

Communities and Local
Government, SEEDA,
Oxfordshire County
Council and Cherwell
District Council

**Economic and Social
Impacts of a Potential
Eco Town at Weston
Otmoor**

Final Report

Communities and Local
Government, SEEDA,
Oxfordshire County
Council and Cherwell
District Council

**Economic and Social
Impacts of a Potential
Eco Town at Weston
Otmoor**

Final Report

January 2009

Ove Arup & Partners Ltd
13 Fitzroy Street, London W1T 4BQ
Tel +44 (0)20 7636 1531
www.arup.com

This report takes into account the
particular instructions and requirements
of our client.

It is not intended for and should not be
relied upon by any third party and no
responsibility is undertaken to any third
party

Job number 207322

Job title	Economic and Social Impacts of a Potential Eco Town at Weston Otmoor	Job number	207322
-----------	--	------------	--------

Document title	Final Report	File reference	
----------------	--------------	----------------	--

Document ref

Revision	Date	Filename	Report3.doc		
Draft 1	09/08	Description	First draft		
			Prepared by	Checked by	Approved by
		Name	CT/KF/TC	CT/KF	CT
		Signature			
Draft 2	10/08	Filename	Draft Final Report V2		
		Description	Amendments following client comments		
			Prepared by	Checked by	Approved by
		Name	CT/ KF	KF	CT
		Signature			
Final	14/09	Filename	Final Report		
		Description	Amendments following final client comments		
			Prepared by	Checked by	Approved by
		Name	CT/ KF	KF	CT
		Signature			
		Filename			
		Description			
			Prepared by	Checked by	Approved by
		Name			
		Signature			

Issue Document Verification with Document

Contents

	Page
Executive Summary	1
1 Introduction	10
1.1 Background and Overview	10
1.2 Study Brief	10
1.3 Impact Context	11
1.4 Structure of this Report	12
2 The Weston Otmoor Proposal	13
2.1 Introduction	13
2.2 Location and Current Site Characteristics	13
2.3 The Masterplan and Land Use Budget	15
2.4 Demographic Profile of Residents	17
2.5 Residential Proposal	17
2.6 Employment Proposal	18
2.7 Community Proposal	21
2.8 Transport Proposal	22
2.9 Delivery Timescale	23
2.10 Conclusions	24
3 Regional and County Context	25
3.1 Introduction	25
3.2 Growth Forecasts	25
3.3 Housing Completions and Affordability	28
3.4 Employment Forecasts	31
3.5 Sectoral Employment Growth	32
3.6 High-tech and Knowledge-Based Sectors in Oxfordshire	33
3.7 Conclusions	37
4 Profiles of Bicester and Kidlington	38
4.1 Introduction	38
4.2 Overview of Bicester and Kidlington	38
4.3 Population trends	39
4.4 Business and Employment Trends	41
4.5 Travel to Work Distances	41
4.6 Educational Attainment	44
4.7 Knowledge economy in Cherwell	45
4.8 Property Markets	46
4.9 Retail	51
4.10 Conclusions	54

5	The Future of Bicester and Kidlington Without the Proposal	55
5.1	Emerging Regional Policy	55
5.2	Regional Economic Strategy	56
5.3	Evidence of the Bicester Prospects	58
5.4	Additional Employment Capacity in Bicester and Kidlington	60
5.5	Future Economic Challenges	60
5.6	Infrastructure Capacity	60
5.7	Retail and Services	61
5.8	Conclusions	61
6	Population and Housing Impact of the Eco Town	63
6.1	Introduction	63
6.2	Evidence of Build-out Rates	63
6.3	Assessment of Impact	67
6.4	Conclusions on Population Impact	68
7	Employment Impact	70
7.1	Introduction	70
7.2	Additionality, Displacement and Growth Scenarios	70
7.3	Non B1 Uses	74
7.4	Timing of Employment and Housing Provision and Commuting	74
7.5	Relationship to the Economic Strategy	77
7.6	Conclusions	78
8	Social and Community Impacts	80
8.1	Introduction	80
8.2	Health and Well Being Services	80
8.3	Education Facilities and Children’s Services	81
8.4	Emergency Services	85
8.5	Community Facilities	87
8.6	Basic Requirements	88
8.7	Conclusions	89
9	Overall Conclusions	91
9.1	General Conclusions	91
9.2	Specific Conclusions	91
9.3	Wider Conclusions	92

Executive Summary

The Study and this Report

- i. The brief for the study was to assess objectively the potential economic and social impact of the Weston Otmoor Eco Town proposal, and this is the subject of this report. The study has been undertaken in two stages.
- ii. The first stage of the study identified the existing socio-economic conditions and key issues facing Bicester and surrounding settlements, which form the context for assessing the impact of the proposed Eco Town. It was also concerned with assessing the likely deliverability of the current economic development strategy and spatial plan for Bicester and other significant nearby settlements, such as Kidlington, and the anticipated outcomes in the period 2008-2026. It included a workshop with stakeholders.
- iii. The second stage of this study examined the impact of the proposed Eco Town on Bicester and other nearby settlements. Its impact on the deliverability of the current planning and economic development strategy and on existing infrastructure capacity was considered. The second stage also included a workshop with stakeholders.

Background to Eco Towns

- iv. The Eco Towns initiative represents a policy response to a requirement for increased housing supply and for mitigation of and adaptation to climate change. The Government's intention is that the first Eco Towns will begin construction by 2010, with five eco-towns by 2016 and up to ten by 2020. A short list of 15 potential sites for Eco Towns was announced by Communities and Local Government in April 2008 and a programme of evaluation and consultation is currently underway.
- v. One of the shortlisted sites is the Eco Town proposed at Weston Otmoor on a site located to the west of the M40 and approximately three miles south west from Bicester. The purpose of this study was to assess its economic and social validity and impact on a sub-region, which includes the existing settlements of Kidlington and Bicester. These socio-economic impacts will be an important consideration, alongside the results of other impact studies, e.g. for transport and deliverability, in determining whether the location is appropriate for an Eco Town and whether the proposed form of development (scale, mix etc) is the most appropriate for the area.
- vi. The Eco Town is potentially of considerable scale – creating approximately 10,000-15,000 dwellings and up to 15,000 jobs. As such it would be a very significant change in the area. The proposal also includes retail space; leisure facilities; primary and secondary schools; healthcare provision and other community facilities. A package of transport schemes is also proposed, including investment in the East West rail scheme, a tram network and other public transport schemes, a park and ride facility, improvements to the A34/M40 junction and demand management, including controls on car access to the site. Overall, the proposal may evolve as it progresses to more detailed design and the assumptions on socio-economic profiles, employment and transport are crude at this stage.

Area of Impact

- vii. The main potential area of impact is on the settlements of Bicester and Kidlington both within the area served by Cherwell District Council. Bicester is a market town of about 30,000 population and Kidlington is a very large village of around 14,000 population.
- viii. The strategy set out in the emerging South East Plan is to promote Bicester as a new location for higher value and knowledge based industries associated with the Oxford Cambridge Arc, and to reduce its dormitory function. Additional new employment development in Oxfordshire (including development in eco towns or north of Oxford) will need to ensure that it does not risk undermining these improved fortunes.

- ix. Specifically, Policy CO1 of the emerging RSS for the South East sets out the broad approach to development in the Central Oxfordshire area, which focuses growth in Bicester, Didcot, Wantage and Grove and the built up area of Oxford, with limited development elsewhere. The aim of strategy is to build on the sub-region's existing economic strengths in education, science and technology. This approach is supported in the Panel Report and the Secretary of State's Proposed Changes. Developing economic activity in Bicester is seen as essential to reduce its current dormitory function. The Panel Report accepted the objective to develop Bicester as a location for high-tech growth, but cautioned that Bicester did not yet have a profile for high-tech activity. The Panel recognised that any further releases of employment land on the northern edge of Oxford besides the safeguarded site at Peartree, could be adversely competitive to Bicester's aspirations.
- x. Evidence exists that the most intense potential negative impacts will be on Bicester in terms of housing and jobs and on employment developments in Kidlington. This is because, whereas Bicester has significant plans for both new housing and employment, plans for Kidlington mostly relate to employment and the development of science-based activities. It is possible to rule out any detrimental economic impacts in Oxford City because of the scale and strength of the economy, and in the more rural areas because of the limited potential for new development.
- xi. Bicester has experienced significant housing and population growth in the last two decades and benefits from relatively high economic activity rates and a young population. However, the economy has consistently under-performed and there has been difficulty in achieving a desirable balance between housing and employment. In particular, Bicester has struggled to achieve significant employment growth to match housing growth and to attract higher value-added economic activities including those associated with the 'knowledge' economy in which Oxford is comparatively strong. Part of this problem lies in the poor employment floorspace offer, which is dated and unsuitable for the needs of modern businesses. There is also an under-performance in Level 3 skills or higher – in contrast with the higher level of these skills observed in Oxfordshire as a whole.
- xii. Bicester has a relatively high proportion of out-commuting, as a significant proportion of residents travel further away to obtain higher paid positions of employment – evidenced by travel to work data and the difference observed between average full-time wages in Bicester and residents' household incomes. Its road network is also heavily congested (especially the A34 and Junction 9 of the M40) – acting as a constraint against further development.
- xiii. Most recently local stakeholders have suggested that Bicester has reached a turning point in its economic fortunes. There are also significant new developments in the pipeline, including new business space and leisure facilities. It is these improved fortunes that are potentially most vulnerable to development of the Eco Town or other developments north of Oxford. This view is confirmed by the emerging South East Plan.

Existing Prospects for Bicester and Kidlington

- xiv. The Oxford/Central Oxfordshire area has been designated as a 'Diamond for Investment and Growth' in the Regional Economic Strategy, with the potential to 'act as a catalyst to stimulate prosperity across wider areas, and offer scope for further sustainable growth based on targeted investment in their infrastructure'.
- xv. The local economic development strategy for Cherwell sets out the direction for the Cherwell economy including Bicester. A key cross-cutting objective of the strategy is to balance appropriately Cherwell's population growth, economy and infrastructure. Thus, the core economic objectives are to ensure the creation of additional employment to balance predicted population growth, increasing the rate of growth in the 'knowledge' sector and improving the quality and offer of commercial business space.

- xvi. The vision outlined for Bicester is to become a more attractive work location for its more qualified and higher earning residents and for it to become a significant location within the Oxford-Cambridge Arc. This is based on growth in science and technology based businesses, exploiting innovations and spin-outs from academic research. It also aims to build upon its strengths in materials engineering and bio-technology. Overall, there is an emphasis that Bicester should grow its 'knowledge' economy.
- xvii. The vision for Kidlington builds on its relationship with Oxford, a quality centre for office- and laboratory-based businesses, especially in the bio-technology sector and other spin-off activities. The strategy is to retain the aspects of village life that make up much of its attractiveness as a place to live.
- xviii. Delivering the Cherwell strategy is feasible but challenging. It is likely that some form of 'step change' will be required particularly for Bicester to make real progress in the 'knowledge' sector. Importantly, a number of factors now make this a possibility as outlined further below.
- At the South East Plan EIP the demand for employment land in Oxford was examined. It was concluded in the Inspectors Report that supply was constrained, with for example, only 4-5 years of supply left at both the Oxford Science Park and Oxford Business Park. In the absence of further sites coming forward in Oxford, this would suggest a high potential for overspill of activity towards Kidlington and Bicester due to availability of sites.
 - The University of Oxford has a desire to develop land around its existing activities at Begbroke Science Park to the west of Kidlington. The University of Oxford owns 125.5 hectares of land around its Science Park at Begbroke (4.1 hectares) and made a representation for development in the consultation on the Draft South East Plan. The University's future vision is to have space for the development of new University research laboratories that operate outside the current 'departmental' structure and reflect 'sectors' of activity. The core of this would be more innovation space. It also seeks to provide adequate housing for scientists, technologists and supporting staff.
 - Within Bicester a number of recent proposals suggest fragile market interest. The most significant of these is a business park proposal, just off the A41 between the existing Wyevale and Bicester Village retail outlets. Resolution to grant subject to S106 negotiations has been given for an outline planning application for the construction of a 60,000 sq.m. business park incorporating offices and a 150-bed hotel. The Highways Agency has directed that the planning permission should include a restriction, whereby only 25,000 sq.m. can be built until significant improvements to Junction 9 of the M40 have been undertaken. In discussions, the developer, London and Metropolitan, reported that the site will be delivered over a ten year period and that although some employers have already expressed interest in the site, development would not begin until the market conditions have improved. London and Metropolitan estimate that 3,000 jobs would be created on the business park when fully implemented. When this business park is delivered, it will help to improve Bicester's offer in terms of B1 space.
 - The Cherwell employment land report (ELR) identifies five additional sites in Bicester (38.4 ha) and six sites in Kidlington (3.2 ha) as potentially available for development. The sites were a combination of designated but undeveloped employment sites allocated in the Non-Statutory Cherwell Local Plan 2011 and new sites identified by consultants as part of their survey work.
 - If all of these sites were to be included in the Development Plan Document, there would be a total allocation of at least 118 hectares of dedicated employment land in Bicester and 12 hectares in Kidlington. However, it is unlikely that all of the

proposed sites will come forward in the final Preferred Option for the LDF as more detailed analysis and consultation will mean that some sites are rejected.

- xix. Realisation of some of the new employment proposals is critical to demonstrating the market potential of the available sites within Bicester and Kidlington. The Bicester business park proposal potentially has sufficient critical mass to realise this demonstration effect. Over and above this, there is scope to develop a more proactive approach to marketing Bicester's profile and strengthen links with Oxford City. This is because the Oxford sub-region has world class prestige and visibility, science, and a community of expertise to build on.
- xx. The recent retail study commissioned by Cherwell to assess future retail demand, concludes there is limited capacity for additional convenience floorspace in the Bicester town centre, and that this capacity is likely to be taken up by extensions to existing stores or a new 'town centre' format food store. It is also clear that forecast expenditure growth is sufficient to support a moderate increase in comparison goods floorspace in Bicester. This assessment does not take account of the additional growth arising from the South East Plan, nor the scope for linked trips with Bicester Village – particularly for convenience provision. Both of these factors strengthen the potential for the successful development of new retail development at Bure Place and of possible additional developments.
- xxi. The retail study also concludes that there is scope for significant increases in capacity for additional convenience floorspace in the Kidlington area though the population is likely to remain static. This capacity is likely to be taken up by extensions to existing stores or a new format food store. However, there is probably a lack of suitable sites to accommodate this growth. Forecast expenditure growth is sufficient to support a considerable increase in comparison goods floorspace in Kidlington, although again sites may be limited. There is also capacity for further provision of comparison floorspace including retail warehousing in out of centre locations.

Population Impacts of an Eco Town at Weston Otmoor

- xxii. Parkridge has suggested that the proposed Eco Town, when fully completed, would provide housing for 15,000 households – and in their view an approximate population of 35,000 people. Some local authority stakeholders consulted in this study have suggested that a population of 40,000 is more likely on the basis of 15,000 households. A relevant consideration is the impact of providing 15,000 additional households and the relationships to existing planned development and the emerging RSS. The key questions are the extent to which the 15,000 households will be fully additional to the area, whether they will displace some or all of the planned provision in the local area and the impact that this displacement may have on the surrounding area.
- xxiii. Discussions with Parkridge indicate that their intention is for housing (and therefore population) to be delivered over a 20-year period with around 500 to 1,000 dwellings delivered per annum with the higher levels occurring towards the back end, once the town has been established. This implies an additional population of at least 1,000 – 2,000 people per annum.
- xxiv. Delivery of this level of housing is also highly significant in a wider Oxfordshire context as whole as housing completions have until recently averaged just over 2,000 per annum. For the Eco Town to be additional this completions rate would need to increase.
- xxv. A number of factors suggest potential for displacement of new growth from the sub region to Weston Otmoor.
 - Bicester has offered substantial capacity for new housing over the past 20 years or so and continues to do so. The supply context means that Cherwell is one of the more affordable parts of the South East suggesting limited evidence of pent up local demand. Whilst the emerging RSS suggests the Cherwell minimum provision

should be 670 dwellings per annum, and household projections suggest a requirement for 900 dwellings per annum, Cherwell's LDF issues and options paper suggests that there is substantial capacity to meet these or even higher dwelling requirements

- Aside from affordable housing, given that there is no real evidence that housing supply in Cherwell has failed to meet normal market demand, the implication is that the case for the Eco Town is based on meeting wider regional housing requirements. It is judged that the success of the town in this role depends crucially on its ability to provide access to employment opportunities within the town or through commuting and appealing to home seekers and investors at this wider scale.
- xxvi. Communities and Local Government guidance suggests that 30-50% of development at an Eco Town should be affordable. On this basis Parkridge have assumed that at least 30% of the housing offer at Weston Otmoor would be affordable. The final percentage would be determined at a later date and would consider factors such as market conditions and central and local government policy.
- xxvii. On an informed judgement basis, it is considered that there would be elements of both additionality and displacement, which is to say the Eco Town would both create its own market and draw growth away from Bicester. It is unlikely to draw all growth, given Bicester's current success and improving image. The Eco Town will also have as a differentiator the benefits of eco credentials but much does depend on how the developer exploits this through more detailed planning and the relationships to other defining factors such as relative affordability and employment and service facilities, as well as market conditions. It may also be the case that future development in Bicester may adopt eco-principles and be equally attractive, or that the established and historic nature of Bicester provides a counterbalance. The consultant team's general assumption is that the benefits of an Eco Town in this location can never generate sufficient additional demand to avoid displacement from Bicester.
- xxviii. Based on the evidence available, the consultant team have concluded that about half the planned housing growth in Bicester could be diverted to Weston Otmoor. This reflects factors such as the proportion of affordable housing, the greater proximity to Oxford and the additional choice offered by an eco development. The consultant team's judgement is that it is more likely that if Weston Otmoor fails to achieve its market, this will be reflected in slower build-out of the Eco Town, rather than additional displacement.
- xxix. Given the large upfront infrastructure costs suggested by the proposals for the Eco Town, it is likely that slower build out rates could have an impact on viability and the ability to deliver infrastructure and employment. This is because slower build out rates will be likely to lengthen payback on these investments. Testing these viabilities is beyond the scope of this study, but is important that the sensitivities of costs and build out rates are fully tested to avoid the need for compromises on commitments to be made at later stages in the scheme.
- xxx. As an established location with improving rail links on the Oxford Bicester and Marylebone lines and without the Eco Town, Bicester is a competitive location for new residential development. Bicester also has a significant pipeline permission for 1,585 homes in South West Bicester (for which outline consent was resolved conditionally in January 2007). Based on the Cherwell Issues and Options paper of May 2007, the housing capacity of Bicester is potentially very significant.
- xxxi. Ensuring the provision of affordable housing in the Eco Town to the level suggested by policy is also important in mitigating displacement impacts. This is particularly the case as the provision of affordable housing is the most obvious gap in the current local market.

- xxxii. The additionality and displacement issue is also dependent on future planning policy and the extent to which, if it goes ahead, the Eco Town is used to meet minimum housing provision targets or to provide additional provision above these levels.

Employment Impacts

- xxxiii. The scale of employment space provision to accommodate 15,000 jobs proposed as part of the Eco Town is substantial and as a single location would be similar to some of the largest and most successful business parks in the UK.
- xxxiv. The indicative figures from Parkridge suggest that the balance of employment will be dominated by B1 uses with all the employment (excluding retail & leisure) being created by 2020. The suggested quantity of B1 space is approximately 2,400,000 sq ft. Taken over a 20 year time period, this is equivalent to around 120,000 sq ft per annum. This can be immediately compared with Experian forecasts for B1 type sectors which forecast an annual net additional requirement for B1 space in Oxfordshire in the order of 150,000 sq ft. In this context, the proposed quantum of B1 is equivalent to 65% (on a jobs basis) of the total net increase in the B1 requirement for the whole of Oxfordshire in 2008 to 2026. The implication is that either the Eco Town is going to displace a very high proportion of growth from elsewhere in the county or the Eco Town will be a regional scale facility capable of creating and attracting additional new markets.
- xxxv. Experian forecasts suggest growth of 6,781 jobs in Cherwell and 39,557 jobs in Oxfordshire as a whole in the period 2008 to 2026. The projected growth sectors in Cherwell are Health, Business Services, Hotels & Catering, Other Services, and Retailing. The Experian estimate for Cherwell is thus clearly less than half the expected 15,000 jobs in the Eco Town.
- xxxvi. The analysis implies that if it is to achieve targets the Eco Town would have to not only simply absorb the anticipated job growth in Cherwell District, but also displace jobs from elsewhere. In this case displacement means relocation of existing businesses and the diversion of growth from other locations. Displacement would necessarily put employment proposals in Bicester at strong risk. However, in addition, since there is realistically not sufficient growth forecast in Oxfordshire, the Eco Town would need to create its own market capable of attracting new demand and displacing existing occupiers from elsewhere.
- xxxvii. The scale of B1 floorspace proposed by Parkridge also implies that it could represent a business location of regional scale. Attraction of uses at this regional scale might reduce overall displacement effects locally. In considering the potential role of employment floorspace at the Eco Town as a regional scale entity in a single location, a number of comparators can be considered. None of the comparators has achieved as fast a rate of employment development as suggested for the Eco Town. This means that there must be severe doubts as to whether Parkridge's assumptions can be realised, particularly for specified uses.
- xxxviii. Reference to comparators also highlights the issue of competition – there are other sites which are arguably better-located than the proposed Eco Town. These include land at Peartree which is safeguarded in the Local Plan for employment uses. Oxford's Core Strategy Preferred Options Paper states that 'the land occupies a strategically important position at the northern edge of Oxford, and offers the opportunity for a high-quality development to create a landmark 'northern gateway' to the City'. The location is being taken forward through the Northern Gateway Area Action Plan. If an employment site is identified this would represent competition within relative proximity (and crucially closer to Oxford) than the proposed Eco Town.
- xxxix. Business sites located to the south of Oxford could also represent strong competition, especially for more high-tech and knowledge based employment at a regional scale. An area to south of Oxford has recently been rebranded as the Science Vale UK (previously

'Quadrant') with the intention of building up further the base of high tech activity in the area.

- xli. There may be scope to mitigate the potential impact on Bicester, by requiring the Bicester business park to go ahead before employment land could be released in the Eco Town.
- xlii. It is judged that the assumptions made by the developer on employment are largely an 'act of faith' and that this is an area that is fraught with uncertainty. The scale of employment proposed for the Eco Town is of a significant order – catering for approximately 15,000 jobs, and there is no evidence that a single location, typically taking the form of a business park, has achieved this level of growth in a 10- or 20-year timescale. The developed space will certainly have to be of a very high quality to achieve this growth. The Eco Town employment offer is likely to be 'better' than Bicester's offer as it will comprise high quality sites and more modern stock with closer proximity to the motorway and Oxford.
- xliii. There is potential for a larger share of B2 and B8 uses than currently included in Parkridge's proposals, although Parkridge has suggested that these uses would not be particularly sought or welcome.
- xliiii. In the judgement of the consultant team the most likely outcome is that the employment component of Weston Otmoor would be likely to lag behind housing, meaning that the proportion of households out commuting for work could be high for many years. Nevertheless, the employment provision will add to the stock of potential sites in Cherwell and as such is likely to support some additional growth in the economy.
- xliv. It is therefore expected that the employment space at the Eco Town will compete with rather than complement provision at Bicester and Kidlington. The scale of growth envisaged at the Eco Town must mean that it will both absorb and displace growth.

Social and Community Impacts

- xlv. Oxfordshire County Council's guide on 'Infrastructure and Service Needs for New Development' states that in general there are no major areas of 'spare capacity' within existing council services, and the earlier analysis of existing capacity for the identified social and community infrastructure did not identify any significant spare capacity. The assumption is that the Eco Town would need to provide its own social and community infrastructure services and facilities to support its own residential population. Further, it is assumed that the integration of such facilities would be integral to the Eco Town proposals in order to meet sustainability principles and reduce the need to travel. Overall the following conclusions have been drawn.
 - The provision of social and community infrastructure within Weston Otmoor would need to be commensurate with the demand created by the new residential population.
 - Provision would need to be made for general practitioners and other primary care services, such as children's services, mental health care and community nursing.
 - The scale of proposal is not sufficient to justify the provision of a new hospital; however, the additional demand generated by the increased population is likely to mean that existing facilities may need to be reviewed.
 - The scale and proximity of Weston Otmoor to Bicester may have a destabilising effect on Bicester's local primary care services, as it would directly compete for investment and may have implications for new infrastructure already planned for Bicester. Mitigation measures would need to be explored.
 - Initial modelling undertaken by Oxfordshire County Council suggests that the child yield may be greater than currently assumed in Parkridge's early assumptions, and therefore the education offer would need to be increased. There would be a need

to plan for the likely short- to medium-term peak in demand for primary and secondary school places. In the long term, the provision of additional schools at Weston Otmoor could create direct competition for investment. Mitigation measures would need to be explored.

- Weston Otmoor would need to make provision for wider children's services, including social care, integrated services for under 5's, children's centres, early education and childcare. Sufficient provision and flexibility would need to be maintained within the masterplanning process in order to ensure that such facilities can be accommodated as required, for example, in conjunction with community centres or school buildings.
 - Investment would be required to ensure adequate local provision for emergency services. Investment may also be needed to deliver services and facilities in the wider area associated with the demand generated by the additional population. Specifically, an additional police station would be required; and either expansion of fire and rescue services at Bicester or an on-site fire station at Weston Otmoor.
 - As suggested in the Eco Town proposal, locating community facilities within the heart of the community would be important. The scale and nature of such facilities would need to be directed by the Council, other key stakeholders, service providers and the community. Long term maintenance costs would be an important consideration.
 - The scale of development would not be sufficient to justify the provision of higher-order services such as acute hospitals, theatres, etc; therefore it would be necessary for Weston Otmoor residents to travel to other settlements to meet these requirements.
- xlvi. Overall, at this stage in the process, it is difficult to assess how the Eco Town proposals might be enhanced or their impact mitigated given the lack of detailed information on social and community infrastructure provision. If Weston Otmoor progresses to the next stage, it will be important that detailed demographic forecasting is undertaken by the developer, since this will allow more meaningful discussions to take place as to the likely scale and nature of required services and facilities. Once a more precise proposal has been established, it will then be possible to explore how potential impacts on surrounding communities could be mitigated.

Conclusions

- xlvii. The housing and employment proposals at Weston Otmoor, in combination with existing plans, provide capacity for growth far in excess of existing anticipated demand in the local area. The strategy set out in the emerging South East Plan is to promote Bicester as a new location for higher value and knowledge based industries associated with the Oxford Cambridge Arc, and to reduce its dormitory function. Additional new employment development in Oxfordshire (including development in eco towns or north of Oxford) will need to ensure that it does not risk undermining these improved fortunes. Specifically, there is a significant risk that the Western Otmoor proposal will undermine the emerging South East Plan and the Secretary of State's proposed changes which suggest that additional employment land and housing on the northern edge of Oxford could be detrimental to Bicester's aspirations.
- xlviii. Although there is some scope for the Eco Town to help 'grow' the local economy and offer more housing, the consultants judge that the following outcomes are also likely if the Eco Town goes ahead:
- Although eco-credentials may generate some additional demand, existing activity and planned growth will need to be displaced to the Eco Town, displacing existing and planned future growth in Bicester and Kidlington.

- Bicester will fail to realise its vision and may be less sustainable as economic activities decline.
 - The Eco Town will not necessarily develop in the timescales suggested by Parkridge.
 - Employment growth is likely to lag behind housing growth and it will take many years before these balance.
 - To achieve success the Eco Town will need to increase demand in the local housing market, for example by offering additional affordable housing.
 - To be successful in employment terms the Eco Town will have to act as a regional scale facility, capable of attracting new growth from across the wider region.
- xlix. Other more specific conclusions supported by a range of evidence can be summarised as follows.
- Cherwell is one of the more affordable housing locations in the South East and has received substantial proportions of housing growth in recent years, notably at Bicester. There is no obvious evidence of under provision of housing in the area and, indeed, the existing pipeline of housing is large with a wide range of potential housing capacity evident in the LDF Issues and Options paper. The district is thus not an obvious location for further growth.
 - Many of the economic drivers for the Eco Town, such as the commuting potential via Chiltern Railways, are shared with Bicester or with other locations in the Central Oxfordshire sub region: there are no obvious existing independent economic drivers for the Eco Town.
 - Bicester has experienced rapid growth of population as a result of new housing and now needs to balance this growth with improved employment opportunities as well as better infrastructure and services. These prospects have been delayed by the effects of global credit crunch on property markets, and would be threatened by the Eco Town.
 - The implied trajectory of housing growth of the Eco Town together with existing planned growth in the district represent a more ambitious housing trajectory than has been achieved in stronger growth areas.
 - Within a polycentric urban structure and without the mechanisms available to new towns in the past, it is difficult to see how the requisite level of self containment will be achieved. It is likely that employment will lag behind housing and it is unlikely that new residents will make the 'double move' of home and job within a short period. Even as jobs become available it is unlikely and would be entirely coincidental if resident skills and experience matched employment opportunities. This means that it is important that there is sufficient transport capacity to meet all these flows.
 - The Eco Town would face considerable competition for large scale employment uses from the rest of the County, especially south of Oxford. It is not clear why the Eco Town would have a competitive advantage.
- i. Other conclusions that arise as a consequence of undertaking the study are as follows.
- It is not clear that Weston Otmoor is the only or best option for meeting additional growth objectives in this part of Oxfordshire.
 - There is potentially substantial capacity for further growth of housing and employment in Bicester.
 - Given the large upfront infrastructure costs it is important that the sensitivities of costs and build-out rates are tested upfront to mitigate the need for future compromises on infrastructure, employment and service provision.

