

Oxford's Economic Strategy



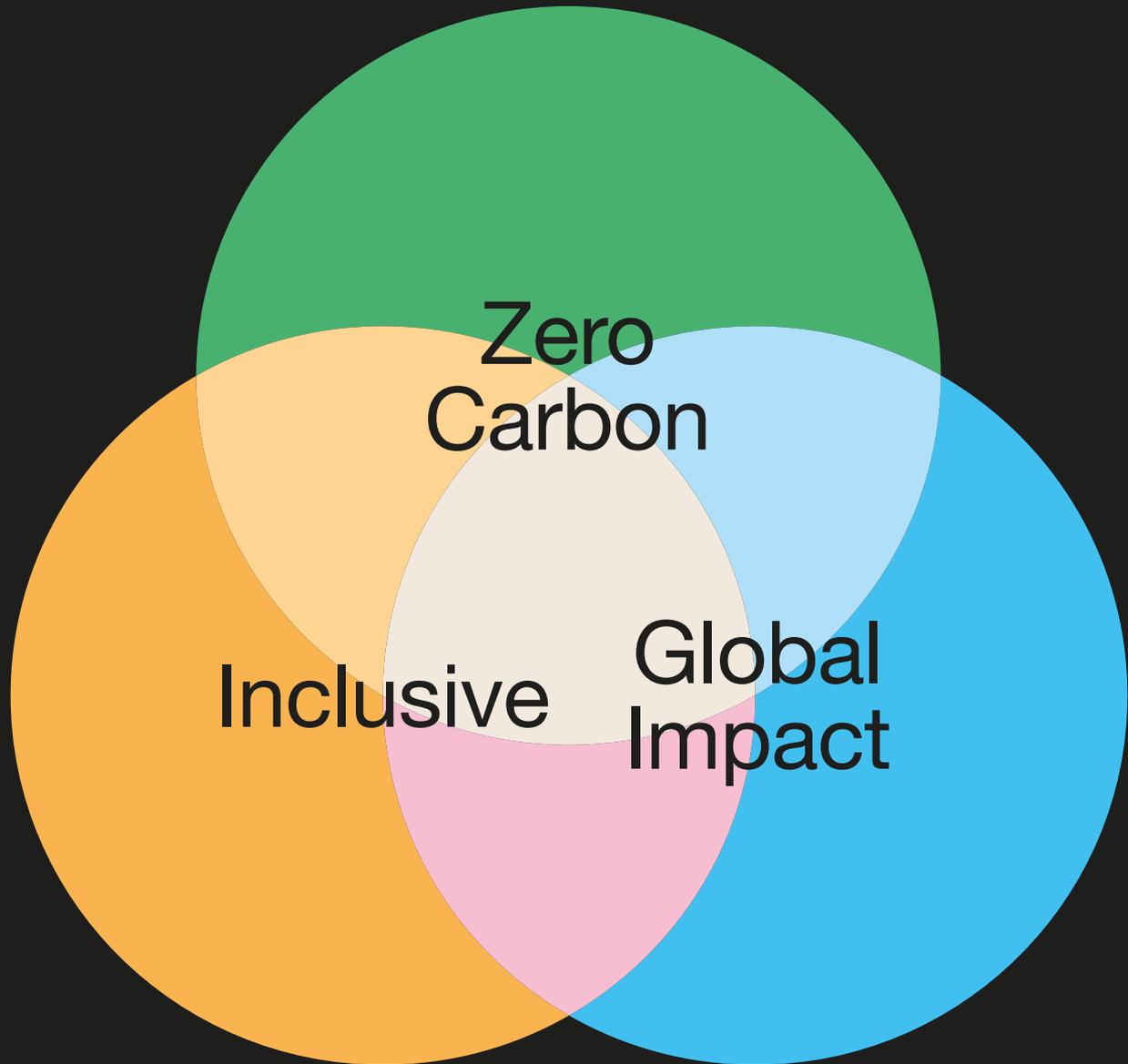
2022-2032

Oxford's Economic Strategy seeks to establish a new standard for economic **inclusion** in the city. This will be underpinned by the strength of an impactful **global** city economy, evolving in a way which recognises environmental limits and harnesses the opportunity of a new **zero carbon** economy

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Oxford will deliver the innovation and knowledge which will drive the global low carbon economy. We will embed zero carbon principles across future economic decision making whilst supporting residents and businesses to do the same



We will strive to address deep economic inequality and level up the city. We will develop new approaches to support the least advantaged people in the city, striving to guarantee a new standard of prosperity for all

Oxford will be a more innovative, purposeful and impactful economy. We will become an even more significant contributor to the UK economy, developing ideas that will change the world

Foreword

Oxford is one of the most important city economies in the UK. The Oxford Vaccine, both developed and manufactured here is just one example of countless world-changing innovations led by the city's universities and businesses. These range across technologies and sectors combining to create enterprises that benefit society, health and the environment.

Our city has 121,000 jobs which contribute around £6.8bn to the national economy each year. It is one of a handful of net contributors to the UK economy, with a globally significant knowledge economy which has led the response to COVID-19.

Having responded practically to the challenges of the pandemic alongside our partner local authorities, OxLEP, and the business, education and third sectors, the time has come to think about Oxford's economic future. This strategy not only helps Oxford navigate recovery, but ensures it fulfils its potential and role within the UK and globally, but in an inclusive, fair and green way.

To do this, we not only have to respond to immediate challenges, but must also act to address the fundamental and systemic problems which exist in Oxford, the most significant being inequality. This, alongside the chronic under supply of commercial space, housing and inefficient transport infrastructure, have seen the city's economic growth fall behind other places in recent years leaving individual and institutional potential unfulfilled.

Aligned to Oxford's Local Plan, our strategy seeks to balance our response to a range of factors and drivers; the need to address challenges and opportunities post-pandemic, issues related to Brexit, and the imperative to seek a new type of economy which does more for residents and the environment, inspired by the latest economic thinking. Alongside this, we must allow our vital universities and business to compete internationally, whilst contributing to the national bottom line and regional development.

I am pleased that this approach has been endorsed by the Oxford Economic Growth Steering Board, who have also supported the development of a set of actions which will form the foundations upon which we will build. The endorsement of our partners means we can be confident of a collective approach to delivery which will help us achieve our ambitions of creating an inclusive and zero carbon economy with a global outlook and impact.



Susan Brown
Leader Oxford City Council

Executive Summary

Case for Action

Oxford is city of beauty and a history that attracts visitors from all over the world. We are a centre of learning and innovation with global influence and impact, of which we should be rightly proud. We are also a city where inequality is stark - where decent and affordable housing is out of reach for many of our citizens, and where poor air quality damages the lives of many more. We need to make sure that Oxford continues to be an economically successful and attractive city; a place that people enjoy living and working in, as well as visiting.

Our evidence tells a story of a city which already has significant role in some of the world's most important economic sectors and technologies that have the potential to affect positive change in our societies. Evidence also tells us that Oxford is constrained in terms of suitable commercial space such as lab space and flexible office space, and connectivity across the city. We need to transition to a net zero economy across buildings, transport and supply chains. The scale of the challenge ahead of us is formidable but achievable if we mobilise all stakeholders and partners.

Why we need an Economic Strategy

We do not need an economic strategy that seeks growth as a means to an end. Yet, growth is already happening within local businesses and organisations, small or large, new or old. It is happening regardless of this strategy and others such as Oxford's Local Plan. The central challenge of sustainable economic development is meeting the needs of all Oxford's residents without breaching planetary boundaries, whilst fulfilling the city's important role.

Oxford's economy has positive global impact. As a hub of education and knowledge, it has a clear purpose, to address many of societies' challenges through science and technology. This can be seen with the ground breaking research in our Universities and institutes, the development of companies providing treatments for COVID, cancer and a range of health issues. It can be seen through the many companies offering energy and transport solutions that address carbon emissions, or the vibrant social enterprise community we have built. This global role must be nurtured and valued.

The changes accelerated by COVID provide both threats and opportunities and we need to position the city for recovery from the Pandemic as well as managing societal changes that impact our economy and residents in a range of ways. We need to be flexible and opportunity driven in approach.

Issues of income inequality, life expectancy, affordable housing and education attainment show the stark divide. Prioritising residents' needs, participation, and quality of life is again central to the need for this strategy.

Oxford's Economic Geography

Oxford City plays a key role developing research and incubating early stage companies. It is one of Oxfordshire's most sustainable locations to locate employment, due to its critical mass, and connectivity to transport and research assets. Housing in the city and the urban extensions will enable people to live close to where they work and travel sustainably reducing congestion and carbon emissions.

We also recognise the vital interdependence with neighbouring areas outside city boundaries. They share our collective potential and challenges and have complementary assets that contribute to a thriving economy and place. This extends beyond the county and across the Oxford to Cambridge Arc. Many businesses that establish in Oxford will go on to commercialise in other locations and spread opportunities regionally. We have firm links with key research institutions across Oxfordshire' Knowledge spine and need to address housing challenges alongside neighbouring local authority partners.

We need fundamental investment in zero carbon transport both locally and regionally; prioritising rail, bus travel and active travel if the economy is to grow sustainably. We need to focus on efficient use and re-use of our available sites allocated in Oxford's Local Plan, and like that plan, are not proposing allocation of any new sites in this document.

Strategy and Delivery Plan

Therefore, Oxford's Economic Strategy seeks to establish a three pronged approach. It seeks a new standard for economic inclusion in the city, underpinned by an impactful and purposeful global city. It seeks to rapidly address the environmental impacts of economic activity and harnesses the opportunity of a new zero carbon economy. Under each of these three pillars, we propose a range of guiding principles to ensure our aims are met.

Taking this approach will build resilience to the climate and ecological emergency and mitigates against the impact of resource scarcity and rising energy bills. It will build on Oxford's strengths, with a thriving economy that is at the forefront of the transition to Net Zero, with the

benefits of the additional skills and jobs this will help create. Our residents will benefit from a healthier, greener city – with more green space, warmer homes and less pollution.

The strategy is clearly focussed on delivery across a range of partners as can be seen in the many projects already underway and our ambitious Delivery Plans (see page 47 and 38).

Finally, delivery of this strategy is and will be inspired by new ways of thinking about the economy including principles of the circular, sharing, and a mission economies alongside Doughnut economics, alongside the UN Sustainable Development Goals. We will scan the horizon as we deliver this strategy, engaging with stakeholders, residents and businesses, to build consensus on the city's approach to sustainable economic development.

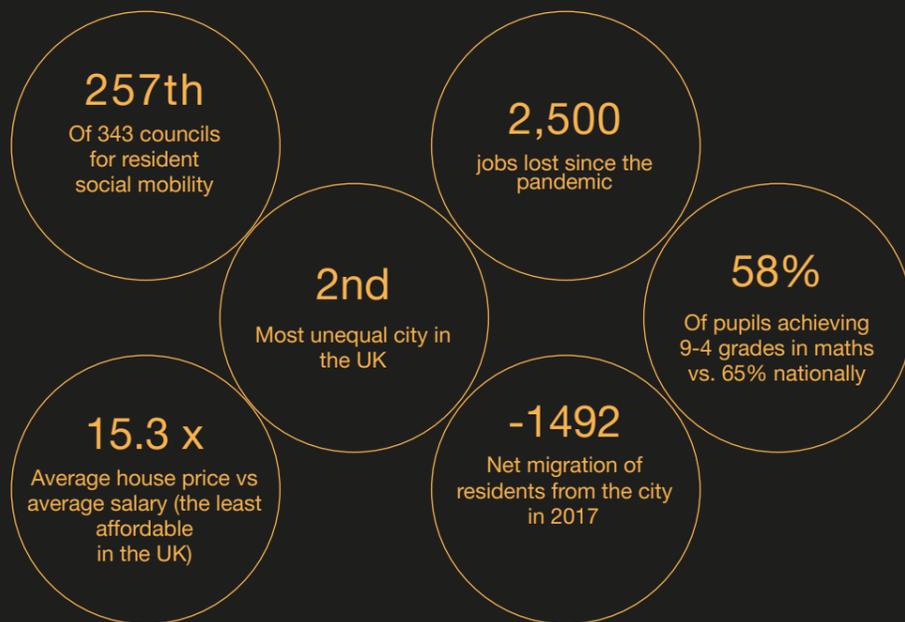
The Case for Action

We are aware of our role in supporting the UK's response to the pandemic, but also our responsibility to support each resident and business to overcome the ongoing challenge this brings.

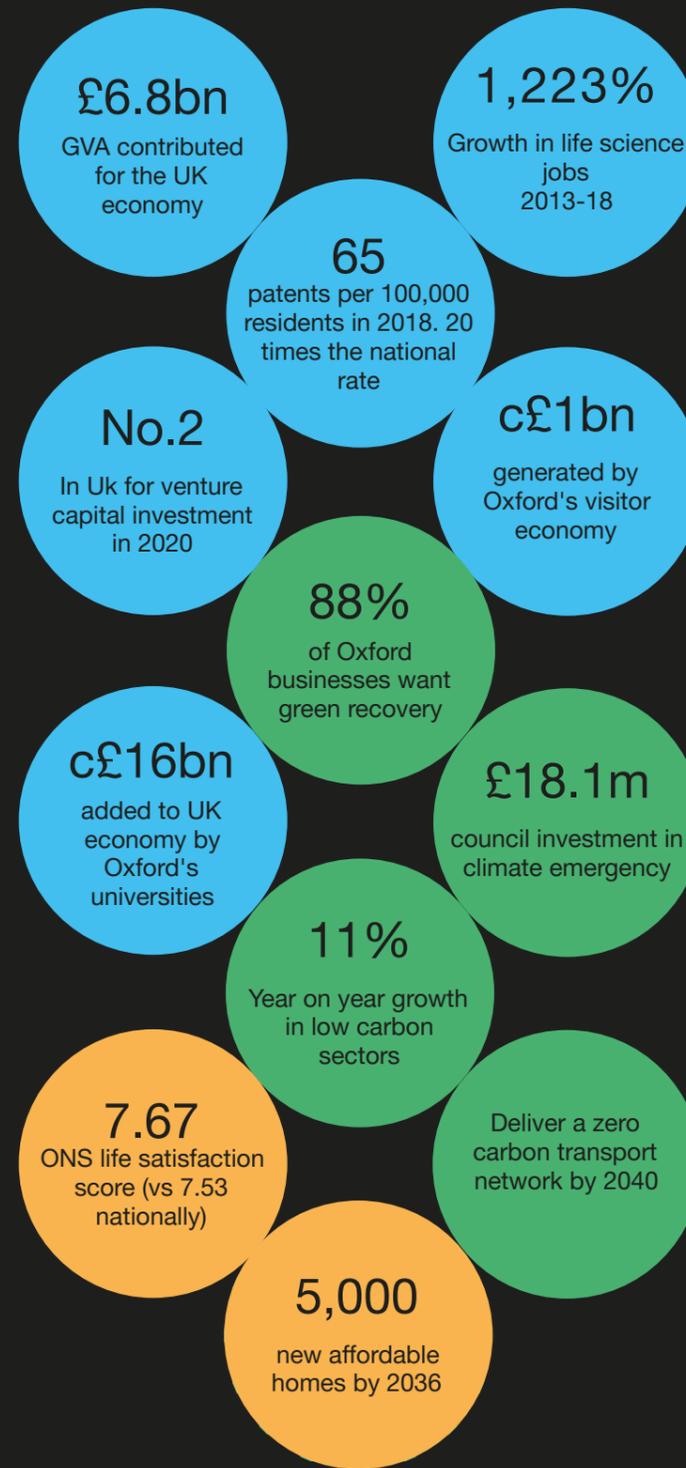
Our evidence tells a story of a city which already has significant influence and strength in some of the world's most important economic sectors.

