~~Creating the Environment for Growth~~

~~Strategic Economic Plan for Oxfordshire – Consultation Draft~~

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Refreshing Oxfordshire's Strategic Economic Plan

Draft – revised following public consultation

August 2016

Foreword

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Brexit

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Foreword

I am delighted to present this consultation draft of our updated Strategic Economic Plan for Oxfordshire. You now have the opportunity to read this Plan and to make your views known to us by Friday 27 May 2016.

Our first Plan, published in 2014, put our already prosperous county on the road to increased economic strength meaning that even more of our residents have the opportunity to share in the wealth created. In this new Plan you will be able to read more about how we have helped our economy grow, and how we aim to build on this growth in the years to come.

Our starting point is the recognition of Oxfordshire's key asset – our beautiful environment and the quality of our natural capital resources – our landscape, waterways and parks and open spaces in our city, towns and villages. Other benefits flow from this asset – Oxfordshire has a wealth of heritage and cultural attractions which bring in millions of visitors every year. We also have a growing population that is highly motivated and skilled. All this makes our county an appealing place for aspiring national and international businesses seeking a home in the UK and in which local businesses can thrive.

As we demonstrate in this Plan, Oxfordshire's strong science and innovation base provides us with a unique position at the vanguard of developing an innovative low carbon society and economy in line with local and global goals. These assets – environment, heritage/culture, innovative ambitions – flow through this Plan and feed in to our four interlinked themes:

- People
- Place
- Enterprise
- Connectivity

We know there are challenges. We all at some point have had to endure traffic congestion; we all know someone who is struggling to find housing they can afford; and we know that not all of us have qualifications or are gainfully employed.

But in this Plan you will find that we take these challenges seriously, and attempt to offer ways to help address them.

Finally, whilst we want economic growth, this must not be at any cost. But if there is any place in the UK that can balance the need to grow and develop whilst protecting and enhancing the assets that we value most, it is Oxfordshire!

Nigel Tipple
CEO, Oxfordshire Local Enterprise Partnership

Executive Summary

This ~~Refresh~~refreshed version of the Strategic Economic Plan (SEP) for Oxfordshire ~~reflects our commitment to continue to nurture Oxfordshire's outstandingly successful economy in a manner that reflects new~~takes into account evidence that has become available since the first SEP was produced in 2014, including ~~some~~ new strategies relating~~, for example,~~ 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. But like its predecessor, this refreshed SEP signals our strong ongoing commitment to sustainable economic growth across the county.

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 ~~it is both sustainable~~sustainability and ~~inclusive.~~inclusivity. Compared to the original SEP, this refreshed version is higher level, shorter and clearer. It ~~has an emphasis~~focuses on ~~the~~ strategy rather than the details of delivery.

The Vision of the SEP is that

> ***By 2030, Oxfordshire will be recognised as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence.***

Oxfordshire is ~~set apart by~~notable for the excellence and scale of innovation, enterprise and research within the county, and ~~as a consequence,~~for the dynamism of its economy ~~is already successful: for example,~~: 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 ~~our~~its most successful firms ~~also~~ 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 are ~~still~~ issues of sustainability and inclusion ~~to address, and~~ that must be addressed. There is also a need for greater resilience in the face of increased global risks ~~to continued local growth. So by harnessing~~and uncertainty.

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

- **Vibrant:** a place where ambitious businesses and people thrive; and where ~~aspiring~~ young people choose to build their careers and their lives
- **Sustainable:** environmentally (taking into account patterns of resource use, climate change, carbon emissions, heritage ~~and patterns of resource use~~assets), socially (reflecting the needs and character of communities) and economically (with businesses and others choosing to re-invest)
- **Inclusive:** where all residents and businesses have a real stake and voice in determining the county's future economic narrative and contributing fully to it
- **World-leading:** recognised globally for its dynamic innovation ecosystem, founded on world class research and ~~fueled~~fuelled by enterprise, all within an environment of the highest quality.

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These outcomes will be achieved through four wide-ranging programmes ~~focusing on people, place, enterprise and connectivity. In~~, each ~~of these programmes, there are on-going projects and commitments. We have also identified~~with priorities to 2020, and a number of key action areas. The programmes ~~include~~are:

- **People** – delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive, employment and fulfilling jobs
- **Place** – ensuring a strong link between jobs and housing growth, and providing ~~both the~~a quality environment that supports and sustains growth; and offering the choice of business premises and homes needed to support ~~"good"~~sustainable growth whilst capitalising ~~upon~~on and valuing our exceptional quality of life, vibrant economy and ~~dynamic~~ urban and rural communities
- **Enterprise** – emphasising innovation-led growth, underpinned by the strength of ~~university and other~~Oxfordshire's research, business collaboration and supply chain potential; ~~and also~~ recognising and reinforcing the significant contribution made ~~through social enterprises in~~by all sectors, all parts of Oxfordshire and all types of business
- **Connectivity** – ~~allowing~~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 ~~also~~ ensure that the inter-relationships and opportunities across these ~~programme areas~~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 ~~and to complement activities under each of these programme areas.~~

There is ~~also a~~an important cross-cutting spatial dimension to the SEP. We will maintain the principal spatial focus on ~~the Oxfordshire~~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 ~~other parts of the county which help implement the SEP.~~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, ~~OxLEP~~the LEP will work through clear governance and management arrangements, building on the substantial progress that has been made over the last two years~~. We will work closely with our~~ 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 and the Oxfordshire Growth Board, and the county's businesses, voluntary organisations, academic institutions, and residents.

~~We hope that a wide range of stakeholders from across Oxfordshire will take time to read through this document. We will welcome any comments on it by 20th May 2016. Full details of how to respond are available at: www.oxfordshirelep.com/content/strategy~~

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Introducing ~~the consultation draft of our~~ Oxfordshire's refreshed Strategic Economic Plan

It is now two years since Oxfordshire Local Enterprise Partnership (OxLEP) published its first Strategic Economic Plan (SEP). ~~Subsequently – as we explain later –~~ 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 ~~is entirely our own. It is not a response to any requirement from Government. Nor has it been advanced with an eye to specific bidding processes.~~

~~Instead, it~~ has been prompted by our desire to continue to nurture Oxfordshire's ~~outstandingly successful~~ economy ~~in a manner that~~. 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 ~~local government~~ devolution** will progress substantially over the months/years ahead.

Through the refresh process, we have sought to ensure that Oxfordshire's SEP is ~~intended to be~~ a **widely-owned "economic route map"** for the county as a whole. It focuses on realising the opportunities in Oxfordshire to achieve **sustainable economic growth** and to conserve its natural resources and built ~~environment.~~heritage. It has been informed by a series of public workshops ~~through~~ and it has benefited from a full public consultation (which ~~the work of OxLEP has been scrutinised, probed and tested. Through this refreshed document, we are responding positively whilst retaining our primary focus on OxLEP's core brief: the economic performance, potential and prospects of Oxfordshire.~~generated almost 300 written responses).

~~Compared to the original SEP, this refreshed version is:~~

- ~~**Higher level** – with a greater focus on medium term priorities and very much less emphasis on "Projects"~~
- ~~**Shorter** – with an emphasis on the strategy (not the details of delivery)~~
- ~~**Clearer** – particularly in explaining the relationships with other processes, especially the primacy of strategic planning.~~

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8 **Box 1** Creating the Environment for Growth: Strategic Economic Plan for Oxfordshire- Consultation Draft

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

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Our Vision

By 2030, Oxfordshire will be recognised 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 inquisitive appetite for progress that permeates Oxfordshire's: **What we mean by sustainable economic** life. It includes innovation driven by science and technology, particularly in life sciences, space technologies, digital sectors, automotive and motorsport. It also includes innovation in heritage, tourism and culture; and in the use of environmental assets. 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 which must be harnessed fully to deliver our Vision.

- **Enterprise is** another defining feature of Oxfordshire. Within the county, there are around 30,000 enterprises (or 35,000 local units). These range from major companies – like BMW at Cowley, and publishing houses like Oxford University Press (OUP) and Blackwell UK – through to micro businesses (noting that nearly 90% of enterprises employ fewer than 10 people). Oxfordshire's enterprises span fast emerging global players in knowledge based sectors (e.g. Sophos, Adaptimmune and Immunocore) and firms that are focused on service delivery in local markets. Within Oxfordshire, there is also a vibrant social enterprise sector. The process and depth of enterprise must contribute to the pursuit of the Vision.

- **Research** undertaken in Oxfordshire is outstanding. It includes 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 harnessing these three overarching drivers, we will ensure that by 2030, Oxfordshire's economy is rightly recognised to be:

- **Vibrant:** Oxfordshire will be a place where ambitious businesses and people thrive; and where aspiring 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 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 placeThe 1987 Brundtland Report defined 'sustainable development' as development that is recognised globally for its dynamic innovation ecosystem, founded on world-class research and fuelled by enterprise, all within an environmentmeets the needs of the highest quality.

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~~10 Creating~~present without compromising the ~~Environment for Growth:~~ability of future generations to meet their own needs.

What does this mean in the context of Oxfordshire's Strategic Economic Plan ~~for Oxfordshire – Consultation Draft~~?

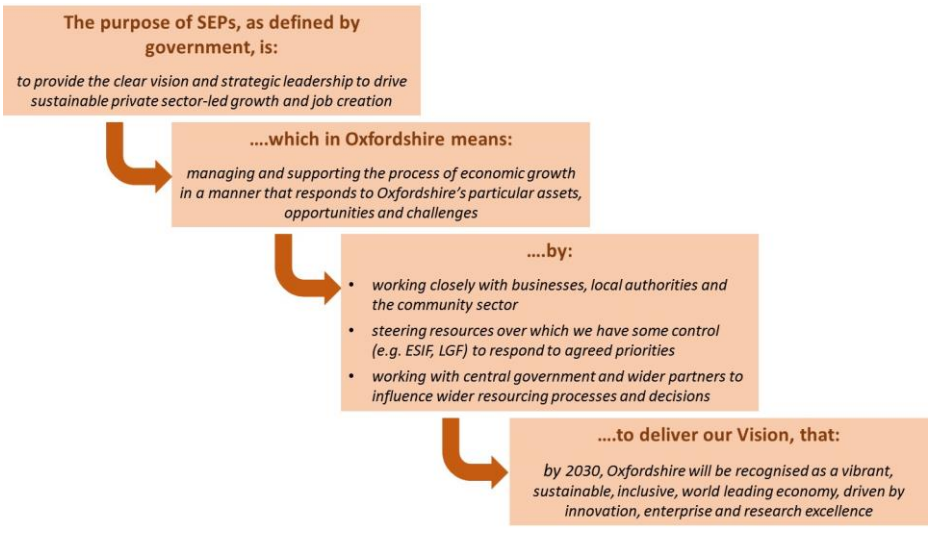
Oxfordshire LEP was established by the Government to support economic growth in Oxfordshire. Its focus, therefore, is on supporting economic growth which delivers sustainable and inclusive outcomes and creates a vibrant and world leading business environment. This type of growth will:

- 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, 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)



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A profile of Oxfordshire's economy today – and ~~our~~its assets, opportunities and challenges

~~*The economic headlines*~~

The economic headlines

Overall, Oxfordshire generates output to the value of about £20.5bn (data for 2014, in current prices, from ONS) from ~~around~~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;

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

~~Some 352~~In the year to March 2016, some 358,000 residents aged 16-64 ~~are~~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. ~~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 ~~at~~ 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 –also accounts for around 32,000 jobs (9.5%)[1].

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 Assessment[2]. 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). 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

[1] 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.

[2] 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.

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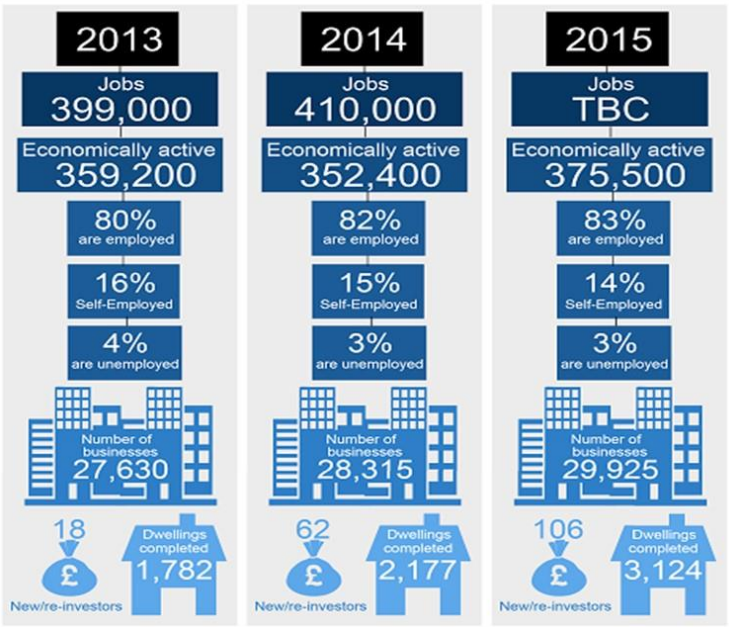
received a reported £1.4bn in investments - more than five times the previous year's total of £250m. Over 20 new Oxford technologies and ventures received a record £2.6m in proof-of-concept funding in 2014 alone. This bodes well for future growth.

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.

One reason for increased commuting into Oxfordshire is the high housing costs and associated issues of affordability[3]. It is therefore encouraging that housing completions have increased over the five years to 2015, compared with a national average of 15%[4]. However, completions remain well below the objectively assessed need: a total of 3,124 new homes were completed in the county in 2014/15, compared with a need averaging approximately 5,000 per year[5].

As at June 2016, some 2,635 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. Furthermore, the people claiming in work 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



Oxfordshire's wider assets for economic prosperity

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~~The spatial economy~~

[3] 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

[4] Sources: local authority annual monitoring reports for the Oxfordshire figure, DCLG for the national figure.

[5] 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.