1 Introduction

1.1 Background and Overview

- 1.1.1 The Eco Towns initiative represents a policy response to a requirement for increased housing supply and mitigation and adaptation to climate change. The intention is that the first Eco Towns will begin construction by 2010, with five eco-towns by 2016 and up to ten by 2020. A short list of 15 potential sites for Eco Towns was announced by Communities and Local Government in April 2008 and a programme of evaluation and consultation is currently underway.
- 1.1.2 One of the shortlisted sites is the Eco Town proposed at Weston Otmoor on a site located to the west of the M40 and approximately three miles south west from Bicester, and the purpose of this study is to assess its economic and social validity and impact on a sub region including the existing settlements of Kidlington and Bicester. These impacts will be an important consideration, alongside the results of other impact studies, e.g. for transport and deliverability, in determining whether the location is appropriate for an Eco Town and whether the proposed form of development (scale, mix etc) is the most appropriate for the area.
- 1.1.3 The Eco Town is potentially of considerable scale – creating approximately 10,000-15,000 dwellings and up to 15,000 jobs. As such it would be a very significant change in the area. The proposal also includes retail space; leisure facilities; primary and secondary schools; healthcare provision and other community facilities. A package of transport schemes is also proposed, including investment in the East West rail scheme, a tram network and other public transport schemes, a park and ride facility, improvements to the A34/M40 junction and demand management on car access to the site. A more detailed summary of the proposal is set out in Chapter 2.
- 1.1.4 Significant forecast levels of demographic and economic growth are expected in the South East. The Secretary of State's proposed changes to the South East Plan reflect this and in particular planned delivery of new housing in the region. The Secretary of State's proposed changes also suggest an increase in the minimum annual average net additional dwelling requirement in Cherwell District from 590 to 670 (and total in period from 11,000 to 13,400).

1.2 Study Brief

- 1.2.1 The brief for the study was to assess objectively the potential economic and social impact of the Weston Otmoor proposal. The study has been undertaken in two stages.
- 1.2.2 The first stage of the study identified the existing socio economic conditions and key issues facing Bicester and surrounding settlements, and forms the context for assessing the impact of the proposed Eco Town. It was also concerned with assessing the likely deliverability of the current economic development strategy and spatial plan for Bicester and other significant settlements, such as Kidlington, and the anticipated outcomes in the period 2008-2026. It included a workshop with stakeholders.
- 1.2.3 The second stage of this study examined the impact of the proposed Eco Town on Bicester and other nearby settlements. The impact on the deliverability of the current planning and economic development strategy and on existing infrastructure capacity was considered. It also included a workshop with stakeholders.
- 1.2.4 At the outset a number of limitations of to the assessment are worth noting. The first is that the assessment is of a scheme based on only very limited information in an uncertain context based on limited research. The second is that a scheme of the scale of the proposed Eco Town will have clearly have impacts, and it is the significance and potential mitigation of these impacts which is most critical to any decision to proceed. The third issue is that this type of assessment is normally conducted as a comparison with other growth options in a context where the broad scale of growth has already been established, whereas in this case there is a single option and its impact on the existing planning strategy would be significant. The

fourth issue is that even on best evidence the assessment relies on a strong degree of judgement and the 'balance of probabilities' rather than certainty because of uncertainties of the future market and the detail of the scheme.

1.3 Impact Context

- 1.3.1 The main potential area of impact is on the settlements of Bicester and Kidlington. Bicester is a market town of about 30,000 people, and Kidlington is a very large village with a population of around 14,000.
- 1.3.2 Evidence from the study suggests that the most intense potential impacts on Bicester will be in terms of housing and jobs and on employment developments in Kidlington. This is because, whereas Bicester has significant plans for both new housing and employment, plans for Kidlington mostly relate to employment and the development of science-based activities. Any detrimental economic impacts in Oxford City are ruled out because of the scale and strength of the economy, and in the more rural areas because of the limited potential for new development.
- 1.3.3 Bicester has experienced significant population growth in the last two decades and benefits from relatively high economic activity rates and a young population. However, the economy has consistently under-performed and there has been difficulty in achieving a desirable balance between housing and employment. In particular, Bicester has struggled to achieve significant employment growth and to attract higher value-added economic activities, including those associated with the 'Knowledge' economy in which Oxford is comparatively strong. Part of this problem lies in the poor employment floorspace offer, which is dated and unsuitable for the needs of modern businesses. There is also an under-performance in Level 3 skills or higher – in contrast with the higher level of these skills observed in Oxfordshire as a whole.
- 1.3.4 Bicester has a relatively high proportion of out-commuting, as a significant proportion of residents travel to obtain higher paid positions of employment – evidenced by travel to work data and the difference observed between average full-time wages in Bicester and household incomes. Its road network is also heavily congested (especially the A34 and Junction 9 of the M40) and acts as a constraint against further development.
- 1.3.5 Most recently there have been tentative signs that Bicester is reaching a turning point in its economic fortunes, with significant new developments in the pipeline including new business space and leisure facilities. It is these improved fortunes that are potentially most vulnerable to the Eco Town or other developments north of Oxford. This view is confirmed by the emerging South East Plan.
- 1.3.6 Specifically, Policy CO1 of the Regional Spatial Strategy (RSS) for the South East sets out the Regional Assembly's broad approach to development in the Central Oxfordshire area, which focuses growth in Bicester, Didcot, Wantage and Grove and the built up area of Oxford, with limited development elsewhere. The aim of this strategy is to build on the sub-region's existing economic strengths in education, science and technology. This approach is supported in the Panel Report and the Secretary of State's Proposed Changes. Developing economic activity in Bicester is seen as essential to reduce its current dormitory function. The Panel Report accepts the objective to develop Bicester as a location for high tech growth, but cautions that Bicester's market is currently weak, so there is a need to ensure that development to the north of Oxford (which would include the Eco Town), does not adversely impact on this aspiration.
- 1.3.7 It must also be acknowledged that the general economic climate in the UK economy has deteriorated significantly recently, and it is therefore expected that economic progress in Bicester could also be delayed, as much rests on private sector investment.

1.4 Structure of this Report

1.4.1 The remainder of this report is structured as follows:

- **Chapter 2** summarises the proposal at Weston Otmoor at the time of drafting.
- **Chapter 3** analyses the regional and county context.
- **Chapter 4** provides profiles of Bicester and Kidlington.
- **Chapter 5** outlines future prospects for Bicester and Kidlington.
- **Chapter 6** examines the potential population and housing impact of Weston Otmoor
- **Chapter 7** examines economic and employment impacts.
- **Chapter 8** examines social and community impacts.
- **Chapter 9** draws overall conclusions.

1.4.2 A separate Annex Report summarises baseline information in more detail.

2 The Weston Otmoor Proposal

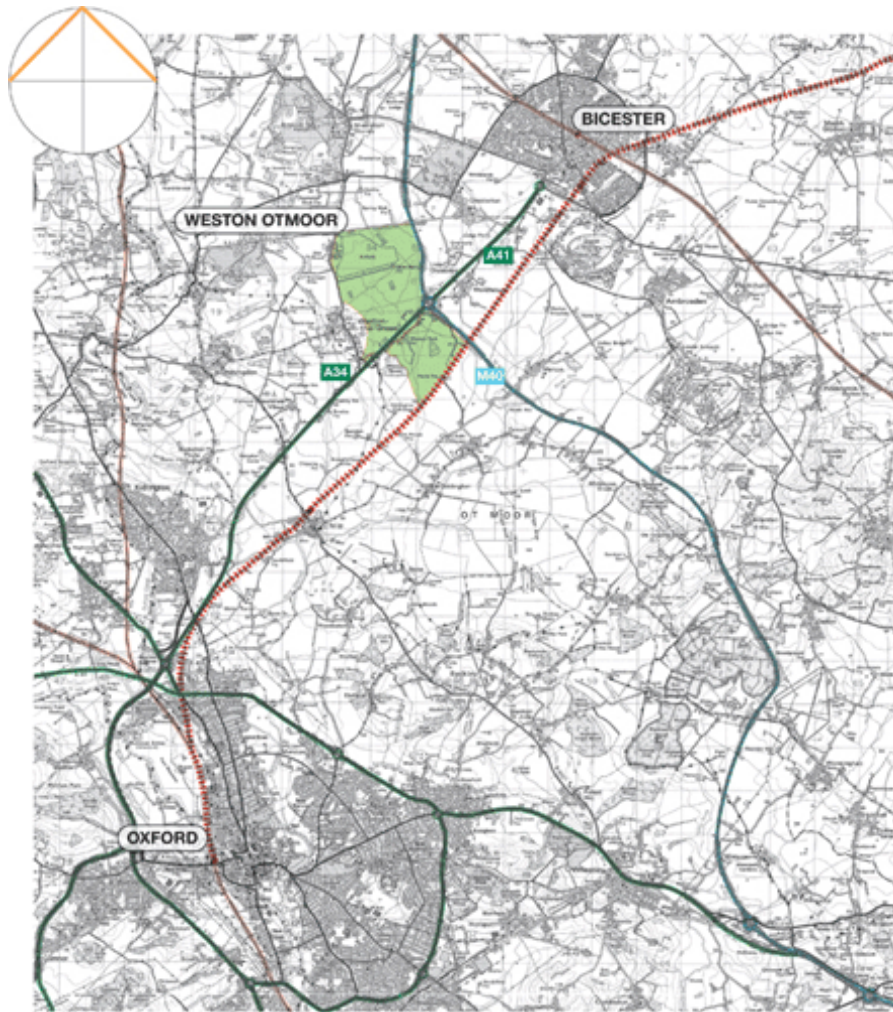
2.1 Introduction

- 2.1.1 This section summarises the key information available about the Eco Town proposals. This is based on material available on the Weston Otmoor consultation website, additional material provided by the promoter, Parkridge Holdings, the final bid presentation (August 2008) and discussions with the promoter. This information formed the basis for the impact analysis.
- 2.1.2 It should be noted that the quantitative data available are necessarily high level assumptions, which have been required in order to, for example, run the transport model. If the proposal progress to the next stage, it will be necessary for Parkridge to undertake further studies to refine these details. These high level assumptions may thus be seen as flexible and if the Eco Town progresses to the next stage, should be refined to meet the requirements of the local authority, stakeholders and the local community.
- 2.1.3 It should also be noted that the information presented in this chapter is based on material provided by Parkridge and it is intended to set the scene for the report, which is concerned with identifying the existing prospects of the area and the impact of the eco-town. It does not represent the consultants' views of how the development may occur in practice, although it is necessary to distinguish 'fact' from 'assumption'. However, chapter 6 (on the economic impact) reviews the assumptions regarding economic activity and employment in the possible Eco Town. It was not part of the brief to assess issues of deliverability or transport impact which are the subject of separate studies, and are clearly major issues that must be taken into account in assessing the Eco Town proposal alongside this work.

2.2 Location and Current Site Characteristics

- 2.2.1 The proposed Eco Town site at Weston Otmoor is located to the west of the M40, at the intersection of the motorway with the A34/A41 (Junction 9) and north of the proposed East-West rail line (Figure 2.1). It lies approximately 3 miles to the south of Bicester. The boundaries of the site have been defined by Parkridge as: the M40 to the east; RAF Weston on the Green to the north; the East-West rail link to the south; and Weston on the Green to the west.

Figure 2.1 Weston Otmoor Location Plan



Source: Parkridge Holdings (2008) Weston Otmoor Consultation Website

2.2.2 The consultation website provided by Parkridge suggested the location was chosen for the following reasons:

- The site is within the Oxford to Cambridge Arc which promotes a nationally-recognised policy for the development of knowledge-based industries
- Connectivity within the Arc is to be provided primarily by the "East-West Rail Link" which adjoins the site
- Weston Otmoor is within the South East England Development Agency (SEEDA) Central Oxfordshire Diamond for Investment and Growth
- The area suffers significant housing stress
- The M40 provides immediate access to the national motorway network

2.2.3 The proposed site measures around 828ha, approximately 16% of which is owned by the Ministry of Defence (MoD). The MoD site is currently used as a parachute training drop zone and a cycling club track, while the remainder of the site is farming land.

2.3 The Masterplan and Land Use Budget

2.3.1 The masterplan as at September 2008 is shown in Figure 2.2 – this has been revised by the promoter since the original submission to Communities and Local Government, to reflect discussions held on environmental factors and green belt issues. The overarching principle for the current masterplan is a long thin site with a central spine of activity, which includes retail and community uses, thus maximising accessibility to services and facilities for Eco Town residents and workers.

2.3.2 The land budget provided by Parkridge has remained unchanged since the original submission and is based on the provision of over 300 hectare of open space and 500ha of built development (Table 2.1). Discussions with Parkridge suggest that it is based on their best assumptions at this stage, although this may clearly change.

Table 2.1 Land Use Budget

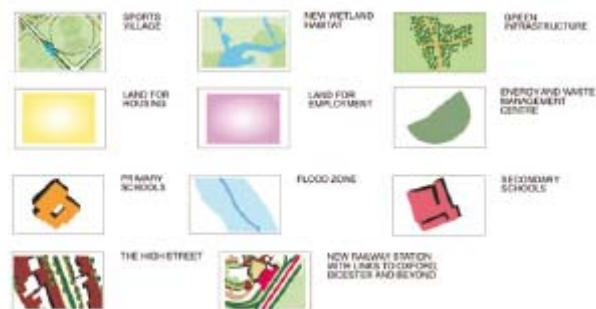
	Land (ha)	Land (%)
Built Development	502	60
Housing	220	27
Employment	80	10
Education	22	3
Retail/ community	10	1
Built community uses	10	1
Housing expansion space	110	13
Other expansion space	50	6
Open Space	311	38
Public open space	56	7
Allotments/ small holdings	105	13
Green infrastructure	150	18
Other	15	2
Park and ride sites	15	2
Total	828	100

Source: Parkridge (2008)

Figure 2.2 Masterplan



Key



Source: Parkridge Holdings (2008)

2.4 Demographic Profile of Residents

- 2.4.1 The proposal assumes 15,000 households would be built as part of the Eco Town. Parkridge have not undertaken any detailed analysis about the likely population profile of the Eco Town or which socio-economic groups might be particularly attracted, or targeted, as potential residents. This is considered to be a key output, if the Eco Town progresses to the next stage.
- 2.4.2 However, for the purpose of initial transport modelling being undertaken as part of the wider assessment of the Weston Otmoor proposals, Parkridge have provided some high-level assumptions about the likely characteristics of the population. In the absence of detailed analysis, Parkridge based the age profile on the current profile of Bicester. Parkridge identified Bicester as an appropriate example at this stage of analysis since it was thought to share similar characteristics such as size in terms of number of households and population.
- 2.4.3 Bicester has undergone a significant amount of recent expansion and therefore has a young age profile. As a new settlement, Weston Otmoor would be likely to share a similarly young age profile.
- 2.4.4 It is considered that these are unreasonable assumptions in terms of target size and Parkridge acknowledges that they may evolve. In reality there is also a margin of error in the translation of households to population, and local authority stakeholders consulted in this study have not unreasonably suggested that a population of 40,000 is more likely on the basis of 15,000 new households. From experience the history of estimating such profiles so far in advance suggests that it is very difficult to estimate the actual outturn with any particular accuracy. This issue is not specific to this proposal. Characteristically it is the early residents and market context that often determine the actual profile of new towns. There is some evidence that occupancy of new developments tends to fall over time because initial new residents are often families whose offspring leave home in later years. Importantly, this means that some demands such as schools may be very front-loaded and that early requirements may exceed those in the long term.

Table 2.2 Population Statistics

Residential Population		
No. of households	15,000	
Total Population	35,000	
Average no. of residents per dwelling	2.33	
Residential Population Age Profile		
	No.	% of Population
People aged 0-4	2,800	8.0%
People aged 5-16	5,145	14.7%
People aged 17-64	23,730	67.8%
People aged 65-74	1,855	5.3%
People over 74	1,470	4.2%

Source: Parkridge Holdings (2008)

2.5 Residential Proposal

- 2.5.1 The proposal states that there would be 10,000 dwellings, with expansion capacity for an additional 5,000 dwellings. The residential offer would include a range of housing types and tenures at different densities. It is further stated that affordable

housing would be provided as part of the scheme, which would include a mix of social rented, shared equity and key worker accommodation, and would range from starter units to family homes, although the proportion of these housing types is not committed at this stage.

- 2.5.2 Communities and Local Government guidance suggests that 30-50% of development at an Eco Town should be affordable. On this basis Parkridge have assumed that at least 30% of the housing offer at Weston Otmoor would be affordable. The final percentage would be determined at a later date and would consider factors such as market conditions and central and local government policy.
- 2.5.3 For the purposes of the transport modelling and viability assessment being undertaken as part of the wider evaluation of the Weston Otmoor proposals, Parkridge have made assumptions as to the likely residential development mix (Table 2.3).

Table 2.3 Proposed Development Mix – No. of Units and % Split

	Flats- No. of Beds			Houses – No. of Beds				Total
	Studio / 1	2	3	2	3	4	5+	
No. of Units								
Open market housing	300	675	75	1,200	5,250	2,400	600	10,500
Intermediate housing – shared ownership	405	1,350	0	0	2,295	0	0	4,050
Intermediate housing – discounted rent	22	75	0	0	128	0	0	225
Social rented housing	23	75	0	0	127	0	0	225
Total	750	2,175	75	1,200	7,800	2,400	600	15,000
% of Units								
Open market housing	2	4.5	0.5	8	35	16	4	70.0
Intermediate housing – shared ownership	2.7	9.0	0.0	0.0	15.3	0.0	0.0	27.0
Intermediate housing – discounted rent	0.1	0.5	0.0	0.0	0.9	0.0	0.0	1.5
Social rented housing	0.2	0.5	0.0	0.0	0.8	0.0	0.0	1.5
Total	5	14.5	0.5	8	52	16	4	100

Source: Parkridge Holdings (2008)

2.6 Employment Proposal

- 2.6.1 The proposals include an assumption of around 375,000 sq.m. of mixed employment space and around 140,000 sq.m. of mixed commercial, leisure and retail space. Mixed employment space would provide accommodation for B-class uses, i.e. offices and business parks (B1), industry (B2) including the tram depot and distribution (B8). While the mixed commercial, leisure and retail space would provide accommodation for ancillary offices (B1), retail/ services (A-class uses) and leisure/ community uses (D-class uses).

Table 2.4 Employment Floorspace Proposed

Employment Floorspace	Sq.ft.	Sq.m.
<i>B1 offices</i>	800,000	74,300
<i>B1 business parks</i>	1,600,000	149,000
<i>B2 industry (including tram depot)</i>	800,000	74,300
<i>B8 distribution</i>	800,000	74,300
B-class uses: total	4,000,000	372 000
Retail/ services total	750,000	69,700
<i>Leisure uses</i>	500,000	46,500
<i>Community uses</i>	250,000	23,200
Leisure and community uses total	750,000	69,700
Total	5,500,000	511,000

Source: Parkridge Holdings (2008)

2.6.2 The Weston Otmoor Final Bid Presentation (August 2008) Non Technical Summary states the there will be 'at least one job provided in the town for each household with jobs spread across a wide range of hi-tech, service and industrial sectors although a bias towards knowledge based employment will be actively encouraged.' Parkridge estimate that up to 12,000 jobs would be generated on the site in employment land (B-class) based jobs and a further 3,000 jobs will be service related, including retailing, education, community care and other services. Thus a total of 15,000 jobs are expected to be provided on site, of which 500 would be directly related to the operation and maintenance of the tram network and stock.

2.6.3 In reality such assumptions are necessarily speculative and are considered in more detail in Chapter 6.

Table 2.5 Employment Created at Weston Otmoor

	Employment Floorspace (Sq.ft.)	Employment Density, (Sq.ft per employee)	Jobs (no.)
<i>B1 offices</i>	800,000	250	3,200
<i>B1 business parks</i>	1,600,000	250	6,400
<i>B2 industry (including tram depot)</i>	800,000	500	1,600
<i>B8 distribution</i>	800,000	1,000	800
B-class uses: total	4,000,000	-	12,000
A-class uses total	750,000	-	3,000
D-class uses total	750,000	-	
Total	5,500,000	-	15,000

Source: Parkridge Holdings (2008)

2.6.4 For the purposes of transport modelling, Parkridge have developed broad assumptions about economic activity rates for the residential population of Weston Otmoor (Table 2.6). Around 75% of the population is expected to be economically

active. The current proposal assumes a relatively low proportion of students aged 16+, as there are no higher education functions located within Weston Otmoor. If this element was to be included in the proposal, the proportion would change significantly.

Table 2.6 Economic Activity of Residential Population

Residential Population	No.	% of Population
Potentially economically active i.e. working age population (16-74)	25,585	73.1%
<i>Actually in employment</i>	18,130	51.8%
<i>Self-employed</i>	1,540	4.4%
All types of employment	19,670	56.2%
Students (aged 16+)	525	1.5%
Economically inactive (excl. students) i.e. unemployed, long term sick or disabled, those looking after family/ home	5,390	15.4%
Below or above working age (people aged 0-16 and over 74)	7,945	26.9%

Source: Parkridge Holdings (2008)

2.6.5 For the purposes of the transport assessment, Parkridge assumed that of the 15,000 jobs on site, around 80% - 90% would be taken by residents of the Eco Town. This is based on the assumptions that:

- 60-70% of residents would work within the town itself;
- Up to 10% would commute to London; and
- The remaining 20% would work either within Oxford City Centre, the universities or along the M40 corridor.

2.6.6 Thus around 5,900 – 7,900 residents would commute out of Weston Otmoor for employment, and by inference, around 1,200 to 3,200 people would commute into the Eco Town for employment.

Table 2.7 Residential Commuting Flows

Employed Residents	Employed Residential Population			
	Lower Out Commuting		Higher Out Commuting	
	%	No	%	No
Working in Weston Otmoor	70%	13,769	60%	11,802
Working in London	10%	1,967	40%	7,868
Working in Oxford City Centre, universities or along M40 corridor	20%	3,934		
Total employed residential population	100%	19,670	100%	19,670

Source: Parkridge Holdings (2008)

2.6.7 Although it is not entirely clear – and the subject of a separate study – the most realistic assumption is that these figures are probably expressed in net terms and

that gross commuting figures may be considerably higher. This is to say that the actual flows may be higher because the site would form part of a polycentric network of centres including Bicester, Kidlington, Oxford and further afield, as well as London. It is thus likely that some residents will work elsewhere, and that employment may not be phased with housing. The actual experience will also depend on employment opportunities in centres, such as London and Oxford.

2.7 Community Proposal

2.7.1 The current masterplan includes:

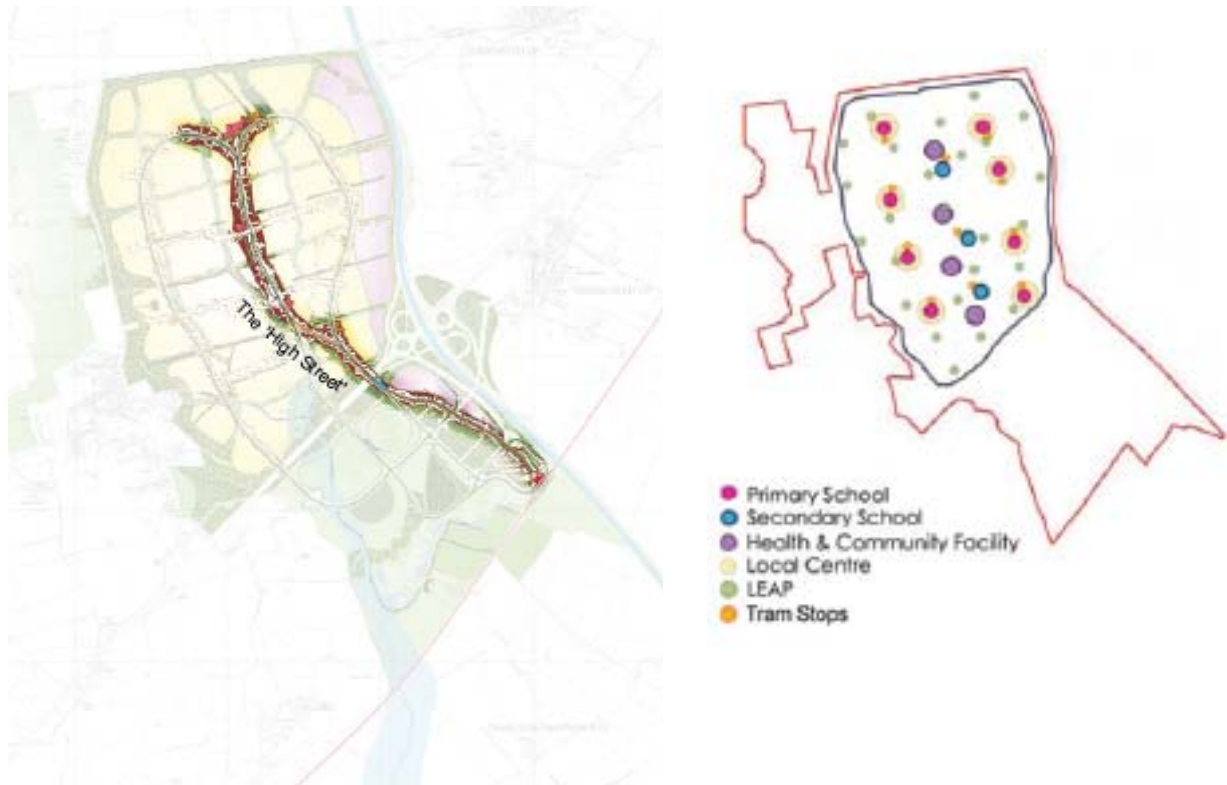
- Up to a quarter of the site would be for green infrastructure including woodlands, open space, allotments and wetland habitat.
- Retail space; leisure facilities (including a sport village); two or three secondary schools (providing in total 2,350 places) and up to eight primary schools (providing in total 3,300 places); healthcare provision and other community facilities.
- Medical and health centres and other community buildings, such as libraries and village halls.

2.7.2 Parkridge have assumed that the provision of services and facilities within Weston Otmoor would meet day to day needs only and that residents would have to travel to higher order settlements for a wider offer. Parkridge have advised that the community and leisure facilities described in the masterplan are intended to be indicative of the likely scale and nature; and they have assumed that this offer would be further refined in consultation with stakeholders, service providers and the community if the proposal proceeds to the next stage. For example, one suggestion in their Non Technical Summary (August 2008) is that the size of any one retail unit is limited to avoid competition with Bicester.

2.7.3 The proposals state the intention is to focus most commercial and retail activity along the central spine (or High Street), although small shops and facilities will be located around schools to provide hubs and focus areas. The Sustainability Action Plan (September 2008) sets out the following guidelines for the location of key facilities:

- Eight primary schools at 600m walking distance;
- Three secondary schools at 1,000m walking distance;
- Health and community facilities at 1,000m walking distance;
- Local hubs around primary schools at 600m walking distance;
- Bus stops/ tram stops at 400m walking distance;
- Local equipped areas of play at 200m centres; and
- Local parks (approximately 2 ha) at 400m walking distance and one centre district park (20ha).

Figure 2.3 Indicative Locations of Community Infrastructure



Source: Parkridge Holdings (2008)

2.8 Transport Proposal

2.8.1 Parkridge considers the transport offer to be one of the masterplan's key strengths. The focus on public transport was based on the principle that this is the key variable in terms of controlling the environmental impact of the development, since in terms of built development all Eco Towns will be equal in that they will all need to meet the same eco credentials.