Evidence also tells us that Oxford is constrained in terms of commercial space and that places within the city are not efficiently connected. Inequality shown within the statistics is stark and shows us the scale of the environmental challenge ahead of us.

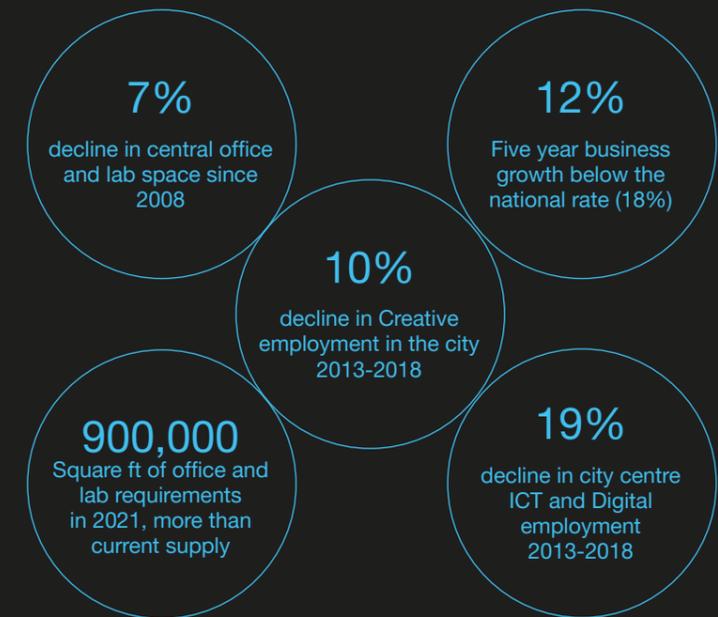
Inclusive Challenges



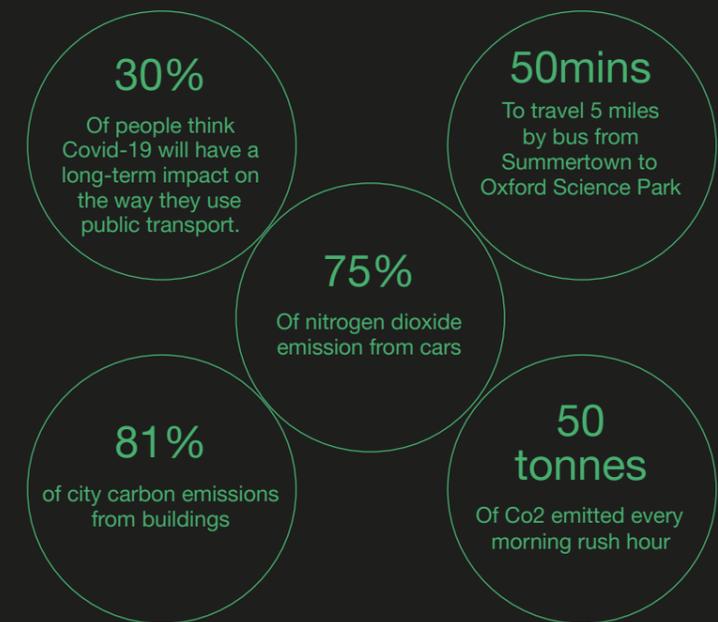
Our Strengths



Global Impact Challenges



Zero Carbon Challenges



Foundations of the Strategy

Why We Need a New Economic Strategy

Oxford is one of the most important and influential cities in the world. It is home to 151,600 people and 6,000 businesses. It has the highest employment rate in the country, 121,000 jobs, which contribute around £6.8bn to the national economy each year. It is visited by around 8 million people per annum (pre-pandemic) and boasts world class universities, a beautiful city centre, a vibrant leisure offer and enviable green space.

Our economy is underpinned by internationally, nationally and regionally important anchor institutions including the University of Oxford, Oxford Brookes University, Oxford Science Park, Oxford Business Park, John Radcliffe Hospital and MINI Plant Oxford. It is driven by a talented population – around 60% of whom have a degree level qualification or higher.

We have specialisms in knowledge, science and technology based industries and have high employment in robust and resilient sectors with strong foundations of innovation. Our universities have been a major contributor to this, with over 170 active spin-out companies, many of these commercialising rapidly as they attract new funds.

Alongside Oxfordshire, Oxford is one of a handful of net contributors to the national economy. The city has been identified by Government as a growth engine within the Oxford-Cambridge Arc, which is one of the most important areas for catalysing national productivity and easing the nation's housing crisis. Oxford is a national hub of low carbon innovation. It is home to two major energy innovation projects, Local Energy Oxfordshire (LEO) - enabling

the transition to a smarter, more flexible and decentralised energy system and Energy Superhub Oxford (ESO) - providing the largest public rapid and ultra-rapid EV charging hub in the UK. With its relatively dense population and role as a centre of commerce, culture and world class teaching, research and innovation, Oxford has the opportunity to play a key role in efforts to deal with the climate emergency.

Our strategy, needs to build on this, recognising the importance of the city in its surrounding context; its ability to create further knowledge and value for itself, **but for Oxfordshire, the South East and UK as whole.** The co-dependence of the City and the University of Oxford is vital to our success. **Helping both universities to grow and evolve is an ongoing priority.**

As the country starts to **recover from COVID-19 and adjusts to life outside of the EU, it needs cities like Oxford** and regions like Oxfordshire to be as strong as possible. To do this, the city will need to address some significant economic challenges.

City-wide, **business growth has slowed in recent years and the number of jobs has increased at a lower rate** than comparable UK cities. Some important sectors such as Life Sciences, Higher Education and Healthcare have prospered, but others such as ICT and Digital have declined mainly because of a chronic undersupply of commercial space, and also affordable local housing. Several sectors remain highly vulnerable to the impacts of COVID-19, particularly Hospitality, Leisure, Retail, Creative, Cultural and the Visitor Economy.

Investment in transport and active travel infrastructure is fundamental to the success of the economic strategy.

Post-pandemic, short-term reductions in commuting could have consequences for bus route viability, reduce modal shift and increase congestion. This could Create a range of economic and environmental costs which are likely to be exacerbated as Oxford’s population continues to grow. Journey times can be over 10 minutes per mile by public transport and availability and cost of public transport can inhibit the mobility of much of the population where a populace of educators, students, health workers, visitor economy workers and those engaged in R&D still require travel for work. New models of last mile logistics need to be developed if we are to achieve a more efficient and collaborative economic ecosystem in our city centre.

The city and its neighbouring areas, which are vitally important to the county economy, must also be better connected. Moreover, connections to other important economic nodes and anchors across the country would underpin stronger regional growth across the Oxford to Cambridge Arc and Thames Valley.

Inequality is however, the most significant challenge Oxford faces. We are the second most unequal city in the country in terms of income, only marginally behind Cambridge. Neighbourhoods that are among the richest in the country sit alongside some of the most deprived.

Prospects for those living and growing up in deprived areas are poor. Average educational attainment in state schools is well below the national average. Pre COVID-19, the Social Mobility Index, which assess areas on prospects for disadvantaged young people, ranked Oxford 257th out of 343 local authorities for social mobility. It is the least affordable city in the country

in terms of house prices. Several of our communities are also those which have been most severely impacted by the pandemic, recession and structural changes in the nature of work. We must respond to this, not only **by seeking to connect people with new opportunities, but to build local capacity to influence and retain wealth in our neighbourhoods, alongside efforts to locate housing in sustainable and affordable locations in or close to Oxford.**

The city has declared a climate and ecological emergency. In 2019, Oxford was the first UK city to hold a Citizens Assembly on Climate Change. This representative sample of Oxford’s residents concluded that Oxford should decarbonise faster than national targets. The City Council has a target to achieve Net Zero across its own operations by 2030. In 2021, the Council brought together Oxford’s major businesses and organisations – including the universities, teaching hospitals, local authorities, BMW Mini, Unipart, SSEN, housebuilders and others - to create the Zero Carbon Oxford Partnership (ZCOP). Working with the Carbon Trust, ZCOP has developed and adopted a Net Zero Roadmap and Action Plan, which seeks to achieve Net Zero by 2040 through collaborative working.

This strategy does not exist in isolation. Its influence is wide and as such, needs to be considered in conjunction with other strategies. (see p38)

Moreover, the City Council cannot deliver this strategy in isolation. Only by building on the effective collaboration with partners (Oxfordshire County Council, neighbouring district councils, OxLEP, business, education, and third sectors) developed through the pandemic, can we deliver an effective strategy as we re-imagine our local economy.

Building on Momentum with a Sustainable Approach

Oxford City Council, and our many vital partners across all sectors, are already delivering and supporting projects which advance our inclusive, zero carbon and global impact objectives in line with broad sustainable development objectives.

We will work together to scale this and ensure that we recognise the links between the three pillars of our strategy. This means we will seek to ensure all projects can impact positively across all three pillars.



Oxford's Economic Geography

Oxford is strategically placed within one of the country's most important economic regions.

It is an integral part of the Oxford-Cambridge Arc which has been prioritised by Government to drive connectivity, national productivity, and housing growth. With the right investment, it will become a world leading economic region that has the potential to deliver over £190bn each year to the national economy.

It is also a key part of the Oxfordshire 'Knowledge Spine' which includes important knowledge intensive areas from Bicester in the north to the Science Vale business cluster in the south¹. There are also several important nodes for housing growth such as Bicester and vital urban extensions are planned adjacent to the city. Therefore, our strategy is guided by the existing cooperation and joint planning of all of Oxfordshire's Local Authorities, who have allocated sites for development through their aligned Local Plans. This collaboration is vital to the region achieving sustainable economic development, and positioning homes and employment in the most sustainable locations adjacent to low carbon transport network options.

Flood plain and green belt mean space for development in parts of the city is severely constrained. There are however distinct areas where we can accommodate future growth of economic activity, diversification and a growing workforce that need affordable homes. In line with planning policy, these consolidate existing growth nodes with planned urban extensions to provide focus in the north, south and east of the city alongside evolution of the city centre in the West End.

Within Oxfordshire places like Bicester, Didcot, Banbury and Abingdon are all fundamentally linked to the city's economy. All these areas have major economic assets and opportunities (e.g. Begbroke Science Park, Motor Sport Valley, Culham Science Park and the Harwell, Didcot and Milton Park Enterprise Zones). Better connecting these places to the city and each other, will be integral to the creation of a stronger economic ecosystem.

5 Fundamental Investments

The successful delivery of the strategy is predicated on more efficient, sustainable movement of people and goods. Without these five investments we believe our Inclusive, Global and Net Zero ambitions could be compromised:

1. Investment in a new station for Oxford
2. Investment in the Cowley Branch line extension
3. Deliver city centre wide Zero Emission Zone, traffic filters and a city-wide workplace parking levy to enable net zero transport (see below)
4. Improved bus provision, information and infrastructure, to better connect people to jobs, including electric fleet
5. Major investment in active travel modes, to mobilise a greener workforce.