Against this backdrop, Oxfordshire has a very distinctive spatial economy. The county approximates to a functional economic area. Most of Oxfordshire 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, "Oxford" accounts for just under a quarter of the county's population. It is home to about 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 (to the north and east); Witney in West Oxfordshire; Abingdon, Didcot, Grove and Wantage in South and Vale. These towns differ substantially from each other and some of them – notably Bicester, Didcot, Grove and Wantage – 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). Moreover, Blenheim Palace and its Estate is defined as a World Heritage Site, reflecting both its cultural and historical significance.

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Key facts about Oxfordshire

Employment rate: 78%
Oct. 2014 - Sept. 2015
England: 74%

Source: Anunual Population Survey

Total population (2014): 672,516

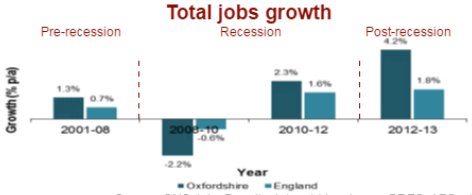
Of which....

...431,397 are working age

Total population and working-age population growth

Source: ONS Mid Year Population Estimates (2001-2014)

Total jobs growth



Source: ONS Jobs Density dataset (drawing on BRES, APS, etc.)

Total jobs (2013): 399,000

Source: ONS Jobs Density dataset (drawing on BRES, APS, etc.)

Absolute level of GVA (smoothed) per hour worked (2013)

		2010 - 2013
OxLEP £32.10	annual growth	1.8% p/a
GCGPLEP* £32.80		3.0% p/a
England £30.50		1.5% p/a

Absolute level of GVA (smoothed) per filled job (2013)

		2010 - 2013
OxLEP £50,400	annual growth	2.9% p/a
GCGPLEP* £52,397		2.5% p/a
England £48,918		2.0% p/a

*Greater Cambridge Greater Peterborough LEP

Source: ONS Subregional Productivity Tables (Tables A3 and B3)

Total GVA:

£20,501,000,000

per capita: £30,485
(2014 current prices)

Source: GVA for Local Enterprise Partnerships

Total housing completions

2010 - 2011	1,180
2011 - 2012	1,290
2012 - 2013	1,500
2013 - 2014	1,390
2014 - 2015	1,630

Source: GLG Live Tables (Table 253)

~~The area surrounding Oxford is Green Belt – a planning designation which is designed fundamentally to prevent urban sprawl 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 distinctive and beautiful, and which needs to be recognised, respected and conserved in these terms.**~~

~~*The economic importance of our built and natural environmental assets*~~

~~It is largely because of the outstanding quality of our natural and built environment – and the importance of both in relation to our economic well-being – that we led the development of both a **Strategic Environmental and Economic Investment Plan (SEEIP)** and a **Creative, Cultural Heritage and Tourism Investment Plan (CCHTIP)**.~~

~~These two documents distil a great deal of evidence and insight with regard to the economy of Oxfordshire.~~

~~In addition, we recognise fully the importance of climate change, and the need to effect a faster transition to a low carbon economy. Already, low carbon sectors account for about 7% of the economy.~~

~~**A further shift to a low carbon economy however requires broad innovation of the form that Oxfordshire ought to be uniquely well placed to advance**[1].~~

~~Our wide ranging **Innovation Strategy** – which has recently been completed in draft form – provides the third of our cross-cutting strategic statements which underpin this refreshed SEP.~~

~~The main provisions of all three are summarised below; more detailed synopses are available in Annex B.~~

~~*Oxfordshire's wider assets for economic prosperity*~~

~~Alongside~~ ~~Oxfordshire's cultural and environmental assets, the on-going significance of Oxfordshire's knowledge-based resources must also be emphasised.~~

Oxfordshire is home to some of the UK's principal resources for high quality, knowledge-based, economic growth~~. These include,~~ ~~*inter alia*~~:

- ~~The~~ **~~University of Oxford~~**~~, which~~ 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~~), and according to~~. The University of Oxford has had over 50 Nobel Prize winners, more than most countries, and total external research has increased every ~~league table~~year for the last 10 years, reaching £523m in 2014/15.
- ~~The~~ **Oxford Brookes University**~~, which~~ 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.

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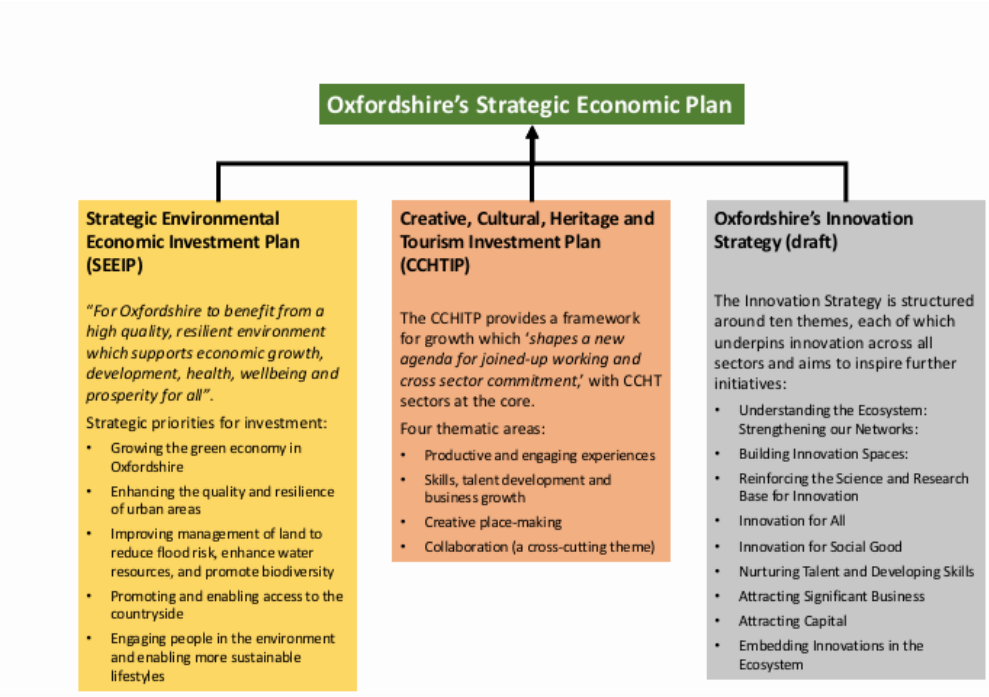
1 See *Oxfordshire's Low Carbon Economy* Report by the Environmental Change Institute and Low Carbon Oxford, October 2014

Figure 2: Oxfordshire's Strategic Economic Plan – and the three cross-cutting strategies which underpin it



- ~~A~~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.

- ~~A~~Oxfordshire has some **outstanding and fast-growing businesses with names that are ~~increasingly~~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.

- ~~the~~There is momentum linked to **Science Vale Oxford**, ~~and two~~**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, Milton Park, and Oxford Science Park).

- ~~an **enviable**~~ 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

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- 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 (~~in terms of~~ London) and a ~~major~~ global hub airport (Heathrow); and is an integral part of the UK's **Golden Triangle** (defined ~~around~~between Cambridge, London and Oxford~~)~~).

Figure 3: Oxfordshire's Strategic Economic Assets

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[6], 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.

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

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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).

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

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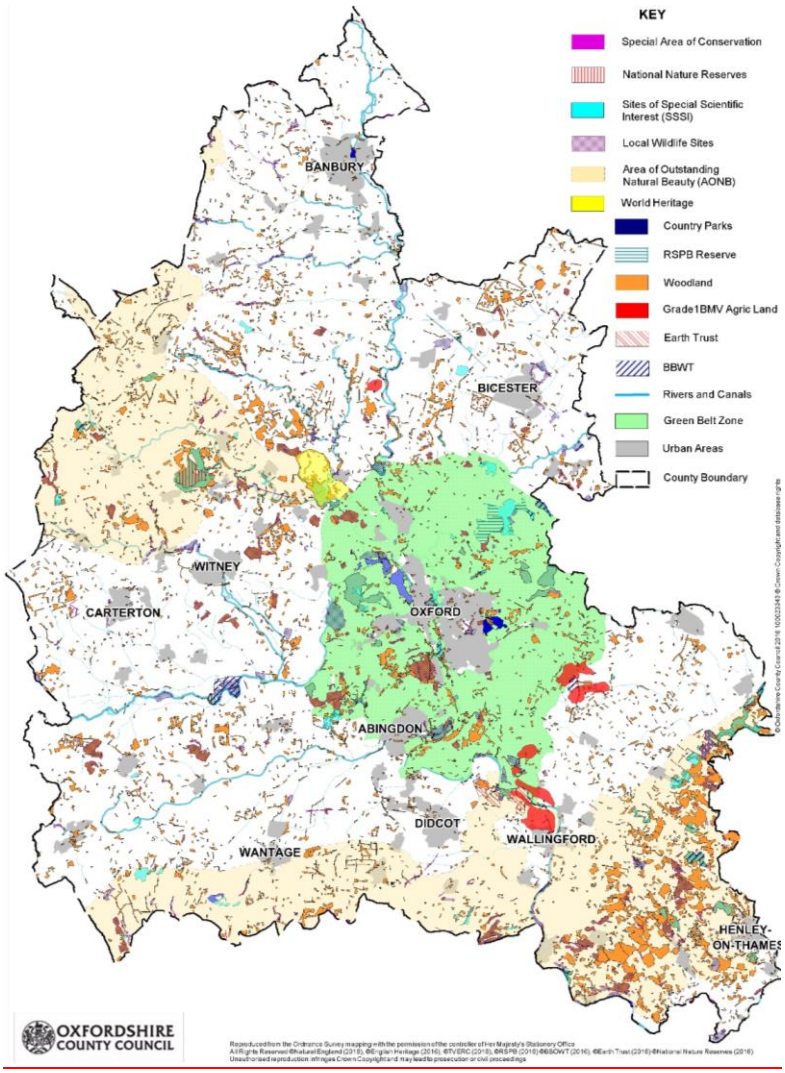
Figure 4: Oxfordshire's Strategic Environmental Assets



Economic Plan for 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. ~~Consultation Draft~~ 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 (to the north and east); Witney 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 some of them – notably Bicester, Didcot and Grove & Wantage – 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).

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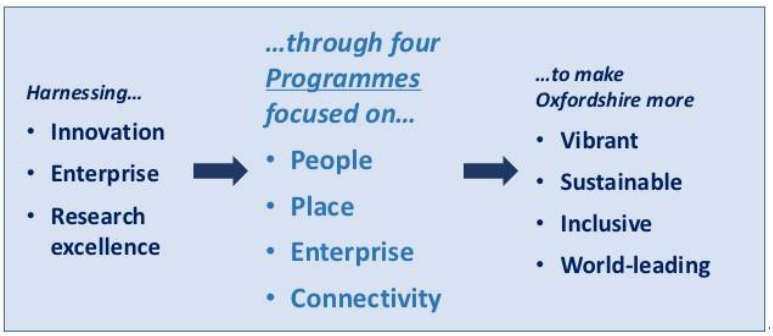
Blenheim Palace and its Estate, and the University quarter in Oxford, are World Heritage Sites, reflecting their cultural and historical significance.

The area surrounding Oxford is Green Belt – a planning designation which was established to control urban sprawl 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 county such as Oxfordshire it is inevitable that at times there may be conflicts~~Our Programmes~~

~~In order to advance the delivery of our Vision – and to build on the progress we have already made in pursuit of the Objectives set out in our SEP – we will continue to focus delivery around our **four main Programmes**.~~



~~Our four Programmes are:~~

- ~~**People** – delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive, employment and fulfilling jobs~~

- ~~**Place** – ensuring a strong link~~ **between** ~~jobs and housing growth, and providing both the quality~~**economic development, environment** ~~and choice of homes needed to support "good" growth whilst capitalising upon the exceptional quality of life, vibrant economy and dynamic urban and rural communities of our county~~

- ~~**Enterprise** – with an emphasis on innovation-led growth, underpinned by the strength of university and other research, business collaboration and supply chain potential; and also recognising the significant contribution made through social enterprises in Oxfordshire~~

- ~~**Connectivity** – allowing people, goods and services to move more freely, connect more easily; and providing the services, environment and facilities needed by a dynamic, growing and dispersed economy.~~

~~Cross-cutting~~ assets and ~~spatial dimensions~~

~~**We will ensure that the inter-relationships**~~the Green Belt. However, if development is planned and ~~**opportunities across these programme areas 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 and to complement activities under each of these programme areas.~~

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There is also a **cross-cutting spatial dimension** to the SEP. We will maintain the principal spatial focus on the Oxfordshire Knowledge Spine (see Figure 3) – from Bicester in the north through Oxford to Science Vale in the south – as the main location for housing and employment growth. This is reflected in the approved 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.

This spatial focus is not exclusive, and we will continue to encourage and support projects in other parts of the county which help implement the SEP. We will also ensure other areas are **delivered well** connected into the Knowledge Spine, to ensure the benefits of economic growth are accessible to all.

