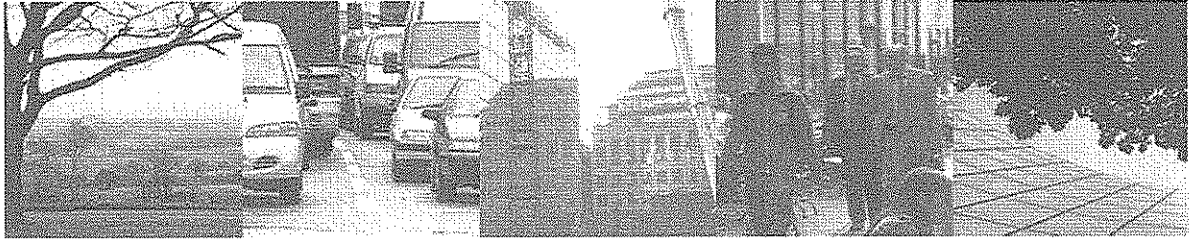


North Oxfordshire Consortium
HEYFORD PARK EMPLOYMENT STATEMENT



TYM & PARTNERS
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Report
August 2007

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- Appendix 1 - Cherwell District Commuting Data
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1 INTRODUCTION

- 1.1 Roger Tym and Partners have been asked by the North Oxfordshire Consortium (NOC) to provide a freestanding report to support their comprehensive planning application for development at the former RAF base at Upper Heyford, now called Heyford Park (the Site). This report deals with employment issues of the proposed development.

The Baseline

- 1.2 The Site is located north west of Bicester within the Astons and Heyford ward of Cherwell District (Cherwell). It covers a total area of 505 hectares. There are approximately 279,000 square metres of buildings on the site and over 280 units. Of these units, approximately 60 percent are currently occupied for employment uses.
- 1.3 There are more than 40 tenants currently employing over 900 employees at Heyford Park. The largest employer, QEK, occupies 34 percent of the total occupied floorspace and employs over 500 employees: 55 percent of the total employment on site. A breakdown of employment is provided in Table 1.1 below.

Table 1.1 Existing employment

Use Class	Sq.m		Employees	
A1	616	1%	2	0%
B1	3,098	4%	132	14%
B2	11,753	17%	113	12%
B8	47,466	67%	619	68%
D1	3,906	5%	33	4%
sui generis	4,262	6%	12	1%
Total B-space	62,316	88%	864	95%
Total	71,100	100%	911	100%

Source: NOC

- 1.4 The majority of employment on site is in B8 sectors of employment - over 68 percent. B1 employment accounts for over 14 percent of the current occupiers' employment.

The NOC Proposal

- 1.5 The NOC proposals for the Site, and their estimated employment implications, are summarised in Table 1.2 on the next page.

Table 1.2 NOC Proposal

NOC Proposal	Sq.M	Jobs
B1	15,658	655
B2/B8	100,406	794
Total B-space	116,064	1,449
Hotel/ Convention centre	4,020	14
Pub/restaurant	312	16
Heritage Centre	4,195	84
Retail	743	39
Nursery	224	4
Community Hall	580	12
Church	680	14
Non B-Space	10,754	183
Total B-Space and Non B-space	126,818	1,632

Source: NOC

- 1.6 The employment proposal put forward by the NOC is for the retention, refurbishment and re-use of 116,064 square metres of land and existing premises for B-space employment and 10,754 sq m for non B-space development. This will house a total of 1,449 B-space jobs and 183 non B-space jobs.
- 1.7 The proposal allocates 45 percent of the B-space employment to office, B1, uses. This is an increase from the baseline position where office employment accounts for approximately 14 percent, reflecting the aspirations of the Development Brief which has been prepared by Cherwell District Council (CDC). In terms of floorspace the NOC development proposal will provide an additional 12,560 sq m of office space.
- 1.8 In the NOC proposal, B2 and B8 employment will increase by 62 jobs or 8 percent from the baseline. On the other hand the NOC proposal is for a significantly higher absolute increase in B2/B8 floorspace of 100,406 sq metres compared to 59,219 sq metres in the baseline. A large proportion of B2 and B8 space is low density employment uses in existing land and premises on the site.
- 1.9 The NOC job figures are theoretical based on areas of the proposed employment uses on the site. In reality there is a natural churn in commercial and industrial property implying that at any one time some of the land and premises will be vacant. If we apply the Cherwell districts average vacancy rate of 6 percent¹ to the NOC proposal the total B-space employment on the site at any one time will be 616 B1 jobs and 734 B2/ B8 jobs, or 1,362 B-space jobs in total. This is 498 jobs more than the baseline B-space employment on the site - the majority being additional B1 employment to reflect the Brief and a marginal increase in B2/B8 employment.
- 1.10 The non B-space proposals are for facilities that are appropriate for the new settlement which will about 1,000 dwellings - a net addition of 700 dwellings. The non B-space jobs are localised jobs that will service the population at the new settlement as well as surrounding areas. The discussion in this report centres primarily on the B-space proposals.

¹ Based on the average vacancy rate in Cherwell District between 1999 and 2003. Source ODPM Commercial and Industrial Property Vacancy data, June 2005.

Objective

- 1.11 The objective of this report is two-fold:
- Firstly, we demonstrate that the NOC's proposals for a mixed use employment development comprising industrial and warehousing development as well as office development is aligned with policy and the needs of the local economy and the aspirations of the Development Brief;
 - Secondly we provide evidence on the need for more employment in the local area and wider district supporting the NOC employment proposals.

Defining the local area

- 1.12 When examining potential employment opportunities at Heyford Park, we cannot examine the area in isolation. As with any open economy, economic factors are not endogenous and are influenced by factors outside the local economy. The smaller the spatial unit of examination, the more we would expect external factors to influence the local economy.
- 1.13 It is also important to examine the wider area as CDC emphasises that employment at Heyford Park should not undermine employment at Banbury and Bicester.
- 1.14 For the purposes of this study we define the wider area as including²:
- The Astons and Heyfords ward
 - Caversfield ward
 - Ambrosden and Chesterton ward
 - Deddington ward

In the remainder of the report we refer to this as the "local area".

Report Structure

- 1.15 In the next section of the report we examine the guiding policies for employment developments at regional and local levels to demonstrate that the NOC employment proposals are aligned with policy.
- 1.16 Section 3 presents the local economic and employment needs within Cherwell and Heyford Park's local area. In Section 4 we analyse the employment projections and planned supply of employment land in the District.
- 1.17 Finally in Section 5 we summarise conclusions regarding the NOC proposals for employment at Heyford Park and the proposed mix of employment uses.

² CAS 2003 wards

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2 POLICY CONTEXT

Introduction

- 2.1 In this Section we review the guiding policy documents that provide the strategic direction for employment developments at the regional and local levels. The objective is to examine whether and how far the NOC proposals align with policy.

