

# ODS Economic Impact Assessment 2023/24

## Final Report



# Contents

Executive Summary ..... i

1. Introduction ..... 1

2. Local socioeconomic context..... 3

3. Quantifying the economic impacts of ODS..... 10

4. Wider socioeconomic impacts of ODS.....20

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# ODS Economic Impact Assessment

2023/24



1,154

Total jobs supported by ODS activities, including 728 jobs supported in Oxford.

£65.6m

Total GVA impact generated by ODS in the UK, including £43.6m GVA impact in Oxford.



560

People employed by ODS, with 54% based in Oxford and 35% based in the rest of Oxfordshire



£75.1m

Turnover generated by ODS activities



£35.3m

spent with UK businesses.

This generates

£20.3m

in indirect GVA, and supports

311 jobs

across the UK.



£31.1m

employment costs and

£20.3m

in wages and salaries.

This generates

£10.2m

in induced GVA, and supports

283 jobs

in the UK.

ODS places 'doing good' at the centre of its activities. In 2023/24, the company:



committed to the Menopause Pledge and Armed Forces Covenant, and was accredited as a Disability Confident Leader



signed the Oxfordshire Inclusive Economy Partnership Charter



reduced emissions by 63% (relative to 2014/15)



employed 15 Oxford-based apprentices



partnered with and supported several charities through their Volunteering Bank



converted 32% of the company fleet to electric vehicles, supporting the transition to cleaner energy

# Executive Summary

1. In December 2024, ODS commissioned SQW to undertake an economic impact assessment of its services and activities in Oxford and Oxfordshire. This report presents the findings of this assessment.
2. ODS was established in 2012 to deliver direct services to the public on behalf of Oxford City Council and offer commercial services to local businesses and organisations. In 2018, ODS separated into two trading companies; ODS Limited (ODSL), which provides statutory services to Oxford and maintains Oxford City Council's housing stock, and ODS Trading Limited (ODSTL), which is a commercial entity providing a similar range of services to a range of organisations in the local area.
3. ODS provides specialist services around total waste management, grounds maintenance, property management, highways maintenance, and fleet maintenance. The Group's strategy is centred around delivering excellent value-for-money public services, and generating profit, which is reinvested back into public services.

## Local socioeconomic context

4. The Oxford economy is underpinned by nationally and internationally significant anchor institutions, including the University of Oxford, Oxford Brookes University, Oxford Science Park, Oxford Business Park, John Radcliffe Hospital, and MINI Plant. Reflecting the economic strengths of the area, Oxford City has continued to grow rapidly over the last five years, with GVA growing 22% from 2019 to 2024, nine percentage points higher than the UK.
5. In 2023, 125,800 employees were estimated to be working in businesses based in Oxford, making up nearly a third of 392,500 jobs in Oxfordshire. However, unemployment in the City was 6.3%, much higher than in Oxfordshire (2.3%) and the UK (3.7%).
6. Despite positive economic performance across Oxford, 10 of 83 neighbourhood areas in Oxford are among 20% of the most deprived in England. Recognising this challenge, Oxford City Council highlighted making a more inclusive economy as one of its key priorities in their economic strategy for 2022-2032.
7. ODS provides several key services to a range of organisations in the city and the wider region, enabling them to operate efficiently and to a higher capacity. As one of the 45 large employers in the city, ODS provides a wide range of occupations, including professional roles, elementary trades, and transport operatives.

## Economic impact of ODS

8. The economic impact of ODS can be understood in terms of its direct effects, and how the company's activity creates demand elsewhere in the UK economy through indirect and induced effects.
  - **Direct effects:** The number of people employed by ODS and the consequent Gross Value Added (GVA).
  - **Indirect effects:** Positive effect of the goods and services purchased by ODS from other UK companies – these purchases lead to subsequent increases in demand on its suppliers, and so on.
  - **Induced effects:** Effect on the wider economy of the spending derived from wages and salaries and other supply chain businesses.
9. In 2023/24, ODS directly employed 560 people and generated GVA of £35.1m. Of the 560 employees, 54% live in Oxford, 35% live in the rest of Oxfordshire, and the remaining 11% live in the rest of the UK.
10. In the same period, ODS spent £35.3m with suppliers in the UK including £9.9m (28%) spent in Oxford and £10.3m (29%) in the rest of Oxfordshire. Based on this expenditure, the indirect GVA impact of ODS across the UK is £20.3m, with £10.5m generated in Oxfordshire and £5.2m in Oxford. This supports 311 jobs across the UK, including 70 in Oxford and 80 in the rest of Oxfordshire.
11. ODS generates further effects through the wages and salaries paid to employees, a proportion of which will then be spent in the local and regional economies. In 2023/24, total employment costs for the company were £31.1m, which includes £20.9m in basic salaries. The total induced GVA generated by ODS in the UK is estimated to be £10.2m, with £5.4m generated in Oxfordshire and £3.2m in Oxford. This induced GVA supports 283 jobs in the UK, 166 of which are based in Oxfordshire and 99 in Oxford.
12. **In 2023/24, ODS had a total GVA impact of £65.6m in the UK, £51.0m in Oxfordshire and £43.6m in Oxford. In the same period, ODS activities supported a total of 1,154 jobs in the UK, 876 of which were in Oxfordshire and 728 in Oxford.**

## Wider socioeconomic impact of ODS

13. ODS places 'doing good' at the centre of its activities. The company's approach to social value and sustainability practices is based on four key pillars – workforce, community, environment, and supply chain.

## Workforce support and development

14. ODS has recently made significant commitments to support inclusivity within its workforce. This includes signing the Menopause Pledge and Armed Forces Covenant, and gaining accreditation as a Disability Confident Leader.
15. According to the ODS ED&I report 2024, the mean gender pay gap was -15.5%, showing that women on average earn more than men in the company. The report also highlights that there was no disability pay gap (based on partial data), but acknowledges there is further work to do in terms of addressing the ethnicity pay gap.
16. ODS has a number of initiatives to support workforce development and wellbeing. This includes an Employee Assistance programme and access to the Blink platform, which has improved communication across the company, access to trained Mental Health First Aiders in the company, and opportunities for continuous development.
17. Similarly, ODS invests significantly in its Apprenticeship Programme. As of March 2025, the company was supporting 15 Oxford-based apprentices in a range of roles in the company. Of these, 73% were aged 21 and below.

## Community partnership and engagement

18. To reaffirm its commitment to building a more inclusive local economy, ODS signed the Oxfordshire Inclusive Economy Partnership Charter in January 2023. The charter helps organisations to embed social value into its operations to improve the lives of Oxfordshire residents.
19. ODS has also taken significant actions to support people with convictions in gaining employment, working in partnership with the local prison HMP Bullingdon and joining Clean Sheet. ODS currently employs a prisoner from the Spring Hill open prison.
20. ODS has partnered with a range of local and national charities and organisations, including Cancer Research UK, Larkrise Primary School, Asylum Welcome, Barracks Lane Community Garden, the Oxford Hub, and the Oxford Food Hub. ODS also provides employees the opportunity to volunteer with their chosen charity through the ODS Volunteering Bank. The company's charitable activities have been recognised by the Local Authority Recycling Advisory Committee (LARAC) Awards 2023, where ODS was shortlisted for two awards.

## Environmental sustainability

- 21.** ODS is committed to international standards and certifications around environmental sustainability, including the ISO 14001 and the PAS2030 Decarbonisation Retrofit Installer status. The company also tracks its Scope 1 and Scope 3 carbon emissions. Since 2014/15, ODS has reduced its carbon emissions by 63%.
- 22.** ODS has upgraded its fleet to aid its transition to cleaner energy. As of 2023/24, 32% of the ODS fleet is electric. The company has also added six electronically assisted bikes to its fleet to reduce sole occupancy journeys.
- 23.** ODS supports biodiversity through the maintenance of 900 acres of parks and countryside. In addition, ODS engages with the local community to encourage more sustainable waste management by delivering initiatives such as the Podback Recycling Scheme and the Waste Education Programme.
- 24.** ODS' Carbon Management Plan includes further actions to reduce the company's emissions and achieve net zero. These include installation of more solar technology across the estate, decarbonising buildings, and raising awareness among staff about the benefits and opportunities to reduce its emissions.