2.8.2 This ambitious transport proposal currently includes six key elements:

- An 'on site' tram service linked to the new railway station, with average walking distances to tram stops no more than 200m and service frequency to the station of 1 ½ minutes. The tram service would be free for all users within Weston Otmoor.
- A network of cycle and pedestrian routes throughout the site.
- A new railway station and rail line to form part of the East-West rail link between Oxford and Milton Keynes. Direct train and tram-train services to Oxford, Bicester, Milton Keynes and London at 6 minute, 7.5 minute, 15 minute and 30 minute frequencies respectively are proposed, with free train travel between Oxford and Bicester for Weston Otmoor residents. The proposals would also provide the chord line in Bicester, which would allow direct and faster connection with London.
- A new railway station and public transport interchange at the existing Pear Tree Park and Ride site to the north of Oxford. The interchange would be served by a new five-minute-frequency bus service covering three new routes in and around north Oxford. Services to the City Centre from Oxford railway station would also be upgraded to provide a five minute frequency into the City Centre.
- A strategy to discourage the use of private cars through a combination of highway design; road pricing; the introduction of alternatives, such as car

pools and car club schemes; and promotion of the public transport system, including real time information for trams and trains in dwellings, community buildings and workplaces. Road tolls will apply at peak times only.

- Improvements to Junction 9 on the M40. This intention is that this would allow, for example, direct access to the proposed rail based Park and Ride facility. The Park and Ride facility is considered key to achieve the aiming of removing cars from the road and allowing access to Oxford. New high-frequency bus services to Banbury, Leamington Spa, Didcot, Wantage, Grove and Abingdon are also proposed to serve the facility.

2.9 Delivery Timescale

2.9.1 A ten year phasing schedule has been adopted for the delivery of Weston Otmoor (Tables 2.8 and Table 2.9) for assessment purposes. This timescale was included in the Final Presentation by Parkridge and used for the transport and viability assessments being undertaken as part of the wider assessment of the Weston Otmoor proposals.

Table 2.8 Weston Otmoor Phasing Proposals Assumed by Parkridge for Assessment and Final Presentation

	2010	2012	2014	2017	2020
Dwelling units (no.)	1,500	4,500	7,500	12,000	15,000
Employment (sq.ft.) (B Class Uses)	250,000	750,000	1,500,000	3,000,000	4,000,000
On-site jobs (All uses) (no.)	1,050	3,150	6,000	11,400	15,000
School provision - primary (no.)	1	2	4	6	8
School provision – secondary (no.)	1	1	1	2	2

Source: Parkridge Holdings (2008)

Table 2.9 Weston Otmoor Residential Phasing Proposals Assumed by Parkridge for Assessment and Final Presentation

Housing Tenure (No. of Units)	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Total
Market	1,049	1,051	1,049	1,051	1,049	1,051	1,049	1,051	1,049	1,051	10,500
Shared ownership	404	406	404	406	404	406	404	406	404	406	4,050
Discounted	21	23	22	24	22	22	22	24	22	23	225
Social rented	22	23	22	23	22	23	23	22	22	23	225
Total	1,496	1,503	1,497	1,504	1,497	1,502	1,498	1,503	1,497	1,503	15,000

Note: Year 1 is assumed to be 2010

Source: Parkridge Holdings (2008)

- 2.9.2 Although used for assessment, a ten-year delivery timescale is considered unrealistic, as it is far in excess of delivery rates for most schemes. This timescale has seemingly been dictated by the viability assessment all Eco Town proposals nationwide, which required all promoters to consider the delivery over a ten-year period. This implies a housing delivery rate of 1,500 dwellings per annum.
- 2.9.3 In reality, even Parkridge has advised us that it expects delivery rates to be in the region of 500-1,000 dwellings per annum, which implies a 15-20 year build-out period. Table 2.10 shows the anticipated delivery timescale suggested by Parkridge if unconstrained by the assessment timescales. In reality, delivery will depend upon market conditions prevailing at the time, and some contingency is required. The consequential effects on viability, particularly on the ambitious transport proposals, are an important consideration, but are outside the scope of the brief.

Table 2.10 Weston Otmoor Residential Phasing Proposals

Type of Development	Start Date	Annual Delivery	Delivery Period
Residential	2011	750 dwellings	20 years
Science and business park	2011	18,750 sq.m.	20 years
Town centre offices	2011	1,161 sq.m.	20 years
Town centre shops		2,029 sq.m.	20 years
Other development including supermarket and hotel	On a phased basis but not annual.		

Source: Parkridge Holdings (2008)

2.10 Conclusions

- 2.10.1 This section has presented the developers proposals for the Weston Otmoor Eco Town, a proposal that may eventually accommodate 30,000 -35,000 population. A number of overall observations can be made:
- The proposal may evolve if it progresses to more detailed design;
 - The assumptions on socio-economic profiles, employment, and transport are crude at this stage; for example, population levels may be higher.
 - The issue of delivery and viability are critical ones that are subject to market conditions. Detailed assessment is outside the scope of this work, but deliverability should be tested thoroughly to ensure that risks and sensitivities are fully understood.

3 Regional and County Context

3.1 Introduction

3.1.1 This section summarises the background growth context of the south east region and for Oxfordshire. It is intended to provide broad scene setting, but it is within this context that the future development of existing settlements and the proposed Eco Town needs to be considered.

3.2 Growth Forecasts

3.2.1 Significant forecast levels of demographic and economic growth are expected in the South East. The Secretary of State's proposed changes to the South East Plan reflect this and in particular planned delivery of new housing in the region:

'The South East is a high demand housing area that has to manage the needs arising from and implications of considerable levels of demographic and economic growth whilst respecting environmental constraints. The previous (2004-revised) official projections indicated a population growth of 44,200 and a household growth of about 35,900 per year. The latest sub-national population projections (2006-based) that indicate an annual population growth of about 64,300 indicate that the recent demographic trends may lead to substantially higher household numbers in the South East than previously understood. Historically, the supply of housing in the South East has not matched the demographic-based need / demand. However, since 2003 the level of supply has begun to increase reaching nearly 34,600 in 2006/07. These recent increases in supply of housing still fall short of the demand and the affordability of housing across the region has been worsening over the years.'

3.2.2 The Secretary of State's proposed changes also suggest an increase in the minimum annual average net additional dwelling requirement in Cherwell District from 590 to 670 (and total in period from 11,000 to 13,400). The reasoning for this recommendation is reproduced below:

The Secretary of State agrees with the Panel that some additional housing uplift should be provided for in Cherwell district, but considers that a higher rate is both desirable and achievable. This is because:

- Household projections for Cherwell district amount to 900 households per year, compared to a planned housing delivery rate of 640 dwellings per year.
- There is a large amount of housing within the existing planning pipeline. Projected housing completions for the District of Cherwell show an approximately 980 additional dwellings above Panel rates have shown to be available, suitable and achievable up to the year 2011.
- There is a significant amount of unconstrained land in Cherwell.
- Banbury and Bicester serve as important market towns for the wider area, and increased rates of housing provision may make it more attractive to new economic activity as increased populations support new markets.
- Banbury and Bicester are served by the rail network and are close to major roads, and contain major centres of employment.

3.2.3 Table 3.1 shows population forecasts for Oxfordshire using 2004-based sub-national population projections from the Office for National Statistics (the ones used in the South East Plan). The data show what will happen if recent trends in births,

deaths and migration continue. They do not take account of policy or planned housing developments.

- 3.2.4 An estimated 619,700 people were living in Oxfordshire in 2004, 133,500 in Cherwell. The population of Oxfordshire is expected to grow to 663,000 by 2015 and 702,300 by 2026 (increases of 7.0% and 13.3% respectively). Within the County, forecast growth to 2026 is expected to be highest in Oxford (21.4%), Cherwell (17.9%) and West Oxfordshire (10.3%). This growth is driven by births outnumbering deaths and in-migration.
- 3.2.5 The projections for Oxfordshire also indicate that there will be a greater proportion of older people in the population, rising from just under 15% in 2004 to almost 20% by 2026. The greatest increase will be in the proportion of people aged over 85 (who are the biggest users of health and social care). The proportion of people over 85 is set to increase by 118% in Cherwell, by 102% in Oxfordshire overall between 2004 and 2026. The proportion of the population aged 15-64 is expected to decrease (from 67.3% in 2004 to 63.8% in 2026).

Table 3.1 ONS Population Forecasts, Oxfordshire

	All persons (000s)					
	2004	2006 mid-year estimate	2015	2026	2004- 2015 % change	2004- 2026 % change
Oxfordshire	619.7	632.0	663.0	702.3	7.0%	13.3%
Cherwell	133.5	137.4	145.9	157.4	9.3%	17.9%
Oxford	145.1	149.1	164.2	176.1	13.2%	21.4%
South Oxfordshire	127.9	128.1	130.9	135.8	2.3%	6.2%
Vale of White Horse	116.2	117.1	120.4	126.0	3.6%	8.4%
West Oxfordshire	97.0	100.2	101.6	107.0	4.7%	10.3%

Source: ONS 2004-based population projections and 2006 mid-year population estimates.

- 3.2.6 Projected changes in households can be examined through use of 2004 based sub-national household projections published by CLG (Table 3.2). Again, these are the same set of data utilised in the South East Plan. These forecasts show significant growth in the number of households in Oxfordshire (an increase of 25.3% in the period 2004 to 2026). This compares with a national projection of 23.3%.
- 3.2.7 Within Oxfordshire, Cherwell is expected to experience the largest growth in number of households – rising by 35.7% in 2004 to 2026. Oxfordshire follows with an estimated increase of 31.5% in the same period.

Table 3.2 ONS Household Forecasts, Oxfordshire

	Households (000s)			2004-2016	2004-2026
	2004	2016	2026	% change	% change
Oxfordshire	249	285	312	14.5%	25.3%
Cherwell	56	67	76	19.6%	35.7%
Oxford	54	64	71	18.5%	31.5%
South Oxfordshire	52	57	61	9.6%	17.3%
Vale of White Horse	47	51	56	8.5%	19.1%
West Oxfordshire	40	45	50	12.5%	25.0%

Source: CLG.2004-base household projections.

3.2.8 Forecasts for population and households have also been produced by Oxfordshire County Council. These provide estimates of population and household growth by district, town and ward to 2016 based on planned changes in housing stock. The estimates are 2001-based and were published in August 2007. The modelling for these forecasts has been carried out by the demography team at the Greater London Authority using their small area model¹. The main inputs are ONS population data and actual and planned housing development by ward provided by the Oxfordshire District Councils.

3.2.9 Table 3.3 shows forecast population change by district in 2001-2016. Although the base year of these forecasts is different to the ONS forecasts presented, these estimates show a slightly lower level of anticipated population in Oxfordshire in 2016. This is also true at the District level, with the exception of Vale of White Horse and West Oxfordshire. The increase in population is predominantly in the older age groups.

Table 3.3 'Small Area Model' Population Forecasts by District, 2001-2016

	All persons (000s)				
	2001	2006	2011	2016	2001-2016 % change
Oxfordshire	607.3	620.4	643.9	654.8	7.8%
Cherwell	132.0	132.3	137.8	138.4	4.9%
Oxford	135.5	141.3	147.6	149.2	10.1%
South Oxfordshire	128.3	127.8	130.3	134.1	4.5%
Vale of White Horse	115.8	118.4	123.0	127.1	9.8%
West Oxfordshire	95.7	100.7	105.1	106.0	10.8%

Source: Oxfordshire County Council 2001-based population projections (August 2007).

¹ Full details of the modelling methodology are available from Oxfordshire Data Observatory.

- 3.2.10 In the Oxfordshire County Council projections, the number of households in Oxfordshire is expected to grow at a faster rate than the population, with an increase of over 38,000 households, or 15.8%, from 2001 to 2016. The net result is a decrease in average household size from 2.41 persons in 2001 to 2.24 in 2016, which is in line with national trends. The number of single person households in Oxfordshire is projected to grow by almost 27% over the same period.
- 3.2.11 The general conclusion that can be drawn from such forecasts is that significant growth population and households is anticipated in Oxfordshire. Based on the revisions to the South East Plan, it is also a strong possibility that the proposed minimum allocations in the South East Plan do not meet household demand in full.

3.3 Housing Completions and Affordability

- 3.3.1 Based on Government published data, completions in Oxfordshire in the boom years between 1999 and 2007 have totalled 16,477, an average of 2,060 per annum (Table 3.4). Nevertheless, figures collated by Oxfordshire County Council and submitted to SEERA on net additional dwellings suggest a different pattern of completions, as shown in Table 3.5 below. Over the 8 years 1999 to 2007, the overall totals are higher than those published by CLG, suggesting a higher average of 2,400 per annum for the county. The figures are also significantly higher for the second 4 years, averaging just over 3,000 for the County and 700 in Cherwell. In general the consultant team judges the 8 year data to be more representative, suggesting a delivery capability on existing trends of up to 2,400 per year, because this represents more of a single housing cycle.
- 3.3.2 Recent completion rates compares with the initial assumption of 750 – 1,500 houses in the proposed Eco Town alone. The Government’s Proposed Changes to the South East Plan sets an annual target of 2,760 dwellings for Oxfordshire (2,034 in Central Oxfordshire and 726 in the rest of Oxfordshire). Based on the 8 year averages, housing completions will need to increase to meet the proposed targets. Cherwell District has experienced average completions of 520-600 dwellings per annum over the past 8 years, compared with a proposed target of 670. The supply of affordable housing completions will need to increase significantly to reach the target of 40% proposed by the Panel. In 2006/7 affordable housing completions were 14% of total completions in Cherwell and 11% of total completions in Oxfordshire.

Table 3.4 Housing Completions – CLG Source

	No. of Dwellings					
	Oxfordshire			Cherwell		
	Market	Social Rented	Total	Market	Social Rented	Total
1999/2000	2,091	253	2,344	712	30	742
2000/2001	1,805	357	2,162	509	80	589
2001/2002	1,591	351	1,942	406	17	423
2002/2003	1,613	145	1,758	373	26	399
2003/2004	1,484	327	1,811	391	16	407
2004/2005	1,736	154	1,890	393	23	416
2005/2006	2,123	450	2,573	569	51	620
2006/2007	1,775	222	1,997	487	80	567

Note: Based on returns from Local Authorities and NHBC

Source: CLG (2008) Live Table 253 Housebuilding: Permanent Dwellings Started and Completed, by Tenure and District, 2006/07

Table 3.5 Housing Completions (Net Additional Dwellings) – Oxfordshire CC/SEERA Source

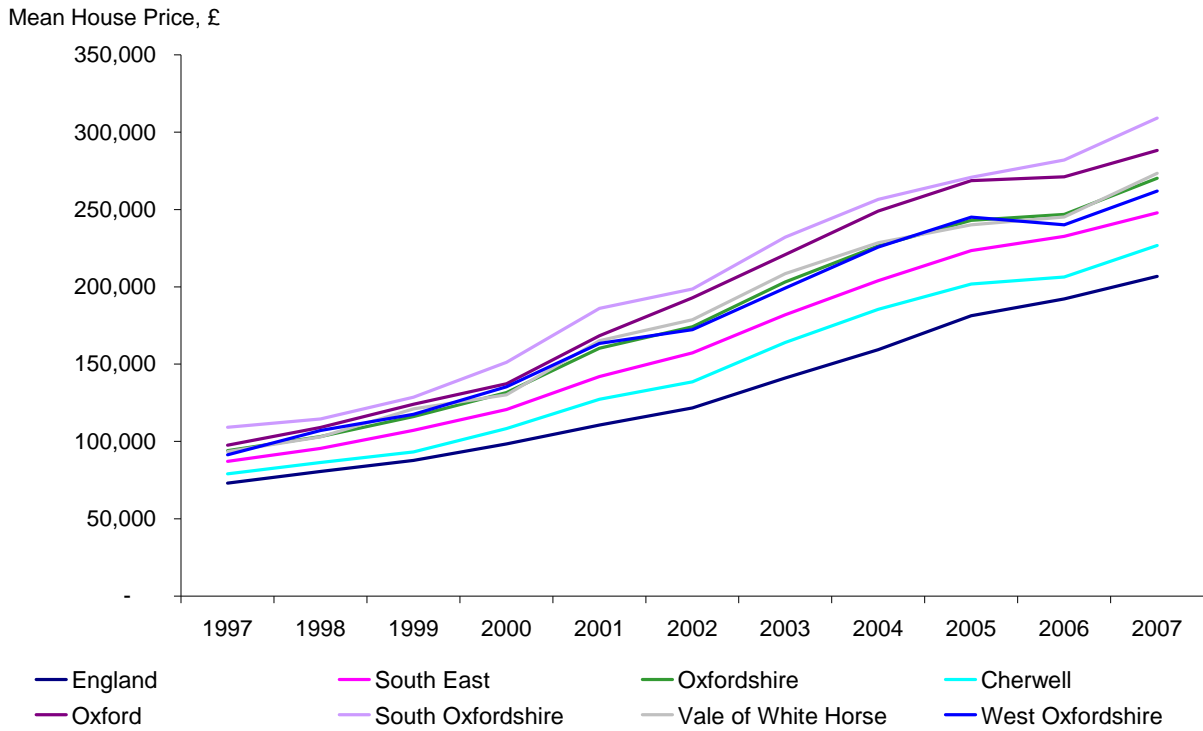
	No. of Dwellings	
	Oxfordshire	Cherwell
1999/2000	1,917	624
2000/2001	1,829	528
2001/2002	1,830	533
2002/2003	1,603	436
2003/2004	2,015	409
2004/2005	2,846	678
2005/2006	3,535	1068
2006/2007	3,213	851
2007/2008	2,813	455

Note. No break down is available for market or social housing from this source

Source: Oxfordshire/ SEERA (2008)

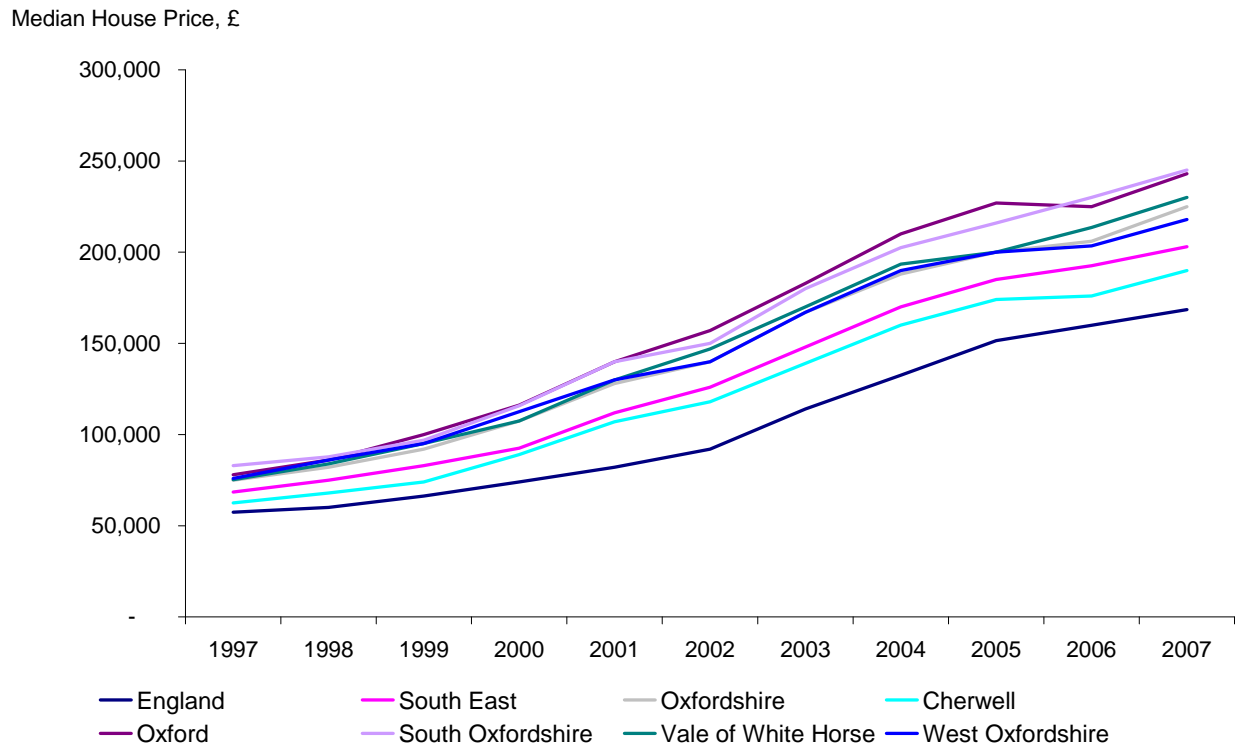
- 3.3.3 The Oxfordshire Housing Market Assessment: Final Report highlights that sales turnover has been declining since 2001 and that authorities in Oxfordshire have been experiencing a sharper decline than nationally. The profile has been slightly different in Cherwell, where sales turnover has been higher than the national average. Low sales turnover combined with high demand has had an inflationary impact on prices and limits housing options.
- 3.3.4 Housing affordability is identified in the Regional Economic Strategy (2006) as a key constraint to the continued growth of the South East region. The RES reports that *'average house prices in the region have risen by 70% since 1999 while average annual earnings have risen by 30%, and first time buyers accounted for just 18% of house purchases in 2003, compared with 48% in 1993'*.
- 3.3.5 Figures 3.1 and 3.2 show mean and median house prices between 1997 and 2007. House price increases in Oxfordshire have been higher than in the South East and England. South Oxfordshire experienced the greatest increase in Oxfordshire.
- 3.3.6 Cherwell has the lowest mean and median house prices of all the districts in Oxfordshire. Mean and median prices are also lower in Cherwell than in the South East, though both mean and median prices in Cherwell are higher than for England as a whole. This suggests that the supply of housing in Cherwell has been better matched to demand than in other parts of Oxfordshire, and, to some extent, the South East.
- 3.3.7 The lowest quartile house prices in Cherwell District have experienced a higher percentage increase than the mean and median, indicating that high demand and constricted supply have had a more pronounced inflationary affect on house prices at the lower end of the market.

Figure 3.1 Mean House Prices



Source: Communities and Local Government (2008) Live Tables

Figure 3.2 Median House Prices



Source: Communities and Local Government (2008) Live Tables

3.4 Employment Forecasts

3.4.1 Analysis of Annual Business Inquiry (ABI) data provides a broad overview of past trends in employment and workplaces. It is workplace- rather than residence-based data.

3.4.2 Table 3.6 shows changes in employment in Oxfordshire over the period 2000 to 2006. In 2006, there were 314,334 employees in Oxfordshire, of which 64,753 (20.6%) were in Cherwell. The overall context was one of growth, but over the period 2000 to 2006, employment in Cherwell contracted by some 4.3%. Employment also contracted in all of the other Oxfordshire Districts with the exception of Oxford which observed significant growth of 12.4%. The contraction in Cherwell was the second largest, coming second only to South Oxfordshire (at -7.1%). Employment growth in Oxfordshire as a whole over the period was around 1.0%. Over the period, Cherwell's share of total employment in Oxfordshire fell from 21.7% in 2000 to 20.6% in 2006. For the reasons given below the table, these figures need to be treated with some caution and as broad indicators, but they do not suggest that Cherwell itself has been a strong area of overall economic growth or that housing provision has been matched by local employment growth.

Table 3.6 Employee Change, 2000-2006

Area	No. of Employees			% Change in Employees		
	2000	2003	2006	2000-2003	2003-2006	2000-2006
Cherwell	67,646	63,263	64,753	-6.5%	2.4%	-4.3%
Oxford	94,434	96,692	106,181	2.4%	9.8%	12.4%
South Oxfordshire	55,706	53,039	51,737	-4.8%	-2.5%	-7.1%
Vale of White Horse	55,958	60,458	54,571	8.0%	-9.7%	-2.5%
West Oxfordshire	37,360	34,464	37,091	-7.8%	7.6%	-0.7%
Oxfordshire	311,105	307,916	314,334	-1.0%	2.1%	1.0%
South East	3,637,128	3,602,534	3,642,021	-1.0%	1.1%	0.1%
England & Wales	22,830,996	23,269,366	23,812,586	1.9%	2.3%	4.3%

Note: ABI data is derived from surveys of employers and, as such, relates to where people work rather than where they live. There have been cases where major employers have been left out, misallocated or double-counted. Therefore, the data must be treated with some caution, particularly at district and sub-district level, where significant variations can arise from one year to the next.

Source: 2006 ABI.

3.5 Sectoral Employment Growth

- 3.5.1 Projections for employment growth by sector for the South East have been produced by Experian. These forecasts are explored at a district and county level below. However, it is recognised that there are limitations to these forecasts – especially when examining them below regional level. The forecasts are based on existing relationships and past trends.
- 3.5.2 The sectors forecast to experience the greatest employment growth in the South East region are Hotels and Catering (30.7%).
- 3.5.3 Table 3.7 shows the top five sectors for projected employment growth in Cherwell, Oxfordshire and the South East region. Hotels & Catering, Health and Other 'Other' services are among the top five growth sectors in all three areas. A key difference is that the Other Financial and Business Services sector appears as a top growth sector in the South East and Oxfordshire but not in Cherwell. In Cherwell, the sector is expected to grow less - by 21.6%.

Table 3.7 Top Five Sectors – Projected Employment Growth, 2008-2026

	% Change 2008-2026
Cherwell	
Other 'Other' services	32.8%
Hotels & Catering	31.1%
Metals	27.7%
Health	26.4%
Education	22.1%
Oxfordshire	
Other Financial and Business Services	40.1%
Hotels and Catering	33.0%
Other 'Other' services	27.6%
Health	20.9%
Other 'Other' Manufacturing	19.8%
South East	
Hotels & Catering	30.7%
Other Financial and Business Services	26.9%
Business Services	26.1%
Other 'Other' services	22.4%
Health	19.6%

Source: Experian projections (Spring 2008).

3.6 High-tech and Knowledge-Based Sectors in Oxfordshire

- 3.6.1 The 'Enterprising Oxford' report published by the Oxfordshire Economic Observatory in 2007² highlights the strength of the Oxfordshire economy in terms of its range and the vitality of high-tech activities.
- 3.6.2 This provides an analysis of trends in high-tech businesses using ABI data for 1998-2004. The report finds that the number of high-tech businesses grew rapidly over the 2000-2001 period and has then consolidated over more recent years. Over the period 1998-2004 as a whole, the number of businesses in high-tech sectors manufacturing and service sectors increased by around 9% and 16% respectively. However, as stated, much of this growth took place to 2001, with the number of high-tech businesses in Oxfordshire being relatively static since then.
- 3.6.3 There has been little change in employment in high-tech manufacturing and services in Oxfordshire in recent years. However, there are variations between sectors, with the largest increases being observed in pharmaceuticals and computer-related businesses. Motor manufacture experienced a decline in employment of approximately 1,000 jobs. Overall, this data provides very little evidence that high-tech sectors have been an important direct source of employment growth in Oxfordshire in recent years.
- 3.6.4 In contrast, growth has been more significant and consistent in other (non high-tech) knowledge-based sectors. In particular, these include financial, legal and business management activities. The number of businesses in these activities has achieved sustained growth, rising by approximately 55% between 1998 and 2004. This growth is mainly accounted for by growth in business and management consultancy, although there has also been growth in media-related sectors, legal services, accounting/auditing and market research activities. Employment in these sectors has experienced moderate growth in 1998-2004 but employment losses in the financial services and advertising sectors have partly offset overall job gains.
- 3.6.5 Overall, high-tech activities make a very important contribution to overall employment in Oxfordshire – 2004 estimates by Oxfordshire Economic Observatory indicating these activities account for 12% of businesses and 14% of employment in Oxfordshire. Trends suggest a period of consolidation following a period of rapid growth in 2000-2001. However, it is significant to note the growth of (non high-tech) knowledge-based services which provide vital support to the high-tech sector.
- 3.6.6 Tables 3.8 and 3.9 provide a summary of growth in business numbers and employment in high-tech and (non high-tech) knowledge-based sectors in Oxfordshire in 1998-2004.
- 3.6.7 The Science Vale UK (previously Quadrant) Partnership³ is seeking to further develop the Science Vale UK area in Southern Central Oxfordshire. The Science Vale UK comprises parts of South Oxfordshire District and the Vale of White Horse District. The most distinctive aspects of the Science Vale UK are its scientific research facilities, the growing strength of high-tech manufacturing, the scale of planned housing growth, the quality of existing and planned specialist business space and its strategic location. The potential economic value of the Science Vale UK's science base has been recognised by SEEDA, which has identified the Harwell Science and Innovation Campus as the pilot for its RES Transformational Action relating to Science and Innovation Campuses.
- 3.6.8 A report⁴ commissioned to explore the future economic and employment growth potential of the Science Vale UK has concluded that the area will be very important to the delivery of both the regional spatial and economic strategies. The report concludes:

² 'Enterprising Oxford: The Oxfordshire Model'. Oxfordshire Economic Observatory (2007).

