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Oxfordshire Strategic Economic Plan

Overview of the Independent Economic Review and the evidence base underpinning the SEP

SQW

OxLEP driving economic growth

Contents

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1. The process of the Independent Economic Review

1.1 In January 2023, Oxfordshire Local Enterprise Partnership (OxLEP) commissioned SQW – working with Oxford Brookes Business School and glass.ai – to prepare a refreshed **Strategic Economic Plan (SEP)** for Oxfordshire. To support the development of the SEP, an **Independent Economic Review (IER)** for Oxfordshire was also launched.

1.2 Most economic strategies are founded on baseline evidence, but OxLEP and the consultancy team considered that a richer and broader approach was also needed, for three main reasons:

- First, while an evidence baseline will explain the shape of the local economy and its trajectory over time, an IER seeks to explain *why* change has happened and to identify where there are significant opportunities/challenges that are not necessarily visible in the standard datasets. **Preparing an IER therefore involves consultation and engagement, as well as a fresh look at data.**
- Second, an IER typically involves a focus on a limited number of themes which are of particular significance to the local economic context, generally following an initial scoping phase**. Rather than simply assembling data, the aim of an IER is to understand the dynamics of a local economy and the 'big picture' challenges and opportunities.**
- Third, **the *process* of an IER is just as important as the *product*** – it needs to be an inclusive exercise, drawing on inputs from a wide range of sources and ensuring that many different stakeholders are both 'listened to' and 'heard'.

1.3 In the context of Oxfordshire's SEP, an early scoping exercise identified four critical issues/questions for the county, each of which potentially has transformational and long-term implications:

- How do we **enable progression** within Oxfordshire and **achieve more inclusive economic growth**?
- How do we **advance Net Zero and sustainability** in shaping future economic growth?
- How do we **secure the future of the 'foundational economy'** within Oxfordshire?
- Recognising Oxfordshire's world class strengths, how do we **accelerate innovation and diffusion** – both within Oxfordshire and across the UK?

1.4 These issues/questions were configured into 'Deep Dives' – a focus for gathering data and insights – and they have played a key role in shaping the process of the IER.

1.5 The IER has subsequently involved:

- a **call for evidence** – which generated submissions from stakeholders across Oxfordshire and was structured to map onto the Deep Dives.
- **six workshops**, which were held in Spring 2023. These were well attended and the early workshops focused specifically on key areas of evidence in relation to each of the Deep Dives.
- **bilateral discussions**, focusing especially on the four Deep Dives.
- a broader **review of key evidence and literature**, in part structured by the Deep Dives, but also in relation to more general trends and drivers.

1.6 This process has led to various outputs, all of which have informed the Strategic Economic Plan. Some of these have been written up as stand-alone papers (see below). Others have been used in a cross-cutting way. The latter include, for example, a consideration of social, technological, economic, environmental and political trends and drivers which was used to inform, particularly, the second group of stakeholder workshops and has been important in ensuring a forward-facing vantage point throughout.

Table 1-1: Outputs from the IER

No.	Evidence Paper	Purpose
1	Call for Evidence Paper	• To provide an overview of the Call for Evidence process and the documents / responses that were received in relation to this.
2	Oxfordshire Economic Baseline	• To present a refreshed socio-economic evidence base for Oxfordshire, building upon the data presented in the *Economic Recovery Plan: Economic Baseline Assessment* (which was prepared in 2021).
3	Oxfordshire's Economic Projections	• To review the latest economic forecasts that have been delivered as part of recent exercises for Oxfordshire, including the Oxfordshire Growth Needs Assessment (OGNA) and the Housing and Economic Needs Assessment (HENA)[1].
4	Deep Dive 1: How do we enable progression within Oxfordshire and achieve more inclusive economic growth?	• To examine evidence on inclusive growth and opportunities for progression within Oxfordshire, and their importance to the county's economic sustainability and its prospects for the future.

[1] Note: No new projections have been undertaken as part of this work; it has relied on economic projections produced as part of the evidence base to support Local Planning Authorities in making decisions in relation to their individual Local Plans.