We will work to secure social value benefits across all major investments with our key partners

¹ This includes Abingdon, Didcot, Milton Park as well as the Harwell, Didcot and Milton Park Enterprise Zones

Capacity to Accommodate Economic Activity and Growth

Key

- City Boundary
- Urban Extensions
- Zero Emission Zone
- Railway
- Proposed Cowley Branch Line
- Major Roads

A Cowley Branch Line reopening of Cowley Branch line to connect Oxford Science Village, Oxford Business Park and surrounding areas to Oxford station and beyond

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B Station Upgrades redeveloping the station and enabling East West rail to improve connections to Swindon, Bristol and other economic nodes

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C City centre Improvements Tactical urban improvements to support enhanced environment and a greater concentration of commercial space centrally

Major Economic Nodes

- 1 City Centre
- 2 Oxford Business Park
- 3 Oxford Science Park
- 4 Headington Health Technology Cluster
- 5 Automotive Cluster
- 6 Oxford North

Core Transport Proposals subject to public consultation

- Bus and Active Travel Corridor Improvements to reprioritise road space
- Orbital public transport improvements

Development Constraints

- Green Belt within city boundary
- Floodplain within city boundary
- Green Belt outside city boundary

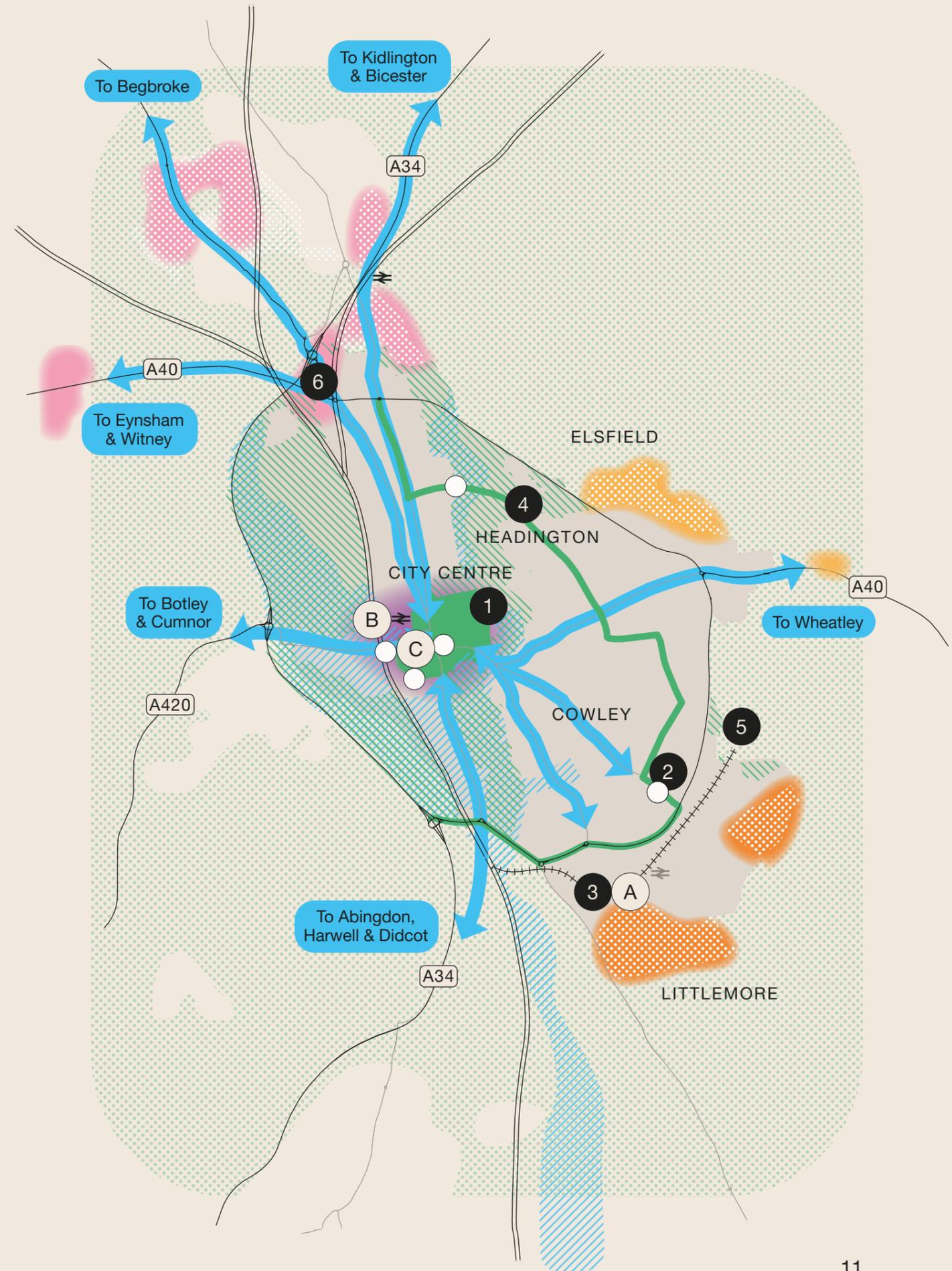
Planned Areas for Development

Northern: the development of Oxford North and new urban development in Cherwell

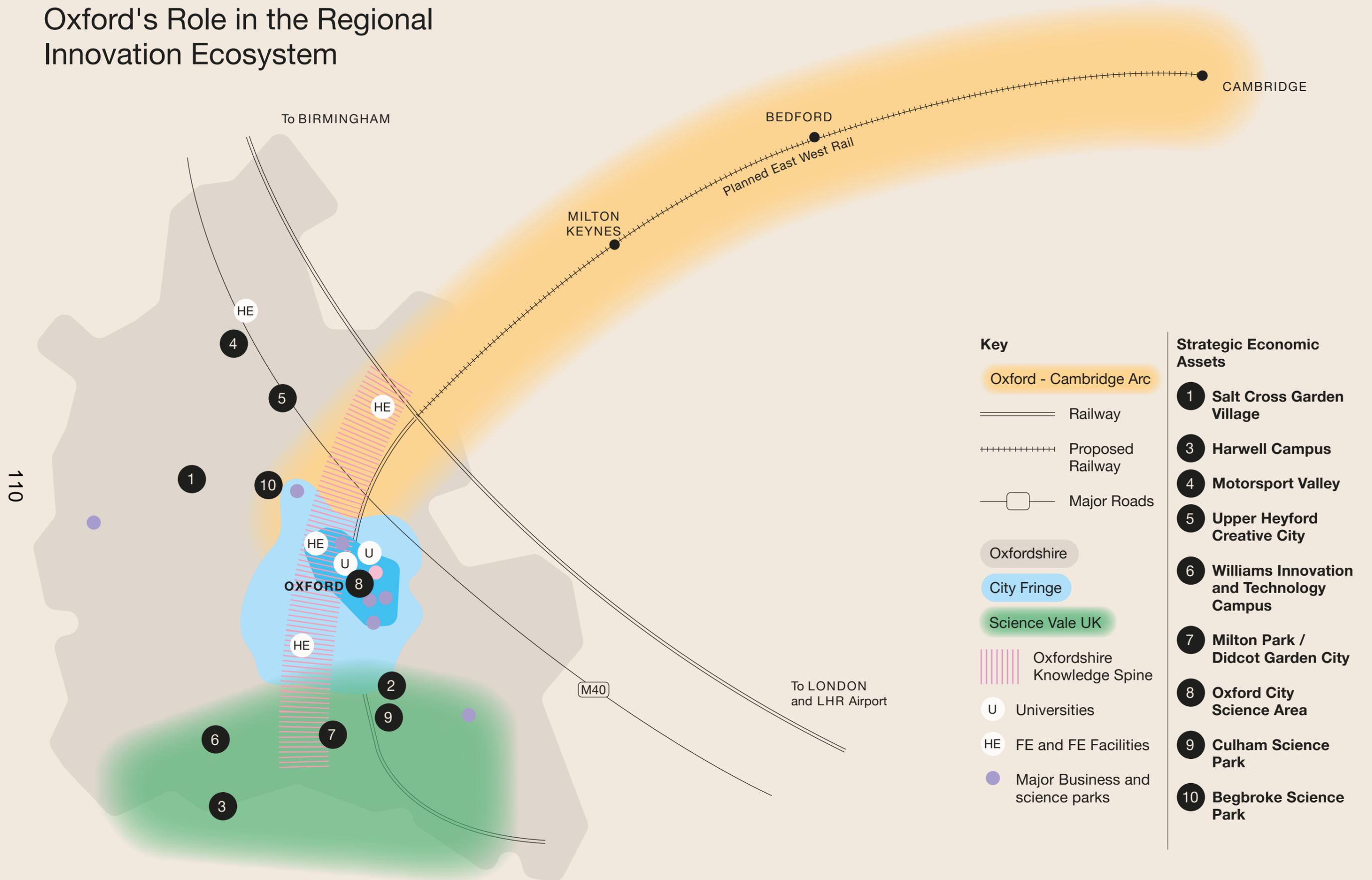
West End and City Centre: Westerly expansion of city centre through a new innovation district

Eastern: Evolving health clusters around Headington and development east of Barton. Continued evolution of Oxford Brookes Campus

Southern: Oxford Science Park and Oxford Business Park, the automotive cluster and urban developments at Northfield, South Oxford Science Village, Neighbourhood improvements at Blackbird Leys



Oxford's Role in the Regional Innovation Ecosystem



Key

- Oxford - Cambridge Arc
- Railway
- Proposed Railway
- Major Roads
- Oxfordshire
- City Fringe
- Science Vale UK
- Oxfordshire Knowledge Spine
- U Universities
- HE FE and FE Facilities
- Major Business and science parks

Strategic Economic Assets

- 1 Salt Cross Garden Village
- 3 Harwell Campus
- 4 Motorsport Valley
- 5 Upper Heyford Creative City
- 6 Williams Innovation and Technology Campus
- 7 Milton Park / Didcot Garden City
- 8 Oxford City Science Area
- 9 Culham Science Park
- 10 Begbroke Science Park



Moving Towards a Zero Carbon Economy

Issue and Opportunity

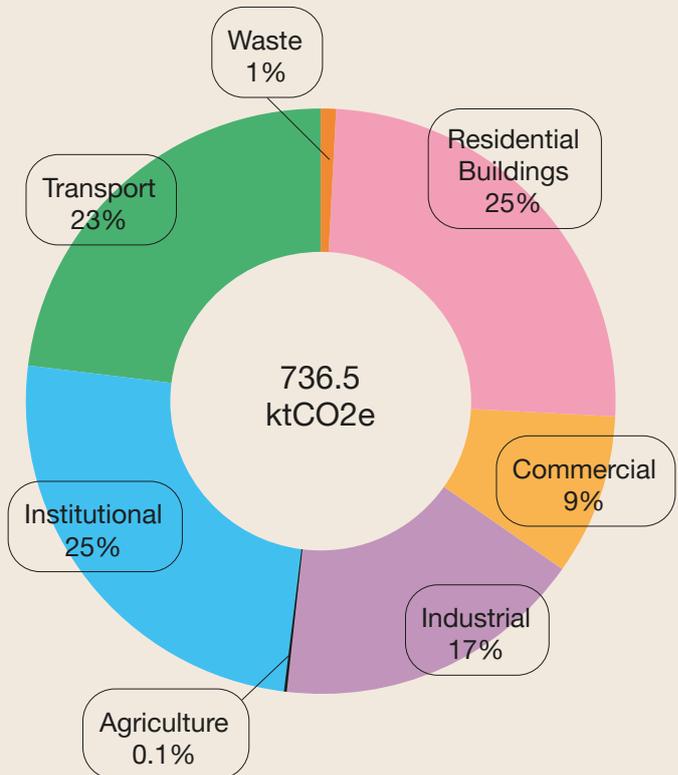
The world is in the midst of a climate and ecological emergency, which is accelerating faster than expected, threatening humanity and the world's natural ecosystems.

In 2019 the Oxford City Council declared a climate emergency and committed to reduce emissions from its own buildings and operations to Net Zero by 2030.

In 2021, the Council brought together Oxford's major businesses and organisations – including the universities, teaching hospitals, local authorities, BMW Mini, Unipart, SSEN, housebuilders and others - to create the Zero Carbon Oxford Partnership (ZCOP). Working with the Carbon Trust, ZCOP has developed and adopted a Net Zero Roadmap and Action Plan, which seeks to achieve Net Zero by 2040 through collaborative working.

The Council's leadership on climate change has been developed with active input from the local community. In 2019, Oxford was the first UK city to hold a Citizens Assembly on Climate Change.

Residential buildings and transport account for almost half of Oxford's emissions (see below). Achieving Net Zero will require high-impact, sustained changes in citizen and organisational behaviour.



2018 Baseline emissions in Oxford

Zero Carbon Economy: Responding to Challenge and Delivering Opportunity

Achieving Net Zero by 2040 will mean a variety of economic, social and environmental benefits can be achieved. These include the creation of high skilled, well paid jobs in the zero carbon sector; creating cohesive and desirable places to live by empowering local communities and diverse individuals to drive action; and cutting air pollution.

Restoring habitats, providing urban green infrastructure and shifting to regenerative agriculture can support wildlife while delivering ecosystem services such as natural flood management and urban cooling, and providing health and wellbeing benefits for local people. *Pathways to Zero Carbon Oxfordshire (2021)*

What is Net Zero?

There is no globally agreed definition of Net Zero. However, the emerging consensus is that Net Zero emissions can be achieved by reducing emissions as far to zero as possible, with any remaining hard-to-decarbonise emissions compensated with offsets (e.g., greenhouse gas removals).

Oxford's 2040 Net Zero target is defined in the ZCOP's Net Zero Action Plan. "Net Zero" has been adopted (rather than absolute zero) because it is generally accepted that there may be a small amount of residual emissions arising from hard-to-decarbonise activities, including those outside the city's control such as HGV transport.

- An ambitious **1.5°C aligned Science Based Target**
- for all emissions **sources covered with the BASIC+** reporting level of the Global Protocol for Community-Scale Greenhouse gas Emission Inventories (GPC).
- Any remaining hard-to-decarbonise emissions can be compensated with **certified greenhouse gas removals (GCRs)**

Zero Carbon Oxford Partnership Roadmap and Action Plan, page 10

The groundwork is in place for Oxford to be the first truly Net Zero city in the UK, with a strong foundation and economic opportunity through innovation projects such as LEO and ESO, the Zero Carbon Oxford Partnership and organisations such as the Low Carbon Hub.

One of Oxford's most pressing issues is air pollution, which is relatively high and has increased in recent years³. There are several locations across the city where the national and European legal limit for nitrogen dioxide and other greenhouse gases is exceeded.

Pollution brings a range of economic costs for Oxford and is bad for business. Evidence from the OECD⁴ shows that high levels of air pollution cause health issues which, in turn, place a financial burden on health services and reduce

business productivity through increased employee sickness and reduced cognitive performance. Many cities with high levels of air pollution have also suffered from brain drain of talented people looking for a better quality of life and reduced international tourism where it has impacted the visitor experience.

Another growing issue is fuel poverty and emissions from Oxford's building stock. Reducing emissions through retrofit brings multiple benefits including: "avoidance of physical (particularly respiratory health in children) and mental stresses linked to decreased absenteeism from school by children and from work by adults; with potential impacts on academic performance, labour productivity and earning power". Source: Energy Saving Trust.

3. Nitrogen dioxide levels rose by 7.9% between 2018 and 2019

4. Organisation for Economic Co-Operation and Development

Our Response: Addressing Crisis and Enabling Opportunity

Whilst the challenge of climate crisis is critical to our future, Oxford is uniquely placed to play a prominent role in the national and global response.

The Zero Carbon Oxford Partnership is bringing businesses and institutions together locally, and we are planning for this to evolve quickly, as it must. Oxford will become an exemplar in developing partnership driven solutions to the climate crisis.

Our low-carbon sector is already thriving. The University of Oxford has successfully generated 30 new cleantech spinout companies and two of four national energy systems demonstrator projects are based in Oxfordshire. Our automotive sector continues to lead the way on innovation for autonomous and electric vehicles, with companies including Waymo, Oxbotica, StreetDrone, Arrival, alongside the nearby RACE, Culham, a leading connected autonomous vehicle (CAV) testbed.

