OxLEP
driving economic growth

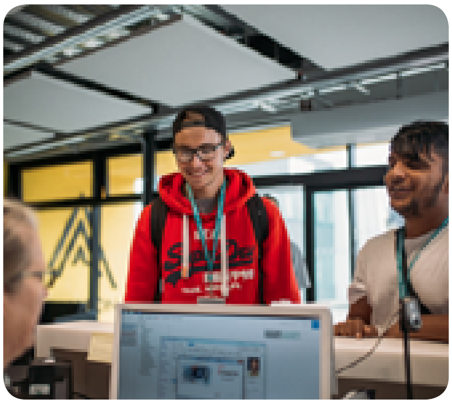
Creating the Environment for Growth

Strategic Economic Plan for Oxfordshire 2016











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Foreword

I am pleased to present our updated Strategic Economic Plan (SEP) for Oxfordshire 2016.

As the Local Enterprise Partnership for Oxfordshire, we have brought together the views of our local authority, culture, business, and voluntary sector partners to provide this high level 'economic route map' for the successful and sustainable development of our region.

We have also taken time to consult widely with other organisations and with the general public, and we thank everyone who has responded to this consultation process.

The SEP highlights two of our most pressing challenges – the need to provide more affordable housing across the region, and the need to provide more capacity on our roads, and to tackle congestion.

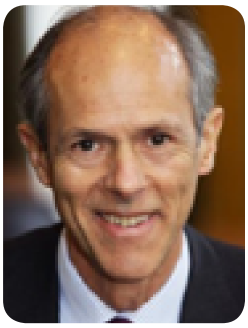
The SEP also recognises the importance of nurturing our natural, cultural, and heritage assets – these are a key attraction for visitors, residents, and businesses alike.

Oxfordshire is a very successful and dynamic region – we have a highly skilled workforce, a strong network of schools, colleges and Universities, together with a wide range of successful, growing, and world-leading businesses in some key emerging sectors for the UK.

2016 has been a momentous year on the national stage, the British public's referendum vote to leave the EU in June was significant and far reaching. We do not yet fully understand the impact of this decision for British business, but what is clear is that we have to work with our businesses to prepare for change.

Our role, as OXLEP, is to continue to work closely with our partners across all sectors to achieve our shared vision of:

Oxfordshire as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence



Jeremy Long
Chair of the Oxfordshire Local Enterprise Partnership

Statue of King Alfred, Wantage

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1. Executive Summary

This refreshed version of the Strategic Economic Plan (SEP) for Oxfordshire takes into account evidence that has become available since the first SEP was produced in 2014, including new strategies relating to skills, innovation, culture and heritage, and natural resources and the environment. It acknowledges the changing context for Oxfordshire's economic well-being. It also responds to substantial engagement from the county's businesses, universities, research institutions, local authorities, voluntary and community sectors, and many of its residents. Like its predecessor, this refreshed SEP signals our strong ongoing commitment to sustainable economic growth across the county.

Oxfordshire is notable for the excellence and scale of innovation, enterprise and research within the county, and for the dynamism of its economy

Oxfordshire's SEP is intended to be a widely-owned *"economic route map"* focused on supporting the economic performance, potential and prospects of Oxfordshire, and managing the county's strong economic growth to ensure sustainability and inclusivity. Compared to the original SEP, this refreshed version is higher level, shorter and clearer. It focuses on strategy rather than the details of delivery.

The original SEP was prepared at the same time as the Oxfordshire Strategic Housing Market Assessment (SHMA), in 2013. It incorporated the figures for employment growth produced for the SHMA, along with the housing requirement figures. This refreshed and updated SEP also reflects these figures. It is important to note therefore that the employment and housing figures in this SEP are a product of the local planning process, not an input into it.

We will continue to work with our local authorities and the Oxfordshire Growth Board over the coming years – the relationship between the organisations involved is demonstrated in Annex C.

Our vision is Oxfordshire as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence.

Oxfordshire is notable for the excellence and scale of innovation, enterprise and research within the county, and for the dynamism of its economy: both employment and GVA (Gross Value Added) are growing strongly, activity and employment rates are high, and there is very low unemployment. The scale of recent investment in some of its most successful firms bodes well for the future. In addition, significant progress has been made over the last two years in delivering against most of the objectives set out in the 2014 SEP.

However, there remain the inter-linked issues of the lack of housing that people can afford, and increasing congestion on our roads.

However, there remain the inter-linked issues of the lack of housing that people can afford, and increasing congestion on our roads. There are also concerns around sustainability and inclusion that must be addressed. There is also a need for greater resilience in the face of increased global risks and uncertainty.

We aim, with partners, to harness Oxfordshire's unique combination of assets to ensure that by 2030, the county's economy is recognised to be:

- **Vibrant:** Oxfordshire will be a place where ambitious businesses and people thrive; and where young people choose to build their careers and their lives, contributing to the vibrancy of Oxfordshire's communities;

- **Sustainable:** Oxfordshire will be on a trajectory for growth that is sustainable environmentally (taking into account climate change, carbon emissions, heritage, the natural environment and patterns of resource use), socially (reflecting the needs and character of communities) and economically (with businesses and others choosing to re-invest);

- **Inclusive:** Oxfordshire will be a place in which all residents – irrespective of age, gender, or ethnicity – have a real stake in determining the county's future economic narrative and contributing fully to it;

- **World-leading:** Oxfordshire will be a place that is recognised globally for its dynamic innovation ecosystem, founded on world class research and fuelled by enterprise, all within an environment of the highest quality.

These outcomes will be achieved through four wide-ranging programmes, each with priorities to 2020, and a number of key action areas. The programmes are:

People – delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, filling skills gaps, and seeking to ensure full, inclusive, employment and fulfilling jobs;

Place – ensuring a strong link between jobs and housing growth, and providing a quality environment that supports and sustains growth; and offering the choice of business premises and homes (including more homes that are genuinely affordable) needed to support sustainable growth whilst capitalising on and valuing our exceptional quality of life, vibrant economy and urban and rural communities;

Enterprise – emphasising innovation-led growth, underpinned by the strength of Oxfordshire's research, business collaboration and supply chain potential; recognising and reinforcing the significant contribution made by all sectors, in all parts of Oxfordshire and all types of business;

Connectivity – enabling people, goods and services to move more freely, connect more easily; improving broadband and mobile coverage and capacity; and providing the services, environment and facilities needed by a dynamic, growing and dispersed economy.

we will encourage the local commercialisation and application of technologies developed by Oxfordshire's research and business communities in areas which improve environmental sustainability and health outcomes

We will ensure that the inter-relationships and opportunities across these programmes are fully exploited. For example, we will encourage the local commercialisation and application of technologies developed by Oxfordshire's research and business communities in areas which improve environmental sustainability and health outcomes (such as low carbon, low energy systems, autonomous vehicles and digital health) in order to benefit Oxfordshire's people, places and connectivity.

There is an important cross-cutting spatial dimension to the SEP. We will maintain the principal spatial focus on Oxfordshire's Knowledge Spine – from Bicester in the north through Oxford to Science Vale in the south – as the main location for housing and employment growth. However, we will also continue to encourage and support projects in the market towns and rural areas which support the objectives of the SEP, and ensure these areas are well connected to the Knowledge Spine (and elsewhere).

In delivering the refreshed SEP, we will work through clear governance and management arrangements, building on the substantial progress that has been made over the last two years and supporting on-going initiatives to devolve significant responsibilities and funding to deliver local services and infrastructure improvements. It will work closely with key partners and stakeholders including Oxfordshire's local authorities[1] and the Oxfordshire Growth Board, and the county's businesses, voluntary organisations, academic institutions, and residents.

Diamond Light Source, Harwell

© South Oxfordshire DC

1 Cherwell DC – www.cherwell-dc.gov.uk , Oxford City Council – www.oxford.gov.uk , Oxfordshire County Council – www.oxfordshire.gov.uk , South Oxfordshire DC – www.southoxon.gov.uk , Vale of the White Horse DC – www.whitehorsedc.gov.uk , West Oxfordshire DC – www.westoxon.gov.uk


Radcliffe Observatory, Oxford
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2. Introducing Oxfordshire's refreshed Strategic Economic Plan

It is now two years since we published our first Strategic Economic Plan (SEP). In the interim we have achieved a great deal, and the SEP itself continues to be widely endorsed.

The decision to update and refresh the SEP has been prompted by our desire to continue to nurture Oxfordshire's economy. The refreshed SEP:

- reflects new evidence and insight that has become available over the last two years;
- embraces a number of investment plans and strategies that have been completed (or are ongoing) within the county, relating (for example) to skills, innovation, culture and heritage, and the environment;
- acknowledges the changing wider context for Oxfordshire's economic well-being – and particularly, the far greater global economic uncertainty that is likely to define the next five years, including in relation to the outcome of the referendum on the UK's membership of the EU;
- responds to substantial engagement from the county's businesses, universities, research institutions, local authorities, voluntary and community sectors, and many of its residents;
- anticipates that the process of devolution will progress substantially over the months/years ahead.

Through the refresh process, we have sought to ensure that Oxfordshire's SEP is a widely-owned "economic route map" for the county as a whole. It is not a county-wide development plan that identifies locations for new housing and employment growth – this is the responsibility of district councils as local planning authorities to determine through the Local Plan process – see Annex C for more detail on the relationship between the SEP and the local planning process.

The SEP focuses on realising the opportunities in Oxfordshire to achieve sustainable development and to conserve its natural resources and built heritage. It has been informed by a series of public workshops and it has benefited from a full public consultation (which generated almost 300 written responses).

Box 1: What we mean by sustainable development

The 1987 Brundtland Report defined 'sustainable development' as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. What does this mean in the context of Oxfordshire's Strategic Economic Plan?

Oxfordshire LEP was established by the Government to support economic growth in Oxfordshire. Its focus, therefore, is on supporting economic growth which delivers sustainable and inclusive outcomes and creates a vibrant and world leading business environment. This type of growth will:

- enhance and develop community coherence and connectivity, building in community well-being and resilience for the future;
- ensure today's and tomorrow's residents can find good jobs and homes they can afford in the county;
- use the incredible scientific and technological expertise in Oxfordshire's institutions to stimulate economic growth which is more sustainable, more inclusive and genuinely world leading in its characteristics;
- enable infrastructure improvements which we all want to reduce congestion, but know we cannot afford without the public and private sector funding that only comes with planned growth;
- enable us to insist on, and afford, new development which is high quality and enhances the built environment;
- enable investment in developing the skills of our young people;
- make better use of limited and precious resources such as water, energy and land;
- ensure that Oxfordshire continues to make a strong, positive contribution to the national Exchequer.

Growth therefore needs to be both supported and managed, to produce positive, sustainable outcomes. This is what the LEP is seeking to do: to achieve the vision in the Strategic Economic Plan

Figure 1: The purpose of Oxfordshire's Strategic Economic Plan (SEP)

The purpose of SEPs, as defined by government, is: to provide the clear vision and strategic leadership to drive sustainable private sector-led growth and job creation

… which in Oxfordshire means:
managing and supporting the process of economic growth in a manner that responds to Oxfordshire's particular assets, opportunities and challenges

… by:

- working closely with businesses, local authorities and the community sector
- steering resources over which we have some control to respond to agreed priorities
- working with central government and wider partners to influence wider resourcing processes and decisions

… to deliver our Vision, which is:
Oxfordshire as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence

The role of OxLEP

The Strategic Economic Plan is a plan for the whole of Oxfordshire. It is not a business plan for OxLEP, although we will play key roles in its implementation, including:

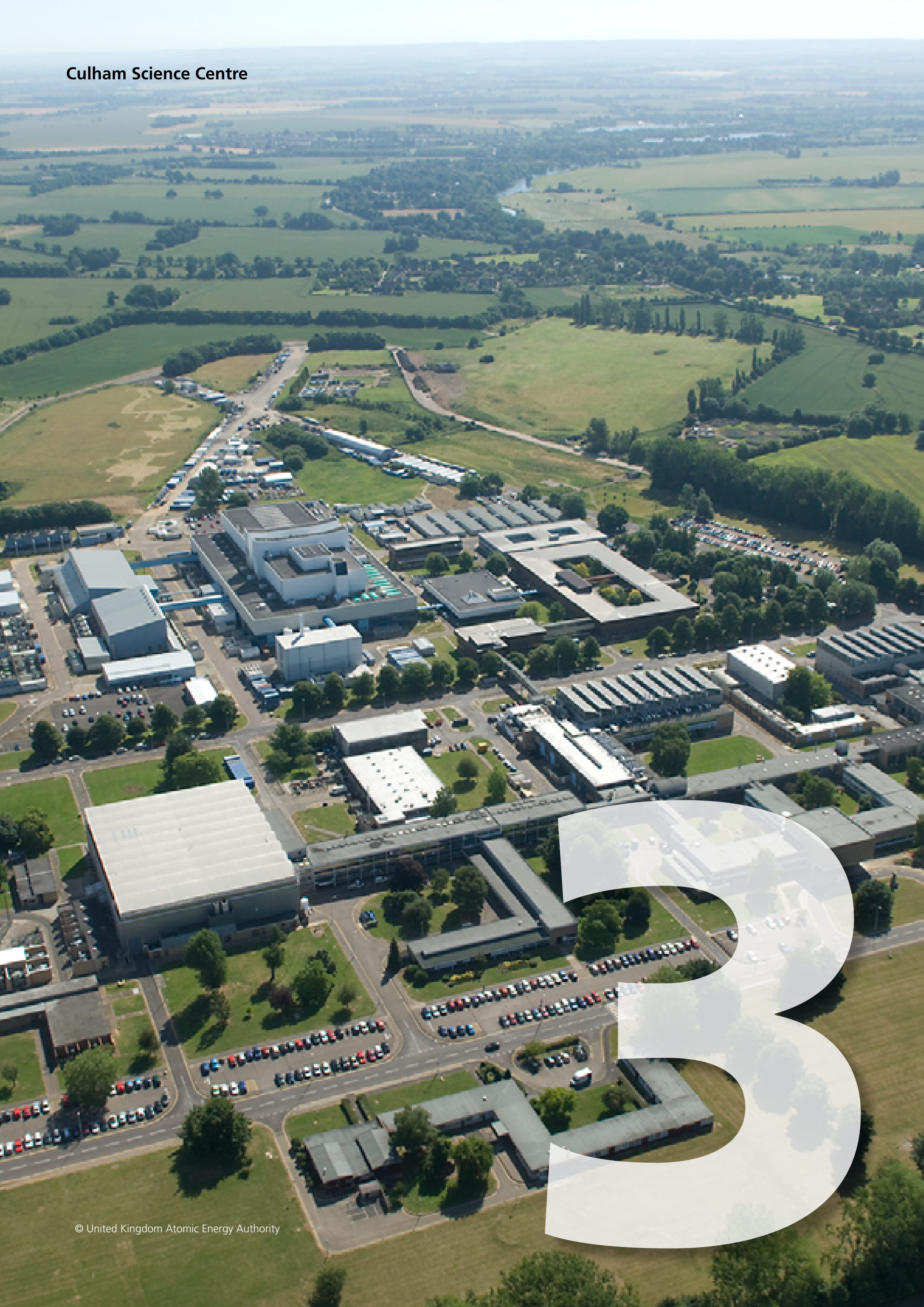
- **Leadership** – influencing decision-making processes (at central government as well as local levels) by representing the "voice of business" from Oxfordshire. For example, we will be leading on Oxfordshire's input and response to the emerging national Industrial Strategy;

- **Delivery** – where there is no natural partner we will take on responsibility for directly delivering key activity. For example, we directly deliver the Oxfordshire Business Support Service and Oxfordshire Apprenticeships;

- **Brokerage** – linking partners and projects with each other and helping access funds through National Government (such as City Deal and Growth Deal Funding) to deliver the objectives of the Strategic Economic Plan. For example, we worked with a range of partners for the Local Growth Fund 3 submission;

- **Facilitation** - working in partnership with partners and wider stakeholders, including the Local Authorities, private and third sector organisations, Universities, FE Colleges and others through our sub groups. This is how we will work with others to implement our related Investment Plans and Strategies, and to support local arrangements for the delivery of new housing.

Culham Science Centre



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3. A profile of Oxfordshire's economy today – and its assets, opportunities and challenges

The economic headlines

Overall, Oxfordshire generates output to the value of about £20.5bn (data for 2014, in current prices, from ONS) from about 400,000 jobs (including both employees and self-employment jobs) in a total of 30,000 enterprises.

Oxfordshire performs well on key metrics of productivity and it is consistently in the upper echelons of league tables relating to the economic performance of LEP areas:

- in 2014, GVA per hour worked in Oxfordshire was an estimated £32.70 – compared to a UK average of £31.00;
- in 2013, GVA per filled job was estimated to be £51.2k; the UK average was £48.8k.

Both activity and employment rates are higher than the regional average – and substantially higher than the national average.

In the year to March 2016, some 358,000 residents aged 16-64 were in employment (whether employed or self-employed). Both activity and employment rates are higher than the regional average – and substantially higher than the national average. The rate of unemployment is very low. Hence Oxfordshire is currently approaching full employment.

The largest employment sectors in Oxfordshire are education (51,000 employees, 14.9% of all employees in employment), professional, scientific and technical (41,000, 12.1%), health (40,000, 11.8%) and retail (32,000, 9.4%). Employment in tourism – which is cross sectoral – accounts for around 32,000 jobs (9.5%)[2]. Oxfordshire also has a large military presence with more than 8,500 military personnel (October 2015) and almost 5,000 family members living and working in the county.

Over the last few years, Oxfordshire's economy has performed strongly, and the scale of recent investment bodes well for future growth. Between 2011 and 2014, the number of jobs in Oxfordshire – including employee and the self-employment jobs – grew by 7.8%, compared to growth of 6.2% nationally. Within this total, employee job numbers grew by 6.3% to 341,500 (compared to 5.3% nationally), while the number of self-employment jobs grew slightly faster. The rate of GVA growth from 2011-14 was also above the national average (15.6%, compared to 12.1% for the UK).

Since 2011, employment growth in Oxfordshire has been much faster than was expected through the forecasts used as the basis for the Strategic Housing Market

2 Sectoral employment is taken from the Business Register and Employment Survey (BRES) – latest data is for 2014, published in the autumn 2015. Employment in tourism is based on figures in the Oxfordshire Creative, Cultural, Heritage and Tourism Investment Plan.

Assessment[3]. The sectors with the biggest increase in employees 2011-14 were professional, scientific and technical (an increase of nearly 7,000 employees), construction (5,500 increase), business administration and support services (3,300 increase) and transport and storage (2,200 increase). A significant proportion of the new jobs in the county, including those in the public sector, have been filled by EU migrant workers[4]. The number of employees in manufacturing and public administration and defence declined by just over 1,000 in each sector over the 2011-14 period.

Science and technology based clusters in Oxfordshire are particularly strong and distinctive, nationally and internationally. By 2014, there were 46,100 employees in high tech sectors in Oxfordshire, 13.5% of total employee jobs in Oxfordshire. GVA growth in key high tech sectors was well above the national average (e.g. GVA in 'information and communication' grew by 29.3% in Oxfordshire between 2011 and 2014, compared with 8.4% in UK). In the 12 months to July 2015, Oxford's technology firms received a reported £1.4bn in investments - more than five times the previous year's total of £250m. Over 20 new Oxford technologies and ventures received a record £2.6m in proof-of-concept funding in 2014 alone. This bodes well for future growth.

By 2014, there were 46,100 employees in high tech sectors in Oxfordshire, 13.5% of total employee jobs in Oxfordshire

Some 85% of Oxfordshire residents in employment live and work in the county. However, both inbound and outbound commuting increased between 2001 and 2011 for all Oxfordshire districts with the exception of South Oxfordshire, where there was a slight fall in out-commuting. In 2011, 57,000 people commuted into Oxfordshire, 10,000 more than in 2001, and there was a daily net inflow to Oxford of nearly 30,000 workers, up 16% since 2001. This increase in commuting has led to increased congestion on the highway network across much of the county.

One reason for increased commuting into Oxfordshire is the high housing costs and associated issues of affordability[5]. According to the recently published National Infrastructure Commission interim report, ratio to house prices in Oxford is 12:1, 50% higher than the national average[6]. It is therefore encouraging that housing completions have increased by 75% over the five years to 2015, compared with a national average of 15%[7]. However, completions remain well below the objectively assessed need: a total of 3,124 new homes were completed in the county in

Williams F1

© Williams F1

3 The Planned Economic growth employment forecasts envisaged growth between 2011 and 2021 of just under 50,000 jobs, which is equivalent to just under 15,000 over the period 2011-14. This compared with actual growth of just over 30,000 jobs – twice the rate forecast.

