

# A review of innovation spaces in Oxfordshire

Report to Oxfordshire LEP

January 2017

**SQW**



# 1. Introduction

1.1 This project was commissioned by the Oxfordshire Local Enterprise Partnership, with three main objectives:

- Map the current and planned innovation spaces across Oxfordshire, and categorise into the types and sizes of business supported and the innovation support provided. This was done by using a questionnaire to undertake an on-line survey of operators of innovation spaces
- Identify gaps in current and planned provision, which may relate to types of space, firms, sectors or locations, in the context of likely future demand
- Provide an outline of the role that Oxfordshire LEP and others could play in addressing gaps and improving future provision of innovation space and support, and the relationship between the two.

## A definition of innovation spaces

1.2 The following definition was agreed with the client, in order to focus the work:

*Innovation spaces provide entrepreneurs and businesses with accommodation on flexible terms and access to supporting administrative, business and innovation support services and networks.*

1.3 At the smallest and most informal end of the spectrum, this rules out coffee shops, internet cafes and similar facilities which may be used informally by entrepreneurs for business purposes but whose primary purpose is not to provide business space and innovation support.

1.4 At the largest end of the spectrum, the definition includes science and technology parks which provide flexible terms on space and access to supporting business and innovation services. However, it rules out office, business and industrial parks run simply as property schemes.

1.5 In between, this definition also rules out managed workspace such as that provided by Regus which provides only space on flexible terms and basic services such as a reception desk and access to meeting rooms. There is no innovation element to the facilities and services provided. However, there is in practice a continuum in terms of the type and amount of support provided, over and above physical space in which to work, therefore there is an element of judgement about what falls within, and outside, the above definition of innovation spaces.

## The different types of innovation spaces

1.6 Following discussion with a selection of innovation space providers in Oxfordshire, we agreed the following categories of innovation space:

- Small office units
- Small workshop units

- Dry laboratory units
- Wet laboratory units
- Co-working/hot desk (office) space
- Co-working hack/maker space (workshops/workbenches)
- Co-working laboratory space
- Accelerator programme which makes use of innovation space
- Science Park including a mix of buildings providing different sizes and types of space

1.7 The survey of innovation spaces enabled respondents to include more than one type of space in their response. This was to cover cases which provide a mix of types of spaces: for example, an innovation centre with small office units which also includes co-working space, or a science park which also includes an innovation centre.

1.8 The following chapters provide information on: the number and range of innovation spaces in Oxfordshire (Chapter 2); the survey process and results (Chapter 3); an assessment of gaps in existing and planned supply (Chapter 4); and recommendations on measures to fill gaps and the role of Oxfordshire LEP (Chapter 5). In addition there are annexes which include a list of consultees and the survey questionnaire.

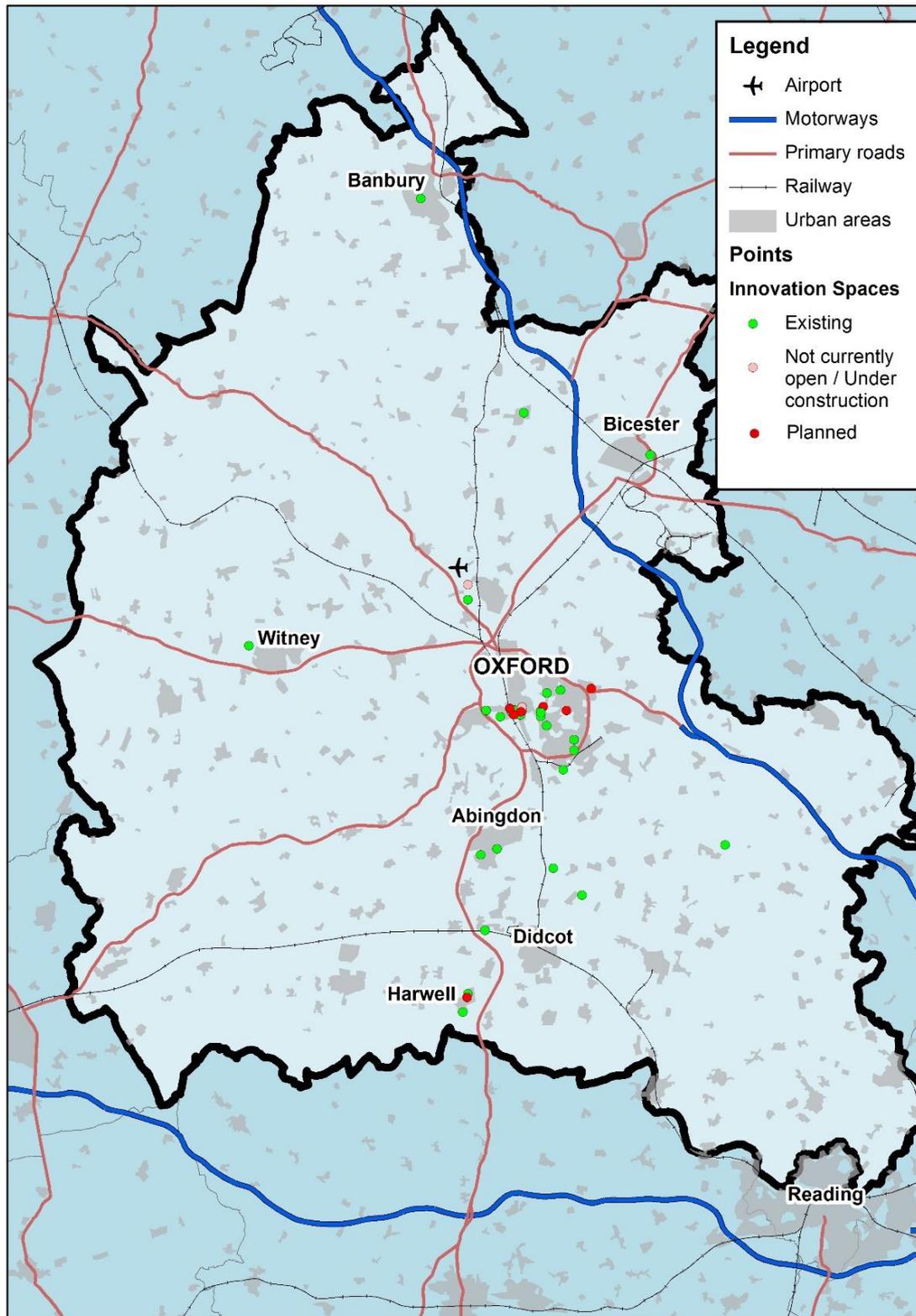
## 2. Innovation spaces in Oxfordshire

- 2.1 The first stage of work involved collecting information on all existing and planned innovation spaces in Oxfordshire. In the first instance these were identified from existing knowledge and discussions with a few individuals who know the situation in Oxfordshire well (see Annex A).
- 2.2 We then reviewed all the available information from the relevant websites, to categorise the spaces appropriately. However, the only data that were consistently available for all spaces was name and contact details.
- 2.3 Using this approach we were able to identify 48 innovation spaces<sup>1</sup> in Oxfordshire, including 35 existing and 13 planned. They range from small co-working spaces to large science parks, and are found across the whole of the county though with a strong concentration in and around Oxford. Maps 2-1 and 2-2 show the location of these innovation spaces, across the county as a whole, and within Oxford city.
- 2.4 In addition, another 25 workspaces were identified, including eight in Oxford and 17 elsewhere in the county. These make an important contribution to the Oxfordshire economy by providing premises on flexible terms for new and small businesses, but they do not fall within the definition of innovation spaces because they do not provide business and innovation support services in addition to the property offer.

