

To: Future Oxfordshire Partnership (formerly the Oxfordshire Growth Board)

Title of Report: Oxfordshire Infrastructure Strategy (OxIS)- Stage 1

Date: 25 January 2022

Report of: Paul Staines, Interim Head of Programme

Status: Open

Executive Summary and Purpose:

This report introduces the completed, updated first stage of the Oxfordshire Infrastructure Strategy (OxIS), which looks at the prioritisation of Oxfordshire's identified infrastructure needs to 2040. It asks the Future Oxfordshire Partnership to endorse stage one of OxIS and to recommend its adoption by relevant partners as part of their methodology for infrastructure assessment and prioritisation.

The report also introduces the Future Oxfordshire Partnership to some principles of development for OxIS Stage 2, which will support the Oxfordshire Plan 2050.

How this report contributes to the Oxfordshire Strategic Vision Outcomes:

The updated OxIS is cited within the Oxfordshire Strategic Vision as helping to support delivery of Good Growth. The needs-based assessment at the core of OxIS ensures that proposed infrastructure schemes can be reviewed based upon priorities that align to the Strategic Vision.

Recommendations:

1. That the Future Oxfordshire Partnership endorses the OxIS Stage 1 as the framework for prioritising Oxfordshire's strategic infrastructure priorities to 2040
2. That the Future Oxfordshire Partnership asks partner councils to consider using OxIS as part of their methodologies for assessing and prioritising future infrastructure requirements
3. That the Future Oxfordshire Partnership delegate any minor textual changes to the OxIS report prior to publication to the Future Oxfordshire Partnership Director.

Appendices:

- One- OxIS Consultation summary
- Two- OxIS Stage One Summary Report

Introduction

1. The original Oxfordshire Infrastructure Strategy (OxIS) was endorsed by the then Oxfordshire Growth Board in November 2017. It has helped secure significant investment for infrastructure in Oxfordshire, particularly for transport schemes being funded through the Oxfordshire Housing and Growth Deal (the Deal) and the Housing Infrastructure Fund (HIF).
2. A refresh of OxIS was a commitment in the Deal and offers an opportunity to update our infrastructure requirements to reflect submitted and approved local plans together with proposals identified by third party infrastructure providers such as utility companies and the Health Service Clinical Commissioning Group.
3. Importantly, the OxIS refresh also allows us to re-evaluate our infrastructure requirements in the context of the current priorities of the Partnership, enabling us for example to rank or prioritise them in the light of declared climate change emergencies and a wish to maximise environmental enhancements.
4. The outline scope of the OxIS update was presented and agreed by the then Growth Board in April 2020. This included:
 - A set of five key themes in which to consider infrastructure prioritisation/ investment- aligned to the Oxfordshire Strategic Vision
 - The arrangements for overseeing the delivery of the project, with agreement that the County Council would project manage, alongside consultants engaged to undertake technical work.
 - Agreement of the governance arrangements for the project with a key role for the Infrastructure Advisory subgroup.
 - Consultation with residents and stakeholders.
 - The need to ensure wide ranging engagement with key infrastructure providers such as the Clinical Commissioning Group, Utilities and Education.
 - The outline budget to undertake the consultancy technical work, drawn from the Growth Deal Capacity Fund.
5. The then Growth Board also agreed to split the project into two parts. The first is OxIS Stage One, which looks to 2040 with the key documents informing this stage being the submitted and adopted local plans and their associated documents, particularly the Infrastructure Delivery Plans.
6. The second stage, OxIS Stage 2, is planned to align with the Oxfordshire Plan 2050 and will provide an assessment of the strategic infrastructure requirements emanating from the conclusions of this Plan.
7. Following endorsement to the project scope, the process for procurement of consultants was undertaken in summer 2020, with City Science being successful and beginning work in Autumn 2020. Stage 1 of the OxIS update is now complete, with commencement of Stage 2 to align with the development of the Oxfordshire Plan.