4 http://www.bbc.co.uk/news/uk-england-oxfordshire-36594311

5 It is notable also that several of the businesses that were consulted in the course of refreshing the SEP commented specifically on the growing incidence of long distance commuting, particularly from the Midlands, as result of housing pressures and prices. The businesses considered that this was not sustainable long term, not least because employees typically "got fed up" after about a year and then moved onto other jobs

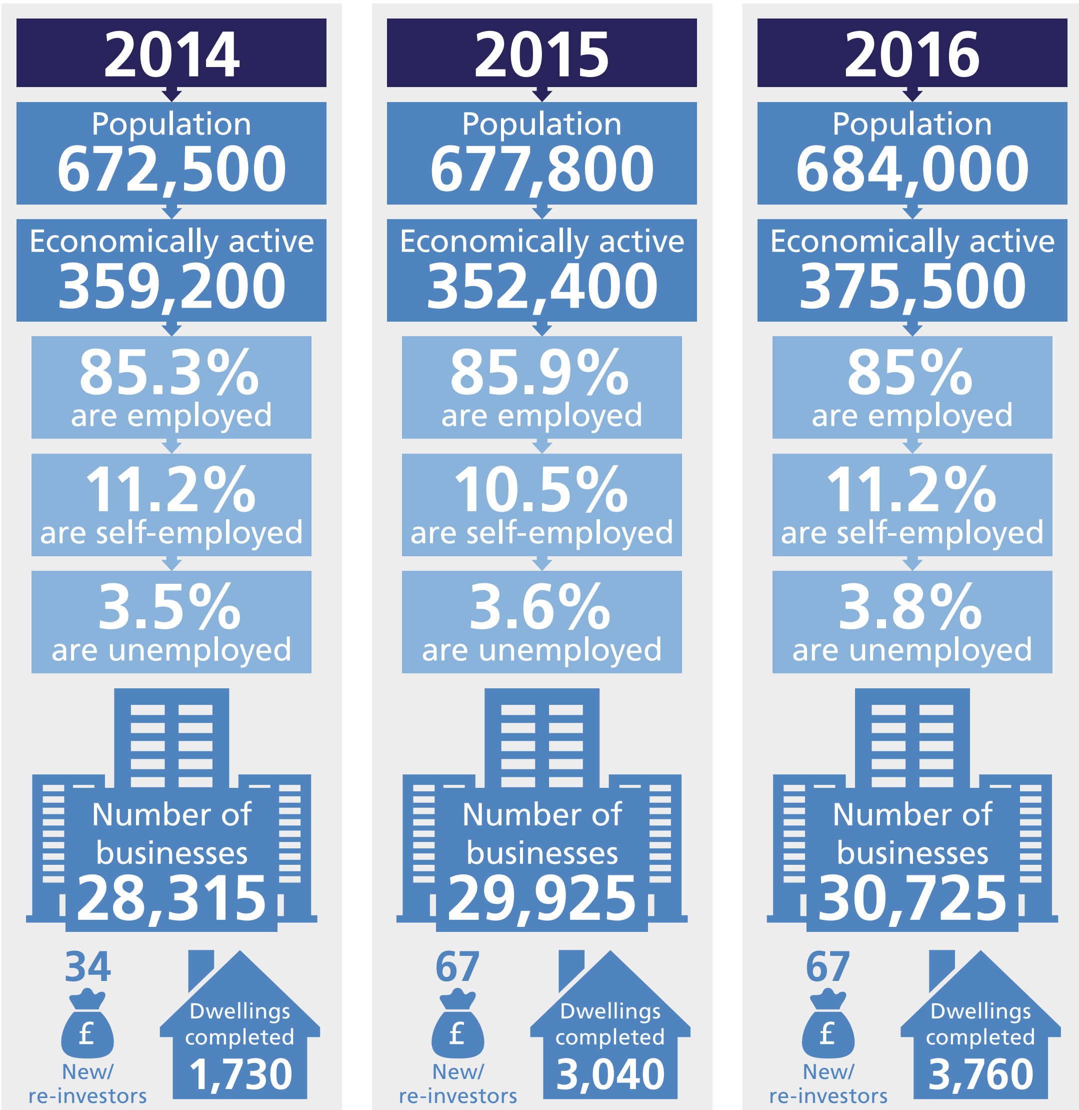
6 Cambridge Milton Keyes Oxford Interim Report, National Infrastructure Commission, November 2016 https://www.gov.uk/government/publications/the-national-infrastructure-commissions-interim-report-into-the-cambridge-milton-keynes-oxford-corridor

7 Sources: local authority annual monitoring reports for the Oxfordshire figure, DCLG for the national figure.

2014/15, compared with a need averaging approximately 5,000 per year[8]. In addition, there is a pressing need for more genuinely affordable homes across the county.

As at October 2016, some 2,715 people in Oxfordshire were claiming Job Seekers Allowance (JSA), or Universal Credit (UC). This equates to an unemployment rate of just 0.6%, compared to 1.8% for Great Britain. Since March 2014, when the first SEP was published, the number of Oxfordshire residents on JSA/UC has declined by nearly 40%. This is to be welcomed. However it does point to the challenges for growing and new businesses seeking to recruit staff from a small pool of potential labour, particular as there are also continuing skills shortages in some key areas (for example, in jobs requiring expertise in STEM subjects[9]). Furthermore, the people claiming benefits are likely to be those who face particular challenges in accessing training and work, meaning that they will need additional and targeted support to help them move closer to the labour market.

Figure 2: Understanding how the economy of Oxfordshire is changing



8 The 'objectively assessed need' for the period up to 2031 was identified in the 2014 Strategic Housing Market Assessment for Oxfordshire, commissioned by the Oxfordshire local authorities.

9 STEM - science, technology, engineering and maths

Oxfordshire's wider assets for economic prosperity

Oxfordshire is home to some of the UK's principal resources for high quality, knowledge-based, economic growth:

- The recent official UK-wide assessment of all university research, the Research Excellence Framework, found that the University of Oxford has the country's largest volume of world-leading research. This research sets academic agendas and the University of Oxford is among the top 5 in the world on every key indicator for both teaching and research. The University of Oxford has had over 50 Nobel Prize winners, more than most countries, and total external research has increased every year for the last 10 years, reaching £523m in 2014/15;

- Oxford Brookes University is among the best of the newer universities nationally and consistently ranks within the top 10 universities in the UK for income from intellectual property, reflecting the strong impact of its research;

Howbery Park, Wallingford

- There is a unique grouping of 'big science' and other research facilities, primarily in Science Vale in the south of Oxfordshire, including the Culham Centre for Fusion Energy and – at Harwell – the Science and Technology Facilities Council (STFC) Rutherford Appleton Laboratory; Diamond Light Source, the national synchrotron facility; the ISIS Pulsed Neutron Source; the Central Laser facility; the UK Space Gateway, including the Satellite Applications Catapult Centre; the European Space Agency; and the Medical Research Council's facilities;

- Oxfordshire has some outstanding and fast-growing businesses with names that are widely recognised around the world, ranging from newer companies like

Adaptimmune and Immunocore to more established ones like Sophos, Williams F1, Oxford Instruments and Blackwell, and global brands such as BMW, Siemens, Unipart and Oxford University Press;

- There is momentum linked to Science Vale Oxford, three Enterprise Zones (at Harwell, Didcot and Milton Park), two Garden Towns (Bicester and Didcot) and an increasing supply of specialist science and business parks and incubator space (for example, at Begbroke, Bicester Business Park, Harwell Science and Innovation Campus, Howbery Park, Milton Park, and Oxford Science Park).

- There is improving access to long term risk capital, particularly through the establishment of two major new funds in 2015:

  » University of Oxford and Oxford University Innovation (the University's technology commercialisation subsidiary) launched a partnership with newly created Oxford Sciences Innovation plc (OSI) to invest £320m in science and technology-based spin-outs from Oxfordshire's research facilities;

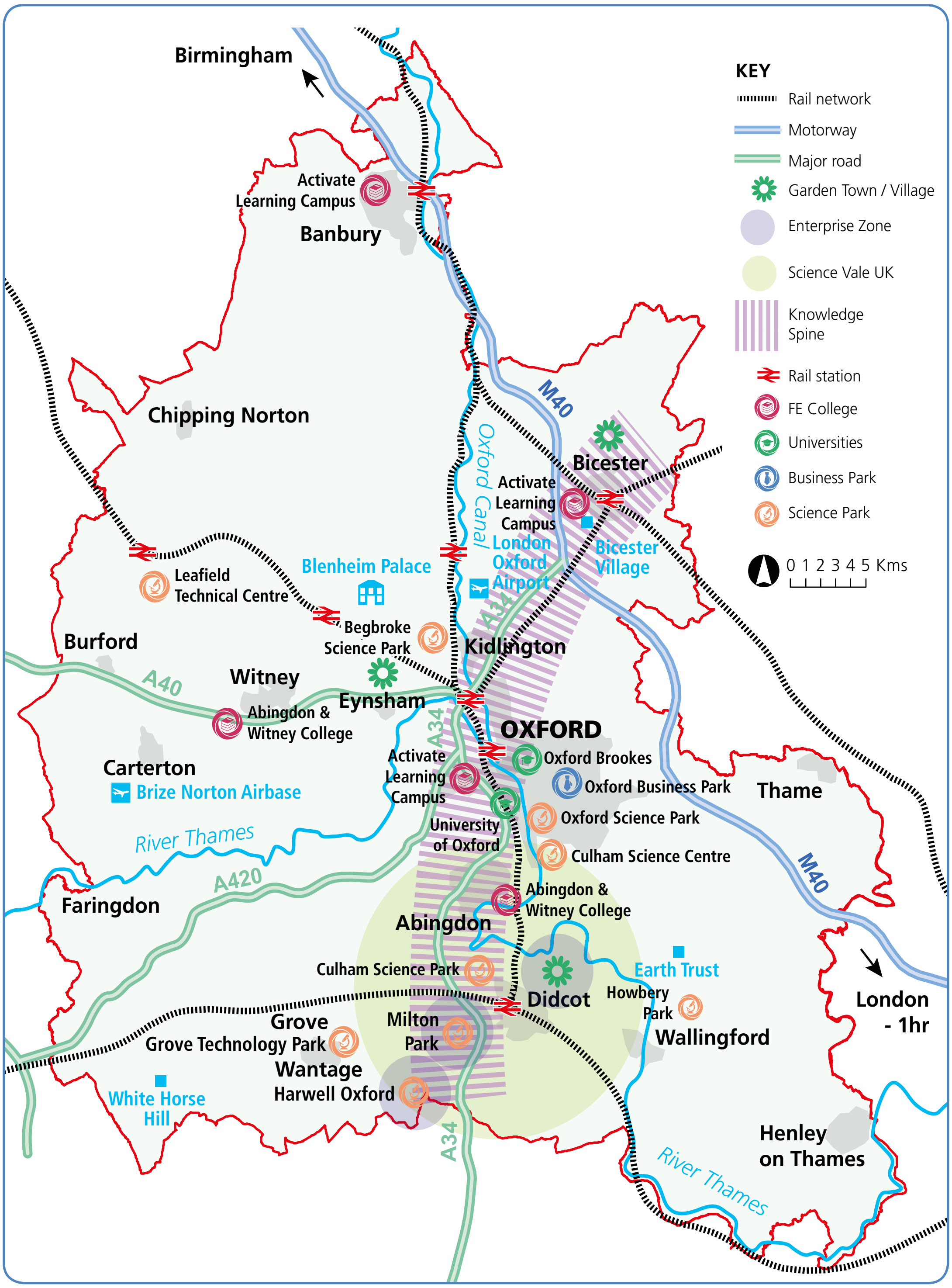
  » the Woodford Patient Capital fund, based in Oxfordshire, raised £890m at launch.

- Oxfordshire has a strategic location – which is close to both a booming world city (London) and a global hub airport (Heathrow); and is an integral part of the UK's Golden Triangle (defined between Cambridge, London and Oxford), and in the Cambridge – Milton Keynes – Oxford corridor, recognised as the UKs potential Silicon Valley by the National Infrastructure Commission.[10]

BMW Plant, Oxford

10 https://www.gov.uk/government/publications/the-national-infrastructure-commissions-interim-report-into-the-cambridge-milton-keynes-oxford-corridor

Figure 3: Oxfordshire's Strategic Economic Assets



Oxfordshire's built heritage and natural environment have played a substantial part in the county's economic and social development and they will continue to be a vital part of its future

The economic importance of our built and natural environmental assets

Oxfordshire's built heritage and natural environment have played a substantial part in the county's economic and social development and they will continue to be a vital part of its future. Many of Oxfordshire's towns and villages are attractive and vibrant places in which to live, work and relax. The county's natural capital – including its land, soils, air, water, animals and plants – is distinctively rich and diverse. Oxfordshire's urban and rural heritage is outstanding. The county's residents, businesses and other organisations – wherever they are located – all benefit economically, socially and culturally from these assets.

However, some of these assets are in decline or under threat, and investment is needed to reverse this damage. As the economy and the population grow, and the effects of current and future climate change are felt[11], the county needs to be prepared in order to minimise damage to the natural environment, build resilience and reduce risk.

It would be misleading to suggest that economic growth does not give rise to environmental pressures. However, Oxfordshire has some real opportunities to apply local research and innovation to repair and enhance its natural capital as well as the built environment. For example, Oxfordshire has world leading research and commercialisation in areas such as solar and fusion energy and electric vehicles, and low carbon sectors already account for about 7% of the economy. Well targeted investments can bring about multiple benefits including added economic value, more efficient use and greater protection of natural resources and more pleasant surroundings, all of which make the county a more desirable place to live and work.

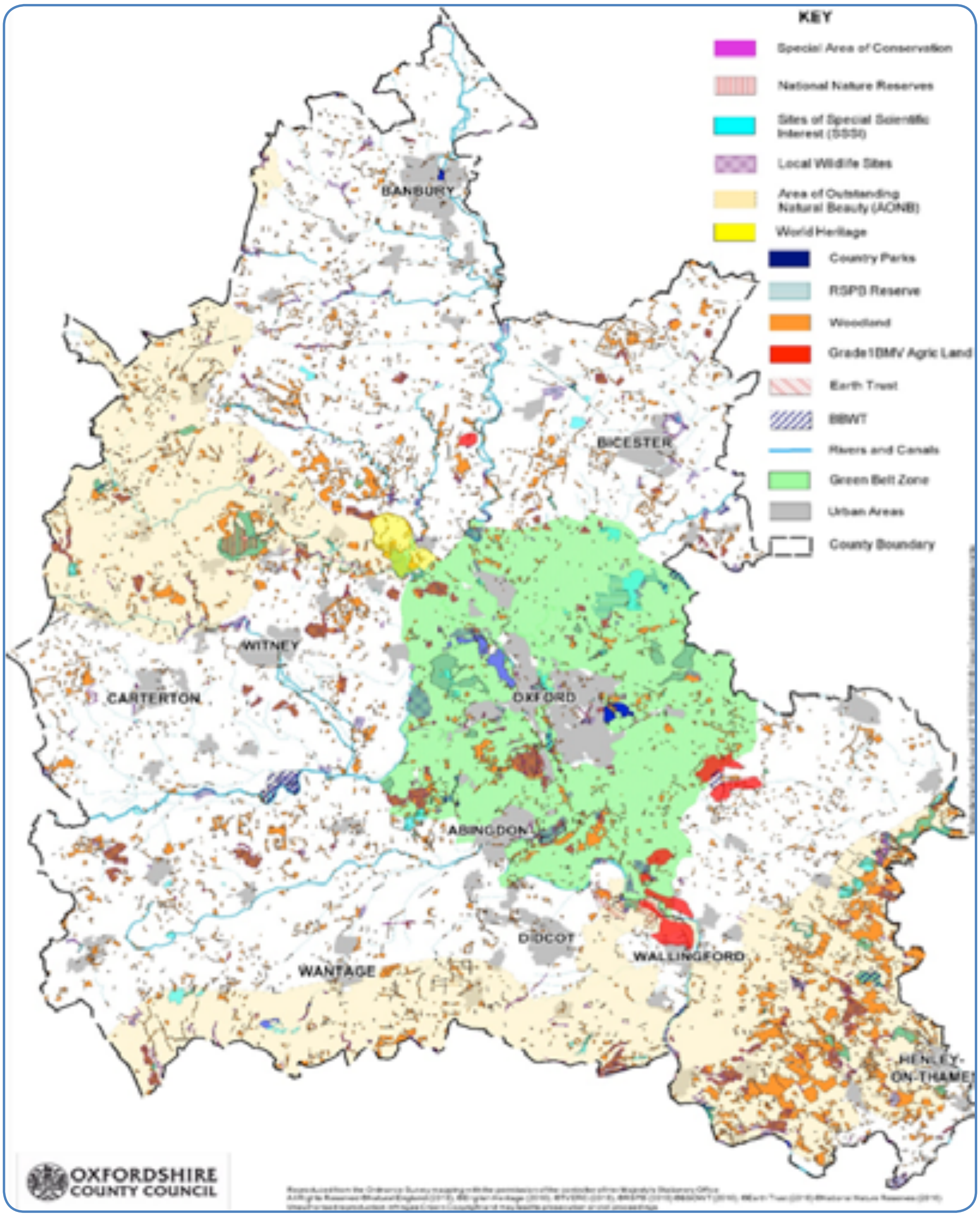
The outstanding quality of its natural and built environment – and the importance of both in relation to its economic well-being – is described in two plans we have produced with partners since the 2014 SEP: the Strategic Environmental and Economic Investment Plan (SEEIP) and the Creative, Cultural Heritage and Tourism Investment Plan (CCHTIP). These two documents provide a great deal of evidence and insight with regard to the economic importance of our natural and built environment, and also the way in which sustainable economic development can support the successful management of our environmental assets (see Annex B for a summary of the plans).

Sutton Courtenay

Oxfordshire's economic assets are second to none – particularly in combination with its environmental, heritage-related and cultural resources. With them come real opportunities and challenges in relation to economic growth – and, for the people of Oxfordshire and for OxLEP, some responsibilities.

11 See Oxfordshire's Low Carbon Economy – Report by the Environmental Change Institute and Low Carbon Oxford, October 2014

Figure 4: Oxfordshire's Strategic Environmental Assets



Economic geography

Against this backdrop, Oxfordshire has a very distinctive economic geography. Most of the county is within an Oxford Travel to Work Area (as defined at the time of the 2011 Census). Banbury – in the north – has a TTWA of its own (which extends into Northamptonshire) and parts of southern Oxfordshire are contained within the Reading TTWA, but Oxford is – demonstrably – the county's functional centre. The urban area of Oxford (including Botley which is in Vale of White Horse district) has a population of around 160,000 – slightly larger than that of the area administered by Oxford City Council. But on either definition, the city accounts for just under a quarter of the county's population, and around 30% of all the jobs in Oxfordshire.

Outside Oxford, the major settlements are stand-alone towns with a distinctive character – Bicester and Banbury in Cherwell; Witney and Carterton in West Oxfordshire; Didcot, and Henley-on-Thames in South Oxfordshire; and Abingdon and Grove & Wantage in Vale of White Horse. These towns differ substantially from each other and many of them are set to see significant planned growth.

Much of Oxfordshire is rural. Parts of the county are of an extremely high environmental quality. Indeed, Oxfordshire overlaps with three different Areas of Outstanding Natural Beauty (Cotswolds, North Wessex Downs and Chilterns). Blenheim Palace and its Estate is a World Heritage Site, reflecting its cultural and historical significance.

The area surrounding Oxford is Green Belt – a planning designation which was established to control unplanned urban extensions, and, in the case of historic cities like Oxford, to preserve its setting and special character.

These are the particular spatial characteristics of a county which is both distinctive and beautiful. In a fast growing place such as Oxfordshire it is inevitable that at times there may be conflicts between economic development, environment assets and the Green Belt. However, if development is planned and delivered well, with adequate resources – and if natural resources are appropriately valued – the outcome should be net environmental gains.

River Thames at Wallingford

© Experience Oxfordshire

Oxford Brookes University, Headingdon Campus

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4. Progress in delivering our Strategic Economic Plan 2014

Our original SEP included a series of Objectives, structured under each of the four Programmes. For the most part, the timescale for the delivery of these Objectives was through to 2030/31, so two years in, we still have some way to go. However, we are making good progress[12]. This section provides an overview of the progress made so far. This has been made possible by the LEP securing, in collaboration with partners, substantial funds through the Oxfordshire City Deal, Local Growth Fund and the European Structural Investment Fund (European Social Fund - ESF, European Regional Development Fund - ERDF, European Agricultural Fund for Rural Development - EAFRD). The table below summarises the funding secured and the leverage and outputs it will provide.

Table 1: Funding secured by the LEP with support from partners in the last two years[13]

Source	Amount secured	Leverage	Total investment	Expected outputs
City Deal (January 2014)	£55.6m	£1,264.5m	£1,320.1m	18,000 jobs, 7,500 homes, by 2021
Growth Deal 1 (January 2015)	c£108.5m	c£100m	c£208.5m	6,000 jobs, 4,000 homes, by 2021
Growth Deal 2 (January 2015)	£9.9m	£593.5m	£603.4m	1,795 jobs by 2021
Total	**£174m**	**£1,958**	**£2,132m**	

Table 2: European Structural Investment Funds[14]

Source	Amount allocated	Expected outputs
European Regional Development Fund	€9.9m	754 business supported
European Social Fund	€9.4m	1,000 people helped into training and work
European Agricultural Fund for Rural Development	€3.4m	To Be Confirmed[16]
Total	**€22.7m**	

12 More detail is available in our Progress Report, 2011-2015

13 The outcome of our LGF 3 submission is not known at the time of writing. We will produce an addendum to this SEP once the outcome is confirmed.

14 The Chancellor Phillip Hammond has announced that the Treasury will guarantee that projects will be funded even after the UK has exited to EU.

15 The EAFRD programme for Oxfordshire has changed significantly due to Brexit and we are working with Defra on a revised programme, to be published in early 2017

One element of progress is the production of four cross cutting plans intended to support implementation of the SEP. These include the Strategic Environmental and Economic Investment Plan (SEEIP), the Creative, Cultural Heritage and Tourism Investment Plan (CCHTIP), the Innovation Strategy and the Oxfordshire Skills Strategy. The main provisions of all four are summarised below; more detailed synopses are available in Annex B.