Regional Policy

- 2.2 The Draft South East Plan (March 2006) sets out the vision for the South East region. The Heyford Park site is covered by the general policies of the South East Plan and lies just outside the Central Oxfordshire sub-region.

- 2.3 Policy RE2 in the South East Plan provides the policy for employment and land provision:

"In the preparation of Local Development Documents, local authorities will assess the employment needs of the local economy and workforce. The assessments will take account of sub-regional strategies for the location, quantity and nature of employment land and premises. Policies should provide for a range of sites and premises based on the following criteria:

- o *Locations that are accessible to the existing and proposed labour supply*
- o *Efficient use of existing and underused sites and premises*
- o *Locations which intensify the use of existing sites*
- o *Focus on urban areas*
- o *Promotion of mixed use development where appropriate and subject to replacement of land and premises lost to non-employment uses*
- o *Locations that promote the use of public transport."*

- 2.4 The NOC proposals for Heyford Park contribute to the realisation of RE2 in the following ways:

- There is a high level of out-commuting from the surrounding area (see Table 3.3). The proposals will increase the number of local jobs for the existing and new labour force from the new settlement.
- The proposals, through a modest intensification of the use of the site, will improve the efficiency of its use.
- By the nature of the location, the proposals are not directly focused on urban areas, but since they provide for the continuation of uses requiring large areas of land and low employment densities, they support more efficient use of land in and adjoining urban areas.
- The NOC proposal for the Heyford Park site includes a mixed use development which includes B1, B2 and B8 space as well as non B-space.

Central Oxfordshire Sub-region

- 2.5 Heyford Park is not covered in any of the sub-regional policies of the Draft South East Plan. However the site borders the Central Oxfordshire sub-region which has implications for the site. Policy CO5 of the Draft SE Plan requires:

"Development for employment purposes should provide for the requirements of activities which contribute to regional and local priorities for economic development. This includes providing a range of accommodation for small businesses and innovation, skills development, business infrastructure and linkages within the knowledge based economy. Priority should be given to development which supports educational, scientific and technological sectors and

responds to the needs of established and emerging clusters within the county. The main locations for the provision of additional land for employment will be at Bicester and Didcot, in particular to provide for the expansion and relocation of existing local firms and those in the sectors referred to above" (Our emphasis).

- 2.6 The Central Oxfordshire sub-regional strategy focuses new employment in Bicester noting that:

"Bicester is well located for research activities needing strategic rail and road access, including to Oxford, and could benefit from East West Rail and contribute to wider economic development of the 'Oxford to Cambridge Arc'. To help make Bicester an attractive location for higher value sectors, a local economic and marketing strategy for Bicester focusing on business improvement (attracting inward investment and development) together with improvements of services and facilities, could be developed. The science and technology sector is often associated with a corridor of activity including Oxford to major employment sites in the south of the county. Being in the Oxford- Cambridge arc means Bicester being seen as part of Oxford area of influence, not outside it".

- 2.7 The location of Heyford Park outside the Central Oxfordshire sub-region has important implications for its development:

- Policy CO5 favours new employment developments in Bicester which is close to the Site. In particular the policy is to encourage knowledge based sectors in Bicester town centre and sees "less need to provide for activities such as warehousing and distribution." A district wide focus on the knowledge economy cannot realistically be to the complete exclusion warehousing and distribution. These are also activities that "contribute to regional and local priorities for economic development".
- As Policy CO5 gives a low priority to warehousing and distribution activities, there are important opportunities for neighbouring areas such as Heyford Park to benefit from such employment - and to meet a need.

- 2.8 In sum, Heyford Park's location outside the Central Oxfordshire sub-region means that it is not covered by the restrictions of Policy CO5, and is therefore an appropriate location for productive economic activities which that policy does not favour. Too much focus on the knowledge economy at the Site would compete with Bicester's efforts to "raise its game".

Oxfordshire Structure Plan

- 2.9 The Oxfordshire Structure Plan 2016 was adopted on 21st October 2005.
- 2.10 The County Council's key objective relating to Oxfordshire's economy as set out in the Report of the EIP Panel at paragraph 5.1 is:

"about building steadily on Oxfordshire's strengths and providing opportunities for local people, but not on a scale that encourages significant commuting into the area or which attracts large footloose firms or large warehousing and distribution facilities".

It is under this general policy of restraint that development proposals in the area must align strategically.

- Importantly, the NOC proposal is for a continuation of current B2/B8 activity and only a small scale of additional warehousing and distribution activities - only an 8 percent increase in B2/ B8 employment is proposed.

- The local area and district have high levels of out-commuting (see section 3); hence the development is not expected to encourage significant in-commuting rather to provide jobs for the growing local labour force.
- 2.11 Policy E1, reflecting the amendments drafted by the EIP Panel, is similar to the policies of the Draft RSS. In relation to developments for employment there are four key issues:
- “Development for employment purposes should be located so as to meet the objectives and priorities of this Plan. In particular it should:*
- *Provide for the requirements of activities which contribute to regional and local priorities for economic development. This includes providing a range of accommodation for small business and innovation, skills development, business infrastructure and linkages within the knowledge based economy;*
 - *Accord with policies for protecting the county’s important environmental assets;*
 - *Be located mainly in or adjoining urban areas or in existing concentrations of employment with good accessibility from residential areas, particularly by non-car modes of transport;*
 - *Not be of a scale or character that gives rise to large increases in commuting into the area or low intensity uses of land which generate heavy traffic on local roads.*
 - *Priority should be given to development which supports educational, scientific and technological sectors and responds to the needs of established and emerging clusters within the county”.*
- 2.12 Policy E3, which replaces draft Policy E2, reads as follows:
- “In the main towns of Banbury, Bicester, Didcot and Witney the provision of land for employment will be made:*
- *To achieve an appropriate balance between the number and type of jobs and the size and skills of the local workforce; and*
 - *To provide for the expansion and relocation of existing local firms and to accommodate firms which need to be located in the area, including provision to support the development of science based industries or other important business clusters.*
 - *A limited amount of land for employment will be made available in Abingdon, Carterton, Chipping Norton, Faringdon, Henley, Thame, Wallingford, Wantage and Grove.*
 - *In deciding on the amount of employment land available in the above towns, weight shall be given to the content of action plans that have been carried out following health checks and other processes. Where such plans show the need for additional land to maintain the vibrancy of market towns, then additional employment land shall be released.*
 - *Elsewhere the provision of land for employment generating uses will be restrained and limited to activities that do not give rise to excessive or inappropriate traffic.”*
- 2.13 Policies E1 and E3 set out the conditions under which development for employment should be permitted. However, Heyford Park is an existing employment area for which new housing and an increase in population is proposed, and it should be considered in this light. It meets local priorities in the following ways:
- It provides opportunities for new and growing businesses, particularly those which benefit from low rents.
 - As a formerly developed site, its use for employment puts no added pressure on the County’s environmental assets.
 - By housing labour and land extensive activities it reduces demand to locate these necessary activities on employment land in or adjoining urban areas. It therefore

supports the focus on the knowledge economy by facilitating the location of knowledge economy businesses in sustainable locations. Rather than competing with the nearest main town, Bicester, it complements it.