³ A consortium of organisations including Vale of White Horse DC, South Oxfordshire DC, Oxfordshire CC, SEEDA, UKAEA, Science and Technologies Facilities Council, MEPC, OEP and GOSE.

⁴ 'Evaluation of the economic and employment growth potential of the southern central Oxfordshire Quadrant', Oxfordshire Economic Observatory/Oxford Innovation/SQW (November 2007).

'Its combination of substantial planned growth combined with its economic strengths and potential make it one of the most important pieces of the strategic planning 'jigsaw' for the South East region. It is no exaggeration to say that the Quadrant will have a significant effect on the region's economic performance, and hence on the overall economic performance of the country.'

- 3.6.9 Two of the key identified strategic themes to be pursued in the future are (i) the Science Vale UK as a high-tech growth region and (ii) high tech employment and businesses. Clearly, there is identified potential for this area to become more significant in the future and fulfil a greater role within the Oxford to Cambridge Arc.

Table 3.8 Business Growth in High-Tech and Knowledge-Based Sectors, Oxfordshire

Sector (by SIC code)	Number of Businesses		% Change
	1998	2004	1998-2004
22.1 Publishing	263	285	8.4%
22.3 Reproduction of recorded media	10	14	40.0%
24.4 Manufacture of pharmaceuticals & pharmaceutical products	9	18	100.0%
24 (not 24.4) Other chemicals manufacture	43	50	16.3%
30.0 Manufacture of office equipment & computers	34	31	-8.8%
32 Manufacture of electronic equipment	35	33	-5.7%
33 Manufacture of medical, precision & scientific instruments	110	134	21.8%
34 Manufacture of motor vehicles, parts & accessories	52	45	-13.5%
35.3 Aerospace	13	8	-38.5%
Total (high-tech manufacturing)	569	618	8.6%
64.2 Telecommunications	56	70	25.0%
72.1 Computer hardware consultancy	59	98	66.1%
72.2 Software consultancy & supply (including software publishing)	1,157	1,212	4.8%
72.3 & 72.4 Data processing & database activities	37	86	132.4%
72.6 Other computer related activities	276	459	66.3%
73 Research & development	148	152	2.7%
74.2 Architecture, engineering & related technical consultancy	745	806	8.2%
74.3 Technical testing & analysis	21	41	95.2%
Total (high-tech services)	2,499	2,924	17.0%
65, 66 & 67 Financial services & supporting activities	445	471	5.8%
74.11 Legal activities	182	227	24.7%
74.12 Accounting, auditing & tax consultancy	287	392	36.6%
74.13 Market research & public opinion polling	22	82	272.7%
74.14 Business & management consultancy	1,039	1,938	86.5%
74.4 Advertising	161	161	0.0%
92.1/2/4 Motion picture & video activities, radio & TV, news agency activities	78	176	125.6%
Total (Other knowledge-based services)	2,214	3,447	55.7%

Source: Arup using ABI in 'Enterprising Oxford' (2007).

Table 3.9 Employment Growth in High-Tech and Knowledge-Based Sectors, Oxfordshire

Sector (by SIC code)	Number of Jobs		% Change
	1998	2004	1998-2004
22.1 Publishing	4,500	5,100	13.3%
22.3 Reproduction of recorded media	*	*	*
24 Chemicals manufacture (including pharmaceuticals)	1,900	2,800	47.4%
30.0 Manufacture of office equipment & computers	1,600	1,300	-18.8%
32 Manufacture of electronic equipment	400	400	0.0%
33 Manufacture of medical, precision & scientific instruments	2,500	2,600	4.0%
34 Manufacture of motor vehicles, parts & accessories	5,900	4,800	-18.6%
35.3 Aerospace	*	*	*
Total (high-tech manufacturing)	17,100	17,400	1.8%
64.2 Telecommunications	1,300	1,700	30.8%
72.2 Software consultancy & supply (including software publishing)	4,600	4,700	2.2%
72.1/3/4/6 Other computer related activities	1,400	2,000	42.9%
73 Research & development	14,700	6,100	-58.5%
74.2 Architecture, engineering & related technical consultancy	4,400	4,600	4.5%
74.3 Technical testing & analysis	200	200	0.0%
Total (high-tech services)	26,600	19,300	-27.4%
80.3 Education	9,400	18,100	92.6%
Total (high-tech services + education)	36,000	37,400	3.9%
65, 66 & 67 Financial services & supporting activities	6,000	5,200	-13.3%
74.11 Legal activities	1,900	2,200	15.8%
74.12 Accounting, auditing & tax consultancy	2,300	2,200	-4.3%
74.13 Market research & public opinion polling	600	2,500	316.7%
74.14 Business & management consultancy	3,200	5,800	81.3%
74.4 Advertising	5,800	4,400	-24.1%
92.1/2/4 Motion picture & video activities, radio & TV, news agency activities	400	500	25.0%
Total (Other knowledge-based services)	20,100	24,300	20.9%

Note: It should be noted that a substantial number of R&D employees (identified in SIC73) were reclassified to the higher education sector in later ABI data.

Source: Arup using ABI in 'Enterprising Oxford' (2007).

3.7 Conclusions

- 3.7.1 This section has reviewed some of the broad contextual economic and demographic trends in Oxfordshire. A number of points are worth noting:
- The area is forecast to grow significantly in terms of population and households. Household growth is likely to be in excess of the minimum provision expressed in the South East Plan.
 - Employment growth has been focused on Oxford City in the recent past, with many Oxfordshire districts experiencing a decline in employment over the past few years.
 - High-tech activities make a very important contribution to overall employment in Oxfordshire, but activity is strongly concentrated in South Oxfordshire.
- 3.7.2 Cherwell has the lowest mean and median house prices of all the districts in Oxfordshire. Mean and median prices are also lower in Cherwell than in the South East, though both mean and median prices in Cherwell are higher than for England as a whole. This suggests that the supply of housing in Cherwell has been better matched to demand than in other parts of Oxfordshire and to some extent the South East. It also may be concluded that Cherwell is not necessarily the highest priority location for housing among Oxfordshire districts and may also raise questions about the deliverability of substantial additional housing.

4 Profiles of Bicester and Kidlington

4.1 Introduction

4.1.1 This chapter summarises a range of baseline conditions in Bicester and Kidlington as the two settlements most likely to be directly affected if the Eco-Town goes ahead. The chapter is complemented by Chapter 5 which considers further the development opportunities available to the towns. The chapter concludes with a summary analysis of the two settlements current strengths, weaknesses, opportunities and threats.

4.2 Overview of Bicester and Kidlington

Bicester

4.2.1 Bicester is a market town with a long history going back to Saxon times. It is about 13 miles north-east of Oxford, and London is 57 miles away travelling on the M40 Bicester being 3 miles from junction 9. The town has a long-standing connection with the military. During the First World War an airfield was established north of the town for the Royal Flying Corps. This is now Bicester Airfield. An Army depot is located just outside the town. The depot has its own internal railway system, the Bicester Military Railway. This presence has scaled back over time, with the RAF leaving RAF Bicester in 2004 (although the MOD still owns part of the site, which is used for training). However, there is still some RAF activity in the immediate area, the closest being RAF Weston on the Green at which parachuting training is carried out. This facility forms part of the proposed Eco Town site.

4.2.2 Bicester is served by two railway stations. Bicester North Station is on the Chiltern Lines between London Marylebone and Birmingham Snowhill, and runs via Banbury and Leamington Spa. Bicester Town Station provides a branch line connection to Oxford. There are firm existing plans to upgrade services on both lines.

4.2.3 Within Bicester, the historic shopping streets, particularly Sheep Street and Market Square, have a wide range of local and national shops together with cafés, pubs and restaurants. Sheep Street is now pedestrianised with car parks nearby. Weekly markets take place in the town centre along with Farmers Markets and an occasional French Market. A £70 million re-development of the town centre has been secured. South of Bicester is the retail outlet Bicester Village Shopping Centre. One of the largest Garden Centres in the UK lies further towards Oxford.

4.2.4 Bicester has witnessed significant housing-led growth and an over 50% rise in population since the early 1990s, fuelled particularly by its good accessibility via the extension to the M40 opened in 1991 from Oxford to Birmingham and improvements in the train services, particularly to London Marylebone, and through its status in planning terms as a housing growth location within the Oxford sub region. However, its character has been influenced by its 'garrison town' role; by the incremental nature of growth, which has occurred without adequate investment in social or transport infrastructure; and by the lack of a clear vision or strategy for its development. It is thus not always considered among the most residentially desirable or commercially attractive market towns in Oxfordshire, although it would be ranked highly at a wider scale. The issues of the town are now being addressed through the formation of a strong partnership in the form of Bicester Vision. Bicester Village has done much to put the town on the map. However, the economy of the town, focused on industry and distribution, has yet to catch up with the housing growth, although significant opportunities are emerging in the form of new business space, particularly when/if the M40 junction is upgraded.

Kidlington

4.2.5 Kidlington is a very large village 8 km (5 miles) also with Saxon origins, north of Oxford (although only one mile from edge to edge) and 27 km (17 miles) south of Banbury, between the River Cherwell and the Oxford Canal.

- 4.2.6 The settlement has grown steadily from an ancient village adjacent to the church. In the 1920s and 1930s Kidlington became a victim of ribbon development along the main (now A4260) road through the village. Since 1945 many housing estates have been built behind this on both sides. Kidlington has about 50 shops, banks, and building societies, a library, a large village hall, and a regular weekly market. It is home to the headquarters of the Oxfordshire Fire and Rescue Service, the Thames Valley Police, and the major European publishing company Elsevier has its UK head office there. Oxford Airport has, since 1962, had a pilot training school that has trained thousands of pilots for many airlines in over 40 different countries. There are several industrial and business parks, including the Begbroke Science Park. A railway station was built in 1852 near Langford Lane but closed in 1964, and the nearest station is in the smaller village of Tackley.
- 4.2.7 In recent years, in contrast to Bicester, Kidlington has undergone limited growth in population because of a lack overall of capacity and Greenbelt constraints. Also in contrast, the Kidlington economy has strengthened, reflecting its proximity to Oxford, the airport and a better image than Bicester.

4.3 Population trends

- 4.3.1 According to 2001 Census data there were 28,665 people living in Bicester and 13,714 living in Kidlington in 2001.
- 4.3.2 Table 4.1 shows trends in population in the period 1991 to 2001. This shows that between 1991 and 2001 Bicester's population grew from 19,750 to 28,665, that is, an increase of nearly 9,000 people or a 45% increase on the 1991 population. This is significantly higher than comparator areas, indicating that Bicester has experienced rapid population growth during this period.

Table 4.1 Change in Population 1991-2001

	No. of Persons		% Change
	1991	2001	(1991 – 2001)
England and Wales	50,748,000	52,041,916	3.2%
South East	7,629,200	8,000,645	5.2%
Oxfordshire	576,100	605,486	5.4%
Cherwell	124,100	131,772	6.4%
Bicester	19,750	28,665	45.3%
Kidlington	13,623	13,714	0.59%

Source: Arup 2008 based on Census 2001.

- 4.3.3 Mid-year population estimates for 2006 published by ONS and small area forecasts provided by Oxfordshire County Council show estimated growth that has occurred since 2001 (Table 4.2). This indicates that average annual levels of population growth have increased in more recent years (with the exception of Bicester). The hierarchy between areas remains the same, although there is evidence that growth in Oxfordshire and Cherwell is pulling away from the lower average for the South East region as a whole.

Table 4.2 Change in Population 2001-2006

	No. of Persons		% Change
	2001	2006	(2001 – 2006)
England and Wales	52,041,916	53,728,800	2.6%
South East	8,000,645	8,237,800	2.7%
Oxfordshire	605,486	632,000	4.1%
Cherwell	131,772	137,400	4.1%
Bicester	28,705	29,971	4.4%
Kidlington	13,744	13,247	-3.6%

Source: Arup 2008 based on ONS mid-year population estimates for 2006, Census 2001 and Oxfordshire County Council's 2006-based small area forecasts (latter used for Bicester and Kidlington figures).

4.3.4 Table 4.3 summarises forecast population and household change in 2001 to 2016 by town. This shows that Bicester is expected to experience the greatest growth in both population and households of the three settlements identified in Cherwell – experiencing growth in 2001 to 2016 of 13.8% and 22.7% respectively. In contrast, Kidlington is forecast to experience a contraction in population of 7.3% in the period 2001-2016. This reflects both capacity and Greenbelt policy.

Table 4.3 'Small Area Model' Population and Households Forecasts by Town, 2001- 2016

	2001	2006	2011	2016	2001-2016 % change
All persons (000s)					
Oxfordshire	607.3	620.4	643.9	654.8	7.8%
Cherwell	132.0	132.3	137.8	138.4	4.9%
Banbury	41.9	42.5	43.6	42.9	2.5%
Bicester	28.7	30.0	32.0	32.7	13.8%
Kidlington Village	13.7	13.2	13.0	12.7	-7.3%
Households (000s)					
Oxfordshire	241.5	252.4	269.1	279.7	15.8%
Cherwell	53.4	55.6	60.2	62.6	17.3%
Banbury	17.5	18.5	19.8	20.2	14.9%
Bicester	11.6	12.5	13.7	14.2	22.7%
Kidlington Village	5.5	5.6	5.7	5.8	5.0%

Source: Oxfordshire County Council. 2001-based population and household projections (August 2007).

4.4 Business and Employment Trends

- 4.4.1 When compared to other areas, including England, the South East, Oxfordshire, Cherwell and Kidlington, Bicester had a relatively higher proportion of businesses registered in the health, production, motor trades, wholesale, post and telecommunications and finance sectors in 2007. Bicester had a significantly higher proportion of enterprises registered in the motor trades, health and finance sectors. Kidlington, on the other hand, had a relatively higher proportion of businesses registered in the education, construction, retail and public admin and other services sectors.
- 4.4.2 Analysis of Annual Business Inquiry (ABI) data provides an overview of past trends in employment and workplaces. It is workplace- rather than residence-based data.
- 4.4.3 Table 4.4 shows changes in employment in Oxfordshire over the period 2000 to 2006. In 2006, there were 314,334 employees in Oxfordshire, of which 64,753 (20.6%) were in Cherwell. Over the period 2000 to 2006, employment in Cherwell contracted by some 4.3%. Employment also contracted in all of the other Oxfordshire Districts with the exception of Oxford which observed significant growth of 12.4%. The contraction in Cherwell was the second largest, coming second only to South Oxfordshire (at -7.1%). Employment growth in Oxfordshire as a whole over the period was around 1.0%. Over the period, Cherwell's share of total employment in Oxfordshire fell from 21.7% in 2000 to 20.6% in 2006.

Table 4.4 Employee Change, 2000-2006

Area	No. of Employees			% Change		
	2000	2003	2006	2000-2003	2003-2006	2000-2006
Cherwell	67,646	63,263	64,753	-6.5%	2.4%	-4.3%
Oxford	94,434	96,692	106,181	2.4%	9.8%	12.4%
South Oxfordshire	55,706	53,039	51,737	-4.8%	-2.5%	-7.1%
Vale of White Horse	55,958	60,458	54,571	8.0%	-9.7%	-2.5%
West Oxfordshire	37,360	34,464	37,091	-7.8%	7.6%	-0.7%
Oxfordshire	311,105	307,916	314,334	-1.0%	2.1%	1.0%
South East	3,637,128	3,602,534	3,642,021	-1.0%	1.1%	0.1%
England & Wales	22,830,996	23,269,366	23,812,586	1.9%	2.3%	4.3%

Note: ABI data is derived from surveys of employers and as such relates to where people work rather than where they live. There have been cases where major employers have been left out, misallocated, or double-counted. Therefore, the data must be treated with some caution, particularly at district and sub-district level, where significant variations can arise from one year to the next.

Source: 2006 ABI.

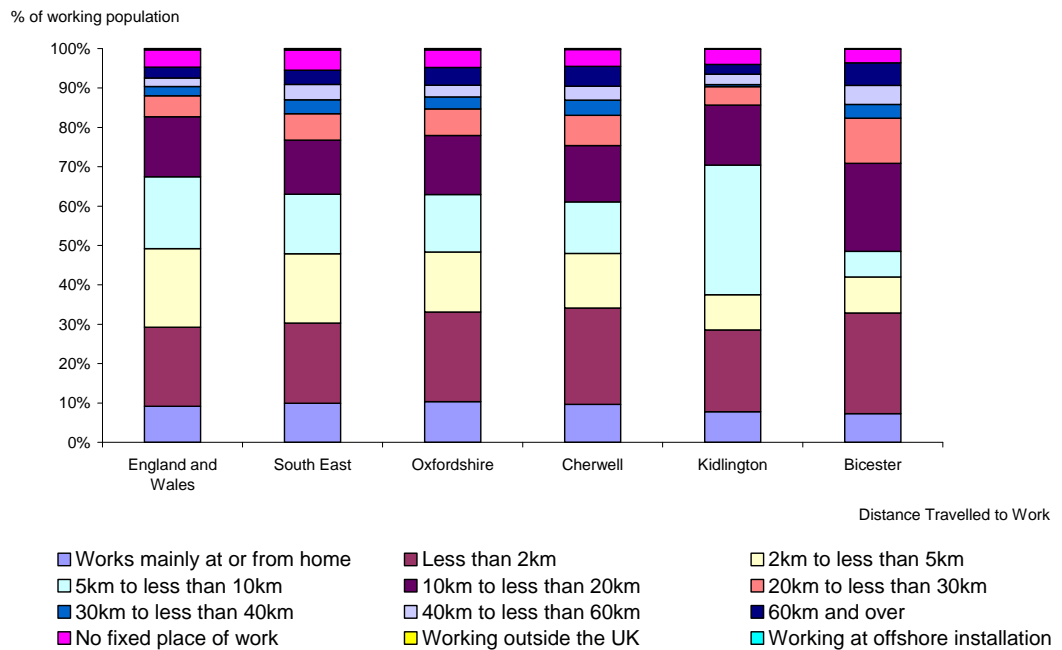
4.5 Travel to Work Distances

- 4.5.1 One of the main concerns for Bicester is balancing housing growth with economic growth and dealing with out-commuting issues. Currently out-commuting is high with 54% of the residential working age population travelling more than 5km to work (i.e. outside of Bicester). It is a key LDF priority to reduce this percentage.
- 4.5.2 Bicester's population travels long distances to work (Figure 4.2). According to 2001 Census data, Bicester has a greater proportion of its working population travelling more than 10km to work (48%) compared England and Wales (28%), the South East (31%), Oxfordshire (32%), Cherwell (34%) and Kidlington (26%).

Consequently, it also has the lowest proportion of its population travelling less than 10km (49%) compared to England and Wales (67%), South East (63%), Oxfordshire (63%), Cherwell (61%) and Kidlington (70%). Figure 4.3 provides a breakdown of distances travelled to work by ward. This shows that residents in Bicester North and Bicester South have the greatest proportions of people travelling more than 10km. Bicester East has the greatest proportion of residents travelling less than 10km to work.

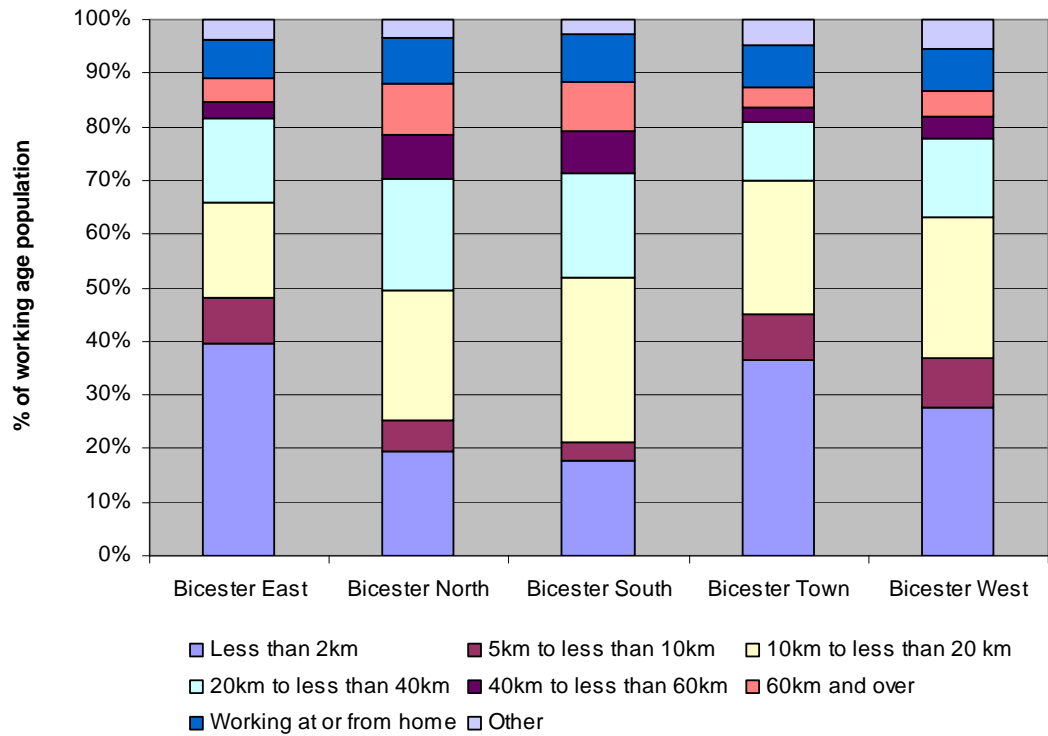
- 4.5.3 By virtue of its location and the nature of Cherwell District's settlement pattern, Bicester has two extremes of travel to work patterns – people tend to either work in Bicester itself (and therefore travel less than 2km) or commute out to Oxford, Banbury, Aylesbury Milton Keynes and London (and therefore greater than 10km). There is very little employment in the rural hinterland and hence very little representation in the middle of the travel distance distribution.
- 4.5.4 These patterns of travel indicate that residents of Bicester have to travel out of the town to access suitable employment.
- 4.5.5 Examination of mode data, also from Census 2001, indicates that a greater proportion of Bicester's population in employment travels to work by driving a car or van or as a passenger in a car or van (72%) than any of the other identified comparator areas (Figure 4.1). This compares with national and regional averages of 65% and 61% respectively. This may suggest that public transport provision to employees' place of work is not as good as in the identified comparator locations.

Figure 4.1 Distance Travelled to Work



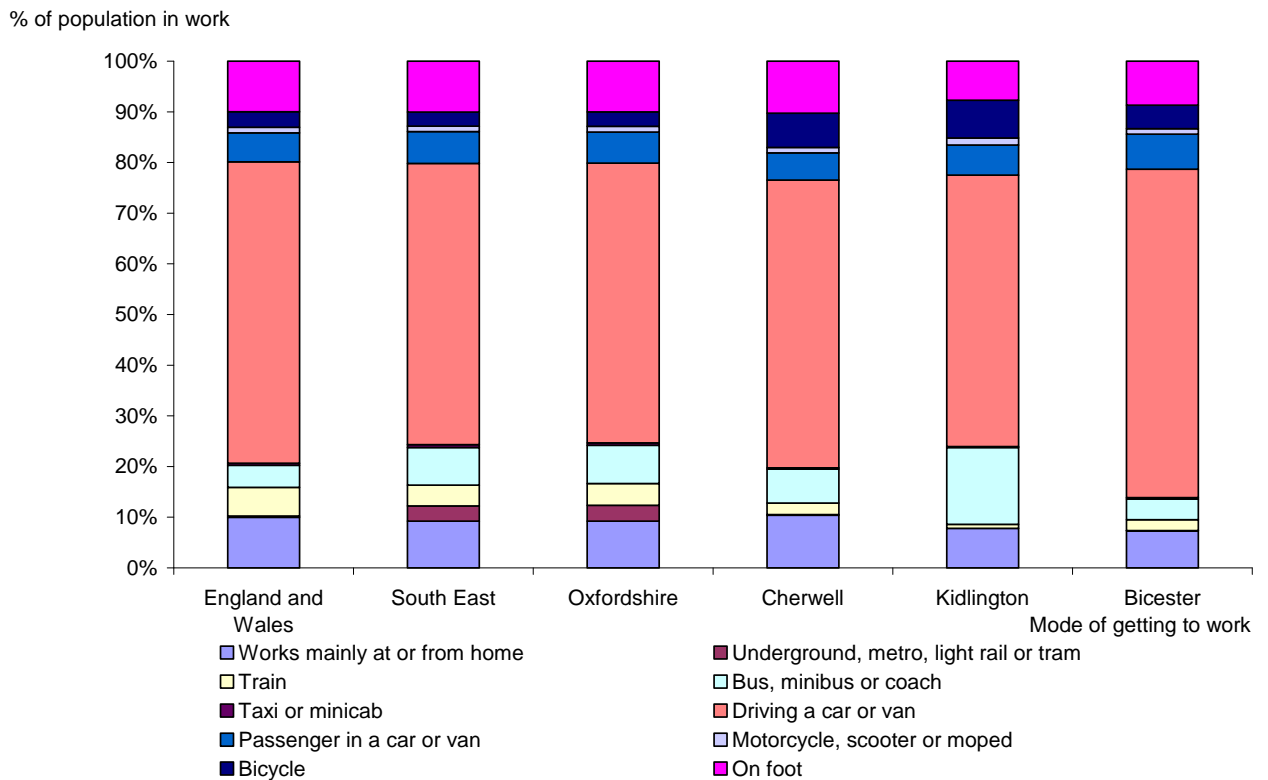
Source: Arup 2008 based on Census 2001.

Figure 4.2 Distance Travelled to Work – by Ward



Source: Arup 2008 based on Census 2001.

Figure 4.3 Mode of Travelling to Work



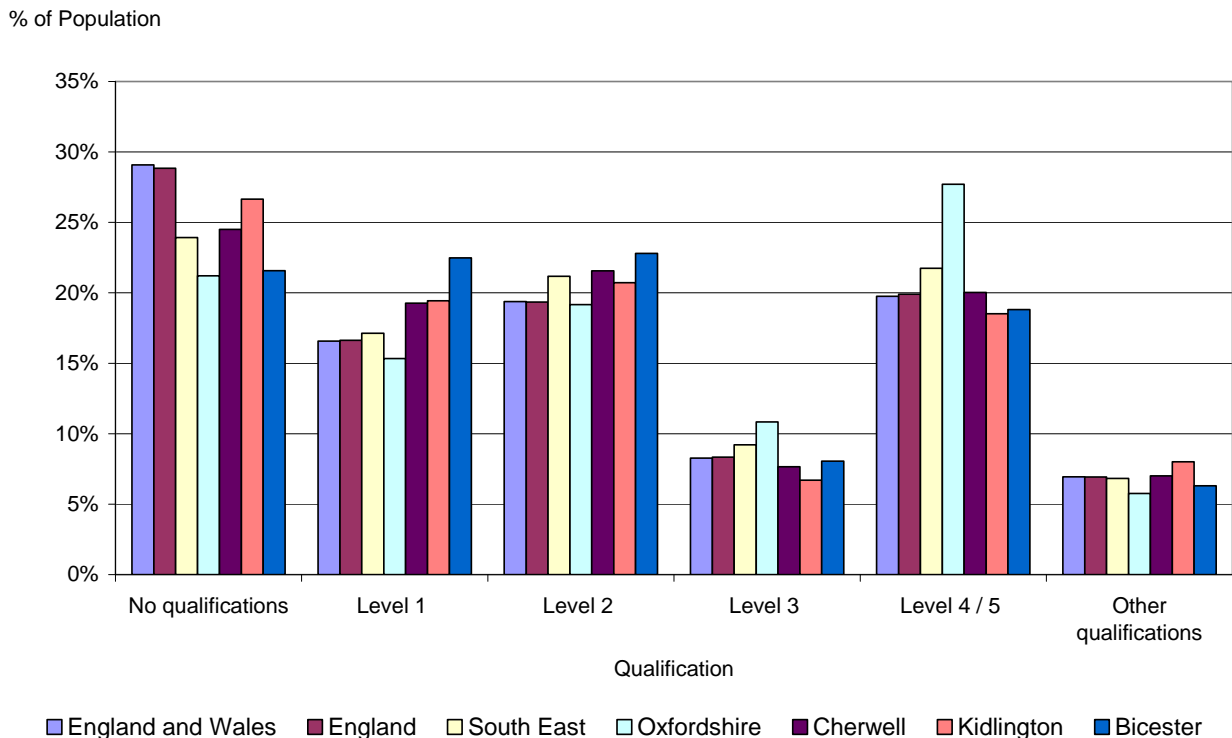
Source: Arup 2008 based on Census 2001

4.6 Educational Attainment

4.6.1 In terms of attainment among 16 year olds in Cherwell, 48% of male pupils, and 56% of female, achieved five or more GCSEs grade A*-C, both of which are considerably lower than the national averages of 54% (male) and 65% (female)⁵.