Figure 5: Oxfordshire's Strategic Economic Plan – and four cross-cutting strategies which underpin it

	People	Place	Enterprise	Connectivity
Strategic Environmental Economic Investment Plan	Engaging people in the environment and enabling more sustainable lifestyles	Enhancing the quality and resilience of urban areas Improving the management of land to reduce flood risk, enhance water resources, and promote biodiversity	Growing the green economy in Oxfordshire	Promoting and enabling access to the countryside
Creativity, Cultural, Heritage and Tourism Investment Plan	Productive and engaging experiences Skills, talent development and business growth	Creative place-making	Skills, talent development and business growth	Collaboration
Oxfordshire Innovation Strategy	Innovation for all Innovation for social good Nurturing talent and developing skills	Building innovation spaces	Reinforcing the science and research base for innovation Attracting significant business Attracting capital Embedding innovation in the ecosystem	Understanding the Ecosystem: Strengthening our Networks
Oxfordshire Skills Strategy	Creating a skills continuum to support young people through their learning journey Upskilling and improving the chances of young people and adults marginalised or disadvantaged from work To increase the number of apprenticeship opportunities		To meet the needs of local employers through a more integrated and responsive approach to education and training To explore how we can better retain graduates within Oxfordshire to meet the demand for higher level skills our businesses need.	

Alongside projects funded through City Deal and Local Growth Fund (see Tables 3 and 4 below), the following paragraphs summarise other aspects of progress, structured around the four SEP programmes (people, place, enterprise and connectivity). The LEP's role in delivery varies; in some areas it takes a leadership role and seeks to influence decision-making by others, locally and in government nationally; in other areas, it acts as the main delivery organisation; in others, it acts as a broker – for example, linking partners to each other and to sources of funding – or a facilitator (working with partners, with them in the lead delivery role).

Our O2i programme (Opportunities to Inspire) is promoting greater collaboration between schools and local businesses, and helping to inspire our young people and make them aware of the employment and career opportunities within Oxfordshire.

Annex A provides a more detailed analysis of progress in relation to specific commitments in the original SEP.

In relation to People…

We have seen employment and activity rates rise in Oxfordshire, ensuring that more people are contributing to – and benefitting from – our growing economy. Over the last two years, we have also seen a greater uptake in apprenticeships through our Oxfordshire Apprenticeships Programme.

Our O2i programme (Opportunities to Inspire) is promoting greater collaboration between schools and local businesses, and helping to inspire our young people and make them aware of the employment and career opportunities within Oxfordshire.

Our European Social Fund programme is starting to deliver. Activate Learning has recently won a contract to run Building Better Opportunities, a £1.2 m project that will help more than 300 Oxfordshire residents who are long term unemployed access the labour market. The three-year project will run to 2019.

In relation to Place…

We have made substantial headway in relation to some major new schemes. These include some with outstanding credentials for sustainability (e.g. North West Bicester and the newly designated Didcot Garden Town) and innovation (e.g. Graven Hill), and which are also providing a focus for both housing and jobs growth.

The District Local Plans are all moving through the plan making process. The Cherwell Local Plan has already been adopted and Oxford City Council's Local Plan 2011 is now

Technology Campus, Oxford

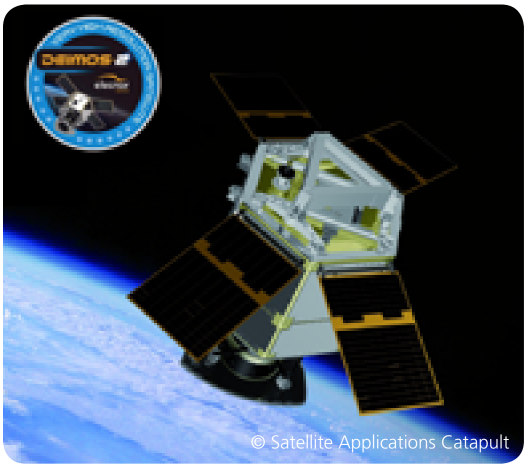
being revised for the period up to 2036. South Oxfordshire DC will submit their Local Plan 2031 to the Secretary of State in May 2017, with a view to adoption in April 2018. The Vale of the White Horse District Local Plan Part 1 is now adopted, and Part 2, setting out Preferred Options for development to meet Oxford's unmet housing need, will go out for public consultation in February 2017. West Oxfordshire's Local Plan to 2031 is currently out for public consultation.

This has helped accelerate housing delivery, which has increased by 75% over the last five years. However, the scale of housebuilding is still well below the objectively assessed need (as evidenced in the Strategic Housing Market Assessment for Oxfordshire), and housing costs have continued to increase relative to incomes, with the result that Oxfordshire is among the least affordable places in the country to live.

In relation to Enterprise…

More jobs have been created within Oxfordshire than were anticipated through the forecasts that informed the Strategic Housing Market Assessment. This process has been bolstered by macro-economic conditions, but there has also been an impact from some of our early local initiatives and from the City Deal – notably the creation of the Enterprise Zones. The focus on jobs growth through implementing key projects is even more important following the Brexit decision and consequent economic uncertainty.

Deimos 2



© Satellite Applications Catapult

We have seen some major investments in our science and knowledge-based infrastructure and these should lead to further economic growth downstream.

We have seen some major investments in our science and knowledge-based infrastructure and these should lead to further economic growth downstream. For example, we have seen investment in the Satellite Applications Catapult at Harwell, the Begbroke Accelerator and the Oxford Bioescalator.

In addition, we have been delivering some major projects such as Oxfordshire Business Support (OBS). This promotes, co-ordinates and delivers support to local business to help them develop and grow. It also provides a mechanism for integrating national and local business support. It is targeted at start-ups, high growth SMEs, social enterprises and innovative entrepreneurs via a range of free or subsidised products and services. During 2015/16, nearly 12,000 businesses and individuals engaged with the OBS helpline and website, and almost 700 of these were supported via the Triage system and also through our Network Navigators.

Our Invest in Oxfordshire service continues to foster greater Foreign Direct Investment in Oxfordshire by helping overseas and domestic businesses locate in the county. In 2015/16, Invest in Oxfordshire handled 169 enquiries, of which 33% were from UK companies and 67% from foreign firms. 43 of these inquiries were from companies in the life sciences sector, 34 from the creative sector and 21 from automotive and advanced engineering.

Around 80,000 premises across Oxfordshire now have access to faster broadband as a result of the Better Broadband for Oxfordshire roll-out, including many in some of the more difficult to reach parts of the county

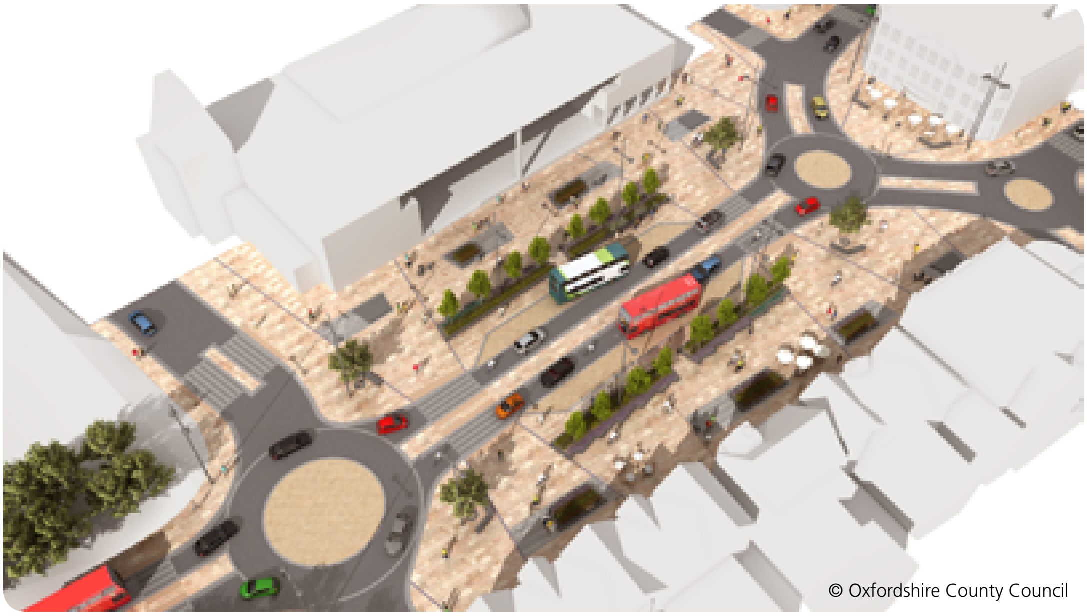
In relation to Connectivity…

We have seen significant investments and improvements – notably the opening of Oxford Parkway railway station, with a fast direct link to London Marylebone – the first new line linking the capital to a major city for 100 years, and also enhancements to the coverage of superfast broadband county-wide. Around 80,000 premises across Oxfordshire now have access to faster broadband as a result of the Better Broadband for Oxfordshire roll-out, including many in some of the more difficult to reach parts of the county. Of those 80,000, more than 64,500 households and businesses have access to 'superfast' broadband speeds of 24 megabits and above[16].

We have advanced a number of innovative collaborations, focused on connectivity; this includes (for example) working on major data analytics projects. We have sought to advance innovative solutions linked, for example, to the interface between energy and mobility.

However, the evidence suggests that congestion on our roads is continuing to increase. Whilst there have been some important incremental improvements (including to junctions on the A34), the scale of the challenge remains substantial.

Artist impression of Frideswide Square, Oxford



© Oxfordshire County Council

Table 3 opposite shows the projects funded through City Deal and Tables 4 and 5 show those funded via Local Growth Fund.

16 http://www.betterbroadbandoxfordshire.org.uk/cms/content/track-budget-and-time

Table 3: Oxfordshire's City Deal

Projects	City Deal funding	Total investment
Harwell Innovation Hub - a new facility focussed on promoting open innovation based at the Harwell Campus. Delivered by The Science and Technology Facilities Council.	£7m	£14.1m
Culham Advanced Manufacturing Hub - a new facility focussed on remote handling, with applications across a number of different industries where there are extreme environments (nuclear, space, underwater, underground. Delivered by the United Kingdom Atomic Energy Authority.	£7.8m	£21.2m
Oxford BioEscalator - a new-breed of incubator space to nurture small spin-off companies in the life science sector with the capacity to grow into mid-sized companies. Situated in the Old Road Campus in Oxford, it will allow co-location with hospital and research facilities and staff and sharing equipment that allow "adjacent innovation" to develop at scale. It will also support single teams to manage multiple biotech companies which will significantly reduce management costs. Delivered by The University of Oxford.	£11m	£21m
Begbroke Innovation Accelerator - a new facility located at Begbroke Science Park, focused on the advanced engineering sectors of automotive, nuclear materials, advanced materials, robotics, as well as in nano-medicine, pharmaceuticals, motorsport and supercomputing. Delivered by The University of Oxford.	£4.2m	£11.2m
Oxfordshire Innovation Support for Business - a tailored business support programme which will bring together a network of existing provision, amplify and enhance existing services to businesses and plug gaps with bespoke programmes in order to promote innovation based growth. Delivered by the Oxfordshire LEP.	£2m	£7m

Projects	City Deal funding	Total investment
A package of measures that will **improve access to the Science Vale Oxford Enterprise Zone** from the national and local road network. This will increase reliability – and in turn provide the confidence necessary to attract business investment and high skilled employees. Delivered by Oxfordshire County Council.	£6.1m	£28.8m
Schemes to support the regeneration of Oxford's Northern Gateway and the A40 approaches to Oxford. The package of measures will relieve congestion and deliver growth at the Northern Gateway development site. Delivered by Oxfordshire County Council.	£7.3m	£17.8m
A programme to increase the number of young people taking up **Apprenticeships**, with a particular focus on courses that will support Oxfordshire's growth sectors: advanced engineering and manufacturing; space technology and biosciences. Delivered by Oxfordshire LEP.	£1.5m	£25.5m
The first phase of **Oxford Science Transit** is a fully integrated public transport system that connects the area's centres of innovation and economic growth with the two universities. Delivered by Oxfordshire County Council	£8.7m	£23.5m

Table 4: Local Growth 1 Fund secured for projects

Project	LGF	Total investment
Oxford Science Transit Phase 2 – support to expand the integrated public transport system along the Knowledge Spine. Delivered by Oxfordshire County Council.	£35m	£40m
Centre for Applied Superconductivity - a new centre of innovation to coordinate the interaction between key industry players, Oxford University, cryogenics companies, and end users (including SMEs). Delivered by The University of Oxford.	£4.5m	£6.5m

Project	LGF	Total investment
Oxfordshire Centre for Technology and Innovation - development of a Technology and Innovation Training Centre in Oxford to address skills shortages across engineering, electrical, design, and emerging technologies. Delivered by Activate Learning.	£4.5m	£7.9m
Didcot Station Car Park Expansion - packages of measures for car park expansion. Part of the expansion and improvement of Didcot station as a key gateway to Science Vale high tech cluster and the Enterprise Zone. Delivered by Great Western Railway.	£9.5m	£23m
Advanced Engineering and Technology Skills Centre – a collaboration with Abingdon and Witney college, the centre will address skills shortages in Science Technology Engineering and Maths subject areas by supplying skilled technicians at Harwell Oxford and elsewhere in Oxfordshire; and deploying the unique expertise and facilities available at and around Harwell Oxford as a learning resource for the rest of the UK and globally. Delivered by Abingdon and Witney College.	£4m	£5.9m
Bicester London Road – a pedestrian/cycle crossing to provide sustainable access to Bicester town centre, required for the more intensive train service as part of the East West Rail project. Delivered by Oxfordshire County Council.	£1.3m	£3.6m
Local Transport Board funding	£10.6m	£10.6m
Headington Phase 1 and Eastern Arc Transport Improvements – a package of junction and local road improvements to support growth in the Headington area. Delivered by Oxfordshire County Council.	£8.2m	£12.5m
Oxfordshire Flood Risk Management Scheme and Upstream Flood Storage at Northway – a package of measures to mitigate the risks of damage to homes, businesses and transport connections caused by excessive flooding.	£26.5m	£90.3m

Project	LGF	Total investment
Science Vale Cycle Network – a sustainable transport scheme providing greater connectivity between Science Vale and the newly improved Didcot station by bike.	£4.5m	£4.9m

Table 5: Local Growth Fund 2 secured for projects

Project	LGF	Total investment
Northern Gateway – a package to improve transport in North Oxford and enable the Northern Gateway development, which will provide business and research space, and new homes. Delivered by Oxford City Council.	£5.9m	£452.5
Oxpens – transport and site improvements to support the Oxpens development, which will provide office and research space and new homes in the heart of Oxford. Delivered by Oxford City Council.	£3.5m	£150m
Activate Care Suite – to improve adult social care and health. Delivered by Activate Learning.	£0.4m	£0.6m

Activate Care Suite, Oxford

© Activate Learning

Dreaming spires, Oxford

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5. Our Vision

Our vision is Oxfordshire as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence

Oxfordshire is set apart by the excellence and scale of **innovation**, **enterprise** and **research** within the county:

- **Innovation** is the application of new ideas in any context and permeates Oxfordshire's economic life. It includes innovation driven by science and technology, particularly in the life sciences, space technologies, digital sectors, and the automotive and motorsport industries. It includes innovation in heritage, tourism and culture; and in the use of environmental assets and sustainable technologies. It also includes social innovation. It abounds in, for example, service delivery, whether by the public sector, private sector or through voluntary sector organisations. Throughout, the process of innovation is one of Oxfordshire's strengths: a survey by the European Research Council found that firms in Oxfordshire reported the most innovation activity compared to other regions in the UK. We will seek to harness this fully to deliver our Vision;

Nearly 90% of Oxfordshire enterprises employ fewer than 10 people, but these smaller businesses are a dynamic element in the enterprise mix

- **Enterprise** is another defining feature of Oxfordshire. Within the county, there are around 30,000 enterprises. As described above these range from major companies through to micro businesses. Nearly 90% of Oxfordshire enterprises employ fewer than 10 people, but these smaller businesses are a dynamic element in the enterprise mix. Oxfordshire's enterprises span fast-emerging global players in knowledge-based sectors and firms that are focused on service delivery in local markets. Within Oxfordshire, there is also a vibrant social enterprise sector;

- **Research** undertaken in Oxfordshire is outstanding. It includes world-leading research under the auspices of the University of Oxford and Oxford Brookes University. Harwell and Culham are major foci for "big science", and there are significant numbers of businesses that undertake leading-edge research and development. Oxfordshire's research excellence is underpinned by world class science. At the same time, the county can genuinely claim global specialisms in social science and the humanities, with widespread potential applications.

By linking these three overarching themes, we will ensure that by 2030, Oxfordshire's economy is widely recognised to be:

- **Vibrant:** Oxfordshire will be a place where ambitious businesses and people thrive; and where young people choose to build their careers and their lives, contributing to the vibrancy of Oxfordshire's communities;

- **Sustainable:** Oxfordshire will be on a trajectory for growth that is sustainable environmentally (taking into account climate change, carbon emissions, heritage, the natural environment and patterns of resource use), socially (reflecting the needs and character of communities) and economically (with businesses and others choosing to re-invest);

- **Inclusive:** Oxfordshire will be a place in which all residents – irrespective of age, gender, or ethnicity – have a real stake in determining the county's future economic narrative and contributing fully to it;

- **World-leading:** Oxfordshire will be a place that is recognised globally for its dynamic innovation ecosystem, founded on world class research and fuelled by enterprise, all within an environment of the highest quality.

Proposed new Rail Station, Oxford

© Oxford City Council

River Thames, Abingdon

6. Our Programmes

In order to realise our Vision, our Plan is structured around priorities which define four Programmes.

Harnessing…
- Innovation
- Enterprise
- Research excellence

…through four Programmes focused on…
- People
- Place
- Enterprise
- Connectivity

… to make Oxfordshire more
Vibrant
Sustainable
Inclusive
World-leading

These four Programmes are:

People – delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, filling skills gaps, and seeking to ensure full, inclusive, employment and fulfilling jobs;

Place – ensuring a strong link between jobs and housing growth, and providing a quality environment that supports and sustains growth; and offering the choice of business premises and homes (including more homes that are genuinely affordable) needed to support sustainable growth whilst capitalising on and valuing our exceptional quality of life, vibrant economy and urban and rural communities;

Enterprise – emphasising innovation-led growth, underpinned by the strength of Oxfordshire's research, business collaboration and supply chain potential; recognising and reinforcing the significant contribution made by all sectors, in all parts of Oxfordshire and all types of business;

Connectivity – enabling people, goods and services to move more freely, connect more easily; improving broadband and mobile coverage and capacity; and providing the services, environment and facilities needed by a dynamic, growing and dispersed economy.

These four programmes are closely inter-related and inter-dependent. To support economic growth, firms need access to an appropriate range of supporting infrastructure and services, to manage the significant uncertainties of the global economic environment, and to be able to recruit and retain appropriately skilled people. These people need housing which is affordable, located in attractive places which provide an appropriate mix of services and facilities, and which are well connected to other places within and beyond Oxfordshire by physical and digital links.

Under each programme the following sections provide a summary of current characteristics (including a headline Strengths, Weaknesses, Opportunities and

Threats - SWOT) and identify a set of priorities (areas of intervention which are most important to delivering the SEP and are expected to have lasting relevance) and actions (more specific interventions which are in general time limited and will be supplemented by additional actions over time). Annex D shows how, under each Programme, priorities relate to actions.

The scale of growth envisaged

The SEP is based on the scale of growth set out in each of the District and City Council's adopted and emerging Local Plans, which for Oxfordshire as a whole involves an additional 85,600 jobs between 2011 and 2031 and approximately 100,000 new homes.

To put this in context, between 1991 and 2011, total jobs in the county increased by 94,000, or 42%, compared to the forecast jobs growth of 23% between 2011 and 2031. Each Local Plan is subject to full Strategic Environmental Impact Assessment to provide reassurance that the consequences of the planned growth have been properly considered and mitigated.

Should the scale of planned growth be adjusted in future revisions to Local Plans – either upwards or downwards – then the SEP will be reviewed accordingly.

Spatial dimensions

Improved connectivity with adjoining areas is also important for Oxfordshire's economy, including the market towns which in many cases have strong cross boundary functional links

There are important inter-relationships between the programme areas and the economic geography of Oxfordshire. The main locations for housing and employment growth will be within the Oxfordshire Knowledge Spine (see Figure 3) – stretching from Bicester in the north through Oxford to Science Vale in the south (including the major research centres at Harwell, Culham, the growing towns of Didcot, Grove and Wantage, and major employment areas such as at Milton Park and Harwell). This spatial focus is reflected in the adopted and emerging Local Plans within Oxfordshire, and in the scale and location of investment in the infrastructure for research, enterprise and connectivity in the county.

However, this spatial focus is not exclusive. There are many important firms and economic assets elsewhere in the county, and we will continue to encourage and support projects in the market towns and rural areas which help implement the SEP. We will also ensure other areas are well connected into the Knowledge Spine, so that the benefits of economic growth are accessible to all. Improved connectivity with adjoining areas is also important for Oxfordshire's economy, including the market towns which in many cases have strong cross boundary functional links (for example, the high performance engineering cluster extends across much of Oxfordshire, Northamptonshire and Bedfordshire; whilst the Cotswold tourism offer extends across west Oxfordshire and Gloucestershire; and the Thames Valley IT cluster extends across southern Oxfordshire and Berkshire).