# 1. Introduction

- 1.1** In December 2024, ODS commissioned SQW to undertake an economic impact assessment of its services and activities in Oxford and Oxfordshire. This report presents the findings of this assessment.

## Overview of ODS

- 1.2** Oxford Direct Services (ODS) was established in 2012 to deliver direct services to the public on behalf of Oxford City Council (OCC) and offer commercial services to local businesses and organisations. In 2018, ODS separated into two local authority trading companies, both of which remain wholly owned by the public sector. These two companies, which are both wholly owned and controlled by OCC, are:

- **ODS Limited (ODSL):** provides statutory services to Oxford and maintains Oxford City Council's social housing stock.
- **ODS Trading Limited (ODSTL):** is an entirely commercial entity and provides a similar range of services provided by ODSL to businesses, public sector bodies, and not-for-profit organisations across the Thames Valley.

- 1.3** ODS provides specialist services in the following areas:

- **Environment:** ODS provides Total Waste Management solutions to over 1,400 businesses and 60,000 households in and around Oxford. The company also provides waste consultancy and account management to help clients reduce waste, improve recycling, minimise waste to landfill, and achieve significant cost savings.
- **Grounds maintenance and cleansing services:** This includes initial design, ad-hoc constructions, soft or hard landscaping, and scheduled maintenance programmes for Oxfordshire businesses.
- **Property management and maintenance solutions:** ODS provides a range of property services in building construction, maintenance, refurbishments, and repairs. This activity includes electrical and gas repairs and servicing, heating upgrades, kitchen and bathroom replacements, decarbonisation and retrofit works and refurbishments and extensions.
- **Highways maintenance and management:** ODS maintains 267 miles of streets and towpaths in Oxford. Maintenance services it provides include resurfacing, marking and signage manufacture and installation, drainage management and the installation of EV charging points.



- **Fleet maintenance:** ODS provides tailored services to maintain corporate fleets, including MOT testing for class 4, 5, and 7 vehicles, and specialised servicing, including for hybrid and EVs.

**1.4** The Group's strategy centres on delivering excellent, value-for-money public services, and generating profit, which is reinvested back into public services.

## Approach and methodology

**1.5** The study was carried out between January and March 2025 and involved the following research tasks:

- **ODS company data collection** – SQW provided templates to ODS to complete with overall company performance data, supplier expenditure and workforce data.
- **Desk-based review of contextual data** – this included socio-economic data on the local and regional economies.
- **Developing the economic impact model** - drawing on a variety of primary data provided by ODS and secondary data from government sources.
- **A review of wider ODS impacts** – reviewing the company's activities around community engagement, social value and sustainability.

**1.6** The remainder of this report is structured as follows:

- Chapter 2 provides a brief overview of the local area, highlighting key socio-economic characteristics of Oxford and Oxfordshire.
- Chapter 3 presents the findings from the economic impact assessment.
- Chapter 4 provides a qualitative overview of the wider-socioeconomic impacts of ODS, highlighting the company's initiatives around community engagement, social value and sustainability.

## 2. Local socioeconomic context

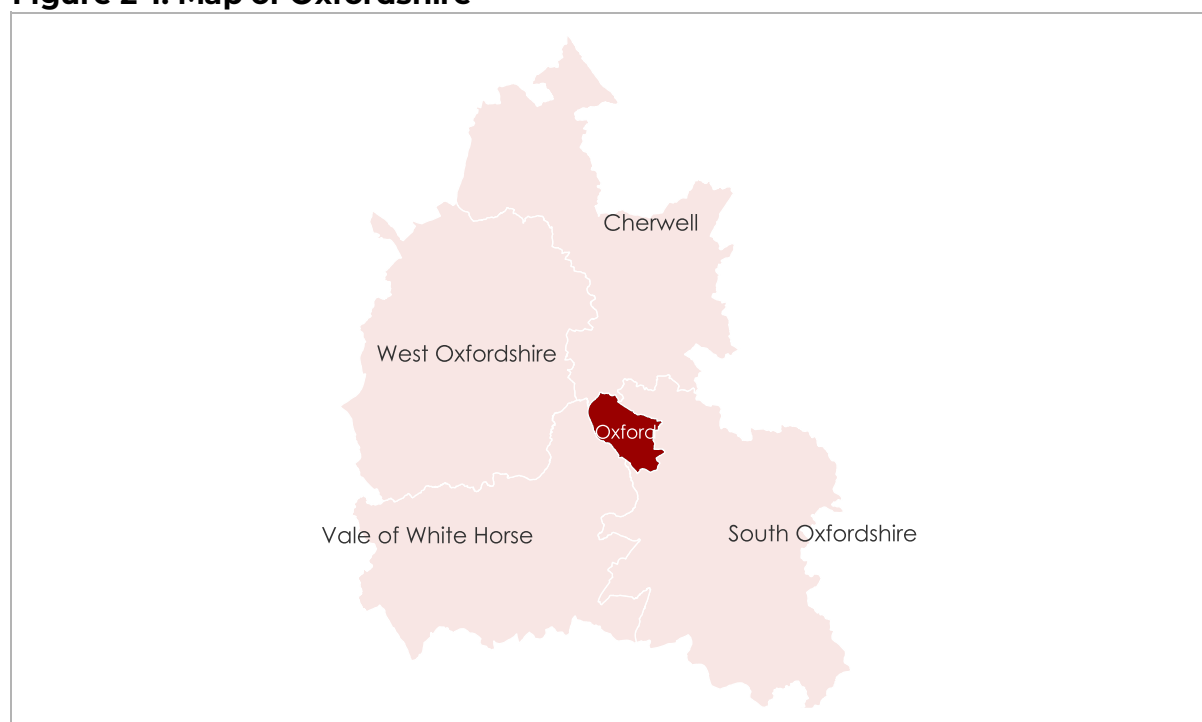
**2.1** Before looking at the scale and impact of ODS it is important to consider the characteristics of the local and regional economy. This section summarises key trends in terms of population, economic growth, business activity, employment, labour market and skills.

### Introduction

**2.2** For the purpose of this study, we have defined the “local economy” using three areas, namely:

- **Oxford:** Oxford City Council area
- **Oxfordshire:** covering the City of Oxford, Cherwell, South Oxfordshire, West Oxfordshire, and Vale of White Horse
- **The UK**

**Figure 2-1: Map of Oxfordshire**



*Source: SQW (Made using QGIS)*

**2.3** In 2023, the population in Oxford was estimated to be around 165,184, accounting for over a fifth (22.0%) of the population in Oxfordshire. From 2019 to 2023, the population in Oxford grew by 3%, which was less than population growth in the rest of Oxfordshire (6%) but greater than population growth in the UK as a whole (1%).

