and is administered by the Forestry Commission (FC). It is funded by the Exchequer through the Nature for Climate Fund, to support projects that will help the UK achieve Net Zero by 2050, as well as helping nature recovery and delivering other objectives in the 25 Year Environment Plan. Public bodies can apply to the EWCO for support to create new woodland, including through natural colonisation, on areas as small as one hectare. Up to £10,200 is available per hectare and the total size of the grant scheme is £115 million.

Infrastructure-focused Investment Funds

Wider Income Sources

In addition to mainstream funding sources and developer contributions as described above, other funding sources potentially available to fund infrastructure in Oxfordshire are set out below.

Homes Bonus Accelerator programme

The New Homes Accelerator is a collaboration between the government, Homes England, local authorities, developers and other key stakeholders. It aims to unblock and accelerate the delivery of housing developments that have for various reasons become delayed, or which are not progressing as quickly as they could be. The programme was launched in 2024 and is actively intervening in projects across the country. Importantly for this document, a key tool within the programme is the distribution of grants to local authorities as part of a package of interventions.

UK Shared Prosperity Fund (UKSPF)

While a member of the EU, the UK received around £2bn in structural funding, and could also access the European Investment Bank. Arrangements for national successor funding were confirmed in April 2022 when the Government launched the UKSPF[1]. This is a £3.5bn fund (2022 – 2026) for local investment with local authorities across the UK receiving an allocation via a funding formula rather than a competition. The fund is centred around three key themes: Community and Place, Supporting Local Businesses and People and Skills.

Business Rates Retention

Since reforms in 2013/14, local authorities have kept 50% of the business rates revenues raised locally (the grant received from central government has been adjusted to compensate those who generate less locally-raised revenue). There may be scope for Oxfordshire authorities to review current arrangements with central government and argue a case for the retention of a greater proportion of business rates in order to raise funding for infrastructure.

Tax Increment Financing (TIF)

Tax Increment Financing can use future growth in business rates on commercial property from new development within a defined area, initiated through associated infrastructure investment, to repay upfront borrowing for that infrastructure, effectively letting councils "borrow against tomorrow's taxes" for today's projects like roads or regeneration. This value capture tool funds improvements by earmarking the increase in local taxes generated by the development, creating economic benefits (jobs, growth) without raising current tax rates. This approach could also be expanded by capturing revenue from residential property taxes from new homes unlocked by infrastructure investment.

Stamp Duty Land Tax (SDLT)

SDLT must be paid if a person buys a property or land over a certain price in England. This includes when a person buys a freehold property, buys a new or existing leasehold or buys a property through a shared ownership scheme. An SDLT supplement of 3% applies where a buyer purchases a second property for £40,000 or more, such as a buy-to-let property or a holiday home. SDLT goes to HM Revenue and Customs i.e. central government,

1 https://www.gov.uk/government/publications/uk-shared-prosperity-fund-prospectus/uk-shared-prosperity-fund-prospectus.

but a supplement could be charged and passed to a local authority to fund local infrastructure.

Council Tax Levies

Council tax is a compulsory charge on properties in England. It is set by local authorities to raise money for providing services and infrastructure. Typically, anyone who is over 18 and owns or rents a home has to pay council tax. Council tax helps to fund numerous services such as rubbish collection, street lighting, libraries, police and fire services, community centres and recreation facilities. Council tax bills also include additional charges called levies which pay for other services. One levy goes towards the cost of care homes and other adult social care services. Another is set by local police and fire authorities to help fund their services. Some cities with mayors, such as London and Manchester, can also add a separate levy that covers funding various services.

Parking Revenue

In 2022-23, local authorities in England generated £962m in parking charges[2]. Income from parking charges is generally spent on running parking services and any surplus is spent on essential transport projects such as road repairs, reducing congestion, tackling poor air quality and supporting local bus services.