Activate Care Suite Students, Oxford

7. People

Headline SWOT assessment - People

Strengths and opportunities
• Highly qualified workforce • Very attractive place to live and work • Globally leading research and firms working at the leading edge of technology attract the best talent to Oxfordshire • Large student population, providing recruitment opportunities for local firms • Buoyant labour market – less than 2,700 JSA claimants (0.6%) across the county – the lowest nationally
Weaknesses and threats
• Housing in Oxfordshire is among the least affordable in the country • Rapidly ageing population with a declining working age labour force • Pockets of social and economic exclusion, especially in Oxford • Very tight labour market – difficult for employers to recruit • Future recruitment and retention of specialist expertise may be threatened by Brexit-related uncertainty concerning foreign nationals working in Oxfordshire

Current characteristics

Oxfordshire's people are the county's principal resource in supporting the next phase of economic growth: they are versatile, adaptable, highly skilled and in great demand.

Employers, however, are struggling to recruit the people they need[17] with the skills that they require against a backdrop of (close to) full employment. Moreover, particularly for younger working age residents, Oxfordshire is a very expensive area to live and work, and retention problems are widespread in the early adult age groups.

As we explain later in the Place section, the affordability of housing across the county is a major concern for local people who are not already home-owners, and those wanting to move to jobs in the county. The challenges are acute for younger people and those in less well-paid jobs. For example, there is clear evidence[18] that high housing costs are affecting Oxfordshire's ability to recruit and retain nurses and teachers – key professions in terms of the county's overall quality of life.

ONS's sub-national population projections suggest that within Oxfordshire, the population aged 20-64 is set to decline through to 2037 (whilst the overall population will increase by over 13%). However, this will depend on the scale of housing growth actually achieved.

In addition, there are very challenging issues with regard to social inclusion. The scale is not great overall – but in many respects, that makes the challenges harder as the issues of exclusion can easily be overlooked against a background of general

17 According to the UKCES Employer Skills Survey, in Oxfordshire 2013, 8% of employers (c 1800 businesses) were reporting hard to fill vacancies where impacting on their business (compared to 5% nationally).

18 http://www.oxfordmail.co.uk/news/13439073.New_homes_for_key_workers____could_be____affordable____at_last/

prosperity. There is a need for excellent and creative responses to help more disadvantaged Oxfordshire residents to move into the local labour market.

There is a need for excellent and creative responses to help more disadvantaged Oxfordshire residents to move into the local labour market.

Currently, the landscape for the delivery of post-16 training and education is being restructured. Oxfordshire is part of an Area Review process, the aim of which is to ensure a better alignment between providers, firms and learners, with the needs of the economy firmly in view. Moreover, appropriate skills provision needs to feature in any devolution deal that Oxfordshire partners agree with government.

Self-employment is increasingly important, particularly in Oxfordshire's rural areas, and there is a need to support the distinctive needs of the self-employed, for example through the provision of on-line advice and guidance for remoter businesses and sole traders, and encouragement to build homes which are designed to enable home working.

Priorities to 2020

The following priorities are identified in order to deliver the SEP:

Education and skills

- ensure that skills provision is aligned more effectively with the needs of employers;
- understand – and respond to – the aspirations and frustrations of young people as they seek to build their lives and their careers in Oxfordshire, by ensuring there is a variety of mechanisms (e.g. education-business links, labour market intelligence, work experience) to support them through their learning journey;
- increase Science, Technology, Engineering & Maths (STEM) skills among Oxfordshire's young people;
- increase the number of apprenticeship opportunities.

Technology Campus, Oxford

Reducing exclusion

- address exclusion from the labour market, by up-skilling and other measures to help young people and adults marginalised or disadvantaged from work.

Recruitment and retention

- emphasise the importance of people as well as firms in terms of inward investment – Oxford has plenty of firms that will grow fast if they can recruit and retain the right people, including through international recruitment. Government controls on immigration must not hamper the ability of Oxfordshire firms to grow.

Actions to deliver our Programme

The Oxfordshire Skills Board was established in 2011. It works closely with the LEP in order to achieve improvements in the skills infrastructure available to Oxfordshire's employers and the learning opportunities available to students, residents and workforce. The Oxfordshire Skills Strategy to 2020 was developed by the Skills Board. It sets out the strategic priorities necessary to support economic growth to 2020. The specific actions to deliver our education and skills ambition are set out in the Oxfordshire Skills Strategy.

Through our European Social Fund programme, we have developed with the Big Lottery Fund, a £1.2m programme that will focus on helping those residents that are long term unemployed to move closer to the labour market. Activate Learning is running this activity, called Building Better Opportunities, from 1 August 2016 for three years[19]. The project will help 300 Oxfordshire residents to seek training and work opportunities.

With the Big Lottery Fund, we have issued a project call for an engagement programme to help those young people in Oxfordshire who are not in employment, education or training (NEET), and a transition programme to help young people at risk of becoming NEET – using match funding from the Big Lottery Fund to make a project total of over £1m. The project will help 445 young people who are NEET, or at risk of becoming NEET over a three-year period. At the time of writing, the bids are being assessed and we are confident the project will start in 2017.

Oxford City Council was successful in gaining the contract to run the Oxfordshire Community Grants scheme with a value of just under £0.4m that will be focused on helping around 250 people within their communities to move closer to the labour market.

In addition, Oxford City Council was successful in gaining the contract to run the Oxfordshire Community Grants scheme with a value of just under £0.4m that will be focused on helping around 250 people within their communities to move closer to the labour market. This project was launched in October 2016. Grants are available throughout the county and community groups and other eligible organisations can bid for funds of between £5,000 and £50,000.

Furthermore, DWP issued a project specification on our behalf in October 2016 seeking partners to deliver a £2.4m programme of projects to help unemployed and economically inactive people in Oxfordshire into training and work. The programme is centered on helping people into work at the new Westgate Shopping Centre when it opens in October 2017, and into the logistics and social care sectors, in line with the Oxfordshire Skills Strategy. The programme will be delivered from 2017 to 2020.

19 http://www.cityofoxford.ac.uk/news/project-support-long-term-unemployed-back-work

We will continue to deliver the Oxfordshire Apprenticeships programme which aims to increase the number of apprentices in Oxfordshire through wide-ranging engagement with Oxfordshire schools, running advertising campaigns and workshops, and by increasing the number of Apprenticeship Ambassadors.

Taken together, these projects to help our longer term unemployed residents represent an opportunity for Oxfordshire to tackle social exclusion and enable local people to access some of the local jobs being generated through business start-up and growth, and through employment-generating new development.

Community Employment Plans (CEPs) will also support people to access job opportunities arising from new development. They include employer-led initiatives relating to both the construction phase for all large developments, and the end user phase of large commercial development, and include measures such as apprenticeships and training schemes, local procurement and links with schools and colleges. A number of CEPs are already in place across Oxfordshire (see case study below for an example), and more are in the pipeline. We will support local authorities to include such proposals as part of their local plan policies and supporting text.

We will continue to deliver the Oxfordshire Apprenticeships programme which aims to increase the number of apprentices in Oxfordshire through wide-ranging engagement with Oxfordshire schools, running advertising campaigns and workshops, and by increasing the number of Apprenticeship Ambassadors. The programme has already benefitted from £1.5m of City Deal funding, focusing particularly on sectors that support Oxfordshire's growth including advanced engineering and manufacturing, space and satellite, creative and digital, and life sciences.

Case Study

DIDCOT GIRLS' SCHOOL – "A Business Breakfast with a Twist"

The aims of this project are to open up the school as a welcoming space to the local, Didcot business community; and to engage students with local employers, and to provide a platform for students to build presenting and leadership skills while exhibiting to employers.

Didcot Girls' School's Enterprise Adviser invited his networks and the local business community to a networking event hosted inside DGS. The whole student body was set the task of developing a business idea in groups – a project they worked on with their tutor groups in school for weeks prior to the event. The winning team received business mentoring for their project, hosted by Didcot Railway Centre.

On the day itself, the students hosted the event and pitched their business ideas. One student who pitched her wish to find work experience in the aerospace engineering industry was approached by a young, female engineer working for a space systems organisation and received career mentoring and gained valuable insights and inspiration.

We will support implementation of the recommendations of the Post-16 Review. This will see potential realignment within our Further Education infrastructure to better reflect the skills needs of our economy.

In the short term, we will seek clarity from the Government regarding the status of EU and other non-UK citizens working in the UK and the current and potential future barriers to attracting EU and other non-UK staff to the UK. Access to the best talent internationally is crucial to the success of the universities and big science facilities as well as to many of the firms in the county.

Oxford Brookes University, Headington Campus

© Oxford Brookes University / Paul Tait

Case Study

Westgate Community Employment Plan

In 2013 we successfully agreed with Land Securities the development of a Community Employment Plan for the Westgate shopping centre redevelopment. The key objectives of the Community Employment Plan are:

- To procure supply chain locally
- To provide Oxfordshire residents with sustainable jobs
- To equip people with the skills to be successful, with a particular focus on youth and longer term unemployed groups
- To give communities the opportunity to grow for good

Two plans have been agreed for the Westgate development, covering the construction stage and as the retail units, cinemas and restaurants are opened in the autumn of 2017. 750 Oxfordshire residents will be helped into training, apprenticeships and work

There have been a number of successes within the current construction CEP, in particular through the Sector Based Work Academies. These are a Job Centre Plus initiative, which are used to support the most marginalised from the workforce.

The construction phase CEP aims to support 60 residents aged 18 or over during the life of the development.

The Job Centre Plus recruited the candidates and provided the necessary support before they started the programme. The City of Oxford College then provided the training, which in this instance enabled the candidates to obtain a Construction Skills Certification Scheme (CSCS) card. Once the candidates completed the training and passed the CSCS exam, they were supported with a week's work experience with Laing O'Rourke on the Westgate site.

The work experience roles offered have been:

- Security person
- Gate/stores person
- Assistant engineer
- Site operative
- Concrete technician

A total of 52 local unemployed people have so far been trained in construction health and safety and supported to obtain their CSCS card. 17 of the SBWA trainees came to the Westgate for a week of work experience, at the end of which there is a guaranteed job interview. 7 of these have now been employed by Laing O'Rourke.

Two, Tom Alcock and James Walsh, have been so impressive that they were nominated for the Land Securities 2016 Community Employment Construction Programme Awards. These awards were established to reward those who have overcome significant barriers to employment and continued to make great progress in their career.

Tom Alcock was awarded highly commended at the 2016 awards.

Kingsmere, Bicester

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8. Place

Headline SWOT assessment - Place

Strengths and opportunities
• Oxfordshire is one of the most attractive places in the country to live and work • It has a high quality built environment – particularly in central Oxford and some of the market towns and villages • Within the county, there are extensive areas of high environmental quality and sensitivity as described by the SSSI, SAC and AONB series: Oxfordshire has a high level of natural capital found mainly in rural areas • Oxfordshire has internationally significant cultural and heritage assets, and an important tourism and cultural sector as a consequence
Weaknesses and threats
• There is a need to balance the opportunities for economic development with the possible compromise to the natural environment • Housing in Oxfordshire is among the most expensive and least affordable in the country • New housing delivery has improved significantly, and at a faster rate than nationally, but it remains well below the objectively assessed requirement as set out in the SHMA, meaning that it is unlikely to have any impact on housing becoming more affordable • Oxfordshire is facing significant resource constraints – water, power supply and grid capacity (e.g. to upload solar energy) – which are challenging the extent and quality of its natural assets • Although countywide emissions of carbon dioxide fell by just over 8% from 2008 to 2013 , if this trend continued, we would see emissions fall by 32% by 2030 (as compared to the public commitment to 50% reduction in the sustainable community strategy)

Current characteristics

Oxfordshire benefits from a high quality built and natural environment, which has evolved and changed over centuries. Significant parts of the built environment in Oxford, the market towns and villages are precious and should be conserved, but by no means all of the built environment is either attractive or fit for future purpose.

Oxfordshire's housing is among the most expensive in the country, making it difficult for young people in particular to afford to live locally.

Within the county, there are extensive areas of high environmental quality and sensitivity – the designated AONBs in particular – plus important cultural and heritage assets.

As set out already, Oxfordshire's housing is among the most expensive in the country, making it difficult for young people in particular to afford to live locally. According to the Land Registry house price index, the average cost of a house in Oxford is £427,140, well out-stripping the average income of £26,900 of Oxford employees (taken from Annual Survey of Hours and Earnings, 2016 provisional data). This is reinforced by similar findings from the London-based Centre for Cities think tank which has found Oxford's housing is now the least affordable in the country. The problem of affordability is not confined to Oxford: the house price the earnings ratio in South Oxfordshire only slightly lower than in Oxford at 13 times the annual median income, and house prices across the county are 51% above the national average and 13% above average for the South East region. According to the Land Registry, the average price of a home in Oxfordshire as a whole is £353,702, a 7.6% annual increase on the previous year, compared to £234,250 nationally and £312,609 in the South East region.

Garden Quarter, Bicester

The result is hard to fill vacancies in vital jobs in the public sector (teachers, nurses etc), our key sectors and in lower paid jobs, long distance commuting from lower cost areas, and therefore more congestion on key transport routes, resulting in less disposable income for the resident population.

Oxfordshire is facing significant resource constraints including in relation to water, power supply and grid capacity which need to be addressed to achieve sustainable economic growth.

Priorities to 2020

The overall priority for Oxfordshire's places is to plan simultaneously for both jobs and housing growth, putting in place the infrastructure required for both, whilst also protecting and where possible enhancing environmental quality and social inclusion.

The detailed priorities in relation to place can be summarised under four main headings: place-making, including housing delivery and affordability; supporting the implementation of the Strategic Environmental Economic Investment Plan (SEEIP); support for the development plan system; and dealing with infrastructure constraints.

Support for the Development Plan system and place-making

- communicate the priorities of the SEP to local planning authorities in their preparation of Local Plans and to communities who are preparing neighbourhood plans;
- work with Oxfordshire's local authorities (through the local plan preparation process and by responding to individual planning applications for strategic development sites), to ensure high quality housing is delivered in a sustainable manner, meeting the full range of demand and needs is delivered close to jobs and with supporting retail, community, social, transport and green infrastructure and recreational facilities and services. This includes support for master-planning which is being used for bringing forward a range of major allocated development sites across the county;

- support the delivery of new housing and employment space which has been allocated for development in adopted Local Plans, for example through securing funding for access or infrastructure improvements. This includes support for

New development can, and should, enhance the existing built environment, through excellent design and the use of high quality building materials, and provide appropriate green infrastructure

strategic allocations which will result from Oxford City's unmet housing need, which may also result in significant economic development opportunities;

- support innovative approaches to the supply of a sufficient quantity of genuinely affordable housing, for example through community land trusts, Neighbourhood Plans, self-build schemes and employer initiatives to provide housing for their key workers, recognising that we and our partners are significantly constrained unless there are radical changes in housing and planning policy at a national level;
- support the design and delivery of innovation districts in suitable locations across the county (comprising mixed use, high density developments providing space for innovative businesses of different sizes, an appropriate mix of housing for the local workforce, supporting facilities and services and a high quality built environment). Some of these will be within existing urban areas, such as Oxford's West End and Osney Mead. Others may form part of new developments: for example, the proposed West Oxfordshire Garden Village at Eynsham.

Support for environmental and social sustainability

Burford

- ensure the high quality of our built and rural environments is maintained, and managing change in ways which produce better outcomes for local residents and businesses, and the natural environment. New development can, and should, enhance the existing built environment, through excellent design and the use of high quality building materials, and provide appropriate green infrastructure. At the same time, the sustainability of the existing built environment must be improved;
- support economic regeneration and environmental enhancement in priority areas such as Carterton and Berinsfield, and also to strengthen the long term role of town centres;
- support implementation of climate change targets.

Dealing with infrastructure constraints

- support the production of development plans which fully consider the available and potential capacity of infrastructure in the broadest sense;
- ensure that all homes and businesses have access to resilient broadband with at least 24MG download capacity, and to a good mobile phone signal;
- provide continued support for the implementation of flood alleviation schemes.

In most cases under the Place programme, we will play an influencing and brokerage role through the Growth Board, persuading and supporting partners to take action, and helping to secure funding where appropriate.

Actions to deliver our Programme

In most cases under the Place programme, we will play an influencing and brokerage role through the Growth Board, persuading and supporting partners to take action, and helping to secure funding where appropriate. This includes support for the preparation and implementation of various strategies related to infrastructure and the environment, including:

- implementation of the Strategic Environmental and Economic Investment Plan (SEEIP), which will mean:

    1. Growing the green economy in Oxfordshire;
    2. Enhancing the quality and resilience of urban areas;
    3. Improving management of land to reduce flood risk, enhance water resources, and promote biodiversity;
    4. Promoting and enabling access to the countryside;
    5. Engaging people in the environment and enabling more sustainable lifestyles.

- implementation of the utilities study, commissioned by the Growth Board to map utilities capacity against Local Plan ambitions countywide;

- preparation of an Oxfordshire Infrastructure Strategy by the Oxfordshire Growth Board by spring 2017. This will identify, map and prioritise infrastructure requirements to 2040 under the themes of transport, education, health services, other strategic community and environmental infrastructure (e.g. waste management), energy and utilities, flooding and water management, broadband and connectivity, and green infrastructure;

- preparation of a locally-informed energy strategy for Oxfordshire to act as a business case for investment and grant support from Ofgem, etc.

We acknowledge the challenge faced by the local planning authorities in providing for the scale of housing and employment growth expected over the next 20 years, and will provide support wherever possible to ensure delivery of new homes and jobs.

Worcester College, Oxford

© University of Oxford

The Oxfordshire authorities are committed to allocating land for development through their Local Plans with housing delivery across the County up by 75% in the last two years. However, sustaining this level of increase will not be possible without greater investment in infrastructure and flexibilities to support delivery of the programme of infrastructure investment, unlock land and ensure that local authorities have the levers and capacity to bring forward sites for development.

These priorities are forming the basis for our ongoing devolution discussions. These will potentially bring forward a series of interventions which, alongside continued Local Growth Fund (LGF) investment, should support our place shaping priorities and increase housing delivery. These include:

- an integrated approach to strategic planning for infrastructure, housing and employment that builds on Local Plans and existing joint working through the proposed Combined Authority Growth Board;
- a partnership with the Homes and Communities Agency (HCA) to develop and support a housing investment strategy and consolidated funding allocation to address the county's housing priorities and enable delivery of the mix of housing needed to support economic growth, including a substantial proportion of starter homes;
- development of a Land and Property Partnership Board to support the use, deployment and regeneration of public land and other major landholdings;
- development of housing development companies with access to a revolving investment fund and supported by strengthened local authority Compulsory Purchase Order (CPO) powers to unlock housing delivery;
- locally-set planning fees to increase and align resources needed to support the significant growth in strategic site delivery.

Case Study

An example of high quality place-making and innovative approaches to local housing delivery: Graven Hill

In 2014 Cherwell District Council purchased the 187 ha Graven Hill site to the south of Bicester from the MoD. Rather than simply allocating the site for new housing development, the Council decided on a more innovative approach to meeting local housing need. It is now the first self- build project of its type in the UK, allowing people to build their own homes.

1,900 new self-build homes can be accommodated on the site and the first plots are already available for sale.

There is the potential to provide a wide variety of sizes of dwelling, including large individual plots for grand designers, or smaller plots for those on more modest budgets. There are also opportunities for groups of people to work collaboratively to build their homes, including building terraces of eco homes or low cost apartments.

The development will include a primary school and other community amenities, including shops and a pub. Around 1 million sq ft of commercial space will accompany the housing development, providing around 2,000 new jobs and apprenticeships.

http://gravenhill.co.uk/

Smart Oxford will provide new solutions in areas such as housing, health and transport to address issues of congestion, air pollution as well as promoting innovation, and generating jobs and growth

We are also committed to supporting attractive, sustainable and resilient places (including Garden Towns at Bicester and Didcot). Major actions agreed within the Strategic Environmental Economic Investment Plan include the development of a Sustainability and Environment Sub-Group to the LEP which will promote the value and inclusion of the environment and sustainable development across future strategies and plans and help to grow a successful and inclusive economy in Oxfordshire.

Partners in Oxfordshire are committed to the delivery of "Smart Oxford"[20]. Smart Oxford, involving private, public and voluntary sector partners, aims to build a stronger, safer, economically and environmentally sustainable city and surroundings taking advantage of the latest data-enabled solutions. Smart Oxford will provide new solutions in areas such as housing, health and transport to address issues of congestion, air pollution as well as promoting innovation, and generating jobs and growth. The LEP will promote increased access to data to facilitate this, for example, through data sharing agreements as part of the approval process for major commercial planning applications.

Bicester Market Square

© Oxfordshire County Council

We are focusing £1.6m of our European Structural and Investment Fund (ESIF) monies (principally European Regional Development Fund - ERDF) on low carbon agendas in order to help mitigate climate change. With match funding, this will equate to a £3.2m low carbon programme for Oxfordshire which will help 180 businesses reduce their carbon footprint. Delivery should commence early in 2017.

In relation to the resilience of Oxfordshire's places, we have secured £26.5m through Local Growth Fund to part fund the Oxfordshire Flood Risk Management Scheme (total investment £90.3m), which is a comprehensive package of measures to mitigate the risks of damage to homes, businesses and transport connections caused by excessive flooding. This project will be delivered by the Environment Agency and will be implemented in the period 2018-21.