OxIS Methodology

8. The main elements to stage 1 of OxIS are as follows:
 - An outline of the Oxfordshire spatial and place-based context, including showing those areas where new housing and employment is planned.
 - A summary of currently planned housing and employment as outlined in local plans in Oxfordshire -as well as surrounding areas- that could impact on Oxfordshire, and the consequent areas of focus for consideration of new infrastructure.
 - Identification and description of Oxfordshire's future infrastructure needs to 2040. This also shows the spatial impact of planned schemes, as well as where there are gaps in planned infrastructure both against identified needs and the themes identified as our priorities.
 - The development of a Multi-Criteria Assessment (MCA) framework for assessment of identified infrastructure schemes, detailed in the next section.
 - The appraisal and scoring of identified strategic infrastructure schemes - 271 in total - against the MCA and the grouping of these by areas of focus and by spatial impact.
 - An assessment of infrastructure funding issues and opportunities, including the outline funding 'gap'.
9. At the core of the refresh of OxIS is a re-examination of the method used to rank or prioritise infrastructure, the so called Multi Criteria Assessment or MCA.
10. The earlier version of OxIS had a well-developed MCA which the refresh could build upon. It was however a child of its time and no longer reflects the current priorities of Oxfordshire.
11. The new MCA has been developed to reflect these priorities. Amongst other things it places greater emphasis upon either maximising the benefits or, where necessary, minimising the climate and environmental impacts of the infrastructure. It is closely aligned to the Oxfordshire Vision previously endorsed by the then Growth Board and then approved by its partner councils
12. The revised MCA is built upon the five pillars or themes that the then Growth Board approved in April 2021, and these are.
 - Environment
 - Health
 - Place-making (updated to be place-shaping in the final report)
 - Productivity
 - Connectivity
13. Within these five pillars there are a further set of sub-categories against which infrastructure schemes are assessed, a total of 25 in all. The net effect of this is to allow a more connected, sophisticated and comprehensive understanding of the impacts and benefits of proposed infrastructure, beyond how it enables housing growth, and it marks a departure from the MCA in the previous OxIS which placed emphasis on enabling planned housing growth.

14. Having established this method, the summary report- at appendix two- then demonstrates how this is applied to the current infrastructure requirements of Oxfordshire.
15. In particular, a total score is given in the report for both how a proposed infrastructure scheme aligns with the needs-based appraisal under each of the five core themes, as well as a score for how far it aligns and supports delivery of planned housing and employment growth, allowing these two issues to be separated.
16. To ensure that this illustration of how OxIS would prioritise infrastructure is as current as possible, all partners were asked to ensure that the list of infrastructure projects was as up to date as it could be, with the understanding that these projects needed to be worked to at least an agreed level of detail such that there was sufficient scheme information necessary for correct assessment.
17. Where infrastructure projects are promoted by partners but had not yet reached the detail needed for assessment they are noted in the report as such. The opportunity is there to add these or other projects in the future, subject to the necessary information being available.
18. It is important to note that in endorsing OxIS, the Future Oxfordshire Partnership is not being asked to agree the infrastructure lists contained within it. The purpose of the project is to agree a common MCA method for infrastructure assessment, and it is this methodology for which endorsement is sought. To enable this the report offers an illustration - at a point in time- of what the current known infrastructure requirements of Oxfordshire would look like when this prioritisation methodology is applied. Inevitably this list of schemes will change over time.
19. Overall, OxIS Stage 1 provides a comprehensive and up to date assessment of current infrastructure needs in Oxfordshire, as well as giving an updated framework for prioritisation of identified strategic infrastructure schemes.
20. The project has not in itself generated new schemes but has drawn these together from other evidence-based documents in engagement with key partners. Importantly this process has shown that there are gaps in planned schemes against the themes identified. This is particularly the case for the environment and health-based themes.

Project governance arrangements.

21. OxIS Stage 1 has been progressed as a partnership project, recognising that all Future Oxfordshire Partnership members have an interest in ensuring that the planning and funding of strategic infrastructure is done in an effective and co-ordinated way. To enable this to happen, proper governance was put in place at the outset of the project including:
 - Establishing structured project management processes, including a dedicated project management resource from the County Council.
 - Setting up an officer project working group to oversee the projects delivery, with representatives from all Oxfordshire local authorities and the Local Enterprise Partnership (OxLEP).

- Supplying regular updates to the Growth Deal Programme Board and to the Executive Officer Group of the Future Oxfordshire Partnership.
- Ensuring that the Infrastructure Advisory Group had political oversight on OxIS progress.
- Procurement of specialist consultants, City Science, within a budget to undertake the technical project work.

Stakeholder engagement

22. To ensure that OxIS Stage 1 took a comprehensive approach to identification of infrastructure needs and schemes, it was recognised at the outset that wider engagement was needed to complete the work effectively. This was done in two stages:

- Winter 2020/21: Several themed workshops were set up with important infrastructure stakeholders, particularly those involved in infrastructure provision. This ensured that key policy, strategy, and planning documents were identified, as well as any strategic projects that could be put forward for appraisal.
- Summer 2021: A wider public/stakeholder engagement process on the draft Stage 1 reports was undertaken over 6 weeks, which ensured that everyone had the opportunity to feed back on the Stage 1 work. It has also enabled the Stage 1 report to be refined, as well as allowing more proposed strategic infrastructure schemes into the appraisal process, using evidence submitted as part of the engagement.

23. The consultation process utilised an interactive project map that enabled users to identify where infrastructure projects were and to see how they scored against the 5 themes of OxIS- so as to understand its relative priority. Feedback on this consultation method was overwhelmingly positive.