Public Works Loan Board (PWLB)

Councils can obtain loans at low rates from the PWLB under prudential principles. HM Treasury manages lending via the UK Debt Management Office (DMO). However, the availability of revenue funding to repay the loan and the political appetite for borrowing are factors affecting the attractiveness of this option.

Clean Air Zones

Clean air zones and low emission zones are specified areas in the UK where vehicles are required to meet minimum emission standards. Driving a vehicle that exceeds the minimum emission criteria can incur a charge payable to the local authority. Examples include the Ultra Low Emission Zone (ULEZ) in London which has been in place since 2019. Revenue from ULEZ helps Transport for London to fund expansion and maintenance of the rest of the transport network.

Third-party equity investment

Where there are potential commercial returns for funders. This includes institutional investors / sovereign wealth funds and pension funds who are attracted to the UK infrastructure market as a place to invest.

Direct Delivery

Oxfordshire planning authorities could purchase land with development proposal, progress design and planning in order to increase land value, and then raise funding from its disposal (this could be in the form of land receipts and / or a share of development profit or overage).

2 Local Gov (2023). Council's parking revenue approaches £1bn. Available at: https://www.localgov.co.uk/Councils-parking-revenue-approaches-1bn/58148

05

Recommendations and Next Steps

5.1 Recommendations and Next Steps

This chapter of the Strategy provides a set of recommendations and potential next steps for consideration by the OLJC and partners.

How to use the Prioritisation Framework Most Effectively

The Prioritisation Framework as developed through this strategy provides the OLJC and partners with a tool and not just a set of fixed outcomes. Because the potential number of outcomes is so large (depending which filters are applied) this strategy document has chosen to present one set of base case outcomes as a demonstration but also to reflect the balanced score card approach across all themes and criteria.

The framework can however be used to undertake specific tasks or generate outputs for a specific purpose. Partners can utilise the incorporated implementation filters (as explained in Chapter 2). These will allow more refined outcomes to be presented according to the thematic, spatial, or temporal interest of the user. Using these filters, the following focused outcomes can be generated:

- Thematic/Geography – whilst the framework contains infrastructure projects across all infrastructure types the project list can be simply filtered to show one or a group of specified infrastructure types. This would enable the priority infrastructure projects for a specific type to be presented for any scale/geography.
- Project Basis – The Project Schedule is also categorised according to whether these projects unlock growth, mitigate impacts of development or are proposed for other reasons (i.e. strategic innovation). This enables the list to be filtered for example to show just those key projects required to unlock growth in Oxfordshire, or a specific district if selected.
- Project Status and Timing – Categorisation by project status and also the likely delivery timing (as included in the outcome tables in Chapter 3) provide further potential filters. For example, the OLJC and partners can use the framework to focus on projects grouped as committed and pending short term priorities. Alternatively, the framework could be used to focus on projects grouped as longer term project currently being investigated.
- Project Finances – Whilst the project finance information held within the OxIS project list requires further development it does contain cost and current funding positions where possible. This provides additional options for framework use to focus attention on project lists according to those with considerable funding challenges or alternatively projects close to fully funded and would require a smaller effort to complete project finances and enable delivery.

The prioritisation framework contains both a balanced score card appraisal score (as presented in Chapter 3 of this document), but also a **weighted scenario appraisal score** which has been included based upon feedback from the project steering group, to highlight those projects which contribute to housing and economic development. These scores have effectively increased the impact of MCA scores for Place and Productivity criteria.

The data held within the OxIS Prioritisation Framework, project schedule and project WebGIS also provides partners with the ability to focus the outcomes and project lists into **packages of infrastructure related to specific growth locations**, whether these be Local Plan related, economic focus areas such as the Culham AI Growth Zone or priority regeneration areas such as the Oxford City West End.

Continued Joint Working and Integrated Planning

Fundamental to the successful implementation of the OxIS is the continuation of integrated and joint working. OxIS itself has been developed through close collaboration of the OLJC and its partners alongside a wide range of technical stakeholders. This is the third iteration of the OxIS over the past 10 year and the practice of joint working across Oxfordshire for the benefit of its residents, businesses and environment must continue in order to deliver joined up solutions for infrastructure planning.