We are focusing £1.6m of our European Structural and Investment Fund (ESIF) monies (principally European Regional Development Fund - ERDF) on low carbon agendas in order to help mitigate climate change

In addition, we have also secured £0.6m through the Local Growth Fund toward funding Upstream Flood Storage at Northway (total investment £1.9m). This is a comprehensive package of measures to mitigate the risks of damage to homes, businesses and transport connections caused by excessive flooding. This project will be delivered by Oxford City Council in the period 2016-17.

Our support for flood alleviation also includes promoting the application of new technologies that improve flood protection. For example, the Oxford Flood Network consists of water-level sensors placed in a range of locations and connected through innovative wireless technology to provide information and early warnings to citizens in flood-prone areas.

20 http://oxfordsmartcity.uk/cgi-bin/index.pl

Case Study

Carterton: opportunities for economic regeneration and environmental enhancement

Carterton is a relatively modern town, which during the last 100 years has grown from an area of small holdings to become the second largest town in West Oxfordshire. Part of the town's rapid growth has been associated with RAF Brize Norton, now the country's main RAF transport base, which employs around 7,300 workers, a substantial number of whom live on the base or in Carterton.

Transport is an important issue as Carterton is relatively remote from the primary road network. This together with the relatively limited supply of undeveloped business land, is limiting the potential of the town to attract additional inward investment, capitalising on the aviation linkages with RAF Brize Norton, and on the technical skills of the local labour force, many of whom are ex RAF service personnel.

Although many RAF service personnel live on the base, there are several areas of low density and poorly designed MOD housing within the town. Redevelopment of this housing has been highlighted as a priority through the West Oxfordshire Local Plan and will enhance the environment of the town and to build footfall for the town centre.

A package of regeneration measures, such as enhanced road access, has the potential to unlock this unique economic development opportunity.

Oxfordshire countryside

Airbus Headquarters, West Oxfordshire

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9. Enterprise

Headline SWOT assessment - Enterprise

Strengths and opportunities
• Outstanding strengths and opportunities in research and its commercialisation • Large and diverse high tech economy, including many firms with exceptional growth potential • Globally significant sector strengths in automotive & motorsport, creative & digital, electronics & sensors, life sciences and space technologies • Wide range of social enterprises dealing with an equally broad spread of social issues • Excellent access to patient risk capital for innovative businesses and spin outs from the research base • Good provision of business incubation facilities, particularly within the Knowledge Spine.
Weaknesses and threats
• Relatively low levels of new starts, and a small proportion of high growth businesses • High growth businesses are concentrated mainly in Oxford and southern Oxfordshire, where constraints on growth (linked, for example, to traffic congestion) are most acute • Declining working age population means labour shortages are likely to get worse • Concerns about congestion, housing costs and access to skills threaten firms' ability and willingness to grow in Oxfordshire • Oxfordshire's firms are very international – in relation to their markets, workforce and networks. They are therefore vulnerable to global economic shocks or significant policy changes, such as in relation to international migration

Current characteristics

Oxfordshire is remarkable for the range of business sectors and scientific disciplines in which there is real strength and depth.

The county has some outstanding success stories in business formation and growth – particularly in science and technology-based sectors. It has globally significant strengths in five areas, all of which have huge growth potential - automotive & motorsport, creative & digital, electronics & sensors, life sciences and space technologies (see below); and these have been a particular focus for inward investment. Oxfordshire also has an internationally renowned grouping of universities and research institutions which are increasingly focused on local commercialisation of their R&D, and on building links with Oxfordshire businesses.

Oxford Science Park

Figure 6: Inward investment enquiries by sector, 2015/16

Automotive and Advanced Engineering	21
Life Sciences	43
Space and Space-related Technologies	12
Creative (IT Publishing and Media)	34
Energy and Environment	7
Professional and Business Services	10
Retail	2
Food and Drink	6
Tourism and Leisure	6
Other	28

(Source: Invest in Oxfordshire)

Invest in Oxfordshire has developed a series of Sector Profiles that explore the strengths, capabilities, opportunities and prospects of the key sectors in the county. These are summarised below in Figure 7. The sector profiles are primarily a promotional and marketing tool that provides prospective national and international investors with accurate and detailed information.

Figure 7: Oxfordshire's key sector profiles

Automotive and motorsport	Creative and digital	Electronics - sensors and instruments	Life sciences	Space technologies
• 24,000 people employed in manufacturing across the county; 3,700 of these directly in motor vehicles • Part of a wider cluster which extends across Oxfordshire, Northamptonshire, Buckinghamshire and Milton Keynes • R&D expertise: Oxford University, Oxford Brookes University, F1 companies, Mobile Robotics Group (autonomous vehicles) • Some global brands including BMW Mini and three F1 teams (Williams, Renault and Manor Marussia) • Expertise in technologies for autonomous, electric and hybrid vehicles, batteries and energy storage, and lightweight materials	• One of the UK top 10 creativity and innovation hotspots (NESTA) • Sector strengths in: publishing, computer games, software development, cybersecurity, big data, • TV and film, broadcast and production and sound • Over 22,000 people employed in digital employment across the county • The largest centre of publishing in the UK outside London • Part of the SuperConnected Cities programme, rolling out superfast broadband to everyone throughout Oxford	• Well-established electronics industry: over twice the national proportion of optoelectronics employees • Track record of attracting global electronics companies: Toshiba, CN Innovations, Sharp's European research centre, all based locally • World -class R&D facilities, e.g. at Harwell Campus and at Culham • Diverse commercial base: R&D, design and manufacturing	• University of Oxford is ranked first in the world for both life sciences and clinical, pre-clinical and health (Times HE World University Rankings 2015-16) • Investment magnet: Oxfordshire life science companies have raised over $1.5bn in investment since 2014 • Fast-growing university spin-outs • Clinical trials: University of Oxford Medical Sciences Division and the Oxford University Hospitals NHS Foundation Trust run one of the biggest clinical trial portfolios in the UK	• Al ready attracted leading international space technology companies such as Lockheed Martin, Thales Alenia Space and Elecnor Deimos • Internationally state -of-the-art robotics and autonomous systems • Space Studio Banbury is a unique new school for pupils with an interest in maths, technology and space, and works closely with the space industry to develop and deliver the curriculum • BIS estimates the space industry could generate 100,000 new jobs in t he UK by 2031: and the UK Space Gateway at Harwell Campus puts Oxfordshire at the centre of the UK and European space industry: ESA, ECSAT, RAL Space, the Satellite Applications Catapult

There has been strong employment growth in Oxfordshire in the last few years, but sustaining that growth over the long-term is a significant challenge, particularly given

Oxfordshire is the UK's first official 'Social Enterprise County'. The award recognised the wide range of social enterprises dealing with an equally broad spread of social issues. The county also has many strong enterprises in its rural areas and market towns, as well as within the main Knowledge Spine.

the uncertainties caused by the EU referendum result. The SEP has an important role in supporting the building of resilient local economies.

Amongst a proportion of high growth businesses, there is a need for stronger management and marketing capabilities to complement technical excellence (i.e. building management teams to enable growth). The establishment of several specialist funds has improved access to finance for businesses with high growth potential, and the provision of business incubator facilities in the county is relatively good. However, many new and small firms still experience problems of access to finance and to flexible property, particularly those which are not linked to research based institutions.

Oxfordshire is the UK's first official 'Social Enterprise County'. The award recognised the wide range of social enterprises dealing with an equally broad spread of social issues. The county also has many strong enterprises in its rural areas and market towns, as well as within the main Knowledge Spine.

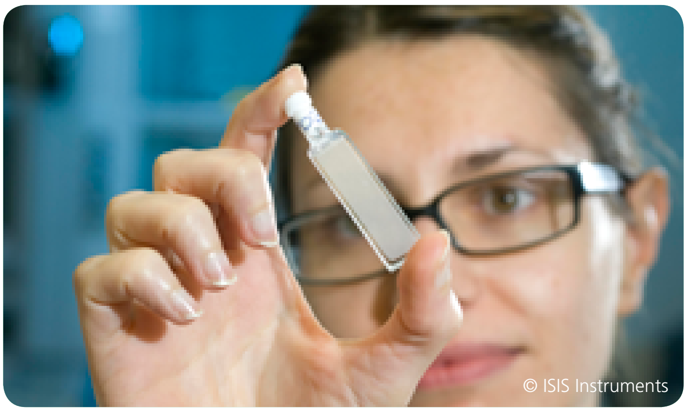
Priorities to 2020

The SEP identifies priorities for enterprise relating to all employment sectors, and more specifically to the five globally significant, wealth creating sectors, and the large employment sectors which provide the majority of jobs for Oxfordshire's people.

Support for all businesses and all parts of the county

- improve productivity across all sectors, to 'create more from less': for example, by encouraging businesses to adopt energy efficiency approaches, to use resources more efficiently throughout their supply chains, and by supporting training;
- encourage businesses to fully understand and mitigate their impact on the natural environment, exploiting opportunities available within the knowledge economy and new approaches such as the circular economy and natural capital accounting.
- link firms to networks and support, both within and across sectors, for example by strengthening the Network Navigators initiative and by helping firms navigate the research community in Oxfordshire;
- focus on export promotion among businesses with the potential to operate in international markets, and working in collaboration with the Department of International Trade to ensure its full support for exporting by Oxfordshire firms;

ISIS Instruments Scientist



Oxford Science Park

- improve national and international marketing of Oxfordshire and its firms, and consistent messaging about quality growth – to benefit local businesses and attract public and private sector investment into the county;
- support start up and scale up of businesses in Oxfordshire through, for example, improved provision of incubator and grow-on facilities, business advice and access to finance, and an enhanced on-line presence for small firms. It is important that Oxfordshire both supports more start-ups and also retains and supports established firms, particularly those with high growth potential;
- celebrate Oxfordshire's business successes across all sectors, to raise the profile of Oxfordshire's businesses both internally (within the county) and externally, and to establish role models for the next generation of entrepreneurs;
- encourage all employers to provide flexible jobs that can work for those on the margins of the labour market.

Support for globally significant, wealth creating sectors

- support the local commercialisation and application of technologies developed by Oxfordshire's research and business communities in areas which improve environmental sustainability and health outcomes, such as low carbon, low energy systems, autonomous vehicles and digital health, in order to benefit Oxfordshire's people, places and connectivity and to complement activities under each of the four programmes.

Support for large employment sectors

- support interrelationships between the tourism economies of Oxfordshire and surrounding areas, such as the Cotswolds;
- support other important employment sectors which include retail, logistics and distribution, health and social care, and education (e.g. through access to finance and business support, access to training, and in making provision through the planning system for an appropriate range of premises in the right locations).

Actions to deliver our Programme

In relation to Enterprise, we will be directly involved in delivering a range of business support, as well as working with partners to ensure priorities are addressed in all areas of the economy and of the county.

We will implement the SEEIP and the ERDF Low Carbon programme to help businesses mitigate their impact on the environment, and support the continuation and where possible strengthen local funds which support commercialisation including for example Oxford Sciences Innovation and the Oxford Investment Opportunities Network.

We intend to continue to advance the delivery of business support through Oxfordshire Business Support (OBS).

We will prioritise the activities of Invest in Oxfordshire to promote inward investment into Oxfordshire by continuing to market the county (nationally and internationally) as an attractive place in which to locate a business. Invest in Oxfordshire will also build further on our already strong links with Department for International Trade to support increased exporting by Oxfordshire firms.

We intend to continue to advance the delivery of business support through Oxfordshire Business Support (OBS). It includes the Network Navigators programme, which is a support and signposting service focused specifically on the globally significant sectors and also, most recently, on tourism. We will also establish a business ambassador's service to celebrate and communicate Oxfordshire's business excellence and distinctive successes.

Oxford Wood Recycling, Abingdon

© Oxford Wood Recycling

Our €9.9m European Regional Development Fund has been allocated to deliver against the ambitions of our Enterprise Programme. These include priorities linked to 'SME Competitiveness' (€3.9m), which will help 469 Oxfordshire businesses to start up and grow, and 'Research and Innovation' (€3.7m) which will help 285 businesses grow and innovate through collaborative work with research institutions and with each other.

We will continue to sponsor Venturefest (£10,000 a year), the West Oxfordshire Business Awards (£1,950), the Cherwell Business Awards (£1,000), the Oxfordshire Business Awards (£6,000), and business networks such as B4.

Specific measures to support commercialisation and scale up include RACE at Culham, the Bioescalator and the Centre for Applied Superconductivity (the last a public/private partnership).

We will implement the Oxfordshire Skills Strategy and work through our sub groups to build relationships with businesses to influence their approaches to job specification and recruitment.

We will also help to shape and respond to the Government's proposed industrial strategy: this is a significant opportunity for Oxfordshire, as it is likely that most of all of the globally significant sectors in Oxfordshire will be priorities for the Government.

- In relation to the tourism and visitor economy, we will deliver the Creative, Cultural Heritage and Tourism (CCHT) Investment Plan, which identified four main thematic areas:
  - productive and engaging experiences;
  - skills, talent development and business growth;
  - creative place-making; and
  - collaboration.

Business site assembly and deliverability is a concern in parts of Oxfordshire due to viability issues, and pressures to convert business premises into homes is creating a shortage of business premises, especially small scale business premises. We will help overcome constraints to the development of land allocated for employment uses where there are shortages of market led supply by contributing to emerging Local Plan consultations and by responding to individual planning applications and master-plans for strategic development sites.

We will also help to shape and respond to the Government's proposed industrial strategy: this is a significant opportunity for Oxfordshire, as it is likely that most of all of the globally significant sectors in Oxfordshire will be priorities for the Government.

Case Study

Prodrive

Prodrive, one of the world's largest and most successful motorsport and technology businesses, is headquartered in Banbury. The company's advanced technology division, which originated from its motorsports engineering expertise, now also serves the road automotive market in addition to defence, aerospace and marine industries. From the company's laboratory in Banbury, Prodrive is developing the next generation of power electronics for electric and electric hybrid vehicles, including an efficient high voltage multiport DC-DC converter.

Working together with the Cherwell District Council, Invest in Oxfordshire assisted Prodrive to expand and relocate to new larger premises in Banbury in April 2015. Their new, modern, purpose built facility is prominently located on the M40 and has 110 000 sq. ft. of manufacturing space. This expansion has safeguarded 290 local jobs and we have also assisted the company to make an LGF funding application for further local expansion. We have also recently arranged for a UKTI delegation of 22 foreign business visitors (potential investors) to visit Prodrive in July 2016 as part of a visit to Oxfordshire ahead of their participation in the MIA Driving Future Motorsport Business Growth Conference at Silverstone before the F1 Grand Prix.

Prodrive, Banbury

Case Study

BE INSPIRED IN SCIENCE VALE OXFORD: The UK's home for scientists, entrepreneurs, and innovators in the heart of the countryside

'Everything thrives in the right environment – your business, your professional networks, your social life. When you bring people, ideas, and technology together, connections and collaborations spark … opportunities multiply … the unexpected happens'.

That thirst for the new is what makes Science Vale tick. Scientists, innovators, and entrepreneurs come here to share in our world-leading concentration of research facilities and development activities. This lively and imaginative community has transformed Science Vale into one of Europe's most successful and competitive science hot-spots.

Since being awarded enterprise zone status in 2012 for Science Vale Oxford and Didcot Growth Accelerator this year, over 70 companies have benefited from the move to Science Vale, creating more than 1,200 jobs in the process.

Big name employers include Element Six (a De Beers group company) – in 2013 they relocated their group's global research and development centre for the design, development and production of synthetic diamonds at the Harwell enterprise zone. Employee numbers have grown to over 100 since then.

Since moving to the Milton Park enterprise zone in 2013 Tokamak Energy Ltd has expanded rapidly. The company, which began life at Culham Science Centre recently took over larger laboratory and engineering space in the enterprise zone providing more space for their growing operations. This research and developer of tokamaks for plasma physics and fusion research, now employ more than 11 people and are looking to double this in the3 next few years. A great example of the innovation and collaboration found within the heart of Science Vale.

With 20,000 new jobs and 15,000 new homes planned for Science Vale over the next 15 years, the business opportunities are big – just like the science.

www.sciencevale.com

Enterprise Zones


Next stop,
London
Marylebone.
Arriving
Summer
2015
Chiltern Railways

10

10. Connectivity

Headline SWOT assessment - Connectivity

Strengths and opportunities
• There has been significant improvement in rail, with the first new connection to London in 100 years and station in Oxfordshire for 80 years, but with more investment needed to enhance capacity and reliability • Bus travel is amongst the country's most modern and innovative (e.g. in terms of payment) • Recent road investment has addressed some important pinch-points • Oxford Transport Strategy Rapid Transit and Park & Ride network will support growth and economic development in Oxford and along the Knowledge Spine • Active & Healthy Travel is a growing area of importance. While it requires investment, there is a commitment to prioritise this area to meet transport and health objectives and address limited past progress • There is an opportunity to apply some outstanding research undertaken in Oxfordshire's research institutions to solve or reduce local connectivity problems • Oxfordshire has a very large number of business networks, some of which have a regional or national profile (e.g. OBN)
Weaknesses and threats
• Congestion on Oxfordshire's roads remains a significant issue, despite targeted investment in the strategic network • Oxford City suffers from serious traffic congestion, which is forecast to get worse. This affects the speed and reliability of bus travel, undermining its image and ability to attract more users • Broadband has seen some significant upgrades but there are still areas in rural areas that do not have superfast broadband, and access to resilient broadband is a frequent concern for businesses • Similarly, mobile phone coverage remains patchy across the county • Oxfordshire's business networks are mainly sector specific and opportunities for cross over benefits between sectors, technologies and businesses may be missed • The capacity of the electricity grid in Oxfordshire is constrained – particularly for renewables connections, but also for supply connections

Current characteristics

Oxfordshire is a very well connected county. Strategically, it has excellent links to London, Heathrow, the Midlands and the south coast ports. The rail network has been improved by the new Oxford Parkway station and the direct link to Marylebone, and there are further significant improvements in the pipeline (e.g. electrification of the Great Western Mainline). Business use of London Oxford Airport has increased.

However, roads within Oxfordshire and the major routes beyond the county such as the M40, A34 and A40, all suffer from congestion. Oxfordshire County Council's Congestion Report (2014/15) shows a steady increase in average journey times across Oxford and an increase in congestion across the county. This is partly the result of high housing costs in the county forcing people to commute long distances to work.

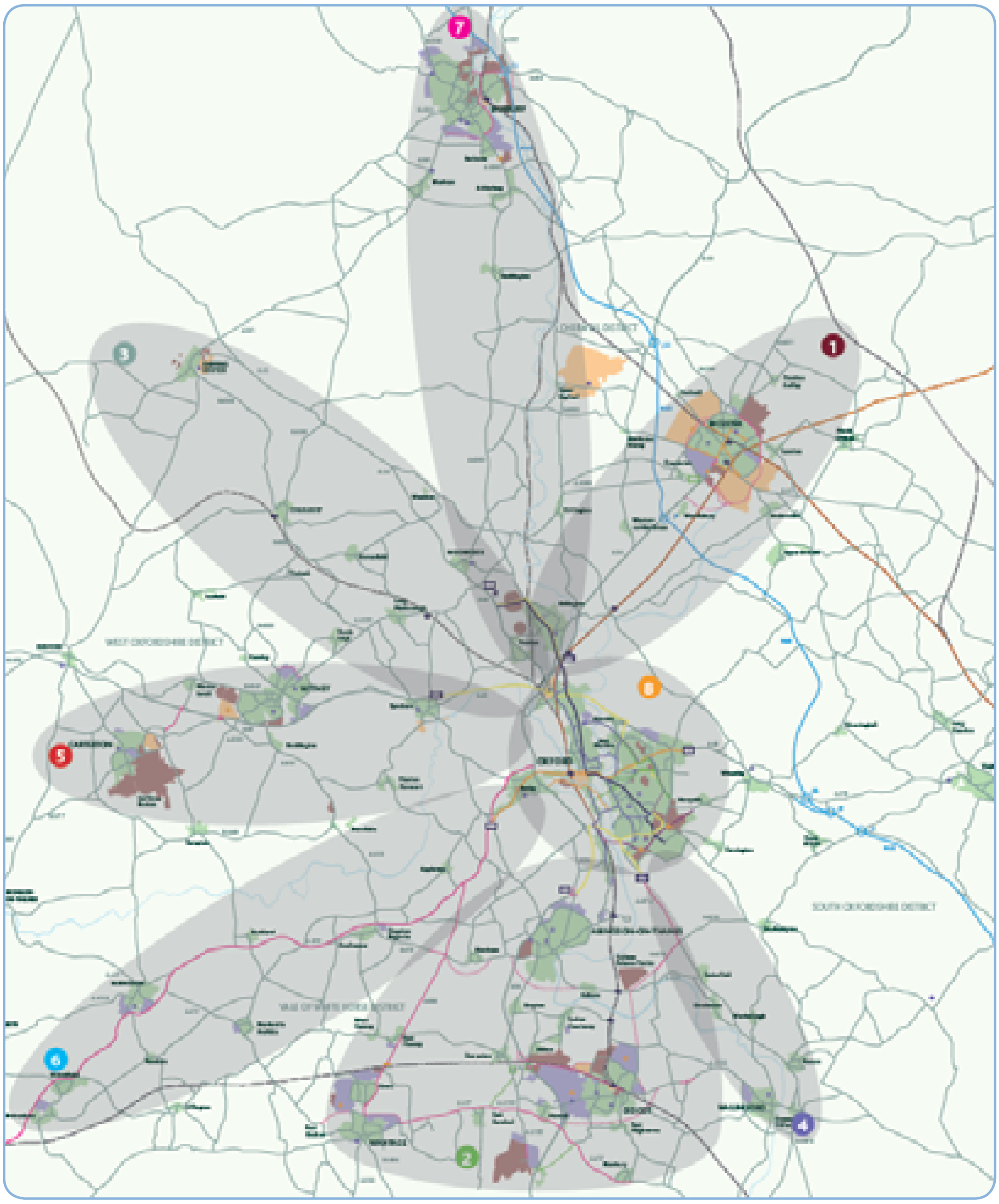
Digital connectivity within Oxfordshire is generally good, although there are still some gaps. Access to broadband across the county has improved through the Better Broadband for Oxfordshire project but further improvements are needed both to broadband and to mobile phone networks to ensure all homes and businesses can benefit from high capacity telecommunications.