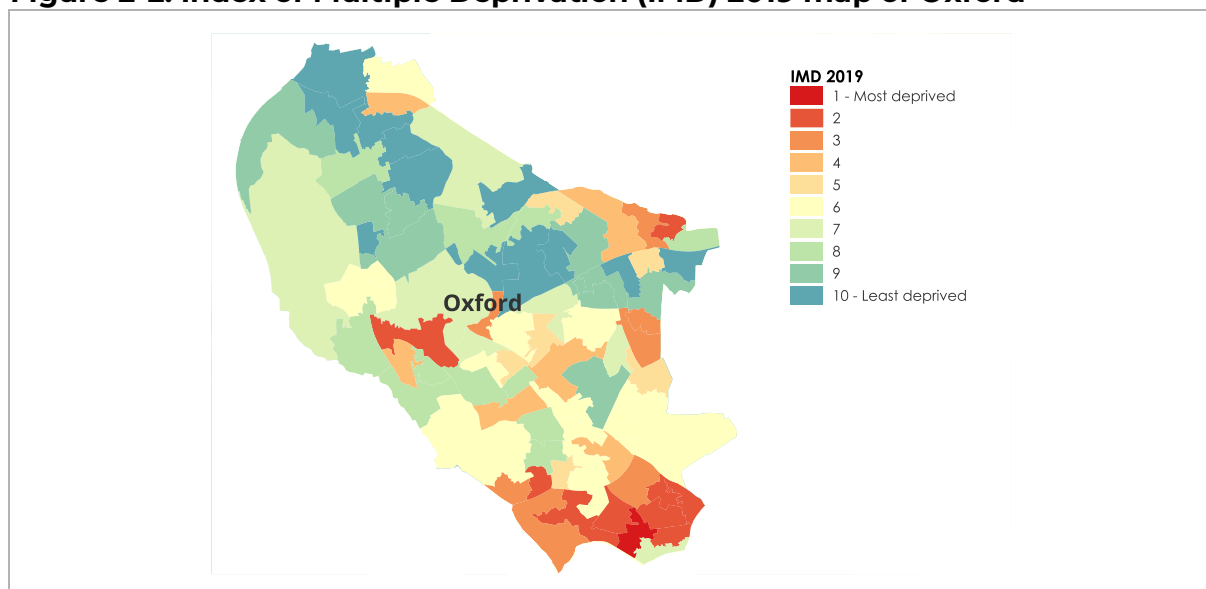
## Economic growth

- 2.4** The Oxford economy is underpinned by nationally and internationally significant anchor institutions including the University of Oxford, Oxford Brookes University, Oxford Science Park, Oxford Business Park, John Radcliffe Hospital and MINI Plant<sup>1</sup>. The city is part of the Oxford-Cambridge Growth Corridor, which has been promoted by successive UK Governments for the opportunities to grow world leading science and technology firms in life sciences, manufacturing, and AI.<sup>2</sup>
- 2.5** Recent trends have reflected the economic strengths of the area. In 2022, Oxford contributed £8.4bn Gross Value Added (GVA) to the UK economy, 22% more than in 2019. Similarly, GVA in Oxfordshire grew by 20% to £28.2bn in 2022. GVA growth for both Oxford and Oxfordshire were significantly higher than the UK as a whole, which saw GVA growth of 13% in the same time period from 2019 to 2022.

## Local deprivation

- 2.6** Despite the positive economic performance across Oxford, 10 of 83 neighbourhood areas in Oxford are among 20% of the most deprived in England across multiple indices of deprivation, including low skills, low incomes, and relatively high levels of crime. Figure 2-2 shows a map of the Multiple Deprivation Index in Oxford, illustrating the inequality for some parts of the city. Recognising this challenge, Oxford City Council highlighted making a more inclusive economy as one of its key priorities in their economic strategy for 2022-2032.<sup>3</sup>

**Figure 2-2: Index of Multiple Deprivation (IMD) 2019 map of Oxford**



<sup>1</sup> Oxford City Council (2021) *Oxford's Economic Strategy 2022-32*

<sup>2</sup> BBC News (2025) [Oxbridge growth corridor 'to add £78bn to economy'](#)

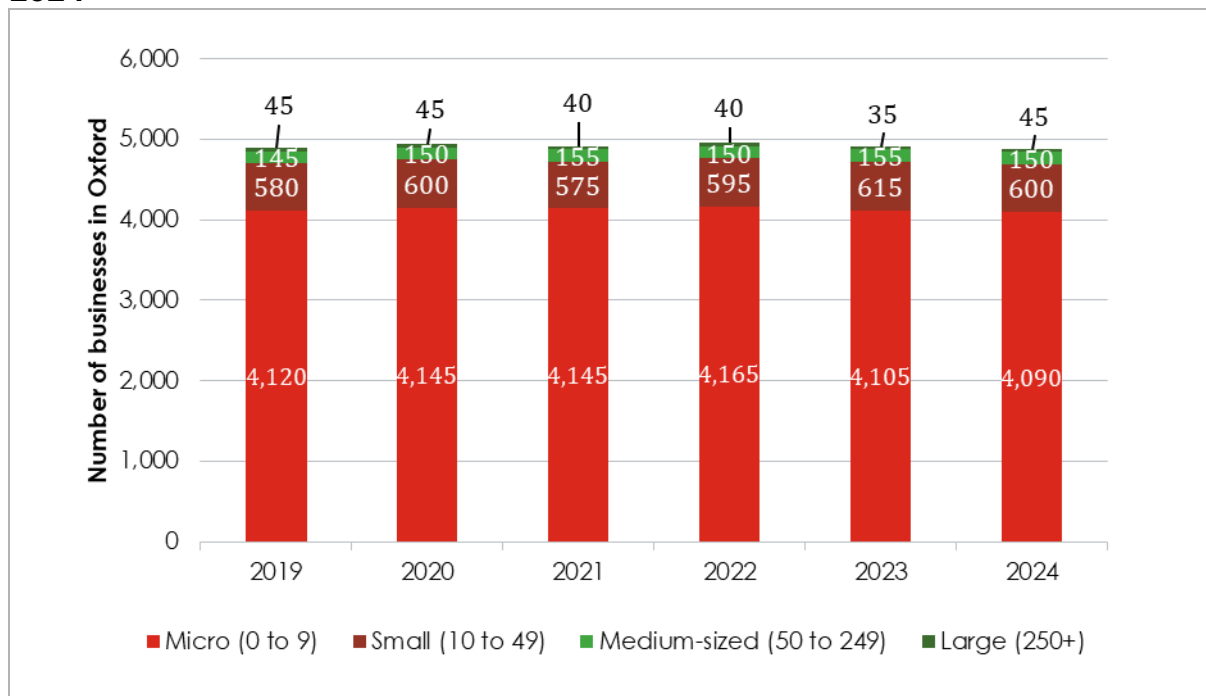
<sup>3</sup> Oxford City Council (2021) *Oxford's Economic Strategy 2022-32*

Source: SQW (Made using QGIS) using 2019 Index of Multiple Deprivation (IMD) data

## Business activity

- 2.7** Since the Covid-19 pandemic, there has been a slowdown in the business births in Oxford. In 2023, the estimated number of business births per 10,000 people was 30.87, 23% lower than the same figure in 2019. However, this decrease broadly aligns with trends in Oxfordshire and nationally, where business births have similarly decreased by 22% and 20%, respectively.
- 2.8** In 2024, 4,885 businesses were registered in Oxford, 0.1% less compared to 2019. The number of businesses in Oxford makes up about 15% of businesses in Oxfordshire. Of these, about 96% were micro or small businesses, 3.1% were medium businesses, and 0.9% were large businesses (Figure 2-3). Compared with Oxfordshire, there is a higher proportion of medium and large businesses in Oxford.
- 2.9** In 2024, over a fifth (22%) of businesses in Oxford were Professional, Scientific, and Technical businesses, compared to only 15% nationally. 11% of businesses were in ICT, 9% in Accommodation and Food Services, 9% in Arts, Entertainment and Recreation, and 8% were in Business Administration and Support Services.