- NOC's proposals provide for a range of job opportunities to improve the residence/job balance in its surrounding area which is characterised by extensive out-commuting.
- Its current and proposed pattern of activities give rise to a relatively low level of traffic on local roads because to their low employment intensity.

2.14 We develop these points further in the following sections of the report.

Non-Statutory Local Plan

- 2.15 Policy EMPI of the Non-Statutory Cherwell Local Plan 2011 states that employment generating development will be permitted on the identified sites. The text of the Non-statutory Local Plan seeks to justify a 'broad balance' between jobs and working residents. The arguments for NOC's proposals that we put forward in relation to the Structure Plan apply to the Non-Statutory Local Plan. In Section 4 we examine the supply of employment land in Cherwell from the Plan.
- 2.16 The Council is currently developing the core strategy for the LDF - timetable: submission to secretary of state - May 2007; proposed date for adoption Sept 2008.

Comprehensive Planning Brief for RAF Upper Heyford

- 2.17 In March of 2007, Cherwell District Council adopted the Planning Brief for RAF Upper Heyford as a Supplementary Planning Document, following public consultation. With reference to employment the document proposes:
- A cap of 1,300 jobs on the site
 - A majority of B1 development on the site.
- 2.18 As regard to employment on the site the Brief provides the following guidance:
- "A range (our emphasis) of employment opportunities should be provided to meet the needs of the residents and the number should remain approximately in balance with the economically active population".*
- 2.19 The Brief then goes on to specify employment sectors that will be encouraged on the site in line with the Regional Economic Development Strategy, Cherwell's Economic Development strategy and Structure Plan policy E3, including:
- Science based industries and biomedical
 - High technology
 - Motor sports related
 - Business start ups and expansion of local firms
 - Home working.
- 2.20 We consider that the Planning Brief is not in alignment with other policies for the following reasons:
- The cap of 1,300 jobs on the site represents an increase of only 400 jobs over the current level. This fails to follow policy RE2 in that:
 - It fails to adequately exploit an existing location accessible to the labour supply in an area with heavy out-commuting (see Table 3.3). It would not be realistic to aim for a significant improvement in self-containment based on an area as small as the Site itself: we examine it in the context of a wider area in Section 3 below.

Heyford Park Employment Statement
Report

- It does go far enough in promoting intensification of use of an existing site, and the efficient use of an existing site.
 - As per Policy E3 of the Structural plan the aim must be to achieve an *appropriate balance*, between the future number jobs and the size of the workforce rather than an exact match as envisioned in the Brief . Furthermore, unmentioned in the Brief, this balance is not only about quantity, it is also about the quality of jobs - the number and *type* of jobs provided must be balanced with the size and *skills* of the local workforce.
 - Its specification of the sectors in Cherwell's EDS and Structure Plan Policy E3 undermines the focus on urban areas. In particular, it would compete with the economic development of Bicester, where Cherwell wishes to promote growth of knowledge-based sectors in an accessible location on the Oxford Cambridge Arc. It also fails to take account of the site's location outside the Central Oxfordshire Sub-region which is where Regional policy seeks knowledge-based growth.
 - While the NOC proposals are compatible with some 'high-tech' employment on the site, a concentration on employment in knowledge-based sectors would not meet the needs of the local workforce, not all of whom are highly skilled, and for whom, as the Brief itself states, a range of opportunities should be provided.
 - The Brief fails to acknowledge to advantages of the Site for B8 Storage and Distribution, advantages which are reflected in the current pattern of uses.
- 2.21 In sum, the proposals in the Planning Brief fail to make the best use of the opportunities presented by Heyford Park.



3 ECONOMIC AND EMPLOYMENT NEED

Introduction

- 3.1 The policy context in the previous section of this report shows that employment land policies in Cherwell and Heyford Park must generally be based around the needs of the local economy and the local labour force. In this Section we examine these needs in greater detail.
- 3.2 We examine the current economic structure of the local area as well as the wider District area. The objective is to review the scale and type of employment that is needed in the District and link this into the NOC proposals to examine whether and how these fit together.

The current economic context

Cherwell's Competitiveness

- 3.3 We have examined the socio-economic profile of Cherwell district - we will not go into great detail here as a full socio-economic chapter is provided in the Environmental statement. The Huggins Competitiveness index of 2005 summarises the important areas of Cherwell's economy and provides some interesting indicators of the economy.
- 3.4 The Huggins Competitiveness Index of 2005 is designed to benchmark UK regions' and localities' competitiveness. The data is based on a number of indicators and variables that are compiled to create the index. Table 3.1 below provides the key indicators and ranking of Cherwell District in 2005.
- 3.5 In general the district performs comparatively well - overall in the competitiveness index Cherwell is ranked 67th out of 434 UK districts - in the top 15% of all UK districts. The current ranking is an improvement from the ranking in 1997 when Cherwell District was ranked 80th out of 434 districts.

Table 3.1 Huggins Competitiveness indicators for Cherwell District, 2005

Indicator	Measure	UK/GB		Cherwell District			
		Value	Rank*	Value	Rank* 2005	Ranking % 2005	Rank 1997
Overall Competitiveness Ranking					67	15%	80
Employment Rate: Working Age People 2003- 2004 (Rank out of 432)	%	74.9		84.5	26	6%	3
Economic activity rate - working age 2003 (Rank out of 433)	%	78.2		86.3	34	8%	4
Claimant count as a Proportion of resident working age population estimates 2004	%	2.375		0.975	52	12%	35
Business Start-Ups 2003	per 1,000 Inhabitants	3.2		4.3	61	14%	145
GVA per capita 2002	£	£15,614		£18,032	65	15%	54
% with NVQ4+ - working age Mar 2003-Feb 2004 (Rank out of 420)	%	25.1		29.3	103	25%	214
Proportion of Knowledge-Based Business** 2003 (Rank out of 408)	% of Total Business	21%		22%	106	26%	104
Business Density 2003	per 1,000 Inhabitants	30.4		38.0	120	28%	153
Gross weekly pay - Workplace Based Full Time 2003 (Rank out of 433)	£	£462		£465	124	29%	138

*Rank out of 434 unless otherwise stated

** Based on OECD definition of knowledge based business sectors
Source: Huggins Index 2005

- 3.6 Some general conclusions can be drawn regarding the competitive advantage of Cherwell District:
- Firstly, the key competitive strength of the District is in the proportion of the working aged population who are in work as indicated by high employment rates, high economic activity rates and low claimant counts. The District is amongst the top 8% of all UK districts on the former two indicators which shows a strong economy.
 - The table also presents some areas of relative weakness in Cherwell including lower rankings for workplace wages, business density, proportions of knowledge based businesses and numbers of workers with high skills.
 - However, there have been significant improvements in Cherwell's knowledge based economy as indicated in the improvements in rankings since 1997 for workplace wages, business density, and workers with high skills³.
 - The current strength of the district i.e. the working aged population in employment is declining in relative terms as show in the indicators in the top half of Table 3.1. Since 1997 the District's rank in employment rates, economic activity rates and claimant counts has dropped significantly.
- 3.7 We draw an important conclusion from the above competitiveness data - that is Cherwell has a large economically active population, who are working but not necessarily working in the highest skilled, "high tech" sectors. Nevertheless they are important contributors to the competitiveness of the District. This section of the work force must be included in the strategic planning of the District's future if the District is to maintain its relatively strong economic position.