4.6.2 Figure 4.4 uses Census 2001 data to compare the skills profile of Bicester and Kidlington residents with those of Cherwell, Oxfordshire, the wider South East region and nationally. This shows that Bicester and Kidlington are under-performing in terms of the proportion of people with skills levels of 3 or higher when compared with the identified comparator areas. This picture contrasts with that for Oxfordshire as a whole, which possesses a much greater proportion of people with higher level skills, especially levels 4 and 5. There is a marked skew toward lower-level skills and people with no qualifications in Bicester and Kidlington. In particular, Kidlington and Cherwell have a relatively high proportion of people with no qualifications. Lack of basic skills in Cherwell is also identified as a key issue in the Cherwell Economic Strategy 2007-2011 – acting as a barrier to other skills which are becoming essential in the workplace, especially with the decline in skilled manual jobs in sectors such a manufacturing and construction.

Figure 4.4 Qualification Profile of Resident Population



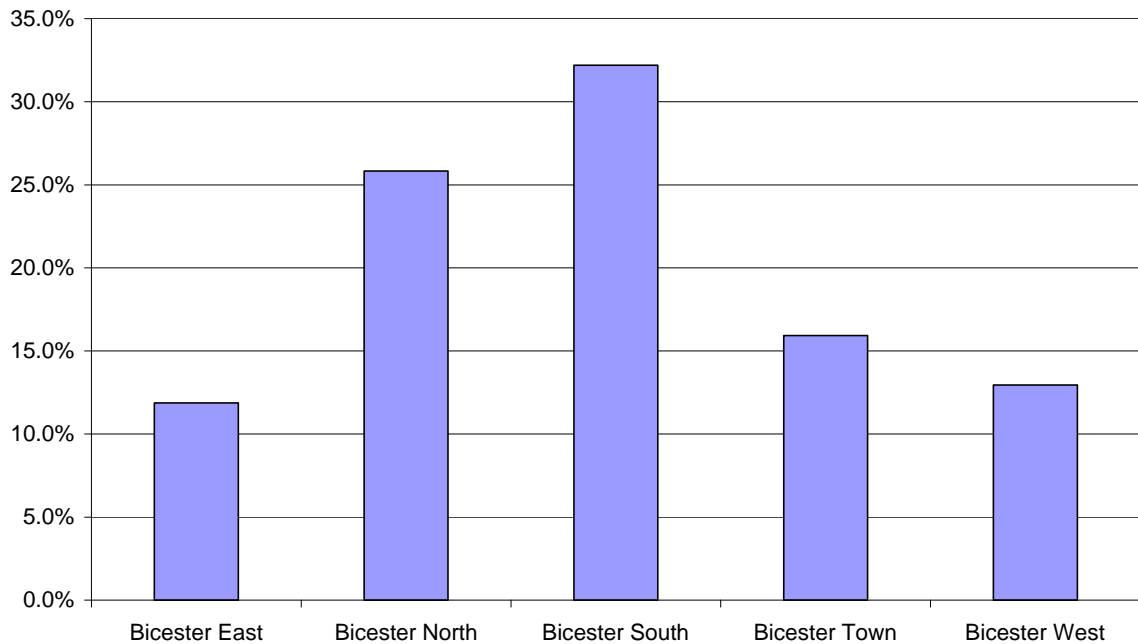
Source: Census 2001

4.6.3 There is also evidence that while as a whole Bicester under-performs on higher level skills there is considerable variation within Bicester (Figure 4.5). Bicester South and Bicester North wards have a greater proportion of people with higher level skills (Level 4/5) than in the South East and nationally. This picture becomes clearer when comparing this figure with breakdowns for income and travel to work.

⁵ Department for Children, Schools and Families - Pupil Annual School Level Census 2004/05

Figure 4.5 Higher Level Skills

Proportion of people with Level 4/5 skills



Source: Census 2001

4.6.4 Overall, the analysis of skills indicates that there Bicester has a lower proportion of people with higher level skills than identified comparators, although there are pockets of higher skilled people in Bicester North and Bicester South. There is also a need to reduce the number of people with no qualifications in Cherwell and especially in Kidlington – this is a barrier to transitional movements in employment requiring different skills.

4.7 Knowledge economy in Cherwell

4.7.1 The knowledge economy is a priority area in Cherwell’s Economic Development Strategy, 2006-2011. In informing the development of the strategy, a study was undertaken in 2007 to assess the current positions of the knowledge economy in Cherwell⁶.

4.7.2 The evidence from this study suggests that Cherwell’s economy lies in an intermediate position, between the knowledge intensive economies of the South East region together with parts of London, and those of more peripheral towns and cities that have been driven strongly by public sector employment

⁶ ‘The Cherwell Knowledge Economy: A baseline study for Cherwell District Council’ (May 2007), Goeconomics.

:

'On one hand Cherwell has a significantly lower proportion of its employment in private sector knowledge intensive activities than many local authorities in the South East but, on the other hand, it has levels of public sector employment (including many knowledge intensive public services) that are below the national average. In the absence of major urban centres it has not benefited from expansion in health and education services to the same degree as many regional centres in Britain. Equally, its growth in knowledge intensive private services has tended to lag behind regional and national benchmarks.'

4.7.3 The study points to the need to:

'try to improve the quality as well as quantity of local employment to attempt to close the gap between Cherwell and some of the authorities in the knowledge intensive core of the region'.

4.7.4 A number of recommendations for action are identified. These include:

- To look at the high to upper-middle end of the housing market, in order to attract the quality of knowledge worker residents that will improve the District's skills profile, income and labour market performance.
- Within a knowledge economy strategy, to include 'quality of place' and business improvements to town centres, to attract knowledge workers and talent-based businesses.
- To strengthen the business growth strategy, to translate Cherwell's positive enterprise performance into an equally positive knowledge-based employment performance.
- Strengthening of business-university links – Oxford, Oxford Brookes, Warwick and Coventry.
- Closer links with the regenerated, 'innovation driven' Oxford to Cambridge Arc.
- To develop a 'knowledge economy brand' for the District, a 'Cherwell Knowledge Product'.

4.7.5 Bicester's current lack of engagement in science and technology sectors (and in particular with spin-out activity from Oxford) arises for a number of reasons. It does not possess an academic presence from the university (unlike other locations such as Kidlington which has Begbroke Science Park). Spin-out companies related to the university typically want to be close to one of its facilities. However, this is not the only reason; perception is also important. While transport linkages between Bicester and Oxford are relatively good, there remains a greater psychological distance. In contrast, Kidlington is much closer to Oxford and, as well as having a university facility, is also the chosen location to live for many of the university's staff (due to the high costs of housing in Oxford). Therefore, to some degree, a social network also exists there. Consultation with the University highlighted the difference in perception by the university between Bicester and Kidlington as locations for their activities and related spin-out firms. This perception issue would need to be bridged to enable the knowledge economy to take off in Bicester. If it is not, then a more appropriate role for Bicester might be as supplier to the knowledge economy, one tier down.

4.8 Property Markets

4.8.1 Occupier demand for office space was relatively subdued in most parts of the country throughout most of the past decade. In the South it sank with the bursting of the ICT bubble at the turn of the decade but it picked up sharply in 2005. The foci for improvement were London and increased output from the business and financial services sector. Post-2005, the increase in occupier demand led to the amount of

available office space declining even though new building completions increased. However, this trend now appears to be reversing.

- 4.8.2 The demand for industrial and distribution space has not followed the decline in the office market during the past decade. It has remained steady, underpinned by demand for larger and taller warehouses. The market for pure industrial space tends to follow trends in industrial output, which have fluctuated around a long term declining trend in manufacturing. In terms of occupier preferences there has been consistent demand in recent years for units at the smallest end of the size range and also the large and tall warehouses, which provide the most efficient response to current logistical requirements.
- 4.8.3 Cherwell has slightly more than two million sq.m. of employment floorspace (Table 4.5), the majority of which is industrial floorspace (63%). Office floorspace only accounts for 23%. Bicester is not seen as a major office or industrial location and thus does not appear in most property market reports.

Table 4.5 Commercial Floorspace and Rateable Value in Cherwell, 2007

Employment Type	Floorspace (000 sq.m.)	% of Total Floorspace	Rateable Value (£000)
Industrial	1,274	63	53,124
Office	460	23	45,122
Retail	281	14	44,429
Total Commercial	2,015	100	-

Source: VOA (2008) Commercial and Industrial Floorspace and Rateable Value Statistics 2007

- 4.8.4 As noted in Cherwell's Employment Land Report, the majority of the commercial floorspace in the district is quite dated, with 50% built prior to 1970 (Table 4.6). Only warehousing has a relatively high proportion of new space with 33% built between 1991 and 2000. The ELR concludes that

'although there has been some development over the last decade, the majority of premises would be at least 20 years old or older. Most of the more recent development has been in the B8 warehouse category while the stock of smaller light industrial units appeared to be of a lower quality and getting a bit run down. There appears to be a lack of good quality office stock that would be suitable to modern businesses and more aligned with the development objectives of the Council.'

Table 4.6 Age of Commercial Floorspace Stock in Cherwell, 2003

Age	Office		Factory		Warehouse		All Types	
	Sq.m. (000s)	%	Sq.m. (000s)	%	Sq.m. (000s)	%	Sq.m. (000s)	%
Pre 1940	60	34.9	268	35.7	13	3.1	341	25.5
1940-1970	33	19.2	196	26.1	112	27.1	341	25.5
1971-1980	19	11.0	119	15.7	101	24.5	238	17.8
1981-1990	29	16.9	138	18.4	52	12.6	219	16.4
1991-2000	31	18.0	31	4.1	135	32.7	197	14.7
2001-2003	-	-	-	-	-	-	-	-
Total	172	100	751	100	413	100	1,336	100

Source: URS (2006) Cherwell District Employment Land Review; data sourced from VOA

- 4.8.5 Bicester has many established employment areas and business estates. There is some provision of smaller units within Bicester, for example, Bicester Innovation Centre, which provides small-scale units and business support services for start-up companies, including access to Oxford Innovation and SEEDA Enterprise Hub resources. Site visits to the main employment sites in Bicester revealed that the majority of town's sites contained relatively dated stock, although there are some more modern developments. There was evidence of vacancy and a need for refurbishment on some of the estates. It is assumed that current rents/ returns mean that this is not a viable option for owners.
- 4.8.6 The Bicester and Central Oxfordshire Issues and Options Paper notes that some of the stock within the employment areas constructed in 1960s and 1970s is now unsuitable for modern business needs and is therefore in need of revitalisation and/or redevelopment.
- 4.8.7 At the first consultation workshop, a view was expressed that although Bicester has available office space, the offer is dated and does not meet current requirements; and, further, that rental values are not high enough to justify further investment in existing stock. When interviewed, an owner of B2/ B8 commercial properties reported current vacancies, which were attributed to the fact that units do not meet existing needs. Although this is not conclusive evidence, in conjunction with the above conclusions, it would appear that the current stock is in need of modernisation.
- 4.8.8 In July 2008, a total of 56,200 sq.m. of B-class floorspace was available in Bicester and Kidlington.

Table 4.7 Snapshot of Available Property

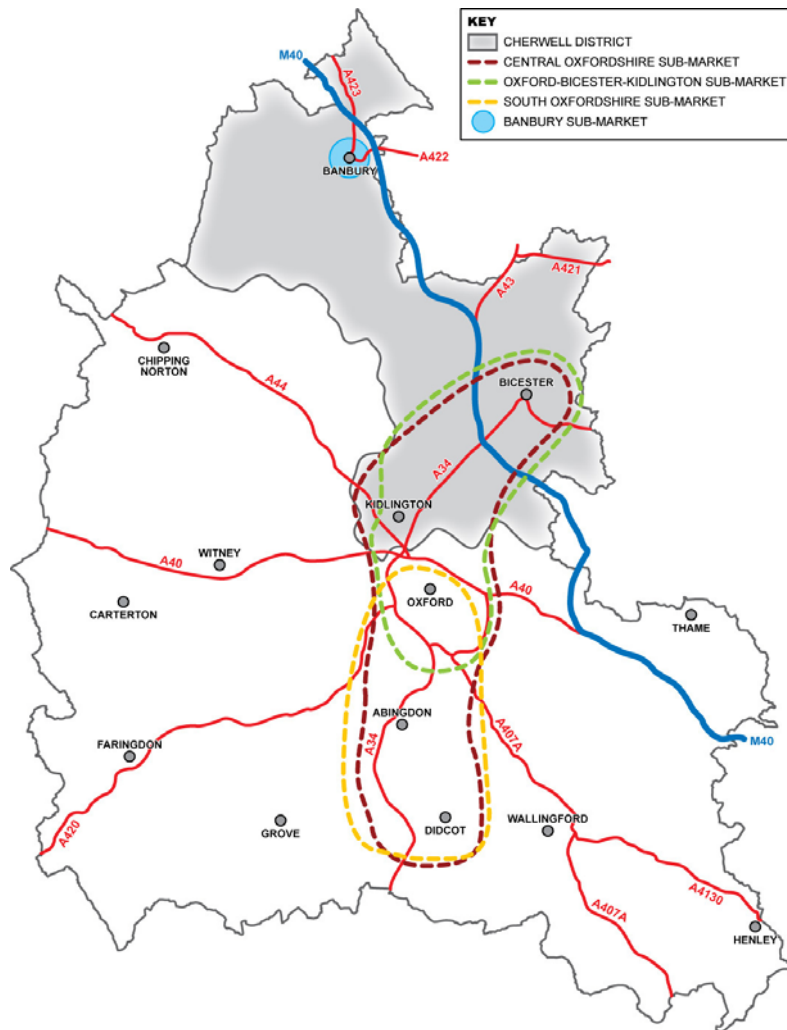
	Industrial		Office	
	No. of Units	Sq.m.	No. of Units	Sq.m.
Bicester	40	36,390	20	3,646
Kidlington	32	10,711	16	5,453

Source: Cherwell-M40 Investment Partnership (2008) – property search undertaken 24 July 2008

- 4.8.9 Analysis of national non-domestic rated (NNDR) properties provided by Cherwell District Council showed that in August 2008:
- Out of the 4,190 NNDR properties in the whole district, 326 were empty – a 7.8% void rate;

- Out of the 868 NNDR properties in Bicester Main (i.e. postcode area OX26), 86 were empty – a 9.9% void rate; and
 - Out of the 589 NNDR properties in Kidlington (i.e. postcode area OX5), 45 were empty – a 7.6% void rate.
- 4.8.10 The introduction of NNDR on empty commercial properties could have a significant impact on the old vacant stock in Bicester. Given the unattractiveness of some of the most dated current provision, this could provide the stimulus for regeneration of some sites (subject to other general economic conditions). In particular, this could provide the impetus for regeneration of the Launton Road area.
- 4.8.11 Historically, Bicester's location has favoured B8 development. It forms a significant element of employment land take up and market pressures for this type of use are strong.
- 4.8.12 However, other developments have helped to diversify the town's economy. For example, Avonbury Business Park has been successful and has gained the interest of a number of high-tech companies. The presence of such businesses was seen as evidence that Bicester based firms are engaged in the kind of high-tech activities commonly associated with Oxford's various science parks and innovation centres.
- 4.8.13 Much of the available office space in Bicester is in the larger size categories, which is at odds with the demands from many new start-up businesses, which tend to require smaller units. Overspill pressures within Cherwell are leading to movement of companies between market areas. For example, overspill from Oxford is moving towards Bicester, Kidlington and Abingdon; and overspill from Kidlington has moved to Bicester, the example of Fresh Direct was cited. New housing has also led to growth pressures; there is a need for a supply of modern business space.
- 4.8.14 Bicester and Kidlington operate as two distinct markets. Kidlington is perceived to be linked to the Oxford market and is considered a dormitory town of Oxford, benefiting as it does from access to the city via the A44. As such it has developed a number of office and business parks. Bicester's market, on the other hand, is reported to have developed due to its location on the M40 and the high levels of housing growth. Kidlington has attracted high tech companies but these have tended to be at the lower end of the high tech sector. It is suggested that Bicester requires a science/ intellectual presence in order to make a science park viable in this location: 'it is not just a case of providing better quality space'.

Figure 4.6 Oxfordshire Employment Land Sub-Markets



Source: URS (2006) Cherwell District Employment Land Review

4.8.15 The Employment Land Review examines past demand in terms of completions of B class space over the period 1994-2004 and take up of B-class space over the period 2001-2004 (Table 4.8). This reveals an annual average completion of 27,519 sq.m. in Cherwell, of which 25% of this new stock was built in Bicester and 18% in Kidlington. The majority of the growth (in terms of floorspace) in Bicester was for warehousing while in Kidlington the greatest demand was for offices. The average annual take-up was 10,094 sq.m. (net internal area (NIA)) in Bicester and 3,954 sq.m. (NIA) in Kidlington. It should, however, be acknowledged that since the M40 has only reached past Oxford to Warwick since 1994 (and in particular, the key A34/43 routes), there may have been an early concentration of B8 space opening in the following years.

Table 4.8 Cherwell B Class Average Annual Completions, 1994 - 2004

	Office		Industry		Warehouse		Total	
	sq.m.	% of District	sq.m.	% of District	sq.m.	% of District	sq.m.	% of District
Bicester	736	12	1,652	22	4,532	34	6,919	25
Kidlington	1,832	30	1,479	20	1,553	12	4,864	18
Cherwell	6,099	100	7,492	100	13,297	100	27,519	100

Note: Completions data measures new stock where 25 or more employees are expected. The sq.m. given are for gross external floorspace.

Source: URS (2006) Cherwell District Employment Land Review

4.8.16 The ELR also examines historic demand within the identified market areas and concludes that Bicester represents:

- 25% of Cherwell's total demand,
- 14% of the Oxford/ Bicester/ Kidlington market area total demand (Kidlington represents 10%); and
- 7% of Oxfordshire's overall demand.
- On the basis of this demand analysis, the ELR concluded that if land were constrained in the larger markets, for example, Oxford, but were available in Bicester or Kidlington, there could be scope for demand to be re-directed to those towns, which may result in demand for more employment land. It also concluded that Bicester had sufficient supply to accommodate 24 years of demand while Kidlington had 2.9 years worth of supply. The ELR recommends that 89ha of available developable land be safeguarded for employment in Cherwell, of which 37ha should be in Bicester and 3.2ha should be Kidlington.

4.8.17 Only very limited evidence of unmet demand was discovered during the course of the study. None of the three local surveyors interviewed identified this as an issue in either Bicester or Kidlington. Only one firm, employing around 100 people, reported they were struggling to grow in Bicester as they need a larger (B8) site. The decision to locate in the town was identified as 'inspired action' due to its very central location within the country. The organic growth of Bicester has meant that the company's site is no longer on the edge of town, which is not ideal given the traffic movements created by the business. Although the firm wants to stay in Bicester, a lack of alternative sites means they are being forced to look further afield, even outside of Oxfordshire in order to meet businesses priorities.

4.8.18 There could potentially be some development in the pipeline to provide for any unmet demand. It is understood that Oxford Innovation is looking to grow on a new 'gateway' site, which could represent a key anchor employment site.

4.9 Retail

4.9.1 CBRE undertook a PPS6 assessment of the retail offer in Cherwell in 2006. The three main retail centres in Cherwell, in descending order of size, are Banbury, Bicester and Kidlington. Additional retail provision can be found at the Bicester Village and in out-of-town retail warehouses.

Bicester

- 4.9.2 Bicester is thought to be a fairly healthy shopping centre, although somewhat lacking in vibrancy. Bicester has a large number of retail units; however, the PPS6 assessment and Health Check concluded the majority of these were too small to meet the larger requirements of national operators. The town centre offer comprises mainly comparison shops and service uses, which reflects the predominantly localised role that the centre performs.
- 4.9.3 The PPS6 assessment found demand for retail units within the town centre from business in the comparison, convenience and service sectors, and low vacancy levels. A search of available commercial property on the Cherwell-M40 Investment Partnership's database revealed only 11 vacant units (1,251 sq.m.) as at 24 July 2008 – suggesting that vacancy levels are still relatively low. The PPS6 assessment and 2007 Health Check identified physical potential within Bicester for expansion, in particular through the redevelopment and intensification of existing sites, and suggested that Bicester town centre should be a priority for new development.
- 4.9.4 One key indicator of viability of town centres is the commercial yield on non-domestic property. The VOA Property Market Report (2007) shows that since the turn of the century, the commercial yield in Bicester town centre has improved from 8% to 6%, although as might be expected, given its relative position in the retail hierarchy, the yield is still significantly less than that in Oxford (4%). The PPS6 assessment reviewed rental values over the period 2001-2005, which also showed that Bicester performed poorly compared to other nearby centres, such as Banbury, Oxford and Witney. The PPS6 assessment concluded that the lack of rental growth reflected the lack of significant recent investment in recent years. Although rental levels had remained constant, yields had improved over the period 2002-2006, suggesting good prospects for increased rental levels in the future. It was thought that the redevelopment of Crown Walk shopping centre and Bure Place would improve rental levels.
- 4.9.5 Current or planned development can also be a viability indicator. A major mixed-use development is proposed for Bure Place Bicester. The Council has appointed Stockdale Land, who in partnership with Sainsbury's, are to undertake comprehensive redevelopment of the area between Sheep Street and Manorsfield Road. The scheme proposals include a cinema, food store, car parking, retail units, restaurants/ cafes, a new bus station, residential units and a new civic building including a library. The scheme also includes the refurbishment of the existing Crown Walk shopping centre. CBRE recommended the redevelopment of this site as a priority above all other sites, and, further, that if the scheme was to go ahead that it would stave off retailer demand in Bicester town centre for the near future. Although the current market conditions are likely to delay the start of the Bure Place development, it is still anticipated that this scheme will go ahead.

Bicester Village

- 4.9.6 Bicester Village opened in 1992 and provides 12,820sq.m. of floorspace. The Village is currently undergoing an expansion, incorporating 29 shops, a restaurant and a two-storey car park. The scheme is due to be completed in October 2008 and will increase the size of the Village by a quarter.
- 4.9.7 The PPS6 assessment concluded Bicester Village is a high quality shopping centre, which attracts both local and tourist (national and international) trade. However, as it is not a designated PPS6 'centre', the CBRE assessment concluded that it is not an appropriate location for future retail development.

Kidlington

- 4.9.8 The PPS6 assessment concluded that Kidlington is a local shopping destination that primarily serves the local area. The centre offers relatively small units, typical of the function it serves. The majority of the outlets are used for service functions and comparison shops. However, although convenience shops are low in number, the proportion is above the national average. This assessment was consolidated by the 2007 Health Check carried out by Cherwell District Council, which also concluded that Kidlington village centre operates as a local shopping centre, primarily serving customers from the local vicinity. The centre was thought to operate as a top-up centre and it was thought that the convenience offer reflected this function.
- 4.9.9 The PPS6 assessment found little demand for retail units from national retailers. It was concluded that the weak demand was not surprising given the size of the centre and the wider trend for national retailers to prefer larger, stronger centres. Independent retailers were thought to be the main source of demand. The 2007 Health Check confirmed that the village centre is well-represented by independent and niche retailing. The PPS6 assessment found rental values to be lower than Bicester and Banbury, reflecting the lower demand for retail premises and its lower status in the retail hierarchy (Table 4.9). The Assessment also reported low vacancy rates, and analysis of the available commercial property data on the Cherwell-M40 Investment Partnership website suggests this trend has continued since only two units (159 sq.m.) were vacant in July 2008⁷. The PPS6 assessment and 2007 Health Check identified physical potential within Kidlington for expansion, in particular through the redevelopment and intensification of existing sites, such as the main car parks. Subsequent to these studies taking place, a mixed-use development which provided new and larger retail units for the village centre was constructed on the site of the former market.

Table 4.9 Competing Shopping Destinations – Non Food Goods

	Most Popular Destinations Where Respondents Shop More Often than in Kidlington % of Respondents	Most Popular Destinations Where Respondents Shop Less Often than in Kidlington % of Respondents
Banbury town centre	10.2%	29.7%
Bicester town centre		16.1%
Bicester Village	-	5.1%
Milton Keynes town centre	2.5%	5.1%
Oxford city centre	33.1%	31.4%
Reading town centre	5.1%	2.5%
Royal Leamington Spa	-	2.5%
Witney town centre	2.5%	-

Source: Cherwell District Council (2007) Kidlington Health Check

⁷ Source: Cherwell-M40 Investment Partnership (2008) – property search undertaken 24 July 2008

4.9.10 The 2007 Kidlington Health Check Action Plan produced by Kidlington Parish Council suggested that the centre was falling short of its potential and that recent developments had demonstrated scope for further development and upgrading. Community consultation undertaken as part of this health check revealed a limited range of shops, traffic and environmental issues as key areas of dissatisfaction. The survey carried out as part of Cherwell District Council's 2007 Health Check again revealed that the poor range of shops was the main reason for dissatisfaction with the centre, and, conversely, improving the range was the most desired improvement. Oxford was the main alternative destination for surveyed shoppers, and few shoppers were attracted to either Bicester or Banbury town centres to meet needs for non food goods. However, overall, the Health Check concluded that the 'village centre remains a vital and vibrant centre for the role and function in the hierarchy of local centres'.

4.10 Conclusions

- 4.10.1 A number of conclusions are drawn from the above analysis.
- Bicester has grown by over 10,000 residents since 1991. In contrast, Kidlington's population has remained largely static.
 - Cherwell has had an economy largely based on industry and distribution, although proposals have emerged for office and science-based employment.
- 4.10.2 One of the main concerns for Bicester is balancing housing growth with economic growth and dealing with out commuting issues. Out-commuting is currently high, with 54% of the residential working age population travelling more than 5km to work. It is a key LDF priority to reduce this percentage.
- 4.10.3 In terms of attainment among 16 year olds in Cherwell, 48% of male pupils, and 56% of female, achieved five or more GCSEs grade A*-C, both of which are considerably lower than the national averages of 54% (male) and 65% (female).
- 4.10.4 The area has a broad retail offer ranging from the facilities of a large district centre in Bicester; local provision in Kidlington; and Bicester Village, drawing on a very wide regional/national/international catchment. All have prospects for growth.