No.	Evidence Paper	Purpose
5	Deep Dive 2: How do we advance Net Zero and sustainability in shaping future economic growth?	• To examine Net Zero and sustainability within the Oxfordshire context, and the relationship of both to the county's economy.
6	Deep Dive 3: How do we secure the future of the 'foundational economy' within Oxfordshire?	• To define what we mean by the 'foundational economy'; to understand its significance locally; and to consider how it might evolve.
7	Deep Dive 4: Recognising Oxfordshire's world class strengths, how do we accelerate innovation and diffusion – both within Oxfordshire and across the UK?	• To examine Oxfordshire's innovation ecosystem and progress since the LIS; and to consider whether/how innovation and diffusion are taking place across Oxfordshire and beyond.
8	glass.ai Methodology Note	• To summarise the web-crawling activity undertaken by glass.ai and the headline results.
9	Workshop Report – Exploring Scenarios Workshop (April 2023)	• To summarise feedback from the second set of workshops[2] undertaken in April 2023.
10	Workshop Report – Strategy & Action Plan Workshop (June 2023)	• To summarise feedback from the third set of workshops undertaken in June 2023.
11	Organisations consulted in developing the Evidence Base & SEP	• A list of organisations who have supported the development of the SEP either by providing evidence, being a consultee, contributing to a workshop or providing feedback on the emerging SEP.

[2] Note: Stakeholder feedback from the first set of workshops (in relation to the Deep Dives) has been incorporated into the Deep Dive Reports.

2. Brief summary of the Evidence Base

2.1 This chapter summarises key findings and themes from six documents that have been prepared as part of the IER.

Oxfordshire Economic Baseline

2.2 The economic baseline provides a current view on Oxfordshire's economy, updating the evidence set out in the *Economic Recovery Plan: Economic Baseline Assessment* (prepared in 2021). Although macro-economic conditions have changed substantially (e.g. we are now in an inflationary environment and interest rates have increased), the key messages from the baseline data will be broadly familiar to stakeholders across Oxfordshire.

2.3 Oxfordshire's economy has grown steadily over the past decade; the number of jobs and people have grown at a rate slightly above the national average. However growth in productivity (as measured by GVA per hour worked) and the total number of businesses has been below the regional and national averages. Currently productivity in Oxfordshire is below national and regional averages and the gap has widened over the last decade. Over 2017-2020, productivity in Oxfordshire was £2 lower per hour worked and £4,330 lower per filled job than in England as a whole. If London is excluded, Oxfordshire's productivity levels rise above England's average; this 'solves a problem' in terms of numbers, but the underlying challenge arguably remains, particularly given the scale of Oxfordshire's assets.

2.4 Oxfordshire continues to have a strong skills profile and high levels of economic activity. However, Oxfordshire's labour force has changed considerably since the pandemic, both in terms of where people work, and who is working. The number of economically inactive people rose by 23,000 between March 2020 and March 2023. There is some evidence that this figure is now falling.

Oxfordshire's Economic Projections

2.5 The IER did not commission new economic projections as two sets of economic forecasts had been commissioned in Oxfordshire in the recent past. Projections are shaped by the underlying models and a further set of numbers would not have added a great deal of value.

2.6 The two sets of projections reviewed in this context were as follows:

- For the *Oxfordshire Growth Needs Assessment (OGNA)*, Cambridge Econometrics modelled three alternative economic trajectories to 2050: one based on a calculation of housing need, one based on Oxfordshire's historic trajectory, and one based on a 'transformational' trajectory along the lines of the aspirational scenario set out in the Oxfordshire LIS.

- These forecasts were reviewed by Cambridge Econometrics in the *Housing and Economic Needs Assessment (HENA)* commissioned by Oxford City Council and Cherwell District Council in 2022. The HENA took account of the population estimates from the 2021 census. It also considered the more negative macroeconomic outlook following Russia's invasion of Ukraine, the energy crisis, inflation and ongoing post-Covid supply chain disruption.

2.7 From both sources, there was expected to be employment growth in Oxfordshire under all scenarios. Over the next 20 years (2020-40), OGNA points to employment growth of between 50,209 and 102,835 jobs (0.6% to 1.1% compound annual growth rate (CAGR) respectively) across three growth scenarios (standard method, business as usual and transformational). The HENA forecasts point to a similar growth rate over two decades (2021-41), with jobs growth of between 57,870 and 88,630 jobs (0.7% to 1.0% CAGR respectively).

2.8 The key findings from the existing employment projections are that:

- compared to the historic jobs trend in Oxfordshire (CAGR of 1.0% over 2001-2021), the business as usual/baseline trend projections in both OGNA and HENA suggest slower rates of jobs growth over the next two decades
- the growth rate seen over the last two decades is projected to be achieved only under aspirational high-growth scenarios.

Deep Dive 1: How do we enable progression within Oxfordshire and achieve more inclusive economic growth?