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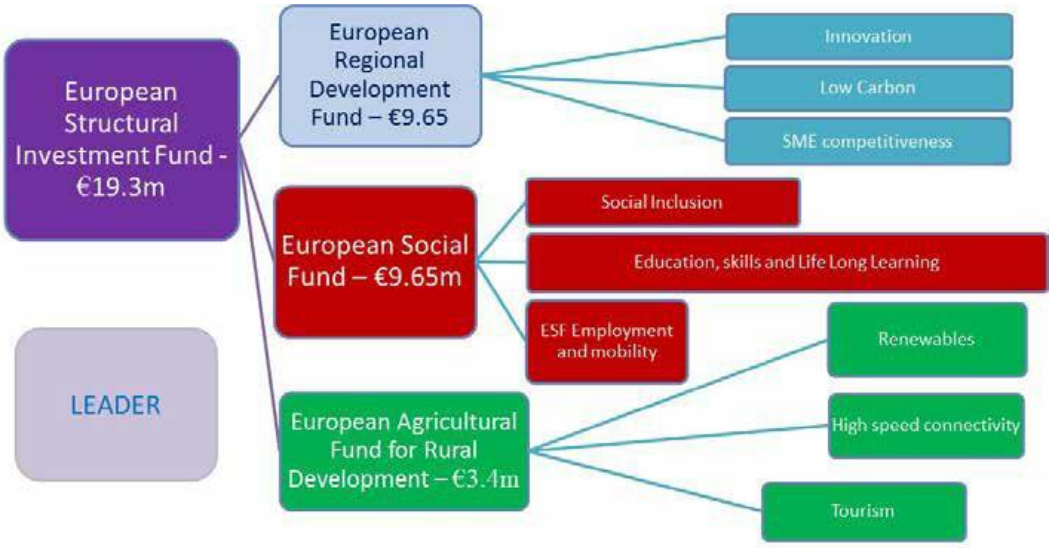
Figure 3: Map of Oxfordshire's Knowledge Spine

Map provided by kind permission of Oxfordshire County Council

Using, with adequate resources well

In order to **deliver our Programmes**, we will garner a wide range of – and if natural resources – including through a third bidding round for resources from the **Local Growth Fund**. Over the next four years, however, our €19.4million allocation from the **European Structural and Investment Funds (ESIF)** will be especially important (noting however that it is the second lowest across 39 LEPs). ESIF comprises funding from three main sources: European Regional Development Fund (ERDF), focused on small and medium sized enterprises; European Social Fund (ESIF), with a focus on social inclusion, workforce development and lifelong learning; and European Agricultural Fund for Rural Development (EAFRD). The main elements of it are summarised in the diagram below. The full ESIF strategy is available at www.oxfordshire.com/content/eu-strategy

Figure 4: Oxfordshire's European Structural and Investment Funds (ESIF) programme



The ESIF programmes compliment and align with the £1.55m Oxfordshire LEADER programme* (an EU fund focused on rural areas) and other LEADERS in the county for the Cotswolds, Chilterns and North Wessex Downs.

*www.oxfordshireleader.org.uk

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People

Headline assessment of strengths, weaknesses, opportunities and threats

- Highly qualified workforce
- Very attractive place to live and work – but the affordability of housing is a substantial challenge, particularly to those in low pay jobs
- Large student population, providing recruitment opportunities for local firms
- Rapidly ageing population with a declining working age labour force
- Pockets of social and economic exclusion, especially in Oxford

Current characteristics

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

Employers, however, are **struggling to recruit the people they need**[2] against a backdrop of (close to) full employment. Moreover, particularly for younger working age residents, Oxfordshire is very expensive – and for many, the excitement and opportunities in London are very attractive.

The **affordability of housing across** the county continues to be a major concern. The challenges are acute for younger people and those in less well paid jobs. They are also affecting Oxfordshire's ability to recruit and retain nurses and teachers – key professions in terms of the county's overall quality of life. A recent study of house prices to earnings ratios (by Oxford University's Professor Dorling[3] (February 2016) showed that in January 2015, the ratio of average house prices to incomes in Oxford was over 15, compared to 14 in London. According to Professor Dorling, the average cost of a house in Oxford is £426,720, well out stripping the average income of £26,500 of Oxford employees. 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, as house prices across Oxfordshire are 50% above the national average and 13% above average for the South East region. According to Rightmove, the average price of a home in Oxfordshire as a whole is £377,533.

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%). In part this reflects the affordability and availability of housing.

In addition, there are very challenging issues with regard to **social inclusion.** Their scale is not great overall – but in many respects, that makes the challenges harder (as people experiencing exclusion tend to be overlooked). There is a need for some excellent and creative responses to help more disadvantaged Oxfordshire residents move closer to the labour market.

2 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).
3 see www.dannydorling.org/?p=4476

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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.

Priorities to 2020

In delivering the SEP, particular priority will therefore be attached to:

- Understanding – and responding to – the aspirations and frustrations of young people as they seek to build their lives and their careers in Oxfordshire
- Improving schools' performance, particularly at A Level where the performance of Oxfordshire's state schools is below the national average
- Developing Science, Technology, Engineering and Maths (STEM) skills among Oxfordshire's young people
- Ensuring that skills provision is aligned more effectively with the needs of employers
- Persuading people of the genuine potential benefits (in people terms) linked to "good economic growth"
- Emphasising the importance of people as well as firms in terms of inward investment – Oxford has plenty of firms already that will grow fast if they can recruit and retain the right people, including through international recruitment.

In addition, the intention will be to continue to deliver the **Oxfordshire Skills Strategy** which is summarised in Box 1.

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Box 1: 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:

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

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Ongoing commitments to deliver our Programme

Through our ESF 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. The three year project will commence later in 2016[4].

OxLEP has 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 just under £1m.

In addition, OxLEP and the SFA have jointly issued a project call for an Oxfordshire Community Grants scheme with a value of just under £0.5m that will be focused on helping people within their communities to move closer to the labour market. This project**are appropriately valued – the outcome** **should** start delivering in the summer 2016.

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Community Employment Plans (CEPs) are also seen as an important means to ensure that local people can better access job opportunities arising from 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 CEP is already in place for the Westgate Shopping Centre redevelopment, and more are in the pipeline.

4 Note that further detail should be available by summer 2016

Box 2: Westgate Community Employment Plan

The overall mission statement for the Westgate Community Employment Plan is "Shaping the Future of Oxford for Good". Land Securities aim is to be recognised by local authorities and communities as the number one partner for the delivery of positive social and economic impact, and create a place that Oxfordshire residents feel proud of. The key objectives of the Westgate CEP 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 and End User phase. 750 outcomes have been agreed across the two CEP's over a period of approximately 4 years taking account the length of the build plus a sensible period of time post opening of Westgate Oxford to ensure optimum outcomes for the local community.

There have been a number of successes within the current Construction CEP as follows:

Sector Based Work Academies (SWBA)
50 people attended pre-employment training
11 people attended site work experience
3 people have been employed on the site as a result of attending SBWA

Employment opportunities
2 individuals employed on site – one of which is Daniel White a City of Oxford College student who is still on site working for Walter Forshaw as a result of the CEP and Laing O'Rourke's involvement with City of Oxford College.

Local employment
be net 18% of those employed on the site have Oxfordshire postcodes.

Local procurement
39.50% of procurement to date awarded from within local supply chain

Youth
- Significant attendance at local career events such as Career Fest etc.
- Land Securities and Laing O'Rouke have become lead partners supporting the future School of Construction and STEM Centre on the City of Oxford Campus at Blackbird Leys
- Laing O'Rouke is currently supporting UTC Oxfordshire with its Project Base Learning programme

Activities will continue throughout the lifetime of construction.

Each plan is measured and monitored as part of ongoing dialogue from monthly meetings with a variety of key external and internal stakeholders. All progress is shared regularly with Oxford City Council.

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How Innovative People will contribute to different elements of the Vision

Vibrancy	"Innovative people" will • define a vibrant economy and a thriving living and working environment • meet together, providing the catalyst for world changing ideas and innovation • embrace an international dimension (including but not restricted to students), adding dynamism and buzz and building further a **vibrant** Oxfordshire
Sustainability	"Innovative people" will • recognise that Oxfordshire's communities need to be sustainable with a balanced demography – Oxfordshire's young people are its future and they need to be able to live locally • invest in skills, particularly of the existing workforce and the future one, in a way that responds effectively to employers' needs and in turn enables enterprises to prosper • support programmes such as the 'Workplace Wellbeing' initiative, led by Unipart with participation by other major employers and the health authorities in the county, to improve productivity through improving employee health and wellbeing • respond constructively to shortages in Science, Technology, Engineering and Maths (STEM) skills, recognising that some international migration needs to be part of a sustainable response
Inclusivity	"Innovative people" will • effect improved education and training provision focused on excluded groups (particularly ESA claimants), recognising that this could bring 10,000 extra working age residents into employment (which would be helpful given labour shortages) • help effect transition to higher paid jobs for those who are struggling in Oxfordshire's housing market, particularly young people
World Leading	"Innovative people" will • capitalise on the fact that world leading scientists and engineers are attracted to Oxfordshire by the research facilities and leading firms, by the Oxford brand, and by the quality of the natural and built environment.

Place

Headline assessment of strengths, weaknesses, opportunities and threats

- 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 most of the market towns and villages
- Within the county, there are extensive areas of high **environmental** quality and sensitivity – parts of three AONBs in particular**gains.**
  - plus important cultural and heritage assets (and an important tourism, heritage and cultural sector as a consequence)
- Housing in Oxfordshire is among the most expensive in the country
- 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.
- Oxfordshire is facing significant resource constraints – water, power supply and grid capacity (e.g. to upload solar energy)
- Although countywide emissions of carbon dioxide fell by just over 8% from 2008 to 2013[5], if this trend continued, we would see emissions fall by 32% by 2030 (as compared to the public commitment to 50% reduction in the Oxfordshire 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.

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

Oxfordshire's **tourism, heritage and cultural sector** is an important and growing part of the economy, and depends on the quality of place.

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: the result is hard to fill vacancies in low income jobs; long distance commuting from lower cost areas, and therefore more congestion on key transport routes; and 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.

5 DECC UK local authority and regional carbon dioxide emissions national statistics.

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Priorities to 2020

The priorities in relation to place are to ensure the high quality of our built and rural environments is maintained, and to manage change in ways which produce better outcomes for local residents and businesses. We will therefore support the implementation of the priorities set out in our **Strategic Environmental and Economic Investment Plan (SEEIP)** and our **Creative, Cultural Heritage and Tourism (CCHT) Investment Plan**.

- New development can, and should, enhance the existing built environment, through excellent design and the use of high quality building materials. At the same time, the sustainability of the existing built environment must be improved.

In particular, priority will be attached to:

- supporting the delivery of new housing and business space which has been permitted by the planning system, for example through securing funding for access or infrastructure improvements
- supporting the commercialisation and application of clean and green technologies in Oxfordshire's places
- producing, with Oxfordshire's local authorities, a county wide design guide to improve the aesthetic design and sustainability of all new development
- ensuring that all new housing developments have broadband to home provided as standard
- supporting the design and delivery of potential innovation districts, including: Oxpens/Osney Mead, Headington/Old Road campus, Northern Gateway, Harwell Campus, Bicester Eco development, Begbroke, Culham.
- Encouraging employers to take more responsibility for ensuring their employees have access to affordable housing
- Supporting enterprise in market towns
- Supporting the development of a locally-informed energy masterplan for Oxfordshire to act as a business case for investment and grant support from Ofgem, etc.
- Providing continued support for the implementation of flood alleviation schemes
- Continuing to support the delivery of neighbourhood plans.

Ongoing commitments to deliver our Programme

Partners in Oxfordshire are very committed to the delivery of ambitious targets in relation to carbon emissions; we have a low carbon plan and we are also focusing significant ESIF monies (principally ERDF) to low carbon agendas.

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Oxford city Council has led on the delivery of '***Low Carbon Oxford: A Route Map to 2020***'. The Route Map is an action plan that sets out how the city of Oxford expects to meet its commitment to reduce carbon emissions by 40% by 2020. This target was established in the Council's sustainability strategy in 2011 and subsequently adopted by the Low Carbon Oxford partnerships' Pathfinder members as a common goal.

By setting out the actions that partners around the city have taken and intend to take to reduce carbon, the Route Map provides a rigorous underpinning of Low Carbon Oxford's efforts to facilitate members' actions and projects that deliver change. It provides an understanding of which actions have the greatest impact and the exercise was an opportunity to explore and plug any gaps in the plan.

From both a City Council and Low Carbon Oxford perspective the Route Map is a key step in progressing the transition to a low carbon economy. As the project moves forward there will be a need to look beyond the now standard solutions of energy efficiency and renewable generation. There will be a focus on operational transformation and the impacts of the supply chain. The Route Map provides the baseline from which leaders in sustainability can begin to shift from delivery roles into an increasing function as a facilitator of change, such as working with business operations to reduce the impact of on-sire deliveries.

Box 3: An example of high quality place-making: North West Bicester Eco Development

The North West Bicester eco-development, led by A2Dominion, is the first in the UK to adhere to the Government's Planning Policy Statement (PPS1) for Eco Towns. It will eventually provide up to 6,000 true zero-carbon homes and 6,000 jobs on a 1,000 acre site on the north-west edge of the town. 40 percent of the area will be green space and residents will be encouraged to live and commute as sustainably as possible. A 51-acre 'Exemplar' development of 393 houses, 'Elmsbrook' is currently under construction with first residents occupying in 2016.

North West Bicester is designed to be a sustainable, vibrant community of people from all backgrounds, with designated community space and 30 percent 'affordable homes', which will be retained long term by A2Dominion, the main developer, for rental. Planned development will incorporate schools, local centres, sports and recreational provision, a health centre and commercial / business space (including an eco business centre to encourage the formation and growth of businesses focusing on environmental goods and services). The 40 percent green space will include a community farm and orchard, country park and woodland burial ground, while existing hedgerows and natural habitats will be incorporated into the design.

The homes are being built to a high level of sustainability (Code Level 5), using a timber frame design and triple glazing for highly insulated and draught proof homes. They are being built to accommodate future climate change (warm in winter and cool in summer) up to a peak increase in temperature of 10 degrees Celsius by 2050.

Energy will be provided by a combination of solar panels on every rooftop, and a Combined Heat and Power district heating system. This will provide heating and hot water to every home, eliminating the need for a boiler in every house and keeping heating bills lower than average.

The whole site will be connected into the rest of Bicester (including to the town centre and stations) with cycle and pedestrian routes, and all homes will be within 400 metres of a bus stop. Each property will also have access to an electric car charging point and the site will have an 'electric car club,' in addition to subsidised electric cars for community champions.

The aim is to provide an environment and ethos which promotes sustainable living and travel. It demonstrates that new developments can be both more attractive and more sustainable than existing ones, with appropriate design and development.

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Box 4: Culham Smart Community: people, place, enterprise and connectivity

"Culham Smart Community" recognises that people will use digital tools in new and exciting ways for mobility, health, education and entertainment.

Oxfordshire is at the heart of the action. RACE (funded by the Oxford & Oxfordshire City Deal) is working with Oxford University's Mobile Robotics Group to conduct long term testing of autonomous vehicles. This links with plans for 'smart' housing integrated with digital road and rail transport solutions and creates opportunities to explore the practicalities of digital health and drone deliveries, as well as the next generation of ways to communicate taking into account concerns around privacy and security.