The business community is well networked, including some strong sector focused networks such as OBN (for the life sciences), long established business angel networks, and a growing network for entrepreneurs. However, the existing networks are quite fragmented and are mainly sector focused.

Oxfordshire is also developing some outstanding technologies which could improve connectivity both locally and more generally. For example, Oxbotica, which originated from Oxford University's Mobile Robotics Group, was identified by the Wall Street Journal as one of the 'Top 10 Tech Companies to watch in 2015' and claimed it *"may be one of the few companies in the world to rival Google in driverless cars"*.

Kennington Roundabout

Figure 8: Oxfordshire's growth corridors



Priorities to 2020

In delivering the SEP, we will assign particular priority to the following:

Improvements to physical connectivity in Oxfordshire

- overcome current capacity bottlenecks on road and rail networks within the county, both by network improvements and by getting better use out of existing road capacity through use of innovation technology and by encouraging change to more sustainable travel modes;

- develop a programme for strategic infrastructure improvements linking and supporting the planned growth of housing and employment;
- support the use of technology and other measures to reduce congestion, improve connectivity and reduce pollution;

Oxpens Redevelopment Site, Oxford

- support schemes which improve active and healthy forms of travel.

Improvements to virtual connectivity with Oxfordshire

- complete countywide broadband and mobile network coverage, to ensure all workplaces and homes have good internet and telecoms connectivity; and, subsequently, ensure there is continual improvement to give sufficient broadband speed and network capacity for modern businesses;
- strengthen network coordination across sectors, for example through the Network Navigators initiative.

Improvements to connectivity in a regional context

- work with partners in 'England's Economic Heartland'[21] to develop strategies to improve the capacity of transport corridors across Oxfordshire and into surrounding areas, including towards Cambridge and to London and Heathrow.

Actions to deliver our Programme

Together with our partners, we are committed to the delivery of the Connectivity Programme, including transport improvements to address constraints to growth and improve the quality of life.

Together with our partners, we are committed to the delivery of the Connectivity Programme, including transport improvements to address constraints to growth and improve the quality of life. Specific strategies which we will work with partners to implement include:

- The Oxfordshire Local Transport Plan 2015-31, which both addresses existing congestion where it is damaging the economy or hindering economic growth, and identifies ways to avoid exacerbating transport problems due housing and economic growth. The Plan includes strategies for all transport modes and area and route strategies. Capital funding for transport schemes is largely dependent on Local Growth Fund, which is secured through the LEP, but delivery is primarily the responsibility of the local authorities and transport companies. The LTP will also draw on other funding sources where possible such as the Local Sustainable Transport Fund (LSTF);

21 http://www.englandseconomicheartland.com/Pages/home.aspx

- The Science Transit Strategy – this is a long-term ambition to transform public transport along the Knowledge Spine. The Oxford Science Transit will be a fully integrated public transport system that connects the area's centres of innovation and economic growth with the two universities. It will mean that people using Oxford Science Transit will be able to hop on and off high-frequency bus and rail services using "smart" payment, planning their journeys using real-time information and updates. The City Deal will enable the first phase of the Science Transit by focusing on the major pinch points in the network: the A34 between Abingdon and south Oxford and the access into Oxford from the A34 along the Oxford Southern Bypass. This project will be delivered by Oxfordshire County Council. Its total cost will be £23.5m, of which £8.7m will be funded through the Oxfordshire City Deal. The Science Transit Shuttle is currently in its pilot phase;

- The Smart Oxford Strategy, which aims to exploit the opportunities arising from data-sharing and smart city technologies to make city services more efficient, make homes and businesses more sustainable in terms of resource consumption, improve resilience to emergencies such as flooding, improve safety, and lead to better health outcomes;

- The Oxfordshire Strategic Infrastructure Strategy, commissioned by the Growth Board in May 2016 (and due to be completed by spring 2017) to bring together infrastructure priorities into a single overarching Oxfordshire Infrastructure Strategy, which will incorporate green infrastructure;

- The Oxfordshire Active & Healthy Travel Strategy.

The implementation of these plans and strategies will involve substantial resources and some difficult decisions. For example, measures requiring implementation include a workplace parking levy, zero emission zones and more car restraint in Oxford, and the Science Transit Strategy requires significant improvements to the frequency and journey times to public transport between key locations within the Knowledge Spine. We will support the County Council and Oxford City Council in the sensitive implementation of contentious proposals, for example through its business networks, and in bidding to central government for resources. It will press partners to ensure that all new developments of housing and for employment use are well connected by bus as well as car, and have links to rail services.

Oxford Airport tram link concept

Specific examples of projects already underway and funded through City Deal and Local Growth Fund are provided in the section on "Progress in delivering our Strategic Economic Plan" and are demonstrated in figure 9 below. An example of a project to be implemented from 2017 onwards is the Science Vale Cycle Network improvements (total investment £4.9m, including £4.5m from Local Growth Fund). This is providing greater connectivity between Science Vale and the newly improved Didcot station by bike, and will be delivered by Oxfordshire County Council.

We will also continue to work with regional partners to develop initiatives to improve strategic transport links extending beyond Oxfordshire but which are very important to the efficient functioning of the Oxfordshire economy.

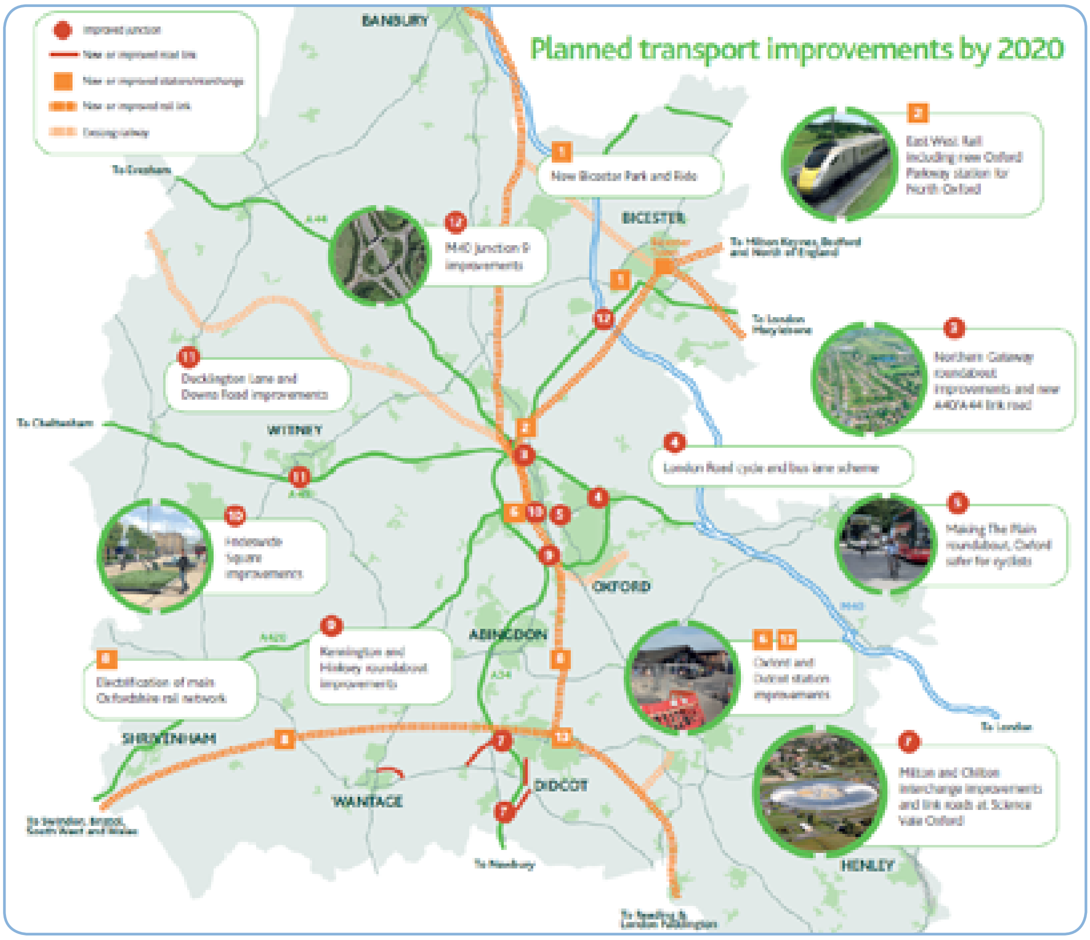
We endorse Cherwell District Council's support in its Local Plan (Part 1) for the growth of air related business activities at London Oxford Airport.

We will continue to support the Better Broadband for Oxfordshire initiative to make sure that as many premises as possible have access to high speed broadband provision.

In relation to business networks, we will continue to deliver directly the Network Navigators initiative, which provides business support and signposting specialists for each of the five globally significant sectors (described earlier) plus (most recently) tourism. We will also play a lead role in supporting a cross-sectoral business group to raise the profile of Oxfordshire and to attract public and private sector investment into the county.

We will also continue to work with regional partners to develop initiatives to improve strategic transport links extending beyond Oxfordshire but which are very important to the efficient functioning of the Oxfordshire economy. These include inputs to the recently published National Infrastructure Commission's review of links between Oxford, Milton Keynes and Cambridge[22], working with the Highways Agency on its national route based strategies, working with rail companies on planning for increased capacity and improved journey times and reliability, and supporting Thames Valley Berkshire Local Enterprise Partnership in relation to a Third Thames Crossing.

Figure 9: Transport improvements to 2020



22 https://www.gov.uk/government/publications/the-national-infrastructure-commissions-interim-report-into-the-cambridge-milton-keynes-oxford-corridor

Electric Vehicle Charging

© Shutterstock

Cambridge - Milton Keyes – Oxford corridor

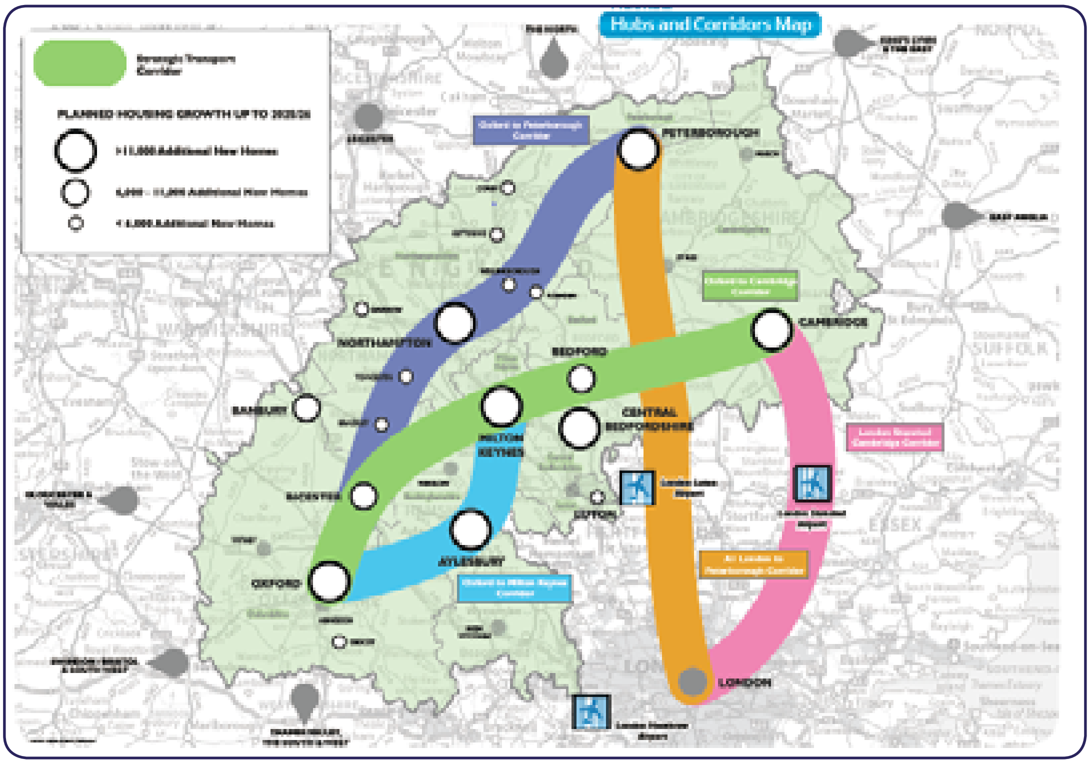
"To succeed in the global economy, the UK must build on its strengths. The corridor connecting Cambridge, Milton Keynes and Oxford could be Britain's Silicon Valley – a globally recognised centre for science, technology and innovation. But its future success is not guaranteed.

Transport links across the corridor are often slow, unreliable and congested, and the area is home to two of the least affordable cities in the UK, in part because it has consistently failed to build the homes it needs. These twin problems are already increasing costs for businesses and diminishing their ability to attract employees at all levels – including the recruitment and retention of globally mobile talent.

This area can become greater than the sum of its parts with better strategic planning which radically improves its transport connectivity whilst securing the tens of thousands of new homes it so desperately needs. East West Rail and the Oxford-Cambridge Expressway, can be a catalyst to bring the region together to deliver the housing and connectivity it will need to compete with the best in the world".

Cambridge Milton Keynes Oxford Interim Report, National Infrastructure Commission, Nov 2016

Figure 11: Map showing key growth hubs and transport corridors in England's Economic Heartland Area



Case Study

The iMass Programme

An example of partners' actions to deliver the Connectivity Programme is the experimental iMaaS programme, a two-year project to provide real-time, predictive and personalised information across all local transport networks in Oxfordshire. The project involves collaboration between Oxfordshire County Council, Chiltern Railways, Oxford Bus Company, Great Western Railway, Milton Park, Harwell and Culham Science Centre, the Met Office and Transport Focus. It records and maps every transport input – every user journey, every disruption – in order to develop of a suite of tools for different users (travellers, transport operators, major employers and employment areas, etc), such as a fully personalised, automated travel advisor, transport on demand smart ticketing, dynamic routing and optimisation of congestion and traffic flows in real time.

Case Study

Rural Broadband

Farmer Anne Gow battled for years with slow internet signal at her farm. Farmer Gow's is a small farm park in the heart of the Oxfordshire countryside that invites people to enjoy a farming and countryside 'day out'. The farm specialises in 'hands on' farm animal handling and feeding with chickens, geese, ducks, turkeys, pigs, sheep, cattle and goats. There are tractor rides, a tea room and an outdoor play area.

Fibre broadband has proved a major boost for the farm's operations since it was installed in January 2016.

Owner, Anne Gow, said: "the difference between the old and new broadband service is huge. We used to get download speeds of around 2Mbps and now we see speeds of above 20 Mbps! This has given me savings in lots of unexpected ways – in time, in cost and in sheer frustration!!"

"The impact of this improved speed on my farm has been quite amazing. We improved our website and added an online shop to it. This has had an unexpected benefit in that sales of one of the products we sell through the website, firewood, have increased by over 100% in the past 12 months. I would not have been able to do this work on the old broadband connection as the speed was simply too slow to allow me do these sorts of improvements. I can stay on top of the orders that come into through the website as I am not wasting time on a slow connection any longer."

"But it's not just about online sales. It's also an important part of attracting people to the farm.

"The internet has become an essential part of my business and my plans for expansion. The addition of fibre broadband has coincided perfectly with these expansion plans. I recently added two office rental units to the site. Fibre broadband has made these units far more attractive for companies considering locating their business here. I am very excited about the additional traffic that these two units are going to bring to the farm both in terms of businesses locating here and the visitors they will also bring".

Great Western Park

11

11. Moving forward in delivery

Managing risks, monitoring progress and reviewing priorities and actions

We are committed to an on-going process of monitoring and review. We will monitor progress in relation to our Programmes and the projects we, and partners, are delivering. We will also monitor changes in the economic and policy context for the SEP, and the extent to which our programmes are delivering sustainable and inclusive economic growth. To this end, we will be publishing in 2017 a SEP Monitoring and Impact Framework which will track our SEP priorities and actions, and the specific projects that will deliver them. The Framework will also identify the organisation responsible for delivering the project, and the role of OxLEP:

- **Leadership** – influencing decision-making processes (at central government as well as local levels) by representing the "voice of business" from Oxfordshire. For example, we will be leading on Oxfordshire's input and response to the emerging national Industrial Strategy;
- **Delivery** – where there is no natural partner we will take on responsibility for directly delivering key activity. For example, we directly deliver the Oxfordshire Business Support service and Oxfordshire Apprenticeships;
- **Brokerage** – linking partners and projects with each other and helping access funds through National Government (such as City Deal and Growth Deal Funding) to deliver the objectives of the Strategic Economic Plan. For example, we worked with a range of partners for the Local Growth Fund 3 submission;
- **Facilitation** - working in partnership with partners and wider stakeholders, including the Local Authorities, private and third sector organisations, Universities and Colleges. This is how we will work with others to implement our related Investment Plans and Strategies, and to support local arrangements for the delivery of new housing.

The SEP will be reviewed regularly to reflect changing circumstances and progress made. For example, if significant changes are made in Local Plans to the housing or job targets for Oxfordshire (upwards or downwards), or to Government funding for local economic development, we will respond by updating the SEP.

There are various risks to delivery of the SEP which will need to be monitored and managed. A summary of some of these risks, and our proposed approach to manage them, is included overleaf.