Now we look in greater detail at CDC's and the local area's labour force and the potential needs of the workers, currently and in the future.

Cherwell and the Local Area's Labour force

Economic Activity

- 3.8 The competitiveness data indicates that a key strength of Cherwell's economy is in the proportion of economically active population. Table 3.2 shows economic activity and qualification levels in the national, regional and local contexts based on Census 2001 data⁴. This shows that the local area has a relatively high economically active population (78% of the total population). This sits comfortably above the comparable figures for Cherwell District (75%), Oxfordshire (71%) and national (67%) rates.

³ The district's rank in the indicator of the proportions of knowledge based businesses declined slightly in 2005 index compared to the 1997 index, but this is a marginal change

⁴ Ward level data is only available from the 2001 Census data. The ONS annual population survey provides economic activity data at district and regional level which indicates that Cherwell continues to have a high proportion of economically active: 87.6% compare with 82.2% in the SE region at 78.4% in Great Britain.

Table 3.2 Economic Activity and Qualification levels⁵

	Economically active population		Economically active and skill levels as a proportion of working population in that skill category		
	No.	%*	% with no skills	% with low skills	% with high skills
England & Wales	25,022,200	67%	48%	76%	80%
South East	4,037,600	70%	52%	77%	80%
Oxfordshire	316,800	71%	57%	75%	79%
Cherwell	72,200	75%	59%	83%	84%
Heyford Park's Local Area	7,600	78%	63%	82%	84%

*% of working age population

Source: Census 2001

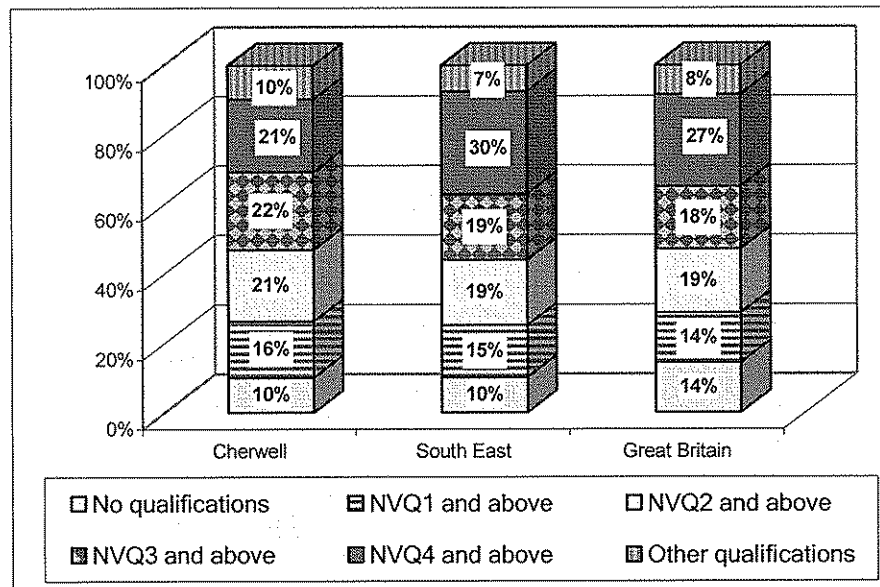
- 3.9 Table 3.2 also shows the proportions of economically active people in the area and their skill levels. The proportion of people with no and low skills who are economically active is significantly higher in Cherwell District and the local area than nationally and regionally. This confirms the issues highlighted within the competitiveness discussion above.
- 3.10 The District and Heyford Park's local area have an advantage in the number of people who are economically active and in particular the number low skilled people and people with no skills who are economically active. This section of the labour force is a key strength of the economy and must be included in the strategic planning for the District which will mean providing the necessary jobs for these workers. Such jobs will include B2 and B8 employment.
- 3.11 We will look at the current mix of employment in the area to draw further conclusions on this matter later in this section.

Qualifications

- 3.12 The latest information on qualifications is provided in the annual population survey set out in Figure 3.1 below. This shows that Cherwell has a lower proportion of highly skilled (NVQ4 and above) population (21%) compared to the regional (30%) and national averages (27%). On the other hand the District has a higher proportion with lower level qualifications (NVQ 1-3), 59 percent, compared with the regional average of 53 percent and the national average of 51 percent.

⁵ The term 'no qualifications' describes people without any academic, vocational or professional qualifications. The term 'lower level' qualifications is used to describe qualifications equivalent to levels 1 to 3 of the National Key Learning Targets (i.e. GCSE's O levels, A levels, NVQ levels 1-3). The term 'Higher level' refers to qualifications of levels 4 and above (i.e. first degrees, higher degrees, NVQ levels 4 and 5, HND, HNC and certain professional qualifications).

Figure 3.1 Qualifications, 2004



Source: Nomis area summary, Annual Population Survey

- 3.13 Again, the data above suggests that Cherwell has a larger than average proportion of the working age population with some but not high level skills. They make up a large section of the District's population and in line with policy their employment needs should be catered for.

Travel to work

- 3.14 The Census of 2001 provides travel to work data for workers and residents at the ward level. Table 3.3 below presents the commuting data for the local area. The table shows:
- Over 2,600 people live and work in the local area, this equates to 35 percent of all residents or 44 percent of all workers. A recent housing needs survey of the residents at Heyford Park showed that 21 percent of the residents worked on site.⁶
 - There are a higher number of workers living in the local area compared to jobs in the local area - there are about 20 percent fewer jobs than workers.
 - The main external employment centres for residents of the Heyford Park local area are Bicester⁷, Oxford and Banbury⁸ - in that order: there is a bias towards out-commuting to the south. In total 62 percent of residents work within Cherwell.
 - The main areas from which workers commute into the local area include Bicester, South Northamptonshire, Banbury and rural Cherwell⁹. In total 74 percent of the workers reside in Cherwell District.

⁶ May 2007, "Housing Needs Questionnaire" Camargue

⁷ Bicester is defined as wards including Bicester East ward, Bicester North ward, Bicester Town ward, Bicester South ward and Launton ward.