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How Innovative Place will contribute to different elements of the Vision

Vibrancy	"Innovative place" will • emphasise the quality of physical development in order to create more vibrant places • support wealth generation so that it is possible to invest in, and achieve quality in development processes • emphasise the importance of places being "balanced" and vibrant communities: they must be home to people of different ages, and provide job opportunities as well as homes • emphasise the importance of market towns as vibrant urban hubs • recognise the distinctive role and contribution of Oxfordshire's rural areas and the imperative that these too should be vibrant in economic terms • recognise the role of employers in building and sustaining place economies
Sustainability	"Innovative place" will • insist on the importance of "good" new development which is more sustainable than many existing settlements, and there is much good practice on which to build – e.g. NW Bicester is a national exemplar of sustainable development; and Graven Hill Bicester is a national exemplar supporting self build housing • support Neighbourhood Plans • support programmes to improve the energy efficiency of the existing built environment • define an agenda that plans simultaneously for both jobs and housing growth – and puts in place the infrastructure required for both
Inclusivity	"Innovative place" will • evolve approaches to social/affordable housing, consistent with the overall Vision, which provide better access to housing for low income and disadvantaged groups • ensure that good design of urban places leads to higher levels of inclusion and fewer opportunities for crime and anti-social behaviour
World Leading	"Innovative place" will • ensure that Oxfordshire continues to provide a quality of life that can attract the "brightest and best" • encourage research and commercialisation among businesses that are pioneering world leading clean and green technologies, and the local application of these new technologies in Oxfordshire.

Enterprise

Headline assessment of strengths, weaknesses, opportunities and threats

- Outstanding strengths and opportunities in research and its commercialisation
- Large and diverse high tech economy, including many firms with exceptional growth potential
- Particular 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.
- But relatively low levels of new business 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 or possible Brexit

Current characteristics

Oxfordshire is remarkable for the sheer **range of scientific disciplines and business sectors** in which there is real strength and depth (Innovation Strategy draft, Section 3.1).

It has some outstanding success stories in business formation and growth – particularly in science and technology based sectors. It 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.

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 have 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.

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Priorities to 2020

In delivering the SEP, particular priority will therefore be attached to:

- improving productivity across all sectors, to 'create more from less' by encouraging businesses to adopt energy efficiency approaches.
- celebrating Oxfordshire's business successes across all sectors – establish role models for the next generation
- maintaining focus on improving support for commercialisation and scale up, such as RACE at Culham, the Bioescalator and the Centre for Applied Superconductivity (the last a public/private partnership)
- ensuring there is also support for enterprise not linked to the research infrastructure – for example, through facilitating the creation of more flexible start up and small business space
- linking firms to networks and support, both within and across sectors, for example by strengthening the Network Navigators initiative – also under "Connectivity"
- improving national and international marketing of Oxfordshire and consistent messaging about quality growth – to benefit local businesses and attract public and private sector investment into the county
- focusing on export promotion among existing businesses
- encouraging employers to provide flexible jobs that can work for those on the margins of the labour market.

Ongoing commitments to deliver our Programme

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

Various Oxfordshire ESIF monies have been allocated to deliver against the ambitions of our Enterprise Programme. These include priorities linked to 'SME Competitiveness' and 'Research and Innovation'[6].

In addition, the OBS delivery team continues to apply for appropriate funding for the long term sustainability of the business support service in Oxfordshire.

6 Further information will be available by summer 2016

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How Innovative Enterprise will contribute to different elements of the Vision

Vibrancy	"Innovative Enterprise" will: • encourage entrepreneurship, new firm formation and growth • expose Oxfordshire businesses to international markets and opportunities • encourage business to business connections, networking and clustering • explore and animate potential links between businesses in different – but potentially related – sectors • actively encourage and support processes of innovation • encourage enterprises to reward people well, and motivate and excite
Sustainability	"Innovative Enterprise" will: • actively support and promote businesses in Oxfordshire whose products or services will help create a more sustainable environment – e.g. through energy efficiency, use of renewables and low/no carbon energy, more efficient use of infrastructure such as road space, etc. • encourage enterprises to use their own resources better, thereby increasing productivity
Inclusivity	"Innovative Enterprise" will: • recognise and encourage the success of social enterprise in Oxfordshire • encourage more businesses to consider working arrangements that might work for those on the edge of the labour market
World Leading	"Innovative Enterprise" will: • celebrate Oxfordshire enterprises which are commercialising world leading technologies • ensure that more small businesses can grow to become world leading • help to lubricate the interfaces between the University of Oxford, Oxford Brookes, the big research establishments and the process of enterprise in Oxfordshire and beyond • support growth of those sectors in Oxfordshire which have world leading expertise and the capabilities to generate high value economic growth (see Box 11)

Figure 5: Oxfordshire's key sector propositions

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	• Already 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 the 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

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Creating the Environment for Growth: Strategic Economic Plan for Oxfordshire – Consultation Draft | 31

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Connectivity

Headline assessment of strengths, weaknesses, opportunities and threats

- significant improvement in rail, with 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
- congestion on Oxfordshire's roads remains a significant issue, despite targeted investment in the strategic network
- bus travel is amongst the country's most modern and innovative (e.g. in terms of payment), but still suffers from congestion and a variable image
- Active & Healthy Travel is a growing area of importance and need for investment, but progress has been patchy
- The capacity of the electricity grid in Oxfordshire is seriously constrained – particularly for renewables connections, but also for supply connections.
- There are still areas of Oxfordshire without access to broadband and there are still issues about the affordability of the final link into homes and workplaces
- Oxfordshire has a very large number of business networks, but they are mainly sector specific and opportunities for cross over benefits between sectors, technologies and businesses may be missed.

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, within Oxfordshire, both the road and, to a lesser extent, rail networks are **congested**, and further improvements to increase capacity are needed.

Virtual connectivity within Oxfordshire is good. The business community is well networked, although the existing networks are quite fragmented and are mainly sector focused. Access to broadband across the county has improved but further improvements are needed to ensure all homes and businesses can benefit from high capacity telecommunications.

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"*.

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Priorities to 2020

In delivering the SEP, particular priority will therefore be attached to:

- ensuring transport investment programmes are: (a) focused on overcoming current capacity bottlenecks, (b) linked to the scale and location of planned housing and employment growth, and (c) supporting the implementation of Oxfordshire's Science Transit Strategy
- minimising the short term disruption to businesses during the construction phase of transport improvement programmes
- completing countywide broadband coverage
- continuing the Network Navigators initiative and strengthening network coordination across sectors
- supporting the work of the National Infrastructure Commission in relation to east-west connectivity through the Cambridge – Milton Keynes – Oxford corridor
- recognising the importance of Corridors across Oxfordshire and into the "heart of England" (which also includes Northamptonshire and Buckinghamshire).

Ongoing commitments to deliver our Programme

OxLEP – and its partners – is very committed to the delivery of the Connectivity Programme, including transport improvements to address constraints to growth and improve the quality of life. We are also devoting a significant share of our European Agricultural Fund for Rural Development (EAFRD) (part of ESIF) programme to addressing "white areas" in relation to superfast broadband.

Oxfordshire has secured and already started to deliver circa £150 million of transport infrastructure to 2020. This has been funded through City Deal, Local Pinch Point, Cycle City Ambitions, Local Growth Fund and Local Sustainable Transport Fund.

Through a clear strategy in the form of the SEP and the updated LTP4 it has allowed the county to target bids into multiple funding sources to deliver infrastructure for all modes to support growth across the county.

The county through new collaborative groups such as Smart Oxford and Mobility Oxford, (mobOx) has also been successful in funding a number of innovative projects via Innovate UK or Horizon 2020 European funding, in collaboration with Universities and the private sector, or via targeted funding such as OLEV funding to help deliver innovative EV charging infrastructure to support the uptake of EV in Oxford as well as new alternative fuels such as Hydrogen Fuel Cells.

Increasing the strength of collaborative working and supporting innovative projects in Oxfordshire will help support development of new Oxfordshire companies and attract inward investment while also supporting efficient use of connectivity infrastructure and improving the experience for residents and visitors to Oxfordshire.

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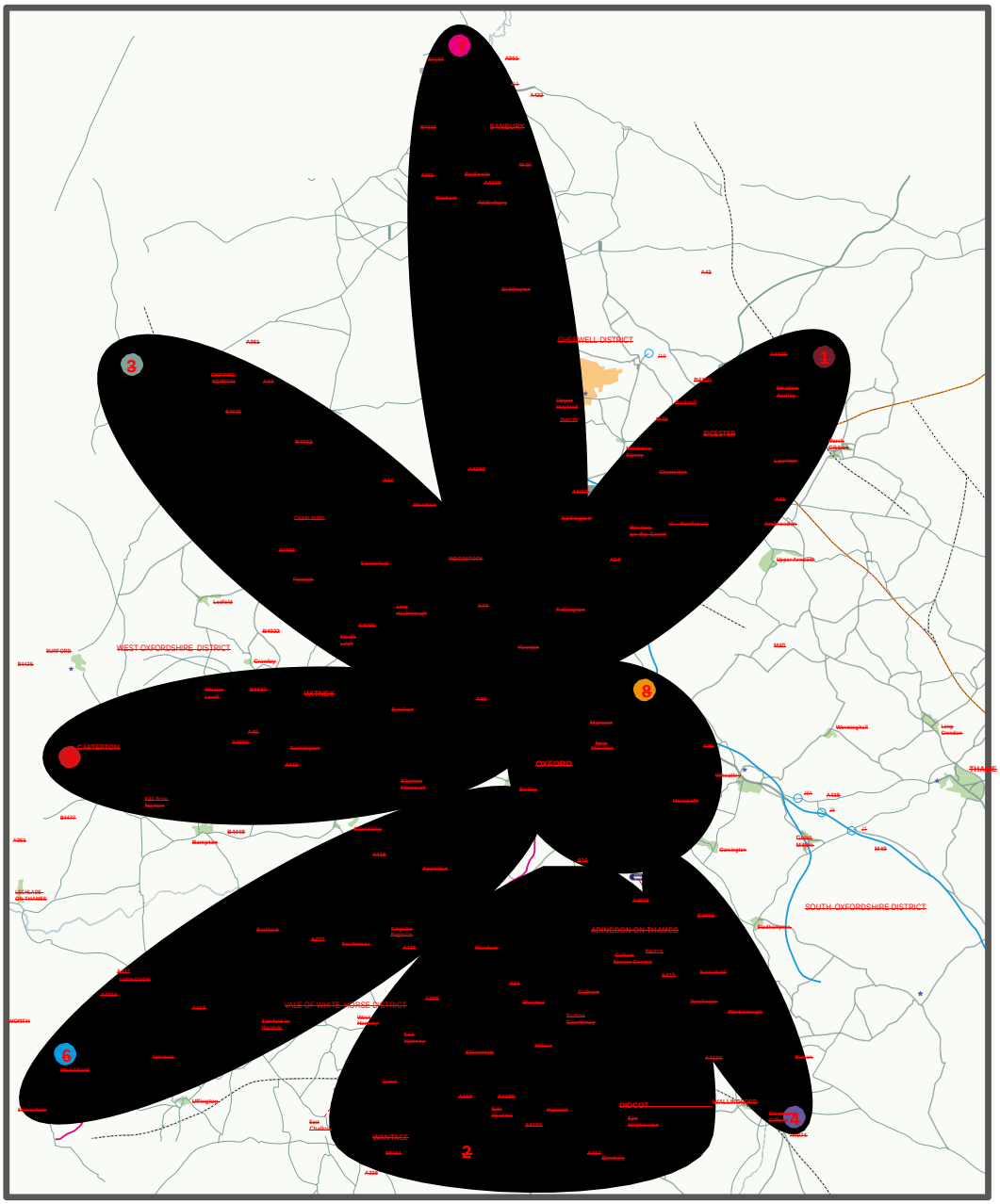


The plan illustrates Oxfordshire's committed main housing and employment growth, and the transport infrastructure proposals proposed to support that growth, on Oxfordshire's eight main corridors/areas. For each of these a separate, plan which shows more detailed information is being finalised. It is part of more clearly demonstrating our approach, which based on spatial planning and infrastructure being considered together to best support Oxfordshire's economic development.

How Innovative Connectivity will contribute to different elements of the Vision

Vibrancy	"Innovative Connectivity" will: • accelerate the local application of technologies developed in Oxfordshire which could help link vibrant places, people and enterprises (e.g. autonomous vehicles) • build strong business networks within and between sectors which add to economic vibrancy
Sustainability	"Innovative Connectivity" will: • major on sustainable transport solutions consistent with the Oxfordshire community strategy's 'Oxford 2030' commitment to reduce its territorial GHG emissions by 50% by the year 2030 (compared to 2008) • promote improved integration and efficiency of public transport services, particularly between areas of housing and employment growth • actively encourage cycling and walking, and "design in" both as part of development processes
Inclusivity	"Innovative Connectivity" will: • seek to improve access to job opportunities for low income and excluded groups by improving access to transport and telecoms • take action to overcome "travel to learn" challenges facing younger people in parts of Oxfordshire • work towards 100% broadband coverage in Oxfordshire
World Leading	"Innovative Connectivity" will: • actively encourage the development and local application of world leading technologies to enhance connectivity such as autonomous vehicles

Moving forward in delivery

In delivering the refreshed SEP, OxLEP will work through clear governance and management arrangements, building on the substantial progress that has been made over the last two years.