**Figure 2-3: Number of businesses in Oxford, by employment size band, 2019-2024**

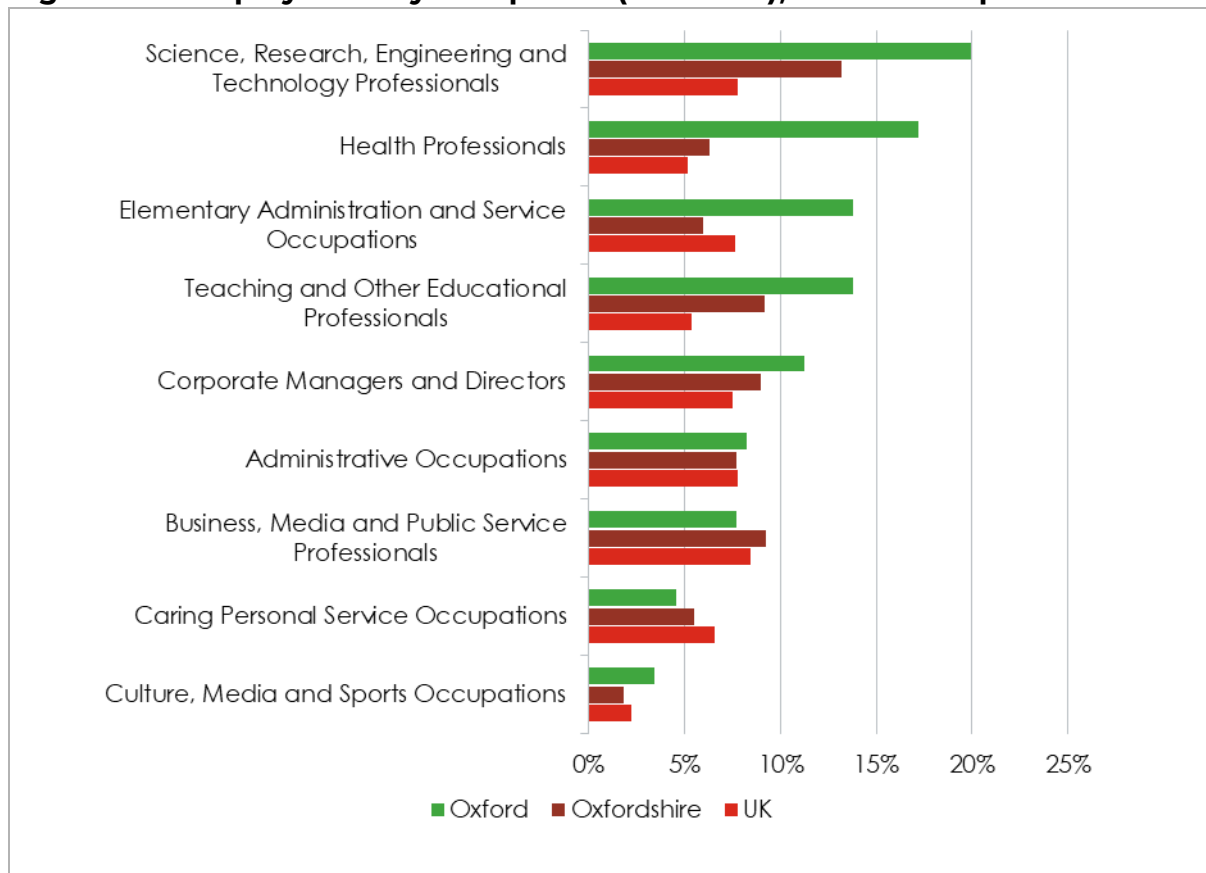


Source: SQW analysis of UK Business Counts – enterprises by industry and employment size band

## Employment

- 2.10** In 2023, 125,800 people were estimated to be working in businesses based in Oxford, making up nearly a third (32%) of the 392,500 jobs in Oxfordshire. The largest employer in the city was the education sector, which provided 30.2% of employment in the city. This was followed by human health and social work activities (19.8%) and information and communication (8.7%).
- 2.11** Reflecting the large employers in the region, a fifth of employees who live in Oxford (20%) work in science, research, engineering and technology professional roles. Similarly, 17% are health professionals, 14% work in elementary administration and service roles, and another 14% work in teaching and other educational professions (Figure 2-4).

**Figure 2-4: Employment by occupation (SOC2020), Oct 2023-Sep 2024**



Source: SQW analysis of ONS Annual Population Survey data

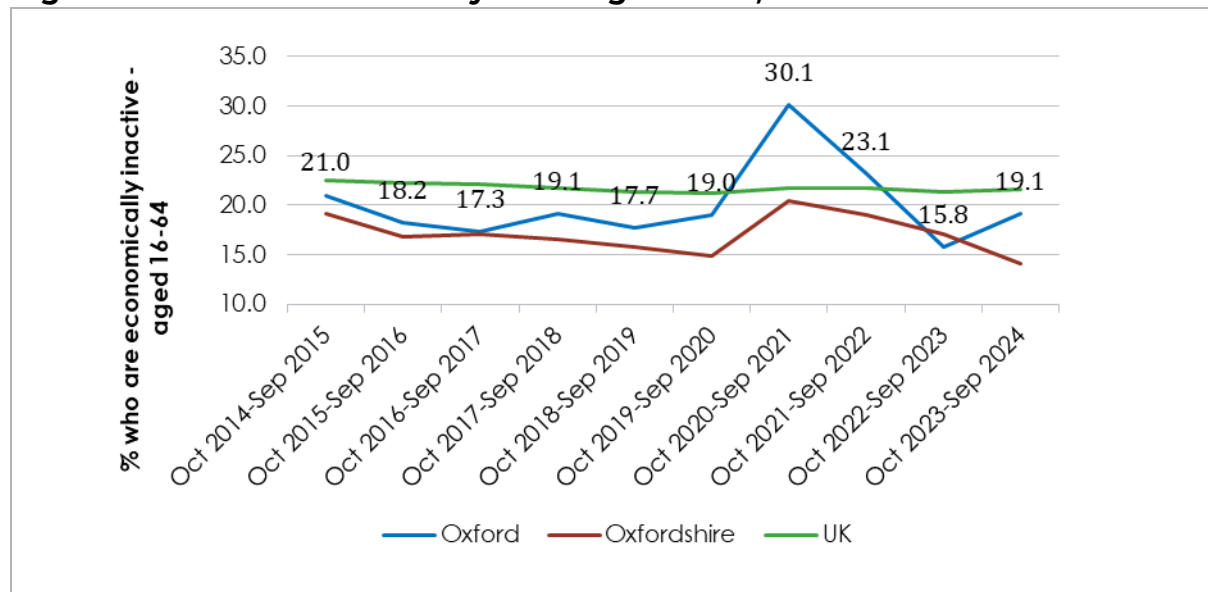
NB: Only occupations where numbers were available for Oxford were included in the analysis.

## Labour market

- 2.12** According to the Annual Population Survey in September 2024, Oxford had an unemployment rate of 6.3% which was higher than in Oxfordshire (2.3%) and the UK (3.7%). Economic inactivity more generally has also become an issue in recent

years, with the rate of people aged 16-64 not engaging in the labour market having increased from 17.7% in September 2019 to 19.1% in September 2024. However, inactivity has significantly recovered since its peak during the pandemic, when economic inactivity rates peaked at 30.1%. While the most recent estimate of economic inactivity in Oxford is higher than in Oxfordshire (14.1%), this is broadly aligned with the rest of the UK (21.6%). The long-term trend in economic inactivity is shown in Figure 2-5.

**Figure 2-5: Economic inactivity rate – aged 16-64, 2014-2024**

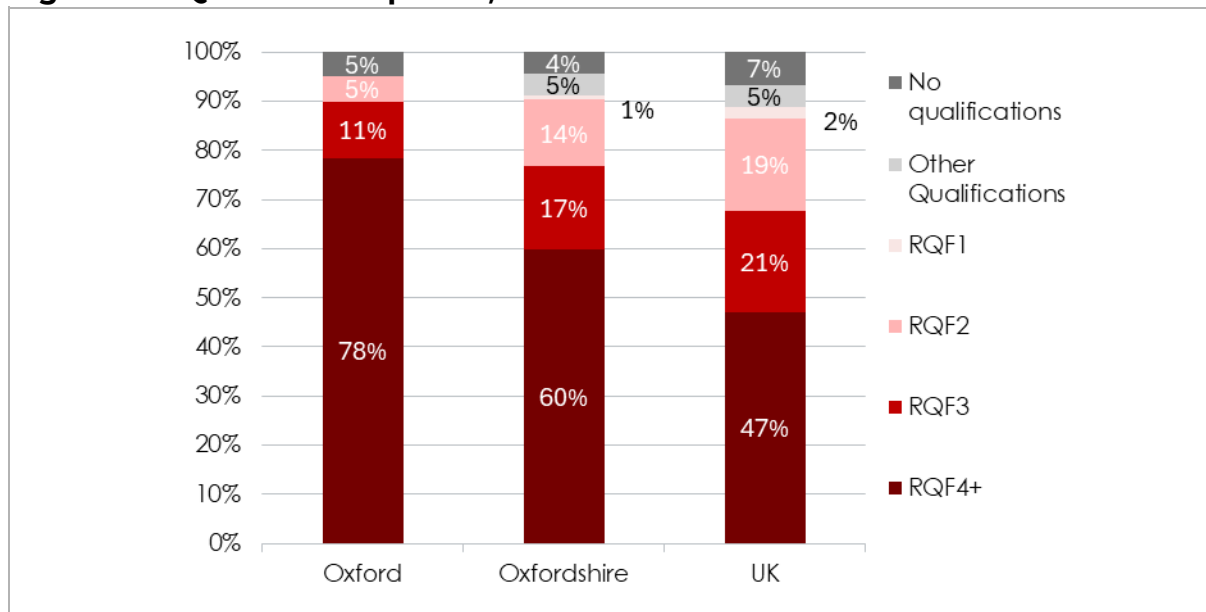


Source: SQW analysis of ONS Annual Population Survey

- 2.13** Of those who are economically inactive in Oxford, 82% are estimated to not want a job, based on estimates from the most recent ONS Labour Force Survey. Apart from full time education, long term sickness was the most commonly cited reason for inactivity, with 21.2% of those economically inactive reporting this. This figure is higher than in Oxfordshire (18.6%) but is lower than in the UK (28.5%).