⁸ Banbury is defined as wards including Banbury Calthorpe, Banbury Easington, Banbury Grimsbury and Castle, Banbury Hardwick, Banbury Neithrop and Banbury Ruscote

⁹ All wards outside Heyford Park local area, and Bicester, Banbury and Kidlington town centres

Table 3.3 Commuting to and from Heyford Park's Local Area

Live in the Local Area, work in:			Work in the Local Area, live in:		
Total	7,610	100%	Total	6,070	100%
The Local Area*	2,650	35%	The Local Area*	2,650	44%
Bicester*	1,020	13%	Bicester*	1,160	19%
Oxford	840	11%	South Northamptonshire	370	6%
Banbury*	560	7%	Rural Cherwell	310	5%
Rural Cherwell*	380	5%	Banbury*	310	5%
South Northamptonshire	310	4%	Aylesbury Vale	210	3%
West Oxfordshire	280	4%	West Oxfordshire	200	3%
London	260	3%	Oxford	80	1%
Vale of White Horse	220	3%	Vale of White Horse	70	1%
Aylesbury Vale	150	2%	South Oxfordshire	60	1%
Kidlington*	140	2%	Kidlington*	50	1%
South Oxfordshire	110	1%	London	40	1%
Wycombe	70	1%	Northampton	30	0%
Milton Keynes	60	1%	Stratford-on-Avon	30	0%
Other	580	8%	Other	530	9%

*ward based definition

Source: Census 2001

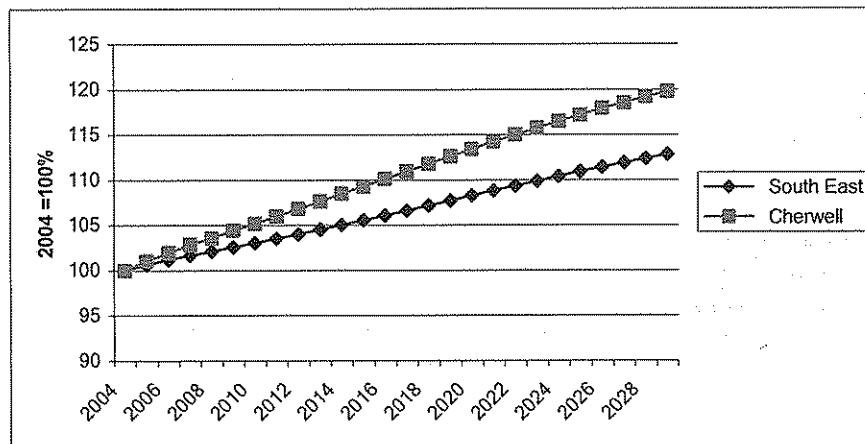
3.15 The travel to work area shows some important trends which can be summarised as follows:

- Firstly, the local area's self-containment rate is low, 35%, although as discussed in the policy section previously it is not possible to achieve a perfect match between residents and workers;
- If Cherwell Council wishes to promote a better balance between local employment and local population there is a need to increase the number of jobs in the local area. Furthermore, population is set to grow in the District in the medium and long run (we look at population projections below);
- The Heyford Park local area provides employment for a large number of District workers - 74% of workers are from the District. There is good reason to expect that the NOC proposals will not lead to large levels of in-commuting and the majority of the jobs would go to the growing District workforce.
- We have extracted the District commuting data provided in Appendix 1- this shows that overall Cherwell District is a net exporter of labour. There are fewer jobs than workers in the District. Again if the Council is to seek a better balance between the local population and local jobs more jobs need to be provided locally.

Population projections

3.16 Figure 3.2 illustrates the population forecasts from the Office for National Statistics provided at regional and district levels. This shows that between 2004 and 2016 the population of Cherwell is expected to grow by 10 percent compared with the regional average of 6 percent. In the long term to 2021, the population is forecast to grow by 14 percent compared to the regional average of 9 percent.

Figure 3.2 Population projections



Source: ONS

- 3.17 Whilst population is projected to grow, the proportion of economically active working age population is expected to fall, primarily due to the aging workforce. As part of the RSS projections for the South East a number of scenarios were developed to take this into account: it was assumed that the economic inactivity rates would increase from 17.9 percent to 20 percent in the medium (2016) and long (2020) run. Even taking such changes into account the growth in population will generate a need for employment in Cherwell to serve an increasing labour force.

Employment needs

- 3.18 In this section we examine employment in the local area.

Current Employment

- 3.19 Table 3.4 below presents the current employment make-up of Cherwell and Heyford Park's local area relative to the national and regional averages. The data shows:
- In 2005 there were approximately 66,600 jobs in Cherwell District and approximately 5,700 jobs in the local area¹⁰;
 - The largest employment sector in the local area is public administration, education and health;
 - Compared to the national and regional averages Cherwell has a higher proportion of employment in manufacturing sectors and in distribution, hotels and restaurants; and a lower share of employment in banking finance and insurance sectors and public administration, education and health sectors.

¹⁰ These data are the latest data from ABI. Due to variations in the data collection methods they are not directly comparable with the Census 2001 data that shows 6,071 jobs in the local area in 2001.

Table 3.4 Employment in broad sectors, 2005

	England and Wales	South East	Cherwell	The Local Area
Total Employment =100%	24,111,694	3,762,418	66,598	5,724
Agriculture and fishing (SIC A,B)	1%	1%	2%	0%
Energy and water (SIC C,E)	0%	1%	0%	0%
Manufacturing (SIC D)	11%	9%	15%	5%
Construction (SIC F)	5%	4%	4%	4%
Distribution, hotels and restaurants (SIC G,H)	24%	26%	28%	21%
Transport and communications (SIC I)	6%	6%	5%	4%
Banking, finance and insurance, etc (SIC J,K)	21%	24%	19%	20%
Public administration, education & health (SIC L,M,N)	27%	25%	22%	42%
Other services (SIC O,P,Q)	5%	5%	4%	4%

Source: ABI

3.20 For the purposes of this study we are particularly interested in the type of employment in the local area - and convert the relevant employment sectors to B-class property space. We classify jobs based on the Standard Industrial Classifications (SIC 2003), shown in Appendix 2. For offices we use the ODPM's definition of office employment.¹¹ For industry and warehousing, we use the definition based on a sector to land-use mapping exercise which we undertook for the GLA in 2004,¹² and which informed the relevant London Plan policies.

3.21 The 'goodness of fit' between sectors and types of space is not perfect; hence our definitions of office and industrial/warehousing jobs are no more than approximations. But these are the best possible estimators we have for B-space employment and we have developed these through a series of employment space studies. Government Guidance on Employment Land Reviews (ODPM, 2004) endorses our approach, citing our definitions, which we have subsequently improved.

Table 3.5 B-space Employment, 2005

Employment 2005	All Employment	All B-space	Industrial	Offices	Warehousing	
England and Wales	24,111,700	100%	42%	14%	21%	7%
South East	3,762,400	100%	41%	11%	21%	8%
Oxfordshire	308,800	100%	40%	13%	20%	7%
Cherwell	66,600	100%	42%	17%	16%	9%
The Local Area	5,700	100%	34%	6%	20%	8%

Source: ABI, RTP

3.22 Table 3.4 demonstrates the following:

- The local area has comparatively low employment in B-space sectors. This is because of the low levels of employment in industry. Employment in office and warehousing sectors are similarly distributed as the national, regional and county averages.
- The distribution of B-space in the local area suggests that industrial activities are under-represented in the area.
- Compared to the national, regional and county employment, Cherwell District has a lower share of office jobs; a higher than average share of industrial jobs and a similar share of warehousing jobs.