Our strategy recognises that the knowledge and innovation realised within the city can, be capitalised elsewhere in the city or in Oxfordshire more generally. We therefore, want to support tangible links to locations like Harwell Campus and Begbroke and ensure that knowledge exchange with companies like BMW, Williams, Mercedes and Siemens can be strengthened.

Alongside this, community groups and SMEs continue to develop solutions to reduce carbon emissions through

alternative business models and the sharing economy. We will work to support this activity through our commitment to strengthening civil society and socially orientated business in the city.

We will continue to inform residents and business of the economic benefits of adapting to climate crisis. We will better demonstrate how addressing climate change will save money, tackle inequality and create jobs. Lower household bills, better health from active travel and more affordable transport within the city will all contribute to addressing inequality and improving wellbeing.

There is a clear economic rationale to reduce the negative environmental impacts of Oxford's economic activity, this is coupled with an opportunity to curate an economy that actively contributes to tackling environmental issues. Our approach to a greener economy will blend global solutions with grassroots action, testing new approaches, scaling activity and driving investment as a result.

We will take proactive steps by adopting a consistent and robust framework to achieve sustainable economic development in Oxford, considering a range of approaches such as Doughnut Economics, circular and sharing economy and the UN Sustainable Development Goals.

Guiding Principles to Move Towards a Zero Carbon City

We are committed to putting environmental concerns at the forefront of our approach to economic development. This economy will be powered by renewables, energy storage and grid solutions, low carbon transport, digital infrastructure, sustainable construction and ethical consumption.

Decisions we make now will have ramifications on the ability to achieve

carbon reduction targets. The local economy must move rapidly towards net zero or we will incur costs in the future. It is important that we act now to ensure that we are able deliver sustainable economic development that does not compromise the environmental future of the city.

To achieve this, we will focus on the following ambitions over the next ten years:

- 1 Take proactive steps to measure and reduce the environmental impact of economic activity
- 2 Mitigate the environmental impacts of new development and housing growth, through new policies, commitments and innovations from developers and investors
- 3 Support the growth of the green and low carbon sectors through innovative partnerships and targeted business support
- 4 Facilitate flows of knowledge and available funding both locally and regionally, positioning the city as a low carbon leader
- 5 Partner with local institutions and support businesses to decarbonise across their operations and supply chains, sharing good practice
- 6 Work with communities to adopt place-based approaches to Net Zero, combining retrofit, transport, biodiversity and community regeneration projects
- 7 Develop budgeting processes which support investment in zero carbon development
- 8 Support and partner businesses and institutions to be socially and environmentally responsible
- 9 Develop communications and engagement programmes on Net Zero, building on the Citizen's Assembly on Climate Change to ensure the transition to Net Zero is done in collaboration with residents and businesses
- 10 Work with Partners to increase active travel and implement net zero transport within the city

A detailed action plan against these ambitions is set out in the accompanying delivery plan.

Milestones

The Zero Carbon Oxford Partnership has developed a comprehensive roadmap and action plan to achieve Net Zero in Oxford by 2040.

The ZCOP will report against 5 yearly carbon targets, following best practice by focusing on short-term action to achieve the 2040 goal. These targets have been informed by evidence from the City Council's scientific advisor, Professor Nick Eyre in terms of what is both ambitious and possible to achieve in a city like Oxford, which has limited emissions from the 'hard to decarbonise' sectors notably industrial processes, aviation, shipping, heavy freight and agriculture.

The ZCOP's Roadmap and Action Plan sets out a series of milestones and KPIs that will be monitored, to ensure the city remains on track to achieve its carbon targets.

Alongside the strategic roadmap, sector specific roadmaps were also agreed in the ZCOP Roadmap and Action Plan.

Reducing emissions from buildings

The majority of Oxford's emissions arise from the buildings sector, largely due to the high proportion of gas-heated buildings.

There are around 55,000 homes in Oxford, with over 60% rated EPC D or below. Tackling leaky homes is key to addressing fuel poverty and mitigating against the rising cost of energy.

The strategy for decarbonising buildings in Oxford (Residential, Commercial and Institutional) can be summarised by the uptake of energy efficiency (both building fabric improvements and smart appliances), electrification of heat (with heat pumps) and installation of rooftop (or commercial-scale) solar PV. With these measures, it is expected that the average household energy demand (for gas and electricity sourced from the national grids) falls by 61% in 2040.

Retrofit fabric improvements is a high priority for this sector, considered essential not only in reducing carbon impact, but also mitigating against energy price rises and reducing the strain on the electricity grid.

Five yearly carbon budgets for Oxford 2020 – 2040

Source: Zero Carbon Oxford Partnership Roadmap and Action Plan

Net Zero target	2040	
Total carbon budget (2018-2040)	7,624 ktCO ₂ e	
Carbon emissions reduction by 2025 <i>Cf. 2018 base year</i>	-44.3%	(409.6 ktCO ₂ e)
Carbon emissions reduction by 2030	-63.2%	(409.6 ktCO ₂ e)
Carbon emissions reduction by 2035	-78.3%	(409.6 ktCO ₂ e)
Carbon emissions reduction by 2040	-87.9%	(409.6 ktCO ₂ e)
Amount of carbon to be offset in the year 2040	-88.7 ktCO ₂ e	

The City Council has agreed a target of 95% of its housing stock to be EPC level C or above by 2030, including a 7.2m investment programme to support this outcome. This includes developing a set of standard packages of work that can be undertaken simultaneously to ensure energy efficiency measures are also delivered at least inconvenience to the tenant.

We will work with partners to harness this economic opportunity, lobby for additional funding from central government to scale-up delivery of energy efficiency across the city - and trial solutions to achieve at-scale retrofit, targeting areas that are most exposed due to energy price rises.

Supporting Low Carbon Movement and Growth

We believe that investment in knowledge, growth and diversification of green activity in the city will support the evolution of these sectors in the county as a whole.

As we have previously seen with life sciences, we can create a network of different specialised clusters across the county which are international significance and national importance. The challenge for the city council and its partners is to support the physical and psychological networks and exchange will allow this to happen.

Responsible movement of people and goods is a critical element of our economic strategy, it supports our global impact ambitions, and it enables a more inclusive economy by connecting residents to opportunity. It is however, in lowering emissions that we will be best placed to enable a step change in the city's environmental performance.

The Core Transport Proposals and Local Transport and Connectivity Plan will be at the heart of our plans to reduce congestion within the city and ensure that as the economy grows (and parts of the city become busier), there will be dramatically reduced environmental impact from this activity.

We want to innovate in the way we deliver our contribution to this and therefore have identified a range of interventions which will place Oxford at the forefront of innovation in green urban practices in the UK. these include:

- Implementation of Citizen Assembly recommendations
- Zero Carbon Oxford Partnership
- Roll out of low traffic neighbourhoods
- Low Energy Oxford (LEO) City Wide EV charging roll out
- City Wide Housing Retrofit
- Zero Emission Bus Roll-out
- City wide active travel supporting walking and cycling
- Develop local skills to deliver housing retrofit
- City council asset decarbonisation
- Reallocation of road space towards civic spaces, public realm, pedestrianisation.

Enabling Transition to a Zero Carbon Economy

Key

-  City Boundary
-  Zero Emission Zone
-  Major Roads
- Areas for Growth or Development**
 -  Northern
 -  West End & City Centre
 -  Eastern
 -  Southern

Building a Globally Significant Low Carbon Economy

- A Energy Systems Accelerator**
- B Automotive Innovation and EV**
- C Oxford North: Capacity for low Carbon Business**
- D Oxford Science Park: Discovery and Scaling**
- E Siemens**
- F Williams Technology & Innovation Centre**
- G Harwell Campus**
- H Bicester Eco Town**
- I Culham (RACE) Community autonomous vehicles**

-  Achieving Regional Agglomeration Through Knowledge, Investment and Scaling
-  Bus and Active Travel Corridor Improvements to reprioritise road space

Locally-led Innovation to Enable Low Carbon Economy

- 1** Zebra zero emission bus rollout
- 2** Rose Hill Low Energy Oxford Hub LEO
- 3** Osney Island LEO
- 4** Energy Superhub

Connected Autonomous Vehicle Trials

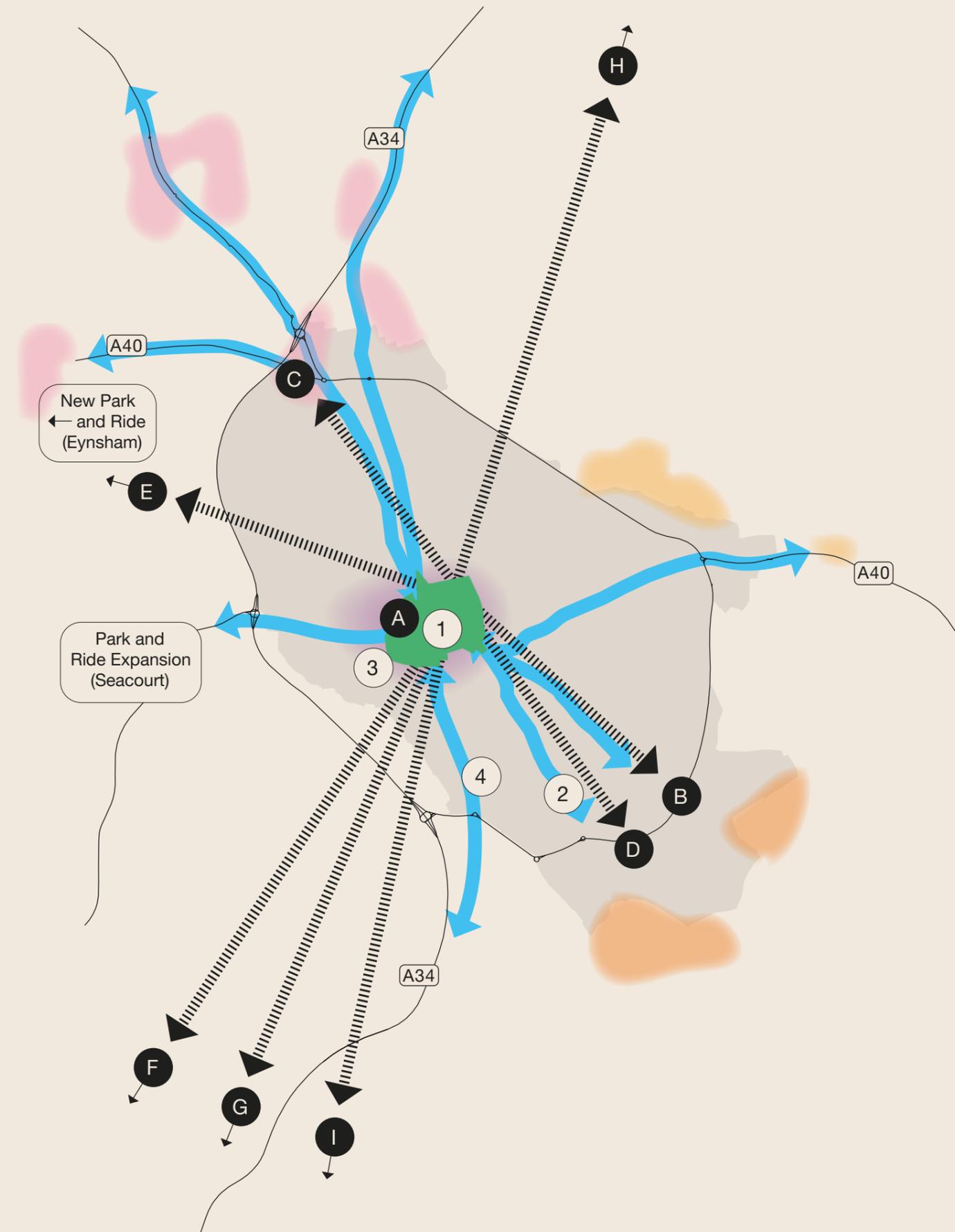
E-Cargo Bike Roll-out

Potential Delivery Consolidation Centre/s

By 2030

Oxford City Housing Ltd. At least 2,500 low carbon homes in the next ten years

Decarbonisation of City Council assets





Enabling a More Inclusive Economy

Issue and Opportunity

Whilst Oxford has a strong economy that is growing, the benefits of this are not shared equally. In a city with huge potential, where medical and technology breakthroughs are commonplace, too many residents struggle to make ends meet or participate in their local economy. Addressing this and enabling people to share in future success must be a priority of this strategy.

The scale of the challenge ahead is illustrated by the following:

- Around 10% of residents earn below the national real living wage (£9.50 p/h)
- The average attainment 8 (GCSE equivalent) score per pupil in Oxford is 45.9, below the national and Oxfordshire averages of 46.9 and 47.7 respectively
- Families need £16,000 per annum to avoid food poverty in Oxford. One in ten is not achieving this. 29% of children live in poverty, once housing costs are taken into account
- The difference in male life expectancy is 16 years for the top and bottom performing areas (St Mary's and North respectively)
- The difference in female life expectancy is 10 years for the top and bottom performing areas (Northfield Brook and North respectively)
- The average home costs around 15.03 times more than the average annual salary, the least affordable in the country
- Rental costs in the private rented sector are higher than the national average and most competitor cities
- Fuel poverty is a growing issue with rates higher rest of the County. This is likely to increase with sharp rises to energy bills expected in 2022.

Deprivation is most prevalent in the south and east (incorporating Littlemore, Blackbird Leys, Northfield Brook, Rose Hill and Iffley) where the net annual income is 15% lower than the Oxford average and 57% of neighbourhoods are classified as being in the top 20% most deprived in the country. These areas are also close to our identified areas for growth and development; linking residents to this opportunity is clearly critical.

The pandemic has exacerbated these issues, adding to the case for more fundamental intervention to support those residents who live in or close to poverty. These residents are less likely to have access to savings or the social networks to help them deal with and adapt to the crisis.

