

December 2025

South Oxfordshire and Vale of White Horse
Joint Local Plan 2041

REPD02

Interim Report of the Oxford Growth Commission



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or write to us at:

Ministry of Housing, Communities & Local Government
Fry Building
2 Marsham Street
London
SW1P 4DF

Telephone: 030 3444 0000

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Neale Coleman is the independent Chair of the Oxford Growth Commission, appointed by Ministers in the Ministry of Housing, Communities and Local Government. This report reflects his views as Chair of the Commission. It does not represent views of the Government.

Neale Coleman CBE was appointed as the Chair of the Oxford Growth Commission in May 2025 to support the delivery of infrastructure, housing and employment to unleash Oxford and Oxfordshire's economic power. Neale has a proven track record in delivering growth and regeneration, including his work for the 2012 Olympic and Paralympic Games in London and the 2022 Commonwealth Games in Birmingham.

Foreword from Neale Coleman CBE, Chair of the Oxford Growth Commission

In her January 2025 speech on economic growth, the Chancellor Rachel Reeves announced plans to go “further and faster” to unlock growth in the Oxford-Cambridge Growth Corridor, capitalising on the Corridor’s potential to be Europe’s Silicon Valley and to add £78 billion to the UK economy by 2035¹. One element of her announcements was a new Growth Commission for Oxford to help accelerate growth in the city and its surrounding area. In May 2025 I was appointed Chair of the Oxford Growth Commission and asked to provide an interim report to Ministers in the Autumn.

Oxfordshire has been one of the fastest growing economies in the UK, with sustained job growth of around 6,000 per year from 2010-2018². The potential for further transformational economic growth in Oxfordshire was identified in previous studies of the County with the 2021 Oxfordshire Growth Needs Assessment (OGNA)³ and the 2019 Local Industrial Strategy⁴ targeting a doubling of the County’s GVA from 2020 to 2040, with an additional 103,000 jobs. Current analysis by Volterra for Oxford City Council⁵ forecasts the potential for Oxfordshire’s GVA to increase from £38.4 billion in 2023 to £64.9 billion in 2050 with an additional 218,000 jobs.

Much of the impetus for these growth prospects comes from knowledge intensive sectors and the innovation ecosystem, driven by the world leading research capacity of the University of Oxford – assets identified by the recent Nobel Prize for Economics winners as fundamental to economic growth⁶. In the past decade Oxford University’s pipeline of spinout companies, the highest of any in the UK⁷, has rapidly accelerated and matured. Analysis by Onward in 2024 found that Oxford is spinning out twice as many new companies a year than in 2015, attracting nearly eight times more investment.

Oxford and Oxfordshire score highly in six of the eight high potential growth sectors identified in the Modern Industrial Strategy⁸. Whilst the urban innovation ecosystem in and around Oxford plays a critical and central role, other important focuses for growth and innovation in the County also enhance the impact of the University, including in Science Vale to the south and Motorsport Valley to the north. The Harwell Science and Innovation Campus is a particularly significant and often under-appreciated national asset for the UK with 7,500 scientists and innovators onsite and fourteen national science

1 [Chancellor vows to go further and faster to kickstart economic growth – GOV.UK](#)
 2 [Microsoft Word – Final Oxfordshire Growth Needs Assessment Phase 2 Report 24.06.21](#)
 3 [Microsoft Word – Final Oxfordshire Growth Needs Assessment Phase 2 Report 24.06.21](#)
 4 [Oxfordshire Local Industrial Strategy – GOV.UK](#)
 5 [See page 295 onwards \(Public Pack\) Agenda Document for Cabinet, 10/11/2025 18:00](#)
 6 [The Prize in Economic Sciences 2025 – Scientific Background](#)
 7 <https://ukonward.com/reports/venturing-out/>
 8 [The UK’s Modern Industrial Strategy 2025 – GOV.UK](#)

facilities. Taking full advantage of Oxford and Oxfordshire's unique assets is necessary to achieving the Government's national ambitions for its defining mission of economic growth. But success in achieving economic growth will also need a strategy for sustainable and inclusive growth that delivers real benefits and improved quality of life to communities across the County. With that in mind, the six Oxfordshire Councils agreed a Strategic Vision in 2021⁹ for a healthy, sustainable and thriving future for the County.

Delivering on the strategic vision requires a spatial investment and land use strategy across the County that joins up economic growth with investment in transport, new housing including new affordable housing, achieving net zero, nature recovery and the environment, and skills and employability. A vital element in such a strategy is aligning economic growth with requirements for new housing to improve affordability and reduce commuting pressures. However, for some time there has been no county-wide strategy; this alignment has not been achieved, and housing affordability and congestion have worsened. The commitment to an Oxfordshire Plan 2050, agreed by the local authorities with Government in 2017, was abandoned in 2022. Since then, the gap between Council plans for new housing and what is needed has widened, with current emerging plans collectively falling well short of the minimum requirements set by Government.

The Government's plans for new Spatial Development Strategies across England can enable this and other strategic issues for sustainable development, such as infrastructure and skills, to be

addressed. Plans for local government reorganisation will also bring together local planning for economic and housing growth with transport. Given the importance of Oxford and its wider region for national economic growth, the Government should aim to make decisions as quickly as possible on the exact form of these changes. Meanwhile, development that is ready to go should be enabled rather than delayed by the need for new plans. The districts' and County Council's strategic work should be based on achieving at least the minimum housing requirements set by Government, with a further allowance for accommodating economic growth. Local plans should also expect to deliver this. Successful co-ordinated working is already represented in the very strong and well evidenced County Council's OxRail 2040: Plan for Rail¹⁰. The Growth Commission will work with the County and the Strategic Rail Promoters' Group to support delivery of this plan and its objective of delivering an Oxfordshire Metro transport network.

The strategy for economic growth should include a focus on urban, edge of city developments and urban extensions to Oxford. Volterra reports¹¹ that high value businesses favour locating to these areas because of urban amenity, proximity and agglomeration benefits and also in sustainable expansion to existing established economic clusters. These developments need to be supported by improved public transport, high-quality mixed-use development, including new tenures and typologies of housing, and optimal densities. In some cases, modest Green Belt releases will be needed. Encouraging development in these sustainable locations will support

⁹ [A Vision for Oxfordshire](#)

¹⁰ [OxRAIL 2040: Plan for Rail | Let's Talk Oxfordshire](#)

¹¹ From page 295 onwards ([Public Pack](#)) [Agenda Document for Cabinet, 10/11/2025 18:00](#)

agglomeration and innovation and relieve pressures on more rural locations. This report identifies opportunities for further such development including the area around the reopened Cowley Branch Line; Oxford Central and West End; and at Oxford, Kidlington and Parkway Station. While these are large settlements rather than 'new towns' the aim should be for these developments to meet the ten key placemaking standards set out in the report of the New Towns Taskforce¹². In some cases, new delivery or consenting routes may be required.

The Growth Commission will continue our work on accelerating housing development across the County, and our report also sets out opportunity areas for new housing and employment, generally focused on existing land allocations such as those at Salt Cross and Eynsham. I have requested more support from Homes England to help delivery of key sites, particularly to support districts with more capacity to take forward applications for larger sites. The Growth Commission will work with Homes England to seek to prioritise investment resources and will also support the delivery of the exceptional growth opportunities at the recommended New Town at Heyford Park. We are looking to target up to ten sites which with the right support could start delivery of new housing in the next eighteen months.

12 [New Towns Taskforce: Report to government - GOV.UK](#)

Interim Report of the Oxford Growth Commission



Oxford Skyline



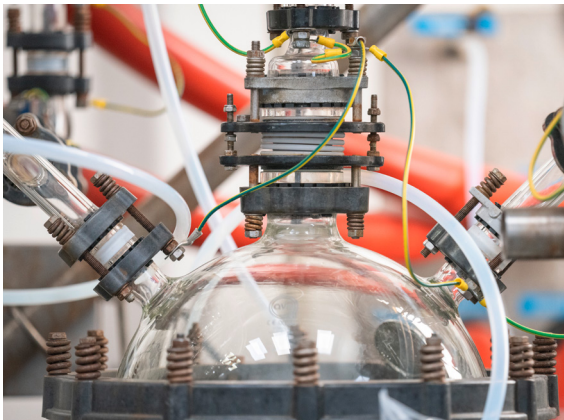
Electric bus



View of Harwell



Proposed Blackbird Leys Development



Science and Innovation



Aerial view of Oxpens



Narrow Boats near Kidlington



Proposed Ellison Institute of Technology hub



Train at Oxford Parkway

The opportunity for growth in Oxford and Oxfordshire

Oxford and Oxfordshire are the prime locations for delivering inclusive and sustainable growth at the scale and pace necessary to support wider UK growth. As the regional driver of the economy, Oxford sits in the centre of UK innovation: the 'Golden Triangle' of Oxford, Cambridge and London. East West Rail will improve the County's links to Milton Keynes, Bedford and Cambridge and underpin the Government's ambitions for growth across the Ox-Cam Corridor. The M4 and M40 corridors and Great Western Mainline link Oxfordshire to the Thames Valley tech cluster, a major contributor to the UK tech economy; to London, the engine of the UK's economy; to Heathrow Airport, a strategic gateway to growth; and to the diverse economic sectors in the Midlands. Enhanced links to places such as Swindon, Cheltenham and Bristol further west will enhance and deepen synergies in important sectors including manufacturing and defence technology. While Oxford itself sits at the heart of the county and drives economic growth, there are other significant locations throughout the County, highlighted in this report, which support and drive growth in the regional economy.