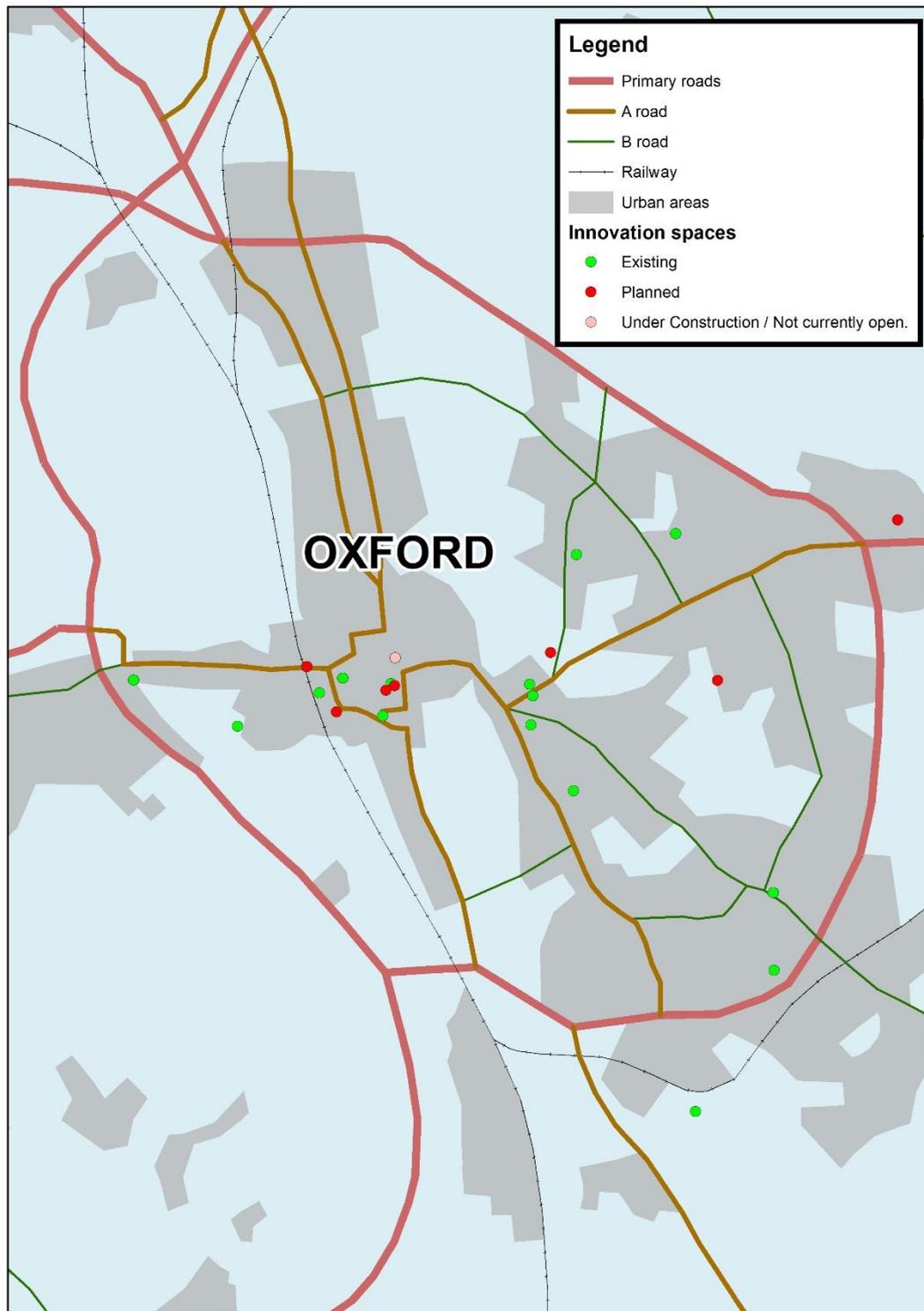
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<sup>1</sup> We have counted innovation centres on science parks, and the science parks themselves, as separate innovation spaces. For example, both Begbroke Science Park and Begbroke innovation centre, which is located within the science park, are counted as separate innovation spaces

Map 2-1: Location of existing and planned innovation spaces in Oxfordshire



Map 2-2: Location of existing and planned innovation spaces – Oxford city



Source:

## Existing innovation spaces

- 2.5 The existing innovation spaces are listed in Table 2-1. Oxfordshire was an early beneficiary of innovation spaces: the first innovation centre in Oxfordshire was created in 1985 by the Oxford Trust under Sir Martin and Lady Audrey Wood. Over the years the number of

innovation spaces has continued to increase, including five science parks – Begbroke, Culham Harwell, Milton Park and Oxford Science Park (see paragraphs 2.10 to 2.11). Most recently, various co-working spaces have been created in Oxford (including for office based and workshop based activities), together with some new innovation centres (e.g. 1 St Aldgates) and some which have been expanded (e.g. at Begbroke).

**Table 2-1: Existing innovation spaces in Oxfordshire**

<b>Oxford - name of space</b>	<b>Type of space</b>	<b>Elsewhere in Oxfordshire Location &amp; name of space</b>	<b>Type of space</b>
1 St Aldates, Oxford	Small office units	<b>Abingdon</b>	
Oxford Centre for Innovation	Small office units	Oxford Wood Recycling	Workshops
16-17 Turl Street, Oxford	Co-working office	<b>Banbury</b>	
Oxford Innospace	Co-working office	Banbury Innovation Centre	Small office units
The Old Music Hall, Ethical Property Ltd.	Co-working office	<b>Begbroke</b>	
Peter Brett Associates	Co-working office	Begbroke Science Park, including:	Science park
Launchpad, Said Business School	Co-working space	- Begbroke Innovation Centre	Small office units
Openworks, Oxford	Co-working space		
Oxford Sciences Innovation	Co-working space	<b>Bicester</b>	
Pow Wow, Grant Thornton	Co-working space	Bicester Innovation Centre	Small office units
Oxford University Innovation Startup Incubator	Co-working space	<b>Culham</b>	
Oxford Hack Space	Hack space	Culham Science Centre, including	
Oxford Enterprise Centre	Individual offices and workshop units	Culham Innovation Centre	Small office units
Oxford VIEW	Workshops	<b>Didcot</b>	
Bioinnovation Hub, Oxford Brookes University	Contained and co-working laboratory space	Milton Park, including	Science Park
Oxford Science Park, including:	Science park	- Milton Park Innovation Centre	Small office units
- Magdalen Centre	Small office units	<b>Harwell</b>	
		Harwell Campus including:	Science park
		- European Space Agency BIC	Small office units
		- Genesis 1	Small office units
		- Harwell STFC	Small office units
		Harwell Innovation Centre	Small office units
OVADA	Unknown	<b>Long Wittenham</b>	

Oxford - name of space	Type of space	Elsewhere in Oxfordshire Location & name of space	Type of space
		Sylva Wood Centre	Workshop co-working space
		<b>Upper Heyford</b>	
		Cherwell Innovation Centre	Small office units
		<b>Witney</b>	
		Witney Business & Innovation Centre	Small office units

Source: SQW research

## Planned innovation spaces

2.6 In addition to the existing innovation spaces, we identified 13 new innovation spaces either under construction or planned (Table 2-2). This includes four new business incubation facilities announced as part of the Oxford & Oxfordshire City Deal in early 2014: an Innovation Accelerator for advanced engineering businesses at Begbroke (completed – see Table 2-1); a Bioescalator on the Old Road site adjacent to existing research facilities and the Churchill Hospital; the Harwell Innovation Hub, focused on open innovation; and the UKAEA Culham Advanced Manufacturing Hub, focused on remote handling technologies. In addition, a new business centre, planned to be focused on environmental and green technologies, is planned for the NW Bicester Eco Development, the proposed Oxford Technology Park near the airport includes provision for an innovation centre, and the Oxford Northern Gateway development is expected to provide around 90,000 sq. m of technology park space. The Oxford Trust is developing a new innovation centre in Headington, and has converted the basement of OCFI into hack space. Oxford Innovation is also planning to provide more informal co-working and drop-in workspace in their existing centres as they are gradually remodelled.

**Table 2-2: Planned innovation spaces in Oxfordshire**

Oxford - name of space	Type of space	Elsewhere in Oxfordshire Location & name of space	Type of space
Activate MySpace	Co-working office	<b>Bicester</b>	
The Oxford Foundry	Co-working office	NW Bicester Eco centre	Small office units
POD2@Town Hall	Co working office	<b>Culham</b>	
Smart Oxford Incubator	Co-working office	Advanced Manufacturing Hub	Small workshop units
Oxford Bioescalator	Wet labs	<b>Harwell</b>	
The Hill, Headington	Accelerator	Harwell Genesis 2	Small workshop units
Wood Centre for Innovation	Small office units	<b>Kidlington</b>	
Oxford Northern Gateway	Science Park	Oxford Technology Park	Science Park
Centre for Islamic Studies, Oxford	unknown		

Source: SQW research

## Other flexible business space in Oxfordshire

- 2.7 In addition to the spaces listed in Tables 2-1 and 2-2, there are various managed office facilities in the county. These include the facilities listed in Table 2-3. Most of these spaces offer traditional office units, some also offer co-working desk spaces and a virtual office service (i.e. access to common facilities and services without use of office or desk space – often used by people working from home who need a separate business address and occasional access to meeting rooms, etc).
- 2.8 They are an important source of physical space provided on flexible terms for new and small firms in Oxfordshire, although these business centres were not included in the survey (the results of which are reported in Chapter 3) as they do not fall within the agreed definition of innovation spaces.
- 2.9 There is a fine dividing line between flexible business space and some innovation spaces. In practice there is a continuum of provision, but the distinction we have attempted to draw is between facilities which offer only physical space with administrative support such as reception and access to meeting rooms, and those which offer space, administrative support plus some form of support for business innovation.