2.9 Oxfordshire has a successful economy. Although this has led to high levels of wealth and income, the benefits have not been enjoyed by all residents. Oxfordshire has an unequal distribution of income and there are critical issues linked to housing affordability. Oxfordshire's recent economic strategies have all sought to address this challenge. In response, the Oxfordshire Inclusive Economy Partnership (OIEP) was formed to create 'a more equal and sustainable region' for all, bringing together stakeholders from across Oxfordshire to create the conditions for an inclusive economy.

2.10 Evidence in relation to Oxfordshire's current performance suggests a complex picture. On some indicators, Oxfordshire performs well: social mobility appears to be among the best in the UK (i.e. individuals born into poor backgrounds are more able to live more prosperous lives); skill levels across the county are strong; and there are partnerships, organisations and charities working to create routes to progression and a more inclusive economy. However, there still remain some challenges: the City of Oxford is the second most unequal city in the UK; there are major skills shortages, particularly in the foundational economy; and the lack of affordable housing supply means that Oxfordshire struggles to retain its graduates and foundational economy workforce, putting pressure on front-line services.

2.11 The appetite for change – including through the establishment of organisations such as the OIEP – is helping to create the conditions for a more inclusive economy. However more work is needed, and the ongoing cost-of-living crisis, combined with already high housing costs, is creating additional pressures on communities.

Deep Dive 2: How do we advance Net Zero and sustainability in shaping future economic growth?

2.12 Within Oxfordshire, all five City and District Councils and the County Council have net zero targets, and work has been undertaken to identify how these might be achieved. The Pathways to a Zero Carbon Oxfordshire (PAZCO) report details three key areas of focus: delivering a green recovery from the pandemic; raising investment and funding to drive the sustainability transition; and building an inclusive low-carbon economy which seeks to ensure that all of Oxfordshire's economy transitions in a way that benefits everyone, including those sectors that are typically not seen as 'green'.

2.13 In addition, the IER pointed to 'distinctive flavours' to Oxfordshire's transition towards a greener economy:

- **Innovation**: Oxfordshire is developing green technology and new initiatives/ideas to deliver a more sustainable economy. This includes two national energy systems demonstrators (Project LEO and the Energy Superhub) and the University of Oxford's work with The Energy Systems Accelerator (TESA).
- **Skills**: Oxfordshire's universities, colleges and training providers are playing an important role in relation to skills for a green economy. However, there are still skills gaps that need to be filled if Oxfordshire is to transition to net zero. This includes skills around retrofitting activity, engineering, and construction. There are also skills shortages linked to the natural environment, and a particular need for experienced biodiversity professionals.
- **Community approaches**: Pioneering schemes at Ray Valley Solar, Westmill Wind Farm, and Sandford Hydro Lock are changing the scale at which change happens in respect to energy generation. Schemes of this nature are able to raise different types of financial investment (such as community share offers), while building community support for large infrastructure projects.
- **Sustainable food and farming**: Around 75% of Oxfordshire's land area is under farmland; and agriculture itself contributes to carbon emissions. Moreover there is scope to produce more of Oxfordshire's food locally.
- **Natural capital and ecosystems services:** Work is underway locally to provide a statement of biodiversity priorities and identify which areas of Oxfordshire should be prioritised for different kinds of nature recovery actions. This links to the importance

more generally of both blue and green infrastructure. In addition – given growing interest from the business community – steps are being taken to explore the scope for innovative financing mechanisms linked to addressing both ecological and climate emergencies.

- **Clean and renewable energy**: Oxfordshire has strengths in solar energy and is currently contributing over 3% of the total UK photovoltaic capacity (over twice its share by population and land area[3]). There is an opportunity to expand solar provision; however, this will compete for land, which is a scarce and a highly contested resource in the county.[4]

Deep Dive 3: How do we secure the future of the 'foundational economy' within Oxfordshire?

2.14 While economic strategy has focused in recent years on Oxfordshire's science and innovation assets, these 'leading edge' industries account for a relatively small proportion of the county's overall employment and business stock. Much of Oxfordshire's economy is made up of services that cater for locally-generated demand, a set of activities that have been conceptualised as the 'foundational economy'. Deep Dive 3 drew on this concept to explore the scale and resilience of this wider economy. It noted that the foundational economy has a central role in ensuring quality of life and local sustainability (put simply, ensuring that places 'work', in having viable services and a good quality of life), and that it is vital to Oxfordshire's knowledge core, as a supplier of goods and services and in making the county an attractive investment proposition. This 'symbiotic' relationship is important to Oxfordshire's economy and should be reflected in the SEP.