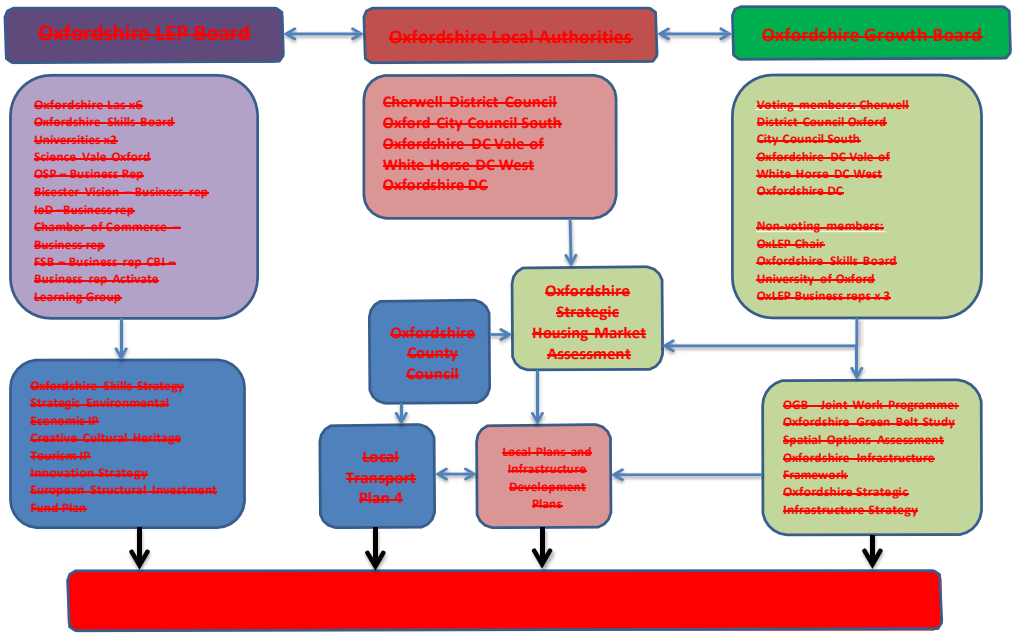
1: Wider governance arrangements

OxLEP will work closely with its 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 authority, will continue to have particular responsibility for key elements of the transport 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 a Joint Work Programme.

Figure 6: Oxfordshire LEP, Growth Board and Local Authority Relationships and Responsibilities



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2: OxLEP's wider responsibilities

Within this overall context, OxLEP – with its Board drawn from the business sector, the universities, local authority leaders and the voluntary sector – has overall responsibility for the delivery of the SEP.

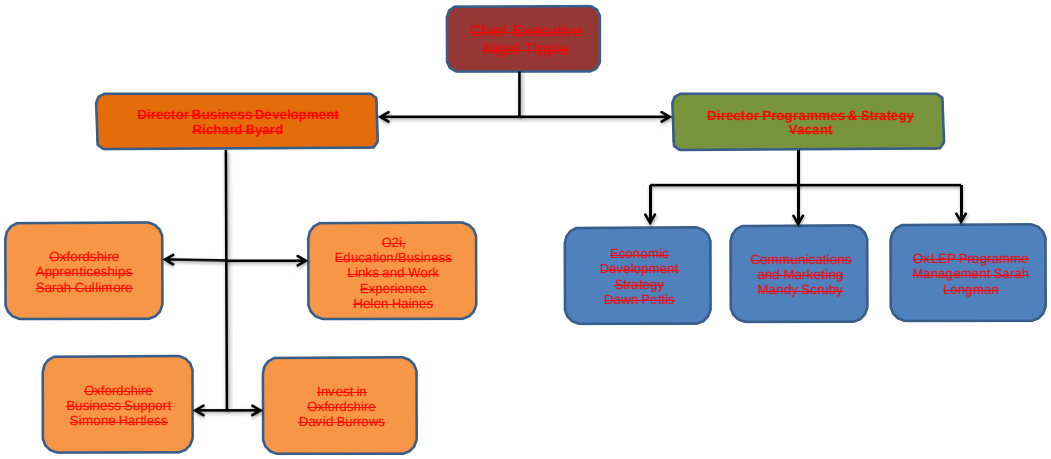
It has developed a series of strategies which are "daughter documents" to the SEP. These include strategies for skills; environment and the economy; culture, heritage and tourism; and innovation. In addition, it has led on the development of a series of sector propositions which will be used, particularly,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

OxLEP has responsibility for the delivery of a series of programmes. These include successive Growth Deals which have been (and are) very significant for Oxfordshire. It has also developed a plan for the delivery of the €19.4m European Structural and Investment Funds for Oxfordshire (see page 13).

3: Delivery team within the LEP

Within the LEP, the key officers within the wider delivery team are introduced within Figure 7. 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).

Figure 7: LEP Executive Team



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The LEP will continue to operate through its constituent parts/brands in the delivery of key SEP programmes.

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These include:

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

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Annex A:

Progress in delivering our Strategic Economic Plan

Economic Plan

Our original SEP included a series of Objectives, structured under each of 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. 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[7]. 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 and Investment Funds (ESF, ERDF, 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

Source	Amount secured	Leverage	Total investment	Expected outputs
City Deal (January 2014)	£55.5m	£1,216m	£1,271.5m	18,000 jobs, 7,500 homes, by 2021
Growth Deal 1 (January 2015)	£108.5m	£100m	£208.5m	6,000 jobs, 4,000 homes, by 2021
Growth Deal 2 (January 2015)	£9.9m	£593.54m	£603.44m	
Total	**£173.9**	**£1,909.54**	**£2,083.44**	

Table 2: European Structural Investment Funds[8]

Source	Amount allocated	Expected outputs
European Regional Development Fund	€9.9m	754 business supported
European Social Fund	€9.4	1,000 people helped into training and work
European Agricultural Fund for Rural Development	€2.8	TBC – discussions with Defra on-going
Total	**€22.1m**	

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 draft **Innovation Strategy** and the **Oxfordshire Skills Strategy**. The main provisions of all four are summarised below; more detailed synopses are available in Annex B.

[7] More detail is available in OxLEP's Progress Report, 2011-2015

[8] The Chancellor Phillip Hammond has announced that the Treasury will guarantee government funding for projects backed by ESIF which are signed before the Autumn Statement. The Treasury will assess whether other projects that are signed after the Autumn Statement should also get a guarantee. Some of Oxfordshire's ERDF bids are at assessment stage and we are confident that we will reach contract stage by the Autumn Statement. Other ERDF funding project calls have yet to be issued and we await further guidance on these.

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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
Creative, 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 ~~However, we are~~ 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 ~~good progress[7].~~ 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).

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 ~~continuing to foster~~promoting greater collaboration between schools and local businesses, and helping to ~~help~~ inspire our young people and make them aware of the employment and career opportunities within Oxfordshire.

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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. ~~This includes~~ These include some with outstanding credentials for sustainability ~~credentials such as~~ (e.g. **North West Bicester**~~,~~ **and the newly designated Didcot Garden Town**) and innovation (e.g. **Graven Hill**), and which ~~is~~are also providing a focus for both housing and jobs growth.

~~In addition, various of the Local Plans are moving through the **plan-making process**. Some (e.g. Cherwell) have been adopted although others are still being developed.~~

The District Local Plans are all moving through the plan making process. The Cherwell Local Plan has already been adopted and Oxford City Council has just embarked on a review of its Local Plan. Other District Plans are all in advanced stages of development. This has helped accelerate **housing delivery**, which has increased by 74% 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, produced by all the local authorities working together), 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: data from CLG (for 2013) suggest that the ratio of median house prices to earnings is 8.66 across Oxfordshire (compared to 6.72 across England as a whole)[9].

In relation to Enterprise…

~~We~~**More jobs have been created ~~jobs~~ within Oxfordshire ~~more quickly than we had planned.~~than were anticipated through the forecasts that informed the Strategic Housing Market Assessment.** This process has been bolstered by macro-economic conditions, but ~~we can also point to impacts starting to emerge through~~ there has also been an impact from some ~~major projects~~ 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.

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

~~7 More detail is available in OxLEP's Progress Report, 2011-2015~~

[99] Data sourced from CLG Live Table 577

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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.

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; and also enhancements to the **coverage of superfast broadband** county-wide. Around 80,000 premises across Oxfordshire now have access to faster fibre 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[10].

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 ~~potentially "disruptive"~~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.

~~Table 1:~~ Table 3: Oxfordshire's City Deal – including projects started by 2016
~~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:~~

[10] http://www.betterbroadbandoxfordshire.org.uk/cms/content/track-budget-and-time

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...good progress appears to be being made

...some, or mixed, progress – but there is more to do

...little or no progress has been made

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
Objective from the Strategic Economic Plan, March 2014	**Evidence of progress by April 2016**	
	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
People		
Increase the working age population qualified to level 2 and above to 90%	***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	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.£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
Ensure our further education capital stock meets the needs of 21st century learners and employers	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	£6.1m	In response to identified need, both

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County Council.		~~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~~£28.2m
~~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~~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, including 800 houses, of which 300 are additional to current plans, and up to 8,000 new jobs. Delivered by Oxfordshire County Council.	£7.3m	~~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~~

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		~~the correspondi ng 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~~£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 County Council.	£1.5m	£1.5m

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~~40 Creating the Environment for Growth: Strategic Economic Plan for Oxfordshire – Consultation Draft~~

Table 4: Growth Deal funding secured for projects started by 2016

~~Objective from the Strategic Economic Plan, March 2014~~	~~Evidence of progress by April 2016~~

~~Increase the amount of Skills Funding Agency funding that supports our STEM sectors by 15% to better reflect our economic profile~~Project	Growth Deal funding	~~SFA financial data no longer allows the ability to scrutinise funding to subject areas only to~~

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~~Deliver 1,150 more apprenticeships for young people with a focus on our priority growth sectors~~		~~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 favorably with a decrease of 2.5% across the South East region~~	
~~Retain our graduate talent~~***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	~~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 belo~~

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- ~~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 mobili*~~

~~*ty and produ ctivity* Foresi ght report publis hed by Gover nment Office for Scienc e, March 2016)~~

- ~~In gene ral, a high prop ortio n of grad uate s empl oyed in the sout h east are eithe r thos e retur ning to the regio n (follo wing stud y~~

		~~else where) or those who studied locally (source: *ibid*)~~£6.5m
~~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~~***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	~~• Some evidence of progress, particularly in major new developments like NW Bicester and Graven Hill~~£7.8m
~~**Place**~~		
~~Provide between 93,560 and 106,560 new homes by 2031~~***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	~~• 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~~

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			has been agreed by the local authorities (informed by the SHMA)£23m
Accelerate the delivery of new homes		• As above	
Provide accessible housing that is affordable for the people who work in Oxfordshire***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	• 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£5.9m	
Deliver flagship gateway developments and projects that stimulate growth***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	• Progress is being made with regard to the delivery of some flagship projects such as Oxford Northern Gateway, North West Bicester and Harwell Campus£452.5m	
Deliver the Oxford Flood Risk Management	£3.5m	•	

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~~Strategy~~***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.		~~Preferred option to be published in June 2016, Outline Business Case to be submitted to the Treasury August 2016~~£150m
~~Ensure new housing makes innovative use of blue and green infrastructure~~***Activate Care Suite*** – to improve adult social care and health. Delivered by Activate Learning.	£0.4m	~~Delivery is on-going~~£0.6m

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Our Vision

By 2030, Oxfordshire will be recognised 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 ERC 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
- **Enterprise** is another defining feature of Oxfordshire. Within the county, there are around 30,000 enterprises (or 35,000 local units). These range from major companies – like BMW and British Gas at Cowley, Siemens and Polartec at Eynsham/Woodstock, RM and Oxford Instruments, and major publishing houses (like Oxford University Press (OUP) and Blackwell UK) – 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 (e.g. Sophos, Adaptimmune and Immunocore) 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)

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- **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.

Our Programmes

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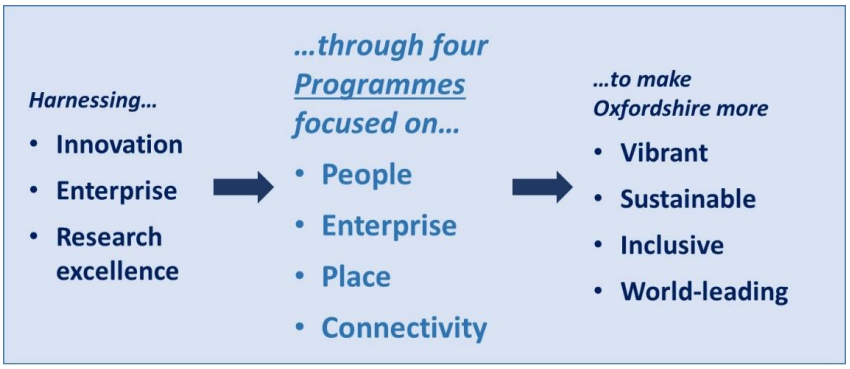
In order to realise our Vision, our Plan is structured around priorities which define **four Programmes**.



These four Programmes are:

- **People** – delivering and attracting specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive, employment and fulfilling jobs
- **Place** – ensuring Oxfordshire's places provide a sustainable mix of jobs, homes, social, community and recreational facilities, and a high quality built and rural environment
- **Enterprise** – placing an emphasis on innovation-led growth, underpinned by the strength of university and other world leading research, business collaboration and supply chain potential; and recognising the importance of supporting enterprises in many sectors of Oxfordshire's economy
- **Connectivity** – enabling people, goods, services and information to move more freely, by improving physical and digital connectivity supporting a fast-moving, 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 (see Box 2), 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.

The scale of growth envisaged

The SEP is based on the scale of growth set out in each of the District's adopted and emerging Local Plans, which for Oxfordshire involves an additional 88,000 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.

The SEP supports delivery of the scale of growth envisaged in the District Local Plans, but it does not itself add to those plans (see Annex C for a full explanation of the relationship

between the SEP and Local Plans). 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

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).

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[11] 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.

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

[11] 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).

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Priorities to 2020

In delivering the SEP, particular priority will be attached to:

Education and skills

- ensuring that skills provision is aligned more effectively with the needs of employers
- understanding – and responding 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
- increasing STEM skills among Oxfordshire's young people
- increasing the number of apprenticeship opportunities

Reducing exclusion

- addressing 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

- emphasising 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
- ensuring that the specialist skills of those military personnel in Oxfordshire who choose to remain in the county when they leave service life are used as far as possible in the local economy

Attitudes to growth

- demonstrating the genuine potential benefits of "good economic growth", defined as growth which is sustainable in economic, social and environmental terms (to be determined through Local Plans).