Following extensive engagement with stakeholders across the County over the past few months, the Oxford Growth Commission has formed an interim view of priorities for sustainable and inclusive development to support

growth, which are set out in this report. We also address important issues affecting the achievement of sustainable growth – including current infrastructure and other constraints – and how they should be tackled. This report is intended to present initial learning from the Commission's work to HMG, local authorities and other stakeholders in advance of further work to develop a joined up spatial and investment strategy across the county. Where we make recommendations for further work or prioritisation, either for the Growth Commission or for other partners and stakeholders, these are shown in **bold. Annex A** to this report includes background information about the Oxford Growth Commission.

Economic Growth and Agglomeration

All the opportunities highlighted in this report support the ambitious plans and forecasts for economic growth set out in previous local analyses of growth needs and the local industrial strategy and strategic economic plan 2023¹³, developed on behalf of the County by Oxfordshire Local Enterprise Partnership - which is now owned by Oxfordshire County Council and trades as Enterprise Oxfordshire. While Oxford and its immediate environs have experienced the strongest economic growth in recent years, there are opportunities for economic growth across the County

and the City. They have world-renowned strengths in six of the eight knowledge intensive sectors prioritised in the Modern Industrial Strategy, which can be expected to continue. Evidence prepared for Oxford City Council shows that high value firms are looking to locate and major investors to invest in edge of city sites to benefit from agglomeration, proximity and urban amenity¹⁴. **Planning policies need to support agglomeration and maximising economic growth and benefits by ensuring the availability and allocation of suitable land in and around the city of Oxford and in key established economic locations Countywide for both economic and housing development.**

This emphasis on agglomeration in and around the city of Oxford is an important strategic principle, alongside consolidating growth within and adjacent to existing economic clusters, but economic growth will need to go beyond the spinout and knowledge intensive economies. For example, tourism and the visitor economy play an important role across the County and need support to continue to thrive. This includes provision of sufficient quality and choice of hotel accommodation to reduce the demand for short term rental properties in Oxford, which are reducing opportunities for local housing choice and putting unsustainable demands on the ability to meet local housing requirements. **Stakeholders have made representations to me of the importance of securing greater regulation through the Government's proposed registration scheme and planning system changes.**

There are other economic opportunities in manufacturing, green technology, automotive and engine technology

and clean fuels. The BMW Mini plant in Oxford is a particularly important focus for the automotive industry providing thousands of direct and supply chain jobs, including in the associated plant in Swindon. It is important for the Government to support the plant and its future plans on issues such as energy costs and trade with the EU. Local stakeholders also need to help with active travel links to the plant, addressing transport congestion and seeking to negotiate alignment of Cowley Branch Line services with plant shift patterns.

As the towns across the County and around the city of Oxford grow, the foundational economy will grow in importance and therefore need support.

For places to succeed and to enhance the quality of life for people living in Oxfordshire, economic growth must be both *inclusive* and *sustainable* and supported by the delivery of the right economic and social infrastructure.

Inclusive and Sustainable Growth

By inclusive growth we mean growth that supports all in society, allowing local people to benefit through access to local jobs, skills, training, affordable housing, local services and increased wages. In creating the right type of growth in the right places, left behind communities can benefit alongside the wider community. While the County enjoys one of the highest employment rates in the country there is deprivation and poverty in pockets within Oxford, Banbury, Carterton and in rural areas. **Any growth strategy for the County should address these existing inequalities where possible.** Oxford City has areas of very concentrated deprivation where

14 Volterra report – published October 2025 referenced earlier

many residents face additional barriers to accessing opportunity and **these areas will need focused and tailored interventions to complement the strategic demand approach which should emerge from the Mayoral Strategic Authority (MSA).**

By sustainable growth we mean growth that is in the right places to allow for travel by sustainable means including active travel and use of public transport and that reduces the need to travel by private car for daily trips. **Development should minimise harmful emissions, harm to the natural environment and maximise opportunities for green energy solutions to delivering the County's plans to address the climate emergency¹⁵. Development should also wherever possible enhance nature and biodiversity and create opportunity for people and other species to enjoy both the natural and the historic environment.** Oxfordshire's Strategic Vision for Long-Term Sustainable Development¹⁶ agreed by the local authorities in 2021 supports these principles and sets out the aims of realising sustainable growth and shaping healthy, resilient communities in which all residents can thrive.

The Failure of the Oxfordshire 2050 Plan

Delivering this vision and achieving sustainable development requires a strategic investment and land use strategy across the County that aligns economic growth with requirements for new housing to reduce affordability and commuting pressures. A commitment to

such a spatial strategy for Oxfordshire to 2050 and a Housing and Growth Deal were agreed with Government in 2017 including the planning and delivery of 100,000 new homes between 2011 and 2031¹⁷. The 2021 Growth Needs Assessment identified a similar requirement, of 5,000 new homes a year to align with economic growth. However, in 2022 the local authorities could not agree on the scale and distribution of the housing requirement and the commitment to an Oxfordshire Plan 2050 was abandoned.

In practice, in the period 2011-2021 there were 37,449 housing completions. To meet the commitment to 100,000 new homes originally agreed would have required almost a doubling of delivery over the next ten years from 2021. Delivery in the last three years of 14,276 homes has not achieved this and overall delivery to 2031 will fall well short of the agreed commitment of 100,000 homes.

Planning for Oxfordshire's Housing Need

More recently, the gap between Council plans for new housing and what is already needed has widened. In December 2024 the Government introduced a new Standard Method for setting housing need which identified an annual need for 5,301 new homes across Oxfordshire¹⁸. These minimum needs also do not make any specific allowance for a growth strategy and to support the potential for economic growth in a sustainable way, delivery above the new standard method will be required, as envisaged in paragraph 69 of the NPPF¹⁹.

¹⁵ [Oxfordshire Net Zero Route Map & Action Plan Final Report](#)

¹⁶ [CA_APR2021R05 Appendix 1 – Strategic Vision.pdf](#)

¹⁷ [Oxfordshire housing deal – GOV.UK](#)

¹⁸ [lhn-outcome-of-the-new-method.ods](#)

¹⁹ [National Planning Policy Framework](#)

However, the emerging plans for four of the five Oxfordshire districts would appear initially to set a requirement for 1,246 fewer homes each year than the minimum need and from 2035, up to 1,759 fewer. **This could result in planning for significantly fewer homes than the minimum need over the next period.**

Alone of the districts West Oxfordshire, the most rural of them, is now planning to meet the minimum need set by the new Standard Method including an additional buffer, aiming to deliver 18,000 homes over the eighteen years from 2025²⁰. While welcome, this does not explicitly confirm agreement to meet Oxford's unmet needs. The absence of strategic planning in Oxfordshire has allowed a situation to develop in which the local authorities collectively are not planning to meet their minimum housing requirements on a County wide basis. This is difficult for Oxford City Council given its existing district boundaries and limited capacity. Until local government reorganisation Oxford's unmet needs should be accommodated in other plans. **Local plans for Oxfordshire as a whole need as soon as possible to meet the minimum housing needs set by Government with a further allowance to support the scale of economic growth across the County.**

The lack of a County wide spatial strategy and of an agreed and co-ordinated set of local plans complicates planning for economic and social infrastructure. However, the County Council and the districts have worked together to prepare a strategic Oxfordshire Infrastructure Strategy (OxIS)²¹, which was published in draft for consultation in August 2025. These are primarily based on current and emerging local plans, so do not plan

for housing growth on the basis of the new Standard Method over the next five years. However, they include a scenario to 2050 based on the local plans over the next five years and then the new Standard Method with a 10% uplift. This is said to be "in response to the Government's ambitions for the Oxford Growth Commission and the Oxford-Cambridge Growth Corridor" and leads to an annual housing requirement of 5,360 homes, very close to the 5,301 number for the new Standard Method applied over the whole period including the first five years. **This 'upper' scenario should be used as a minimum baseline for infrastructure planning purposes.**

The illogicality in this scenario is the backloading of housing delivery caused by local plans failing to meet housing requirements over the next five years. There is no good reason for this, and it should be corrected to increase current momentum and prospects for new housing delivery. But the overall housing numbers to 2050 in this upper scenario are a reasonable starting point for long term infrastructure planning. They underpin the OxIS forecast that there will be population growth of approximately 221,000 to 250,000 people between 2024/25 and 2049/50, meaning that Oxfordshire's population will likely reach one million by 2050. **Overall, the Growth Commission supports the analysis in the OxIS of future infrastructure requirements.** Later in this report we look at the most immediate infrastructure issues that are proving barriers to sustainable development and how they need to be tackled.