**Table 2-3: Other business centres in Oxfordshire used by new and small firms**

Oxford	Facility	Location	Facility
Oxford	Clarendon Business Centre (Clarendon House)	Abingdon	The Workstation
Oxford	Clarendon Business Centre (Summertown)	Abingdon	OT Business Centre
Oxford	Clarendon Business Centre (Sandford Gate)	Berinsfield	Employment Action Group
Oxford	Clarendon Business Centre (Woodstock Road)	Bloxham	Bloxham Mill
Oxford	Pure Offices	Chalgrove	Jennings
Oxford	Regus	Chinor	The Sanderum Centre
Oxford	Urbanoid Workspace	Chipping Norton	CEBP, Cromwell Park
Oxford	Workspace	Didcot	Didcot Enterprise Centre
		Didcot	Formal Office Suites
		Enstone	Firoka, Heythrop Park
		Eynsham	Easy Offices
		Garsington	Jennings
		Long Hanborough	Easy Offices
		Milton Hill	The Core Business Centre
		Watlington	Watlington Business Centre
		Wheatley	Wheatley Business Centre
		Witney	Hexagon Business Centre

Source: SQW research supplemented by information provided by Richard Venables, VSL

## Accelerator programmes

2.10 There are various accelerator programmes available in Oxfordshire, which offer business support without any provision of physical space. The number and variety of accelerator programmes is increasing, following a general trend nationally and internationally. Examples include:

- Fab Accelerator, which has just run its first programme in Oxford, involving 15 participants attending 12 weekly sessions covering business growth and development. In future it is planned to run three programmes a year in Oxford
- Oxfordshire Social Entrepreneurship Partnership (OSEP), which runs programmes and provides funding to support the formation of social enterprise businesses, including with students from the two universities in Oxford
- Biostars and Bethnal Green Ventures, which are both national accelerator programmes offering their services to Oxfordshire firms.

## Science parks

2.11 The science parks in Oxfordshire are particularly important contributors to innovation space in the county, because of the scale and variety of premises and related services available to firms. They are also complex, because all include smaller innovation spaces, in the form of incubator or innovation centres, within the range of premises they offer.

2.12 There are five existing science parks in Oxfordshire, and two planned. The five existing science parks are:

- Begbroke Science Park – owned and operated by the University of Oxford, some three miles north west of the city centre and surrounded by Green Belt. It includes an innovation centre which has recently been expanded, University research centres, and a wide range of firms
- Culham Science Centre comprises primarily the United Kingdom Atomic Energy Authority's laboratory for plasma physics and fusion research with a new Materials Research Facility (MRF) and RACE (Remote Applications in Challenging Environments) facility as recent additions. There is also a range of property available for commercial uses, amounting currently to around 25,000 sqm, and including Culham Innovation Centre, run by Oxford Innovation.
- Harwell Campus, which includes extensive scientific research facilities operated by STFC, national and international organisations such as the Satellite Applications Catapult and the European Centre for Space Applications and Telecommunications, several incubators and innovation centres (including Harwell Innovation Centre, the ESA BIC, the incubator space within the STFC area, and Genesis 1 and 2), and large premises for more established firms
- Milton Park, which has evolved into the largest science park in Oxfordshire over time as more traditional industrial and logistics organisations have been replaced by

science and technology based firms. Milton Park Innovation Centre is located within the Park

- Oxford Science Park is located on the southern edge of the city and owned and managed by Magdalen College. The Magdalen Centre within the Park provides incubator space for new and small firms, and the remainder of the Park larger premises for more established firms

2.13 In addition, there are two science parks in the pipeline:

- Oxford Northern Gateway, which is on the northern edge of the city and is planned to be developed as a mixed use innovation district providing around 90,000 sq m of business premises, including innovation, incubator and co-working spaces, plus housing and ancillary uses
- Oxford Technology Park, a relatively small development close to Oxford Airport and planned to include an innovation centre within the first main building which is currently under construction.

## 3. The survey of innovation spaces

### Questionnaire design and content

- 3.1 The survey was designed with two key priorities in mind: firstly, maximising the response rate by keeping the questionnaire as short and focused as possible and enabling respondents to indicate where they wanted responses kept confidential; and secondly, designing question format and content in such a way as to maximise the information and benefit we could gain from the survey answers for subsequent analysis and conclusions.
- 3.2 In order to get the balance right between these two conflicting priorities, SQW initially conducted a pilot survey to determine an appropriate length and level of complexity of the questionnaire.
- 3.3 Two separate surveys were designed, one for existing innovation spaces and a separate one for planned spaces. Each survey was split into two parts: non-confidential and confidential responses. This approach was adopted in order to minimise data being withheld by respondents on the basis of its sensitive nature.
- 3.4 The survey was characterised by a variety of question types, including multiple choice questions and comment boxes, with the aim of obtaining both quantitative and qualitative responses to questions.
- 3.5 All innovation spaces were contacted by email, addressed to the manager of the space by name where possible. The survey was undertaken on-line, using Smart Survey software. We sent two follow up emails over successive weeks to non-respondents, which significantly increased the response rate. In total, we received responses from 20 out of 35 existing innovation spaces, and from 11 out of 13 planned spaces (an overall response rate of 65%).

### Survey results

#### *Types of innovation space*

- 3.6 The main type of existing innovation space in Oxfordshire is self-contained office space, followed by co-working office space. Other types of space that are provided as the “main” space of an innovation facility include self-contained and co-working workshops, and self-contained and co-working laboratories. Spaces in which co-working areas are the main use are mainly located in Oxford, and are typically smaller than the more traditional innovation centres with mainly separate office units.
- 3.7 Various of the existing innovation spaces include more than one type of space. The mix of main and subsidiary spaces is shown in Table 3-1 below. The main subsidiary types of innovation space provided are self-contained laboratories and co-working offices.

**Table 3-1: Types of space provided by survey respondents - existing innovation spaces**

Innovation facility	Main space	Subsidiary spaces					
		Offices units	Workshop units	Lab units	Co-working offices	Co-working workshops	Other
Oxford Centre for Innovation	Self-contained offices				x	x	
One St Aldates	Self-contained offices						
ESA BIC Harwell	Self-contained offices		x	x	x	x	Co-working lab
Witney Business and Innovation Centre	Self-contained offices				x		
Magdalen Centre	Self-contained offices			x			Other – science park
Cherwell Innovation Centre	Self-contained offices			x			co-working lab
Bicester Innovation Centre	Self-contained offices				x		
Culham Innovation	Self-contained offices			x			
Harwell Innovation Centre	Self-contained offices						
PowWow	Co-working offices						
Openworks Oxford	Co-working offices						
Oxford Launchpad	Co-working offices					x	
16-17 Turl Street	Co-working office space						
Oxford Sciences Innovation plc.	Co-working office space						
Oxford Innospace	Co-working office space						

Innovation facility	Main space	Subsidiary spaces					
		Offices units	Workshop units	Lab units	Co-working offices	Co-working workshops	Other
Oxford University Innovation Startup Incubator	Co-working office space					x	accelerator program
Sylva Wood Centre	Self-contained workshops					x	
Genesis 1 Harwell	Self-contained workshops						
Oxford University Begbroke Science Park	Self-contained labs	x		x			
Bioinnovation Hub	Self-contained labs / co-working lab				x		
Oxford Hackspace	Co-working workshops	x	x	x	x	x	co-working labs
Fab Accelerator	Accelerator programs						no physical location

Source: SQW

- 3.8 The focus of planned innovation spaces is rather different from existing spaces. The most common type of space to be provided in the future is co-working office space. There are also plans for future provision of self-contained offices, an accelerator programme with its own physical location, self-contained and co-working laboratories and self-contained and co-working workshops. Further spaces are also being planned but cannot be disclosed due to the confidential nature of this information. Table 3-2 below shows the planned distribution and provision of future innovation space across Oxfordshire.