5 The Future of Bicester and Kidlington Without the Proposal

5.1 Emerging Regional Policy

- 5.1.1 The draft South East Plan, A Clear Vision for the South East, (March 2006) identified part of Cherwell District, including Bicester and Kidlington, as belonging to the Central Oxfordshire sub-region. Bicester is identified as one of four main locations for development in the sub-region for both housing and employment growth (Policies CO1 and CO5). The draft Plan considers that Bicester's strong rail links to London and other neighbouring centres means it is well placed to capture and realise economic potential within the sub-region and to support clusters of high value employment. However, it acknowledges that direct action is likely to be needed to achieve this and prevent the town acting as a dormitory settlement. Outside of the four main growth locations, limited development is supported within other communities, such as Kidlington, to support the social and economic well-being of these places.
- 5.1.2 The EIP Panel and Secretary of State in her Proposed Changes to the Plan support the polycentric objectives in the Plan, i.e. that growth should be concentrated in the four identified locations. They further recommend that it should be made clear that the focus of growth at the four towns is important in order to improve their self containment in both social and economic terms, and advise that Policy CO1 should be amended accordingly.
- 5.1.3 The draft Plan notes that Bicester's location with strong rail links to London and other centres makes it ideally located to 'capture and realise the potential of the sub-region' and that the proposed East West rail improvements could contribute to improving its economic position and 'support clusters of high value employment'. The town is considered well located for 'research based activities needing good transport connections' and as part of the Oxford to Cambridge Arc within the Oxford area of influence. The Panel accepted the objective to promote Bicester as a location for spin-off activity as part of the Oxford to Cambridge Arc and that additional economic activity would help to reduce its current dormitory function. While the Secretary of State emphasised that Bicester should 'seek to maximise the benefits accruing from its location', i.e. its position on the Oxford to Cambridge Arc and the rail network, and to improve its self containment.
- 5.1.4 The draft Plan acknowledged that a local economic and marketing strategy is needed to ensure that the Bicester's potential, including its position on the Oxford to Cambridge Arc, is recognised externally, in order to attract development and inward investment. The Panel Report noted that Bicester does not yet have a market profile for high-tech activity and the Secretary of State confirmed the promotion of Bicester as a new location for higher value and knowledge-based businesses as a priority, either as part of the Oxford to Cambridge Arc initiative or a separate initiative.
- 5.1.5 The Panel report noted that noted Bicester already has a relatively large land supply (around 30ha hectares in 2005 – equivalent to 15 years supply). The Secretary of State suggested there is a need for further provision in Bicester and proposed revised wording for Policy CO5 (to be renumbered as CO2), which specifically relates to justified provision of additional employment land in Bicester for the expansion and relocation of existing firms in order to foster knowledge-base industry.
- 5.1.6 The Panel Report suggested that any releases of employment land on the northern edge of Oxford (excepting the Peartree safeguarded site) could be detrimental to Bicester's economic aspirations. The Secretary of State went further to state that land to the north of Oxford should not be released for employment if it 'could adversely affect the future economic buoyancy of Bicester'.
- 5.1.7 The draft Plan proposes 5,800 dwellings in Cherwell (part) over the period 2006-2026, the majority of which (4,300 dwellings) would be in Bicester. The Secretary of State's Proposed Changes raised the overall scale of housing to be delivered in

Cherwell (part) to 6,400. The Panel Report supported the proposed quantum of dwellings in Bicester and further commented 'until it [Bicester] becomes more attractive to new sources of economic activity ... [there] is no case for increasing this guideline figure.' However, the Secretary of State disagreed with the Panel Conclusions about Bicester and raised the minimum quantum in Bicester to 4,900 (an increase of 600 dwellings compared to the draft Plan).

- 5.1.8 The Secretary of State acknowledged that the Weston Otmoor Eco Town has been shortlisted since the EIP, and emphasised that the Cherwell District Council will have to take account of the proposal when considering the delivery of housing provision.

5.2 Regional Economic Strategy

- 5.2.1 The Oxford/Central Oxfordshire area has been designated as a 'Diamond for Investment and Growth' in the Regional Economic Strategy, with the potential to 'act as a catalyst to stimulate prosperity across wider areas, and offer scope for further sustainable growth based on targeted investment in their infrastructure'.
- 5.2.2 A total of eight Diamonds were identified in the RES. All eight were highlighted as a focus for investment in infrastructure in the Regional Funding Allocation (RFA) guidance submitted to central government in January 2006. The RES reports that 'it is the concentrations of people, employment, built assets, knowledge, transport, networking, creativity, leisure, culture and diversity which give [the Diamonds] the potential to be economic catalysts for the region as a whole. This needs to be reinforced by selective infrastructure investment as a stimulus to sustainable growth'.
- 5.2.3 Bicester is therefore identified as a key location to accommodate future growth in the South East regional economy.
- 5.2.4 The local economic development strategy for Cherwell sets out the direction for the Cherwell economy over the period 2007-2011⁸. It supports and develops themes outlined in the Community Plan. At a broad level, a key cross-cutting objective of the strategy is to appropriately balance Cherwell's population growth, economy and infrastructure. The vision is for a strengthening of the area's technical capacity, building on strengths in motorsports and high technology specialist engineering sectors. On a sectoral basis, bio-technology is also expected to become increasingly important, especially in the southern part of the District.
- 5.2.5 The core economic objectives are to ensure the creation of additional employment to balance predicted population growth, increasing the rate of growth in the 'knowledge' sector and improving the quality and offer of commercial business space.
- 5.2.6 The key performance indicators set out in the Cherwell Economic Development Strategy include:
- 6,200 net new jobs by the end of 2011;
 - Reduce the differential between place-of-work wage rates between Cherwell and the South East from 91.8% of SE average (2005) to 98% by 2011;
 - Reduce the numbers of people with no qualifications from 24.5% (2005) to 20% by 2011; and
 - Knowledge economy – increase the proportion of people in SOC2000 groups 1-3 from 35.8% (2003/04) to 40% by 2011.
- 5.2.7 The vision outlined for Bicester is to become a more attractive work location for its more qualified and higher-earning residents and for it to become a significant location within the Oxford-Cambridge Arc. This is based on growth in science and technology based businesses, exploiting innovations and spin-outs from academic

⁸ Economic Development Strategy 2007-2011, Cherwell District Council.

- research. It also aims to build upon its strengths in materials engineering and bio-technology. Overall, there is an emphasis that Bicester should grow its 'knowledge' economy.
- 5.2.8 The vision for Kidlington builds on its relationship with Oxford, being a quality centre for office and laboratory base businesses especially in the bio-technology sector and other spin-off activities. The strategy is to retain the aspects of village life that make up much of its attractiveness as a place to live.
- 5.2.9 With three years left and in the context of an economy strongly affected by the credit crunch, it now seems unlikely that the Cherwell targets will be met. However, they are feasible over a longer timescale.
- 5.2.10 It is anticipated that there will be further growth in the knowledge and high tech sectors in Oxford leading to increased demand for science park and innovation centres. The ELR concludes that, under the right conditions, growth in Oxford could lead to overspill in surrounding towns, such as Bicester and Kidlington, since they are part of the wider local property markets.
- 5.2.11 At the South East Plan EIP the demand for employment land in Oxford was examined. It was concluded in the Inspectors Report that supply was constrained, with, for example, only 4-5 years of supply left at both the Oxford Science Park and Oxford Business Park. In the absence of further sites coming forward in Oxford, this would suggest a high potential for overspill of activity towards Bicester and Kidlington due to availability of sites. However, the EIP report concluded that further employment land is required at Oxford, which is likely to absorb much of the demand. There is a current safeguarded site (Peartree), north of Oxford. This site, referred to as the 'North of Oxford Gateway, land west of A34' in the Bicester and Central Oxfordshire Issues and Options Paper, is identified for the 'Northern Gateway' scheme.
- 5.2.12 The site was considered as part of the South East Plan EIP, and the Panel Report concluded that this development could be adversely competitive to Bicester's aspirations. The Secretary of State's Proposed Changes states that, although the possible of use of the land at Peartree will be a matter for local determination, '*land should not be released for employment to the north of Oxford that could adversely affect the future economic buoyancy of Bicester and Witney*'. The City Executive Board of Oxford City Council has recently approved the principle of partnership working with developers for the production of the Northern Gateway Area Action Plan Development Plan Document⁹.
- 5.2.13 The University of Oxford has a desire to develop land around its existing activities at Begbroke Science Park to the west of Kidlington - although this land is in the Greenbelt. The University of Oxford owns 125.5 hectares of land around its Science Park at Begbroke (4.1 hectares) and made a representation for development in the consultation on the Draft South East Plan. The site is in the so called 'Kidlington and Yarnton gap' and referred to as 'Land to the west of Kidlington' in the Bicester and Central Oxfordshire Issues and Options Paper.
- 5.2.14 The University purchased the site at Begbroke in 1998. The core site extends to around 4 hectares but the total land holding is 129.6 hectares. The rationale for purchase was a desire to expand research activities that do not need to be located in central Oxford, in a less constrained environment. The main building is predominantly occupied by university research from the Department of Materials and some Engineering. All of the remainder of the site was taken by spin-off companies and by Oxford Innovation Ltd, who set up a small innovation centre. The university has built new laboratories within the brownfield boundary.
- 5.2.15 The University's future vision for Begbroke is to have space for the development of new University research laboratories that operate outside the current 'departmental' structure and reflect 'sectors' of activity. The core of this would be more innovation space. However, it also seeks to provide adequate housing for scientists, technologists and supporting staff. The university does not have any firm plans to locate any of its activities in Bicester.

⁹ City Executive Board Meeting Notes 23rd July 2008, Oxford City Council.

5.3 Evidence of the Bicester Prospects

- 5.3.1 Within Bicester, the best test of viability is whether or not any development is taking place or planned in the pipeline. In 2006, the allocated employment site, Gavray Drive, was approved on appeal for housing development (500 units) and other associated uses. The Secretary of State (2006) supported the Inspector's conclusions that the employment designation for the site was no longer appropriate given that it has remained undeveloped despite being allocated for nearly 20 years and the unlikely prospects of securing employment development in the near future. It was further concluded that there was a more than adequate supply of employment land and premises in the area to meet Bicester's contribution to Cherwell's economic development strategy.
- 5.3.2 In 2007, an appeal was allowed for the land north of Skimmingdish Lane (1.67ha), which approved the use of a former allotment site for B1 development (Figure 5.1). The Inspector concluded that there had been a change in circumstances since the Gavray Drive decision and that there was a shortage of land available for B1 development in the immediate future, which would hamper the 'pressing need to bring forward additional, high quality business developments in Bicester in the short term' and would frustrate the aspiration to redress the population/ employment imbalance in the town.

Figure 5.1 Skimmingdish Lane Development Site

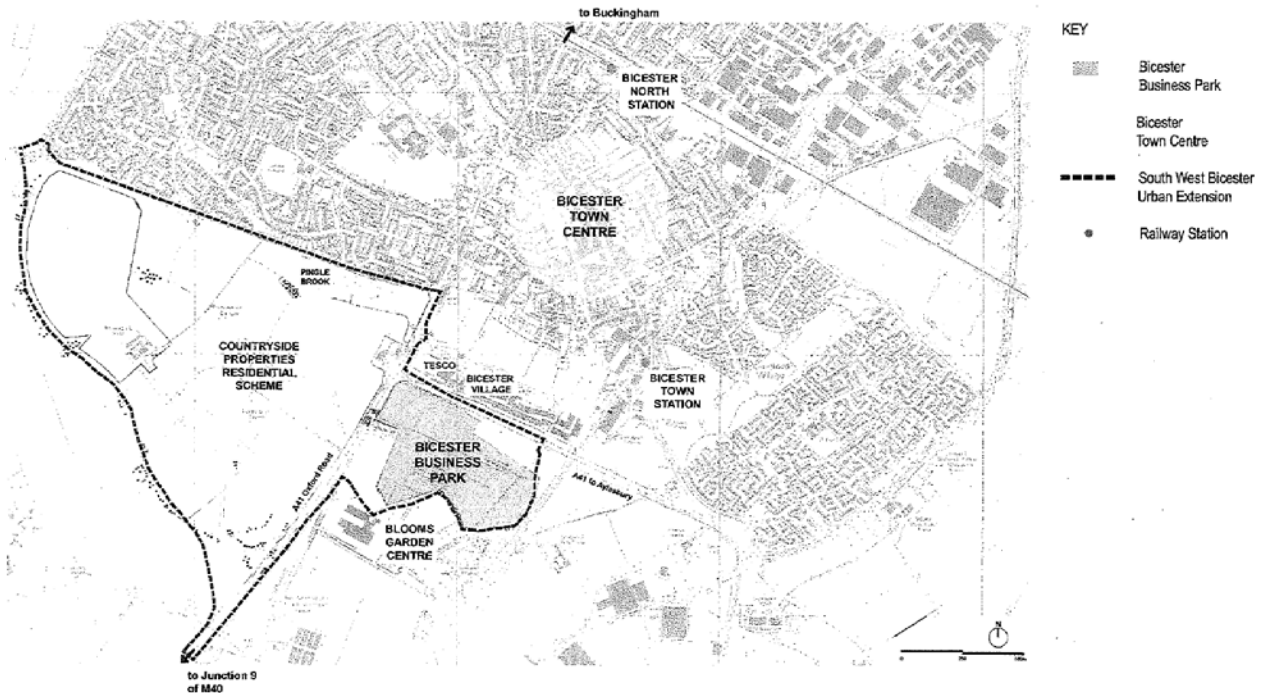


Source: Carter Jonas (2008) Skimmingdish Lane Sale Brochure

- 5.3.3 Planning permission has also been granted, subject to successful S106 negotiations, for South West Bicester. This is primarily a housing development but also includes two hectares of employment land. The intention is that the employment area, which is located immediately to the west of the A41, will act as a 'commercial gateway' to Bicester when arriving from the south. At the consultation event, it was suggested that the delivery of this site will be delayed until market conditions have improved.
- 5.3.4 A business park is also planned, just off the A41 between the existing Wyevale and Bicester Village retail outlets (Figure 5.2). Resolution to grant subject to S106 negotiations has been given for an outline planning application for the construction

of a 60,000 sq.m. business park incorporating offices and a 150-bed hotel. The Highways Agency has directed that the planning permission should include a restriction whereby only 25,000 sq.m. can be built until significant improvements to Junction 9 of the M40 have been undertaken. In discussions, the developer, London and Metropolitan, reported that the site will be delivered over a ten-year period and that although some employers have already expressed interest in the site, development would not begin until the market conditions have improved. London and Metropolitan estimate that 3,000 jobs would be created on the business park when fully implemented. When this business park is delivered, it will help to improve Bicester's offer in terms of B1 space.

Figure 5.2 Bicester Business Park



Source: London Metropolitan (2008) Bicester Business Park Brochure

5.3.5 The current economic climate seems to be subduing the local market generally. The RICS Commercial Market Survey for Quarter 1 2008 reported the following comments from a local surveyor (Christopher White, White Commercial Ltd): 'Bicester – reasonable demand couple with a shortage of supply. Values falling due to illiquidity problems and rate factors.' It is assumed, however, that this position will be reversed following improvements to macro-economic conditions. In discussions, a local surveyor suggested that there is potential for expansion in Kidlington and Bicester.

5.4 Additional Employment Capacity in Bicester and Kidlington

- 5.4.1 The Cherwell employment land report (ELR) identifies five additional sites in Bicester (38.4 ha) and six sites in Kidlington (3.2 ha) as potentially available for development. The sites were a combination of designated but undeveloped employment sites allocated in the Non-Statutory Cherwell Local Plan 2011 and new sites identified by consultants as part of their survey work.
- 5.4.2 One of the larger sites in Bicester has subsequently been granted planning permission for a residential scheme and one site in Kidlington has been developed. This has reduced the overall quantum of potential development sites in Bicester to 23.7 ha and Kidlington to 2.8 ha.
- 5.4.3 The Bicester and Central Oxfordshire Issues and Options Paper (2007) suggests there is need for further employment land to be identified in order to widen the range of employment opportunities and to support economic growth. A number of sites for employment or mixed use are identified for discussion purposes only at this stage. If all of these sites were to be included in the Development Plan Document, there would be a total allocation of at least 118 hectares of dedicated employment land in Bicester and 12 hectares in Kidlington. However, it is unlikely that all of the proposed sites will come forward in the final Preferred Option for the LDF, as more detailed analysis and consultation will mean that some sites are rejected.

5.5 Future Economic Challenges

- 5.5.1 The Cherwell Economic Strategy sets ambitious but achievable targets. The delivery of 6,200 net new jobs will require a significant turn around of recent past trends – with ABI data showing a decline in employment in Cherwell over 2000-2006 of 2,893, and rise of only 1,490 more recently in 2003-2006. A major emphasis of the strategy is increasing the value of the economy, and in particular the ‘knowledge’ economy. The reasoning of this emphasis appears sound, given the local spatial context of Bicester and expected future out-spill of high-value economic activity from Oxford due to physical constraints to growth. However, an increase in the proportion of those in employment that are employed in ‘knowledge’ economy jobs to 40% is ambitious, given that Bicester has not yet fully established itself in the ‘knowledge’ economy market.
- 5.5.2 Delivering the strategy is feasible but challenging. It is likely that some form of ‘step change’ will be required for Bicester to make real progress in the ‘knowledge’ sector. However, discussions undertaken during the consultations suggest that Bicester is at a crucial ‘tipping point’ in its development which could change its fortunes. Particular issues that need to be tackled to deliver the strategy include:
- Attracting new businesses to Bicester;
 - The area’s branding; and
 - The quality and suitability of the employment floorspace offer.
- 5.5.3 Realisation of some new employment proposals is critical to demonstrating the market potential of the available sites within Bicester and Kidlington. The Bicester business park proposal has sufficient critical mass to realise this demonstration effect. Over and above this, there is scope to develop a more proactive approach to marketing Bicester’s profile and in strengthening links with Oxford City. This is because the Oxford sub-region has world class prestige and visibility, science, and a community of expertise to build on.

5.6 Infrastructure Capacity

- 5.6.1 One of the major challenges facing Bicester is congestion – as identified by the Local Transport Plan (LTP). This identifies particular issues with the A34-M40 to Oxford and A41-King’s End, Bicester to M40 as well as the M40 junctions. A greater proportion of Bicester’s population travel more than 10km to get to work than other comparator areas. The majority of these individuals get to work by private car, contributing to the problem of congestion. The Bicester Integrated

Transport and Land Use Study makes a number of recommendations for rectifying this problem – including highway and rail capacity enhancements. However, there is a need to ensure that sufficient employment opportunities are created within Bicester to reduce the need for travelling long distances to get to work. Clearly, the availability of suitable premises and employment land sites within Bicester to attract the types of businesses and investors that will create the employment that matches the skills and experiences of the resident population is important.

5.6.2 There are advanced plans to increase rail provision – both in the form of East West rail proposals (providing connections Oxford to Cambridge) and Chiltern Railways proposal (for an Oxford to London Marylebone service).

5.6.3 Realisation of motorway junction improvements is also a critical constraint and one that has a direct relationship with Business Park proposals. However, given increasing concerns for sustainability and the scale of planned housing provision, it seems unlikely that Bicester will continue to be able to meet car-based demand in full, and that stronger traffic management initiatives will be required.

5.7 Retail and Services

5.7.1 The recent retail study commissioned by Cherwell assesses future demand and concludes there is limited capacity for additional convenience floorspace in the Bicester town centre and that this capacity is likely to be taken up by extensions to existing stores or a new town-centre-format food store. It is also clear that forecast expenditure growth is sufficient to support a moderate increase in comparison goods floorspace in Bicester. This assessment does not take account of the additional growth arising from the South East Plan, nor the scope for linked trips with Bicester Village – particularly for convenience provision. Both of these factors strengthen the potential for the successful development of Bure Place and of possible additional developments.

5.7.2 The retail study also concludes that there is scope for significant increases in capacity for additional convenience floorspace in the Kidlington area though the population is likely to remain static. This capacity is likely to be taken up by extensions to existing stores or a new format food store. However, there is probably a lack of suitable sites to accommodate this growth. Forecast expenditure growth is sufficient to support a considerable increase in comparison goods floorspace in Kidlington, although again sites may be limited. There is also capacity for further provision of comparison floorspace, including retail warehousing in out-of-centre locations.

5.8 Conclusions

5.8.1 Bicester is on the cusp of change. Having been the recipient of significant housing-led growth and faced a growing imbalance between its infrastructure and employment offer, it is now in a position to address these issues. This includes a clear vision for the town, firm proposals for new employment space and for expansion of the town centre. The town will also benefit from committed upgrades to Chiltern Railways. The combination of these factors presents a unique opportunity for the town and represents a comprehensive strategy. The one limiting factor is potentially the need to upgrade the motorway junction to allow future development to proceed. This is included in a Highways Agency programme.

- 5.8.2 There is a significant risk that the Weston Otmoor proposal will undermine the emerging South East Plan and the Secretary of States proposed changes which suggest that additional employment land and housing north of Oxford could be detrimental to Bicester's future.
- 5.8.3 The overall potential of Bicester has however been temporarily set back by the impact of the 'credit crunch' on the economy. It now seems likely that the town centre expansion will be delayed; however, the case for additional retail space remains strong.
- 5.8.4 Kidlington does not have significant capacity for housing growth, but offers considerable potential for employment development, some of which is backed by the University of Oxford.

6 Population and Housing Impact of the Eco Town

6.1 Introduction

- 6.1.1 Parkridge has suggested that the proposed Eco Town, when fully completed, would provide housing for 15,000 households and an approximate population of 35,000 people. Some stakeholders consulted in this study have suggested that a population is more likely on the basis of 15,000 new households. A relevant consideration is the impact of providing 15,000 additional households and the relationships to existing planned development and the emerging RSS. The key questions are the extent to which the 15,000 households will be fully additional to the area, whether they will displace some or all of the planned provision in the local area, and the impact that this displacement may have on the surrounding area.
- 6.1.2 Discussions with Parkridge indicate that their intention is for housing (and therefore population) to be delivered over a 20-year period with around 500 to 1,000 dwellings delivered per annum, with the higher levels occurring towards the back end, once the town has been established. This implies an additional population of 1,000 – 2,000 people per annum.
- 6.1.3 Delivery of this level of housing is also highly significant in a wider Oxfordshire context as a whole, as housing completions have until recently averaged just over 2,000 per annum. For the Eco Town to be additional, this completions rate would need to increase.

6.2 Evidence of Build-out Rates

- 6.2.1 If Weston Otmoor goes ahead, the town developer will need to establish effective arrangements for carrying out development in a phased, tightly coordinated and strongly managed programme from start to completion. Working in close consultation with local authorities, the developer will be responsible, through his land controls, for securing the implementation of orderly and high quality development in accordance with a clear masterplan and vision for the whole development. This is a role which goes far beyond the traditional role of housing developers implementing Section 106 requirements, most particularly because the developer will also need to fund and/or construct all infrastructure required by the development and discharge responsibility for all related planning obligations (such as schools, affordable housing, public open space, highways and public transport). There are no real models of private sector-led development of this scale at present, but the creation of a successful model is clearly vital to success.
- 6.2.2 It is assumed that the developer may not necessarily carry out all housebuilding itself within the Eco Town but may also make sites available for development purposes for other housebuilders, as and when they are needed for completion of the development phase. To achieve success, the creation of value will need not to be at the expense of eco-credentials and overall design quality, the fulfilment of which will only occur with strong development management. To this end emphasis will need to be placed on:
- High quality of the built form;
 - Mechanisms for ensuring the vision is realised including development briefs, performance specifications, design coding and so on;
 - Realisation of eco elements;
 - Early realisation of infrastructure;
 - Involvement of partners;
 - An inclusive process of consultation and involvement in community assets;
 - Establishment of effective long term management arrangements; and
 - Innovative delivery packages for eco-friendly delivery for utilities and other services.

- 6.2.3 These elements are vital for success and the achievement of build-out at the rate proposed, although few detailed arrangements have been proposed to date to meet these requirements. The assessment of potential build-out rates requires therefore requires assuming that such elements will be in place.
- 6.2.4 The requirement to deliver high build-out rates will be driven by commercial requirements, particularly where infrastructure is provided up front. Parkridge has proposed a very ambitious programme of strategic infrastructure for the town, including commitments that far exceed what has proved possible to date at prototype Eco Towns with strong public-sector support such as Northstowe. This means that the cashflow profile of the development could be negative for a large number of years. This is not to suggest that these are not possible, but that realisation is likely to depend on good business planning, the achievement of land deals with current owners that match these requirements, and rapid build-out rates close to those proposed by Parkridge. The margin of viability is likely to be tight.
- 6.2.5 In terms of the relationship with existing planned developments such as around Bicester, it will of course be a concern to the developer that demand for housing and resources including construction capacity are not diverted to other competing strategic developments – the most desirable conditions being where there is limited competing development. This of course applies to competing developments in Bicester, although housing development in Bicester may have a competitive edge in that it does not necessarily face requirements for new infrastructure on quite the same scale. Evidence of these relationships is found most explicitly in developers concerns about competing schemes and in that, empirically, most of the schemes that have achieved high build-out rates have been in contexts where they were the main scheme and the development has been carefully planned and phased within the sub-region. At the various public examinations in the Cambridge sub-region, for example, developers have consistently argued that the success of new towns depend upon a policy focus on the scheme and discouragement of competitors. The counter argument of course is that ‘they would say that’.
- 6.2.6 Having put in place the required infrastructure up front, it is likely that the town developer would release serviced land in phases at a series of locations, meaning that as phases are released there would be 10 or more areas of start on sites. The general rule of thumb is that housebuilders may be relied on to construct some 50 dwellings per annum on any given site. On this basis 500 – 750 houses per annum in the early phases is potentially a reasonable maximum assumption, but one which also probably assumes the competitive advantages of the free tram and the early supply of a wide range of housing including affordable housing. It is judged that any higher build-out rates would require there not to be many or any competing developments within the sub-region.
- 6.2.7 In reality, there are few instances where development has been on the scale of the proposal in recent years, and very few have achieved this scale of development, except in peak years and in conditions where there are not significant competitors. Some examples are given below.
- Cambourne, a new settlement near Cambridge has generally achieved rates of around 350 houses per year, although 2003/4 did see over 600 units in a strong market and well after the town had been established.
 - Hampton near Peterborough in a weaker market has achieved up to 500 units.
 - The West Swindon development area, comparable in scale to Weston Otmoor, achieved 800 units per annum during the 1980s, and the northern development area subsequently achieved about 500 per year. The most recent phases peaked at over 900 units in 2004-5 but have subsequently fallen back.
 - Lower Earley near Reading was developed by the private sector between 1979 and 1988 at some 750 private-sector completions per annum.

- New development, such as the extensions at Stevenage, have also been predicated on substantial build-out rates.
- 6.2.8 There is, of course, the point that the average will be affected by the wider property cycle over a long period of, say, 20 years. The recent credit crunch has seen housebuilding fall to record lows. Historically the housing sector is very 'peaky', being the first to fall and the last to recover across the property cycle.
- 6.2.9 Milton Keynes provides the only example of significantly higher delivery rates as a fully established new regional scale settlement in terms of potential size and delivery rates. It has however acknowledged that this 'new settlement' was delivered in a different political and financial era and that it was on a much larger scale than Weston Otmoor.
- 6.2.10 Table 6.1 provides an indication of the annual average housing delivery rates achieved during the various development phases of Milton Keynes. Most notably, delivery rates were highest in the earlier phases of development, during which the city benefitted from its designation as a New Town through increased public investment funding and the advantages of being overseen by a Development Corporation which acted as both landowner and planning authority. Later phases of development have relied increasingly on the private sector – the effects of which are reflected in the lower housing delivery rates (Table 6.1).

Table 6.1 Annual Average Housing Delivery Rates in Milton Keynes

Timescale	No. of Dwellings		
	Housing delivery rate within Milton Keynes City	Housing delivery rate outside Milton Keynes City	Total
Milton Keynes Development Corporation Annual Average (from 1970)	1,994	N/A	1,994
Milton Keynes Development Corporation Annual Average (from 1981)	2,061	255	2,316
Post Milton Keynes Development Corporation Annual Average (post 1992)	1,422	130	1,551

Source: Milton Keynes Council, 2007

- 6.2.11 It is also judged worth considering wider experiences in more recent growth areas, such as Cambridge.
- 6.2.12 Cambridge lies within one of the four Government Growth Areas. Historically, development has been concentrated in the city itself, although significant urban extension growth is planned for the future. Delivery rates in these areas are not, however, expected to exceed 2,000 dwellings per annum, the highest being 1,720 dwellings, which is spread across five urban extension sites (Table 6.2).

Table 6.2 Actual and Projected Housing Completions in Cambridge

Location	Actual completions (No.)		Projected Housing Completions (No.)	
	1999-2003	2003-2007	2008-2012	2012-2016
Existing city	671	2,188	500	400
Urban extensions	-	-	3,407	4,620
Total	671	2,188	3,907	5,020

Source: Cambridge City Council Annual Monitoring Report 2007

6.2.13 Table 6.3 provides some example housing trajectories for other local authority areas located within the Government's Growth Areas. Anticipated annual housing delivery rates range from under 1,000 dwellings in Peterborough to nearly 3,000 in Luton, although delivery is evidently dependent on the size of the local authority area, availability of developable land, household and employment projections, Regional Spatial Strategy and other growth targets.

Table 6.3 Other Authority Trajectories

Local Authority	No. of Dwellings by Year						
	2008/9	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
Thurrock	1,095	1,697	1,558	1,062			
Peterborough	1,660	1,682	1,420	1,198	949	944	820
Bedford	1,127	1,377	1,359				
Milton Keynes & South Midlands (Bedford growth area)	1,082	1,332	1,314	1,323	1,160	1,110	1,045
Luton	1,580	2,823	2,603	2,011	2,186	1,597	1,221

Source: Annual Monitoring Reports - Luton 2006-7, Bedford 2006-7, Thurrock 2007, Peterborough 2007

6.2.14 The general conclusions to be drawn from this analysis are of the potential possibility of achieving implementation of Weston Otmoor over a 20-year period and of the high potential risks associated with this. The analysis also suggests that the scheme is likely to be in competition for market share with other proposals in the sub-region and very few districts even in strong growth areas are suggesting more than about 2,000 dwellings per annum.