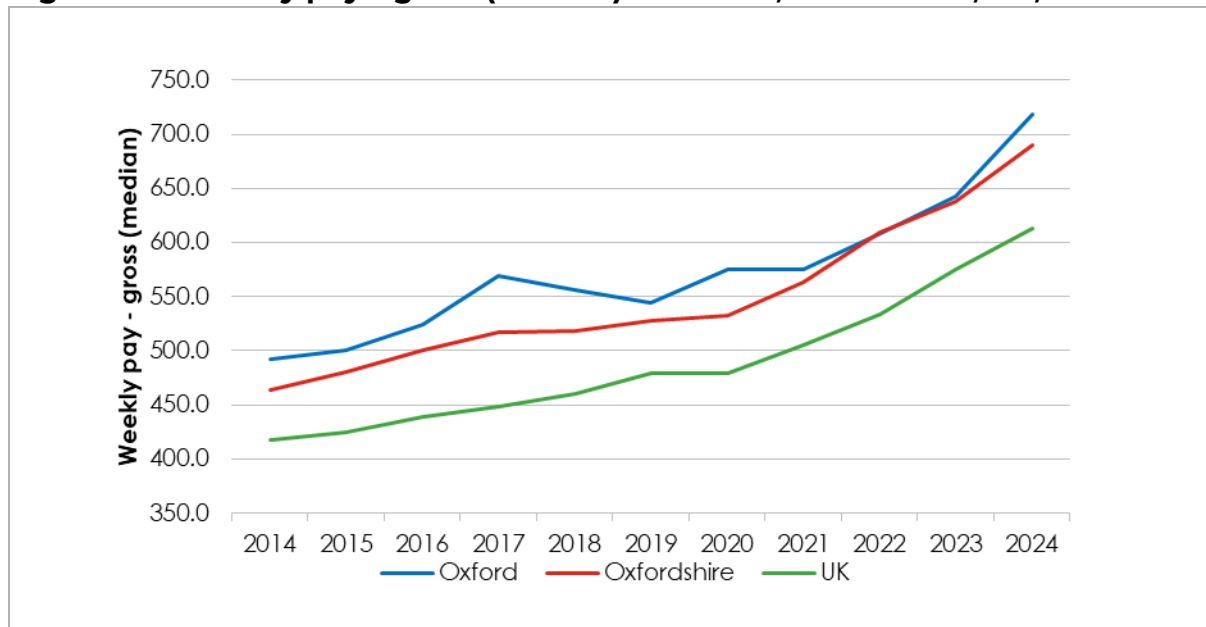
## Skills and income

- 2.14** Historically, the labour market in Oxford has been characterised by a strong skills base compared to the rest of the UK. Over 74.3% of the city's population have a degree-level qualification or higher. This is higher than Oxfordshire (59.9%) and over 27 percentage points higher than the proportion in the UK (47.1%). The proportion of the population with no qualifications is also lower, with 4.8% of people in Oxford estimated to have no qualifications compared to 6.6% nationally.

**Figure 2-6: Qualification profile, Jan - Dec 2023**

Source: SQW analysis of ONS Annual Population Survey

**2.15** Income has also remained relatively higher in the city for the last decade. Since 2014, gross weekly pay in Oxford has been comparatively higher than Oxfordshire and the UK. In 2024, gross weekly pay of full-time workers was £786, 8% higher than median gross weekly pay in the UK.

**Figure 2-7: Weekly pay – gross (median) in Oxford, Oxfordshire, UK, 2014-2024**

Source: SQW analysis of Annual Survey of Hours and Earnings

## Summary

**2.16** Oxford City has continued to grow rapidly over the last five years, having generated £8.4bn in GVA in 2024. From 2019 to 2024, GVA grew by 22%, nine percentage



points higher than the UK. In 2023, 125,800 employees were estimated to be working in businesses based in Oxford, making up nearly a third (32%) of the 392,500 jobs in Oxfordshire. While economic inactivity has recovered since its peak in 2020, there is still a significant proportion of people not participating in the labour market due to long-term sickness.

**2.17** ODS provides several key services to a range of organisations in the city and the wider region, enabling them to operate efficiently and to a higher capacity. As one of the 45 large employers in the city, ODS also provides employment opportunities across a wide range of occupations, including professional roles, elementary trades and transport operatives.

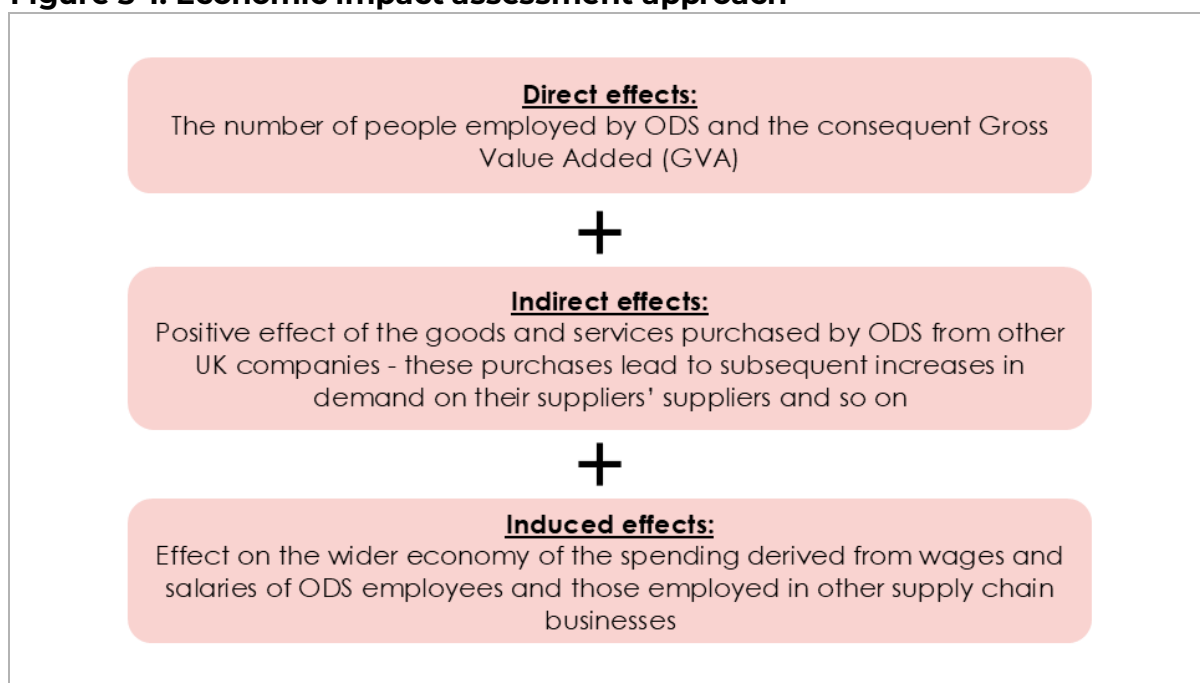
**2.18** The steps taken by ODS to become a more inclusive employer contributes to the ambitions of Oxford City Council to build a more inclusive economy. As will be discussed in Chapter 4, ODS takes significant actions to support a more inclusive hiring and working environment. Through its apprenticeship programme, ODS provides learning and employment opportunities for those with low or no qualifications.