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 and is currently being refreshed.

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[12]. The project will help 300 Oxfordshire residents to seek training and work opportunities.

With the Big Lottery Fund, OxLEP has 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 just under £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 January 2017.

In addition, OxLEP and the Skills Funding Agency (SFA) have jointly issued a project call for an Oxfordshire Community Grants scheme with a value of just under £0.5m that will be focused on helping around 250 people within their communities to move closer to the labour market. This will start delivering in January 2017. Grants will be available throughout the county and community groups and other eligible organisations will be able to bid for grants of between £5,000 and £50,000.

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 Box 2 for an example), and more are in

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

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the pipeline. The LEP will support local authorities to include such proposals as part of their local plan policies and supporting text.

The LEP will continue to support the Oxfordshire Apprenticeships programme which aims to increase the number of apprentices in Oxfordshire through wide-ranging engagement with Oxfordshire schools, advertising campaigns, 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.

The LEP 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, OxLEP 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.

Box 2: 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 Westgate CEP 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 and End User phase. 750 outcomes have been agreed across the two CEPs, taking account of the length of the build plus a sensible period of time post opening of Westgate Oxford to ensure optimum outcomes for the local community.

There have been a number of successes within the current Construction CEP:

- 50 people attended pre-employment training, 11 people attended site work experience, and 3 people have been employed on the site
- 2 individuals employed as a result of the CEP and Laing O'Rourke's involvement with City of Oxford College.
- 18% of those employed on the site have Oxfordshire postcodes
- 39.50% of procurement to date awarded from within the local supply chain
- significant attendance at local career events such as Career Fest, etc.
- Land Securities and Laing O'Rouke have become lead partners supporting the future School of Construction and Science Technology Engineering and Maths (STEM) Centre on the City of Oxford Campus at Blackbird Leys
- Laing O'Rouke is currently supporting University Technical College Oxfordshire with its Project Base Learning programme.

Each CEP is measured and monitored as part of ongoing dialogue through monthly meetings with a variety of key external and internal stakeholders. All progress is shared regularly with Oxford City Council.

Box 3: Apprenticeship Programme

Oxfordshire Apprenticeship is a brand currently funded out of Oxfordshire's City Deal with an aim to promote and increase Apprenticeship opportunities within Oxfordshire. The three-year project started in April 2014 with targets to increase Apprenticeship starts for young people by 525 and to raise awareness of Apprenticeships amongst 1,850 employers.

Activities delivered include:

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- Developing a website (www.oxfordshireapprenticeships.co.uk) with information aimed at young people, parents and employers on Apprenticeships, case studies of local Apprentices and employers, and a local vacancy search function. The website gets around 2,500 hits per month.
- Developing and training a network of 30 Apprenticeship Ambassadors who support events to share their experiences, including appearing on local radio, and attending schools and employer events.
- Delivery of various PR campaigns including social media (over 2,900 Twitter followers and over 1,000 likes on Facebook), bus advertising, digital marketing and radio.
- Supporting school events including careers events, talks to parents and young people, and delivery of workshops.
- Delivering of 'making sense of Apprenticeship' events, drop in surgeries aimed at SMEs, attendance at employer networks to promote Apprenticeships and one to one support for employers thinking about taking on an Apprentice for the first time.
- Procurement of 8 projects with partners.
- Sponsorship of the Apprenticeship of the year award category at the Cherwell Business Awards and Oxfordshire Business awards.

Place

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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)

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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.

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. A recent study of house prices to earnings ratios (by Oxford University's Professor Dorling (February 2016)) showed that in January 2015, the ratio of average house prices to incomes in Oxford was over 15, compared to 14 in London. According to Professor Dorling, the average cost of a house in Oxford is £426,720, well out-stripping the average income of £26,500 of Oxford employees. 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 is even higher than in Oxford, and house prices across the county are 50% above the national average and 13% above average for the South East region. According to Rightmove, the average price of a home in Oxfordshire as a whole is £377,533.

The result is hard to fill vacancies in low income jobs; long distance commuting from lower cost areas, and therefore more congestion on key transport routes; and 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.

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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 SEEIP; support for the development plan system; and dealing with infrastructure constraints.

Place-making

- working 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 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. An analysis of the natural resources required to support these plans is also required
- supporting 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 restrained unless there are (radical) changes in housing policy at a national level
- supporting 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)
- ensuring 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.

Supporting implementation of the SEEIP

We will support the implementation of the **Strategic Environmental and Economic Investment Plan** (SEEIP – see Annex B for a fuller summary), 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.

Support for the development plan system

- supporting the development of growth plans which fully consider the available and potential capacity of infrastructure in the broadest sense
- supporting the delivery of new housing and employment space which has been allocated for development in approved Local Plans, for example through securing funding for access or infrastructure improvements. This includes support for strategic allocations which may result from Oxford City's unmet housing need, which may also result in significant economic development opportunities
- communicating the priorities of the SEP to local planning authorities in their preparation of local plans and to local organisations in the preparation of neighbourhood plans.

Dealing with infrastructure constraints

- supporting the preparation of an Oxfordshire Infrastructure Strategy by the Oxfordshire authorities 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
- ensuring that all homes and businesses have access to resilient broadband with at least 24MG download capacity, and to a good mobile phone signal.
- supporting the utilities study, commissioned by the Growth Board to map utilities capacity against Local Plan ambitions countywide
- supporting the preparation of a locally-informed energy strategy for Oxfordshire to act as a business case for investment and grant support from Ofgem, etc.
- providing continued support for the implementation of flood alleviation schemes.

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Actions to deliver our Programme

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

OxLEP acknowledges 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.

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 HCA to develop and support a housing investment strategy and consolidated funding allocation 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 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.

OxLEP is also committed to supporting attractive, sustainable and resilient places (including Garden Towns at Bicester and Didcot). Major actions agreed within the SEEIP include the development of a Sustainability and Environment Sub-Group to the LEP and the setting up of a £13 m Oxfordshire Environmental Investment Fund.

Partners in Oxfordshire are committed to the delivery of "Smart Oxford"[13]. 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, 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.

OxLEP is focusing £1.6m of its European Structural and Investment Fund (ESIF) monies (principally European Regional Development Fund - ERDF) on low carbon agendas in order to 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 later in 2016.

Oxford City Council has led on the delivery of '***Low Carbon Oxford: A Route Map to 2020***'. The Route Map is an action plan that sets out how the city of Oxford expects to meet its commitment to reduce carbon emissions by 40% by 2020. This target was established in the Council's sustainability strategy in 2011 and subsequently adopted by the Low Carbon Oxford Partnerships' Pathfinder members as a common goal.

By setting out the actions that partners around the city have taken and intend to take to reduce carbon, the Route Map provides a rigorous underpinning of Low Carbon Oxford's efforts to facilitate members' actions and projects that deliver change. It provides an understanding of which actions have the greatest impact and the exercise was an opportunity to explore and plug any gaps in the plan.

From both a City Council and Low Carbon Oxford perspective, the Route Map is a key step in progressing the transition to a low carbon economy. As the project moves forward there will be a need to look beyond the now standard solutions of energy efficiency and renewable generation. There will be a focus on operational transformation and the impacts of the supply chain. The Route Map provides the baseline from which leaders in sustainability can begin to shift from delivery roles into an increasing function as a facilitator of change, such as working with business operations to reduce the impact of on-site deliveries.

[13] http://oxfordsmartcity.uk/cgi-bin/index.pl

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In relation to the resilience of Oxfordshire's places, OxLEP has secured £25.85m through Local Growth Fund to part fund the Oxfordshire Flood Risk Management Scheme (total investment £88.35m), 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.

In addition, OxLEP has 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.

OxLEP's 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.

Box 4: An example of high quality place-making and innovative approaches to housing delivery: Graven Hill

The Graven Hill site lies just to the south of Bicester and extends to about 188 hectares in size. It is the first 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.

http://gravenhill.co.uk/

Box 5: Culham Smart City: people, place, enterprise and connectivity

"Culham Smart City" recognises that people will use digital tools in new and exciting ways for mobility, health, education and entertainment.

The world-class R&D at the University of Oxford's Robotics Institute, the new RACE (Remote Applications in Challenging Environments) facility at the UKAEA's Culham site, and Oxford Brookes Cognitive Robotics Laboratory are examples of excellence that place Oxfordshire at the heart of an emerging disruptive technology. Global companies involved include: Amey, Arriva, Bosch, JLR, Nissan, Siemens and many more. This work links with the big data catapults: Transport Systems, Future Cities, Digital and Satellite Applications. Strong local council support means access to planning and transport and housing data and agreement around strategic use of emerging technology to maximise impact, locally and internationally.

As a specific example, plans for Culham Smart City represent a nationally significant opportunity to draw together all the key elements, building a significant quantity of next generation housing close to employment, enabling upgrades to key infrastructure and signposting how we will live in the future. This also links with plans for testing and deploying emerging autonomous vehicle technologies along the Knowledge Spine that links Bicester, Oxford, Culham and Didcot. Smart Oxford creates a pipeline to use our world class research to address real world challenges and increase Oxfordshire's contribution to the national economy. OxLEP has a key role working with the councils, universities, national labs, industry and investors in coordinating the delivery of a coherent plan. OxLEP will promote increased access to data, for example, through data sharing agreements as part of the approval process for regeneration and infrastructure projects.

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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

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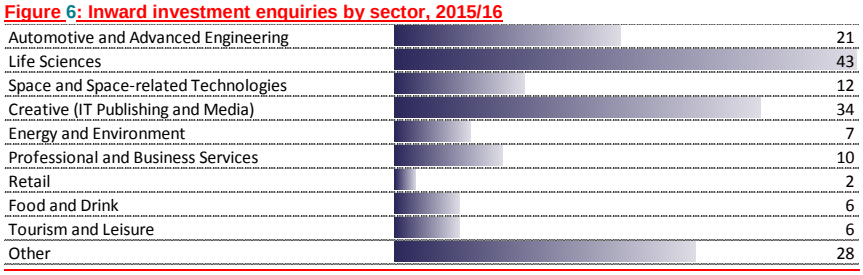
Oxfordshire is remarkable for the **range of business sectors and scientific disciplines** in which there is real strength and depth.

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.

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



(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	• Already 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 the 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 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 both 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

- improving 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
- focusing on export promotion among businesses with the potential to operate in international markets, and working in collaboration with UKTI to ensure its full support for exporting by Oxfordshire firms
- supporting 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
- celebrating 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

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- improving 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
- encouraging all employers to provide flexible jobs that can work for those on the margins of the labour market
- encouraging 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.

Support for globally significant, wealth creating sectors

- linking 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
- supporting 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

- delivering 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.
- supporting interrelationships between the tourism economies of Oxfordshire and surrounding areas, such as the Cotswolds
- supporting 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, OxLEP 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 intend to continue to advance the delivery of business support through **Oxfordshire Business Support (OBS)**. This requires appropriate funding for the long term sustainability of the service. 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. OxLEP will also establish a business ambassadors service to celebrate and communicate Oxfordshire's business excellence and distinctive successes.

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.

We will also prioritise the activities of **Invest in Oxfordshire** to promote inward investment into Oxfordshire, and build further on our already strong links with UKTI to support increased exporting by Oxfordshire firms.

OxLEP, in collaboration with the University of Oxford, has led on the production of an Innovation Strategy for the county (see Annex B for a summary of the draft strategy), and once finalised, we will support its implementation.

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).

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.

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Connectivity

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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

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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.

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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 city 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.

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Figure 8: Highway *Network in the morning peak – volume of traffic in relation to road capacity (85% to 95% = at capacity, 95% plus = over capacity)*

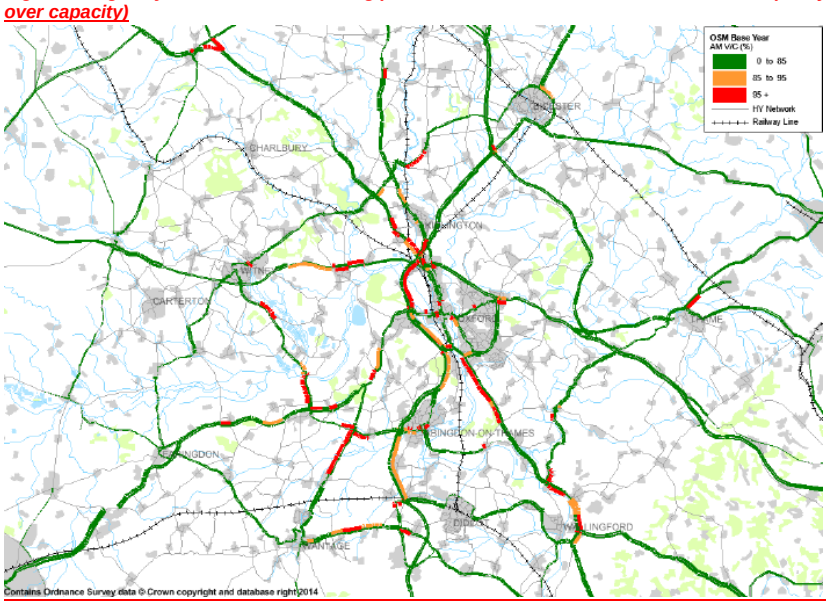
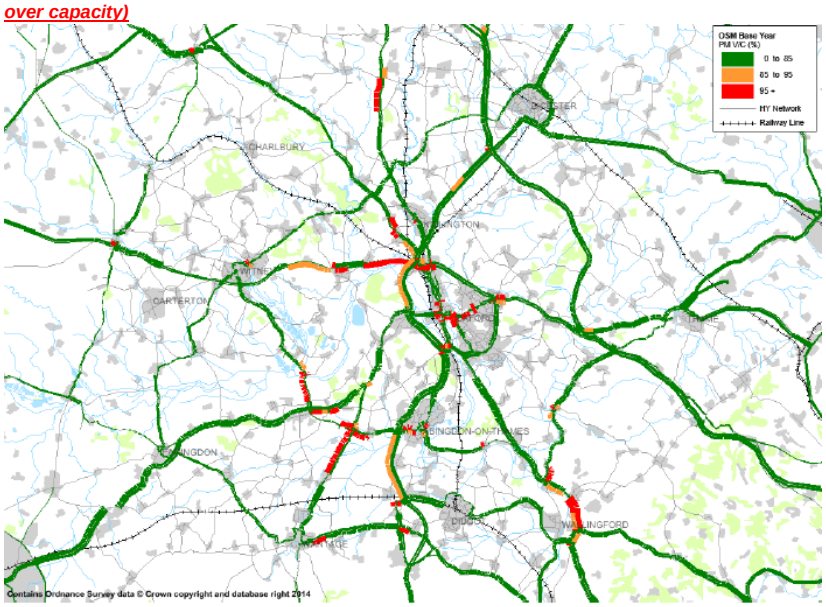


Figure 9: Highway *Network in the evening peak – volume of traffic in relation to road capacity (85% to 95% = at capacity, 95% plus = over capacity)*



Digital connectivity within Oxfordshire is generally good, although there are still some gaps. Access to broadband across the county has improved 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*".