2.15 The Deep Dive focused on three main aspects of the foundational economy. First, in respect of essential public services (especially health and social care), there are currently severe workforce pressures, as demand rises and public resources are constrained. There is evidence that these pressures are greater in Oxfordshire than elsewhere, given relatively high living costs and competition for workers from other sectors. However, there is innovation taking place to increase productivity within the sector and to develop a more diverse range of business models.

2.16 Second, in relation to the development of the 'social economy', the Deep Dive found indicators of high levels of 'social capital' in Oxfordshire (for example in the propensity to volunteer and a stock of socially-engaged anchor institutions). It also found evidence of increasing interest from employers in social and environmental sustainability, as a result of commercial imperatives and changing attitudes. Oxfordshire emerged as well-placed as a centre for 'socially responsible' business, although it was noted that more could be done to improve employers' recruitment and employment practices, especially at the lower-paid end of the labour market.

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[3] Sam Hampton, Lewis Knight, Hannah Scott, Hannah Budnitz, Gavin Killip, Scot Wheeler, Alison Smith and Nick Eyre Pathways to a Zero Carbon Oxfordshire, 2021, Available: https://www.eci.ox.ac.uk/publications/downloads/PazCo-final.pdf
[4] ibid

2.17 Third, the Deep Dive considered the scope for productivity growth in mainly private sector activities in the wider economy. It noted the evidence of significant innovation in sectors such as logistics, and highlighted the scope for technology adoption (recognising the barriers that SMEs often face). This could be a focus for future support for business within the SEP. Reflecting the relatively high levels of 'social capital' highlighted above, the Deep Dive also found evidence of strong private-sector networks across Oxfordshire, offering a platform for future supply chain development.

Deep Dive 4: Recognising Oxfordshire's world class strengths, how do we accelerate innovation and diffusion – both within Oxfordshire and across the UK?

2.18 All of Oxfordshire's recent strategies have had ambitions to develop further its innovation ecosystem; Oxfordshire's *Local Industrial Strategy (LIS)* – which was developed locally in response to the *Industrial Strategy White Paper (2017)* and published in 2019 – set out Oxfordshire's ambition to be a top three global innovation ecosystem by 2040.

2.19 The LIS identified six key themes that would need to be advanced to achieve this ambition and Deep Dive 4 considered progress in relation to these. The evidence suggested progress in relation to three of the themes identified and these now are – or are well on their way to becoming – genuinely world class: iconic brand; strong financing; and commercial culture. One consequence has been a rapid growth in the stock of high tech businesses[5] and associated employment[6] over recent years. While there is no room for complacency, Oxfordshire's innovation ecosystem appears to be in a strong position, including in relation to international benchmarks. Evidence of progress in relation to the other three themes (liveable place; keystone assets; and talent proposition) is less conclusive – albeit Oxfordshire is four years into the 21 year journey (from 2019-2040) set out in the LIS.

2.20 When the perspective is broadened away from the innovation ecosystem (in a narrow sense) to innovation and diffusion across Oxfordshire more generally – consistent with higher productivity and a more efficient economy (including in relation to all three of the other Deep Dives), this second group of themes becomes critical. In a sense, liveable place, keystone assets and talent proposition (or more simply, place, assets and people) are the 'transmission mechanisms' between Oxfordshire as a hub for world class science and technology, and the economy of Oxfordshire more broadly. In other words, they are, arguably, the 'connecting tissue'. In relation to these themes, there is more to be done. The SEP should continue to articulate Oxfordshire's response.

[5] On a narrow definition developed by Eurostat – it is estimated that numbers doubled between 2013 and 2021, to almost 3,000

[6] Knowledge intensive employment across Oxfordshire grew from about 16,000 jobs in 2011 to almost 29,000 in 2021, an increase of over 80% (based on data from BRES)

3. Reflections on the IER and the evidence base underpinning the SEP

Process

3.1 The process of the IER stimulated a good deal of engagement from stakeholders in Oxfordshire. All four of the Deep Dives were recognised to be important. They generated a rich discussion with inputs from many perspectives. They also avoided 'siloed' perspectives linked to conventional delivery themes (skills, business support, infrastructure, etc.); these themes certainly have a role to play, but they do not lend themselves to a synthesis of perspectives and insights.