## 3. Quantifying the economic impacts of ODS

### Introduction

- 3.1** This section describes the economic impact of the ODS Group focusing on the employment and Gross Value Added (GVA) supported by the company. We have developed an economic impact model drawing on data supplied by ODS, as well as other relevant secondary data from the Office for National Statistics (ONS).
- 3.2** The economic impact of ODS needs to be understood in terms of its direct effects and then how the company's activity creates demand elsewhere in the UK economy through indirect and induced effects (Figure 3-1).

**Figure 3-1: Economic impact assessment approach**



Source: SQW

- 3.3** The model sets out the impacts for three geographies: Oxford, Oxfordshire, and the UK.

### ODS Workforce

#### Location

- 3.4** Based on workforce data provided by ODS, the company currently employs 560 people. There are 301 employees who live in Oxford (54%) and 198 (35%) live in Oxfordshire. The remaining 60 employees (11%) live in the rest of the UK. (Table 3-1).

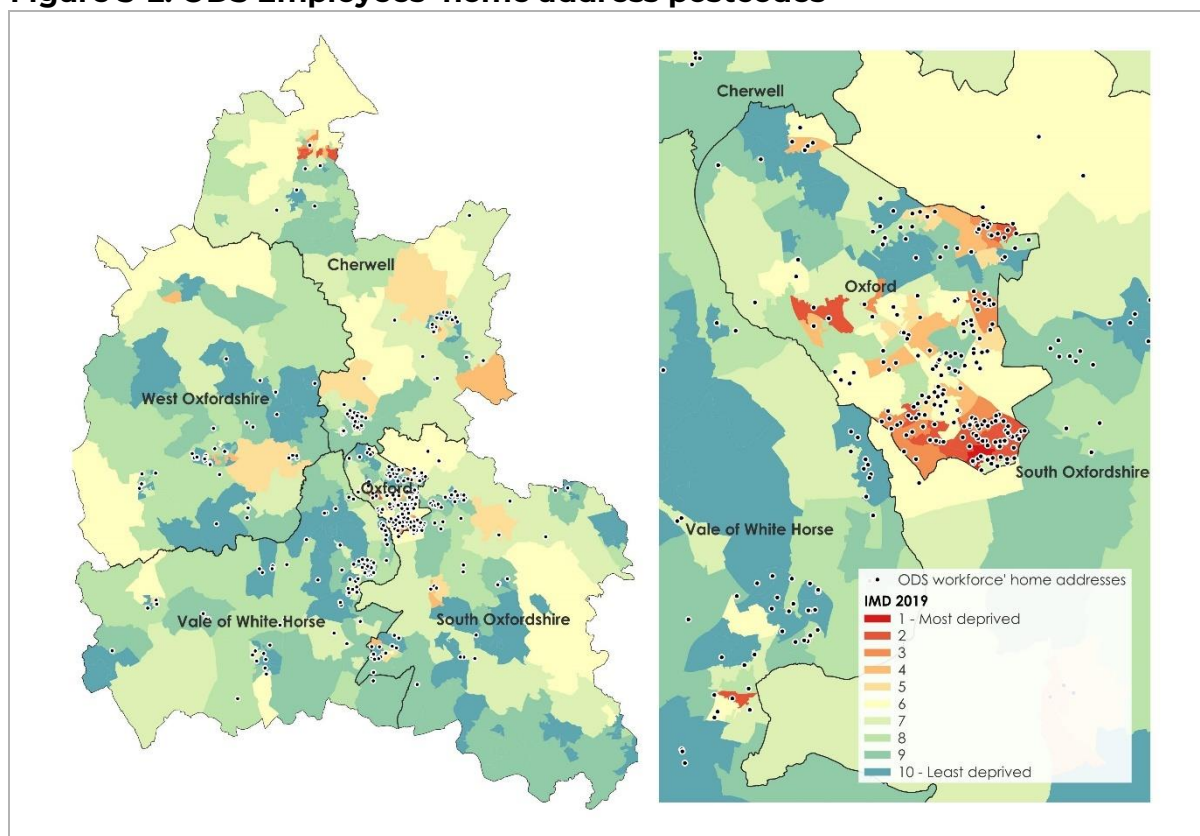
**Table 3-1: Location of the ODS workforce**

Location	Number of employees	%
Oxford	302	54%
Oxfordshire	198	35%
UK	60	11%
<b>Total</b>	<b>560*</b>	<b>100%</b>

\*Postcode data was not available for one employee. It was assumed that this employee resides in Oxford. |

Source: SQW analysis of ODS data

**3.5** The maps below (Figure 3-2) show the postcode location of the company's workforce. We have also included the latest Index of Multiple Deprivation map (2019) to highlight the importance of ODS as an employer for people living in the most deprived areas of the region.

**Figure 3-2: ODS Employees' home address postcodes**

Source: SQW (Made using QGIS)

### Profile of the workforce

**3.6** The vast majority (90%) of ODS staff are full-time employees (Table 3-2) and most are male (85%). Just under half of ODS employees (44%) are aged 30-49, followed by 43% who are aged 50-64, and just under a tenth (9%) who are under 30. A small number of employees (3%) are over the age of 65 (Table 3-3).

**Table 3-2: Employment status**

Employment status	Number of employees	%
Full time ( $\geq 30$ hrs per week)	506	90%
Part time ( $< 30$ hours per week)	20	4%
Not stated	34	6%
<b>Total</b>	<b>560</b>	<b>100%</b>

Source: SQW analysis of ODS data (no data for ODSTL staff)

**Table 3-3: Age profile**

Age grouping	Number of employees	%
Under 30	49	9%
30-49	249	44%
50-64	242	43%
65+	20	4%
<b>Total</b>	<b>560</b>	<b>100%</b>

Source: SQW analysis of ODS data

**3.7** Nearly four in 10 (39%) ODS employees are operatives. In addition, 26% are in skilled trades, 17% are management and office staff, and 7% are professional and technical staff. A smaller number of employees (5%) work in supervisory roles (Table 3-4).

**Table 3-4: Occupational breakdown**

	Number of employees	%
Management	43	8%
Office	48	9%
Operatives	221	39%
Professional and Technical	41	7%
Skilled trades	144	26%
Supervisors	29	5%
Not stated	34	6%
<b>Total</b>	<b>560</b>	<b>100%</b>

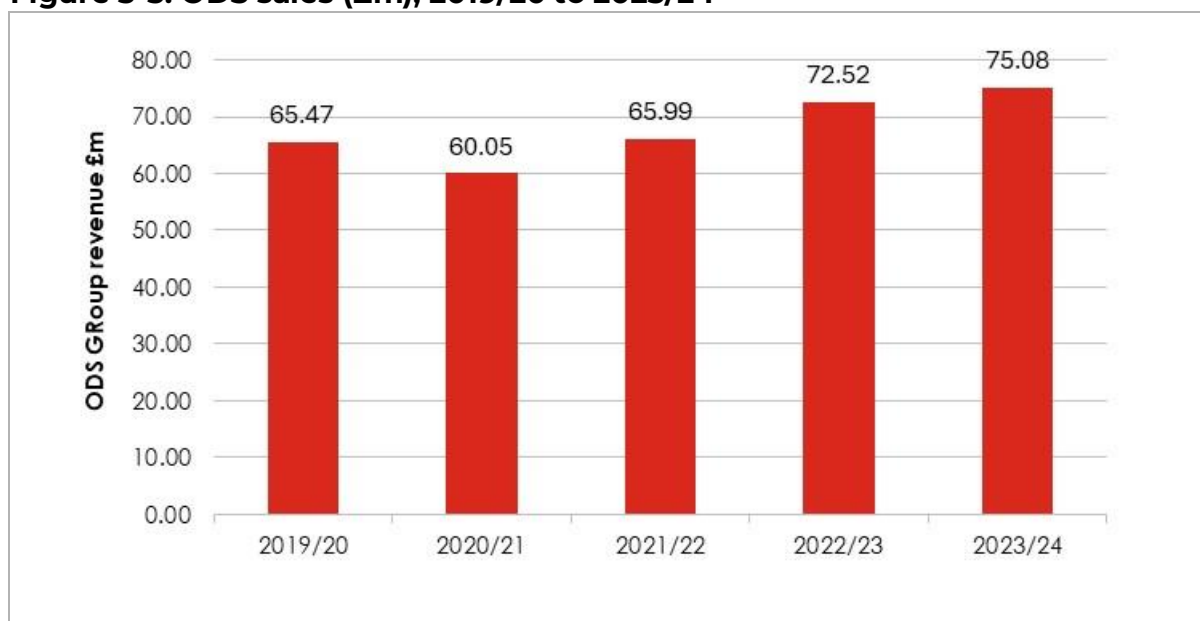
Source: SQW analysis of ODS data (no data for ODSTL staff)

## Direct effects

### Total sales

- 3.8** The total value of ODS sales has increased from £65.5m in 2019/20 to £75.1m in 2023/24.