How we Define an Inclusive Economy

We define inclusive economy as “Growing prosperity that reduces inequality and is sustainable.” (Plymouth Inclusive Growth Group)

“An Inclusive Economy offers a genuine progressive conceptual frame in which greater consideration is given to social benefits that flow from, and feed into, economic activity. (CLES)

Our Response: Connecting People to Local Opportunities

The Strategy needs to be the foundation for new approaches which address the fundamental challenges that influence the wellbeing of people in the city. Oxford needs a more inclusive economy in which wealth is distributed across our communities and where all citizens can share the benefits of growth. This will require challenging traditional ways of working to guarantee a minimum standard of economic and social prosperity for all of Oxford's residents as well as developing local interventions aimed at giving communities more influence over their economic future.

Fundamental to this are the principles of Community Wealth Building; an approach which gives people more control over their local economy and explicitly takes action to retain wealth within localities.

Our primary response will be to work with partners (including Oxfordshire County Council, OxLEP, the University of Oxford and the Oxford Strategic Partners) to develop an Inclusive Economy Charter through the emerging Oxfordshire Inclusive Economy Partnership. This will build on the work that has been undertaken as part of the Inclusive Economy Seminar Series and aligns with the Oxfordshire Local Industrial Strategy aspirations.

This Charter will be a document that sets out commitments and standards that partners will sign up to pursuing as part of their day-to-day operations. It will include ambitions related to minimum standards of economic and social prosperity for residents related to themes like housing, income, employment, participation and democracy. It will set the basis for enhanced participation and a stronger commitment to grassroots economic activity. This builds on and expands the Oxford Living Wage programme.

The City Council's is committed to supporting delivery of affordable homes across the city as well as delivery enabling neighbourhood renewal projects which respond directly to specific local needs. Working with civil society partners, this will include improved participation, bringing people closer to the issues which impact upon their own prosperity and wellbeing.

Guiding Principles for an Inclusive City

A broad range of activities will be undertaken by partners as part of the Oxfordshire Inclusive Economy Partnership over the next decade. The City Council will drive forward these actions with partners. It is important to

note that an inclusive economy requires better access to decent, affordable homes. This of course is an over-riding priority that aligns with this strategy. Wider areas of focus to create a more inclusive city include:

- 1 Develop an Oxfordshire Inclusive Economy Charter and pledge scheme to engage all local business and institutions to play a fuller role in embedding an inclusive economy
- 2 Focus recovery efforts on the needs of the most disadvantaged places, through community wealth building and community economic development
- 3 Further develop and build on the Oxford Living Wage initiative (OLW) to embed the principles of a minimum standard of prosperity
- 4 Support social enterprise, co-operative businesses and civil society sectors, and pursue a more prominent role in the city's future economy
- 5 Support local spending, enhance local supply chains and generate social value through procurement.
- 6 Support local people to better access skills, training and education opportunities to help them prosper and adapt to the expected rapid structural changes to the economy
- 7 Deliver affordable workspace that supports local businesses and organisations providing security to stay in spaces and lower risks to growth
- 8 Explore using the principles of 15-minute neighbourhoods to give residents access to the services, practical and economic assets they need to participate in the economy and society
- 9 Explore options to deliver more affordable travel for local people to travel to employment and education using public transport, cycling and walking
- 10 Increase housing supply and improve access to affordable housing

More detail on how Oxford City Council and its partners will take these ambitions forward in the city is provided Delivery Plan.

Enabling People to Stay in the City and Access Opportunities

Crucial to supporting an inclusive economy is enabling a diverse population to live and work in the city and to be able to connect to good employment. This is not just about inclusivity and equality, it will mean that key-workers, graduates and support staff can stay in the city and continue to support our global city ambitions. To do this, we need to deliver thousands of new homes and to ensure that Oxford residents can easily, cheaply and sustainably move to places of work, education and opportunity.

We believe that increasing mobility is fundamental to a successful city economy. Improving connections through public transport and active travel, is a critical part of delivering a more inclusive city and connecting residents to the globally significant opportunities we will support in the city.

We recognise the importance of bus travel for a significant proportion of our population. We also acknowledge that currently active travel is not an option to link enough people to work and education.

It is currently too difficult to travel from some of our communities to areas of employment and education. We know that residents rely on buses, therefore public transport and active travel is a key part of our strategy.

We will work with Oxfordshire County Council to support vital investments such as Connecting Oxford to rapidly increase the accessibility between residential neighbourhoods and key employment areas by bus.

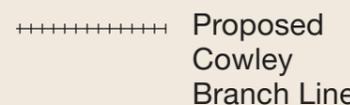
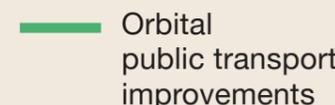
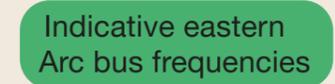
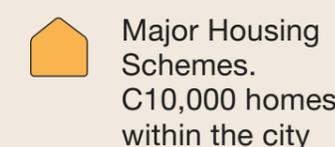
We will also seek to enable all of the economic growth nodes in the city to be linked to more deprived areas of the city by new walking and cycling routes.

Investment in transport and movement is accompanied by a 15 year plan to build 10,000 new homes in the city and 15,500 in our neighbouring growth areas, which will increase supply in the city and increase access to affordable housing for those who need it most.

This is not just about transport. Strong connections will also be enabled through digital accessibility and literacy. We will seek to improve education, access to devices, and technology to address the digital divide and further increase the opportunities for people to thrive in a Global City.

Enabling an Inclusive Economy

Key

-  City Boundary
-  Railway
-  Proposed Cowley Branch Line
-  Major Roads
-  Orbital public transport improvements
-  Indicative eastern Arc bus frequencies
-  Active travel to areas of employment
-  Major Housing Schemes. C10,000 homes within the city

Most deprived UK Neighbourhoods

Bottom 30% Nationally

Local Projects Supporting Affordable Housing, Neighbourhood Inclusion and Education

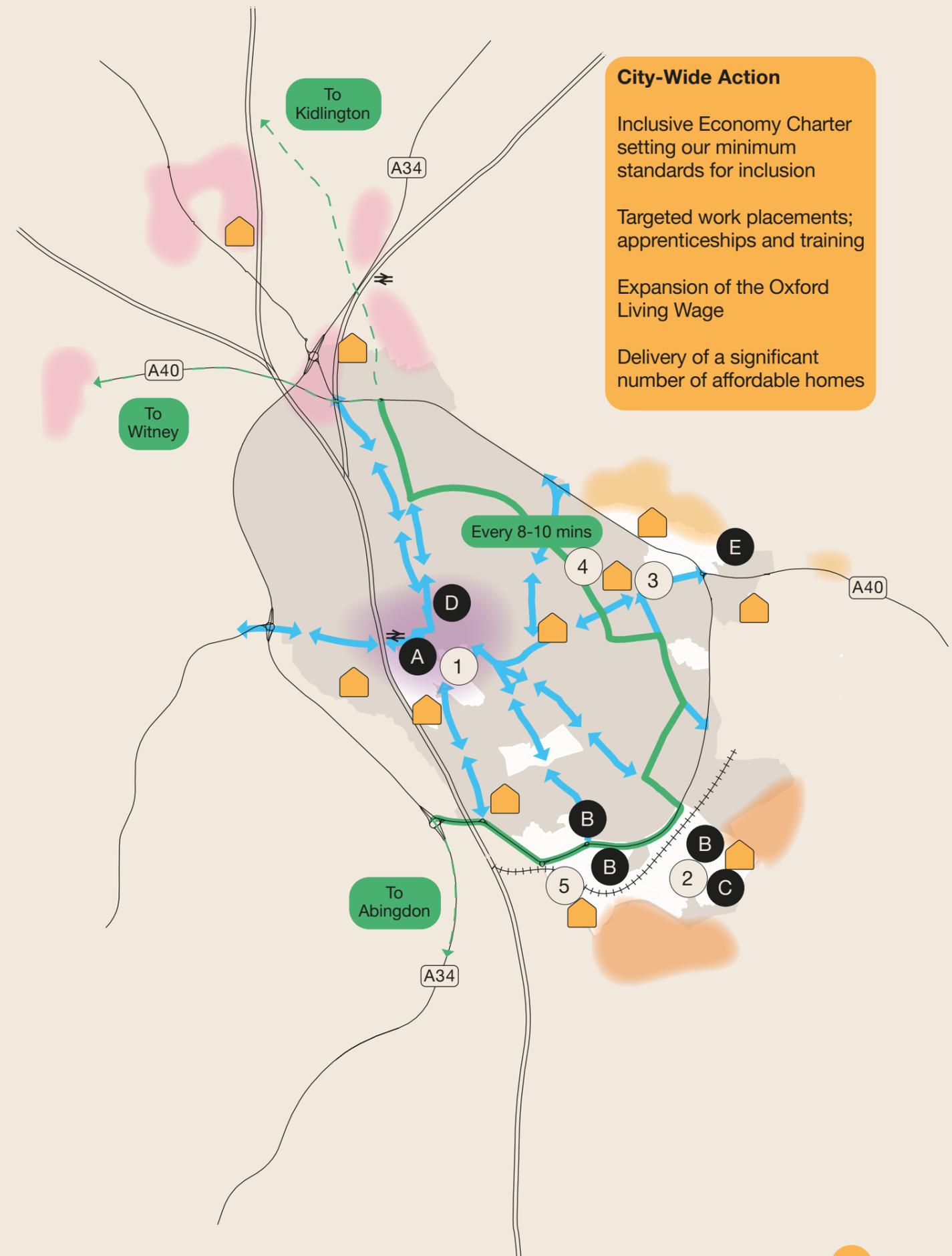
- A West End Developments** provide a significant number of affordable homes
- B New Community Wealth Building Innovation Pilot** in Blackbird Leys, Littlemore and Rose Hill.
- C Blackbird Leys District Centre** 300 homes, community centre and retail/employment
- D Summertown District Centre Scheme** 200 homes
- E Underhill Circus Neighbourhood Centre** Supporting a stronger local community centre alongside new housing

Areas for Growth or Development

- Northern
- West End & City Centre
- Eastern
- Southern

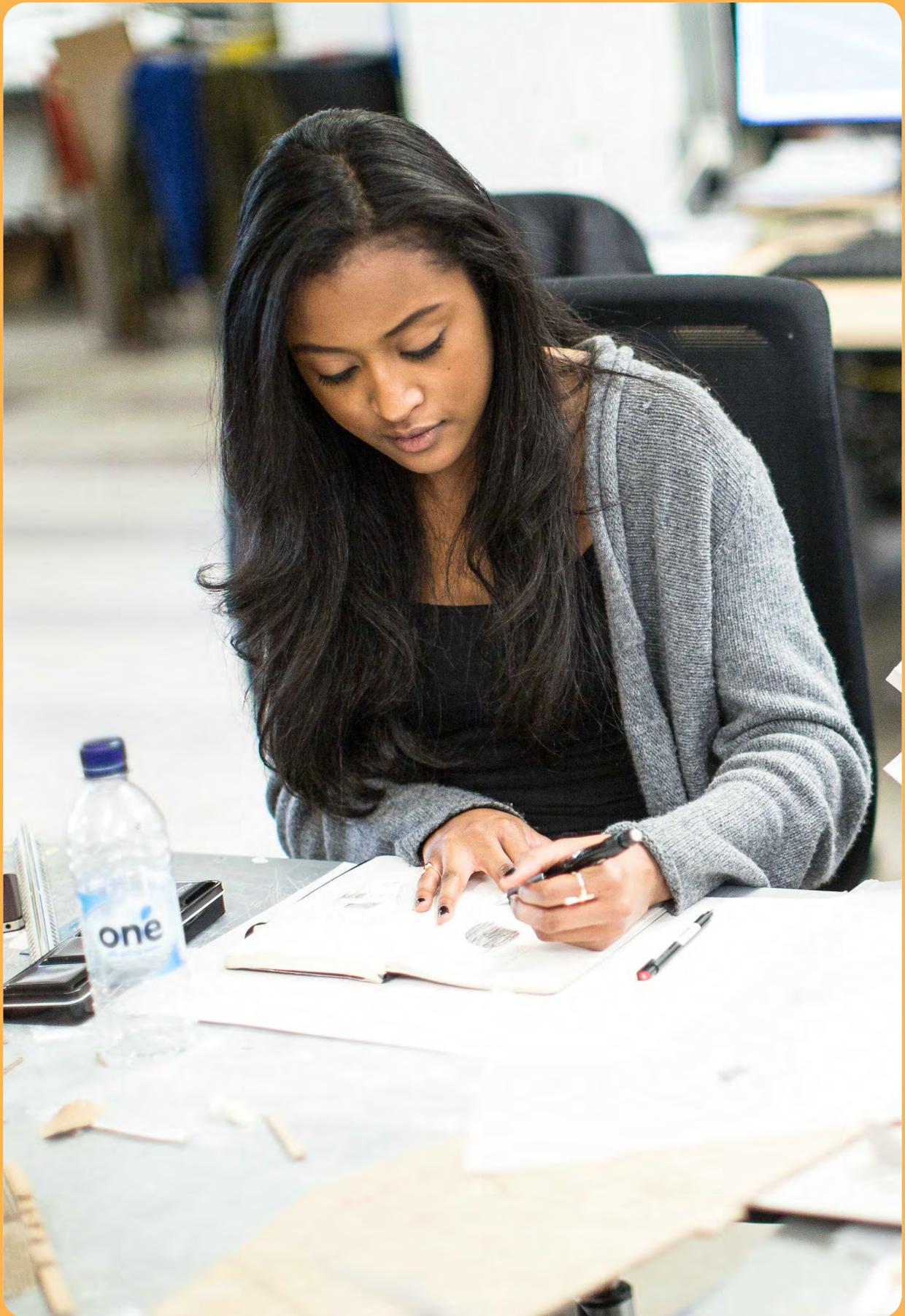
Technical Education

- 1 City of Oxford College
- 2 South Central Institute of Technology (Blackbird Leys)
- 3 Ruskin College
- 4 Oxford Brookes University
- 5 SAE Institute



City-Wide Action

- Inclusive Economy Charter setting our minimum standards for inclusion
- Targeted work placements; apprenticeships and training
- Expansion of the Oxford Living Wage
- Delivery of a significant number of affordable homes





Global Impact and Purpose

Issue and Opportunity

Oxford's role in answering the most prominent questions of our time will be key to economic opportunity.

More than any other city in the world, Oxford has become synonymous with the scientific response to Covid-19. A thriving economy at the forefront of the transition to Net Zero will benefit residents through new careers and opportunities, and support improved quality of life.