OxIS represents one part of a suite of strategies in development that cover the county, alongside, for example, the Oxfordshire's Local Nature Recovery Strategy (LNRS), Oxfordshire Local Area Energy Planning (OxLAEP) and the Oxfordshire Rail Plan (OxRAIL 2040: Plan for Rail). The continuation of aligned strategy development will be critical to ensure the Strategic Vision for Oxfordshire is consistently integrated across all evidence bases and strategic plan making.

The implementation of OxIS will take place during a period of change through Local Government Reform. While a number of potential outcomes will result from this reform, the fundamental need to plan and deliver strategic infrastructure in a collaborative, cross boundary manner will remain.

The Planning and Infrastructure Act 2025 establishes a statutory requirement for Spatial Development Strategies (SDS) to be prepared at a strategic scale across England. Whilst the governance for this process is not yet established for Oxfordshire, there is an expectation that an SDS would be in place within the current parliament (by 2029). An important element of any future SDS will be a clear understanding and plan for strategic infrastructure provision. The Oxfordshire authorities are well placed to inform this future process from the extensive work already compiled through the OxIS.

Cross Government Departmental Engagement

The OLJC and its previous entities (Future Oxfordshire Partnership and Oxford Growth Board) has a strong track record of working collaboratively with Government and its agencies to the benefit of Oxfordshire. This was demonstrated through the £215 million Housing and Growth Deal secured with central government, directly informed by the first iteration of the OxIS. Continuing this tradition of engagement with MHCLG and Homes England (with its current focus on

increasing housing supply, facilitating major regeneration projects, and unlocking land through significant investment in enabling infrastructure) will remain an important means to implement the recommendations within the OxIS.

The recently established Oxford Growth Commission represents the latest opportunity for the OLJC and its partners to continue to actively engage with Government on its priorities for sustainable growth in the Oxford-Cambridge Growth Corridor. The Growth Commission represents a unique opportunity for Oxfordshire to benefit from this government priority and strongly complements the timing and outputs of the OxIS. As stated in Chapter 5, the Oxford Growth Commission has a number of priorities related to infrastructure including developing delivery plans, business cases; supporting key growth projects, the coordination of investment, and innovative funding and delivery options, which all represent opportunities for the OxIS to inform and influence.

Collaboration with the National Infrastructure and Service Transformation Authority (NISTA) will also be an important element of this cross-government engagement. NISTA is tasked with delivering the UK infrastructure strategy and delivery, merging the functions of the National Infrastructure Commission (NIC) and Infrastructure and Projects Authority (IPA) to ensure strategic infrastructure projects are delivered effectively and in support of economic growth.

Infrastructure Service Provider Partnership Working

The effective delivery of housing and employment growth and associated infrastructure will continue to require a partnership approach between Oxfordshire councils and wider public and private sector infrastructure service providers. The OLJC has an opportunity to lead this process on the back of the infrastructure strategy and the momentum already started through partnership engagement undertaken. The OLJC could potentially create an 'OxIS Partnership', utilising the existing relationships between the Oxfordshire authorities and the key infrastructure service providers but also the recent workshops and meetings held to produce this strategy.

There may be opportunities to join with neighbouring authorities to create joint infrastructure partnerships as the majority of infrastructure partners will be the same for a number of local planning authorities and will help to avoid the duplication of effort and meeting attendance which will be favourable to organisations with limited resource and budget. This will of course be influenced by the outcomes of planned Local Government Reform.

These partnership meetings could potentially be held annually (or bi-annually) and include but not be limited to the following activities:

- Local authority planning teams update to partners on local plan and SDS progress, and housing and economic growth trajectories.

- Updates to the OxIS project schedule with partners including the refining of details, timings, costs and funding positions.
- Prioritisation review - rolling review of outstanding priority projects, funding position and delivery options
- Consideration of specific strategic sites which require joined up decision making on particular issues.
- Consideration of upcoming funding bid opportunities and joint working to submit business plans.