20 [Local Plan 2043 – preparation of a new plan – West Oxfordshire District Council](#)

21 [OxIS](#)

Accelerating Housing Delivery on Strategic Sites

Local government reorganisation and the creation of a sub-regional MSA for strategic planning purposes are urgently needed. Both before and after local government reorganisation and devolution, further work will be needed to develop and put in place a spatial development strategy to deliver more housing and enable sustainable growth. Initial work involves producing and analysing spatial data at a scale larger than the current local planning authority level. The National Infrastructure and Service Transformation Authority (NISTA) has been developing a spatial modelling tool, and we have introduced their team to the County Council to explore the potential for Oxfordshire to pilot this tool. **However, the immediate priority is to make faster progress in delivering the right consents for allocated sites – taking advantage of the opportunities for increased ambition and optimal densities, quality place-making and good levels of affordable housing.**

Larger strategic sites are increasingly important in achieving significant housing growth, but they are often complex, require infrastructure and are slow to develop. To achieve recent housing growth the County has relied upon large sites, for example Great Western Park in Didcot (approx. 3,300 homes), Kingsmere in Bicester (approx. 2,500 homes), Grove Airfield near Wantage (approx. 2,500 homes), Longford Park in Banbury (approx. 1,000 homes) and Barton Park near Headington (approx. 885 homes). The quantum of growth needed in Oxfordshire cannot be met solely by small site developers, although these will continue to make an important contribution. Further substantial

developments, some of which already have consent and have commenced on site, will provide the majority of the housing growth in the coming years.

There are significant large-scale opportunities to support growth on the scale that is needed, both in and around Oxford and in the existing employment locations elsewhere in the County. Towns and cities, together with the principal employment clusters, are the most sustainable locations for development and the County also has a well-developed spatial pattern of many centres that can and should accommodate the majority of new growth beyond the strategic sites in small and medium sized developments. In some cases, sites may require upfront investment in infrastructure and where this is the case we will work with the local authorities and Homes England to identify priorities for investment.

Opportunity Areas for Growth

We have reviewed the existing local plans and talked to local authorities, landowners and developers across the County. As a result, we have identified 13 Opportunity Areas where large scale growth could be accommodated in sustainable settlements. These are based on land already allocated for development and are set out with some commentary in **Annex B** to this report.

In the key Oxford-adjacent Opportunity Areas alone, a reasonable ambition would be delivery of around 50,000 new jobs and around 32,000 new homes. Similarly, across the rest of the County we estimate circa. 50,000 additional homes and up to 40,000 new jobs could be accommodated in the main Opportunity Areas, plus at least 9,000 homes at Heyford Park should the current planning application be approved. These numbers can

and should be increased as and when local plans come into line with the new Standard Method for assessing housing need and an additional allowance for economic growth as we have recommended. **The imbalance between jobs and homes numbers for the Oxford adjacent Opportunity Areas could be further reduced by the City Council's estimate that 40,000 new homes could be identified from limited Green Belt release in future local plan reviews.**

Additionally, there are opportunities for sustainable development in and around existing towns and at the recommended Heyford Park New Town identified by the New Towns Task Force.

The Opportunity Areas we have identified are already spatial priorities within the existing planning frameworks and the suggested homes numbers reflect only sites already allocated for development in local plans with the exception of the Oxford Cowley Branch Line Opportunity Area where the Government's decision to fund the Line offers immediate opportunities to increase and optimise densities and expand existing allocations in particular on land owned by Oxford colleges. This reflects our emphasis that the immediate priority is to accelerate and optimise development on existing allocations.

In some cases, for example the Cherwell Partial Review sites north of Oxford, sites have been allocated in a piecemeal way and there has been insufficient emphasis on quality and integrated place-making and on supporting connectivity and links to key mobility hubs like Oxford Parkway. Some other allocations fail to identify the full potential of sites within the location. **The twin challenges for local authorities, landowners, developers and other stakeholders are now to deliver existing site allocations in an optimal way that does not prejudice future growth potential and to plan for further**

sustainable growth where appropriate, including in identified Opportunity Areas to be allocated in future local plans. This is challenging for the districts and County who often lack capacity to deal with such major development areas. The Growth Commission and Homes England will work with the County Council and LPAs to provide additional capacity, commission new spatial frameworks, overcome barriers to delivery, and consider what if any longer-term capacity is needed. As an immediate priority we will work with the local authorities and Homes England to target up to ten sites with which the right support could start delivery of new housing in the next eighteen months. Overall, this work should feed into a future spatial development strategy for the sub region and future local plan reviews.

Delivery Challenges

Tight market conditions in recent years have exacerbated viability challenges faced by developers wishing to bring forward sites. This requires a joined-up approach by the County Council and the relevant district council/s in negotiating with applicants and addressing infrastructure needs that are Opportunity Area wide. These issues include for example congestion on the A40 affecting sites in the Oxford Eynsham and Salt Cross Opportunity Area and the need for new road infrastructure around Bicester. **To assist with developing the Opportunity Areas across the County and their infrastructure and other requirements the Growth Commission has requested that Homes England provide additional support to add to the capacity available in the local authorities which can struggle with the complexity of the larger strategic sites.**

For example, Homes England has agreed to work closely with the Ministry of Defence to bring forward the Dalton Barracks site in the Abingdon Dalton Barracks Opportunity Area and to support discussions with Grosvenor, the land promoter for the Salt Cross Garden Village in that Opportunity Area. Housing completion figures in Oxfordshire show a notable reduction (about 30%) in the number of completed developments in 2023/24 compared to 2022/23.

This is thought to be largely due to economic conditions. Local authorities, working with Homes England, need to incentivise developers to invest in both employment and residential schemes. Where local authorities lack the capacity and experience to negotiate major schemes, they should ask for help. The Growth Commission and Homes England will work together to identify the need for support and how these needs can be met, including where appropriate asking for developer contributions to support more capacity including through PPAs. **New developments can provide resources for infrastructure and place-making to demonstrate to local communities that growth will be sustainable and will benefit existing communities.**

The opportunities to achieve this can be seen in the contributions from developers and landowners that have made funding the Cowley Branch Line possible. New project governance will be required including the two councils, Network Rail and major landowners to oversee the delivery of the CBL, including the integration of the new stations with the wider community, for which a potential cost of £20m has been identified. This will need to come largely from CIL and Section 106 agreements. In addition, at its last

Cabinet meeting the County Council²² has agreed a programme of £27.5 million from Section 106 contributions to accelerate the development and delivery of transport schemes to support housing and commercial growth on sites across the County. The County Council also agreed investment priorities for resources generated from its two successful Enterprise Zones to support strategic site development, deliver high-quality infrastructure and fund business support. Over the lifetime of the Enterprise Zones they are forecast to generate £463 million in retained business rates. An initial allocation of £10 million to support the OxRail 2040 plan was also agreed.

Demands for Section 106 and CIL contributions to meet all the ideal requirements of a scheme can make it unviable to deliver any development at all. One issue that has been consistently highlighted as a barrier is the County Council's approach to school place needs, even though in many completed schemes the places forecast by the assessment model have not arisen in practice. The expectations for new school places generated by new development seem high compared to our experiences in planning major schemes elsewhere. **The County Council and districts need to work closely together on strategic sites to consider all the infrastructure needs for the place and determine a list of priorities – even if that means that every policy aspiration cannot be met in every case and trade-offs are needed to achieve a planning balance.** In some cases, other sources of public funding may be required to support development. Where schemes can be accelerated by reviewing Section 106 and CIL demands they should be, although overall

22 [Choose agenda document pack – Cabinet 21 October 2025 | Oxfordshire County Council](#)

aspirations about the quality of new development should be maintained. This approach can be calibrated as market conditions improve.

Oxford's Opportunity Areas

In its own work over the next year the Growth Commission will prioritise work on delivering the Opportunity Areas in and around Oxford, given the importance of these areas for agglomeration and the urban ecosystem, and for the economy of Oxford and the whole of the UK. This work has already started with commissioning via Homes England a spatial framework for the land and opportunities opened up by the agreement with the Government to fund the reopening of the Cowley Branch Line and new stations at Cowley and Littlemore. This area will also see the transformative £10 billion in inward investment from the Ellison Institute of Technology to develop a new Innovation Campus with 7,000 additional direct jobs aiming to develop and deploy commercially sustainable solutions to solve some of humanity's most enduring challenges²³. Besides these aims the Institute is committed to maximising benefits and opportunities for local communities and the Growth Commission will support them in this.