Great Western Park, Didcot

© South Oxfordshire DC

Risk register

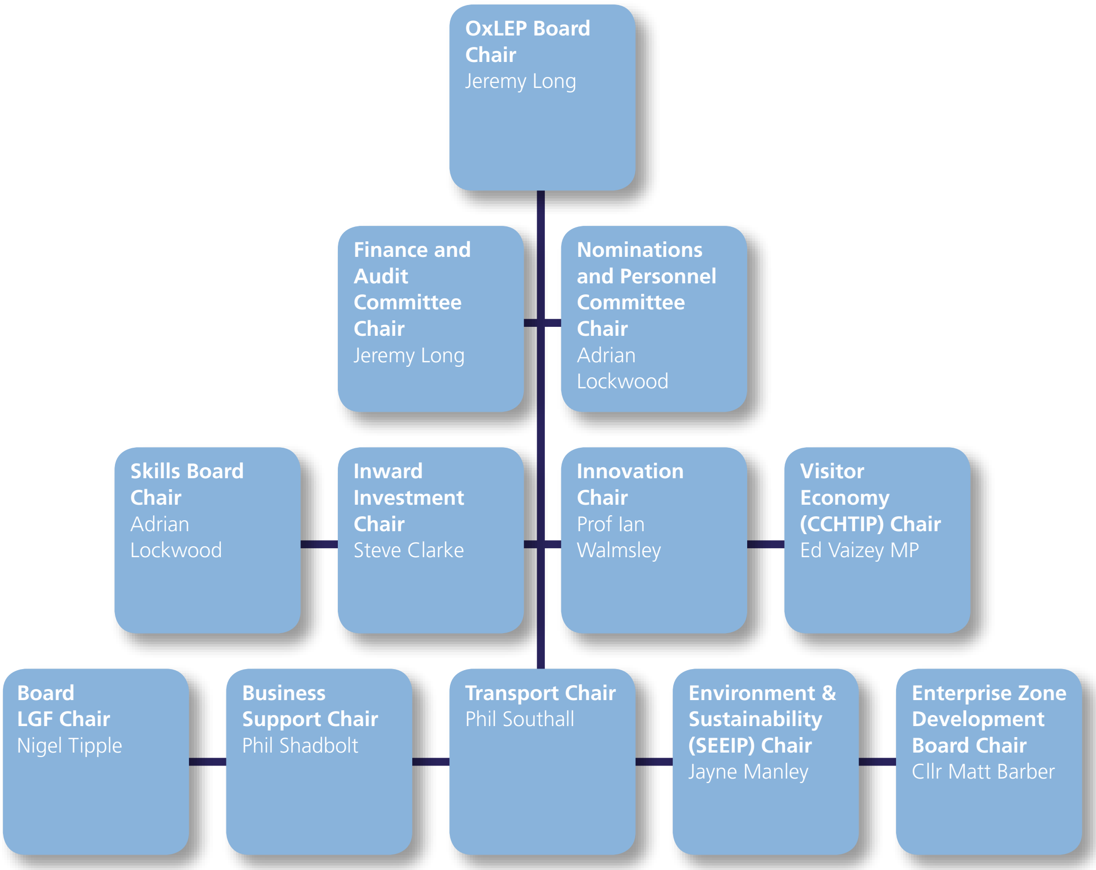
Risk	Response
The implications of Brexit are currently unknown but could be significant for the Oxfordshire economy	Overall, we will monitor carefully the evolving situation regarding Brexit negotiations and their consequences, and seek to take appropriate action as soon as decisions have been made. There are several specific aspects which we will need to keep under consideration: • the Government has confirmed they will guarantee funding for ESIF projects signed up until the 2016 Autumn Statement to the point at which the UK departs the EU. For projects signed after the 2016 Autumn Statement, funding for projects will be honoured by the Government, if they demonstrate good value for money and are in line with domestic strategic priorities. However, future funding arrangements are to be determined, and we will play a full part in seeking to influence the Government to ensure funding is targeted where it can achieve the biggest economic benefits; • Funding for universities may be affected by Brexit, both in relation to research income. For example, the University of Oxford received the largest EU financial contribution from the FP7 Framework Programme of any UK University (£437 million between 2007 and 2013). Current EU funded research programmes have been guaranteed by the Government, but there is uncertainty beyond that. In addition, both Oxford universities receive substantial income from foreign students, and recruit researchers and lecturers internationally, both of which could be affected by immigration controls; • Several of the county's research infrastructures are funded by the EU, such as the European Space Agency at Harwell, The future of these organisations will be carefully monitored as they are important to some of the key growth sectors of Oxfordshire's economy; • Immigration controls may affect Oxfordshire firms' ability to recruit and retain the best talent; • Future trading arrangements with the EU and other countries are currently uncertain – there may be resulting benefits and costs from Brexit; • Oxfordshire's rural area may be affected by any changes to funding support for agriculture as a result of leaving the EU and the CAP regime.
Business engagement in delivery of the SEP needs to be increased to ensure the continuing credibility of the strategy	Business engagement in the SEP refresh was lower than desired. To increase engagement in delivery, in addition to the role of business representatives on the LEP Board, we will refresh the membership of the LEP's subgroups (see Figure 12), to ensure full participation.
Funding for infrastructure may be below that needed to support sustainable economic growth	In collaboration with our partners, we will continue to press Government and private sector infrastructure providers (e.g. the energy and telecoms companies) to commit sufficient funds to support economic growth, In particular we will emphasise the negative consequences for the national economy of frustrating the growth ambitions of Oxfordshire's firms and the potential benefits of research commercialisation. However, we will review progress and revise plans if sufficient investment is not forthcoming.
Lack of affordable housing may constrain economic growth and frustrate the growth prospects of Oxfordshire's firms	As for infrastructure, we will continue to press for increased housing delivery across the county, and in particular the delivery of more housing that is genuinely affordable. The local authorities have lead responsibility as planning and housing authorities, however we will support their efforts to increase delivery and press Government if policy or funding changes are required to facilitate delivery, particularly of affordable homes.
The difficulty of managing growth to ensure it is compatible with sustainability objectives	There are many measures in the SEP to support the kind of economic growth which has positive environmental and social impacts, and to ensure jobs growth is balanced with housing delivery (including affordable housing) and infrastructure investment. However, we will monitor the impacts of growth and include further measures to manage growth sustainability if necessary.
Increasing congestion on Oxfordshire's roads could constrain economic growth and lead to a reduced quality of life for residents	The Local Transport Plan, the Science Transit Strategy and Oxford Smart City are all designed to reduce congestion, and the Oxfordshire Strategic Infrastructure Strategy will identify priorities for investment in the strategic transport system (as well as in other infrastructure). Efforts to increase housing delivery in the county, and to establish a strong link between housing, jobs and local services in all new development, should prevent further increases in congestion. Working with partners, we will continue to press for increased Government funding to tackle road congestion and to enable and encourage people to switch to other transport modes (e.g. by continued improvement in the capacity of the rail system through Oxfordshire).

The OxLEP Board is continuing to develop in order to deliver the SEP. New sub groups are being set up to drive forward the work on the Strategic Environmental Economic Investment Plan, the Creative, Cultural, Heritage & Tourism Investment Plan and the Innovation Strategy.

The OxLEP Board

The OxLEP Board is continuing to develop in order to deliver the SEP. New sub groups are being set up to drive forward the work on the Strategic Environmental Economic Investment Plan, the Creative, Cultural, Heritage & Tourism Investment Plan and the Innovation Strategy.

Figure 12: The OxLEP Board and sub-group structure



Wider governance arrangements

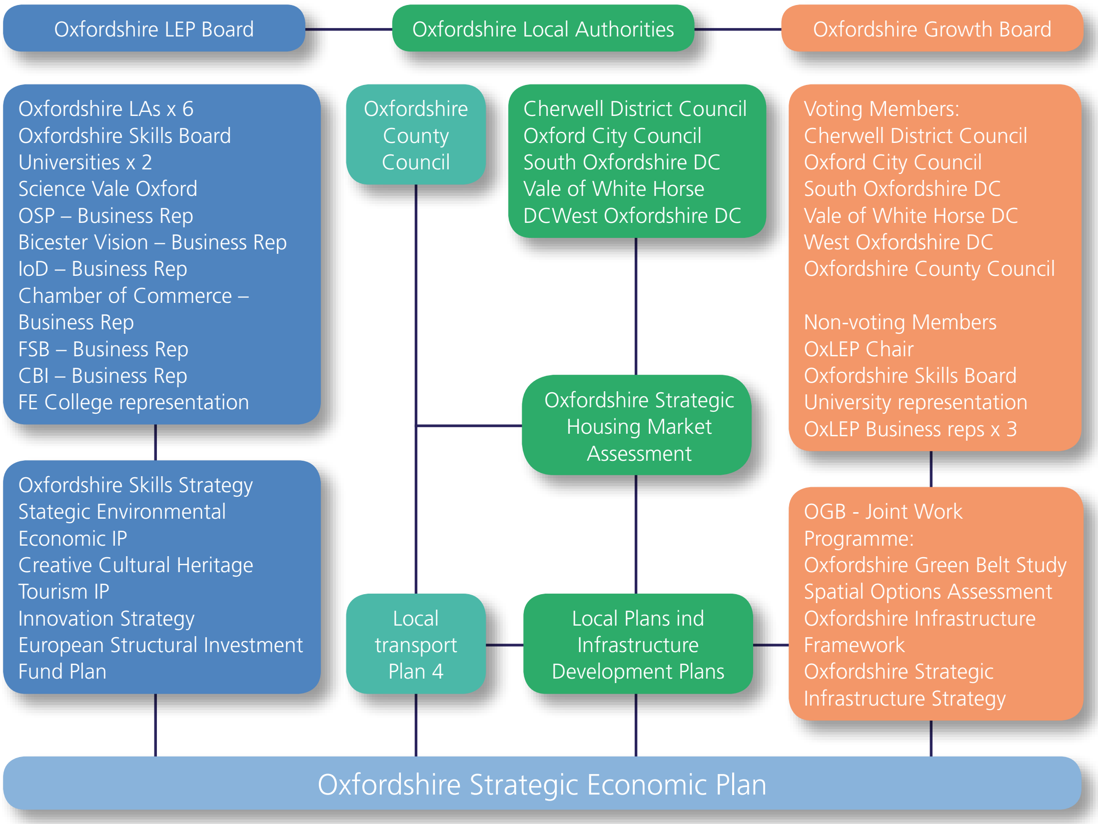
We will work closely with our key partners and stakeholders to deliver the SEP. Key relationships – and their links to wider strategic processes – are summarised in the graphic below.

This shows that:

- Oxfordshire's five district councils – as the local planning authorities – will continue to have responsibility for preparing and delivering Local Plans;
- Oxfordshire County Council, as the strategic transport and education authority, will continue to have particular responsibility for key elements of the transport and education infrastructure;

- All six local authorities (as voting members) – together with OxLEP and various other non-voting members – will continue to comprise the Oxfordshire Growth Board with a focus on the collaborative delivery of City Deal (and other) commitments.

Figure 13: Oxfordshire LEP, Growth Board and Local Authority Relationships and Responsibilities



> Whatever the detailed future governance arrangements, we are committed to securing an outcome which benefits Oxfordshire by increasing our collective ability to direct resources to our priorities and manage local service delivery and investment more efficiently.

Devolution proposals

The Oxfordshire local authorities are committed to securing significant devolution of responsibilities for service delivery and associated funding. Currently, there is on-going discussion about the governance arrangements related to devolution, both between Oxfordshire's local authorities and with central government. Further progress will also depend on the extent to which organisations such as Highways England, Network Rail the Homes and Communities Agency and the NHS are prepared to commit funding as well as devolved responsibilities to deliver infrastructure and service improvements.

Whatever the detailed future governance arrangements, we are committed to securing an outcome which benefits Oxfordshire by increasing our collective ability to direct resources to our priorities and manage local service delivery and investment more efficiently.

Engaging with business

This SEP Refresh has been strongly influenced by an extensive consultation process involving business, the public sector, community groups and individuals. Looking ahead to delivery, we want to maintain this engagement, and in particular to ensure that the business community plays a full role in guiding and supporting implementation of the SEP. To this end we will be refreshing the LEP Board sub group structure to ensure it remains fit for purpose and actively engaged with the wider business community.

Our wider responsibilities

Within this overall context, we – with our Board drawn from the business sector, the universities, further education colleges, local authority leaders and the voluntary sector – has overall responsibility for the delivery of the SEP.

We have developed a series of strategies which are "daughter documents" to the SEP. These include strategies for skills; environment and the economy; culture, heritage and tourism; and innovation. In addition, we have led on the development of a series of sector propositions which are being used, particularly, for inward investment marketing purposes.

We also have responsibility for the delivery of a series of programmes, including successive Growth Deals and ESIF funding (to the extent it continues in future). As explained elsewhere in this strategy, our role in relation to delivery varies, and much of it is managed through partner organisations.

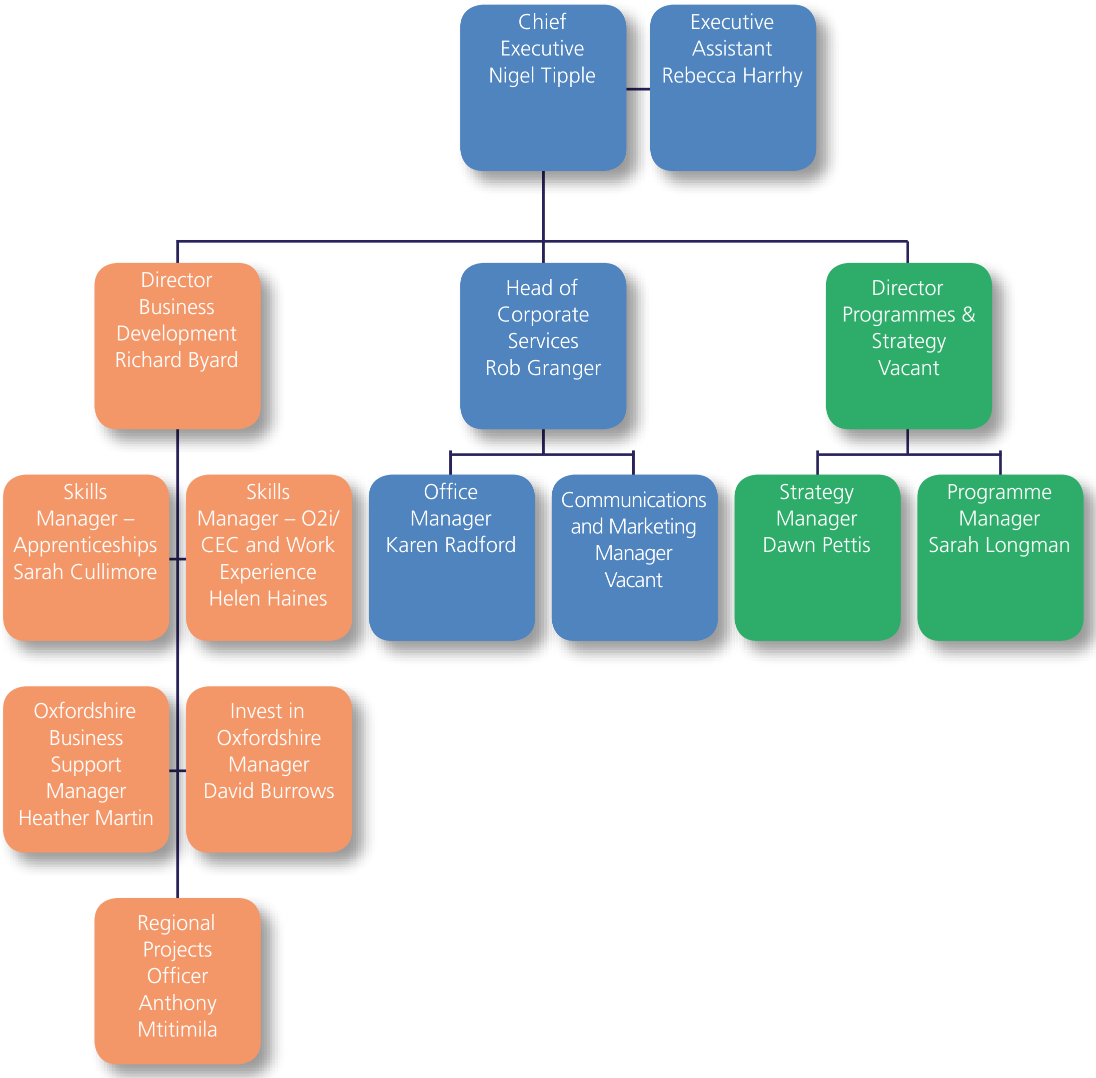
Delivery team within the LEP

Within the LEP, the key officers within the wider delivery team are introduced within Figure 14. The capacity of the team has, recently, been increased with the secondment of Oxfordshire County Council's Economy and Skills Team (from 1st April 2016).

We will continue to operate through our constituent parts/brands to deliver key SEP programmes. These include:

- Oxfordshire Apprenticeships;
- O2i (Opportunities to Inspire);
- Oxfordshire Business Support;
- Invest in Oxfordshire;
- Oxfordshire Work Experience.

Figure 14: LEP Executive Team



Annex A: Progress in delivering our Strategic Economic Plan

This annex provides detailed information on progress against specific objectives in the original SEP.

Snapshot of progress in delivering the objectives set out in our original SEP

KEY:
In relation to the original objectives set out in the SEP:

Green	…good progress appears to be being made
Amber	…some, or mixed, progress – but there is more to do
Red	…little or no progress has been made

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
People		
Increase the working age population qualified to level 2 and above to 90%	A	• The proportion of the population aged 16-64 qualified to level 2 and above has increased from 79% in 2012 to 82% in 2014 (source: APS) – so it is moving in the right direction. It is well above regional and national benchmarks. However there is some way to go before the target set out in the SEP is achieved.
Ensure our further education capital stock meets the needs of 21st century learners and employers	A	• In response to identified need, both City of Oxford and Abingdon & Witney Colleges have secured funding via OxLEP to develop state of the art facilities to support increased science, technology, engineering and mathematics (STEM) provision. City of Oxford College has also secured funding to develop the 'Activate Care Suite' to support increased social care provision

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Improve school attainment above the national average of 60.4% of GCSE students achieving at least five A* to C grades including English and Maths	G	• The way in which school attainment is measured has changed. For state-funded schools nationally, some 56.85% of GCSE pupils achieved at least five A* to C grades including English and Maths; in Oxfordshire the corresponding figure was 59.4%. These data relate to 2014 • However, despite the overall performance being very close to target, there are big disparities between different schools, and there are high teacher attrition rates due to the high cost of housing. However, although these are significant issues to be addressed, neither relate specifically to the objective
Increase the amount of Skills Funding Agency funding that supports our STEM sectors by 15% to better reflect our economic profile	A	• SFA financial data no longer allows the ability to scrutinise funding to subject areas; only to providers. • However given both City of Oxford and Abingdon & Witney Colleges have each secured in excess of £4m Local Growth Funding to develop STEM centres leading to over 650 additional STEM based learning outcomes annually from Sept 2018 (AY) it's reasonable to assume an increase in the percentage of funding that supports STEM will follow.
Deliver 1,150 more apprenticeships for young people with a focus on our priority growth sectors	A	• Latest full academic year figures are for 2014/15 and are rounded to the nearest 10. There were 2,510 16-24 year old Apprenticeship starts from August 2014 to July 2015, with 2,450 starts during the same period the previous year. This is an increase of 2.4%, and compares favourably with a decrease of 2.5% across the South East region

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Retain our graduate talent	A	• 26% of Oxfordshire's graduates remain in the county to work after completing their courses, including 18% of Oxford University graduates and 26 % of Oxford Brookes University graduates - See Infographic below • Retaining graduate talent continues to be challenging. Evidence suggests that around 45% of graduates of the University of Oxford and almost 20% from Oxford Brookes have opted to work in London (source: Future of Cities: Graduate mobility and productivity Foresight report published by Government Office for Science, March 2016) • In general, a high proportion of graduates employed in the south east are either those returning to the region (following study elsewhere) or those who studied locally (source: ibid)
Maximise our environment to encourage sustainable living, enhancing quality of life and a range of opportunities for people to learn, improve their skills, and improve health and well-being	A	• Some evidence of progress, particularly in major new developments like NW Bicester and Graven Hill
Place		
Provide between 93,560 and 106,560 new homes by 2031	A	• The number of dwellings completed in Oxfordshire has risen year on year, but it is still well adrift of the rate implied by the headline target that has been agreed by the local authorities (informed by the SHMA)
Accelerate the delivery of new homes	A	• As above

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Provide accessible housing that is affordable for the people who work in Oxfordshire	R	• Recent evidence suggests that Oxfordshire continues to experience real challenges • The latest available data from CLG are for 2013. These suggest that the ratio of median house prices to median earnings is 6.72 across England. It 8.66 across Oxfordshire, and in South Oxfordshire, the figure is 10.52
Deliver flagship gateway developments and projects that stimulate growth	G	• Progress is being made with regard to the delivery of some flagship projects such as Oxford Northern Gateway, North West Bicester and Harwell Campus
Deliver the Oxford Flood Risk Management Strategy	A	• Preferred option to be published in June 2016, Outline Business Case to be submitted to the Treasury August 2016
Ensure new housing makes innovative use of blue and green infrastructure	A	• Delivery is on-going
Enterprise		
Grow Oxfordshire's world-class technology clusters, leading to a GVA uplift of £6.6bn to 2030	G	• There is a lag in the production of GVA data are the latest available estimates from ONS are for 2014. These suggest that between 2012 and 2014, Oxfordshire grew at 5.0% per annum. This was faster than all other LEP areas except London (which grew at 5.8% per annum) • In its commentary, ONS comments on the period from 2008-2014. It states that "In Oxfordshire, strong growth in the information and communication sector and the real estate sector contributed to the overall strong GVA growth"

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Achieve a more balanced economy through fostering a dynamic private sector and new business start-ups, creating at least 85,600 new jobs by 2031	G	• Over recent years, Oxfordshire has seen the pace of jobs growth (i.e. on a workplace-based measure) exceed the indicative target that was quoted in the original SEP and has informed emerging local plans • Again though, there is a lag in the production of data. ONS' Jobs Density dataset suggests that the total number of jobs in Oxfordshire increased from 378,000 to 399,000 between 2011 and 2013
Capitalise on the global reputation of Oxfordshire's knowledge base translating academic and research excellences into wealth generation for all our residents	G	• We have secured government funding for four new innovation centres to support the commercialisation of research: an Innovation Accelerator for advanced engineering businesses at Begbroke; a Bioescalator to support the commercialisation of bioscience and medical related research, in Oxford; the Harwell Innovation Hub, focused on open innovation; and the UKAEA Culham Advanced Manufacturing Hub, focused on remote handling technologies • Oxford University and Oxford University Innovation have established a £320m fund, Oxford Sciences Innovation, to invest in spin outs from the University of Oxford, Culham and Harwell

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Fulfil our potential as an internationally renowned business, academic and research centre to attract a minimum of 30 new high value foreign direct investments per year	A	• 28 foreign direct investments were supported in Oxfordshire during 2015/16 - 14 of which were high value. 8 of the investments were within the Life Sciences sector. • The county has also benefitted from substantial additional investment by major foreign owned firms already in Oxfordshire, such as BMW, and new investment by international agencies such as the European Centre for Space Applications and Telecommunications (ECSAT) • Following deeper analysis of key sectors, detailed proposition documents were published in January 2016 to develop a greater understanding of the Oxfordshire offer with UKTI overseas posts and local partners and support the increased marketing, promotion and targeting of high value investment opportunities.
Connectivity		
Improve accessibility of international connections through direct rail connections from The Knowledge Spine to national hubs and airports and reduced congestion on strategic highway links, particularly the A34	A	• Chiltern Railways has invested in a direct fast link to London Marylebone from the new Oxford Parkway station via Marylebone • Significant improvements to the strategic road network, such as to A34 junctions with the M40, the Peartree interchange north Oxford, and at Milton/Didcot and Chilton • The National Infrastructure Commission has been asked by the Government to investigate options for improving transport links between Oxford and Cambridge
Reduce the distance and barriers between our core economic areas across the Knowledge Spine through providing a minimum level of public transport services of four per hour and maximum journey time of 30 minutes	A	• Implementation of the first phase of the Oxford Science Transit strategy, providing a direct link between Oxford and Harwell • Improved access to Milton Park; and improvements at Botley

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
Increase the capacity and improve the efficiency and resilience of our local transport network by reducing congestion on key highway links	R	• Despite some improvements to the strategic road network in Oxfordshire, particularly at key junctions, the evidence gathered by Oxfordshire County Council shows that levels of congestion on Oxfordshire's roads has increased over recent years
Spread the benefit of transport investment across Oxfordshire	A	• Increasingly, the focus of transport planning is on a series of corridors across Oxfordshire in addition to the Knowledge Spine. The purpose of this broader emphasis is to encourage a strong link between transport investment and the main locations of housing and employment growth • However there have been recent cuts to rural bus services
Explore the potential of 5G technologies underpinned by the development of the 5G Innovation Centre for Future Mobile Communications and Internet Technology	A	• TBC
Increase connectivity between people and the quality natural environment to develop integrated sustainable transport routes	A	• Preparation and the beginnings of implementation of the Oxford Science Transit strategy

Annex B: Summaries of Oxfordshire's cross-cutting strategies

Box B1: Oxfordshire's Creative, Cultural, Heritage and Tourism Investment Plan (CCHTIP)

The creative industries and tourism play a key role in economic growth: 9.5% of employment in the county is already in tourism (32,000 jobs). Indeed, there is a 'virtuous circle of growth, quality and sustainability' at play, where each sector depends on the other for its success (creative industries to sell the tourism offer, for example), but each is independently driving economic growth, innovation and competitiveness across the county. The CCHTIP therefore provides a framework for growth which 'shapes a new agenda for joined-up working and cross sector commitment,' with CCHT sectors at the core.