Leveraging Cross-Sector Investment Opportunities

The OxIS project schedule and the outcomes of the prioritisation framework demonstrate the substantial number of strategic infrastructure investment opportunities across Oxfordshire. Many of these opportunities are not limited to stand alone projects but instead packages of cross sector investment required to support sustainable development.

The same analysis has highlighted the potential scale of funding required to support these investment opportunities and the strategy has also set out a wide range of potential sources of funding, including mainstream traditional sector specific funds, developer contributions but also Oxfordshire specific opportunities and cross sector growth related funds which could be explored further to potentially address funding shortfalls on some of the identified high priority investments. The 100 Together Initiative and its Oxon Green Futures Prospectus provide a strong cases study in the effective communication of infrastructure investment opportunities to the market, which could be adopted as a means to communicate the key investment requirements prioritised through the OxIS.

Investment in infrastructure projects will need to be smart, efficient and leverage cross sector benefits and outcomes. Examples would include nature-based solutions creating significant green and blue infrastructure alongside connectivity projects such as greenway links. Alongside this, where significant investment is committed to deliver strategic infrastructure projects (such as the East-West Rail scheme), opportunities to align associated infrastructure project delivery should be explored to ensure the full value is extracted from that investment.

Strategy and Project Schedule Review Mechanism

The OxIS presents information from a static point in time. The project schedule reflects the research and engagement undertaken between the summer and autumn of 2025 with the Stage 2 sifted project schedule and prioritisation outcomes reflecting information available at the end of 2025. The outcomes of the strategy will therefore be of greatest relevance and use in 2026 and the wider recommendations set out above are therefore more urgent for this reason. However, a commitment by partners to revisit and update key components of the OxIS (i.e the growth data and infrastructure project schedule) in partnership with infrastructure service providers on a regular

basis (for example annually) will enable an ongoing relevance and useability of the OxIS. This can also include focused reviews of a package of priority infrastructure projects in an area with regards to their sequence and detailed costs of delivery.

Any review mechanism has the potential to include monitoring of the OxIS work and project implementation through an appropriate monitoring framework. The specific approach and criteria to be included within such a monitoring framework whilst ultimately agreed by the relevant partners would be expected to reflect the balanced themes and topics within OxIS.

Continued investment in strategic transport modelling capability is recommended to support the delivery of key transport investment programmes prioritised through OxIS. An appropriate and up-to-date model will enable the detailed development and appraisal of strategic transport infrastructure, support the preparation of proportionate business cases to unlock public and private sector investment, and improve cross-boundary coordination of transport planning. This will provide a robust and integrated evidence base to align infrastructure investment with sustainable development objectives.

Responding to Evolving Drivers of Change

The OxIS has considered the existing and potential future requirements for infrastructure, taking into account both the current means in which infrastructure is planned but also mindful of potential changes (see 'Drivers of Change' in Stage 1 Report). This can only go so far however in the present context and will require continual review and reflection to ensure that strategic changes to the way an infrastructure service is assessed, planned and implemented is captured in any long-term infrastructure strategy proposals.

Infrastructure Planning Data

The information gathered through the OxIS commission is hugely valuable to the OLJC but also the multiple partners involved in its production and implementation. This includes baseline data covering planned housing and economic development and existing infrastructure provision and capacity. GIS based mapping has been collated and supports the OxIS with the potential to be shared and further refined by partners.

The NISTA is running a new digital spatial planning tool. This tool incorporates environmental, infrastructure, economic growth and housing needs up to 2050. The tool is intended to provide further evidence to support place-based infrastructure investment and forms part of the governments National Infrastructure Strategy. The data collated and analysed through OxIS represents a valuable resource to inform NISTA, and in due course future iterations and updates to the NISTA spatial planning tool can feed back into the infrastructure planning of Oxfordshire.

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