

Clarity

Inward Investment Marketing

Invest
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East West Rail Marketing

Joint Commission: Phase 1

Business Identification

A Report for Milton Keynes City Council
September 11th 2025



This report identifies Milton Keynes' distinctive location advantages for Tech businesses, as a basis for identifying and targeting Oxford-based companies with potentially aligned expansion location needs.

The report:

- Identifies the characteristic location requirements of UK Tech businesses - encompassing Digital Tech and Engineering Tech (or 'Advanced Manufacturing'), considering multiple key location factors. (*See grey boxes*).
- Identifies Milton Keynes' location value proposition benefits for Tech companies, in response to those characteristic identified requirements, and considering the same key location factors. (*See pink boxes*).
- Identifies challenges facing Milton Keynes, by location factor, representing potential barriers to business relocations from Oxford (*see white boxes*) and possible remedial actions (*see green boxes*).
- Utilises this research to assign an indicative score (1 to 5) to Milton Keynes and Oxford for each of these location factors. Where appropriate, scores are assigned for businesses at different stages of growth ('start-up', 'growth' and 'expansion'), based on the characteristic needs of businesses at those stages. These scores are used to identify Milton Keynes' distinctive areas of strength as a Tech business location, versus Oxford, and to identify Oxford-based businesses with potentially aligned profiles and expansion location needs.

Summary of Findings

- Across all key location factors, evidence suggests that Milton Keynes' inward investment value proposition is strongest to Oxford-based Tech businesses broadly in the 'growth' and 'expansion' stages - i.e. businesses moving on from the close university R&D and incubation / support links characteristic of Tech 'start-up' companies.
- In the case of Tech workers, evidence suggests that Milton Keynes' quality of life / lifestyle value proposition is strongest for workers in mid- rather than early-stage careers, characterised by priorities including housing affordability, family amenities, and diverse career growth opportunities.
- For both Tech businesses and workers, these findings reinforce Milton Keynes positioning as a key 'growth pole' within the Oxford-Cambridge Corridor, with significant location advantages versus Oxford for expanding businesses and workers developing, rather than starting, their careers.

Key Location Factor Analysis

The analysis considers key factors influencing Tech business location choice:



Property



Workforce & Skills



Ecosystem & Clustering



R&D & Technology



Connectivity

Additional Outputs

- While *strategies to engage target businesses* are formally an output of project Phase 1 (this report), they are more appropriately presented within the Marketing Strategy (Phase 2), and will therefore be included in that report.
- Narratives presenting Bletchley's distinctive proposition as a Tech business location will be developed further in project Phase 2. Summaries can be added to this report document if required.

Strategic & Sector Alignments

- The Milton Keynes Tech sector strengths identified in this report align closely with both the city's established **Primary Clusters** and **Emergent Sectors**, and sectors identified as **highest potential** (included in the IS-8) in the government's [UK Modern Industrial Strategy](#) (June 2025).
- The identified Milton Keynes' Tech-sector growth opportunity also aligns with the city's location proposition within the Oxford-Cambridge Corridor: *'The City where ideas become reality'*, and *'Space to start up, scale up and grow'*.

MK Primary Clusters & Emergent Sectors (Tech-focused)	Aligned UK Industrial Strategy Highest Potential Sectors (in IS-8)
Digital & Technologies (D&T) (Primary Cluster) Includes advanced connectivity technology, AI, cyber security, Fintech	<ul style="list-style-type: none">Digital & Technologies (D&T)
Advanced Manufacturing (AM) (Primary Cluster) Includes aerospace, automotive, batteries, space	<ul style="list-style-type: none">Advanced Manufacturing (AM)
Financial Services (FS) (Primary Cluster) Includes Fintech	<ul style="list-style-type: none">Financial Services (FS)
Defence (D) (Emergent Sector) Includes drones and autonomous system	<ul style="list-style-type: none">Defence (D)
Creative Cluster (CC) (Emergent Sector)	<ul style="list-style-type: none">Creative Industries (CC)

Business Identification Exercise

- The exercise then identifies a Short List of 18 target businesses in the Oxford Cluster / Tech Ecosystem (supplied in a separate spreadsheet) that have close profile alignments with Milton Keynes' identified location advantages, supported by specific intelligence relating to business expansion.
- This research exercise utilised a range of sources including existing Oxford Cluster listings (e.g. the Oxfordshire Innovation Engine report, 2023 and Oxford Calling), and occupant listing for the Oxford Cluster's major science and technology parks - totalling several hundred businesses. Geographically, the search covered Oxford and surrounding, key Oxford Cluster locations, including Abingdon, Didcot, Bicester, Witney, Harwell and Culham.
- From these sources, long lists were refined to identify businesses with profiles closely aligned with Milton Keynes' Digital Tech and Engineering Tech specialisations (see slide 15), and the city's Primary Clusters and Emergent Sectors (see slide 3), which also align with 'highest-potential' (IS-8) sectors in the UK's Industrial Strategy, 2025 (see slide 3).
- The list was then further refined to identify businesses with evidence of investment, growth, and further growth potential - including spinout, acquisition, scale-up, commercialisation, or funding rounds (e.g. Series A or B) - in line with Milton Keynes' distinctive advantages for expanding Tech businesses.

- Led by Clarity's Digital Strategies Director, AI tools we used expertly to filter large quantities of company data (for a project of this scale). Identified companies were then checked manually by Clarity's inward investment consultants, using verifiable sources including pitchbook.com and Companies House. The supplied Short List also links to sources (e.g. news releases) evidencing business growth.
- For the Business Identification Exercise, it was decided that a structured approach to refining lists, then identifying multiple alignments with Milton Keynes' Tech specialisations, was more effective than attempting to allocate scores to businesses that might not accurately reflect their investment potential (especially in the context of the final Short List comprising only 18 companies).
- From the same research, a Long List of 45 businesses in the Oxford Cluster / Tech Ecosystem is also provided (worksheet 2 of the same spreadsheet), based on more general profile alignments with Milton Keynes' identified location advantages.