**Table 3-2: Types of space to be provided by survey respondents - planned innovation spaces**

Innovation facility	Main space	Subsidiary spaces					
		Office units	Workshop units	Lab units	Co-working offices	Accelerator program	Other
Wood Centre for Innovation	Self-contained offices		x				
NW Bicester Eco Business Centre	Self-contained offices				x		

Innovation facility	Main space	Subsidiary spaces					
		Office units	Workshop units	Lab units	Co-working offices	Accelerator program	Other
The Hill	Accelerator program with space provided				x		
The Oxford Foundry	Co-working offices						
Smart Oxford Incubator	Co-working offices						
Activate MySpace	Co-working offices						Co-working workshop space
Oxford BioEscalator	Self-contained labs	x			x		Co-working laboratory
Genesis 2 Harwell	Self-contained workshops						

Source: SQW

### Amount of innovation space

3.9 We obtained details on the amount of space provided from most respondents. In terms of existing innovation spaces:

- ten providers of office units have between them 33,435 sq.m of space, including 428 discrete business units and 53 hot desks
- one provider of workshops has 620 sq.m. of space, with 12 discrete business units present and 5 hot desks
- two providers of laboratories have in total 4,580 sq.m. of wet lab and co-working lab space, including 32 discrete business units and 10 hot desks
- five providers of co-working space have in total 1,550 sq.m. of space including 26 discrete business units and 109 hot desks.

3.10 Information for planned spaces shows a picture of increasing diversity regarding the type of space proposed:

- one provider of office units plans to have 2,500 sq.m. of space
- one provider of workshop space plans to have 5,500 sq.m.
- one provider of self-contained laboratory space specified 1,400 sq.m. planned
- five providers of co-working office space plan to have a total of 3,170 sq.m. of space.

- 3.11 Therefore in total, once the currently planned facilities are all operational, 26 innovation spaces in the county will provide a total of 53,755 sq.m. of flexible business space of various kinds. This excludes the larger spaces provided for more established firms on the existing and planned science parks.

### ***Occupancy and turnover rates***

- 3.12 Occupancy rates over the last six months for 19 respondents ranged from 25% to 100%. However, 74% of respondents had occupancy rates of 80% or above for the last six months, with 53% of respondents reaching 90% or higher occupancy rates.
- 3.13 Ten existing innovation spaces and one planned space reported that they had a waiting list of firms wanting to take up a space at their facility. Five had waiting lists of five or more firms, with one innovation space having a waiting list of over 20 firms of various sizes.
- 3.14 The turnover rates for the innovation facilities are, in general, very low. Apart from three responses where 50 – 100% of net lettable space was likely to become vacant in a typical year, due to the “drop-in” nature of the spaces, 85% of respondents reported that 12% or less of net lettable space would become available in a typical year. Four of 11 respondents indicated that less than 5% of net lettable space is freed up over a typical year.

### ***Permanency of innovation space***

- 3.15 The survey revealed a picture of an increasing scale and range of innovation spaces, most of which are permanent facilities. 80% of respondents for the existing space survey, and 78% of planned spaces, expect to be in operation permanently (for five years or more). However, there are several spaces which are temporary, for example an organisation making currently spare floorspace available as a co-working environment for entrepreneurs.

### ***Virtual service***

- 3.16 Nine of the 20 existing spaces which responded to the survey have a virtual service offering for firms and entrepreneurs who don't rent physical space at the facility. In addition, 4 out of 10 planned spaces intended to provide virtual services.

### ***Internet speeds***

- 3.17 Download and upload speeds available at existing innovation spaces vary hugely. Download speeds could be found within the range of 10 – 1,000 Mbps. Upload speeds also varied from 10 – 1,000 Mbps.

### ***Specialist equipment***

- 3.18 55% of all survey respondents in existing spaces replied that their facilities offer access to specialist equipment. Responses regarding specific equipment including the mention of laser and 3D printers, AO laser cutter, AV equipment in meeting rooms, shared laboratory equipment, specialist woodworking machinery, specialist molecular biology equipment and digital signage, and (of course!) high-quality coffee machines.

- 3.19 Two of nine respondents for planned innovation spaces said they propose to provide access to specialist equipment, including tissue culture and freezer sample storage facilities for wet lab medical research.

### **Gateway policies**

- 3.20 40% of existing space respondents and 80% of planned spaces indicated that they have a formal gateway for entrepreneurs and businesses that wish to occupy space in their facility.

### **Business support and networking**

- 3.21 The number of full-time equivalent employees providing administrative support at innovation facilities ranged from having no such employees to at most 80 employees. There was less than one full-time equivalent employee on-site for 33% of existing facilities (out of a total of 18 responses). A majority (61%) had between one and seven full-time equivalent employees providing administrative support.
- 3.22 In relation to business or innovation support, responses ranged between none and 150 full-time equivalent employees. 24% of respondents provided part-time business and innovation support (less than one full-time equivalent employee), and 8 existing innovation spaces had no-one providing innovation or business support at the facility.
- 3.23 Four respondents had between 8 and 40 entrepreneurs in their facility taking advantage of one-to-one business support on the premises. However, nine respondents reported that they had no entrepreneurs receiving one-to-one business support at the facility.
- 3.24 Most innovation spaces held networking events for their businesses/entrepreneurs over the last six months. Four out of nineteen respondents held over 10 events over this period, and 12 held between one and six events. The frequency of events does not seem to be linked in any way to the size or type of innovation facility.
- 3.25 Three respondents said there were between 300 and 500 participants in total over the last six months at the networking events, while one indicated over 2,000 participants across 50 networking events during the six-month timeframe.
- 3.26 In relation to planned innovation spaces, all expected to be providing some administrative support. Three out of four respondents said they intended to have between 0.5 and 1 full-time equivalent employees providing innovation and business support on site. One co-working office space provider indicated that they planned to provide access to 40 full-time equivalent employees providing innovation and business support.

### **Links to innovation and funding organisations**

- 3.27 Half of existing innovation spaces and seven of the planned spaces are formally linked to one or more other innovation organisations. The following organisations were referred to: the Said Business School, the University of Oxford, Magdalen College, Harwell Innovation Campus, the Science and Technology Facilities Council, the European Space Agency, the Oxford Trust, Oxford Brookes University, Oxford University Innovation, the Oxford University Hospitals NHS Foundation Trust, the Oxford Academic Health Science Network and Rycotewood Furniture College.

- 3.28 Out of 20 existing innovation spaces, 4 are linked to specialist funding sources such as the Rainbow Seed Fund, sources through the University of Oxford and the Oxford Trust, and the business angel networks run by Oxford Innovation Ltd (Oxford Investment Opportunity Network and Oxford Early Investment Network). In addition, three of the planned innovation spaces expected to be linked to specialist funding sources, including through European Regional Development Fund and strong informal links to different seed and venture capital funds.
- 3.29 Seven of the 20 existing innovation spaces and four of the planned spaces are part of a bigger science park or similar property scheme that permits graduation by businesses into larger space.

### **Future plans**

- 3.30 Seven existing innovation spaces had firm plans to increase the amount of space they provide (e.g. the ESA BIC), or to broaden the offer (e.g. the Sylva Wood Centre aims to provide additional space for entrepreneurs to work with other materials (metal, plastic, etc). One respondent also planned to expand their current offer to include a series of workshops, networks and events, open for any business to attend.
- 3.31 Of the planned innovation spaces, most expect to be operational between mid-2017 and mid-2018. There was a wide range of survey responses concerning the current stage of development of the planned innovation facilities. Six of nine respondents are at an early planning stage including inception, feasibility and design evaluation. Two respondents indicated that their facilities are under construction. One respondent is still pursuing funding possibilities for the intended space.

### **Concerns expressed through the survey**

- 3.32 Respondents were invited to identify concerns they have about the provision of innovation space generally in the county, as opposed to their own specific needs.
- 3.33 There were various concerns expressed in relation to the balance between supply and demand, including:
- insufficient space of all sorts within the Oxford ring road
  - a lack of dry and wet laboratory and light industrial space generally in Oxfordshire
  - a lack of “science space in North Oxfordshire”
  - a need for more workshop and reasonably priced co-working space for the wider Oxford entrepreneurial community who are not attached to the Universities
  - A need for more grow-on space in the county, still on relatively flexible terms, to enable firms to move out of incubator or innovation centres, most of which have very high levels of occupancy.
- 3.34 There were also concerns expressed about access to information about the availability of different types of support for budding entrepreneurs (including innovation space, but also personal advice on developing business plans, accounting, certification requirements, etc).