Work on the Oxford Central and West End Opportunity Area, which has development potential on the scale of King's Cross, will look to bring forward and deliver on the aspirations for regeneration and a major urban extension in the west of Oxford including the consented development at Oxpens and the big brownfield opportunity at Osney Mead. The Growth Commission

will consider and if appropriate make the case for new funding mechanisms to support infrastructure and the public realm here. Local stakeholders have suggested a Tax Increment Financing scheme could be a good option to achieve this.

Critical in this Opportunity Area will be the successful modernisation and transformation of Oxford Station with new platforms to the West and East, a new Western Entrance and underpass serving all the platforms alongside an upgraded Eastern Entrance to enable the station to act as the central and most important mobility hub for the whole County. The Growth Commission is working with Network Rail, the Strategic Rail Promoters Group and the County and City Councils to develop and implement a masterplan to achieve these outcomes, seeking to minimise private car parking, achieve integrated bus interchange and deliver new capacity at the station in the longer term. Time for this is tight with the second phase of East West Rail due to arrive at Oxford in the 2030s, but it needs to be seen by all as the first priority for transport planning in the County. **Equally important for improving what is now a very poor arrival experience to Oxford will be progressing plans for development of Nuffield College's land along Hythe Bridge and Park End Streets and at the Worcester Street Car Park.**

In the Oxford East Opportunity Area, besides the close to consented housing scheme at Bayswater Brook, the key opportunity is the plan for Warneford Park, a new centre for Mental Health and Brain Sciences to complement the existing concentration of NHS facilities and world leading medical research. This scheme, for which a

23 [EIT Welcomes Cowley Branch Line Announcement and Lays Out £10bn Science Investment Plan | Ellison Institute of Technology Oxford](#)

planning application was submitted to Oxford City in 2025, will provide a new, fit-for-purpose mental health hospital surrounded by a research and innovation hub. This will have a positive impact on patient care not just in Oxfordshire but across the NHS.

In the Oxford, Kidlington and Parkway Station Opportunity Area there should be a new focus on place making across the allocated sites.

This should prioritise improving connectivity including for walking and cycling. Good public transport connections should take advantage of the opportunity offered at Oxford Parkway Station itself to consolidate parking and release brownfield land for sustainable development and for developing a new station at Begbroke which is prioritised in the County's OxRail 2040 Plan.

The Opportunity Area also presents important options to release additional land for housing through future plan reviews increasing the assumption in current plans of up to 5,000 new homes here.

Across the Opportunity Areas, including those outside Oxford, housing development should include the maximum viable levels of affordable housing and a range of housing typologies and tenures including build to rent schemes to meet the range of local housing needs.

This includes new hotel provision to help reduce reliance on the short term let sector and release such existing dwellings to meet the needs of the general population. Supporting a range of housing tenures will also help to accelerate build out rates. **Density should be optimised especially in town centres and locations well served by public transport.** Viability challenges are present particularly for high density schemes, but in most areas existing plans assume medium density schemes at best.

Many residential developers in the UK are more than capable of building medium density homes of good quality and high-density employment buildings, but they have not traditionally been challenged to do so in Oxfordshire.

This needs to change to realise the growth opportunity in the County but also to ensure that development does not result in unsustainable sprawl.

There is plenty of room for more traditional housing types both for sale and for rent in more suburban locations on the edges of towns and in Oxford. Oxford City Council's proposed density matrix in the emerging local plan provides a useful starting point for achieving the right densities. More detail on the 13 Opportunity Areas is included in **Annex B**.

Issues to be tackled in delivering growth in Oxfordshire

The Planning Process

The previous section identified the immediate priority for growth as bringing forward existing allocated sites in an optimal way. As happens everywhere, landowners and developers raised with us the problem of delays from planning authorities and statutory consultees' handling of planning applications. This should be addressed in part by adding capacity from Homes England to support local authorities with strategic sites and by closer proactive work between the County and districts. Where there are capacity issues, local authorities could consider using standard templates and subcontracting drafting work to external local legal firms. Responsible developers will engage early with LPAs and fund pre-application conversations through PPAs. **One important area for action would be to speed up signing Section 106 and Section 278 agreements and issuing decision notices which often takes many months and can delay starts on site. Working with developers, the County and districts should review how this can be improved and identify other ways to reduce unnecessary delays in the planning process.**

In our discussions with developers, they frequently raised the issue of delays with and lack of timely response from the Environment Agency and other statutory consultees. Oxford City Council convened a meeting earlier this Summer between developers and senior Environment Agency staff to discuss the problems. **The Environment Agency**

outlined a range of planned changes to help, including the re-introduction of face-to-face pre-application meetings. This should be introduced as soon as possible.

Land

A common challenge in development delivery is fragmented and piecemeal landownerships. In some places good promotion models have been put in place to co-ordinate disparate land ownerships and equalise land values across large and complex sites. An example of this is at Salt Cross (with seven landowners) and at North Oxford PR6b (with three landowners), both of which are due to come forward for planning in the near future. Another challenge in Oxfordshire is the presence of a number of large strategic landowners who can readily postpone decisions about development or who are not geared up to deliver complex development projects.

Oxfordshire benefits from having Oxford University and its colleges as major landowners with an interest in developing land for housing and employment. Oxford University Development (OUD) is a joint venture between the university and Legal & General which is promoting development of some important sites, including the Begbroke Science Park and potentially Osney Mead. Oxford City Council and Nuffield College are promoting Oxpens through Oxford West End Developments LLP, Oxford North is being developed

by St John's College with its own development company, Thomas White Oxford, while Christ Church College has partnered with Dorchester Residential Management to progress a housing development at Bayswater Brook adjoining Barton Park.

However, some key sites in Oxfordshire have not progressed as quickly as they should, either due to there being no development partner, disjointed arrangements between different landowners and partners, or a partner who is not sufficiently engaged in the process. In some cases, landowners may be concerned about the level of profit likely to result from the development at a particular moment in the economic cycle and can afford to take a long-term view. In such cases as these we encourage major landowners to take a long-term view about profit and take a patient capital approach, putting land forward and waiting for a return when development is complete. In other cases – and where there is interest from the development market such that a suitable indemnity agreement could be reached with an investor or developer partner – local authorities or Homes England might need to consider intervening to acquire sites which would otherwise remain stalled, if necessary by compulsory purchase order. **We would encourage major landowners, particularly Oxford University and its colleges, to take a wide view about the benefits of development for the City, their own students and staff and how these fit with their charitable purposes, to secure delivery partners early to avoid abortive planning costs on undeliverable schemes, and to adopt models such as Christ Church College's responsible ownership policy²⁴ in developing their plans.**

Heritage

One of Oxford and Oxfordshire's main advantages is that it is a beautiful place with numerous historical and natural assets. Managing these requires great care to ensure that the things that make Oxford and Oxfordshire special are retained and enhanced for future generations. New buildings should respect the historic context and enhance the townscape through high quality design, following in the footsteps of their historical equivalents. But development can also provide an opportunity to enhance historical settings and the skyline, particularly in longer distance views out from the city. We have heard several examples of buildings being delayed or massing reduced to protect historical assets, although they would only have been seen slightly in long distance views. A good start has been made by Oxford City Council, Historic England and Homes England in assessing the potential for development in the Cowley Branch Line Opportunity Area and identifying appropriate locations for greater height. **More similar work needs to be done starting in the Central and West End Opportunity Area to review the existing views framework in the City, originally developed sixty years ago. The need to take account of the economic benefits of development when considering applications that have some potential harm to heritage is set out in paragraph 85 of the National Planning Policy Framework, but this has to be balanced with paragraph 212 requiring great weight to be given to protecting heritage assets including their setting. Clarification in the next version of the NPPF would aid**

24 [Responsible Ownership Policy for Property | Christ Church, University of Oxford](#)

policy and decision makers in doing this, especially when considering the long-range setting of heritage assets.

Flooding

Of the 2,605km² that comprises Oxfordshire County, 96.6% is situated in the Thames River Basin District. Oxford city is located at the confluence of the Thames, Cherwell and Evenlode which forms a single floodplain at South Oxford and experienced flooding in 2000, 2007 and 2014. River flooding is a particular issue in Oxfordshire, along with other forms of flooding such as surface water flooding²⁵. The Oxford Flood Alleviation Scheme (OFAS) will create a new stream with a wetland wildlife corridor to reduce flood risk in the city and surrounding areas. The 5km scheme will reduce flood risk to all properties in Oxford currently at risk of flooding from the River Thames, as well as to the railway, local roads, utilities and services such as broadband. It will also create over 20 hectares of new wetland habitat. Over its lifetime, the scheme is forecast to save over £1.6 billion by reducing flood damage and disruption. Further, it will unlock development in key sites in the West End and Central Oxford. **A key priority essential to delivering OFAS is repairing the A423 Kennington Bridge which is part of the local highway network. Failure of the bridge would seriously impact the road system and cause damaging congestion. We are currently engaged with the County Council, DEFRA, DfT and the Environment Agency to support this project towards implementation.**

Nature Recovery

As the OFAS project shows, nature should not be characterised as a constraint on growth. Planned properly nature-based solutions can help de-risk growth, attract investment, and enhance quality of life. The County Council's Local Nature Recovery Strategy provides a policy framework to help with achieving this. **The Growth Commission will work with local partners to explore and support further opportunities to design climate-resilient infrastructure and to identify investable nature recovery projects.**

Digital

Digital connectivity is essential for Oxford's industries. Both broadband connectivity and 5G provision are inadequate and require further rollout to sustain the world-leading businesses in the area. Mobile connectivity is also essential for a modern economy, and this is inadequate in Oxford and across the County. Only 70% of premises in Oxfordshire have reliable outdoor 4G services from all operators. Although statistics on 5G coverage are less readily available, interim statistics indicate that levels of 5G connectivity vary massively across the county. In many places the coverage is consistently below 10%.