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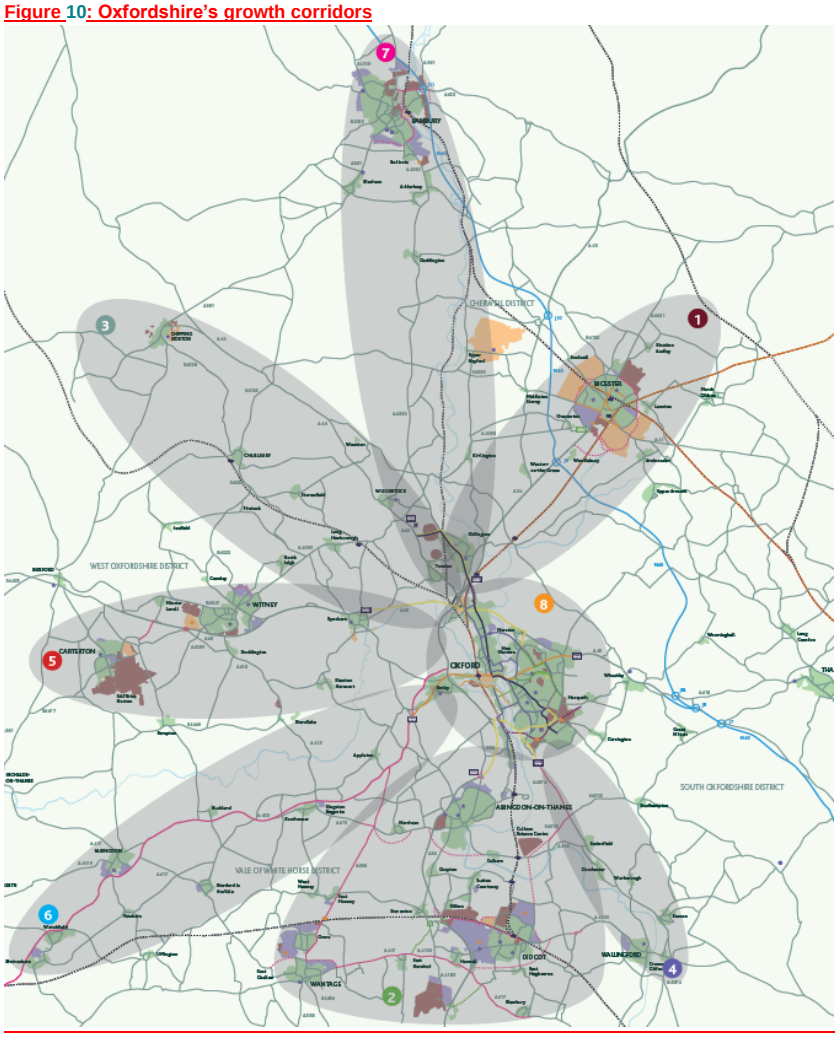
Figure 10: Oxfordshire's growth corridors



Priorities to 2020

In delivering the SEP, particular priority will be attached to:

Improvements to physical connectivity in Oxfordshire

- overcoming 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
- ensuring, through the planning process, that connectivity improvements are linked to the scale and location of planned housing and employment growth
- supporting the implementation of an Oxfordshire Infrastructure Strategy and the Local Transport Plan for Oxfordshire, including the Oxford Transport Strategy and the Science Transit Strategy, which includes various measures to improve the frequency, reliability and speed of public transport links between different locations in the Knowledge Spine
- supporting partners in implementing the Oxfordshire Active & Healthy Travel Strategy

Improvements to virtual connectivity with Oxfordshire

- completing 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

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- continuing the Network Navigators initiative and strengthening network coordination across sectors

Improvements to connectivity in a regional context

- supporting the work of the National Infrastructure Commission in relation to east-west connectivity through the Cambridge – Milton Keynes – Oxford corridor
- working with partners in 'England's Economic Heartland'[14] 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

OxLEP – and its partners – is 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 OxLEP 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)
- 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" tickets (akin to Oyster cards), 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 incorporates green infrastructure.

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. The LEP 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.

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". 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.

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.

[14] http://www.englandseconomicheartland.com/Pages/home.aspx

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The LEP also endorses Cherwell District Council's support in its Local Plan (Part 1) for the growth of air related business activities at 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, OxLEP 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. OxLEP 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.

OxLEP 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 National Infrastructure Commission's review of links between Oxford, Milton Keynes and Cambridge; 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; working with coach companies on long distance routes such as to Heathrow and London; and supporting Thames Valley Berkshire Local Enterprise Partnership in relation to a Third Thames Crossing.

Figure 11: Map showing inter-regional transport projects

Map has been commissioned

Moving forward in delivery

Monitoring and review

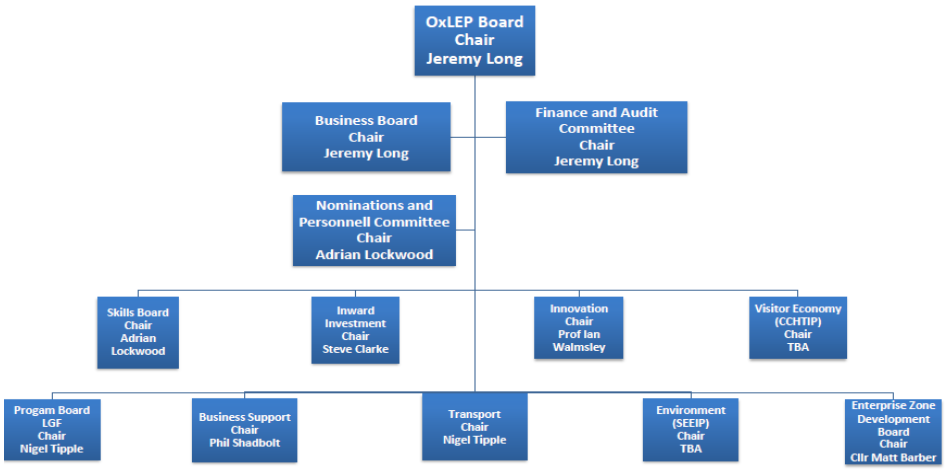
We are committed to an on-going process of monitoring and review. We will monitor progress in relation to our Programmes and the projects we, and partners, are supporting. We will also monitor changes in the economic and policy context for the SEP, and the extent to which our programmes are delivering sustainable and inclusive economic growth.

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.

The OxLEP Board

The OxLEP Board is continuing to develop in order to deliver the SEP. New sub groups will be set up to drive forward the work on the SEEIP, CCHTIP, Skills Strategy and the Innovation Strategy.

Figure 12: The OxLEP Board and sub-group structure



Wider governance arrangements

OxLEP will work closely with its 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.

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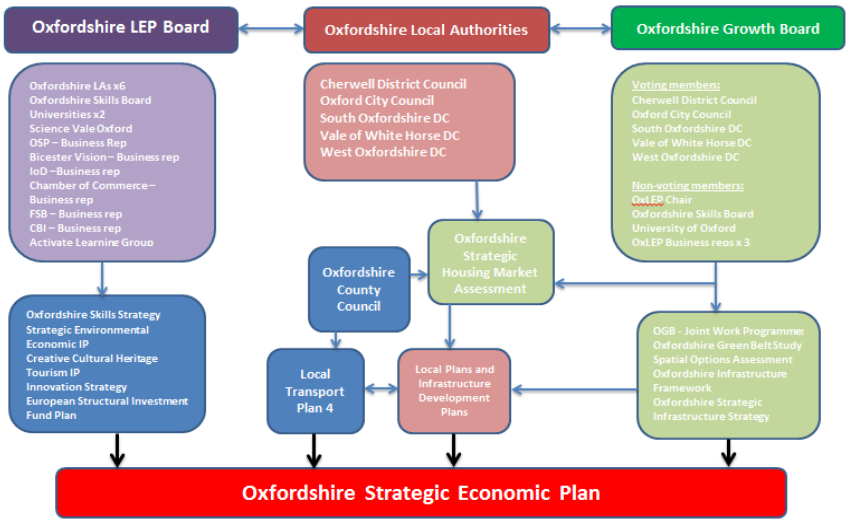
Figure 13: Oxfordshire LEP, Growth Board and Local Authority Relationships and Responsibilities



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.

OxLEP's wider responsibilities

Within this overall context, OxLEP – with its 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, OxLEP's roles in relation to delivery vary, 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 15. 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).

The LEP will continue to operate through its constituent parts/brands in the delivery of key SEP programmes. These include:

- Oxfordshire Apprenticeships
- O2i (Opportunities to Inspire)

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Objective from the Strategic Economic Plan, March 2014	Evidence of progress by April 2016
Enterprise	
Grow Oxfordshire's world-class technology clusters, leading to a GVA uplift of £6.6bn to 2030	• 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"*
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	• 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	• 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 ISIS have established a £320m fund, Oxford Sciences Innovation, to invest in spin outs from the University of Oxford, Culham and Harwell
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	• 29 foreign direct investments were recorded in Oxfordshire during 2014/15 - 8 of which were high value. Some 16 of the investments were within the Advanced Engineering and Manufacturing sectors. • 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	• 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

Working Draft

Objective from the Strategic Economic Plan, March 2014	Evidence of progress by April 2016
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	• Implementation of the first phase of the Oxford Science Transit strategy, providing a direct, fast public transport link between Oxford and Harwell • Improved access to Milton Park; and improvements at Botley
Increase the capacity and improve the efficiency and resilience of our local transport network by reducing congestion on key highway links	• 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	• 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	• Housing over 170 researchers and attracting over £70 million of investment, including £12 million from the Higher Education Funding Council for England (HEFCE), the 5GIC is the world's largest academic research centre dedicated to next generation mobile and wireless connectivity. • The Centre brings together leading academic expertise and major industry partners to define and develop a global 5G network that will radically change lives across the world. Through their work, they have already developed a technology that enables speeds of one terabit per second (Tbps) - more than 1,000 times faster than the highest 4G speed, and filed over 15 patents.
Increase connectivity between people and the quality natural environment to develop integrated sustainable transport routes	• Preparation and the beginnings of implementation of the Oxford Science Transit strategy

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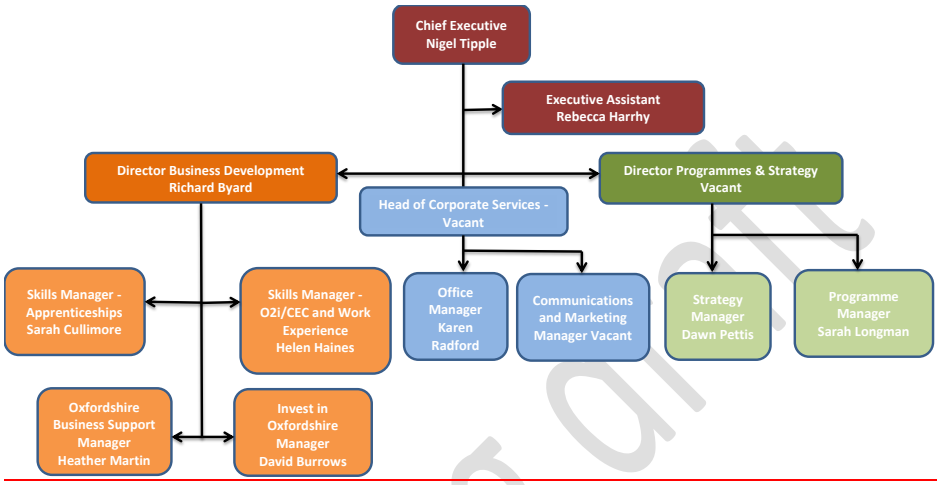
- ~~Creating the Environment for Growth:~~Oxfordshire Business Support
- Invest in Oxfordshire
- Oxfordshire Work Experience

Figure 14: LEP Executive Team



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Annex A: Progress in delivering our Strategic Economic Plan ~~for Oxfordshire – Consultation Draft 43 43~~