For example, “there are various services, contacts and even angel connections about, but there is no flowchart on who to send them to when, and no online central repository of clear, categorized knowledge on this that is the canonical resource.... Flowcharts are needed, with phone numbers. In Oxford in particular, people also really need to know who is and isn't connected to the universities in terms of resources - quite a lot of confusion abounds about what services one can access and what are only for university people.”

- 3.35 Another concern was a perceived lack of diversity in the range of entrepreneurs found in innovation spaces. Women, LGBT and minorities appear to be under-represented in the county's innovation spaces, which according to the Social Enterprise Support Programme is due to negative social factors rather than a lack of interest. They argue that “input from individuals outside the 30-60 year old Caucasian male demographic can be very helpful in determining whether a space is truly welcoming in the right ways”.

### ***Suggestions regarding the future role of the LEP***

- 3.36 Suggestions regarding roles for the LEP included:

- work with existing innovation space providers in Oxfordshire to help them grow strong, and link them to networks. This includes active engagement with the new Start-Up and Grow-On Group comprising a group of partners and targeting specific business sectors with unmet and latent demand for workspace, whilst generating income through identification and use of under-utilised property assets.
- help to unlock funding from Government and any other sources for projects that can increase the supply of innovation space in Oxfordshire.
- undertake more strategic planning for future needs
- work more closely with developers and investors to get the right type of innovation spaces provided as part of larger developments (the LEP has already done this successfully in relation to Begbroke, Culham and Harwell – see paragraph 2.5).
- address the ‘bed blocking ‘ issue by supporting the provision of more grow on space, enabling firms within incubator and innovation spaces to move out more quickly as they grow, and thereby create more space for new starts in spaces which aim to focus on the early stages of business formation and growth. For example, The Oxford Trust has developed an escalator model, with the intention of bringing small start up companies in the POD and the Oxford Hackspace (co-working spaces) through to grow-on scale at OCFI, 1 St Aldgates and the new innovation centre being developed at Headington. The science parks in Oxfordshire can also offer this ability to scale up by moving within the development to more suitable, larger space. However, despite these initiatives, the availability of grow on space is a constraint on the effectiveness and impact of innovation spaces in Oxfordshire.
- Provide grants for individuals to devote time away from work to create hackspaces, including support for a downpayment on their first premises, getting them out of temporary hackspace arrangements in community centres a handful of times a week.

- Provide resources for leadership skills and group decision-making skills: “Co-working and sharing economy work arrangements are great, but leadership and teamwork skills really are needed for these places to survive. Otherwise, we will end up with only corporate co-working places with strong hierarchies and expensive charging models, and nothing non-profit or socially-oriented, which would be massively exclusionary for users even just based on price. It's healthy to have several kinds of facilities about”.

## Summary of key points from the survey

3.37 The survey results speak for themselves. However, key points from the perspective of future supply include:

- there is already a variety of innovation spaces in Oxfordshire, and this variety is increasing. In particular, the number of co-working spaces has increased in recent years and is planned to increase, particularly in Oxford. This reflects national and international trends in the provision of innovation spaces. There is also more laboratory and workshop space in the pipeline
- occupancy rates in existing spaces are generally very high, and some have waiting lists. Turnover is also low, which limits the amount of space available for new firms wanting to use innovation spaces
- a key issues is the lack of grow on space in the county, which would enable more firms currently in innovation spaces to move into larger, more self-contained units and free up innovation space for new firms. The science parks currently provide the best opportunities for firms to do this
- there are also concerns about a lack of specialist space such as laboratories and workshops, and shortages of various types of space within Oxford and in the north of the county
- just under half of all innovation spaces in the county offer a virtual service to firms which want to make use of the services and facilities such as a business address, use of meeting rooms and access to networking events, without taking space in the facility
- Broadband speeds appear to vary hugely across the innovation spaces surveyed. Whilst some provide very high speed connectivity, some spaces are unlikely to be suited to firms which require high upload and/or download speeds
- There is considerable variation in the amount of administrative, business and innovation support available to entrepreneurs and firms in innovation spaces. However, in general business and innovation support appears to be quite limited, except for those spaces linked to larger organisations or which form part of science parks
- Networking events are more common than the availability of dedicated business and innovation support.

- Several of the spaces provide access to specialist funding sources, but again this is limited
- Both universities are increasingly active in providing innovation spaces in which students can develop business proposals, and work in small start ups or with more established companies on academic-industry collaborations. However, there are some concerns that there is not the same increase in opportunities for entrepreneurs and firms not connected with the universities or research institutions.

## 4. Gaps in the supply of innovation spaces

- 4.1 This chapter considers whether there are likely to be any gaps in the supply of innovation spaces in Oxfordshire in the foreseeable future, in the light of likely future demand, national/international trends in the provision of innovation spaces, and existing and planned supply. These gaps may be in relation to the type or amount of space available to firms in different parts of Oxfordshire.

### Likely future demand

- 4.2 This study did not include a detailed demand assessment. Therefore this section focuses primarily on the potential for growth in the sectors which have been identified by Oxfordshire LEP as the most important to the future growth of the local economy, and including many of the most innovative firms in Oxfordshire.
- 4.3 A summary of the main characteristics of these key sectors, including scale, is provided in Table 4-1.

**Table 4-1: OxLEP key sectors**

#### ***Automotive and Motorsport***

Oxfordshire has over 24,000 people employed in manufacturing and 5,500 in engineering activities and technical consultancy. The county is part of the high performance technology and motorsport cluster which stretches into Northamptonshire, Milton Keynes and Bedfordshire. It includes both mainstream vehicle manufacturers (BMW Mini) and specialist motorsport firms (e.g. Williams, Prodrive) and their respective supply chains. Particular research based strengths in Oxfordshire include robotics, electric and autonomous vehicles, advanced engines and propulsion and advanced materials.

#### ***Creative and Digital***

There are around 22,000 employed in digital employment in Oxfordshire, and 3,000 creative and digital sector businesses generating more than £1.4bn annually. Specialisms include digital gaming, cyber security, software development and big data, and digital publishing.

#### ***Electronics***

Oxfordshire has 3,800 people employed in the manufacture of computer, electronics & optical products - almost a 2.5 times higher proportion of employees than the national average. Specialisms in relation to electronics include sensors, instrumentation, space technologies and medical applications.

#### ***Life Sciences***

Oxfordshire has around 180 companies in life sciences and more than 150 companies in associated industries. There are over 10,000 employed in scientific R&D and healthcare related manufacturing. And over 24,000 employed in human health activities in Oxfordshire (7.7% of the population). Specialisms include drug discovery and development, diagnostics, medical devices, digital health, precision medicine and genomics.

#### ***Space Technologies***

Oxfordshire is located at the centre of the UK's space industry. Harwell is the base for 55 space related organisations. The global space market is estimated to reach £400 billion by 2030, with the UK space industry anticipated to increase from its current position of £9 billion a year to £40 billion a year during the same period. UK employment in the industry is expected to increase to 100,000.

*Source: OxLEP key sector profiles*

- 4.4 Firms in the sectors included in Table 4-1 have different premises requirements, and to some extent cluster in different parts of the county. For example, engineering related businesses, such as are typically found in the automotive, motorsport, space and satellite technology sectors generally require workshop rather than office premises. Motorsport and related firms are mainly located in north and west Oxfordshire, whereas space and satellite technology firms cluster particularly around Harwell. Some firms require specialist premises and equipment: for example wet or dry laboratory space for bioscience firms. However, many firms operate perfectly well in basic office premises and are more concerned about the flexibility of the terms on which the premises are offered than the particular specifications of the space (although the quality and speed of telecoms connections are increasingly important to many firms, and very variable in the innovation spaces surveyed).

### **Cross-over opportunities**

- 4.5 One of the biggest opportunities for growth of the Oxfordshire economy is in exploiting the commercial opportunities at the interface between the key research and technological strengths. For example, medical technologies which exploit the interrelationships between advanced engineering and healthcare, and smart city applications which bring together combine expertise in electronics, big data, autonomous vehicles and satellite technologies.
- 4.6 This suggests a need for highly flexible premises, which can be converted to office, workshop or laboratory use quickly and at relatively low cost (for example, Genesis 1 and 2 at Harwell)

### **Other important sectors**

- 4.7 The largest employment sectors in Oxfordshire include education, health, tourism and retail and professional & business services. Of these, professional & business services are often found in flexible office units, including some innovation spaces. Medtech, healthtech and edtech are all growth areas which are typically found in innovation spaces, and the major health and education providers in Oxfordshire are increasingly involved in the provision of innovation spaces (e.g. the Launchpad at the Said Business School, and the Oxford Bioescalator). However, some of these sectors – notably retail and tourism - are not usually associated with specialist provision of innovative spaces for business start up and growth.