Following imaginative work by the County Council, Oxford has now been announced as the first of three major UK cities set for enhanced mobile connectivity through small cell rollout²⁶. **This project needs to be delivered at scale and as rapidly as possible as**

²⁵ <https://www.oxfordshirefloodtoolkit.com/risk/about-flooding/>

²⁶ <https://digitalinfrastructureoxfordshire.co.uk/oxford-selected-as-first-uk-city-to-benefit-from-cornerstones-small-cells/>

well as further work to co-ordinate and prioritise investment in the digital infrastructure.

Climate

The Net Zero Route Map and Action Plan agreed by the Oxfordshire Councils in 2023²⁷ set a pathway for the County to achieve net zero by 2050 with intermediate emission reduction milestones at 2025, 2030 and 2040. The introduction of the Future Homes Standard embedded in Building Regulations will ensure that new homes are built to be future-proofed with low-carbon heating and significantly higher energy efficiency. Monitoring has shown that transport is significantly the highest source of emissions in Oxfordshire but in Oxford building emissions are the highest contributor of carbon and NOx. The City Council is considering the potential for a heat network to help address this. **Tackling transport emissions will require a combination of improved public transport and active travel offers to increase patterns of sustainable and mixed development and to offer disincentives to private car use.** The County Council's Local Transport and Connectivity Plan, finalised in 2022²⁸, includes a target to reduce 1 in 4 of current car trips by 2030.

Transport and Connectivity

The County Council's target for reducing car trips will require a combination of improved public transport and active travel offer, increasing patterns of sustainable and mixed development and offering disincentives to private car use.

Appropriate transport modelling will be needed to support the development of new strategies and local plans, as well as more detailed transport models to assess planning applications. **The County Council, in its current role as the highway authority, should lead on identifying and maintaining the relevant transport models in conversation with the local planning authorities.**

Rail

The implementation of the County Council's OxRail 2040 plan will be a key element in this. The October 2025²⁹ agreement with the Government to reopen the Cowley Branch Line to passengers with two new stations is a great start, providing connectivity to vital science and technology businesses at the ARC Business Park and Oxford Science Park, linking Oxford's growth areas together and supporting the transformative plans of the Ellison Institute of Technology and other housing and employment opportunities in the Oxford Cowley Branch Line Opportunity Area.

Besides delivering services on the Cowley Branch Line and carrying out the modernisation of Oxford Station, OxRail2040 looks to improve services across the county setting out the delivery of an electrified railway, creating an integrated transport network across all modes, badged 'Oxfordshire Metro' with further new stations at Begbroke, Wantage & Grove and Ardley, and upgrading existing stations. Recognising the lack of a current rail corridor to the west of Oxford, a project to develop and promote a case for Carterton-Witney-Oxford Mass Rapid Transit, which may

27 [Oxfordshire Net Zero Route Map & Action Plan Final Report](#)

28 <https://www.oxfordshire.gov.uk/transport-and-travel/connecting-oxfordshire/ltcp>

29 [Jobs, homes and better transport links for the Oxford Cambridge Growth Corridor - GOV.UK](#)

include rail, will also be investigated.

The Growth Commission will work with the County, the new Strategic Rail Promoters Group, Network Rail and the Department for Transport to support implementation of OxRail 2040 and the Oxfordshire Metro integrated transport network with priority for delivering the Cowley Branch Line project, upgrading Oxford Station and supporting the case for a new station at Begbroke.

Bus Services

The County Council's Bus Service Improvement Plan (BSIP) and its Enhanced Partnership with local bus companies have delivered significant improvements to bus services across Oxford and Oxfordshire. This includes a significant number of new and protected services and notably 159 new zero emission buses in Oxford. Improved bus services will need to play a central role in achieving the Oxfordshire Metro integrated transport network. **Priorities for further improvements include delivery of more bus priority on key corridors such as the A40, resolving conflicts of bus turning in Oxford city, appropriate integration of bus stops at the upgraded Oxford Station, more zero emission buses, improvements to Park and Ride sites, more integrated ticketing, and ensuring sufficient bus garage capacity.**

Active Travel

Active travel schemes to encourage walking and cycling can and should play a major role in reducing car use, improving connectivity for communities and supporting sustainable development and wellbeing. Some investment in recent projects can be seen around the County, but some priority schemes

including Eynsham to Botley have been delayed and there has been slow progress implementing Core Schemes and Greenways linking suburban settlements to Oxford. While Oxford is known for its high rates of cycling and a strong cycling culture, increased uptake of active travel options to replace car dependency will likely depend on a step-change in provision.

The Government has helped to fund cycling and walking projects through five tranches of the Active Travel Fund between 2020 and 2025. However, delivery of these projects has been hampered by the complexity and number of partners involved. **The County Council should produce a clear, simple and prioritised plan of required Active Travel routes and work to implement these in a priority order.** One factor for determining a high priority should be the simplicity of delivering the route and the willingness of stakeholders to support these.

Roads

New and improved road infrastructure is critical to unlock stalled development sites, such as the major housing opportunities at Bicester. While some road schemes will be entirely funded by developers, other schemes will require government funding support, such as has occurred with the Housing Infrastructure Funding around Didcot and the A40 west of Oxford. Public sector support might also be required to ensure progress on road schemes where there are multiple developers with different timeframes. **The County Council should ensure that its emerging Movement and Place Plans clearly identify road schemes, their timescales and funding. The County Council should also ensure careful and prompt delivery of planned and funded road schemes**

(that have long been promised and delayed) including the first phase of further bus lanes along the A40 while exploring with the Growth Commission and Government how completion of that important project can be funded and delivered.

Oxford – Congestion, Movement and Public Realm

There are particularly severe problems of traffic congestion in Oxford. Plans for addressing these problems have been controversial and have been significantly complicated by the prolonged closure of the Botley Road due to the crisis with utilities arising from works to the rail bridge by Oxford Station. **This has meant a delay in the County Council's plan for traffic filters and other measures around Oxford to reduce congestion, and has now led to the introduction of a temporary congestion charge.**

As Network Rail and Thames Water are aware, it is very important that the August 2026 date for the reopening of the Botley Road is met and that the County Council ensures the traffic filters trial is introduced efficiently with strong public information about how it should work and its purpose. In addition to the traffic filters, County Council's 2023 Central Oxfordshire Travel Plan³⁰ sets out a series of expected actions including an expanded Zero Emission Zone in Oxford's city centre, a Workplace Parking Levy and delivery of a walking and cycle network. Whatever the outcome of the trial, **the County and City Councils will need to work further and harder on**

addressing how people and vehicles including buses in particular, move around the City. This work then needs to address how to improve the public realm in Oxford which is not of a standard appropriate to a major urban centre and one of the busiest tourist destinations in the UK.

In 2022 as part of Oxfordshire's Housing and Growth Deal, Government agreed to fund a Central Oxfordshire Movement and Place Framework (COMPF)³¹ to improve the way public realm in Oxford is planned and managed by considering transport, planning and regeneration opportunities at the same time in a joined-up way. In March 2025 the County Council published a draft summary report on the City Centre and North Oxford. This dealt mainly with a number of suggested public realm improvements rather than bigger issues about congestion and movement, perhaps because of the Botley Road issue. It also did not address how the public realm improvements should be funded and delivered. The City Council separately developed an Oxford City Centre Action Plan in 2021³², but this again needs reviewing and updating in the light of current circumstances and challenges.

Given the importance of these issues the County and City Councils should come together to agree the scope for additional action focused work on transport, movement, and then public realm in Oxford, building on the initial COMPF studies. This should also consider how public realm improvements can be funded and delivered including ways to attract resources from the tourist industry and owners and occupiers of retail premises including

30 <https://www.oxfordshire.gov.uk/transport-and-travel/connecting-oxfordshire/central-oxon-travel-plan>

31 <https://letstalk.oxfordshire.gov.uk/compf>

32 <https://mycouncil.oxford.gov.uk/documents/s68543/Appendix%201%20-%20Oxford%20City%20Centre%20Action%20Plan.pdf>

the Oxford colleges. The City Council and the West End Developers Forum is currently investigating options for a Business Improvement District (BID) in that area and exploring the viability of a separate Accommodation BID with hoteliers and colleges in the City Centre.