3.2 The Deep Dives generated debate and reflection, and the associated output provided an important source of evidence in its own right. Inevitably these debates were rarely conclusive and sometimes they were stymied by a lack of hard evidence (which is where a discussion structured around conventional delivery themes would have been easier).

3.3 From the outset, it was recognised that the process of the Deep Dives might, in the end, generate a research agenda for Oxfordshire and one to which partners/stakeholders could return in due course. The IER helped to articulate critical questions for Oxfordshire but in some cases, there is more to be done in answering those questions comprehensively.

Evidence

3.4 Evidence is – almost by definition – a reflection of (at best) current circumstances; more often, it is an historic snapshot (although as a snapshot, it has been used to inform discussion and debate around key issues to the SEP). There is a risk of relying on the 'rear view mirror' to inform a forward strategy. The period since the LIS was prepared in 2019 has been very unusual; it has been dominated by 'black swan' events (the implications of the UK's departure from the EU, the pandemic, and the energy crisis linked to war in Ukraine). In combination, these have significantly affected the current socio-economic evidence base (in Oxfordshire and elsewhere). The latest Census data are, for example, from April 2021 (the midst of the pandemic). Whilst the Census is by far the most comprehensive and robust ONS datasource, Census 2021 captured socio-economic conditions at a very unusual moment and one that will inform a different narrative from that which actually characterises Oxfordshire today.

3.5 Our approach has been to gather evidence from a range of sources – through the call for evidence, through consultations and workshops, and through literature and secondary data – and to triangulate these different insights to form a robust view (i.e. essentially to test one set of observations against another(s)).

3.6 Overall, the evidence base generated in this way and underpinning the new SEP has been strong. In large part, it is the outcome of a mature and stable partnership across Oxfordshire. Over the last decade, OxLEP has generated a significant evidence base – as have all the local authorities and many other organisations, sometimes working together. Partners 'know' their place, and the volume and quality of evidence was such that it provided a solid foundation for the SEP, and one in which OxLEP and its partners should have confidence.

3.7 However Oxfordshire's economy is complex. In essence, the county has substantial assets but there are also significant pressures and the job of the SEP (and indeed the broader Vision for Sustainable Development articulated by the Future Oxfordshire Partnership) is to navigate the relationships between these and to do so in a forward looking way. In this context, the IER arguably pointed to areas where the evidence base could be developed further over the years ahead.

3.8 The evidence base is quite fragmented in respect of **the foundational economy** (Deep Dive 3) – which was also the Deep Dive that generated most interest from stakeholders involved in the IER. It attracted attention because it captured a core challenge for Oxfordshire: fundamentally, *how services which are critical to how the place functions and yet are synonymous with low pay employment might be sustained effectively in a very high cost setting*.

3.9 Some of the surrounding evidence-based challenges were a function of different definitions and interpretations. But the bigger issue was that we sought to consider the foundational economy 'as a whole'. While there are sectoral insights (e.g. in relation to health and social care or the visitor economy), we were attempting to look more holistically. This is complicated and difficult. Some sectors within the foundational economy are highly regulated in terms of supply and driven by demography in relation to demand; here, 'the market' cannot provide solutions at the scale of Oxfordshire and innovation is often challenging (as services are intrinsically people-based and regulatory considerations mean that 'buyers' or commissioners are extremely cautious). Other elements are market driven and influenced more directly by economic conditions. Both components need to be understood in relation to 'the rest' of the economy, and also in relation to place. There are 'micro' considerations that matter in this context too – e.g. the effectiveness of a local bus service may have a disproportionate influence on how well the foundational economy functions at a local level. There are also macro factors at play, not least in relation to labour markets – and for a long time, many jobs in the foundational economy were filled by international migrant workers.

3.10 Across the foundational economy, stakeholders understood the problems. However, measurement was complicated and the conceptual breadth of the foundational economy means that it can be quite challenging as a framework for analysis . *This is one area in which further work could be conducted across Oxfordshire and beyond as the SEP is delivered, perhaps using the foundational economy sub-divisions set out in the Deep Dive paper as a way of breaking down a complex element of the economy into manageable units of analysis.*

3.11 The pre-existing evidence base in relation to **inclusive growth and progression** was more extensive (Deep Dive 1). In part, this was because stakeholders across Oxfordshire have devoted significant attention to the surrounding issues through various partnerships. But it was also – arguably – because it has long been a concern nationally. There are therefore national metrics and methodologies which can be used to generate local insights (linked, for example, to the indices of deprivation) and local variants of national processes that are tasked with identifying priorities (e.g. (currently) through the Local Skills Improvement Plans sponsored by DfE). Inclusive growth and progression therefore have an 'infrastructure' in respect to evidence and strategy. Particularly through the European Structural and Investment Funds, they have had a similar 'infrastructure' in relation to delivery; although this has now been dismantled, the lessons from it (and the evidence associated with those lessons) continue to be important. In delivering the SEP, the challenge will be to ensure that these infrastructures are attuned to Oxfordshire's distinctive characteristics: the mix of urban and rural; the scale of population growth and churn; and – now – the close relationship to the foundational economy and the issues identified within it.