### **Trends in provision of innovation space**

- 4.8 Trends in the provision of innovation space can be seen both within Oxfordshire and more widely. Within Oxfordshire, one of the most striking findings of the survey is the recent upsurge in the provision of innovation space, including in particular co-working space of various kinds, mainly in Oxford.
- 4.9 Table 2-2 shows the large number of new spaces being planned, including some very significant new developments – notably Oxford Northern Gateway, which is envisaged as an innovation district, and the Oxford Technology Park close to the airport. This excludes proposals which are not yet at a sufficiently advanced stage to cover in this analysis (because they are not specific about what kinds of space will be created), such as the University of Oxford's plans for Osney Mead.

- 4.10 The proliferation of co-working space includes stand-alone office based and workshop based facilities (e.g. Openworks in St Clements Street, Oxford Innospace in East Oxford, the Oxford Hack Space in the basement of the Oxford Centre for Innovation), co-working space which has been created within existing office based innovation spaces (e.g. the Hub, located within the Oxford Centre for Innovation) and by firms which have spare space which they have chosen to convert to co-working spaces for start ups or collaborators (e.g. Pow Wow, within Grant Thornton's offices on Oxford Business Park, and the co-working space in the offices of Peter Brett Associates in Oxford). There are also some strategic moves by education organisations to create new innovation spaces within their facilities to promote proof of concept and business start up activities among staff or students (e.g. the Life Science Hub at Oxford Brookes University, the Oxford University Innovation Startup Incubator, the Launchpad at the Said Business School, and the innovation space planned at the Oxford Centre for Islamic Studies).
- 4.11 This activity in Oxfordshire reflects a general trend nationally and internationally to create more innovation spaces, and in more varied forms. London tends to be at the leading edge of provision of innovation spaces within the UK due to the very large number of innovative and technology based start ups there. A report completed in 2014<sup>2</sup> identified over 50 incubators, accelerators and co-working spaces, over half of which were established in the two years immediately preceding the report's publication. Two years later, in 2016, a newspaper article<sup>3</sup> claimed there are now 156 incubators or co-working spaces in London. In general – and certainly in the better locations in boroughs of the Central Activities Zone (CAZ) and CAZ fringe boroughs - space also seems to fill up quickly. A report to GLA by SQW in 2015 on science and technology clusters in London noted that in areas where innovation spaces are clustered, providers face a rapidly changing market, and the models and types of provision are changing as the level of competition and demand increases. Co-working environments are increasingly popular, and there is an increasing amount of specialist provision offering shared access to equipment, such as maker, hacker or kitchen spaces. There are now also many accelerator programmes (intensive business support programmes for entrepreneurs pre-start or in the early stages of their business) with or without linked use of co-working space.
- 4.12 The SQW report also observed that there were increasing links between innovation spaces for start ups and larger, more formally arranged grow-on space. In some cases the co-working spaces were integrated into the shared areas of the formal office space, helping businesses transition to larger units while at the same time spreading the benefits and atmosphere of shared space to the serviced office space.
- 4.13 There is a huge variety of organisations providing the innovation spaces, but SQW identified five main models of provision:
- *innovation centres linked to a university or research institution*, such as the London BioScience Innovation Centre (LBIC) which is linked to the Royal Veterinary College, and the Imperial Incubator on the university's campus in Kensington
  - *accelerator programmes*: examples include *The Bakery* focused on adtech and supported by a number of major brands (e.g. Heinz, Panasonic, BMW) and advertising

<sup>2</sup> URS (2014) Supporting Places of Work: Incubators, Accelerators and Co-working Spaces, Greater London Authority

<sup>3</sup> Business Matters (Sept 18, 2016) Accessed at: <http://www.bmmagazine.co.uk/news/chicago-chooses-london-as-best-location-out-of-us-for-business/>

agencies (e.g. Vizeum, Havas Worldwide London, Karmarama); *Level 39*, describing itself as “Europe’s largest technology accelerator space for finance, cyber-securities, retail and future cities technology companies”; *Cognicity*, established by the Canary Wharf Group to identify and accelerate the development of smart city technology products and services; and *Healthbox*, which was founded by US venture capital firm Sandbox Industries in 2012. All of these examples include a property element, although some accelerators do not and they are not primarily ‘a property solution’.

- *Innovation spaces linked to major corporates* – usually linked to the need for major corporates to understand the disruptive potential of new digital technologies on established business models. Examples include Google Campus, and Telefonica’s Wayra incubator in Bloomsbury.
- *local solutions, which are more widely located across London*, such as the Camden Collective (for very early stage creative businesses), WeWork South Bank (co-working office space), the UGLI campus (ex BBC studios) at White City, Croydon Tech City (specialist tech co-working and incubator space), and the Digital Greenwich Innovation Centre
- *Hybrid solutions*, such as IDEALondon, a joint venture between University College London, Cisco and DC Thomson, focused on digital technologies and providing co-working space for concept development and commercialisation.

4.14 Four of the most important reasons for the upsurge in the supply of different types of innovation spaces are:

- The increasing importance of co-location – despite the huge increase in the ability to communicate remotely there is, apparently paradoxically, an increased desire for face to face communication, both formal and, particularly, informal
- The increasing importance of open innovation – linked to the emphasis on co-location, the concept of open innovation is that firms can and should use external ideas as well as internal ideas, and internal and external paths to market, as they look to advance their technology<sup>4</sup>. This leads to a focus on collaborative work between firms and with research facilities to develop and commercialise new technologies and applications
- The increasing impact of younger people in the workforce – the group that has variously been dubbed “*the millennials*” / “*Generation Y*” / “*Generation Rent*” – referring to people reaching adulthood at (or after) the millennium – so now in their mid-30s or younger. Key characteristics of this group include a high level of constant connectivity through all forms of social media, and a tendency to challenge the parameters of “*work*” – including where, how and when it is done. Typically informal co-working spaces are popular, traditional workplace environments less so
- The importance of providing a continuum of business space from informal co-working at proof of concept and start up, to more formal secure space, but still on flexible terms, for more mature businesses, to larger business units on more traditional terms but still within innovative environments where bright people want to work.

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<sup>4</sup> Henry Chesbrough, Open Innovation: The New Imperative (2003)

## Geographical coverage

- 4.15 The refreshed Strategic Economic Plan for Oxfordshire states that “the main locations for housing and employment growth will be within the Oxfordshire Knowledge Spine – stretching from Bicester in the north through Oxford to Science Vale in the south (including the major research centres at Harwell, Culham, the growing towns of Didcot, Grove and Wantage, and major employment areas such as at Milton Park and Harwell). This spatial focus is reflected in the adopted and emerging Local Plans within Oxfordshire, and in the scale and location of investment in the infrastructure for research, enterprise and connectivity in the county.
- 4.16 It is not surprising, therefore, that this area also includes most of the innovation spaces in Oxfordshire, including all the major integrated science park and innovation centre facilities. The main focus of both existing and planned innovation spaces is Oxford and its immediate surrounds (including northwards to Begbroke and Kidlington), and within Science Vale (notably at Culham, Harwell and Milton Park). A new innovation centre is also planned with the NW Bicester Eco Development, to add to long established centres in Bicester and Upper Heyford.
- 4.17 Outside the Knowledge Spine there are just three innovation spaces: small innovation centres in Banbury and Witney, and the Sylva Wood Centre at Long Wittenham.

## Conclusions

- 4.18 Overall, Oxfordshire appears well served for innovation spaces, particularly Oxford and Science Vale. There are also existing or planned innovation spaces suitable for firms in all of the key sectors identified by the LEP. For example, the planned bioescalator and a small shared laboratory facility at the long established Cherwell Innovation Centre serve the bioscience cluster; the recently expanded innovation centre at Begbroke and the new and planned innovation spaces at Harwell are suitable for a variety of engineering related activities. Increasingly, innovation spaces are being designed as flexible buildings with floor to ceiling heights and servicing that can accommodate a range of office, workshop or laboratory uses, depending on demand.
- 4.19 However, the high occupancy rates in most existing innovation spaces, and evidence of waiting lists, demonstrate that there is high demand and the strength of the economy suggests that demand will continue to grow. Based on consultations undertaken as part of this study, in addition to the feedback from the survey, there will continue to be some gaps in provision even after all of the planned innovation spaces are completed. These gaps include:
- A limited amount of wet laboratory space for bioscience firms, even after completion of the bioescalator
  - A limited amount of purpose designed workshop space, as opposed to offices which can be used as workshops. This is important given the growth prospects for engineering related activities in Oxfordshire
  - A shortage of innovation space in central Oxford in relation to high levels of demand
  - A relatively small amount of innovation space in the northern and western parts of Oxfordshire, particularly in the northern part of the Knowledge Spine

- A shortage of growth space to enable firms to graduate from innovation spaces and enable more new firms to benefit from the supportive environments they provide.