6.3 Assessment of Impact

- 6.3.1 One of the major challenges in determining such impacts is that little is known about the nature or target markets for the proposed housing in Weston Otmoor. The relationship of population to employment is also critical because the availability of employment in the Eco Town, or within commuting distance, will play a major part in the attractiveness of the town. Bicester for example has proved popular as a residential location, not so much because it has offered employment opportunities but because it has offered good opportunities to commute to London, Oxford and the rest of Oxfordshire.
- 6.3.2 The analysis has suggested that Bicester has offered substantial capacity for new housing over the past 20 years or so and continues to do so. The supply context means that Cherwell is one of the more affordable parts of the south east. Locally there is not any evidence of pent up demand. While the emerging RSS suggests that the Cherwell minimum provision should be 670 dwellings per annum, and, on the basis of household projections, there is a requirement for 900 dwellings per annum, Cherwell's LDF Issues and Options paper suggests that there is substantial capacity to meet these or even higher dwelling requirements. Based on the analysis, the main shortfall comprises requirements for more affordable dwellings, as there is little evidence of any shortfall in the market provision and the provision of affordable housing has been relatively low.
- 6.3.3 The situation changes if the situation in Oxford City is taken into account, where affordability issues are much greater, despite proximity to places such as Bicester. This evidence suggests that a large extent of the affordability issue in Oxford is place-specific, which is perhaps unsurprising given the attractiveness of Oxford as a place to live.
- 6.3.4 Aside from affordable housing, given that there is no real evidence that housing supply in Cherwell has failed to meet normal market demand, the implication is that the case for the Eco Town is based on meeting wider regional housing requirements. It is judged that the success of the town in this role depends crucially on the ability of the town to provide access to employment opportunities within the town or through commuting and appealing to home seekers and investors at this wider scale.
- 6.3.5 Based on this context it is useful to consider the circumstances under which housing in Weston Otmoor would be additional and capable of increasing market demand, and the probabilities of each occurring. These are strongly inter-related, but individually would seem to include:
- 6.3.6 **Where the price of housing would be lower.** This assumption is based on traditional 'first principle' supply and demand considerations, where a fall in price would normally result in higher quantities being demanded. Such a fall in prices could be generated by an increase in housing supply. The extent to which any fall in prices would also cause some displacement would also depend on whether the lower prices would be specific to Weston Otmoor or general. In the former case population might be attracted to Weston Otmoor from more expensive neighbouring settlements. However, the provision of more affordable housing would also realise latent housing demand. Overall, conventional economic analysis would suggest that a fall in prices would increase overall demand.
- 6.3.7 **Where the Eco Town would be sufficiently attractive to attract population from a much wider area.** This could plausibly occur as a result of the attractiveness of the town's eco-credentials, the overall environmental quality or as a result of the employment offer. The latter point raises questions as to the validity of the employment offer which is discussed separately below.
- 6.3.8 **A strong relationship to Oxford.** A close relationship with Oxford might help the Eco Town absorb some of the growth and pent-up demand from Oxford. This might arise from the strength of the proposed transport connections.
- 6.3.9 **An attractive town for commuters, particularly to London.** The existence of good transport links by rail would make the town attractive to commuters, perhaps moving out from London or other high cost housing locations. The suggestion is

that Weston Otmoor could build on the role established by Bicester, but that the combination of factors such as the free tram service serving the station and the potentially better image would help grow this market.

- 6.3.10 In practice all of the above are very plausible considerations and would confirm some additionality. However, none is sufficiently independent of the current or potential Bicester offer to suggest full additionality. In particular in line with policy, additional supplies of affordable housing are likely to form part of the Bicester offer. Bicester has its own attractiveness as a historic market town and has some potential to develop links with Oxford. It is also difficult to differentiate commuting opportunities, given that the rail service will be upgraded whether or not the Eco Town goes ahead. As these features are similar, a key differentiator is the benefits of eco credentials and the extent to which an Eco Town appeals to a different market to Bicester because of the different lifestyle it may offer. This would certainly fit with the ambitions of the Eco Town initiative. There is some potential here for differentiation, but much does depend on how the developer exploits this through more detailed planning and the relationships to other defining factors such as relative affordability and employment and service facilities, as well as market conditions. It may also be the case that future development in Bicester may adopt eco-principles and be equally attractive, or that the established and historic nature of Bicester provides a counterbalance. The consultant team's general assumption is that the benefits of an Eco Town in this location can never generate sufficient additional demand to avoid displacement from Bicester.
- 6.3.11 A further consideration is the profile of the population. Parkridge's assumption is that the new population of the Eco Town is of a similar composition in terms of age and households with a concentration in the 25-44 age group (as in Bicester). If this is correct then it means that the Eco Town could be competing for the same population as Bicester.

6.4 Conclusions on Population Impact

- 6.4.1 Actual impact is difficult to estimate with accuracy because it will depend on market conditions, the quality of competing schemes and the success of eco elements in attracting additional population on a regional scale. These cannot be predicted with any accuracy, especially from the current market position. These factors will influence build-out rates as well as displacement. Taken in the context of the build-out rates of other developments, the scheme is ambitious even over a 20-year period and this may itself influence the viability of some of the eco-elements of the scheme.
- 6.4.2 On the balance of probabilities it is considered that there would be elements of both additionality and displacement, that is to say, the Eco Town would both create its own market and draw growth away from Bicester. It is unlikely to draw all growth, given Bicester's current success and improving image. It can reasonably be assumed that about half the planned housing growth in Bicester will be diverted to Weston Otmoor. It is more likely that if Weston Otmoor fails to achieve its market, this will be more likely to be reflected in slower build-out of the Eco Town, rather than additional displacement from Bicester. This is particularly the case because of the ambitious nature of the build-out rates for the Eco Town and the track record of Bicester in delivery.
- 6.4.3 There is also no reason to see why, as an established location with improving rail links, Bicester will not continue to be a competitive location. Bicester also has a significant pipeline permission for 1,585 homes in South West Bicester (for which outline consent was resolved conditionally back in January 2007). Based on the Cherwell issues and options paper of May 2007, the housing capacity of Bicester is potentially very significant, particularly if the MOD land is taken into consideration.

- 6.4.4 Ensuring the provision of affordable housing at least to the level suggested by policy is also important in mitigating displacement impacts. This is particularly the case as it is the most obvious gap in the current local market.
- 6.4.5 The additionality and displacement issue is also dependent on future planning policy and the extent to which, if it goes ahead, the Eco Town is 'internalised' in future policy provision and used to meet future targets; any additionality could then be lost.

7 Employment Impact

7.1 Introduction

7.1.1 The scale of employment space provision necessary to accommodate 15,000 jobs proposed as part of the Eco Town is substantial and would be similar to some of the largest and most successful business parks in the UK. The focus of this chapter is therefore on the basis and realism of these assumptions and the extent to which they can be achieved. The rest of the Chapter considers additionality and displacement, the potential for non B1 uses and the timing of employment in relation to housing provision.

7.2 Additionality, Displacement and Growth Scenarios

7.2.1 The indicative figures from Parkridge suggest that the balance of employment will be dominated by B1 uses with all the employment (excluding retail & leisure) being created by 2020. The suggested quantity of B1 space is approximately 2,400,000 sq. ft. Taken over a 20 year time period, this is equivalent to around 120,000 sq. ft. per annum. This can be compared with Experian forecasts for B1 type sectors which forecast an annual net additional requirement for B1 space in Oxfordshire in the order of 150,000 sq. ft. In this context, the proposed quantum of B1 is equivalent to 65% (on a jobs basis) of the total net increase in the B1 requirement for the whole of Oxfordshire between 2008 and 2026. The implication is that either the Eco Town is going to displace a very high proportion of growth from elsewhere in the county, or that the Eco Town will be a regional scale facility capable of creating and attracting additional new markets.

7.2.2 Experian forecasts (Table 7.1) suggest growth of 6,781 jobs in Cherwell and 39,557 jobs in Oxfordshire as a whole in the period 2008 to 2026. The projected growth sectors in Cherwell are Health, Business Services, Hotels & Catering, Other Services, and Retailing.

7.2.3 The Experian estimate for Cherwell is thus clearly less than half the expected 15,000 jobs in the Eco Town. A key question is the source of potential occupiers (both in terms of use class type and geographical market). The scale of forecast growth also suggests that, if successful new employment space is provided at the Eco Town, it could adversely impact on employment proposals Bicester and Kidlington, as employment sites in both are marginal.

7.2.4 The analysis implies that the Eco Town would have to not simply absorb the job growth in Cherwell District, but also displace jobs from elsewhere. In this case displacement means relocation of existing businesses and the diversion of growth from other locations. Displacement would necessarily put at strong risk employment proposals in Bicester. However, in addition, since there is realistically not sufficient growth forecast in Oxfordshire, the Eco Town would need to create its own market capable of attracting new demand and displacing existing occupiers from elsewhere.

Table 7.1: Projected Employment Growth in Cherwell and Oxfordshire by Sector, 2008-2026

	Change in Jobs 2008-2026 in Growing Sectors	
	Oxfordshire	Cherwell
Fuel Refining	69	0
Metals	365	386
Electrical & Optical Equipment	285	91
Wood & Wood Products	17	49
Paper, Printing & Publishing	756	191
Other Manufacturing	383	0
Retailing	3,706	1,277
Hotels & Catering	7,874	1,489
Transport	514	197
Communications	329	25
Banking & Insurance	1,032	0
Business Services	10,902	1,513
Other Financial and Business services	6,225	347
Public Admin. & Defence	429	172
Education	4,093	807
Health	8,115	1,642
Other	6,963	1,350
Total	52,057	9,536

Source: Experian forecasts

- 7.2.5 This raises the question of where jobs might be displaced from. It is likely that this would occur in the areas of strongest demand – presumably Oxford itself and South Oxfordshire for B1 and high-tech uses. In reality, as considered in the next subsection, this raises the question of whether the Eco Town would really be able to compete against these locations, which are already strong. Moreover, given the substantial capacity and established reputation of these other sites, it is also questionable whether the target of 15,000 is really realistic.
- 7.2.6 For distribution, displacement is likely to occur from less-well-located industrial locations (including Bicester) and areas where land is more expensive for these use types (such as south of Oxford). It is judged that the lack of alternative opportunities for large scale distribution in the M40 corridor, perhaps make this a more obvious employment opportunity, although not one that is necessarily desirable.
- 7.2.7 The scale of B1 floorspace proposed by Parkridge also implies that it could represent a business park of regional scale. Attraction of uses at this regional scale might reduce overall displacement effects locally. In considering the potential role of the employment floorspace at the Eco Town as a regional scale business park, a number of comparators can be considered.

Milton Business Park

Milton Business Park, located 12 miles from Oxford, near Abingdon can be considered a good comparator for the potential composition of business space at Weston Otmoor.

The 250-acre site hosts over 165 companies which employ around 6,500 people and has been developed from 1988 onwards. The size of the park is reflected in a wide variety of clients from a range of sectors including construction, distribution, design and print, financial services, telecoms, automotive, IT & technology and R&D and laboratory. The park is currently home to more than 30 science companies with over 500,000 sq. ft. of science and technology space. Its success is based on the strength of offer – of flexible and innovative space, on short leases – despite the park's location some distance from Oxford. However, spatially the park does benefit from closeness to Didcot and fast rail access to London.

MEPC, which runs Milton Park, has recently announced that it is increasing its support for entrepreneurial technology start-ups by launching a new, purpose-built Innovation Centre.

The Harwell Science and Innovation Campus

The Harwell Science and Innovation Campus is home to science- and technology-based innovation and enterprise including major national and international science projects and facilities. Over 4,500 people work on the campus in around 100 organisations. Covering some 260 hectares (640 acres), the Campus lies in an Area of Outstanding Natural Beauty in Oxfordshire near the ancient Ridgeway. With good access by road (A34/M4) and rail (Didcot Parkway), and within easy reach of the key regional centres of Oxford, Newbury and Reading, the site is well located for knowledge-based industry.

The campus was chosen as the location for the £350m Diamond Synchrotron, the largest UK-funded science facility to be built for over 30 years, this opened in 2007.

Its attractive location with good access to major transport infrastructure is a key part of its success. In 2000, approximately 65% of staff lived within 10 miles of the campus and another 20% within 11-20 miles,

Cambridge Science Park

Established by Trinity College in 1970, Cambridge Science Park is the UK's oldest and most prestigious science park. It is now home to over 100 companies and 1,650,000 sq ft of buildings. It continues to attract new businesses, from small start-ups and spin-outs to subsidiaries of multinational corporations.

The main industrial sectors represented at the park are Bio-medical, Computing & Comms, Consulting, Energy, Environmental, Finance and Business Services, Industrial Technologies and Materials.

Since 2002, the creation of new clusters has begun on the Cambridge Science Park, specifically in the areas of photonics, nanotechnology and materials science. In particular the strength of the photonics cluster is demonstrated by the arrival on the Park of Cambridge University's Centre of Molecular Materials for Photonics and Electronics (CMMPE) which opened in February 2003. The key to the park's success is its strong link to the University of Cambridge.

Cambourne Business Park Phase 1

The park has 50 acres offering up to 750,000 sq ft of advanced business space. As an international business centre, Cambridge has attracted an exceptional range and quality of R&D companies as well as many of the biggest names in IT, telecommunications and other corporate sectors. Just nine miles from the city

centre, Cambourne Business Park offers companies the scale and flexibility they need to grow in a Cambridge location.

Since development in 1999, it is now estimated that around 1,000 people work at the business park. Current occupants include Convergys Technology, Citrix Systems, Campbell and Regus Business Centres. Cambourne will eventually become home to around 10,000 people.

Unique to Cambridge, Cambourne's 'open' B1 planning consent means a development on this scale is possible, providing both office and R & D companies with the space they need. The Research Quarter will ultimately feature 3,000 sq m (320,000 sq ft) of the highest quality office and laboratory accommodation to be developed in three major phases.

Cambourne is planned to be an almost self-contained community incorporating all the amenities you would expect to find in a small market town.

- 7.2.8 These comparators provide examples of the level of spatial significance that the Eco Town employment space would potentially need to achieve. The scale of the proposed employment space is substantial, and it is therefore likely that a broad mix of employment uses could be established. In particular, Milton Business Park, one of the largest business parks in Europe, provides a good comparator.
- 7.2.9 Reference to comparators also highlights the issue of competition – there are other sites, which are arguably better located than the proposed Eco Town. These include land at Peartree, which is safeguarded in the Local Plan for employment uses. Oxford's Core Strategy Preferred Options Paper states that 'the land occupies a strategically important position at the northern edge of Oxford, and offers the opportunity for a high-quality development to create a landmark 'northern gateway' to the City'. This would represent competition within relatively close proximity (and crucially closer to Oxford) to the proposed Eco Town.
- 7.2.10 Business sites located to the south of Oxford could also represent strong competition, especially for more high-tech and knowledge based employment. For example, an area to the south of Oxford has been branded as Science Vale UK with the intention of building up further the base of high tech activity in the area. SEEDA chairs the Partnership. There is also the question of whether Bicester or Kidlington could offer anything of this nature. There are plans for Bicester Business Park. Construction of this is expected to commence in around three years time, although Parkridge has suggested this may not go ahead if the Eco Town goes forward. If the Bicester Business Park does go ahead it may have an advantage of being delivered ahead of the majority of business park space at the Eco Town. However, later the two could be in direct competition. The extent of this competition would clearly depend on how similar the floorspace composition of the two is, which is uncertain at this point in time.
- 7.2.11 It is also important to note that none of the comparators has achieved as fast a rate of employment development that is suggested for the Eco Town. This means that there must be severe doubts as to whether Parkridge's assumptions can be realised, particularly for specified uses. Alternative employment uses are considered in the next section.
- 7.2.12 It has been suggested that there may be scope to mitigate the potential impact on Bicester by requiring the Bicester business park to go ahead before employment land could be released in the Eco Town. However, the mechanism for achieving this is legally uncertain. Among other factors for example ownerships differ and it is not clear to us that a developer could be reasonably held to ransom for development of a site in a neighbouring town.

7.3 Non B1 Uses

- 7.3.1 As the section above has suggested the emphasis on B1 is ambitious, it is therefore relevant to consider the potential for other employment uses. The most realistic alternative would involve a higher proportion of B8 warehousing employment, and new town residents will in practice be more likely to find work in the expansion of retail and services generated through the population itself.
- 7.3.2 The proposed Eco Town site has good motorway access and is well positioned between London and Birmingham. The nature of the market in the area is also currently B8-orientated. Accordingly, it is possible that a more realistic composition of floorspace is likely to be dominated by B8 distribution uses with a smaller amount of B1. It has also been suggested that there is likely to be a larger amount of retail and services employment.
- 7.3.3 It should however be noted that Parkridge has emphatically denied any interest in large-scale B8 developments within the town. It would also clearly be open to the planning authority to put limits on the proportion of B8 space in the development.
- 7.3.4 Parkridge has suggested that there will be 3,000 retail and service jobs in the Eco Town, a figure which is a correct estimate. However, a population of 35,000 would be expected to generate in order of 7,000 to 8,000 local service jobs (mostly in health, education, retail, personal services, police fire, waste, construction, transport and some in town centre offices such as banks, estate agents etc.). Many of these jobs will be of a higher-order nature and could be expected to be located in a regional centre such as Oxford, especially the city centre, rather than the Eco Town.
- 7.3.5 The assumption that many of these service functions would go to Oxford reveals a limitation of developing another Bicester-sized market town, rather than perhaps consolidation of growth to create a larger centre, which could retain these higher order functions.
- 7.3.6 Taking these factors into account it is possible to produce a 'best guess' employment scenario which could represent an alternative, and it is judged a more realistic approach, particularly in the timescales suggested for employment development by Parkridge. This is shown in Table 7.2.

Table 7.2: Alternative Employment and Floorspace Estimates

	GFA (sq ft)	Density (sq.ft per job)	Jobs (No.)
B1 (office and R&D)	800,000	250	3,200
B2	520,000	500	1,040
B8	2,680,000	1,000	2,680
B-class uses: total	4,000,000		6,920
Retail & Leisure			7,000-8,000 (of which 3000 would be in the Eco Town)
Total			13,920 – 14,920

Source: Arup

- 7.3.7 As may be observed, the proportion of B1 uses is still substantial, and this scenario, as well as the developer's own, would still displace future employment opportunities in Bicester.

7.4 Timing of Employment and Housing Provision and Commuting

- 7.4.1 The objective of self-containment requires simultaneous phasing of housing and employment. If this is not the case, then there are risks that the town will develop

higher levels of out and in commuting. For example, if housing is available but not jobs, then out-commuting will be greater; if jobs, but not housing, are available, then there will be higher levels of in-commuting. Unlike the new towns of the past, it is not the case that homes and jobs will be relocated together to the Eco Town and it is unlikely that people will make the double move of homes and jobs in one go particularly where a house purchase is involved.

- 7.4.2 In reality it is many years since a 'self-contained' town was developed, and there is not much empirical evidence as to how the homes and jobs transfer would work. In the new towns of the past, there was often wholesale relocation of employment from centres such as London, and some even had qualifying conditions requiring residents to find a job before taking up residency. Some evidence is however available from Cambourne surveys.
- 7.4.3 Cambourne is a new settlement, which occupies a similar relationship to Cambridge as Weston Otmoor to Oxford. It also has a business park, which has been successful. Construction of Cambourne started in 1998 and the first dwellings were occupied in 1999. The most recent survey¹⁰ was conducted in July 2006 when the population of Cambourne was approximately 5,000 and the approximate number of occupied dwellings was 2,000. At the survey date, 78% of all adults living in Cambourne were working, full or part-time, 9% were retired and 2% were unemployed and seeking work. 66% of adults living in social rented housing were in work, whilst 86% of people who cannot work due to being permanently sick or disabled live in a social rented property.
- 7.4.4 In terms of commuting, just under 5% of employed adult residents of Cambourne work from home, 15% work in the town, 26% work in Cambridge and 34% work in the rest of South Cambridgeshire (Figure 7.1). A number of Cambourne residents commute within the East of England to Peterborough, Bedford, North Hertfordshire and Uttlesford districts. A smaller number also commute to many other districts in the region. However, commuting to the Suffolk coastal districts and to the south east of Cambridgeshire into Essex is very uncommon. For all occupations, the modal distance of travel to work is 10km-20km, the distance to Cambridge. By comparison, 60% of existing residents of the district travel less than 10km and the modal distance in the wider district is less than 2km. A commute of 10km-20km is the modal distance in all industry sectors, apart from the agriculture and energy sector where the modal category is various, i.e. no fixed place of work.

¹⁰ A Survey of Cambourne Residents July 2006. Prepared by the research group of Cambridgeshire CC

- 7.4.9 This means that in the early years the pattern of movement would be similar to that in Cambourne, with about 80% of the population commuting out for about the first 10 years. Even if employment uses developed rapidly, it would be unlikely that the requirements of these firms would match the skills of early residents, who would probably have an existing job. The most optimistic result would be a long term adjustment and settling down of residents and employees. More realistically, commuting is likely to remain high because the site would form part of a polycentric network of centres including Bicester, Kidlington, Oxford and London. The likelihood of high out-commuting also reinforces the need for very good quality public transport at an early stage of the development
- 7.4.10 The implication is also that the transport impacts could be very much more severe than is implied by the net commuting flows presented by Parkridge. If the Eco Town goes ahead, to mitigate these effects, the planning authorities may wish to condition the build-out of housing to the achievement of employment uses in the town and public transport or the. However, it would be difficult for any developer to agree to such a requirement because of the uncertainty of the market and may fail tests of reasonableness and impact on viability. A more reasonable arrangement might be to link the phasing of housing to the release of serviced sites or provision of buildings, rather than occupation thereof. As such arrangements have been generally resisted it is difficult to find examples where such arrangements have been successfully applied. However, the developers behind proposals at Ebbsfleet in Kent have agreed to a conditions related to the provision of social, community and retail facilities related to the phasing of housing. Developers behind proposals at Mereham, north of Cambridge, also appear to have agreed to the following condition, although this scheme was subsequent rejected following an appeal against refusal.

Mereham New Settlement – Extract from Proposed Conditions

Phasing of residential, retail and employment development

58. The construction of dwellings shall comply with the following restrictions:

d) No more than 500 dwellings shall be constructed until 4500 or more square metres gross of Class B1, Class B2 or Class B8 floorspace has been constructed on the site, and until 400 square metres gross or more of class A1, A2, A3, A4 and A5 floorspace has been constructed on site in units of 120 square metres gross or less in the area.

Note. A full copy of the conditions is appended to the Inspectors decision letter dated 28 August 2008

7.5 Relationship to the Economic Strategy

- 7.5.1 Much of this chapter has identified the adverse impacts of the employment proposals on Bicester. However, in terms of the Economic Development Strategy for Cherwell, the Eco Town could both help and hinder the achievement of targets for employment – on the one hand, generating a negative impact in terms of displacement, and on the other a potential positive impact, providing quality employment space and attracting larger scale employers that could be accessed by Bicester residents.
- 7.5.2 If the Eco Town proposal is successful, a number of potential benefits can be identified as set out below.
- There is the potential for the Eco Town to become part of Oxfordshire's branding, and in particular Oxford's brand in terms of an attractive location for businesses. By creating a place in which businesses (and potentially large scale headquarter type offices) want to locate the employment floorspace provided at the Eco Town could help to support and strengthen Oxfordshire's brand and increased economic growth in the County. It could also help to reduce constraints on growth arising from pressures on Oxford.

- The improved employment space offer and branding of the Eco Town may also result in bringing of one or more major anchor employers to the area that otherwise would not be attracted. Given its location closer to Oxford it could also build more on the success of Oxford and reduce commuting distances. Improvements to transport infrastructure could also add to overall public transport capacity. As well as reducing the potential for displacement of employment from locations such as Bicester, this may create new closer job and up-skilling opportunities for Bicester residents. It may also provide the opportunity for related companies to locate in Bicester.
- The provision of employment uses at the Eco Town could potentially provide an opportunity to widen the skills base in Bicester therefore having a positive impact for Bicester. In particular, if one or two large scale employers were secured (i.e. headquarter status offices), this may provide residents of the area with more opportunities for up-skilling locally than would otherwise be the case. Large company headquarters could provide more graduate level opportunities and access to the training and career development opportunities afforded by large organisations. Currently, residents in the area typically need to travel longer distances to access employers of this scale.
- In the early phases of the Eco Town, it is likely that new residents will travel to nearby settlements for retail and leisure facilities (as such facilities typically lag behind the delivery of new housing). This may provide a boost to centres such as Bicester and aid the incentive for some key schemes to be delivered in early years. Consequently, this could promote a period of strengthening in Bicester in the early years which would enable it to deal more effectively with the competition from the Eco Town.

7.5.3 It is important to note, however, that such positive impacts are very much predicated on the success of the town in attracting employment.

7.6 Conclusions

7.6.1 The assumptions made by Parkridge on employment are largely an 'act of faith', and that this area is fraught with uncertainty. The scale of employment proposed for the Eco Town is of a significant order – catering for approximately 15,000 jobs and without existing evidence of a business park which has achieved this level of growth in a 10- or 20- year timescale. The space will certainly have to be of a very high quality to achieve anything like this growth. The Eco Town employment offer is likely to be 'better' than Bicester's offer as it will comprise high quality sites and more modern stock with closer proximity to the motorway.

7.6.2 There is potential for a larger share of B2 and B8 uses than currently suggested in the proposals, although Parkridge has suggested that these uses would not be particularly sought or welcome.

7.6.3 Available evidence suggests that the employment component is likely to lag behind housing, meaning that the proportion of households out-commuting for work will be high for many years.

- 7.6.4 The employment provision will add to the stock of potential sites in Cherwell and as such is likely to support additional growth in the economy. However, given the scale of provision, either the development will proceed more slowly than planned, or, more likely, existing businesses will relocate to the higher quality space in the Eco Town and with displacement of growth in traditional centres such as Bicester.
- 7.6.5 In general, it is therefore expected that the employment space at the Eco Town will compete rather than complement provision at Bicester and Kidlington. The scale of growth envisaged at the Eco Town must mean that it will both absorb and displace growth.

8 Social and Community Impacts

8.1 Introduction

- 8.1.1 This final chapter considers social and community impacts. Oxfordshire County Council's guide on 'Infrastructure and Service Needs for New Development' states that, in general, there are no major areas of 'spare capacity' within the existing council services; and the earlier analysis of existing capacity for the identified social and community infrastructure did not identify any significant spare capacity. The assumption is that the Eco Town would need to provide its own social and community infrastructure services and facilities to support its own residential population. Further, it is assumed that the integration of such facilities would be integral to the Eco Town proposals in order to meet sustainability principles and reduce the need to travel.
- 8.1.2 It should be noted that, at the time this study was being undertaken, no detailed information was available with regards to the likely population profile for the Eco Town (with the exception of broad brush age group assumptions used for transport modelling purposes). The proposals for social and community facilities to be provided at Weston Otmoor were also only described in generic terms. The assessment of likely demand and impact of the proposed Eco Town was thus by necessity high level.
- 8.1.3 The discussion of social and community infrastructure requirements has been based on standards and guidance provided by relevant stakeholders where possible; and if the Eco Town proposal was to go ahead further refinement would be necessary to take account of detailed needs assessment and to account for service delivery practices. To create economies of scale and to help develop focal points, consideration may be given to the co-location of social infrastructure facilities, for example, combining health care and community centre in a single building. This has not been considered in this assessment.

8.2 Health and Well Being Services

- 8.2.1 The Eco Town proposal currently states that provision will be made for medical and health centres, which will be distributed around the site within 1,000m walking distance from residents. This information is not yet sufficiently detailed to assess, whether this provision is adequate. Thus, the assessment of the likely health care requirements in Weston Otmoor and the impact on existing services in nearby settlements was based on guidance provided by Oxfordshire PCT about the likely level of requirements. It should be noted the information provided by the PCT is subject to two caveats:
- The estimates have been made in the absence of detailed information about the likely characteristics of the Eco Town, and more detailed work is required if the proposal proceeds to the next stage; and
 - Opportunities in relation to sharing resources and joined-up working, for example, one-stop-shops, co-location and single points of access to services, have not been explored.
- 8.2.2 The proposed scale of development would generate demand for general practitioners and other primary care services. On the basis of the Oxfordshire GP typical patient list size, the PCT estimate that 17.5 Whole Time Equivalent (WTE) GPs will be required for a population of 35,000. This could be provided in one or two surgeries, with a total floorspace requirement of around 2,100 sq.m. This floorspace does not include provision for ancillary and complementary services, such as a dispensary or children's services. Other local services that will also need to be provided include: mental health, dental care, physiotherapy, specialist care and community nursing. These will all require additional floorspace over and above the estimate for the GP surgeries.
- 8.2.3 The Eco Town proposal is too small to support a stand-alone hospital, either a community or an acute hospital. Therefore, residents would need to use existing facilities in the wider area; and off-site contributions to existing services and

facilities will need to be considered. An existing business case has been established for the renewal of the Bicester community hospital. Demand generated by the new residents in the Eco Town is therefore not required to justify these improvements.