Should the proposed Accommodation BID not come forward there is an argument for a tourist levy in Oxford. Government should consider this in planning a Mayoral Strategic Authority that includes Oxfordshire.

Energy Supplies and Infrastructure

Challenges with accessing energy are putting growth in Oxfordshire seriously at risk. The stakeholder consultation draft of OxIS identified that twenty-two substations are overloaded and another three are at risk of becoming overloaded. Developers are encountering a lack of information about future network capacity. In some cases, they have been unable to gain agreements to access the electricity grid or have experienced downgrading of their energy agreements such that development is unable to commence. This includes schemes such as Fabrica on Botley Road and the Thames Valley Police Forensic facility in Bicester, where schemes under construction have been suddenly deprived of commitments to power and are at risk of being unable to complete and be occupied. Promised changes to the connections process getting away from 'first come, first served' should help, but again at present there is no information about the quantum and location of capacity that will be released.

Alongside the first AI Growth Zone in Culham, there are several proposals for data centres and other high-energy infrastructure in the County. While

these developments may offer huge opportunities to the region, they come with uncertain but potentially massive energy demands – equivalent to tens of thousands of homes – and could place significant strain on regional networks if not properly managed. Managing these proposals is not helped by the delays with producing a National Policy Statement for data centres.

The Oxfordshire local authorities are doing some impressive work in the joint production of Local Energy Action Plans supported by a strong consultant team. There are also some innovative community ownership models for solar power. **There needs to be greater transparency from the infrastructure providers and better co-ordinated modelling and information sharing to ensure future network capacity is accurately accounted for, particularly as key Grid Supply Points are built or upgraded and new sources of renewal supply come on stream. There is also a need for some short-term solutions to address locations where the lack of energy is preventing development that is otherwise ready to go.**

To support this work, the Growth Commission has already taken some important first steps, working with the City and County Councils to introduce a monthly Executive Steering Board addressing key energy issues with representatives from local authorities, SSSEN, NESO and local interest groups. **We helped to organise a November 2025 Oxford-Cambridge Corridor energy summit that identified and began to address the strategic regional challenges and opportunities. We hope that the outputs will result in short term reprioritising of the queuing system for electricity connections by the energy suppliers.**

Waste Water

Thames Water's Sewage Treatment Plant at Oxford is currently undergoing a series of urgent upgrades to ensure it is able to deal with waste water produced by new developments in and around Oxford. This news was announced in March 2025 and was extremely welcome in removing a short-term barrier to development in the City. We are working with Thames Water to monitor the implementation of this project. **In the longer term more capacity will be needed at this works and Thames Water needs to work with other landowners in the area to ensure that its plans enable rather than compromise the ability of allocated development sites to deliver appropriate density residential and commercial development.** We are working with Thames Water and the local authorities to understand the locations where further upgrades are needed to plants across the County and ensure that adequate investments are made in a timely manner.

Social Infrastructure

We have recommended that the development of larger strategic sites in Oxfordshire should adopt the placemaking standards recommended by the New Towns Taskforce, including that they should "support thriving communities by ensuring access to schools, cultural, sporting and healthcare facilities, and other social infrastructure that meets new residents' needs from the outset."

Some recent experience in Oxfordshire of planning future school places, a County Council responsibility, has shown that predicted demand from its model

for places and hence new schools does not always arise and **the County should review the model and its use given the overall pressures on schemes and the need to support existing schools.**

Innovation and Skills

The University of Oxford has launched a new initiative, originally called the Oxford Strategic Innovation Taskforce (OSIT), to build further on the huge innovation strengths and opportunities in the City and County. Launched earlier in November and branded EquinOx to emphasise a commitment to inclusive and equitable innovation, this will build on work by Oxford Science Enterprise and Enterprise Oxfordshire (formerly the Oxfordshire Local Enterprise Partnership) to promote and attract inward investment to spinouts and beyond. EquinOx will bring together businesses, universities, entrepreneurs and the public sector to provide a stronger single voice in explaining and promoting Oxford's innovation strengths and attracting further inward investment. One priority is attracting large corporates to locate in Oxford which has not yet had success on par with Cambridge's inward investment. **The Growth Commission will support EquinOx's work, including exploring private finance options as part of a diverse funding model for an innovation focused inward investment agency and bespoke space for promoting spin outs in Oxford and the wider County.**

Beyond the innovation sector there remains much to be done in improving support for skills development across the wider economy. The 2023 Local Skills Improvement Plan (LSIP) produced by the Thames Valley Chamber of

Commerce³³ and subsequent progress reports from 2024 and 2025 highlights acute skills shortages in health and social care, life sciences, ICT and digital, construction, logistics, and hospitality. This is another area where a new Mayoral Strategic Authority could provide leadership and a stronger strategic approach in what is currently a fragmented landscape of provision. This will be helped by the clear policy framework set out in the White Paper on Post-16 Education and Skills.

The County Council has recently adopted Oxfordshire Works³⁴, its local Get Britain Working Plan (subject to final feedback from partners), which sets out some initial priority actions required across the local authorities, JobCentre Plus, Integrated Care Board, and other actors in this space. More work is required as the County develops its economic strategy, but Oxfordshire Works is an important step in the right direction. Community Employment & Procurement Plans (CEPPs) also provide an opportunity to pool development contributions at a local level to support much clearer pathways into both construction and end-user employment. LPAs, economic development teams, major landowners and institutions including FE colleges need to work together to consider the scope for CEPPs. **Meanwhile the Growth Commission will do what it can to support partners in these conversations between employers, developers and education providers with a focus on the Cowley Branch Line Opportunity Area.**

33 <https://www.oxfordshiresip.co.uk/>

34 [CA211025 Get Oxfordshire Working Plan Annex Oxfordshire Works – A Local Get Britain Working Planv1.2.pdf](#)

Priorities and Next Steps

We will produce our final report in Autumn 2026. The report will set out recommendations to Ministers on priorities and actions to support growth in Oxford and Oxfordshire and on the future role of the Commission itself. Before that we will continue to take action to identify and argue for key priority investments and to support stakeholders with promoting and accelerating sustainable growth.

Much of our activity is and will be in supporting local stakeholders to overcome barriers to development and to develop and implement priority projects. We will continue to encourage the formation of ad hoc delivery boards which bring together the County Council and the City or other relevant districts to progress action. This will include:

- Participating in a project board to oversee the implementation of the Cowley Branch Line passenger services project
- Supporting Homes England and others to prepare a spatial framework for Cowley Branch Line Opportunity Area
- Participating in the Strategic Rail Promoters' Group
- Participating in a project board planning for Oxford City Rail station upgrade with a view to submitting a planning application within 12 months
- Working with the Environment Agency and local stakeholders to secure funding for and deliver the Oxford Flood Alleviation Scheme
- Working with Thames Water and local stakeholders to ensure Oxford sewage treatment works upgrades and longer term renewal plans are considered

- Implementing actions from the recent Ox-Cam energy summit
- Supporting EquinOx post launch by participating in the proposed EquinOx Council and supporting discussions with the Office for Investment, Department for Business and Trade and other key stakeholders on strengthening inward investment
- Meeting regularly with the Oxfordshire Developers Forum and with other individual and groupings of landowners, developers and promoters

Priorities for next 12 months

- Working with the local authorities and Homes England to accelerate housing delivery and unlock stalled sites including action to target up to 10 schemes that with the right support can begin to deliver new homes in the next eighteen months
- Developing infrastructure and delivery plans and business cases for the Oxford Opportunity areas
- Commissioning further spatial plans – with priority for Oxford, Kidlington and Parkway Station Opportunity Area
- Exploring, on a case-by-case basis, opportunities to accelerate key growth projects
- Working with Homes England on the development of an affordable housing delivery plan – working alongside local partners to understand the current affordable housing landscape in Oxfordshire to develop an appropriate affordable housing investment plan, setting out priorities for investment where needed including from other agencies and government departments

- Participating in the governance and scope of further work on congestion, movement and public realm in Oxford
- Continuing to work with statutory consultees to speed up their input into planning applications and to support coordination of their investment plans, especially Oxford Flood Alleviation Scheme and Oxford Sewage Treatment Works and upgrades to local energy infrastructure
- Considering the role of innovative funding mechanisms and developing the case for these
- Considering the need for any new delivery vehicle/s particularly to support development in and around Oxford

We look forward to continuing to work with local partners and stakeholders in taking forward recommendations and advice set out here and to hearing from a wider range of stakeholders and interested parties during the next 12 months when seeking to finalise our advice to Ministers in 2026.