¹¹ Producing Boundaries and Statistics for Town Centres, ODPM, 2002

¹² Industrial and Warehousing Land Demand in London, GLA, 2004

- 3.23 In line with the discussion in the previous section Cherwell has a higher proportion of employment in "lower skilled" sectors to match the existing labour force. As part of the Council's aspiration to upgrade the economic structure of the District there will be an increasing requirement for B1(a) & (b) space. However there will remain a need for jobs appropriate for the "lower skilled" labour force that tends to be employed in B2 and B8 space amongst others. The NOC proposal provides such opportunities.

Summary

- 3.24 The technical document of the Huggins Competitiveness Index notes "competitiveness does involve balancing the different types of advantage that one place may hold over another - the range of differing strengths that the socio-economic environment affords to a particular place compared to somewhere else."
- 3.25 Cherwell needs to strike a balance between nurturing higher skills and high value-added jobs whilst maintaining its current economic strengths - which means planning strategically for those in the workforce who are not necessarily highly qualified workers. In line with policy a range of opportunities should be provided including knowledge based employment opportunities and opportunities for the not so highly qualified labour force. The NOC's proposals provide for range of opportunities across the B-class uses which cannot easily be achieved at another site in Cherwell.
- 3.26 The high levels of out-commuting from the local area, coupled with the projected increase in population both argue for additional job creation in the area to increase sustainability.
- 3.27 The low proportion of employment in the B use classes in the local area also argues for additional development to widen the range of local job opportunities.

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4 SUPPLY AND DEMAND IN CHERWELL

Introduction

- 4.1 In this section we examine the demand for B-space in Cherwell comprising industrial/warehousing and office space, based on employment forecasts. We compare it with *planned supply* - comprising the land currently identified by the planning system for B-class development. The objective is to show:
- There is demand for the type of space NOC is proposing particularly in the short to medium term;
 - The proposals for the Heyford Park site will provide a sustainable and better balance between jobs and workers in the district.

Demand Analysis

- 4.2 The analysis of demand for B-space in Cherwell district is based on employment forecasts produced by Experian Business Strategies (Experian). The South East England Regional Assembly (SEERA) commissioned Experian to produce economic and employment forecasts for the South East to help inform development of the South East Plan (RSS 9).
- 4.3 Although a contract between SEERA and Experian inhibits replication of the forecasts at district level, we commissioned Experian to provide forecasts for Cherwell using the same model (the results are given in Appendix 3)¹³. We translate the employment forecasts into a space requirement based on the definition in Appendix 2 and using standard employment densities based on a 1997 study by Roger Tym & Partners for SERPLAN¹⁴:
- Offices: 18 square metres per worker;
 - Manufacturing: 29 square metres per worker;
 - Warehousing: 40/ 80 square metres per worker¹⁵;
 - Industrial space (manufacturing and distribution): 32 square metres per worker.
- 4.4 We prefer the densities above to the available alternatives, including those put forward by DTZ Pieder for SEERA, because they are supported by a large and statistically rigorous survey.

We focus the analysis on the short (2011) to medium term (2016) planning time horizons. The NOC proposal would come forward in these periods.

District forecasts

- 4.5 Table 4.1 below provides the employment forecasts for Cherwell district. According to the Experian forecasts, total employment and employment in B-space sectors in Cherwell district will grow by 7% over ten years (to 2016).

¹³ Experian demographic data is based ONS's based sub-national projections, and adjusted for the dwelling allocation at district detailed in the regional spatial strategy. Additionally, Experian's regional migration assumptions take account of differentials in on employment opportunities where people generally migrate towards jobs. The adjustments are controlled so that the final projections remain within 2% of the 'policy-based' projections.

¹⁴ Roger Tym & Partners for SERPLAN, The Use of business space: Employment Densities and Working Practices in South East England, 1997.

¹⁵ Given the type of employment proposed by NOC we use the low employment density taken from English Partnerships, Employment Densities - a full guide, produced by Arup, 2001.

Table 4.1 Employment and floorspace projections Cherwell by sector

Total Employment	2006	2011	2016	change 2006-2011		change 2006-2016	
Industrial	13,800	14,300	14,200	520	4%	450	3%
Warehousing	7,400	7,500	7,700	120	2%	260	4%
Industrial& Warehousing	21,200	21,800	21,900	640	3%	720	3%
Office	12,900	13,900	14,600	1,010	8%	1,680	13%
Total B-space	34,100	35,700	36,500	1,650	5%	2,400	7%
Total Floorspace (sq.m)	2006	2011	2016	change 2006-2011		change 2006-2016	
Industrial	441,400	458,100	455,900	16,700	4%	14,500	3%
Warehousing	592,700	602,400	613,800	9,600	2%	21,100	4%
Industrial& Warehousing	1,034,100	1,060,400	1,069,700	26,400	3%	35,700	3%
Office	232,000	250,200	262,300	18,200	8%	30,300	13%
Total B Space	1,266,100	1,310,600	1,332,100	44,500	4%	66,000	5%

Source: Experian

- 4.6 In the medium term, B-space employment is projected to increase by approximately 2400 jobs or 66,000 sq m. As would be expected office employment is set to grow at a faster pace than warehousing and industrial employment, 13 percent compared to 3 percent. Nevertheless in the medium term employment in B2/B8 space is expected to grow providing an additional 720 jobs in the district thus increasing the demand for B2/B8 space.
- 4.7 The NOC proposal is for an additional 585 B-space jobs on the Heyford Park site in the short to medium run. This is equivalent to 24 percent of the projected B-space employment to 2016. However this assumes that all additional B-space employment on the site will be new employment in the district. In addition to the new growth depicted in the table, CDC will need to provide employment land and premises to replace any industrial land lost in the short and medium term.
- 4.8 The recent employment land review for Cherwell¹⁶ showed that 12.5 percent of all employment land, or 53.3 hectares, in the district was in poor or very poor condition. Employment from these poor quality sites can be expected to relocate within the district as the quality of the site deteriorates and if new opportunities, such as the Heyford Park development, are provided within the district.
- 4.9 The risk is that if no new opportunities are provided in the medium term, employment will be lost out of the district. Therefore in reality the development at Heyford Park is likely to attract existing B-space occupiers thus capturing less than 24 percent of the net change in employment in the medium run.

Planned Supply

- 4.10 Information on the supply of employment land for Cherwell District is taken from the latest employment land review¹⁷. The sites in Table 4.2 below were identified through:
- A survey of employment land in the District. This involved on-site inspection of all allocated employment sites in the District supplemented by market research
 - The allocations from Cherwell district's non-statutory Local Plan.