Oxford is uniquely placed on the world stage because it contains such a diversity of highly specialised individuals, University Departments, research teams and business. The ability to combine this knowledge is the City's key to competitive advantage. The city will lead the way in electric and autonomous vehicles, gene therapy, future fuels and the application of quantum technologies, to name a few. **If any area has the ability to demonstrate how it can leverage its economy to address pervasive social and environmental issues, it's Oxford.**

To capitalise upon these opportunities, we believe we need to clearly seek positive to achieve positive global impact from our local economy, encouraging purposeful business, attracting talent and enabling innovation. This will be about building upon the global city characteristics we already possess, and offer benefits for residents, workers and businesses;

Global influence the University of Oxford and Oxford Brookes produce world-leading research, and create new technologies and ideas, which shape global thinking and trends

A talented population around 60% of residents have a degree-level qualification

An open and diverse population around one third of the population was born outside of the UK and we are widely recognised as a tolerant and open place

A distinctive physical environment the city has a rich, unique character that should be protected and enhanced

World class culture Oxford has a rich mix of museums, galleries, universities, theatres, cinemas and culture

Through this focus on global impact, we can make a contribution to the global, national and regional economy. At the same time, this must support employment opportunities for local people.

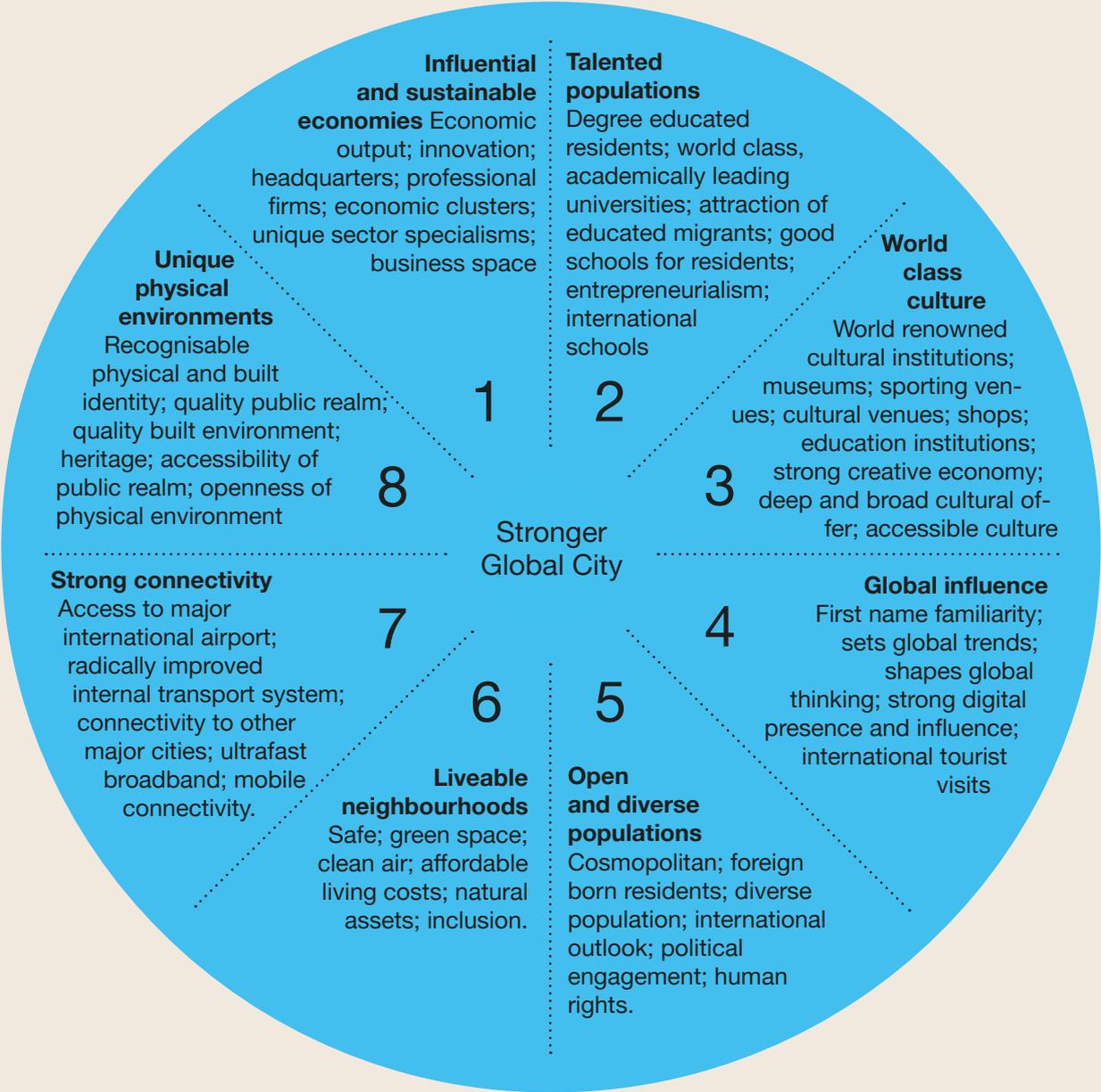
Actions set out in this strategy will help Oxford to better harness its real potential, and to be recognised as a successful compact global city with a powerful and influential economy. The city's small size can be an advantage to achieving these ambitions and benefits because it:

- Gives stakeholders including residents more influence to curate and shape a dynamic economy.
- Allows the public sector to better show leadership on core challenges of inclusion, workspace and connectivity.
- Provides a 'living lab' setting which allows partners to experiment and scale ideas that overcome challenges across energy, carbon reduction, and mobility.

Our Response: Embracing Global City Characteristics

Being a global city is not about size. It relates to factors like influence, power, accessibility, status, liveability and sustainability. Using a range of sources² eight core global city characteristics have been identified. These are

displayed below alongside related factors. Focusing upon a 'impactful and purposeful economy' we will use these as a checklist to help us build the diverse and open economy we want for Oxford.



2. Chicago Council on Global Affairs; AT Kearney's Global City Index; Mori Memorial Foundation Global City Index; the Economist Intelligence Unit's Global City Competitiveness Index

Guiding Principles for a Global Impact

We want Oxford to become a more resilient and more influential global city and, most importantly for this strategy, develop a more purposeful and influential economy. This will help Oxford become more productive, competitive and investable.

Areas for action to help Oxford to become a more influential global city economy are:

- 1 Increase the quantum and quality of commercial space on the city's planned and existing sites, with a focus on supporting Life Sciences, Low Carbon, Digital and knowledge driven sectors
- 2 Deliver transport, digital and energy developments that unlock economic opportunities for diversification and innovation in identified growth areas
- 3 Seek to build on Oxford's global competitiveness in higher education and research, also enhancing further and technical education
- 4 Continue to support businesses to adapt to changing economic conditions, embedding principles of good recovery over the medium term
- 5 Help deliver Oxford West End at pace as an internationally significant neighbourhood, attracting talent and investment
- 6 from socially responsible and purposeful businesses in target sectors in line with this strategy
- 7 Retain a greater proportion of spin out companies that start up in the city and increase the local economic value of knowledge and innovation
- 8 Support the recovery of the visitor economy and seek benefits for visitors and residents
- 9 Attract and retain more skilled international workforce, celebrating the cultural diversity this brings

Oxford's Significant Specialisms

Oxford is already known for globally significant knowledge-based sectors, but more can be done to support higher value sectors to expand and develop. Our science and knowledge economy is unique in its diversity and importance. Life Sciences, Space, Robotics and Materials are all global leaders.

This strategy seeks to provide balance between supporting high value science and more accessible sectors for employment. There are four specific sectors that will be prioritised as part of this strategy. These represent activities with competitive advantages and are areas where Oxford can become or can continue to be a leader on the global stage:

- 1. Health and Life Sciences:** Includes a whole range of life sciences enterprises including drug discovery and development, diagnostics, medical devices, digital health, precision medicine and regenerative medicine
- 2. Technology and Digital:** Includes businesses providing IT, software services and digital applications across a range of sectors
- 3. Creative Production:** Includes a diverse range of activities including publishing, marketing and branding, architecture, crafts, design, fashion, film, theatre, radio, arts and museums
- 4. Green and Low Carbon:** An array of businesses spanning environmental activities, renewable energy, energy storage and low carbon activities in sectors including automotive and transport.

This focus aligns with the Oxfordshire LIS and Oxfordshire Science and Innovation Audit, which include ambitions to support the region to become a leader in the development of transformative technologies that will underpin the future economy and provide a lasting global competitive advantage.

Priority technologies identified, which cut across the sectors set out above, include **digital health, autonomous vehicles, quantum computing, fusion technology, cryogenics and space.**

Pursuing these sectors will enable Oxford to develop a more influential, innovative and productive economy. They are also high growth industries nationally, so will help create new employment opportunities for Oxford's residents.

The table below provides a brief overview of the drivers, existing assets and future opportunities for these sectors in relation to Oxford. Here, we also recognise the importance of the **visitor economy** in helping us welcome the world to Oxford and further enhance our reputation for history and culture.

Our rapidly growing cohort of socially responsible businesses will drive solutions to the pervasive social and environmental challenges we face. We want to embrace and support creative solutions.

Oxford is already the first B Corp, "B Local" and Social Enterprise County in the UK, in recognition of our leading involvement in these important business models. We will seek to build on this huge potential making this a hallmark of the new economy in Oxford.

Priority Sectors

Sector	Drivers and Trends	Example existing assets	Future opportunities in and around Oxford
Health and Life Sciences	Increasing public health expenditure; ageing population; COVID-19; breakthrough technologies in drug discovery, diagnostics, medical devices, digital health, precision and regenerative medicine. Oxford has a role delivering the Government's Life Science's Vision	<ul style="list-style-type: none"> • Oxford Science Park • John Radcliffe Hospital • Oxford University Science Quarter • Churchill Hospital 	<ul style="list-style-type: none"> • West End Innovation District • Warneford Hospital • Headington Global Health and Life Sciences Quarter • Oxford Science Park & South Oxford Science Village • Oxford Business Park expansion
Technology and Digital	5G technology; increasing demand for e-commerce; artificial Intelligence; big data, quantum computing development, automation materials and nano-technology	<ul style="list-style-type: none"> • Oxford Business Park • Oxford Science Park • Oxford Centre for Innovation • Oxford City Centre 	<ul style="list-style-type: none"> • West End Innovation District • Oxford Business Park expansion • Oxford North development • Oxford Science Park • Begbroke Science Park
Creative Production	Rise in e-commerce providing new opportunities; technological innovation increasing productivity and possibilities (e.g. 3D printing); growth in creative and cultural consumption	<ul style="list-style-type: none"> • Oxford City Centre • Osney Mead • East Oxford • Makespace Oxford 	<ul style="list-style-type: none"> • Creative and digital industries hub • Red Hall at Oxford North • Covered Market redevelopment • West End Innovation District

Sector	Drivers and Trends	Example existing assets	Future opportunities in and around Oxford
Green and Low Carbon	Climate emergency; energy security ; shift in consumer sentiment; Government Policy; University research technology and innovations in renewables, grid technology and battery storage	<ul style="list-style-type: none"> • Oxford Science Park • Oxford Centre for Innovation • Osney Mead Industrial Estate • Project Low Energy Oxford 	<ul style="list-style-type: none"> • Oxford North development • West End Innovation District • Oxford Science Park (expansion and 2030 Net Zero ambition) • Begbroke Science Park expansion building retrofit and re-use
Visitor Economy	Already a successful and attractive destination with strong resilience. Ongoing strength of UK as an international tourism location post pandemic. Potential opportunity limited by the size and capacity of the city.	<ul style="list-style-type: none"> • Heritage offer • Cultural resonance and strong local offer (film, TV, literature, music and theatre). • Access to waterways and green space city-wide and nearby Cotswolds 	<ul style="list-style-type: none"> • Support more systematic entry level jobs and career progression in the sector • Create more hotel capacity for higher value overnight stays • Drive innovation in sustainable tourism and support new attractions in-line with Local Plan
Social enterprise and co-operative businesses	Rapid growth in social enterprise, entrepreneurship and purposeful business in response to societal challenges and inequalities. Oxfordshire is the UK's first Social Enterprise Place (Social Enterprise UK).	<ul style="list-style-type: none"> • Neighbourhood Centres • Oxfordshire Social Enterprise Partnership (OSEP), OSEP Hubs, Makespace at Aristotle House, Community Centres, Common Ground Cafe. • Oxford Hub • High volunteering • Philanthropy 	<ul style="list-style-type: none"> • Use of publicly owned spaces; Meanwhile space, Participatory activities linked to new developments; Enhanced ESG commitments; 'New Workspaces' in city centre and neighbourhood centres

Oxford: An Emerging National Rail Hub

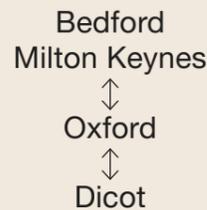
Successful global cities are well connected, not only internationally, but also locally. Reliable and comprehensive public transport should be seen as much as part of the economic strategy as they are to transport policy. Big investments in growth areas such as the West End, Oxford North, Oxford Science Park and Oxford Business Park require better, more sustainable connectivity. The city itself cannot achieve the benefits of agglomeration and exchange of ideas if people cannot physically connect.

Connecting Oxford via bus and regional and national rail connections will be critical for the city to maximise its contribution to the UK's economic recovery and diversification. Investments in the Cowley Branch Line and proposed east-west rail routes become fundamental for Oxford as a global city, placing us at the centre of a network of transport which extends regionally and nationally. Regionally, Oxfordshire Connect Rail Programme will support connections to the city which create a more efficient and accessible sphere of influence.