Annex A – About the Oxford Growth Commission and this report

The Oxford Growth Commission was appointed by the Minister for Housing and Planning, Matthew Pennycook MP in May 2025 to review how best to unlock and accelerate growth in the city and surrounding area, working with central and local partners to maximise the benefits of growth to the local area and to the UK as a whole.

Our vision is to support the delivery of infrastructure, housing and employment to unleash Oxford's and Oxfordshire's economic power, accelerating growth in the Oxford-Cambridge Growth Corridor, and driving economic growth across the UK.

Geographically, the Commission is focusing on driving growth in Oxford and within the innovation ecosystem of which the city is the core. Given the constraints within the city, the interconnectivity between areas within Oxfordshire, and to maximise growth opportunities for all, we include the County and wider area as appropriate.

The Commission will report to the Secretary of State for Housing, Communities and Local Government by Autumn 2026 on its work to date and with recommendations for Oxford. This report which was shared in draft for comment with then County and City Councils sets out our interim thoughts and priorities. Since May 2025 when we started our work, we have heard from many stakeholders from key businesses, council leaders, government departments and agencies, environmental groups and community

champions. We are very grateful to everyone who has shared their time and expertise with us during this period. We need to go further in the next 12 months and hear from more people with an interest in Oxford and Oxfordshire.

The Commission is supported by a small team from the Civil Service, local authorities and Homes England.

If you would like to contact us about this report, please direct your queries to oxfordgrowthcommissionsecretariat@communities.gov.uk

Annex B – Proposed Opportunity Areas

The Opportunity Areas identified are areas where there are known opportunities for development, either in sustainable locations or locations that could be made sustainable for transformative levels of housing and/or employment growth. Jobs and home numbers start from land allocated in local plans but are an indicative statement of reasonable ambition taking account of optimising density and the potential for additional allocations. We hope these identified Opportunity Areas will be a useful starting point for

local authorities, working with partners including landowners and developers, to focus on delivery by considering their current planning status and any potential for further growth. We suggest that councils should prepare spatial, infrastructure and delivery frameworks that set out what needs to happen to deliver sustainable and quality development and place-making. Any opportunities identified for future growth can form evidence for the next stage of local plan making and / or Green Belt review (where applicable).

Indicative housing potential	Indicative jobs potential	Description / issues
Oxford Central / West End		
Circa. 1,000	Circa. 25,000	• Opportunities for transformational economic growth and residential development in and near to Oxford City centre. • Significant opportunities for redevelopment of brownfield sites in a sustainable location close to Oxford City Centre, Oxford Station and existing employment sites. • Delivery of Station and infrastructure and transformation essential. • Sizeable opportunities to improve the quality of and increase in amenity provision to drive increased footfall in sustainable location. • Considerable opportunities to extend, connect and upgrade the public realm and existing parkland. • Reliant on the Oxford Flood Alleviation Scheme (OFAS) being delivered. • The West End is already branded, as is Oxpens. Additional branding as well as support for the delivery of infrastructure could support this.

Indicative housing potential	Indicative jobs potential	Description / issues
Oxford Cowley Branch Line		
Circa. 12,000	Circa. 15,000	• The area comprises Littlemore, Cowley and the wider surrounding area • Opportunities for transformational growth in this location, including through densification in the existing built-up area of Oxford and surrounding area. • Significant opportunity to transform urban planning in this location having regard to the Cowley Branch Line reopening, supported by active travel-led redevelopment for employment, residential, open space and community uses. • Careful integration of development will be needed to maintain the area's distinctive identity and sense of place. Important regeneration and housing opportunity at Templars Square. Homes England is commissioning a new spatial framework for this area which is due to complete its stage 1 report by March 2026.
Oxford, Kidlington and Parkway Station		
Minimum 5,000	Circa. 8,000	• The area radiates from Oxford Parkway and its surrounds. There is an urgent need for a new spatial concept in this area through coherent strategic planning which cuts across sectors and sites and optimises opportunities for sustainable development. • This includes a re-look at the Oxford Parkway site itself. • A new spatial framework needed to set out a delivery framework for new infrastructure, including schools where existing allocations would seem to over provide for new school places, putting pressures on both scheme viability and the existing network of local schools.

Indicative housing potential	Indicative jobs potential	Description / issues
Oxford Salt Cross, Eynsham and Witney		
Circa. 7,500	Circa. 2,000	• The area comprises allocated sites land west of Oxford in Eynsham, Salt Cross Garden Village and Witney. Opportunities for significant economic and housing growth require new and upgraded infrastructure. • A new Park and Ride is currently part constructed and a priority is to connect this to the road network. • Upgrades to the A40 between Eynsham and Oxford are in planning and procurement phase, including bus lanes and active travel. This is funded and needs to be delivered as quickly as possible. • An active travel route from Botley to Eynsham is critical. • Bringing forward the garden village, addressing viability challenges at both Eynsham and Salt Cross requires strong leadership and coordination between WODC and Oxon CC and the lead promoters/developers. • The Salt Cross development should aim to deliver against the existing site allocation early, while not compromising the opportunity to achieve a greater full site potential in line with the WODC early-stage plan. A comprehensive strategic vision is needed for this area, bringing together existing and future site allocations and infrastructure planning.

Indicative housing potential	Indicative jobs potential	Description / issues
Oxford East		
Circa. 1,500	TBC	• This area comprises Oxford Brookes University main campus, the John Radcliffe and other hospitals and OU campus at Old Road and the allocated sites to the East of the city, including land north of Bayswater Brook. • The biggest single opportunity here is the redevelopment of the Warneford Hospital, in addition a long-term strategy is needed, led by the health authorities, to renew and consolidate its provision in this area. • The immediate opportunities here for new homes are less substantial than in other areas, but the area is significant due to the opportunities to enhance the co-location of clinical services, research and industry led innovation in medical science and technology; and as home to Oxford Brooks University, the long term development of that important institution needs to be considered. • The other priority for this area is to enhance access by public transport and active travel to reduce acute traffic congestion and allow for easy access to the medical facilities both for staff and patients as well as for residents.

Indicative housing potential	Indicative jobs potential	Description / issues
Abingdon, Culham and Dalton Barracks		
Circa. 8,750	Circa. 4,000	• The Abingdon area offers transformational scale opportunities at both Culham Campus and Dalton Barracks either side of the town. • At Culham Campus, which has been identified as a UK priority AI zone, the power supply is ideal for data / heavy power uses as the old reactor is decommissioned. Opportunity for substantial mixed use development with 3,500 homes next to the Campus. • The renewal and intensification of the employment / industrial heart can be achieved with a priority on establishing links to adjacent residential site allocations and delivering these alongside better services from Culham station and enhanced road and active travel links to Didcot by building out the HIF 1 scheme. • There are considerable opportunities to link to Abingdon in the west and on to Dalton Barracks further west. Sustainable bus links to surrounding villages, Harwell and Oxford including hospitals. Culham itself would benefit from improved rail services via Oxfordshire Metro proposals and renewal of rolling stock. • At Dalton Barracks and Abingdon Airfield, to the northwest of Abingdon, the existing MOD site is due to close. There is an opportunity here to provide a 'green chain' link back to Abingdon and to increase the site allocation (currently for 1,200 homes) as a well-connected and sustainable urban extension rather than isolated new settlement. A Masterplan is required to assess the full site potential while plans are developed for existing site allocation (1,200) to be brought forward early without prejudicing opportunity for wider scale allocation in a future plan. The site also offers an important opportunity to provide housing for MOD veteran to increase retention of skilled workers in area and to reduce disruption for families of veterans leaving the service.

Indicative housing potential	Indicative jobs potential	Description / issues
Milton Park and neighbouring employment and residential sites		
Circa. 5,500	Circa. 10,000	• Milton Park is Oxfordshire's largest and most successful business park, adjacent to significant housing site allocations. In a high-quality parkland setting with active travel routes around the site, with some town centre facilities including a gym and food outlets. • Good vehicle links to surrounding villages which supports petrol station/garage, pubs and local shops. • Considerable inward investment of £367 million for Milton Park was recently secured. An extant LDO has allowed the employment sites to be developed at a nimble pace and to a high quality. • The area's sustainability would be enhanced by addition of local housing reducing the need for commuting. • Adjacent residential sites have been allocated and need to be brought forward and integrated to existing amenities and those under development now. • Good links for workers to surrounding area by bus and by bike have already achieved significant modal shift at Milton Park. • Further active travel links, including a ped/cycle bridge across the A34, are envisaged. • The former Didcot A Power station site is under pressure for numerous data centres, but these proposals offer low job density and power challenges, which means that a more mixed economic and housing offer may be beneficial here. • The Area is allocated as an Enterprise Zone and achieving economic growth here has significant benefits to the whole county due to opportunities for business rates retention.