**Figure 3-3: ODS sales (£m), 2019/20 to 2023/24**



Source: SQW analysis of ODS data

- 3.9** Based on the 2023/24 data, the vast majority of ODS sales are made to Oxford City Council and within Oxford itself. These account for £68.8m, which is 92% of all sales. In addition, there are sales worth £1.3m (2%) in the rest of Oxfordshire and £5.0m (7%) in the rest of the UK.

**Table 3-5: ODS sales by location (£), 2023/24**

Geography	Total value of sales	%
Oxford	68,799,269	92%
Rest of Oxfordshire	1,298,976	2%
Rest of UK	4,980,870	7%
<b>Total</b>	<b>75,079,115</b>	<b>100%</b>

Source: SQW impact model

### Direct GVA and employment

- 3.10** The direct employment is simply the number of jobs directly supported in ODS, which was 560 in 2023/24. GVA is calculated as the difference between the value of sales (£75.1m) and the purchase of “bought in” goods and services associated with

delivering those sales and other business costs, such as business rates and the apprenticeship levy. This gives a direct GVA impact in Oxford of £35.1m (Table 3-7).

**Table 3-6: Direct GVA calculations (£), 2023/24**

	2023/24
Total sales	75,079,115
Bought-in goods and services	35,341,820
Other costs (Business Rates, apprenticeship levy, etc.)	4,600,000
GVA	35,137,295

Source: SQW impact model

## Indirect effects

**3.11** In addition to its direct GVA effects, ODS also generates economic activity through its purchases of goods and services in the UK economy. Based on supplier expenditure for 2023/24 provided by ODS, the company purchases around £35.3m from UK suppliers.

**3.12** Table 3-7 shows the different cost categories, with highest levels of expenditure on construction (£15.0m), professional services (£8.0m) and council services (£5.6m).

**Table 3-7: Breakdown of ODS' UK based purchases by cost category (£), 2023/24**

	Oxford	Oxfordshire	UK total
Arts, entertainment and recreation	-	27,047	64,630
Construction	3,909,015	10,683,193	14,974,458
Council services	5,598,375	5,602,344	5,611,798
Equipment and materials	3,376	212,570	1,893,029
Facilities management services	96,340	615,265	1,519,440
Food and drink	4,689	51,848	82,046
Health and social care	6,025	28,026	91,934
ICT	38,587	48,566	644,388
Office costs	3,529	3,529	36,457
Professional services	59,489	2,251,946	7,962,556

	Oxford	Oxfordshire	UK total
Training	7,307	26,915	36,876
Transport	1,627	4,687	14,325
Utilities	-	28,718	75,931
Vehicle maintenance	112,098	467,813	2,195,298
Other	13,432	67,410	138,653
<b>Total purchases/ cost of sales £</b>	<b>9,853,890</b>	<b>20,119,876</b>	<b>35,341,820</b>

Source: SQW impact model

**3.13** The majority of ODS purchases are made within Oxfordshire, with 28% made in Oxford, and 29% in the rest of Oxfordshire. The remaining 43% is spent with suppliers based in other parts of the UK (Table 3-8).

**Table 3-8: Total value of ODS' UK based purchases by geography (£), 2023/24**

	Value of purchases	%
Oxford	9,853,890	28%
Rest of Oxfordshire	10,265,986	29%
Rest of UK	15,221,943	43%
<b>Total</b>	<b>35,341,820</b>	<b>100%</b>

Source: SQW impact model

**3.14** The locations of the top 100 ODS suppliers (based on spend) is shown in Figure 3-4.



**Figure 3-4: Map of ODS suppliers, 2023/24**

Source: SQW (Made using QGIS)

**3.15** In order to calculate indirect GVA and employment impacts from these purchases in the local, regional, and UK economy, we have used data from the Annual Business Survey<sup>4</sup> to calculate turnover to GVA ratios and then used sector employment data from BRES<sup>5</sup> average GVA per job for relevant sectors. We have then factored in multipliers for subsequent supply chain effects. The indirect GVA and employment effects are set out in Table 3-9. The total indirect GVA generated in the UK is estimated to be £20.3m, which supports 311 jobs.

**Table 3-9: Indirect GVA (£) and employment, 2023/24**

	Oxford	Oxfordshire	UK total
Indirect GVA (£)	5,197,580	10,475,431	20,317,539
Indirect employment	70	150	311

Source: SQW impact model

## Induced effects

**3.16** In addition to the purchase of good and services from other companies, ODS generates further induced effects through the wages and salaries paid to

<sup>4</sup> ONS (2022) *Annual Business Survey*

<sup>5</sup> ONS (2022) *Business Register and Employment Survey*

employees, a proportion of which will then be spent in the local economy and regional economies. Based on the workforce data provided by ODS for 2024, total employment costs for the company were £31.1m and total basic salaries were £20.9m. Using the UK Government's income tax calculator,<sup>6</sup> we have adjusted the basic salaries to calculate net salaries which we estimate to be £16.6m.

**3.17** Using the net salary data, we then calculated in which sector and where that income is re-spent. The ONS Family Spending Survey<sup>7</sup> provides data on the average patterns of household expenditure, and we have used this to estimate where ODS employees spend their salaries. Table 3-10 provides a breakdown by sector and geography.

**Table 3-10: Breakdown of employee expenditure by geography (£), 2023/24**

	Oxford	Rest of Oxfordshire	Rest of UK	Total
Alcoholic drinks, tobacco and narcotics	191,367	145,491	60,845	382,013
Clothing and footwear	272,469	206,624	60,126	545,853
Communication	326,028	242,867	80,244	646,066
Education	118,913	82,928	17,186	228,941
Food and non-alcoholic drinks	998,765	755,915	251,700	1,995,381
Health	109,656	84,675	37,729	220,405
Household goods and services	533,720	403,345	145,030	1,064,307
Housing(net), fuel and power	1,500,396	1,049,022	287,273	2,883,887
Miscellaneous goods and services	607,021	456,767	151,442	1,209,173
Other expenditure items	1,130,227	860,287	246,498	2,268,905
Recreation and culture	872,138	662,073	236,220	1,743,588
Restaurants and hotels	504,170	375,929	122,177	999,810
Transport	1,196,303	899,908	288,880	2,384,024

<sup>6</sup> [www.gov.uk/estimate-income-tax](https://www.gov.uk/estimate-income-tax)

<sup>7</sup> ONS (2023) Family Spending Survey

	Oxford	Rest of Oxfordshire	Rest of UK	Total
<b>Total</b>	<b>8,361,172</b>	<b>6,225,831</b>	<b>1,985,350</b>	<b>16,572,353</b>

Source: SQW impact model

**3.18** We have then used relevant turnover-to-GVA and GVA per job ratios from the ONS Annual Business Survey and BRES to calculate induced GVA and employment effects. Once again, we have included in multipliers for subsequent supply chain effects. The induced GVA and employment effects are set out in Table 3-11. The total induced GVA generated in the UK is estimated to be £10.2m which supports 283 jobs.