24. Overall, we received about 150 responses from individuals and organisations- the key messages were:

- Strong support for prioritising the environment in any infrastructure considerations, followed by health and place shaping.
- An emphasis on ensuring that OxIS supports the urgency of achieving net zero carbon ambitions.
- A wish to ensure that future infrastructure requirements recognise the changing ways of working post COVID-19.
- A request that the connectivity and interrelationship between infrastructure schemes be reflected in the MCA.

25. A table showing how OxIS relates to and has been altered in response to the consultation outcomes is contained in Appendix One.

Outcome of work undertaken for Stage 1

26. The outcome of the Stage 1 work is set out in two reports:

- Stage 1 Technical Report, Dec 2021: This gives full detail on the OxIS process, infrastructure context for all relevant areas, identification of future infrastructure needs, the method and outcome of the MCA for all

proposed infrastructure schemes. This is offered as a background document to this report

- Stage 1 Summary Report: Dec 2021: This gives an overview of the Stage 1 work, including key points from the full technical report. This is contained in appendix one of this report

Next Steps

27. The success of the OxIS Stage 1 project will be in its continued use by partners as a common assessment method for the infrastructure needs of Oxfordshire. For this reason, the Future Oxfordshire Partnership is asked to recommend to partner councils that they consider utilising OxIS as one basis for prioritisation of infrastructure requirements.

28. Following completion of Stage 1 of the project, the scope of OxIS Stage 2 will be further developed. The principles underpinning OxIS stage 2 are proposed to be:

- It will need to support the Oxon Plan 2050 Reg 19 consultation.
- It should assess infrastructure linkages with agreed planned growth to 2050.
- It should build upon other evidence-based work being undertaken for the Oxfordshire Plan that will help to identify priority infrastructure, for example the transport assessment and water cycle study.
- It should use the MCA developed in Stage 1 as the basis for infrastructure ranking, but review this in the context of any relevant policy and strategy updates.
- It should be developed in a collaborative way, following similar governance arrangements as Stage 1.

Financial Implications

29. The Stage 1 consultancy work undertaken by City Science has been funded from the Growth Deal Capacity Fund. It is planned that the Stage 2 work is also drawn from this fund, with the total costs expected to be within the originally agreed budget. The project has been managed by resources drawn from OCC and the Core Growth Deal Team

Legal Implications

30. There are no legal implications arising from the endorsement of OxIS Stage 1 by the partnership. OxIS is not a statutory document, and any of the proposed schemes included in the document would have their own decision-making and statutory processes to go through to enable delivery.

Conclusion

31. OxIS Stage 1 has allowed Oxfordshire to undertake a thorough and evidence-based assessment of current infrastructure needs in Oxfordshire in consideration of current policy and strategy, including the Oxfordshire Vision, as well as currently planned development to 2040 as set out in district local plans.

32. It has also used this needs assessment to appraise proposed infrastructure, including assessing how it links to delivery of proposed development at a more local level.
33. Finally, it provides a sound basis to further develop infrastructure planning across different sectors, including looking for relevant funding. It also helps identify where further work may be needed to support development of schemes that fit specified needs, especially where infrastructure scheme gaps have been identified against the agreed themes.

Background Papers

[Link to access Oxfordshire Infrastructure Strategy, \(OxIS\) Stage 1\(2021-2040\) Technical Report](#)

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Appendix One Summary of key consultation messages and responses

Key Message	OxIS Response
<p>Urgency of achieving Net Zero and questioned importance of a growth bonus score applied to schemes</p>	<ul style="list-style-type: none"> •Accounts for current adopted policy and strategy context, including Local Plans •Increased prominence of total needs-based score and strengthened emphasis of bonus nature of growth scores •Flexible scoring system allows decision-makers to rank scores by each of the six components depending on individual priorities
<p>Potential impact of changing ways of working post COVID-19 on infrastructure scheme investment e.g., transport</p>	<ul style="list-style-type: none"> •Where appropriate and known, relevant infrastructure needs from additional pressures (e.g., digital) accounted for. •Acknowledgment of long-term COVID-19 uncertainty in Stage 1 Report with potential to be re-visited in future (e.g., Stage 2 or future Stage 1 update)
<p>Desire for clearer link between Neighbourhood Plans and Local Plans.</p>	<ul style="list-style-type: none"> •Neighbourhood Plans less strategic in nature, hence lower priority •Prominence of Neighbourhood Plans strengthened in Stage 1 Report
<p>Concern that inter-reliance / dependency of schemes not reflected in Multi-Criteria Assessment.</p>	<ul style="list-style-type: none"> •Where appropriate, schemes amalgamated and altered to account for this •Dependencies already accounted for in deliverability appraisal of schemes