Indicative housing potential	Indicative jobs potential	Description / issues
Didcot Central		
Circa. 7,500	TBC	• Most of the allocated housing sites in central Didcot are underway with more to follow, but the slow delivery of the new health centre and HIF1 road scheme has put public confidence under pressure. These schemes need to be brought forward urgently. • Allocated sites include Didcot North East, Ladygrove East, Vauxhall Barracks, Didcot Gateway. • There are opportunities in central Didcot particularly some sites adjacent to station with existing low density town centre uses which offer opportunities to improve placemaking. • These are primarily brownfield redevelopment sites, including some in public and Homes England ownership. • The Didcot Technology Park will be located to the north and will be developed using a Local Development Order. The scheme is delayed due to the need for power connections and progress on the HIF1 scheme.
Harwell		
TBC	TBC	• Harwell Innovation and Science Campus is an existing unique, nationally significant economic cluster with opportunities to expand. • Enhancing the sustainability of the location is crucial to support new development here, including allocating land for housing to reduce the need to travel and enhancing active and public travel options to Didcot and its existing allocated housing sites. • Opportunities for further science development and housing.

Indicative housing potential	Indicative jobs potential	Description / issues
Bicester		
Circa. 12,000	Circa 12,000	• Power is a key constraint which Homes England and OGC are working with CDC and the energy companies to address. • Residential sites to the northwest of Bicester also require implementation of the Howes Lane A4095 link road and are facing viability challenges which the ATLAS team is supporting Homes England and CDC to assess. • A southeast perimeter road is needed for site development to the southeast of Bicester. • The implementation of East West Rail requires the removal of a level crossing in central Bicester and a replacement solution to be delivered as part of that scheme. • Puy du Fou could offer major new leisure attraction to complement Bicester Village, but sustainable travel solutions need to be considered to avoid overload and congestion. • Bicester Motion offers significant new employment potential in an edge of town location although challenges exist to realising the full potential of that relatively sustainable location close to Bicester North station.
Banbury		
Circa. 5,000	TBC	• Homes England and CDC are currently working together to scope a potential commission for a new spatial framework for Banbury, which offers the opportunity for increased residential in the town centre, the consolidation of jobs, placemaking, an upgrade to the canalside and enhanced access to the station. • A Masterplan / spatial framework is needed both to address challenges in central Banbury and to agree strategic transport priorities / allocate land to these and to identify scope for additional town adjacent growth. • The significant retail and leisure provision in the town centre needs more footfall to retain vitality and to support the strategic location of Banbury as a gateway to the Midlands. These features make the town very significant both for housing and employment growth potential.

Indicative housing potential	Indicative jobs potential	Description / issues
Carterton and Brize Norton		
Circa. 6,800	Circa. 3,000	• There is an opportunity for significant economic growth and coherent placemaking in and around Carterton, supported by passenger travel, freight and logistics infrastructure. • The Strategic Defence Review³⁵ identifies Brize Norton for further investment. • Meanwhile the existing Carterton town centre needs regeneration and increased residential development within the existing centre and built form. There is also a need to tackle active travel routes to and from the centre and towards new settlements on the edges. • Aspiration for Western Rail link between Oxford-Carterton-and beyond. • Opportunity in line with Government Defence Housing Plan to provide housing for MOD veterans to increase retention of skilled workers in area and reduce disruption for families of veterans leaving the service.
Berinsfield and Chalgrove		
Circa. 5,000	TBC	• At Berinsfield, land to the east of the A4074 has been allocated for significant residential development that could help to achieve regeneration of the existing town and better facilities for residents there in addition to new homes integrated into existing built form. • Chalgrove Airfield is a brownfield allocated site. Homes England is progressing work on the project through ongoing engagement with local partners and stakeholders. The emerging proposals include onsite public transport infrastructure to support sustainable travel to Oxford and surrounding areas, as well as highways upgrades at Stadhampton/Chiselhampton.

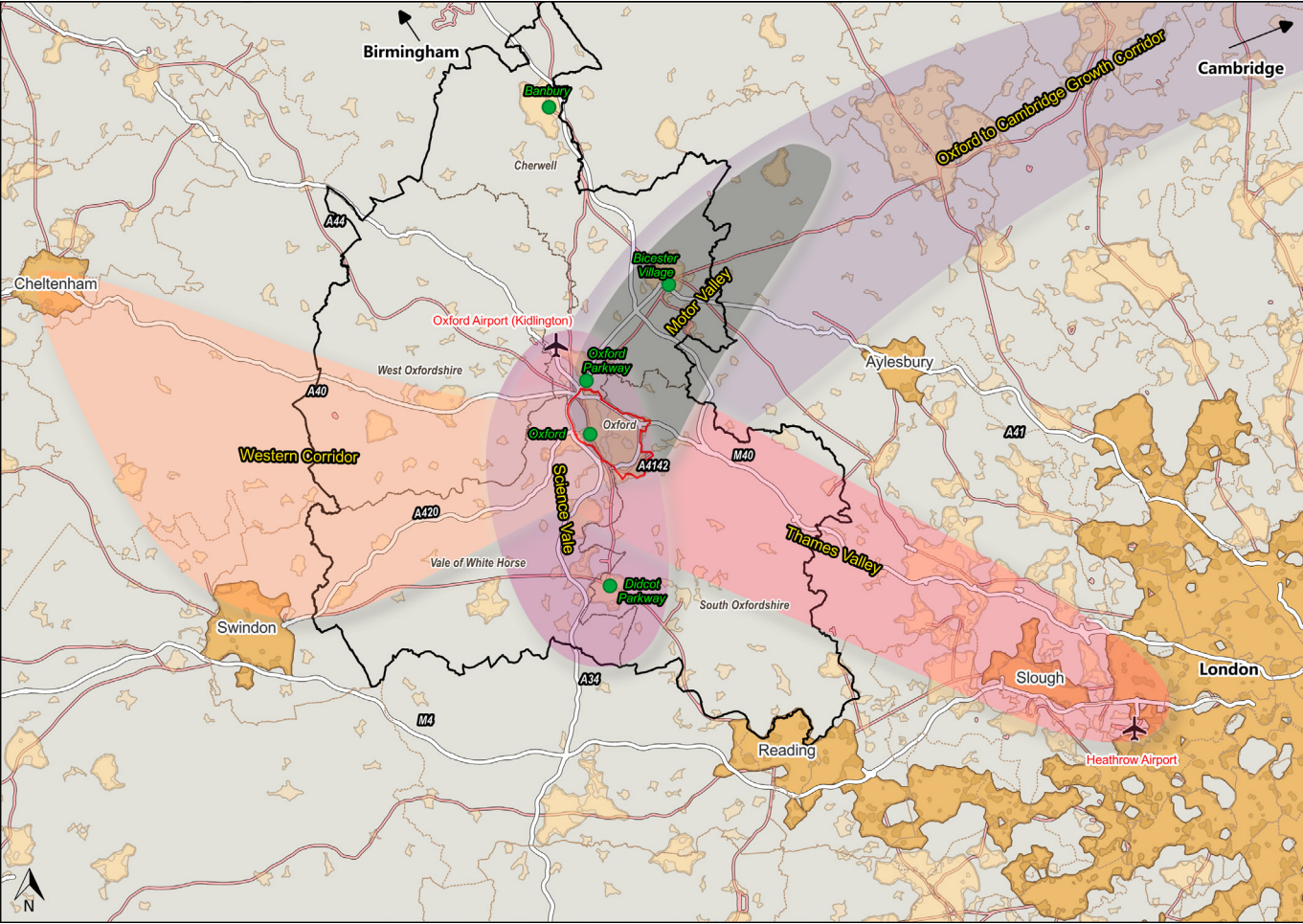
35 [The Strategic Defence Review 2025 – Making Britain Safer: secure at home, strong abroad – GOV.UK](#)

Proposed New Town in Oxfordshire

Indicative housing potential	Indicative jobs potential	Description / issues
Heyford Park		
9,000 in addition to existing housing; potential for more with additional land and suitable infrastructure.	Circa. 1,500	• Recommended as a possible New Town by New Towns Taskforce. • Needs to improve sustainable links to the existing railway stations at Heyford and Bicester and probably in longer term a new station is needed at Ardley. • The land is predominantly in single ownership. • Potential to expand existing border to south with land in college ownerships. • Biodiversity Net Gain challenges here need to be addressed by support for reprovion offsite. • Heritage challenges can be utilised and embraced but there needs to be a sensible solution to preserving existing hangar buildings for mixed use through intensification of use between non listed buildings to support sustainable clusters of local employment and to optimise density on this brownfield site. Listed hangars provide a particular challenge to the masterplan. • The current planning application exceeds the existing site allocation (proposing 9,000 more houses than those already built which number around 1,200). For a New Town there is a need for more critical mass. • Motorway junction improvements may be required. • There is a potential clash with the Strategic Rail Freight Interchange proposed adjacent. • Need to consider cumulative impacts with this and other developments nearby including the proposed Puy de Fou tourist attraction.

Annex C – Maps

Map 1: Oxford Strategic Links



Map 2: Opportunity Areas