4.20 Some of these gaps may be partly or completely filled by projects which are proposed but not yet sufficiently specified to include in this study. These include: the Oxford Northern Gateway, which could help address the shortage of space in the northern part of the Knowledge Spine, including additional laboratory space; the Oxpens/Osney Mead proposals which could address the shortage of innovation space in the city centre; the development at Harwell Campus, which could address a range of demands; and the proposed development of a garden settlement at Eynsham, which may include innovation space.

## 5. Possible measures to fill gaps

- 5.1 The survey respondents identified various gaps in provision of innovation spaces in Oxfordshire, and ways in which Oxfordshire LEP could in future most effectively support the most appropriate provision of space and supporting services. There are also lessons to be drawn from elsewhere on the best ways to support the formation and growth of innovative new and small companies.
- 5.2 The shortages of various kinds of space, even in the light of planned developments, were considered in the previous chapter. In addition, it is clear from the survey that the availability of business and innovation support, including access to specialist funding and advice, could be improved, particularly for those innovation spaces not linked to large innovative organisations. This could potentially add a great deal of value to the current offer, at relatively modest cost (compared, for example, to funding new innovation spaces). The key gaps are summarised in Table 5-1.

**Table 5-1: Summary of key gaps in supply of innovation spaces and related ‘soft’ support**

**Overall**

- A shortage of grow on space to enable firms to graduate from innovation spaces and free up space for new entrants
- Limited resources in most spaces to provide business and innovation support

**Sector gaps**

- Not enough wet lab space for bioscience firms, even after completion of the bioescalator
- Not enough purpose designed workshop space, as opposed to offices which can be used as workshops

**Geographical gaps**

- A shortage of innovation space in central Oxford in relation to high levels of demand
- Little provision in the north and west of the county relative to the amount of growth planned there

*Source:*

- 5.3 One way to address some of these shortages is to build on the current provision of science parks by creating more innovation districts in few priority locations. These include the Oxpens/Osney Mead area, the Oxford Northern Gateway, Begbroke, Harwell and Culham. The large scale science parks and innovation districts in the county offer the best opportunity for firms to benefit from economies of scale in the provision of supporting business and technology services – particularly where they are linked to major research based institutions – and from the range of premises and terms available (meaning they are likely to be able to grow within the Park rather than have to move elsewhere to find more space),
- 5.4 Some of these developments may not need public sector support, but others may do: particularly to provide specialist facilities such as laboratory space and equipment, or in some cases to provide space for small firms on flexible terms (the current problem appears to be mainly grow-on rather than co-working or incubator space).
- 5.5 In any case it is important that public sector intervention – whether the LEP, local authorities or other publicly funded bodies – is focused on overcoming market failures, and does not create market distortions which can undermine provision by private or charitable organisations.

5.6 There are four main source of funding for innovation spaces, all of which Oxfordshire has benefitted from in the past, and should continue to play important roles in future:

- The private sector: the private sector is increasingly inclined to provide innovation space in Oxfordshire, particularly in prime locations such as Oxford city centre. Oxford Innovation (which was originally part of The Oxford Trust but is now an independent, commercial business), is the largest and longest established operator of innovation space in the county, and now one of the largest in the country. Oxford is also beginning to see interest from national specialist providers of co-working space and/or accelerator programmes which see opportunities in the Oxfordshire market (for example, Wayra UK, part of the Telefonica Open Future network of start-up accelerators, has collaborated with Oxford University to create the Oxford University Innovation Startup Incubator. Bethnal Green Ventures and Biostars are also now advertising accelerator programmes to Oxfordshire firms). There are also firms like Grant Thornton and Peter Brett Associates which have seen an opportunity to promote their surplus office space for co-working, at least on a short term basis
- The public sector: Oxfordshire LEP and partners were successful in securing significant funding for innovation spaces in recent years through the Oxfordshire City Deal, including for the bioescalator, and expanded or new innovation centres at Begbroke, Culham and Harwell. Cherwell Council also received significant funding for the innovation centre at NW Bicester through the Government's now defunct Eco Towns fund. On a smaller scale, Oxford City Council has also recently made available some surplus offices in the city centre for use as innovation space.

Outside Oxfordshire, there are numerous examples of public sector organisations putting together funding packages to enable the development of new innovation spaces. Although the public sector is under intense financial pressure, the cost of borrowing is currently very low and some organisations have surplus space which could be converted for use by new and small businesses. Well planned, professionally managed innovation spaces can provide a good return on investment, both in financial and economic development terms.

- The universities and colleges: both universities in Oxford are supporting the creation of innovation spaces, both through conversion of existing space (e.g. the Life Science Hub at Oxford Brookes University) and new build (e.g. the bioescalator on the Old Road campus). In addition, some Oxford Colleges are also active in providing innovation space: notably Magdalen College, which is a JV partner in Oxford Science Park, and St John's College which is promoting the Northern Gateway scheme.
- The third sector: The Oxford Trust has been active for many years in providing innovation spaces in Oxfordshire, and continues to implement new proposals, including the Hack Space in the basement of OCFI and the new innovation space (the Wood Centre) at Stansfeld Park in Headington. Other third sector organisations involved in providing innovation spaces include as the Sylva Foundation, which has created the Wood Centre at Long Wittenham, and Oxford Wood Recycling, a social enterprise.

5.7 It is important that there is collaboration between the different parties (as is evident in Oxford from the existence of the informal 'Start up and Grow on Group' convened by the City Council), to ensure roles, objectives, opportunities and restrictions are fully understood, and resources are used most efficiently and effectively to deliver innovation spaces and related support to meet different types of demand. In particular, we recommend that:

- The public sector investigates innovative ways to fund innovation spaces, drawing on experience from elsewhere, and working with private sector partners where appropriate
- Care is taken to avoid crowding out of private and third sector initiatives by inadvertently distorting the market for innovation support
- A clear justification for public sector intervention is established, based on market failures which leave gaps in supply, but also on the returns on investment that can be achieved – measured in economic and social as well as purely financial terms
- Efforts are made to link private sector providers of business, innovation and financial support with the operators of innovation spaces, particularly those where the internal provision of support is financially constrained
- Creative use is made of different sources of funding to supplement the support provided by private sector services, again filling gaps in supply rather than duplicating existing expertise available through private sector sources.

## Annex A: Consultees

**Table A-1: List of consultees**

<b>Person</b>	<b>Position</b>	<b>Organisation</b>
Steve Burgess	Chief Executive	The Oxford Trust
Angus Horner	Director	Harwell Campus
Dr Caroline Livingstone	Head of Property	Culham Science Centre
Steve Moss	Head of Property	UK Atomic Energy Authority
Matthew Peachey	Economic Development Manager	Oxford City Council
Dr Nick Scott Ram	Director of Commercial Development	Oxford Academic Health Science Network
Leah Thompson	Knowledge Exchange and Impact Team	University of Oxford
John Vandore	Manager, Cryox	STFC Harwell
Jo Willett	Marketing & Business Development Director	Oxford Innovation
David Williams	Partner	Business Space Agency

Note: Consultations involved telephone interviews. These consultees were in addition to the people contacted to complete the survey

## Annex B: Survey questionnaires

### Oxfordshire Innovation Spaces - Existing

#### 1.

Our working definition of "innovation spaces" is as follows: Innovation spaces provide entrepreneurs and businesses with accommodation on flexible terms and access to supporting administrative, business and innovation support services and networks.

The following questions are intended to provide information which can help Oxfordshire LEP, in collaboration with others, to improve the supply of innovation spaces in Oxfordshire to better match needs. These needs may relate to the type, location or size of space, or to the availability of supporting services and/or facilities.

Please answer as many of the following questions as you are able and willing to. They are in two categories: non-confidential, in which we propose to make the answers for each innovation space available to our client (Oxfordshire LEP) and all respondents; and confidential answers which we will use in aggregate only, and for which information on individual innovation spaces will not be disclosed, either to the clients or any other organisations.