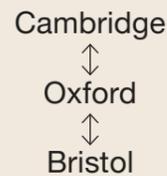
East West Rail 1 extension



East West Rail 2



East West Rail 3



Cross Country

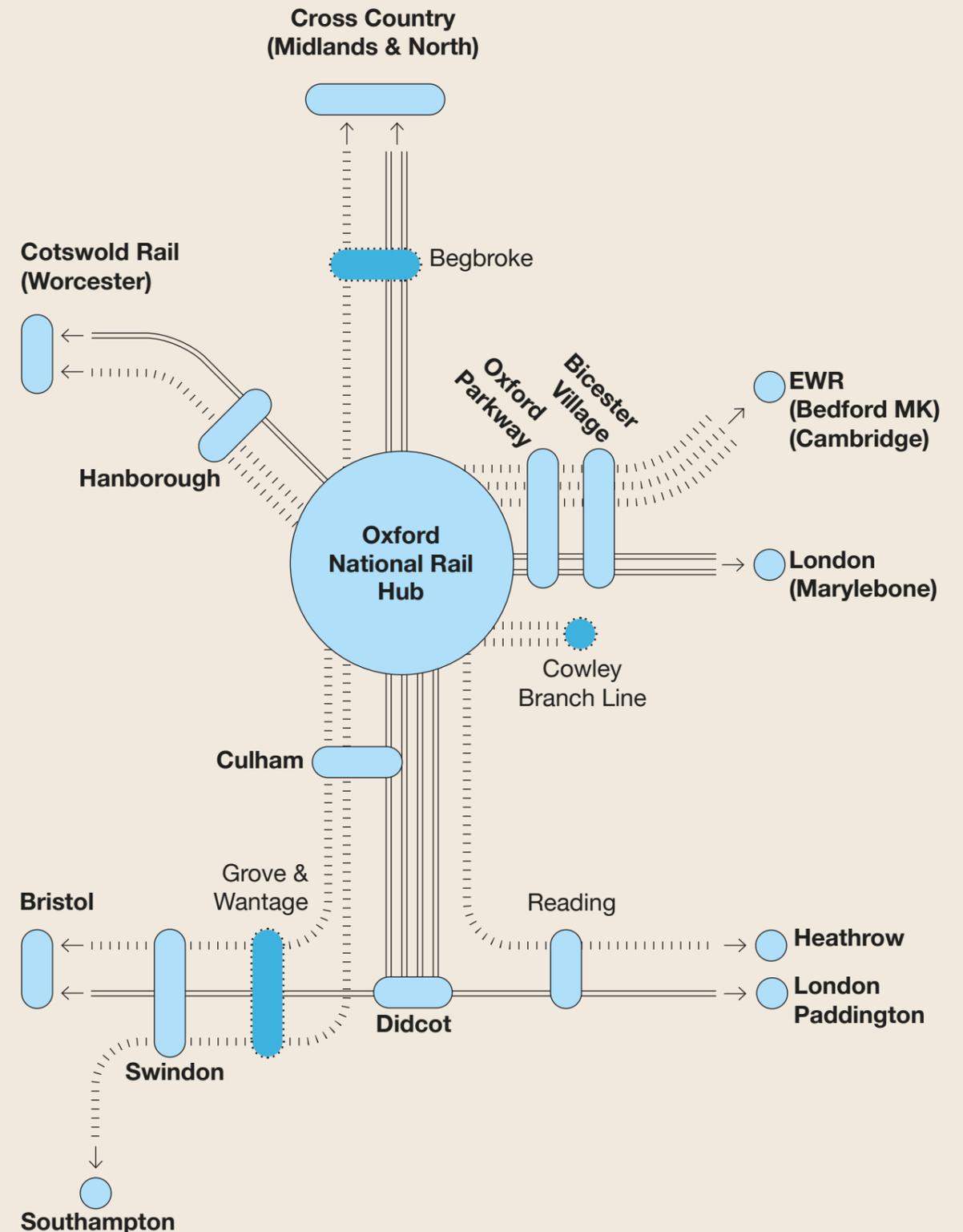


Cotswold Line



Key

- Current rail Network
- Future additional rail development
- Proposed new transit interchange hubs
- Existing interchange hubs



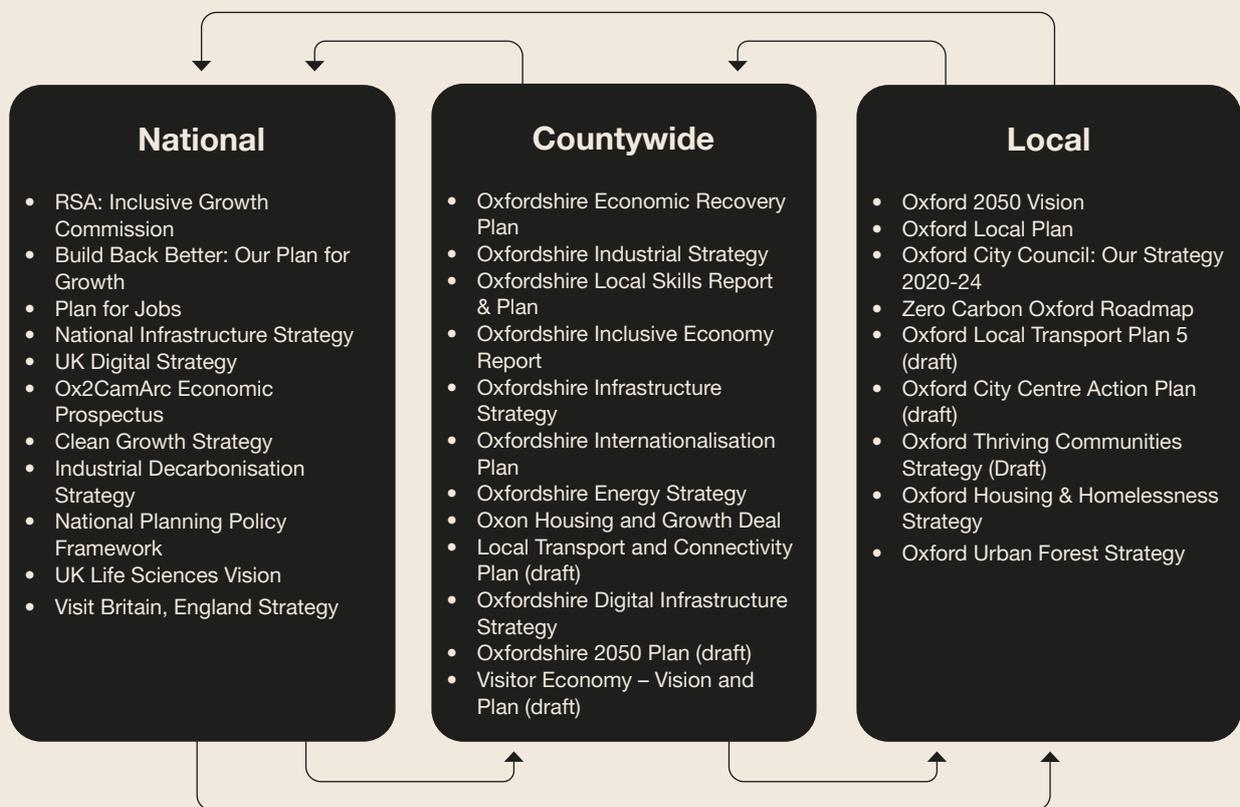


The Delivery Plan

Vitally, this strategy is accompanied by a Delivery Plan, to guide action on priority projects, and exploration of new ideas. Alongside the evidence base, this provides a more detailed practical approach to support the delivery of this strategy. It includes:

- Focussed plans for employment and commercial space, the City Centre and the Visitor Economy
- Delivery principles
- A detailed action plan for the next five years of delivery
- Roles and responsibility for delivery
- Approaches to measurement and the triple bottom line
- To support initial delivery in three important areas, three focus areas have been identified to support initial activity. These are creation of more of the right commercial spaces; development of focused plans for the city centre; and positive evolution of the the visitor economy.

This strategy does not exist in isolation. Its influence is wide and as such, needs to be considered in conjunction with other strategies:



Focus on: Space for Growth and New Ideas

Making Oxford a more impactful global city and ultimately, the UK a more successful economy, is dependent upon the delivery of more commercial space in the city. We must do this in a way which does not compromise our wider placemaking, zero carbon and sustainability and green and sustainability objectives, but at pace in that will meet business needs. Space in the city is constrained so we need to plan pro-actively to intensify and make more efficient use of employment sites allocated within our Local Plan, ensuring key policies around energy, materials, sustainable travel and bio-diversity net gain are optimised.

Whilst other cities have seen demand for commercial space reduce, the Oxford market has proved resilient to the impacts of the pandemic and Brexit. Whilst the trend of flexible and hybrid working and office rationalisation is in evidence, this is tempered by poor, low quality stock, and heightened demand for flexible and lab space (accounting for 50% of transactions in 2021 according to VSL & Partners) Efficient use and re-use of existing assets is a priority as well as sustainable development of our allocated sites. According to VSL (2021), lettings have remained consistent whilst rents have increased by as much as

46%. Bidwells estimate c.75% of all lease activity is from knowledge sectors, with demand for science and technology space remaining unfulfilled, suggesting that a lack of suitable lab, R&D and flexible office space remains the one of the biggest barriers to growth within Oxford.

Our ambition is to provide a rapid and significant uplift in good quality space through planned sites and redevelopment of existing sites, to enable higher value sectors (see page 22/23) to grow and expand, while also providing more affordable space for small businesses in target sectors, as well as important civil society activity and social or co-operative businesses.

Three strategic principles are accompanied by a series of concrete actions that the City Council will deliver (as landowner, planning authority and enabler), alongside wider landowner, development and economic partners, will deliver. These are set out in detail in the Delivery Plan document.

Significantly increase the quantity of commercial space around the city

- Continue to support the evolution of employment sites such as Oxford Business Park and Oxford Science Park to best meet the needs of an evolving market. Oxford's Science Parks contributed £500m to the economy in 2018/19. These locations allow grow on space for those companies that have been incubated locally. Oxford Business Park and Science park already host 150 companies with c6,000 employees and have significant capacity to be utilised.
- Bring forward the West End Innovation District at pace, as a major business district for the city and the UK
- Support good quality workspace across the city for small businesses, start-ups and innovative businesses (including university spin outs)
- Focus on meeting the requirements of the Health & Life Sciences sector (e.g. Lab, R&D and office space) in Oxford Science Park, Oxford Business Park, Headington, the Northern Gateway and West End
- Focus on meeting the requirements of Green and Low Carbon Sectors (e.g. Lab, R&D and office space) in the West End and Northern Gateway

- Recognising the role that new spaces can play in supporting the evolution of local neighbourhoods and district centres. (e.g. office and co-working space) across the city

Rapidly enable space for businesses to experiment and test ideas

- Explore opportunities with land-owners for affordable meanwhile space within the city centre
- Encourage testing of new ideas by creating more affordable space in neighbourhoods, using public sector assets and more flexible leasing to support new entrepreneurs
- Identify the potential for conversion of existing buildings and spaces to address the shortfall in science, technology and lab space in the short to medium term
- Support the delivery of new meanwhile workspace in the West End as a precursor for the Innovation District

Prioritise city centre workspace for small and creative businesses

- Focus on understanding and meeting the evolving requirements of Creative Production and Low Carbon (e.g. studio and makerspace) and Technology & Digital sectors in the city centre (e.g. co-working and office space)
- Ensure sufficient quantum of affordable space is available to meet the needs of businesses in these sectors and others that will help diversify the local economy
- Innovate with publicly owned city centre assets to provide more flexible and progressive leases

to support inclusive economy ambitions

- Explore the potential of affordable workspace policy in planning to support creative activity, social enterprise and co-operative businesses

Create flexible policies that support new models of workspace

- Test new planning policies related to retail units and business rates to support small businesses use underutilised spaces if and when these become available

Focus on: Oxford City Centre

A strong city centre is fundamental to the successful evolution of Oxford and its surrounding area. We want the centre to evolve and adapt to emerging trends, to enhance and extend its global reach and reputation, becoming more relevant and accessible to the broader range of our local communities.

Our City Centre is one of the most important in the world. History, culture, architecture, commerce and innovation combine in a unique way which is central to the city's success. The evolution of the West End, the opportunity transition to zero carbon post Covid 19 and the resilience of Oxford's property market all provide reasons for optimism. The Oxford Local Plan 2036 includes a policy for the West End and Osney Mead, which promotes regeneration of the area for, high-density urban living together with a mix of uses. The City Council is working with master-planning consultants to develop the West End Spatial Framework to provide detailed advice and guidance on principles for its development. It will provide a strategic framework, which will help to co-ordinate infrastructure, connectivity and transport together with public realm provision, design and a balanced mix of uses.

There is a need to address challenges of congestion, affordability and lack of green space to ensure the city achieves

its potential. An accompanying City Centre Vision and Action Plan has been created to enable this to happen. This has the following objectives:

- Diversify uses in the heart of city by building and repurposing to achieve a critical mass of new places to live and to work, and in doing so, increasing the numbers of people regularly using our amenities subject to demand
- Support the best of our retail, hospitality, leisure and services offer, helping our shops, pubs, bars, restaurants, and services and leisure sector businesses and organisations, to recover and evolve, while ensuring vacant space supports a new wave of business growth and jobs
- Encourage the growth of more economic sectors, including science, tech and creative, helping to attract and retain more talent to work in the city centre because of its amenities, alongside its educational, historic and cultural connections
- Celebrate our outstanding heritage assets, through improved access, sensitive adaptation and retrofit, as well as better public realm, creative lighting and interesting new uses and activity
- Reduce traffic congestion by limiting those driving through,

rather than to, the city's residential areas, destinations, institutions and businesses to create a better city centre environment

- Facilitate investment in a world class public transport network, working with the bus and rail industries to support improved gateways, interchanges and connections, plus faster, more reliable journeys into and through the city centre
- Prioritise investment in and development of a range of new delivery and collection options including electric, pedal-power and more
- Deliver better walking and cycling infrastructure, capitalising on the city and city centre's human scale and accessibility, and responding to the existential threat of the climate emergency
- Create new civic spaces, so people can meet, dwell, relax and celebrate together, while reimagining our streets as safe social spaces, through both commercial and performance activity
- Promote and facilitate more overnight visitor stays, increasing their enjoyment of our city, while maximising the contribution to the local economy
- Strike a balance so that we manage tourist visits more effectively, ensuring greater levels of visitor satisfaction and

increasing return trips, while making the city function better for residents, students and the city's workforce going about their day to day lives

- Improve air quality, create more green space, and improve access to our waterways to support physical and mental health and Oxford's city centre as an even more attractive destination
- Strengthen the feeling of safety in the city centre through the work of the Council's Safer Oxford team, Thames Valley Police, Oxford Community Safety and City Centre Crime Partnerships

In the short term, we have created a set of actions to address immediate challenges, animate and change perceptions of Oxford City Centre. These are:

1. Connectivity and Access

- Deliver Connecting Oxford
- Zero Emission Zone
- Oxford Station Masterplan
- Improve Oxpens and Osney Mead Connectivity
- Last mile logistics
- Visitor coach strategy
- Park and ride improvements

2. Public Realm and Animation

- Public realm improvements
- Shopfront design improvements
- Outdoor seating initiative
- Public realm and movement framework

3. Getting the mix right

- West End Innovation District
- Target and reduce vacant units
- Evolve the covered market
- Change of use application strategy
- Increase and diversify workspace
- Stimulate night time economy
- Brand and promotion

4. Getting the Basics Right

- Homelessness and Rough Sleeping
- Street scene management
- Tourism management
- Reducing crime and antisocial behaviour

Focus on: Evolving Oxford's Visitor Economy

Oxford's visitor economy is already internationally significant, contributing around £988m to the economy every year. Welcoming visitors from around the world is a priority as is meeting the needs of local residents, who are also a vital contributor to the success of the visitor economy. The ambition is to improve the experience and to maximise the positive economic impact of tourism by encouraging longer stays. Six strategic principles to guide delivery are set out below, with more detail set out within the Delivery Plan document.