- Four thematic areas were developed for the CCHTIP and inform the proposals:
- Productive and engaging experiences
- Skills, talent development and business growth
- Creative place-making
- Collaboration (a cross-cutting theme)

Experience Oxfordshire is the Destination Management Organisation for Oxfordshire, with a brief to encourage cross-sector collaboration and drive economic growth. The county already receives sizeable inward investment, due to the strength of its cultural offer: galleries, museums, music services, stately homes, festivals and events; as well as Oxford city, market towns and villages, and a beautiful rural landscape. The aim is to use the creative industries to enhance the experience for visitors and residents.

Oxfordshire is home to several thousand creative SMEs and bigger businesses. The county's strengths lie in publishing, software, games and design/crafts. Many of these are based outside Oxford, in rural towns and villages, heightening the need for excellent digital connectivity in rural areas. They are innovative and resilient: flexible responses to change have enabled businesses and the local economy to adapt and avoid economic stagnation, by developing new innovative business models.

Many in-county organisations – including Oxford University, Oxford Brookes University and schools and colleges – are already working with the Oxfordshire Skills Board, to ensure the county's skills need is met at all levels. The county's strong library network helps with this.

The CCHTIP matters because Oxfordshire is 'set for significant growth' and needs to prioritise the sectors that will help to achieve this. The county will retain its competitive edge only by 'connecting [its] strengths and coordinating [its] offer,' and innovating in order to win investment which is becoming ever-harder to secure

Box B2: Oxfordshire's Strategic Environmental and Economic Investment Plan (SEEIP)

Oxfordshire's natural environment has played a major part in the county's economic and social development and it will continue to be a vital part of its future. Its natural capital - including its land, soils, air, water, animals and plants – is distinctively rich and diverse. These assets provide a huge range of financial and societal benefits, from food and energy, through flood protection and pollution clean-up, to outdoor recreation, health and inspiring landscapes and surroundings.

The county's residents, businesses and other organisations - whether they are based in the City of Oxford, the market towns or numerous villages - all benefit economically and culturally from these assets.

These assets are in decline and investment is needed to reverse this damage. As the economy and the population grow, and the effects of current and future climate change are felt, the county needs to be prepared in order to minimise damage to the natural environment, reduce risk and protect the vital services provided to the people of Oxfordshire.

Recent advances in our understanding of the services provided by our natural capital offer major opportunities to repair and enhance the latter. Improvements nearly always bring about multiple "co-benefits" with added economic value, efficient use of natural resources and more pleasant surroundings, all of which make the county such a desirable place to live and work.

There is also the scope to develop new innovative environmental management strategies, products and services for export, attracting inward investment and creating jobs. A specific opportunity lies in the new field of "green infrastructure" with nationally pioneering work taking place in the county.

Environmental expertise within Oxfordshire is extensive: both the University of Oxford and Oxford Brookes University, together with external research centres, manufacturers, businesses, charities and community groups, are working together (and separately) to protect and maintain the natural environment. The SEEIP emphasises that 'the expertise and activity across the county will be even more effective when harnessed, coordinated and targeted towards common goals.' Collaboration on working towards a number of environmental priorities is the aim of the SEEIP.

The vision of the SEEIP is: "for Oxfordshire to benefit from a high quality, resilient environment which supports economic growth, development, health, wellbeing and prosperity for all". This will be achieved by an innovative, efficient environmental sector working together with other public and private sectors to:

- Attract and deliver investment in the county
- Ensure sustainable, long-term stewardship of natural capital
- Develop new and improved environmental knowledge, goods and service

This leads to five strategic priorities for investment:

Growing the green economy in Oxfordshire

1. Enhancing the quality and resilience of urban areas
2. Improving management of land to reduce flood risk, enhance water resources, and promote biodiversity
3. Promoting and enabling access to the countryside
4. Engaging people in the environment and enabling more sustainable lifestyles

Box B3: Oxfordshire's Innovation Strategy

The draft sets out a strategy to better understand, increase, and make use of innovation in Oxfordshire. The strategy is structured around ten key themes, each of which underpins innovation across all sectors. For each theme, the needs, drivers and existing work are explored (illustrated by case studies of current initiatives) as well as the challenges that remain for an innovation-driven economy and a 'wish list' of projects that would deliver this vision. The ten themes are:

1. **Understanding the Ecosystem** – a deeper understanding of innovation activities in Oxfordshire will allow for better support of underdeveloped areas and identify opportunities for interactions across disciplines.
2. **Strengthening our Networks** – the networking community is thriving in Oxfordshire, but the challenge is to develop and maintain connections between sectors.
3. **Building Innovation Spaces** – despite the growth of innovation spaces across the county, increasing demand means that Oxfordshire needs both a strategic and tactical approach to better understand where to develop new innovation spaces.
4. **Reinforcing the Science and Research Base for Innovation** –the science and research base must be reinforced through translation to the wider community and increased accessibility to entrepreneurs and businesses.
5. **Innovation for All** –innovation needs to be accessible and adopted by all sectors. The research and knowledge base in Oxfordshire must impact all aspects of the economy, with innovation incorporated into environmental, cultural and heritage programmes to drive growth in the region.
6. **Innovation for Social Good** –building strength in social enterprise by linking social innovators, encouraging sustainable businesses for social good, and better funding, facilities and networks.
7. **Nurturing Talent and Developing Skills** – Oxfordshire has one of the most highly skilled workforces in the UK, but the growing challenge is attracting, developing and retaining skilled workforces in the region.
8. **Attracting Significant Business** – making Oxfordshire attractive to innovative companies and institutions. Investment to provide business space and build networks at a regional, national and global scale will be required to attract companies into the region.
9. **Attracting Capital** – ensuring that capital is available for innovative businesses. A variety of funding sources are available in Oxfordshire but resources are more limited in some sectors and there is a need for a more closely networked and mutually reinforcing culture.
10. **Embedding Innovation in the Ecosystem** – developing Oxfordshire as a testbed for innovation to accelerate the adoption and accessibility of innovations across the ecosystem. Disciplines such as Healthcare, Smart City and Low Carbon have led the way in using Oxfordshire as a living laboratory

Box B4: Oxfordshire Skills Strategy to 2020

Oxfordshire has one of the most innovative and highly-skilled populations in England. However, a small but important proportion of its population are unable to fully participate in the labour market because they lack the skills and opportunities to do so. One of the key aims of the Skills Strategy is to help these residents – through specialist and on-going support - into paid employment. Another key aim is to retain highly-skilled graduates from its two universities.

A highly-skilled workforce is crucial for economic growth and skills development is a core priority for OxLEP. In collaboration with the Oxfordshire Skills Board, it has been working to transform the skills landscape. Starting with schools and colleges, OxLEP has worked to improve careers advice and apprenticeship opportunities from the bottom up. However, this requires 'a step change in approach, attitudes, focus and aspiration from partners,' as well as young people. In order to achieve sustainable economic growth which maximises local employment opportunities for all, there is a need to align:

- Young people: given appropriate skills training and opportunities in county skill shortage areas
- Providers: who must meet employer demand for worker training in (current and future) growth sectors, and
- Employers: who must become more engaged with the county's skills agenda.

In so doing, Oxfordshire hopes to develop and nurture: a workforce which is aligned with employers' needs; a flexible training and education sector which responds to employers' needs and which 'produces employment-ready young people'; and a coordinated services approach which enables young people to transition easily from education to employment.

In order to achieve these goals, the Skills Strategy sets out five Strategic Priorities to 2020:

- SP1) To meet the needs of local employers through a more integrated and responsive approach to education and training
- SP2) Creating the 'skills continuum' to support young people through their learning journey
- SP3) Up-skilling and improving the chances of young people and adults marginalised or disadvantaged from work
- SP4) To increase the number of apprenticeship opportunities
- SP5) To explore how we can better retain graduates within Oxfordshire to meet the demand for the higher level skills our businesses need.

Annex C: Explanation of the relationship between OxLEP, the SEP and development planning

The purpose of Local Enterprise Partnerships is to *"provide the clear vision and strategic leadership to drive sustainable private sector-led growth and job creation in their area"* (Local Growth: Realising Every Place's Potential; BIS, 2010).

To do this, LEPs are expected to produce and maintain an up to date Strategic Economic Plan (SEP). This has various purposes, including steering bids for funding for economic development, skills and infrastructure projects. Oxfordshire benefits from strong economic growth, therefore the SEP focuses on supporting and managing the economic growth to ensure sustainable and inclusive outcomes.

In producing Local plans, Oxfordshire's local authorities are required to give due consideration to the SEP. They are not bound by what it says if other factors (e.g. environmental constraints) are considered to be more important, but there must be a robust case for overriding the SEP which will withstand scrutiny by the Government.
Local Planning Authorities have a statutory duty to prepare and maintain an up-to-date Local Plan, which sets out the proposed scale and location of development in the area over the next 15 to 20 years and in doing so seeks to balance economic, social and environmental considerations. This is different from the role of the LEP, which is expected to focus on supporting economic growth, albeit growth which is both sustainable and socially inclusive.

Part of the essential evidence base for a Local Plan is an assessment of the likely future growth of employment, and of the requirement for new homes. The expected scale and characteristics of employment growth are usually assessed using econometric forecasts which take into account past trends and policy changes. The housing requirement is assessed through a Strategic Housing Market Assessment (SHMA), which should be produced for the functional housing market area, usually adjusted to coincide with local authority boundaries, and which is required by the National Planning Policy Framework (NPPF) to be kept up to date.

In Oxfordshire, the five District Councils, supported by the County Council, decided jointly to commission a SHMA for the whole County, within which the requirements for individual districts were identified. The work was led by GL Hearn. Separately, the local authority client group commissioned employment growth forecasts from Cambridge Econometrics, in association with SQW, in order to inform the SHMA and Local Plans. The methodology used to produce the Oxfordshire SHMA was consistent with Government guidance and the housing requirements identified took account of forecast employment growth as one factor influencing future housing needs. There was a consultation on the SHMA methodology and all local authorities subsequently accepted the final report of the SHMA.

The original Oxfordshire SEP was prepared at the same time as the SHMA, in 2013. It incorporated the figures for employment growth produced for the SHMA, and the housing requirement figures produced by the SHMA. The employment and housing growth figures in the Oxfordshire SEP are therefore a product of the local planning process (i.e. the SHMA), not an input to it.

The SEP Refresh is using the same figures for growth as the original SEP and the SHMA. There are three main reasons for this:

- Employment growth since 2011 has been stronger than indicated by the employment forecasts used by the SHMA and the SEP. This is during a period of economic recovery, so the actual figures may be expected to be positive. However, it suggests that the employment forecasts are soundly based and are a good basis for planning

- The SHMA has been tested at the Cherwell Local Plan Examination in Public in 2014 and the Inspector's report of June 2015 concluded that it formed an appropriate basis for the proposed level of housing growth in Cherwell. This effectively endorsed the SHMA as a sound evidence document which underpins the development of Local Plans in Oxfordshire

- It is important that there is consistency between Local Plans and the SEP.

Note that during the workshop discussions that informed the development of this consultation draft of the refreshed SEP, some attendees expressed support for a county-wide approach to the environmental, social and economic assessment of the impact of the figures contained within the SHMA.

Annex D: Relationship between Priorities and Actions for each Programme

People programme

Priority	Action
Education and skills	
Ensure the skills provision is aligned more effectively with the needs of employers	Implement the Oxfordshire Skills Strategy
Understand – and respond to – the aspirations and frustrations of young people as they seek to build their lives and their careers in Oxfordshire, by creating a 'skills continuum' to support them through their learning journey	Implement the Oxfordshire Skills Strategy
Increase STEM skills among Oxfordshire's young people	Implement the Oxfordshire Skills Strategy
Increase the number of apprenticeship opportunities	Implement the Oxfordshire Skills Strategy
Reducing exclusion	
Address exclusion from the labour market by upskilling and other measures to help young people and adults marginalised or disadvantaged from work	Implement the European Social Fund programme and the Community Employment Plan agenda
Recruitment and retention	
Emphasise the importance of people as well as firms in terms of inward investment	Continue to deliver Oxfordshire Apprenticeships Implement the Post-16 Review Seek clarity from government regarding the status on EU and other non-UK citizens working in the UK and the current and future barriers to attracting foreign national to work in the UK.

Place programme

Priority	Action
Support for the Development Plan system and place making	
Communicate the priorities of the SEP to local planning authorities in their preparation of Local Plans and to communities who are preparing neighbourhood plans	Work through the Oxfordshire Growth Board to ensure full communication of SEP priorities. Participate in consultation on Local and Neighbourhood Plans to ensure they take into account SEP priorities
Within the Local Plan process, ensure high quality housing is delivered in a sustainable manner.	Bring forward a series of interventions which support our place shaping priorities
Support innovative approaches to the supply of genuinely affordable housing Support the delivery of new housing and employment for example through securing funding for infrastructure improvements	Develop an integrated approach to strategic planning for infrastructure, housing and employment that builds on Local Plans and existing joint working through the proposed Combined Authority Growth Board Develop a partnership with the HCA to develop and support a Housing Investment Strategy and consolidated funding allocation to address the county's housing priorities and enable delivery of the mix of housing needed to support economic growth, including a substantial proportion of starter homes Develop a Land and Property Partnership Board to support the use, deployment and regeneration of public land and other major landholdings Develop local housing development companies with access to a revolving investment fund and supported by strengthened local authority CPO powers to unlock housing delivery Locally set planning fees to increase and align resources needed to support the significant growth in strategic site delivery

Priority	Action
Support the design and delivery of innovation districts in suitable locations across the county	Provide support and advice on economic and employment aspects of proposed innovation districts (comprising mixed use, high density developments providing space for innovative businesses of different sizes, an appropriate mix of housing for the local workforce, supporting facilities and services and a high quality built environment). Some of these will be within existing urban areas, such as Oxford's West End and Osney Mead. Others may form part of new developments: for example, the proposed West Oxfordshire Garden Village
Support for environmental and social sustainability	
Ensure the high quality of our built and rural environment is maintained and manage change in ways which produce better local outcomes socially, environmentally and economically	Support the implementation of the EAFRD programme for local tourism, food and business projects, and the Strategic Environmental and Economic Investment Plan Support the delivery of Smart Oxford.
Support implementation of climate change targets	Support the ERDF Low Carbon programme, and initiatives such as Smart Oxford (http://oxfordsmartcity.uk/cgi-bin/index.pl)
Dealing with infrastructure constraints	
Support production of development plans which fully consider the availability and potential capacity of infrastructure in the broadest sense Ensure all homes and businesses have access to resilient broadband with at least 24 MG download	Support the preparation of the Oxfordshire Infrastructure Strategy Support the utilities study to map utilities capacity against Local Plan ambitions Support the preparation of a locally-informed energy strategy for Oxfordshire
Provide continued support for the implementation of flood alleviation schemes	Use Local Growth Fund to contribute to funding Upstream Flood Storage at Northway

Enterprise programme

Priority	Action
Support for all businesses in all parts of the county	
Improve productivity across all sectors to create 'more for less' Encourage businesses to fully understand and mitigate their impact on the natural environment, exploiting opportunities available within the knowledge economy and new approaches such as the circular economy and natural capital accounting Link firms to networks and support, both within and across sectors	Implement the Strategic Environmental and Economic Investment Plan, the Innovation Strategy and the ERDF Low Carbon programme Continue to advance the delivery of business support through Oxfordshire Business Support and Network Navigator programme Implement the Innovation Strategy
Focus on export promotion among businesses with the potential to operate in international markets Improve national and international marketing of Oxfordshire and its firms	Prioritise the activities of Invest in Oxfordshire to promote inward investment into Oxfordshire by continuing to market the county (nationally and internationally) as an attractive place in which to locate a business. Invest in Oxfordshire will also build further on our already strong links with UKTI to support increased exporting by Oxfordshire firms.
Support start up and scale up of businesses in Oxfordshire	Continue to advance the delivery of business support through Oxfordshire Business Support and Network Navigator programme Undertake a review of innovation spaces in Oxfordshire, identify gaps in existing and planned provision, and seek funding and other support to improve provision.
Celebrate Oxfordshire's business success across all sectors to raise the profile and to encourage the next generation of entrepreneurs	Continue to sponsor Venturefest, West Oxfordshire Business Awards, Cherwell Business Awards and Oxfordshire Business Awards
Encourage all employers to provide flexible jobs that can work for those on the margins of the labour market	Implement the Skills Strategy and work through our sub groups to build relationships with businesses to influence their approaches to job specification and recruitment

Priority	Action
Support for globally significant, wealth creating sectors	
Support the local commercialisation and application of technologies developed by Oxfordshire's research and business communities, particularly in areas which improve environmental sustainability and health outcomes	Support the continuation and where possible strengthening of local funds which support commercialisation, including for example Oxford Sciences Innovation and the Oxford Investment Opportunities Network
Support for large employment sectors	
Support inter-relationships between the tourism economies of Oxfordshire and surrounding areas, such as the Cotswolds	Implement the CCHITP
Support other employment sectors which include retail, logistics & distribution, health and social care, and education	Implement the cross cutting strategies (see Annex B)

Connectivity programme

Priority	Action
Improvements to physical connectivity in Oxfordshire	
Overcome current capacity bottlenecks on road and rail networks	Support for the implementation of the Oxfordshire Local Transport Plan 2015-31 which both addresses existing congestion where it is damaging the economy or hindering economic growth, and identifies ways to avoid exacerbating transport problems due to housing and employment growth
Develop a programme for strategic infrastructure improvements linking and supporting planned growth of housing and employment	Support development and then implementation of the Oxfordshire Strategic Infrastructure Strategy Implement the Science Transit Strategy Ensure, through the planning process, that connectivity improvements are linked to the scale and location of planned growth
Support the use of technology and other measures to reduce congestion, improve connectivity and reduce pollution	Implement the Smart Oxford Strategy. Support measures which are agreed through local democratic processes such as a workplace parking levy, zero emission zones and iMaaS

Priority	Action
Support schemes which improve active and healthy forms of travel	Implement the Oxfordshire Active & Healthy Travel Strategy and support specific initiatives such as the Science Vale Cycle Network
Improvements to virtual connectivity in Oxfordshire	
Deliver continual improvement to give sufficient broadband speed and network capacity for modern business throughout Oxfordshire	Continue to support the better Broadband for Oxfordshire initiative to complete county-wide broadband coverage Work with mobile phone companies to ensure there is a good mobile signal everywhere in Oxfordshire
Strengthen network coordination across sectors	Continue to deliver the Network Navigators initiative
Improvements to connectivity in a regional context	
Work with partners' in England's Economic Heartland Strategic Transport Forum to develop strategies to improve the capacity of transport corridors across Oxfordshire and into surrounding areas	Support the Department for Transport and National Infrastructure Commission's reviews of East West rail and road links between Oxford, Milton Keynes and Cambridge Support TV Berkshire LEP in relation to a Third Thames Crossing

Annex E: List of acronyms

CCHTIP	Creative, Cultural Heritage and Tourism Investment Plan
EAFRD	European Agricultural Fund for Rural Development
ERDF	European Regional Development Fund
ESF	European Social Fund
ESIF	European Structural and Investment Funds
NEET	Not in Employment, Education or Training
OxLEP	Oxfordshire Local Enterprise Partnership
SEEIP	Strategic Environmental and Economic Investment Plan
SEP	Strategic Economic Plan
SFA	Skills Funding Agency
STEM	Science, Technology, Engineering and Mathematics

Our Priorities

people

Delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, filling skills gaps, and seeking to ensure full, inclusive, employment and fulfilling jobs;

place

Ensuring a strong link between jobs and housing growth, and providing a quality environment that supports and sustains growth; and offering the choice of business premises and homes (including more homes that are genuinely affordable) needed to support sustainable growth whilst capitalising on and valuing our exceptional quality of life, vibrant economy and urban and rural communities;

enterprise

Emphasising innovation-led growth, underpinned by the strength of Oxfordshire's research, business collaboration and supply chain potential; recognising and reinforcing the significant contribution made by all sectors, in all parts of Oxfordshire and all types of business;

connectivity

Enabling people, goods and services to move more freely, connect more easily; improving broadband and mobile coverage and capacity; and providing the services, environment and facilities needed by a dynamic, growing and dispersed economy.

OxLEP
driving economic growth

0345 241 1196
info@oxfordshirelep.com
www.oxfordshirelep.com

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