If you are willing to answer some questions in the 'non-confidential' section only if they are kept confidential, please indicate which.

#### 2. Non-confidential section

1. What is the name of your innovation space?

2. Please provide the name of the organisation which owns the innovation space.

3. Please provide the name of the organisation which manages the innovation space.

4. Is the space expected to be in operation permanently (for five years or more) or short-term (less than five years)?

In operation

**5. Please select the main type of space you provide.**

Space

Comments:

**6. In addition to the answer to question 8, do you also provide other types of space? If so, please choose as many options as are applicable.**

- Innovation or incubator centre providing self contained offices
- Innovation or incubator centre providing self contained workshops
- Innovation or incubator centre providing self contained laboratories
- Co-working office space
- Co-working workshop space
- Co-working laboratory space
- Accelerator programme with space provided
- Science park
- Other - please specify

Other:

**7. What is the total size of your innovation space? Please provide your answer as a number in sqm.**

**8. What is your net lettable area? Please provide your answer as a number in sqm.**

**9. Is there a virtual service offering for firms/entrepreneurs who don't rent space in the facility?**

Options

Virtual service offering

**10. What download and upload speeds are available? Please provide numbers in Mbps.**

Download speed

Upload speed

**11. Does your innovation space offering include access to any specialist equipment?**

Choices

Specialist equipment

**12. Please list what specialist equipment you offer access to.**



**13. Is there a formal gateway (access policy) for entrepreneurs/businesses wanting to occupy space in your facility?**

Formal gateway policy

Options

**14. What is the number of discrete business units in your innovation space? Please provide a number.**

**15. What is the number of hot desks in your innovation space? Please provide a number.**

**16. What is the number of full-time equivalent employees providing administrative support at your innovation space? Please provide a number.**

**17. What is the number of full-time equivalent employees providing innovation/business support at your innovation space? Please provide a number.**

**18. Is your facility formally linked to one or more innovation organisations (e.g. university, college)?**

Link to innovation organisations

Options

**19. If so, please list below the innovation organisations to which your facility is formally linked.**

**20. Is your innovation space linked to any specialist funding sources such as venture capital or grants?**

Specialist funding sources

Options

**21. If so, please list below the specialist funding sources your innovation space is linked to.**

**22. Is your facility part of a bigger science park or similar property scheme which facilitates graduation by businesses into larger space?**

Part of a property scheme

Options

**23. Have you got firm plans for improvements to the current offer? If so, please describe briefly what those plans consist of and when they may be implemented.**

**24. Is there any other information you would like to add concerning the characteristics of the innovation space or services you provide which is not covered by the above questions?**

**25. In your view, are there any particular gaps in the provision of innovation space and related services in Oxfordshire (these could relate to types of space, types of services, location, specialist facilities for particular sectors, etc.)? If so, please summarise below what they are.**

**26. How do you think the Local Enterprise Partnership and its partners could best improve the quantity and quality of innovation spaces in Oxfordshire? Please briefly describe below.**

**27. Are there any questions in this 'non-confidential' section which you are only willing to answer if the answer is not disclosed to the client or any other organisation except in aggregate form, and in which individual innovation spaces cannot be identified? Please list question numbers.**

## 4. Confidential Section

**28. Is there a formal graduation policy or fixed term for occupancy of your space?**

Formal graduation policy or  
fixed term

Options

**29. What has been the average occupancy rate over the last 6 months? Please provide a percentage.**

**30. Do you have a waiting list, or know of firms which want to take space in your facility but cannot?**

Waiting list

Options

**31. If so, roughly how many firms/entrepreneurs are on the list/awaiting the availability of space?**

**32. In a typical year what proportion of your net lettable space is likely to become vacant?**

**33. What are your current charges for space? Please specify whether charges are per sqm or by desk etc.**

**34. What is the number of entrepreneurs receiving one-to-one business support (coaching, access to finance etc.) in your innovation space over the last six months? Please provide a number below.**

**35. What is the number of networking events held in your innovation space over the last six months? Please provide a number below.**

**36. What are the total attendance figures at networking events held in the innovation space over the last six months? Please provide a number below.**

**37. Do you have any evidence about the performance of businesses which have occupied space in your facility or used your support services (e.g. survival and**

**growth rates during the stay, and after moving out)? If so, please could you summarise below very briefly your key findings or provide a link to relevant data?**



# Oxfordshire Innovation Spaces - Planned

## 1.

Our working definition of "innovation spaces" is as follows: Innovation spaces provide entrepreneurs and businesses with accommodation on flexible terms and access to supporting administrative, business and innovation support services and networks.

The following questions are intended to provide information which can help Oxfordshire LEP, in collaboration with others, to improve the supply of innovation spaces in Oxfordshire to better match needs. These needs may relate to the type, location or size of space, or to the availability of supporting services and/or facilities.

Please answer as many of the following questions as you are able and willing to. They are in two categories: non-confidential, in which we propose to make the answers for each innovation space available to our client (Oxfordshire LEP) and all respondents; and confidential answers which we will use in aggregate only, and for which information on individual innovation spaces will not be disclosed, either to the clients or any other organisations.

If you are willing to answer some questions in the 'non-confidential' section only if they are kept confidential, please indicate which.

## 2. Non-confidential section

1. What is the name of your planned innovation space?

2. Please provide the name of the organisation which owns the planned innovation space.

3. Please provide the name of the organisation which will manage the planned innovation space.

4. When do you expect your innovation space to be up and running?

**5. What stage of development of the innovation space are you currently at?**

**6. Is the planned space expected to be in operation permanently (for five years or more) or short-term (less than five years)?**

In operation Duration

**7. Please select the main type of space you will provide.**

Space Types

Comments:

**8. In addition to the answer to question 8, will you also provide other types of space? If so, please choose as many options as are applicable.**

- Innovation or incubator centre providing self contained offices
- Innovation or incubator centre providing self contained workshops
- Innovation or incubator centre providing self contained laboratories
- Co-working office space
- Co-working workshop space
- Co-working laboratory space
- Accelerator programme with space provided
- Science park
- Other - please specify

Other:

**9. What is the total size of your planned innovation space? Please provide your answer as a number in sqm.**

**10. What will be your net lettable area? Please provide your answer as a number in sqm.**

**11. Will there be a virtual service offering for firms/entrepreneurs who don't rent space in the facility?**

Options

Virtual service offering

**12. Will your planned innovation space offering include access to any specialist equipment?**

Choices

Specialist equipment

**13. Please list what specialist equipment you will offer access to (if available).**

**14. Will there be a formal gateway (access policy) for entrepreneurs/businesses wanting to occupy space in your facility?**

Options

Formal gateway policy

**15. What will be the number of full-time equivalent employees providing administrative support at your innovation space? Please provide a number (if available).**

**16. What will be the number of full-time equivalent employees providing innovation/business support at your innovation space? Please provide a number (if available).**

**17. Will your facility be formally linked to one or more innovation organisations (e.g. university, college)?**

Options

Link to innovation organisations

**18. If so, please list below the innovation organisations to which your facility will be formally linked.**

**19. Will your innovation space be linked to any specialist funding sources such as venture capital or grants?**

Specialist funding sources

Options

**20. If so, please list below the specialist funding sources your innovation space will be linked to.**

**21. Will your facility be part of a bigger science park or similar property scheme which facilitates graduation by businesses into larger space?**

Part of a property scheme

Options

**22. Is there any other information you would like to add concerning the characteristics of the innovation space or services you will provide which is not covered by the above questions?**

**23. In your view, are there any particular gaps in the provision of innovation space and related services in Oxfordshire (these could relate to types of space, types of services, location, specialist facilities for particular sectors, etc.)? If so, please summarise below what they are.**

**24. How do you think the Local Enterprise Partnership and its partners could best improve the quantity and quality of innovation spaces in Oxfordshire? Please briefly describe below.**

**25. Are there any questions in this 'non-confidential' section which you are only willing to answer if the answer is not disclosed to the client or any other organisation except in aggregate form, and in which individual innovation spaces cannot be identified? Please list question numbers.**

## 4. Confidential Section

**26. Will there be a formal graduation policy or fixed term for occupancy of your space?**

Formal graduation policy or  
fixed term

Options

**27. Do you have a waiting list of firms which want to take space in your facility?**

Waiting list

Options

**28. If so, roughly how many firms/entrepreneurs are on the list?**