Increase overnight stays from international and domestic visitors

Experience Oxfordshire has shown that 85% of the 8 million annual visits are day trips with just 15% being overnight stays. These overnight visits, however, generate 60% of visitor spend so there is an economic imperative to increase the duration of visits.

It is therefore, important that we provide more accommodation and a night time offer which encourages people to stay in Oxford for longer. This links to our City Centre Vision and Action Plan . Practically, the roll out of the Oxford Pass, will help link key elements of our offer and support longer stays

Enhance the tourism offer to encourage and enable exploration

Oxford has a strong base of tourist-attractions centered around the university, colleges, cultural institutions and other heritage assets. To remain competitive, the city will need to assess, diversify and improve the offer in terms of modern amenities, innovative art, music events, work-related conferences, restaurants, hotels and transport options.

Again linking to the City Centre Vision and Action Plan, we will improve movement around the city, but also develop a network of visitor nodes, whether these are for tourists, business visitors or local cultural consumers.

Spread the tourist season throughout the year to decrease the impact of seasonality

Like most cities, Oxford's visitor economy experiences significant fluctuations in tourist numbers throughout the year. More can be done to decrease the impact of this on the sector, such as hosting more events, attracting different types of visitors and diversifying the offer.

More diverse programming, reflecting cultural diversity and a broader range of activities through festival, events and fringe activities will help

to amplify existing activity and generate new content.

Enhance tourism management to ensure visits achieve a balance between impact and economic contribution

Oxford has long-been a popular destination for tourists, but over time the number of visitors, especially short-stay day trips via coaches, has created congestion and challenges for the city. It is vital that residents, too, can enjoy their city. There is therefore a need to improve the management of tourist visits in a number of ways including in relation to visitor coaches, digital apps, tourist information, wayfinding and spreading visitor tour groups.

In the short term the City Council, Ox-LEP and Experience Oxfordshire will need to respond effectively to ensure both the city and the county benefits from the government's Destination Management Organisation Review.

Support the tourism sector to recover from the impacts of COVID-19 and the recession

COVID-19 has resulted in an unprecedented health and economic challenge across the world with particularly acute impacts on tourism and visitor travel. The impacts to the visitor economy have been deep and these impacts are likely to continue in the short-to-medium term as governments try to limit the spread of the virus, loosen restrictions and maintain social distancing.

Given the importance of the sector to Oxford's economy, it will be important to support the sector to safely re-open, restart and diversify.

The Oxfordshire Economic Recovery Plan sets out a programme of support for visitor economy businesses. This includes new promotion, digital support help to manage visitors and guests in the context of social distancing. Key county-wide initiatives including Visitor Economy – Vision and Action Plan for Oxfordshire, 2022-24 and Visitor Economy Renaissance Programme 2022-24 will support recovery efforts.

Develop employment and skills pathways to support local careers

Develop appropriate education provision and partnership structures which help support local residents to progress into potentially lucrative careers in hospitality and tourism. This includes recognising and celebrating the diversity of employment within the sector and connecting to the Oxford's growing technical education offer, to support lifelong career development.

Case Studies

The success of Oxford's Economic Strategy will rely on concerted efforts and actions by partners city-wide. As explained on Page 9, we are building on momentum with a sustainable and inclusive approach. The case studies below demonstrate that approach being taken seriously and delivered in practice. We plan to build on this over the next ten years, working with partners and stakeholders city and county-wide, to create a greener, fairer economy with global impact.

Case Study 1

Inclusive Economy Partnership



What is it?

The Oxfordshire Inclusive Economy Partnership is a group of major local employers and third sector organisations, joining forces to tackle issues of inequality in Oxfordshire

Why are we doing it?

By joining forces and mobilising the resources, skills and local knowledge of partners, we will be able to greatly increase the impact and reach of the work to build a more inclusive economy.

How are we doing it?

The partnership brings together more than 100 organisations, working across four distinct areas. These working groups are developing and amplifying best practice on the topics of Inclusive Employment, Educational Attainment, Delivering Social Value through Procurement, and Place Based Interventions

Did you know?

Any local organisation will be able to sign up the 'Oxfordshire Inclusive Economy Charter' and pledge to address inequality in their own way.

Case Study 2

Meanwhile in Oxfordshire

What is it?

The Meanwhile in Oxfordshire project is seeking the transformation of vacant retail units and commercial premises into affordable spaces for more than 100 organisations, including independent shops, cultural venues, creative studios and co-working spaces.

Why are we doing it?

As well as reducing the number of vacant units in the county's high streets, the Meanwhile in Oxfordshire project is diversifying the offer in Oxfordshire's town and city centres as entrepreneurs devise new and creative uses for the units, encouraging more visitors to the high streets. It aims to provide more affordable space wherever possible.

How are we doing it?

Meanwhile in Oxfordshire is delivered through Makespace Oxford, working in partnership with Oxford City Council, and Cherwell, South Oxfordshire, Vale of White Horse and West Oxfordshire District Councils. It is funded by the Government's Getting Building Fund, secured through OxLEP.



Did you know?

25,000 sq. ft. of space has already been secured by the project team. The project will create or secure at least 300 jobs across Oxfordshire

Case Study 3

Owned by Oxford

What is it?

Owned by Oxford is a partnership of local organisations using the principles of Community Wealth Building to create a fairer, more people-centred local economy where wealth, power, and opportunity are shared more widely.

Why are we doing it?

The project seeks to deliver a more inclusive local economy by piloting a community-led approach to economic development in the city. It does this by supporting the development of resilient community-owned and cooperative businesses in economically deprived areas of Oxford.

How are we doing it?

Led by CAG Oxfordshire, the project works in partnership with Oxford City Council, Makespace, Aspire, the Solidarity Economy Association and Cooperative Futures.



Did you know?

Cooperatives are highly resilient to economic shocks, and were four times less likely to cease trading in 2020 than other forms of enterprise

Case Study 4

Kickstart 16-24 work placement scheme

What is it?

As part of the Re-start phase of COVID-19 Recovery, Oxford City Council's Economic Development Team acted as a gateway for the Government's 'Kickstart scheme' to support employers and the unemployed to benefit from the scheme across Oxfordshire.

The logo for the Kickstart Scheme, featuring the word "KICKSTART" in a large, bold, sans-serif font with a stylized underline, and the word "SCHEME" in a smaller, bold, sans-serif font below it.

Why are we doing it?

As unemployment spiked during the Pandemic, there were fears this would impact the youngest most. The Kickstart Scheme provided fully funded work placements any qualifying employer for 6 months, 25 hours per week for 16-24 year olds referred from DWP as part of the scheme because they are on Universal Credit or long term unemployed.

How are we doing it?

Salaries are paid by DWP for placements at minimum wage although many employers topped up the salary at their own expense to pay Oxford Living Wage (OLW). All employers receive a grant per placement of £1500. As a Gateway provider, Oxford City Council offered a range of support to the SMEs that took on work placement through the programme to help ensure success for business and employees alike.

Did you know?

We secured and authorised 137 placements under the scheme, creating new jobs for 71 young people and providing participating employers with to date £344, 685.91

Case Study 5

Oxford Energy Superhub



What is it?

A World-First Low-Carbon Mobility, Electricity and Heat Energy Superhub

Why are we doing it?

Energy Superhub Oxford combines a number of innovative technologies and integrates these to deliver more efficient, cheaper and greener energy solutions. As a key part of Oxford City Council's response to the climate emergency, ESO will provide a model for cities around the world to cut carbon and improve air quality.

How are we doing it?

We're doing this by installing a very large, hybrid battery energy storage system, enabling more clean electricity, encouraging the uptake of electric vehicles (EVs) in Oxford, including the electrification of the Council's own fleet of vehicles, and by implementing electric heating in homes and businesses.

Did you know?

Energy Superhub Oxford (ESO) aims to eliminate 10,000 tonnes of CO2 emissions a year. That's the equivalent of taking 2,000 cars off the road.

Case Study 6

The Energy Systems Accelerator

What is it?

The Energy Systems Accelerator pilot – better known as Mini TESA – is a world-leading multi-disciplinary hub, championing technical and services innovation in the energy systems transition. The hub is based at Osney Mead in Oxford and began operating in Spring 2022.



Why are we doing it?

By facilitating industry and academic collaboration across all energy sectors (electricity, heat and mobility), new approaches to the energy transition will be accelerated and deployed at scale. This will drive innovation in low carbon technologies and services nationally and internationally, helping to ensure the UK meets its legally-binding carbon targets.

large-scale ‘SPRINTS’, where many stakeholders can come together to discuss underlying issues to the energy transition.

Did you know?

At the next stage, 800 people from a broad spectrum of professional backgrounds will work to make the energy systems transition happen in the most efficient, sustainable and equitable way possible

How are we doing it?

Mini-TESA houses two University research groups, the Low Carbon Hub (a social enterprise), and a team from Scottish and Southern Energy Networks (the local distributor). It houses the University’s MSc in Energy Systems, has hot-desking spaces, and has a facility for hosting

Case Study 7

OFAS Scheme

What is it?

The Oxford flood alleviation scheme is one of the biggest flood schemes currently planned in England.

Why are we doing it?

The scheme will safeguard Oxford's reputation as a thriving centre that is open for business. Everyone who lives, works in or visits the city will benefit from the reduced flood risk to the railway and the Botley and Abingdon roads. There will also be fewer flood related electricity, telephone and internet disruptions to homes and businesses.



How are we doing it?

This ambitious project is made possible through central government funding and local contributions. These include The Environment Agency, Oxfordshire County Council, OxLEP, Oxford City Council, Thames Regional Flood and Coastal Committee, Thames Water, National Highways

Did you know?

As well as protecting homes, businesses and infrastructure, saving £1.4Bn over 100 years, OFAS will create a unique wetland habitat of 20 hectares.

Case Study 8

Oxford West End

What is it?

Oxford's West End is once in a generation opportunity for Oxford - to create an inspiring and inclusive innovation district within the city centre, set along the banks of the River Thames. Oxford West End consists of a number of key sites that, alongside the character of existing neighbourhoods, have the potential to complement each other and add up to a compelling mix of uses, characters, activities and public amenities.

Why are we doing it?

The West End is a key opportunity to deliver new employment space and homes accelerated by the proposed transformation of Oxford station into a national rail hub.

The creation of this new sustainable urban neighbourhood will expand and enrich the city centre offer, and serve as the gateway to the wider region where new technologies are pioneered and commercialised across a huge variety of industries.

The West End will become a piece of city for everyone. It will be a place where the world's best ideas and Oxford's extraordinary breadth of talent converge, taking Oxford's success to the next level.

How are we doing it?

The local partners we have established strong governance to drive forward this ambitious programme.

We have also raised significant local revenue to progress the vision, invest in the spatial framework and Oxford station masterplan, produce this prospectus, and prepare a strategic

business case for investment. We have also recruited new staff to progress the coordination of the West End programmes.

Oxford City Council is now developing a masterplan framework and Supplementary Planning Document (SPD) for the West End, which will include these sites, but also cover a wider area. It is also likely that other sites will come forward over time.

Did you know?

Oxford West End will provide 260,000 sq. ft. of employment space and 1,850 residential and student accommodation units, and offer a cost benefit ratio of 4.3:1 for the required investment.

Case Study 9

Workspaces at Cave St and George St



What is it?

These initiatives deliver more than 25,000 sq. ft. of newly refurbished entrepreneurial workspace across two sites in central Oxford.

Why are we doing it?

Built in phases, these workspaces will help meet the pressing need for a greater quantity and quality of flexible and affordable entrepreneurial workspace, allowing high-value and impact priority sectors to grow and expand while also providing more affordable space for small businesses, social enterprise, and the third sector.

How are we doing it?

Both of these projects will be delivered as sustainably as possible. Cave St will aim to meet BREEAM Outstanding, the top rating for sustainability from the Building Research Establishment. £1.93m of Government Local Growth Funding from OxLEP has been essential to supporting scheme viability. The City Council will work with a specialist workspace operator to ensure the project supports a thriving community of local businesses.

Did you know?

A third of the workspace space will be licensed to qualifying businesses at more affordable rates

Case Study 10

Oxford North and Community Employment Plan

What is it?

Oxford North is brand new mixed-use district providing homes, office space and labs. Alongside the Oxford North Development, Thomas White Oxford (TWO) have agreed an innovative Training, Employment and Business strategy with OxLEP and Oxford City Council.



Why are we doing it?

TWO and the partners want to understand the jobs local people want, the skills needed to get those jobs, identify skills gaps and create exciting new careers, right through the supply chain. Priorities for the plan include:

- Youth and apprenticeships.
- Local labour, supply chain and procurement
- Engaging with education
- Disadvantage and communities to achieve a more inclusive economy
- Reskilling, upskilling older people into new careers

How are we doing it?

A range of partners are collaborating to ensure the project creates aspiration and opportunity for local people.

What's more, local education institutions will be regularly invited to engage with design, construction, science and ecology as the project progresses.

Partners will focus not only on maximising opportunities

Did you know?

Oxford North will create 4,500 Jobs