¹⁶ Cherwell District Employment Land Review, URS July 2006

¹⁷ Cherwell District Employment Land Review, URS July 2006

Table 4.2 Development sites in Cherwell

Site Name	Site Area (Ha)
Banbury	
Banbury Cross Business Park	2.5
Banbury Cross Business Park	1.0
Banbury Cross Business Park	3.3
Land North of Overthorpe Road	5.8
Banbury Cross Business Park	1.0
Land South of Overthorpe Road	21.0
Alcoa Site	0.9
West of Hardwick Farm	0.7
Alcan Site	10.6
Beaumont Industrial Estate	0.6
Beaumont Industrial Estate	0.1
Marley Industrial Estate	0.0
Marley Industrial Estate	0.5
Total	48.0
Bicester (ha)	
Launton Road	3.4
Airfield - Technical Buildings	3.5
East of A41 Oxford Rd	16.0
Bicester Park	0.8
Total	23.7
Kidlington (ha)	
West Side of Canal	0.6
West Side of Canal	0.8
Oxford Spires	0.9
Oxford Spires	0.4
Motor Park	0.5
Total	3.2
Rural Cherwell	
Banbury Business Park	3.6
Brymbo Works Ironworks	0.7
PA Turneys Weston on the Green	1.9
Total	6.2

Source: URS

- 4.11 The land survey identified 25 potential sites for employment development in Cherwell, totalling approximately 80 hectares of land.
- 4.12 We translate the site areas into floorspace by applying a plot ratio of 40 percent (4,000 square metres of floorspace per hectare of site area). Plot ratios vary widely for different sites, particularly for office, where tall buildings with reduced car parking may deliver two or three times more floorspace per hectare. These are approximations but they are the best possible estimators we have.

Table 4.3 Summary of Employment Floorspace 'Capacity' in Cherwell

Cherwell Totals Location	Available Development area		
	Ha	Sq.m	% of total
Bicester	23.7	94,800	29%
Banbury	48	192,000	59%
Kidlington	3.2	12,800	4%
Rural	6.2	24,800	8%
Total	81.1	324,400	100%

Source: Cherwell District Employment Land Review, URS, 2006

- 4.13 The table above shows that the supply of employment land in the district has a theoretical 'capacity' of approximately 324,400 sq metres.
- 4.14 There is a considerable mismatch between the supply of and potential demand for employment land in Cherwell, as shown in Table 4.1 and Table 4.3 above, with a large oversupply overall.
- 4.15 This mismatch is particularly marked in Banbury, which has 59% of the available employment sites, by area, compared with 31% of the working age population, whereas Bicester, Kidlington and Heyford Park's local area have 33% of the employment sites, compared with 45% of the working age population. The position is shown in Table 4.4 below.

Table 4.4 Population distribution in Cherwell, 2001

	Working age		Land allocation	
	No.	% of total	Ha	% of total
Banbury	27,700	31%	48	59%
Bicester	21,980	25%	23.7	29%
Kidlington	9,020	10%	3.2	4%
The Local Area	9,060	10%	n/a	n/a
Rest of Cherwell	20,190	23%	6.2	23%
Total Cherwell district	87,950	100%	81.1	100%

Source: Census 2001; Cherwell District Employment Land review, URS, 2006

- 4.16 While an element of the mismatch has been accounted for by a high level of out-commuting from 'South Cherwell' to Oxford it is not realistic to expect this to continue to grow in line with the population, both on grounds of sustainability, and because Oxford's high level of in-commuting cannot be expected to grow.
- 4.17 The spatial mismatch between supply and demand underpins the case for maintaining current employment at Heyford Park, and for a modest increase in opportunities there to improve sustainability and provide opportunities for the growing population.
- 4.18 In the short term the case for this is even stronger, as the short term availability of land in Bicester is considerably less than that shown in Table 4.2 and Table 4.3.
- 4.19 Of the 23.7 hectares shown as available in Bicester in Table 4.2 only 4.2 hectares (Launton Road and Bicester Park) is available in the short term. Neither the Airfield Technical Buildings (3.5ha), nor the land East of the A41 (16.0ha), are available for development in the near future (we understand that a planning application has now been made for an access to the A41 for the Land to the East, but it will still be some time before development can start). By way of illustration, Box Technologies, a firm of the type the Cherwell EDS wishes to see growing in Bicester, recently relocated to Thame because they could not find suitable premises in Bicester in which to grow.
- 4.20 Most of the available sites, including the rural ones, are in Banbury and north Cherwell. We can reformulate Table 4.3 to show this.

Table 4.5 Short Term Distribution of Employment Land in Cherwell

Cherwell Totals Location	Available Development area		
	Ha	Sq.m	% of total
Banbury & N Cherwell	52.3	209,200	85%
Bicester	4.2	16,800	7%
Kidlington	3.2	12,800	5%
Weston-on-the Green	1.9	7,600	3%
S Cherwell Sub-total	9.3	37,200	15%
Total	61.6	246,400	100%

Source: Cherwell District Employment Land Review, URS, 2006, RTP

- 4.21 In the short term position of a limited supply of land in the southern part of Cherwell, the Site offers opportunities for a wide range of businesses wishing to start-up in, or relocate to, the southern part of Cherwell district until the land East of the A41, to the south of Bicester, is brought forward.
- 4.22 Even when the land East of the A41 is available, Cherwell DC will wish to ensure that such a well-located and high-profile site is used to attract firms in knowledge based sectors to raise the employment profile of Bicester in accordance with their EDS and Structure Plan Policy E3. Heyford Park can, as it does at present, serve as a location for a wide range of activities, particularly those which are labour extensive, and which would be a wasteful use of land in the employment areas of Bicester and Kidlington.
- 4.23 Based on the pattern of the distribution of employment and population, we conclude that the NOC proposals for Heyford Park, while slightly higher than Cherwell Council envisages, will not produce an imbalance in the district and will in fact help achieve a more sustainable balance between jobs and workers in the short to medium run.