- 8.2.4 Oxfordshire PCT have advised that, due to the proximity to Bicester and the fact that Weston Otmoor would be of a similar size, there may be a destabilising effect on Bicester's local primary care services. The Eco Town would directly compete for investment in social, health and community services and infrastructure. The significant service infrastructure requirements at Weston Otmoor would need to be identified and secured, which may have significant implications for the development of new infrastructure already planned in Bicester. Overall, the PCT concludes that Weston Otmoor could be detrimental to the sustainability and vitality of Bicester in terms of its impact on health and well being services.
- 8.2.5 Weston Otmoor would also generate demand for the health and well being services provided by Oxfordshire County Council, including social services. Land or floorspace allocations would need to be made within Weston Otmoor for social and community infrastructure, including elderly day care, extra care housing, physical and learning disability day centres. Oxfordshire County Council has advised that the demand generated for older persons facilities is likely to reflect the following guidelines:
- 10% of over 65 year olds use day care facilities; and
 - 3.6% of over 65 year olds want extra care accommodation.
- 8.2.6 Given the County Council's strategy to provide services at home wherever possible, it will be necessary for facilities to be provided in accessible locations. It is understood that the overarching principle for the Eco Town is the creation of a central spine of activity, which will include community uses, served by a public transport network. This may meet this spatial requirement and would need to be further considered if the Eco Town progresses to the next stage. When the housing offer at Weston Otmoor is refined, there would be a need to consider the provision of extra care housing as well as housing for people with learning disabilities, mental health issues and physical disabilities. These would be key issues for detailed masterplanning and design.
- 8.2.7 It is assumed that the County Council would require the developer to provide social and community facilities on a scale that is commensurate with the need generated by the Eco Town and, therefore, there would be no net demand on existing infrastructure elsewhere within the District. The County council have advised that although existing facilities in Bicester and Kidlington do not have the capacity to cope with any additional requirements of the scale that Weston Otmoor would generate neither would the need for them diminish because of the proposed development since these services have to be provided locally.

8.3 Education Facilities and Children's Services

Educational Facilities

- 8.3.1 Ensuring that there is a high standard of educational facilities that provide equal access to opportunities for learning and training will play a key role in achieving a sustainable community at Weston Otmoor. Oxfordshire County Council has advised that the future need for new schools is planned on the basis of:
- Existing school capacity and the ability to expand existing schools within their sites, taking account of national space standards. When sufficient capacity neither exists nor can be created to meet pupil numbers in forecasts and/or the additional demands generated by specific development proposals, a new school would be required.
 - Pupil forecasts, which take account of planned housing growth; when specific housing proposals come forward as planning applications, Oxfordshire County Council produce pupil projections for the development using an in-house model. This is based upon: household surveys

throughout Oxfordshire, the proposed housing mix (i.e. the number of 1, 2, 3 and 4 bed dwellings etc.), the proposed tenure split (i.e. market and affordable housing) and the proposed phasing of delivery of the dwellings.

- Changing government guidance, for example, on class sizes, the future role of schools in the community which might impact on how existing capacity will be used in the future and the need to create new capacity (extended schools).
- Changing patterns of parental preference which impact on a school's popularity.

- 8.3.2 As discussed already, there is currently some spare capacity within existing Bicester and Kidlington schools; however, in Bicester in particular, this may be absorbed by the planned housing growth, such as the South West Bicester development. Thus, it assumed that educational facilities would need to be provided within the Eco Town at a commensurate level to fulfil the demand generated by the new residential population, particularly in relation to primary and secondary schools. This would need to reflect the likely population profile for Weston Otmoor. The provision of further education, including opportunities for adult education would also need to be considered. This could be provided within the secondary schools or other community facilities, or demand may be met by existing facilities within Bicester or the wider area.
- 8.3.3 The recommended walking distance from primary schools and secondary schools as set out in *Shaping Neighbourhoods (2003)*¹¹ states that 600m is an appropriate maximum walking distance for primary schools and 1,200m for secondary schools. This implies localised provision of schools within the neighbourhoods of the proposed Eco Town. The County Council thresholds for funding transport for pupils are much higher 3,200m for primary schools and 4,800m for secondary schools. The County Council advised that when these latter thresholds were set, it was presumed that these were the distances pupils could travel to school (on foot or bicycle) and take no account of current traffic conditions on local roads. However, the County Council has further advised that the lower thresholds are desirable if they inform the proximity of schools to housing as they should reduce the perceived 'need' to drive children to school in domestic cars. The current proposal identifies potential locations for primary and secondary schools, which are at 600m and 1,00m walking distances – these are within the suggested guidelines.
- 8.3.4 In terms of preferred size, the School Organisation Plan (2004) identified one and two forms of entry (FE) as the preferred options for primary schools, i.e. 210 and 420 primary places (excluding early years/foundation stage). Oxfordshire County Council has advised that where possible, the larger option is preferred as it offers greater economies of scale and internal flexibility. However, for secondary schools there is no clear Council preference as the solution will depend on local circumstances. Six forms of entry (900 11-16 places) plus sixth form is considered a viable size, while eight forms of entry (1,200 11-16 places) is likely to generate more viable sixth forms with a year 11 cohort of 240 rather than 180. Below six forms of entry, there is a danger of losing economies of scale and flexibility in terms of grouping children by ability.

¹¹ Barton, Grant and Guise (2003) *Shaping Neighbourhoods*

- 8.3.5 On the basis of the information supplied by Parkridge on housing type and the likely profile of delivery and tenures, the County Council has modelled the likely population and child yield. The outcomes of this modelling are:
- An overall population of 39,600;
 - A peak primary school population of 5,192 after eight years of occupancy at the identified build/ occupancy rate (excluding Foundation Stage 2 children); and
 - A peak secondary school population of 4,258 for 11-16 year olds and 5,267 including sixth formers.
- 8.3.6 On the basis of this modelling, this would suggest a need for 12 (420 place) primary schools and more than three (1,200 place) secondary schools to meet peak demand. The Eco Town would also generate demand for special school places. The Consultant's previous experience from work on new settlement schemes suggests that there would be a peak in demand in the short- to medium-term followed by a tailing-off in demand for schools places in the longer term. Thus planned provision in the longer term is likely to require fewer places and innovative approaches to catering for the peak demand may be required.
- 8.3.7 The current proposals suggest two secondary schools (providing in total 2,350 places) and up to eight primary schools (providing in total 3,300 places). If the Eco Town was to progress to the next stage, it would be necessary to undertake further detailed analysis of the likely demographic profile, in order to assess whether this provision would be sufficient for the long term population of Weston Otmoor and also to consider how to meet the need generated by the likely peak in demand in the short to medium term.
- 8.3.8 It has been assumed that the number of Eco Town residents that choose to send their children to an existing school in the wider area will approximately equal the number of parents in the wider area that choose to send their children to the educational establishments within the Eco Town. Thus, in the long term there is no net impact on the demand for primary and secondary school places within the wider area. However, post construction, there is likely to be direct competition for investment funds in the longer term.
- 8.3.9 The County Council has confirmed that on the assumption that the developer provides sufficient pupil places, the impact on Bicester's primary schools would likely to be minimal. However, there is less certainty as to the impact on Bicester's secondary schools. The proposed secondary schools for the Eco Town are unlikely to be in place by the time new secondary school age pupils appear in the Eco Town, which would put pressure on Bicester's secondary schools in the short to medium term. However, the County Council expects performance to improve in Bicester's secondary schools, which would suggest that they would be able to successfully 'compete' for pupils when the Eco Town schools are built.
- 8.3.10 The County Council is producing a developer's guide to schools provisions, which will deal with the various service requirements, types of study and information required prior to a site being deemed acceptable for offer and use a school site. This is due to be released at the end of 2008. If Weston Otmoor were to progress, it would need to consider these guidelines in refining the educational offer in the proposal.

Children's Services

- 8.3.11 The Eco Town proposal states that provision will be made for community facilities, however, provides no detail at this stage as to the nature of these facilities. The exact scope of facilities would need to be further detailed if the proposal progresses to the next stage.
- 8.3.12 Weston Otmoor would generate demand for additional investment in children's social care, (which includes activities such as referrals, assessments, child protection plans, care homes and care placements). The level of need generated would depend on the economic profile of the Eco Town residents, since with the exception of disability, most issues dealt with by social care exacerbated by poverty and multiple deprivation. In addition, Oxfordshire is a net importer of adopted children, who are typically found in the wealthier places in the county. If this pattern was to continue in Weston Otmoor this would also generate demand for additional social care, since many of these children can have complex needs due to early childhood experiences. Extra services would also be required to meet the needs of children with disabilities and to support care givers. The scale of this need would depend on the development of practical community support services, since families tend to only approach social care services if these support services are not well developed.
- 8.3.13 The Childcare Act 2006 requires the provision of integrated services for under 5's and their families. This includes health, early education and care, and family support services. Ideally these are provided under one roof but this is not always practically possible. A Children's Centre reach area is usually 800 children, although Oxfordshire has centres with larger and smaller numbers – most importantly, the centre needs to serve the needs of the local community, however that is defined, rather than creating artificial boundaries.
- 8.3.14 If Weston Otmoor is developed, reaching more children would have revenue implications and put pressure on existing services. Some additional community space to deliver services would almost certainly be needed. The scale of this would depend on the number of under 5s. Currently Weston Otmoor would fall within the Phase 3 Ambrosden area, which has a planned centre for 687 under 5s. The County Council advised that Brookside in Bicester has generous accommodation so may be able to accommodate the needs of increased families in Bicester provided additional revenue funding follows. However, generally new estates need community space to deliver services. Thus it is assumed that the Eco Town would need to make adequate provision within the settlement to meet the demand generated by the new residents. It is assumed that this would be negotiated if the development were to progress.
- 8.3.15 The Childcare Act 2006 requires the council to provide both sufficient early education and sufficient childcare. Early education provision for 3 and 4 year olds is now included within the Council's adopted primary school brief for all new developments. There is no pre-existing shortage of early education provision. Childcare for 3 -14years is now included in the primary and secondary school brief for all new developments. However there is a pre-existing shortage of out of school childcare and holiday provision. Childcare for birth to 3s is normally met by the private sector – discussion would need to happen as to how developers plan for this and incentivise childcare businesses to set up. There is a pre-existing shortage of provision, particularly for the youngest children. All of these requirements imply that space would need to be set aside for these uses if the scheme was to progress, since it is assumed that these needs would need to be met locally. As with all these community facilities, sufficient flexibility in the masterplanning process would need to be maintained in order to ensure that such facilities could be accommodated as required, for example, in conjunction with community centres of school buildings.

Adult Learning

- 8.3.16 It is assumed that the scale of the proposed Eco Town (35,000 to 40,000 residents) is such that there would be a need to provide an adult learning centre, since these typically serve a population of 50,000. Again, this would not necessarily be a dedicated space but these demands should be considered as part of any masterplanning.

8.4 Emergency Services

- 8.4.1 The Eco Town proposal currently makes no specific references to the provision of emergency services, however it is assumed that these would be included with the scope of community facilities and would thus further detail would be provided if the proposal progresses.
- 8.4.2 In common with other elements of social and community infrastructure, it is likely that local provision in terms of emergency service facilities will be required within the Eco Town commensurate with the demand generated by the new population and floorspace provision.
- 8.4.3 The University of West England/ Local Government Management Board (1994)¹² suggested that the threshold for a new police station or fire station was a population of 40,000. On the basis of this guideline and the fact that the end state population for Weston Otmoor is 35,000 to 40,000, it is assumed that one of each of these facilities is likely to be required.
- 8.4.4 Thames Valley Police have responded to recent consultations by Parkridge, and to the recent national consultation on Eco Towns, highlighting the need for Secure by Design and Police infrastructure to be provided for. Policing services operate at several levels - contact point, neighbourhood, small town/large village and main town etc.. Thames Valley Police have advised that the service does not use a pure population threshold 'ready reckoner' to quantify property requirements. However, they have confirmed that local provision would be required within the Eco Town if developed. In addition, there would also be a requirement for investment in additional custody facilities (particularly important given the current shortfall in the wider area); Bicester's existing police station to accommodate increased demand for services; and at the force-wide level to accommodate, for example, crime support, control room, forensics, roads policing, HQ support staff, evidence and other storage functions associated with a larger population. The Authority have advised that, at present, they have not considered in detail how they would address the impact of the Eco Town in terms of countywide and force wide functions such as road policing, crime support, intelligence, HQ support and custody etc., which would have a need for additional manpower generated by the development.
- 8.4.5 As discussed in Section 9.4, the Police Authority have estimated the likely need for additional manpower based on the planned growth for Cherwell over the period 2002 to 2026. On the basis of that information and using simplistic per person ratios, this would indicate that when fully built out Weston Otmoor would generate a need for:
- 83 new staff at district (local policing area) level;
 - 27 at county (basic command unit) level; and
 - 52 at force wide level.

¹² University of West England and the Local Government Management Board (1994) Sustainable Settlements: A Guide for Planners, Designers and Developers

- 8.4.6 However, it should be acknowledged that this is a very broad brush estimate at this stage and does not take account of, for example, economies of scale or that some of the planned growth in Cherwell may take place at Weston Otmoor instead of the wider district. These manpower estimates should not therefore be considered net additional but rather indicative of the likely scale of investment required.
- 8.4.7 The local sector inspector has advised that they would expect there to be a small police station in Weston Otmoor with front counter, response function, neighbourhood policing functions and possibly some of the wider functions. The siting of a custody facility within the Eco Town would also need to be considered. This could have a strategic function and serve Kidlington, Bicester and Weston Otmoor, and possibly remove pressure for Oxford.
- 8.4.8 Depending on the layout and form of the Eco Town, there may also be the need for one or two neighbourhood team bases to supplement the police station. These facilities are typically in around 125 to 225 sq.m. in size depending on a number of factors, including housing density and total population. These facilities would be typically located within local/district centres/hubs and may be combined with other facilities for service partners.
- 8.4.9 The Police Authority have advised that there are no likely sources of funding for additional service requirements generated by the building of Weston Otmoor. Therefore planning obligations would be critical. On the basis of the Policy Authority's calculation that police services costs £513 per dwelling, the associated developer contribution costs for the Eco Town are likely to be in the order of £7.7million.
- 8.4.10 Oxfordshire Fire Authority have also advised that they do not use a population threshold 'ready reckoner'. The County standard is 35 front line fire appliances serving a population of 650,000, which is equivalent to 18,600 people served by each fire engine or 24 fire stations serving the same population. On this basis, a 'rule of thumb' for a rural area with the equivalent of market towns with associated satellite villages and rural hinterlands, should be based on populations of around 25,000 to 30,000 per station. This would again suggest that a fire station would be required at Weston Otmoor. In practice, the scale of provision at Weston Otmoor would need to consider a range of factors, including:
- Population density - travel time is a key issue in determining service provision;
 - Infrastructure - road layout and likely congestion;
 - Demography - the intended population bas is key in determining risk; and
 - Non domestic risks associated with the 15,000 jobs which would be created by Weston Otmoor. The level of resultant risk is dependent upon the nature of industry and commerce present.
- 8.4.11 As clarity on these issues is not yet available, it is not possible to definitively determine risk and therefore potential protective (fire protection advice and regulation of standards) or responsive needs.
- 8.4.12 The Weston Otmoor site straddles the station grounds for two fire stations, Kidlington and Bicester. Oxfordshire Fire Authority have estimated that the remote location and assessed responsive workload of Weston Otmoor at the proposed scale would require, either:
- A change to duty systems and upgrading of Bicester Fire Station from the retained duty system to a staffed fire station 24 hours 7days per week across the year. The overall cost of this movement is assessed in the region of £1.5million per annum and a capital cost of £0.25million.
 - An on-site fire station at Weston Otmoor. The costs would be in the region of £3.0million capital and £1.5million per annum revenue.
- 8.4.13 One potential method of reducing the need for a responsive service would be the provision of domestic sprinklers and if the Eco Town were provided with mandatory

domestic and commercial sprinkler systems in all elements of the built environment the Fire and Rescue Service would re-examine its approach to responsive service provision. It should be noted that an uplift in service provision may still be required due to open air fires and other emergency incidents including road traffic collisions.

- 8.4.14 Any development of Weston Otmoor would increase the services proactive and responsive activities from both Kidlington and Bicester (and potentially other stations for larger incidents). The Fire Authority consider such an increase unwelcome as it will create a tipping point in service provision predominantly due to the remote location of the settlement from existing service delivery points. The favoured way in meeting this increased risk is the comprehensive provision of sprinklers and the policy of the Oxfordshire Fire and Rescue Service is to promote their use at all times.

8.5 Community Facilities

- 8.5.1 It is anticipated that the local need generated by the Eco Town will be serviced by the provision of facilities and services within Weston Otmoor. These will need to be agreed with local stakeholders and reflect the need generated by anticipated population profile. In order to create a sustainable community, these facilities should be located within the heart of the new community, and it is understood that the overarching principle for the Eco Town is the creation of a central spine of activity, which will include retail and community uses.
- 8.5.2 The proposal includes the development of local hubs around primary schools, providing small shops and services. Cherwell District Council have advised that they would typically expect a local centre to include: a convenience store (up to 5,000 sq.ft. sales area, with potentially another 1,000 sq.ft. back of shop area) and an additional three to five shops units, (approximately 1,000 sq.ft. each of sales area), such as take away, hairdresser, video rental, pharmacy and dry cleaners.
- 8.5.3 The proposed scale of development would generate demand for library services. Oxfordshire County Council has advised that a library would need to provide the equivalent floorspace of 23.sq.m. per 1,000 population, i.e. a total floorspace requirement of around 800 sq.m, to accommodate the required book stock of two volumes per person (with an associated cost of £700,000 at £10 per book). If the developer provided a single and centrally located library in Weston Otmoor, the County Council has indicated that there should be no impact on existing infrastructure elsewhere in the district. However, the County Council has also advised the current proposal (as outlined in the Final Bid Presentation, August 2008) would not meet the needs of residents since smaller libraries attached to schools would provide poor value for money, (in terms of costs per visit), and the limited services that could be offered from a series of small outlets would be inappropriate for the size of population. The County Council's previous experience suggests that the unit costs of providing small, rural or outer urban libraries can be 50% more expensive.
- 8.5.4 If the Eco Town was to progress, provision would need to be made for youth facilities. The current proposal suggests that schools should be the focus of community uses. However, the County Council has advised that schools can not be the only focus for such activity, since the use of school sites outside of schools hours, disadvantages key groups in the community including young people excluded from school, young people 16+ and young parents. Provision for youth facilities should also be made within residential localities, i.e. providing local 'places to go' in addition to specialist facilities in more central locations.

8.5.5 The exact form of community facilities would need to be directed by the County and District Councils, taking into account existing provision within surrounding settlements, requirements for long term maintenance, Council strategies for the provision of such facilities and possibilities for co-location of facilities. It is not anticipated that the provision of such facilities within the Eco Town would have an impact on surrounding settlements, since they tend to service localised need. However, if the Eco Town was to go ahead, it could help to establish a critical mass of population in the vicinity of Bicester, which may help define a business case for the provision of 'higher' order recreational and leisure facilities. These could be provided either at Weston Otmoor or Bicester. Although 'higher' order facilities may be justified, really higher order services, such as a theatre, are unlikely to be developed, since larger settlements, such as Oxford would still fulfil this role. The current Eco Town proposal discusses constraining the size and scope of facilities to meet local day to day needs. The interdependencies and patterns of movement for goods and services between Weston Otmoor and other surrounding settlements, such as Bicester and Oxford, are difficult to estimate in the absence of more detail about the Eco Town proposal.

8.6 Basic Requirements

8.6.1 Overall the following conclusions have been drawn:

- The provision of social and community infrastructure within Weston Otmoor would need to be commensurate with the demand created by the new residential population.
- Provision would need to be made for general practitioners and other primary care services, such as children's services, mental health care and community nursing.
- The scale of proposal is not sufficient to justify the provision of a new hospital, however, the additional demand generated by the increase population is likely to mean that the Bicester Community Hospital proposals will need to be reviewed.
- The scale and proximity of Weston Otmoor to Bicester may have a destabilising effect on Bicester's local primary care services, as it would directly compete for investment and may have implications for new infrastructure already planned for Bicester. Mitigation measures would need to be explored.
- Initial modelling undertaken by Oxfordshire County Council suggests that the child yield may be greater than currently assumed in Parkridge's early assumptions, therefore the education offer would need to be increased. There would be a need to plan for the likely short to medium term peak in demand for primary and secondary school places. In the long term, the provision of additional schools at Weston Otmoor could create direct competition for investment. Mitigation measures would need to be explored.
- Weston Otmoor would need to make provision for wider children's services, including social care, integrated services for under 5's, children's centres, early education and childcare. Sufficient provision and flexibility would need to be maintained within the masterplanning process in order to ensure that such facilities can be accommodated as required, for example, in conjunction with community centres or school buildings.

- Investment would be required to ensure adequate local provision for emergency services. Investment may also be needed to deliver services and facilities in the wider area associated with the demand generated by the additional population. Specifically an additional police station would be required; and either expansion of fire and rescue services at Bicester or an on site fire station at Weston Otmoor. The scale of investment required in fire services could be reduced through the installation of sprinklers across the development.
- As suggested in the Eco Town proposal, locating community facilities within the heart of the community would be important. The scale and nature of such facilities would need to be directed by the Council, other key stakeholders, service providers and the community. Long term maintenance costs would be an important consideration.
- The scale of development would not be sufficient to justify the provision of high order services; therefore it would be necessary for Weston Otmoor residents to travel to a higher order settlement to meet these requirements.
- Overall, at this stage in the process, it is difficult to assess how the Eco Town proposals might be enhanced or their impact mitigated given the lack of detailed information on community infrastructure provision. If Weston Otmoor progresses to the next stage, it will be imperative that detailed demographic forecasting is undertaken by the developer, since this will allow more meaningful discussions to take place as to the likely scale and nature of required services and facilities. Once a more precise proposal has been established, it would then be possible to explore how potential impacts on surrounding communities could be mitigated.
- Detailed discussions with service providers and the wider community would be essential to ensure that provision meets needs; addresses the quality and capacity of existing services and facilities in surrounding settlements; meets or exceeds policy requirements; fits with strategy aspirations; and takes account of service delivery practices. Such discussions with both providers and users are important to ensure that planned facilities are 'fit for purpose', build on lessons learnt and could help to foster links and with the existing community.

8.7 Conclusions

- 8.7.1 Many of the issues of social and community impact have yet to be resolved as they depend on detailed planning. Key issues that should be explored in any further stage of work include:
- Ensuring that sufficient social and community infrastructure would be provided to meet the needs of the new population, potentially in advance of actual demand.
 - The timing of delivery of social and community infrastructure. Early and co-ordinated provision of sufficient infrastructure in advance of new development through effective partnerships and coordinating investment timescales, rather than reactive 'retro-fitting', in order to ensure that sufficient services are delivered in the most sustainable locations.
 - Short- and medium-term provision of infrastructure. For example, it may be necessary to secure additional investment in an existing secondary school, until the critical mass of population in Weston Otmoor is sufficient to ensure the viability of such a facility.

- The need to provide facilities, which do not require standalone facilities, such as childcare, but would require a multi-purpose room in another planned facility, such as school or community centre. Sufficient flexibility would need to be maintained within the masterplanning process to ensure that such facilities can be accommodated as required.
- Co-location of facilities. For example, youth clubs could be provided as part of community centres or secondary schools; or community sports facilities could be provided at secondary schools. Where facilities or services are co-located, the specific requirements of each use would need to be considered. For example, in the event of co-location of youth clubs, separate access must be provided for youth facilities in order to ensure evening access, while if community sports facilities and secondary schools are co-located, additional land or floorspace requirements or need for separate access arrangements would need to be considered when estimating land requirements for the school facility.
- Opportunities to develop links and integrate the new community that would be created at Weston Otmoor and existing communities in the surrounding area.
- Initiatives that would help to build social capital and networks. This could, for example, include the provision of community space for leisure activities or sports. The formation of sport teams, which often happens relatively quickly in the creation of new communities, can be key to establishing internal (i.e. within the new community) and external (i.e. with the wider area) networks.

8.7.2 The future governance of Weston Otmoor, which could be key in determining the nature and scale of potential impacts. Who would govern Weston Otmoor? Would a new parish council be set up and how would this fit with the existing structure? Could a development trust be set up, which might be responsible for the ongoing delivery of services and maintenance? If so, would assets be transferred to the development trust to enable the future funding of these activities?

9 Overall Conclusions

9.1 General Conclusions

9.1.1 The housing and employment proposals at Weston Otmoor, in combination with existing plans, provide capacity for growth far in excess of existing anticipated demand in the local area. The strategy set out in the emerging South East Plan is to promote Bicester as a new location for higher value and knowledge based industries associated with the Oxford Cambridge Arc, and to reduce its dormitory function. Additional new employment development in Oxfordshire (including development in eco towns or north of Oxford) will need to ensure that it does not risk undermining these improved fortunes. Specifically, there is a significant risk that the Western Otmoor proposal will undermine the emerging South East Plan and the Secretary of State's proposed changes which suggest that additional employment land and housing on the northern edge of Oxford could be detrimental to Bicester's aspirations.

9.1.2 Although there is some scope for the Eco Town to help 'grow' the local economy and offer more housing, the consultants judge that the following outcomes are also likely if the Eco Town goes ahead:

- Although eco-credentials may generate some additional demand, existing activity and planned growth will need to be displaced to the Eco Town, displacing existing and planned future growth in Bicester and Kidlington.
- Bicester will fail to realise its vision and may be less sustainable as economic activities decline.
- The Eco Town will not necessarily develop in the timescales suggested by Parkridge.
- Employment growth is likely to lag behind housing growth and it will take many years before these balance.
- To achieve success the Eco Town will need to increase demand in the local housing market, for example by offering additional affordable housing.
- To be successful in employment terms the Eco Town will have to act as a regional scale facility, capable of attracting new growth from across the wider region.

9.2 Specific Conclusions

9.2.1 Other more specific conclusions supported by a range of evidence can be summarised as follows.

- Cherwell is one of the more affordable housing locations in the South East and has received substantial proportions of housing growth in recent years, notably at Bicester. There is no obvious evidence of under provision of housing in the area and, indeed, the existing pipeline of housing is large with a wide range of potential housing capacity evident in the LDF Issues and Options paper. The district is thus not an obvious location for further growth.
- Many of the economic drivers for the Eco Town, such as the commuting potential via Chiltern Railways, are shared with Bicester or with other locations in the Central Oxfordshire sub region: there are no obvious existing independent economic drivers for the Eco Town.
- Bicester has experienced rapid growth of population as a result of new housing and now needs to balance this growth with improved employment opportunities as well as better infrastructure and services. These

prospects have been delayed by the effects of global credit crunch on property markets, and would be threatened by the Eco Town.

- The implied trajectory of housing growth of the Eco Town together with existing planned growth in the district represent a more ambitious housing trajectory than has been achieved in stronger growth areas.
- Within a polycentric urban structure and without the mechanisms available to new towns in the past, it is difficult to see how the requisite level of self containment will be achieved. It is likely that employment will lag behind housing and it is unlikely that new residents will make the 'double move' of home and job within a short period. Even as jobs come available it is unlikely and would be entirely coincidental if resident skills and experience matched employment opportunities. This means that it is important that there is sufficient transport capacity to meet all these flows.
- The Eco Town would face considerable competition for large scale employment uses from the rest of the County, especially south of Oxford. It is not clear why the Eco Town would have a competitive advantage.

9.3 Wider Conclusions

9.3.1 Other conclusions that arise as a consequence of undertaking the study are as follows.

- It is not clear that Weston Otmoor is the only or best option for meeting additional growth objectives in this part of Oxfordshire.
- There is potentially substantial capacity for further growth of housing and employment in Bicester.
- Given the large upfront infrastructure costs it is important that the sensitivities of costs and build-out rates are tested upfront to mitigate the need for future compromises on infrastructure, employment and service provision.