**Table 3-11: Induced GVA (£) and employment, 2023/24**

	Oxford	Oxfordshire	UK total
Induced GVA (£)	3,223,349	5,426,326	10,188,424
Induced employment	99	166	283

Source: SQW impact model

## Total economic impact

**3.19** Drawing the previous strands of analysis together, the total GVA and employment impacts are set out in the tables below. The total economic impact of ODS for the different geographies are as follows:

- **Oxford - £43.6m in GVA and 728 jobs**
- **Oxfordshire - £51.0m in GVA and 876 jobs**
- **UK - £65.6m in GVA and 1,154 jobs**

**Table 3-12: Total GVA impacts (£), 2023/24**

	Oxford	Oxfordshire	UK total
Total direct GVA	35,137,295	35,137,295	35,137,295
Total indirect GVA	5,197,580	10,475,431	20,317,539
Total induced GVA	3,223,349	5,426,326	10,188,424
<b>Total GVA effects</b>	<b>43,558,224</b>	<b>51,039,053</b>	<b>65,643,259</b>

Source: SQW impact model

**Table 3-13: Total employment impacts, 2023/24**

	Oxford	Oxfordshire	UK total
Total direct employment	560	560	560
Total indirect employment	70	150	311
Total induced employment	99	166	283
<b>Total employment effects</b>	<b>728</b>	<b>876</b>	<b>1,154</b>

Source: SQW impact model

## 4. Wider socioeconomic impacts of ODS

**4.1** ODS' approach to social value and sustainability practices is centred around four key pillars – workforce, community, environment, and supply chain. This section provides an overview of ODS activities and impacts around workforce support and development, community partnership and engagement, and environmental sustainability.

### Workforce support and development

**4.2** ODS has made significant commitments to support inclusivity within its workforce. According to the ODS ED&I report 2024, 15 out of 27 (55%) of senior managers are women, 17 percentage points higher than the 2022 Chartered Management Institute Survey of businesses across the UK. To further support gender inclusivity, ODS have taken steps such as signing the Menopause Pledge and rolling out Menopause Awareness training for Managers.

**4.3** ODS is also accredited by Inclusive Employers, a membership organisation supporting employers to audit, train, and embed workplace inclusion, and is a signatory of the Armed Forces Covenant. ODS has also earned Disability Confident Leader status, which is held by only seven other organisations in Oxfordshire.

**4.4** According to the ODS ED&I report 2024, the mean gender pay gap was -15.5% in 2024 compared to -10.96% in 2022. This means that women on average earn more than men in the company. The number of females in roles in the top salary quartile in 2024 was 17.8%, compared to 15.7% in 2022. The same report highlights that there was no disability pay gap (based on partial data), but acknowledges that there is some work to do in terms of addressing the ethnicity pay gap.

**4.5** ODS runs a number of initiatives to support workforce development and wellbeing. ODS has committed to paying the Oxford Living Wage, in recognition of the high costs of living in the city. Other initiatives to support employee wellbeing include:

- Providing access to the Employee Assistance programme and Blink platform, a platform which enables employees to easily access support available to them through ODS. In recognition of their innovative approach to workforce communication and engagement through the Blink platform, ODS was awarded the Association for Public Service (APSE) Service Award 2024 in the category of Best Workforce Initiative.
- Providing access and training to 44 Mental Health First Aiders in the company.

**4.6** Continuous development of the company's workforce is similarly a key priority. In 2023, 1,732 training days were provided across the company's workforce.

**4.7** ODS has also invested in its future workforce by running an Apprenticeship Programme for several years. As of March 2025, ODS was supporting 15 Oxford-based apprentices in a range of roles in the company. These include apprentice electricians, plumbers, gas engineers, and installation and maintenance electricians. Of these, 73% were aged 21 and below.

## Community partnership and engagement

**4.8** Reaffirming the company's commitment to building a more inclusive local economy, ODS signed the Oxfordshire Inclusive Economy Partnership Charter in January 2023, which helps organisations to embed social value into its operations and work to improve lives of Oxfordshire residents.

**4.9** Since 2023, ODS has also taken significant actions to support people with convictions in gaining employment, including by engaging with the local prison HMP Bullingdon. ODS currently employs one prisoner from the Spring Hill open prison. To further support ex-offenders in finding employment, ODS also recently joined Clean Sheet, which supports ex-offenders in overcoming stereotypes and gaining employment based on their merit and skill.

**4.10** ODS has engaged with a number of national and local charities, making a significant positive impact on the community. In 2025, the staff-nominated charity of the year Cancer Research UK received £8,000 worth of support from ODS through a number of fundraising activities, such as joining Race for Life, the Chiltern 50 challenge, and holding a cake sale. These donations were specifically earmarked for the local cancer research centre at the Churchill Hospital in Oxford. Other charitable initiatives included:

- Donating 30 tonnes of nutritious and environmentally friendly garden compost to Oxford's allotments. These were produced from household and commercial green waste from across the city. ODS also organised a compost giveaway for residents.
- Supplying an expert crew to build a 20-foot polytunnel for Oxford's Larkrise Primary School. This tunnel is being used to help the school be more sustainable and grow food onsite.
- Donating bicycles to Asylum Welcome, who will repair and use these bicycles as sustainable transportation for refugees in Oxford.

- Providing resources and volunteering time to Barracks Lane Community Garden and the Oxford Hub, in conjunction with supply chain partner Huws Gray.
- Providing maintenance services as the official maintenance partner for OxTrail, a sculpture trail across Oxford working with Sobell House Hospice Charity.
- Annual food collections for Oxford Food Hub.

**4.11** Highlighting the social impact achieved through this work, ODS has received recognition from several organisations. In 2023, the company was shortlisted for two awards in the Circular Economy Achievement category of the Local Authority Recycling Advisory Committee (LARAC) Awards. In 2024, ODS was also shortlisted in the Social Value category of the National Recycling Awards 2024 for the company's Composting for a Greener Community initiative.

**4.12** ODS also provides employees the opportunity to volunteer with their chosen organisations through the ODS Volunteering Bank. In each year, ODS allocates about 200 hours of volunteering time that every employee can apply to use. As of March 2025, 121 hours (c. £2k) have been used with a range of local and national charities. These include: Children in Need, SHOUT, Greyfriars Catholic School, and Cherwell School.

## Environmental sustainability

**4.13** Underlining the company's commitment to environmental sustainability, ODS is committed to the ISO 14001, which is the internationally recognised standard for environmental management systems. ODS also holds PAS2030 Decarbonisation Retrofit Installer status. ODS has also continued to track its Scope 1 and Scope 3 carbon emissions. Since the company's first annual report in 2014/15, ODS has reduced its carbon emissions by 63%.

**4.14** ODS activities are centred around providing public services to keep the city a thriving place to live, work, and visit. This includes cleaning the streets, emptying the bins, repairing and maintaining dwellings, and providing essential social housing. In 2022/23, 7,500 dwellings were repaired and maintained. This figure rose to 8,300 homes and 3,300 corporate buildings in 2023-24. In 2022/23, ODS also erected a flood defence system to protect residents and their homes during severe weather.

**4.15** The transition to cleaner energy has been a key priority within ODS, particularly in upgrading its fleet. As of 2023/24, 32% of the ODS fleet is electric. 29% (105) of its 357 vehicles are electric, zero emissions vehicles, exceeding the company's target of 25% by 2023. To reduce sole occupancy journeys, ODS also acquired six



electronically assisted bikes to its fleet, which are available from all depots. Two further electric bikes fitted with storage containers are expected to be acquired.

**4.16** ODS also supports biodiversity through the maintenance of 900 acres of parks and countryside – home to insects and animals, animal protection and welfare activities (delivering hay, preventing spread of Avian flu). In 2023/24, 70 new trees were planted in these grounds.

**4.17** ODS also engages in several waste management initiatives, including recycling and waste education programmes. In 2022/23, the Podback Recycling Scheme collected 1.9 million coffee pods. In November 2023, a new Vape Recycling scheme was launched with Oxfordshire County Council and Cherwell District Council, and funded by Material Focus. Over 12 months, this scheme collected more than 80,000 vapes for recycling. The Recycling and Waste Team within ODS deliver Recycling and Waste Education Programmes for businesses, universities, and other local organisations. Looking ahead, the Carbon Management Plan of ODS includes several key actions to further reduce the company's emissions and achieve net zero. These actions include installation of more solar technology across the estate, decarbonising buildings by increasing energy efficiency and moving to electric heating systems, and raising awareness within the company's staff about the benefits and opportunities to reduce carbon emissions.

# SQW

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