5 CONCLUSIONS

- 5.1 The NOC proposals for B-class employment space total about 116,064 square metres from the retention, selective refurbishment and re-use of existing buildings together with some B1 new build at Heyford Park.
- 5.2 In relation to regional policy the site is outside the Central Oxfordshire Sub-region and is therefore an opportunity site to retain uses other than those within the focus on knowledge-based employment for the sub-region. The NOC proposal is generally aligned with the Draft South East Plan's general policy RE2 through its intensification of the use of an existing site and their efficient use. The proposal will also promote mixed use development providing a range of employment opportunities for the existing and future labour force.
- 5.3 In relation to the Structure Plan, the proposal supports many aspects of policies E1 and E3. In particular the site provides an opportunity for existing local firms that significantly contribute to the local economy. The opportunities it presents as a location for employment and land extensive uses (such as some B8) indirectly supports urban focus by reducing the need to locate such uses on land in or adjacent to urban areas.
- 5.4 In relation to CDC's Planning Brief for Heyford Park the proposals provide a range of employment opportunities. These should be on a larger scale than those proposed in the brief to meet the needs of a wider area than Heyford Park itself - a more realistic basis on which to assess self-containment.
- 5.5 Examination of the pattern of economic activity and skills in the area around Heyford Park shows:
- The need for a range of jobs to cater for the range of skills and qualifications locally;
 - A need for additional employment opportunities to reduce the level of out-commuting from the local area - particularly needed with the additional dwellings at Heyford Park itself;
 - The low level of local employment in B-class uses argues for development of this type.
- 5.6 There is a strong skew in the availability of employment land towards Banbury - far in excess of its share of working age population and jobs. This is particularly marked in the short term because of the shortage of available good quality sites in Bicester. Within the short term Heyford Park should be seen as an opportunity site to redress the effective shortage of employment land in the southern end of Cherwell district - in the longer term it has a role to play continuing to redress the imbalance across the District, and as the location for a wide range of jobs.



APPENDIX 1

Cherwell District Commuting Data



Live in Cherwell, work in...			Work in Cherwell, live in...		
Total	70304		Total	65273	
Cherwell	45325	64%	Cherwell	45325	69%
Oxford	9095	13%	South Northamptonshi	4474	7%
West Oxfordshire	2214	3%	West Oxfordshire	3013	5%
South Northamptonshire	2029	3%	Oxford	1850	3%
Vale of White Horse	1643	2%	Aylesbury Vale	1679	3%
Aylesbury Vale	1251	2%	Vale of White Horse	1197	2%
South Oxfordshire	1182	2%	Stratford-on-Avon	1184	2%
Stratford-on-Avon	658	1%	Daventry	916	1%
Wycombe	570	1%	South Oxfordshire	859	1%
Milton Keynes	496	1%	Warwick	347	1%
Warwick	433	1%	Milton Keynes	268	0%



APPENDIX 2

Economic Sectors and Business Space

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Industrial Sectors	SIC (2003)	Activities
Manufacturing	15.11-37.20 (ex publishing, 22.11-22.15)	<ul style="list-style-type: none"> ▪ Includes all manufacturing, including recycling, but excludes publishing)
Some Construction	45.3-45.4	<ul style="list-style-type: none"> ▪ Electricians ▪ Plumbing ▪ Other building installation ▪ Plastering ▪ Joinery installation ▪ Floor and wall covering ▪ Painting and glazing ▪ Other building completion
Motor Vehicle Activities	50.20, 50.40	<ul style="list-style-type: none"> ▪ Maintenance and repair of motor vehicles ▪ Sale, maintenance and repair of motor cycles and related parts and
Sewage and Refuse Disposal	90.00	<ul style="list-style-type: none"> ▪ Sewage and refuse disposal, ▪ Sanitation and similar activities.
Labour Recruitment and Provision of Personnel (part) ¹⁸	74.5	<ul style="list-style-type: none"> ▪ Labour recruitment and provision of personnel
Warehousing Sectors	SIC (2003)	Activities
Wholesale	51.11-51.70	<ul style="list-style-type: none"> ▪ Wholesale on a fee contract basis ▪ Wholesale of goods
Freight Transport by Road	60.24	
Cargo Handling	63.11	
Storage and Warehousing	63.12	
Other Supporting Land Transport Activities	63.21	
Post and Courier Activities	64.11-64.12	
Packaging Activities	74.82	<ul style="list-style-type: none"> ▪ Packaging activities
Labour Recruitment and Provision of Personnel (part)	74.5	
Office Sectors (including R&D)	SIC (2003)	Activities
Some Other Business Activities	74.60, 74.85, 74.86, 74.87 74.1, 74.2, 74.3, 74.4	<ul style="list-style-type: none"> ▪ Investigation and security activities ▪ Secretarial and translation activities ▪ Call centre activities ▪ Other business activities nec ▪ Accounting/bookkeeping activities etc ▪ Architectural/engineering activities etc ▪ Technical testing and analysis ▪ Advertising

¹⁸ Labour Recruitment and Provision of Personnel covers all the workers employed through agencies. These workers operate in a wide range of activities throughout the economy. Therefore, we allocate them to industrial, warehouse, office and non-B sectors in proportion to their shares in Crawley's total employment.

Office Sectors (continued) Some Social and Personal Service Activities	91.11, 91.12, 91.20, 91.32, 91.33, 92.11, 92.12, 91.20, 91.32, 91.33, 92.11, 92.12, 92.20, 92.40	<ul style="list-style-type: none"> ▪ Activities: business/employers orgs ▪ Activities of professional orgs ▪ Activities of trade unions ▪ Activities of political orgs ▪ Activities other membership orgs ▪ Motion picture and video production ▪ Motion picture and video distribution ▪ Radio and television activities ▪ News agency activities
Administration of the State	75.1, 75.3	<ul style="list-style-type: none"> ▪ Administration of the State and the economic and social policy of the community ▪ Compulsory social services activities
Publishing	22.1	
Financial intermediation	65, 66, 67	<ul style="list-style-type: none"> ▪ Financial intermediation, except insurance and pension funding ▪ Insurance and pension funding, except compulsory social security ▪ Activities auxiliary to financial intermediation
Real Estate and Business activities	70, 72, 73	<ul style="list-style-type: none"> ▪ Real estate activities ▪ Computer and related activities ▪ Research and development
Labour Recruitment and Provision of Personnel (part)	74.5	

APPENDIX 3

Cherwell District Employment Forecast data



	2006	2016	2020
Agriculture, Forestry & Fishing	2,070	1,920	1,820
Oil & Gas Extraction	0	0	0
Other Mining	60	40	40
Gas, Electricity & Water	180	130	120
Fuel Refining	0	0	0
Chemicals	230	210	210
Minerals	80	50	40
Metals	1,110	1320	1,370
Machinery & Equipment	860	690	570
Electrical & Optical Equipment	2,290	2370	2,370
Transport Equipment	580	250	120
Food, Drink & Tobacco	1,740	1620	1,530
Textiles & Clothing	160	160	120
Wood & Wood Products	200	300	300
Paper, Printing & Publishing	2,180	2430	2,490
Rubber & Plastics	1,010	1090	1,050
Other Manufacturing	380	400	400
Construction	5,120	5470	5,600
Retailing	9,180	10370	10,680
Wholesaling	7,070	7010	7,070
Hotels & Catering	4,290	4930	5,110
Transport	3,020	3060	3,000
Communications	1,320	1270	1,260
Banking & Insurance	1,190	1290	1,230
Business Services	12,390	13830	14,420
Other Financial & Business Service	1,570	1880	1,930
Public Admin. & Defence	5,750	5580	5,330
Education	3,600	3810	3,890
Health	6,200	6740	6,900
Other (mainly public) Services	4,200	5,370	5,630
TOTAL	78,000	83,600	84,600