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

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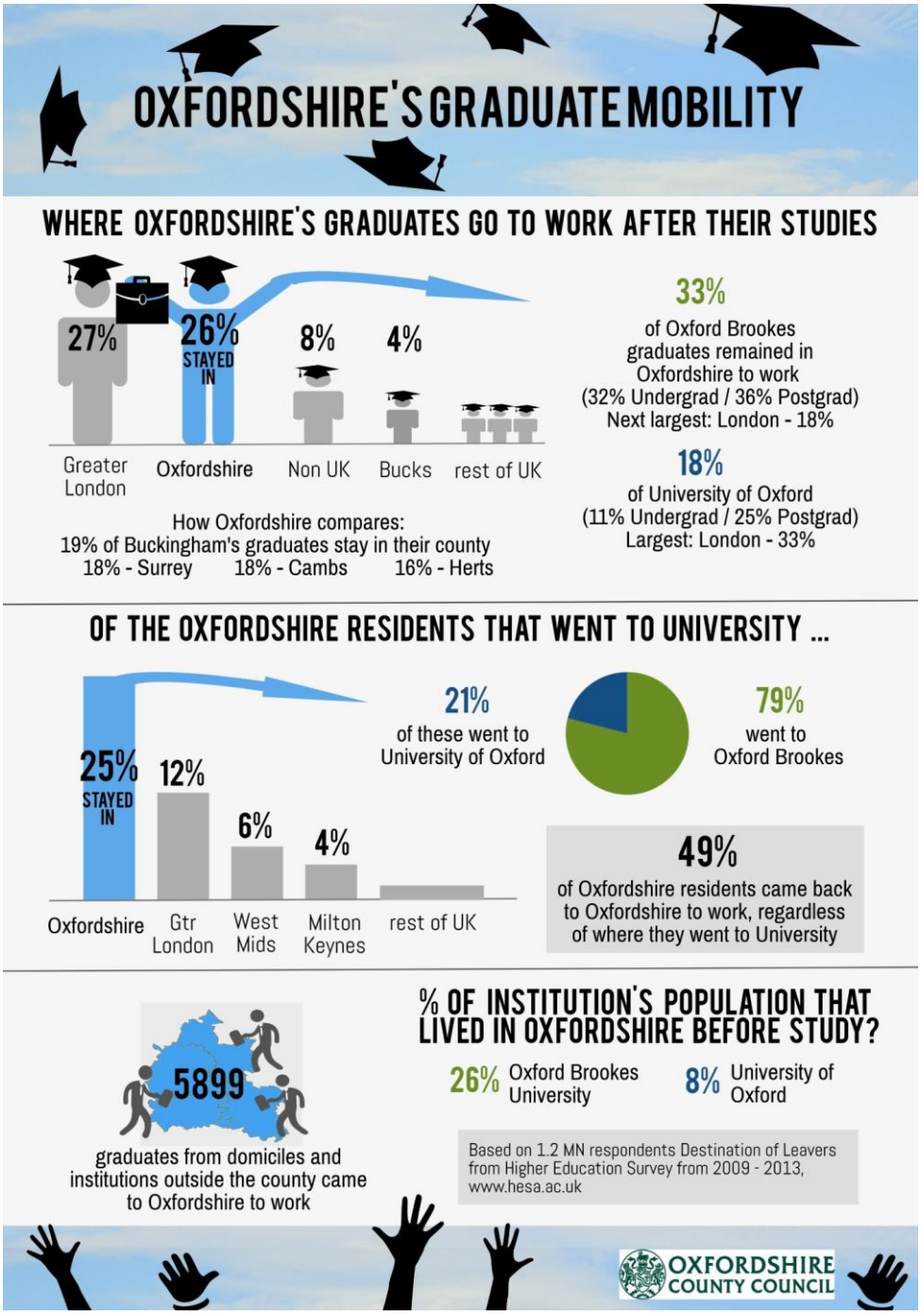
OXFORDSHIRE'S GRADUATE MOBILITY
WHERE OXFORDSHIRE'S GRADUATES GO TO WORK AFTER THEIR STUDIES
27%
26%
STAYED IN
8%
4%
Greater London
Oxfordshire
Non UK
Bucks
rest of UK
How Oxfordshire compares:
19% of Buckingham's graduates stay in their county
18% - Surrey 18% - Cambs 16% - Herts
33%
of Oxford Brookes graduates remained in Oxfordshire to work
(32% Undergrad / 36% Postgrad)
Next largest: London - 18%
18%
of University of Oxford
(11% Undergrad / 25% Postgrad)
Largest: London - 33%
OF THE OXFORDSHIRE RESIDENTS THAT WENT TO UNIVERSITY ...
25%
STAYED IN
12%
6%
4%
Oxfordshire
Gtr London
West Mids
Milton Keynes
rest of UK
21%
of these went to University of Oxford
79%
went to Oxford Brookes
49%
of Oxfordshire residents came back to Oxfordshire to work, regardless of where they went to University
5899
graduates from domiciles and institutions outside the county came to Oxfordshire to work
% OF INSTITUTION'S POPULATION THAT LIVED IN OXFORDSHIRE BEFORE STUDY?
26% Oxford Brookes University
8% University of Oxford
Based on 1.2 MN respondents Destination of Leavers from Higher Education Survey from 2009 - 2013, www.hesa.ac.uk
OXFORDSHIRE COUNTY COUNCIL

Annex B:

KEY:

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

…good progress appears to be being made

…some, or mixed, progress – but there is more to do

…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%		• 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		• 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
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		• 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		• 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		• 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
Retain our graduate talent		• 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

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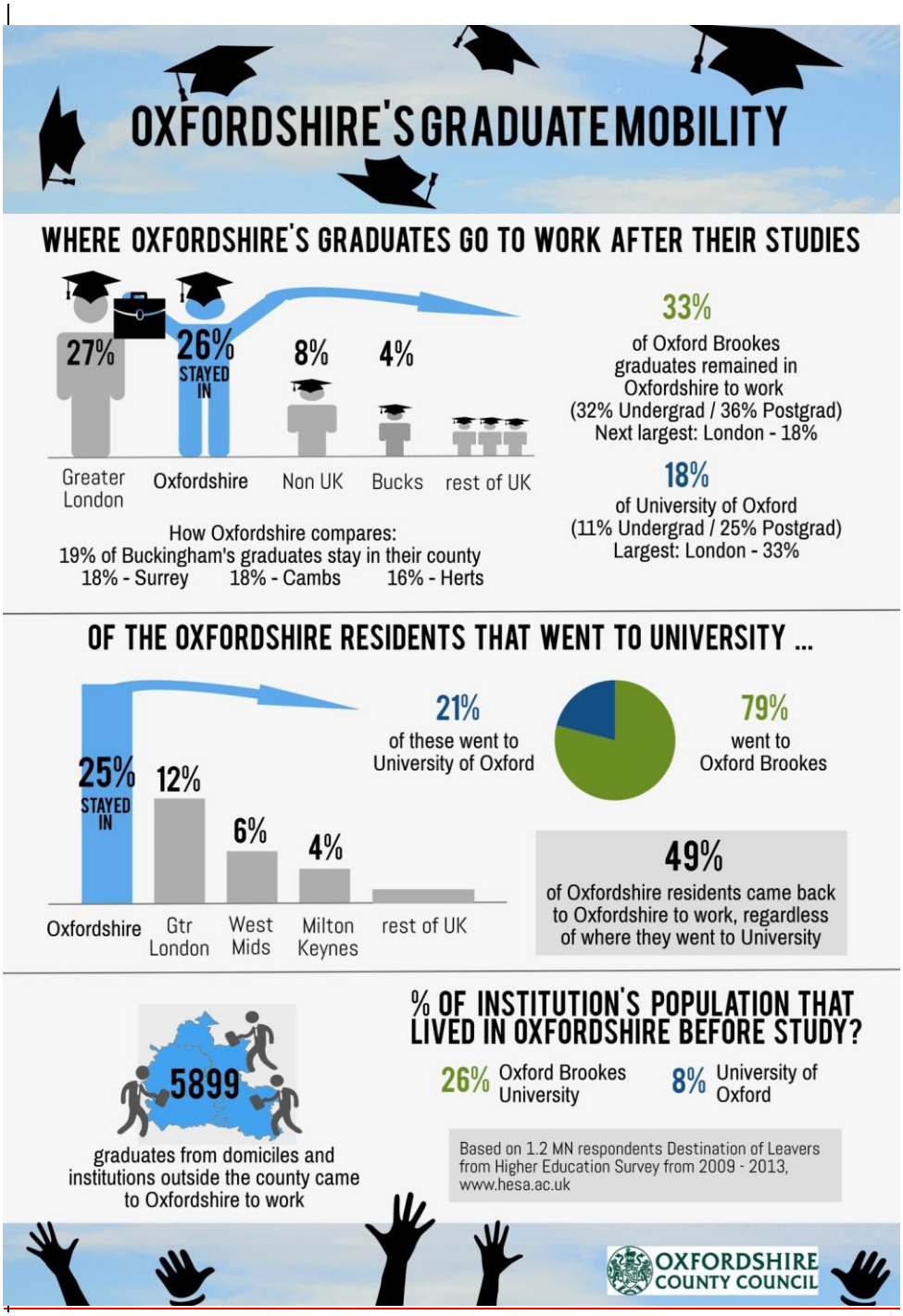
Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
		have opted to work in London (source: *Future of Cities: Graduate mobility and productivity* Foresight report published by Government Office for Science, March 2016) • In general, a high proportion of graduates 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		• 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		• 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		• As above
Provide accessible housing that is affordable for the people who work in Oxfordshire		• 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		• 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		• 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		• Delivery is on-going
Enterprise		
Grow Oxfordshire's world-class technology clusters, leading to a GVA uplift of £6.6bn to 2030		• 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*"
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		• 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		• 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

Working Draft

Objective from the Strategic Economic Plan, March 2014		Evidence of progress by April 2016
		invest in spin outs from the University of Oxford, Culham and Harwell
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		• 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		• 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		• 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
Increase the capacity and improve the efficiency and resilience of our local transport network by reducing congestion on key highway links		• 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		• 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		• TBC
Increase connectivity between people and the quality natural environment to develop integrated sustainable transport routes		• Preparation and the beginnings of implementation of the Oxford Science Transit strategy

working draft


OXFORDSHIRE'S GRADUATE MOBILITY
WHERE OXFORDSHIRE'S GRADUATES GO TO WORK AFTER THEIR STUDIES
27%
26%
STAYED IN
8%
4%
Greater London
Oxfordshire
Non UK
Bucks
rest of UK
How Oxfordshire compares:
19% of Buckingham's graduates stay in their county
18% - Surrey 18% - Cambs 16% - Herts
33%
of Oxford Brookes graduates remained in Oxfordshire to work
(32% Undergrad / 36% Postgrad)
Next largest: London - 18%
18%
of University of Oxford
(11% Undergrad / 25% Postgrad)
Largest: London - 33%
OF THE OXFORDSHIRE RESIDENTS THAT WENT TO UNIVERSITY ...
25%
STAYED IN
12%
6%
4%
Oxfordshire
Gtr London
West Mids
Milton Keynes
rest of UK
21%
of these went to University of Oxford
79%
went to Oxford Brookes
49%
of Oxfordshire residents came back to Oxfordshire to work, regardless of where they went to University
5899
graduates from domiciles and institutions outside the county came to Oxfordshire to work
% OF INSTITUTION'S POPULATION THAT LIVED IN OXFORDSHIRE BEFORE STUDY?
26% Oxford Brookes University
8% University of Oxford
Based on 1.2 MN respondents Destination of Leavers from Higher Education Survey from 2009 - 2013, www.hesa.ac.uk
OXFORDSHIRE COUNTY COUNCIL

Summaries of Oxfordshire's three

Annex B: 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 ~~CCHITP~~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

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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 services

This leads to five strategic priorities for investment:

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

Box B3:

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Oxfordshire's Innovation Strategy (draft)

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. ~~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. ~~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

3. Oxfordshire needs both a strategic and tactical approach to better understand where to develop new innovation spaces.

4. ~~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. ~~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. ~~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. ~~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. ~~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. ~~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.

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10. ~~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:

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Annex C:

- 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.*

Explanation of the relationship

Annex C: between OxLEP, the SEP and development planning

~~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, ~~all six local authorities, including~~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 ~~Economics~~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 ~~2014~~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

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- 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.

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Annex D: What we might achieve through sustainable and inclusive growth

Oxfordshire LEP is committed to supporting economic growth in Oxfordshire, focusing on interventions which deliver sustainable and inclusive outcomes and create a vibrant and world leading business environment.

We are doing this for the future prosperity and well-being of our businesses and residents. Oxfordshire has huge economic, social and environmental assets. From a national perspective, a failure to maximise use of those assets to create wealth and jobs would be very detrimental. Oxfordshire is one of the few parts of the UK which makes a substantial net positive contribution to the Exchequer, and it has the potential to generate a great deal more.

But economic growth in Oxfordshire is not just about satisfying national objectives. It is about

- ensuring today's and tomorrow's residents can find good jobs and homes they can afford in the county
- using 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
- enabling infrastructure improvements which we all want, but know we cannot afford without the public and private sector funding than only comes with growth
- being able to insist on, and afford, new development which is high quality and enhances the built environment
- being able to invest in developing the skills of our young people
- making better use of limited and precious resources such as water, energy and land.

~~Slowing the pace of growth by limiting access for Oxfordshire's businesses to the people they need is in no one's interests. They will be forced to recruit from further and further afield, and their employees will be forced to commute longer and longer distances to work from places where they can afford to live. The result in the short to medium term will be a steady increase in congestion, with minimal funding to improve infrastructure. In the longer term those firms that can – generally the main wealth creators – will grow elsewhere (many of them overseas), thereby cutting off the job opportunities they would otherwise provide for Oxfordshire's residents. And Oxfordshire's ageing population will be increasingly dependent on declining and unaffordable services. If Oxfordshire's local authorities don't provide for the scale of housing needed to support employment growth, homes become even less affordable, developments will be allowed on appeal in unsustainable locations, and we will not get the mix of housing needed.~~

~~Growth therefore needs to be both supported and managed, to produce positive outcomes.~~

~~This is what the LEP is seeking to do: to achieve the vision in the Strategic Economic Plan~~

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Annex E:

Annex D: 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
LEADER Liaison among Actors in Rural Economic Development
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

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Our Priorities

people

place

enterprise

connectivity

Deliver and attract specialist and flexible skills at all levels, across all sectors, as required by our business, with full, inclusive employment and fulfilling jobs.

Provide the quality environment and choice of homes needed to support growth and capitalise upon the exceptional

~~quality of life, vibrant economy and the dynamic urban and rural communities of our county.~~

~~Encouraged innovation led growth, underpinned by Oxford shire's strength s in Univ~~

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~~e r si t y r e s e a r c h a n d d e v el o p m e n t, b u si n e s s c o ll a b o r a ti o n a n d s u p p ly c h ai n p o t e n ti a l.~~

~~Allow people to move freely, connect easily and provide the services, environ ment~~

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~~and~~

~~facilities~~

~~needed~~

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~~dynamic~~,

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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

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