3.12 There are however evolving evidence-based issues that partners across Oxfordshire may also wish to address. For example, the IER pointed to concerns about affordability and inequality at a local level. In parallel, we identified evidence to suggest that districts in Oxfordshire are characterised by high levels of social mobility (when benchmarked in relation to other local authority districts nationwide). Can both of these observations be true? The answer, almost certainly, is 'yes' – Oxfordshire has the economic momentum to effect social mobility, but the extent to which individual people/families/communities/places benefit is a contingent consideration. At the area level, the inference is that appropriate forms of economic growth are necessary but not sufficient. Further investigation into these relationships could be very insightful. There are certainly deprived people/families/communities/places within Oxfordshire but – unlike in some other local economies – there are also mechanisms through which economic 'betterment' is possible and, at times, successful. *'What makes the difference' in this context is an important question and one which Oxfordshire's research community might wish to consider. It ought also to shape responses through the delivery of the SEP*.

3.13 Deep Dive 2 was concerned with **progress towards net zero carbon and wider considerations linked to sustainability**. It sought to consider a wide ranging agenda – possibly too big an agenda in the context of this exercise. Pathways to Net Zero Carbon Oxfordshire – to use the title of the influential study authored by the Environmental Change Institute at the University of Oxford – is literally about 'pathways' or mechanisms to effect a different set of outcomes. These range from behavioural shifts to technological changes. Some of these are intertwined with economic life in Oxfordshire and these relationships need to be investigated further. Again though they are complex. *They relate to the functioning of an economic 'system' and there are multiple feedback loops within it. Generating real time evidence and insight should be a priority looking ahead.* Through the IER, we developed some new perspectives – and the evidence gathered by glass.ai was helpful in terms of businesses' commitment to Net Zero. Evidence of this nature ought to be useful in ensuring that progress is monitored and sustained.

3.14 Deep Dive 4 met with a substantial body of evidence – some of it generated locally and some generated internationally as Oxfordshire excites interest in relation to global narratives linked to innovation ecosystems. The evidence base surrounding Deep Dive 4 was however quite varied. Some of it reflected the level of investor interest – whether from developers, from financial institutions or from UK government. The contrast here with more limited evidence surrounding the foundational economy is noteworthy.

3.15 However Deep Dive 4 struggled in relation to the critical concepts at the heart of the enquiry – **(wider) innovation and diffusion**. Here again, the perspective needed to be system-wide – *between* organisations rather than within them, and looking at *connections* through supply chains, labour markets and the adoption of novel tools, technologies and approaches.

3.16 *Across all of these strands, the need – looking ahead – is for a better understanding of interdependencies*. The link between the foundational economy and the innovation ecosystem is fascinating and critical but our understanding of it is currently quite limited. We observe the constraints and frustrations – Harwell Campus, for example, is unlikely to thrive if people can't get to it because of a shortage of bus drivers. But to what extent do these 'constraints and frustrations' actually *cause* pathways to change? For the moment at least, new investment into Harwell has not been deterred. On a different front, is it the case that a far greater commitment (which appears to be real) to diversity in the workforce can itself effect more inclusive growth and more opportunities for genuine progression? And is this in turn a route to social mobility within Oxfordshire?

3.17 These questions are complicated. One of the priority action areas identified in the SEP relates to the idea of 'living labs' across Oxfordshire. This ought to be interpreted in a broad sense and linked to an observatory function focused on evidence. Some of the key questions linked to evidence and insight (articulated above) ought to be explored through it. *There appears to be a significant commitment to collaboration across Oxfordshire – and some of the objectives supporting the Vision of the Future Oxfordshire Partnership are cast in precisely these terms. Much could be gained by extending this intent to future processes of evidence gathering, perhaps galvanised and orchestrated by the two universities*. The Independent Economic Review has effectively launched this process, but it needs now to be sustained and accelerated over the ten years of SEP delivery.

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