This list is included to provide a larger, relevant target audience for online marketing activities targeting the Oxford Cluster / Tech ecosystem overall, based on the 'inbound' principle of targeting broad sector networks to *attract* businesses with specific interest in the MK offer. (Details of the recommended approach will be included in the Phase 2 Marketing Strategy).



Typical UK Tech company property needs by growth stage

Startup Stage (indicatively <10 employees)

- Minimal office space for small teams; cost-efficiency prioritised; hybrid working / adaptable co-working environments; shared facilities and meeting space; high-speed internet; shared short-term leases for flexibility; proximity to incubators, accelerators, and networks for mentorship and funding.

Growth Stage (indicatively 10-50 employees)

- Dedicated office space for growing teams; high-speed internet; strategic locations in tech hubs; flexible office layouts to enable collaboration and innovation as well as private, focused work. Access to a supportive ecosystem to facilitate growth.

Expansion Stage (indicatively 50+ employees)

- Dedicated space for larger teams; grade-A offices to reflect brand and culture; customised space with areas for (e.g.) collaborative product R&D and client meetings; longer-term leases to enable stability and growth; wellbeing provision (e.g. fitness areas & relaxation zones); advanced communications infrastructure.^{1,2,3}

Source: (1) Deloitte Insights - UK tech growth; (2) BDO - UK tech hotspots; (3) Indeed - startup growth stages



Property solutions for tech companies in Central MK

- Accommodation is available for digital tech businesses at all stages of growth:
 - Unity Place - x+why:** 60,000 sq ft of contemporary office space; co-working and breakout space, private offices and enterprise suites; bookable meeting rooms, mission rooms, phone booths, and amenities.⁴
 - Co space MK:** serviced office / co-working space; meeting rooms & breakout areas; super-fast WiFi; wellbeing - cycle storage, lockers and showers; adjacent to Central Milton Keynes Station.⁵
 - Spaces:** business centre; flexible working spaces, private areas, meeting rooms; lounges, super-fast Wi-Fi; close to MK station.⁵
 - Silbury House:** grade-A office suites; fibre internet; energy efficient & sustainable; high-spec communal areas; breakout spaces; garden courtyard; wellbeing provision - lounge, cycle storage, showers.⁵
- Older, grade-B offices are available on Central MK boulevards (e.g. Midsummer Boulevard), with some undergoing refurbishment.⁴
- The Pinnacle:** (grade-A, 664,400 sq ft) will boost supply from Q4 2025⁶
- MK offers prime office rental cost savings versus Oxford of -53%.**⁶
- Prime industrial units are also available for tech businesses (e.g. **Indurent Park**) with circa -22% cost savings vs. Oxford.⁷

Source: (4) Invest MK; (5) Estates Gazette; (6) LSH South East Office Market Report 2025; (7) Agents - Carter Jonas, Colliers



Prime Office Property Cost Savings¹

-53%

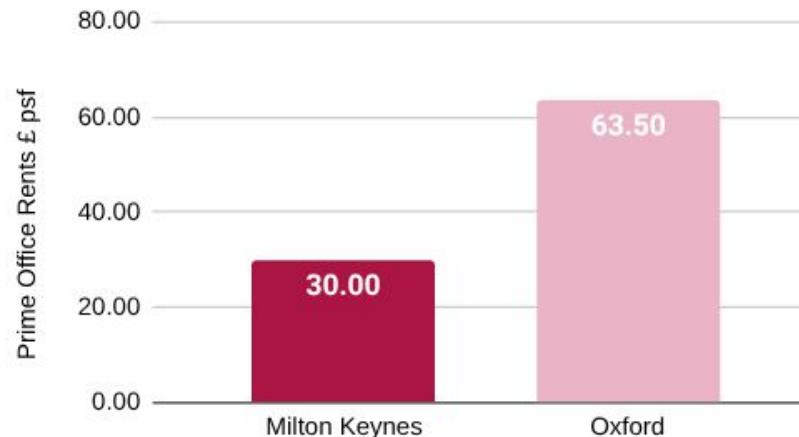
Prime Office Rental Costs
Milton Keynes vs. Oxford

Prime Industrial Cost Savings²

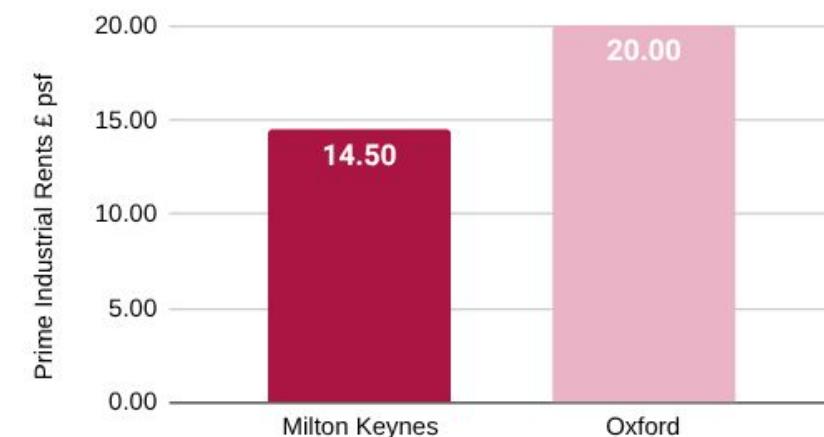
-22%

Prime Industrial Rental Costs
Milton Keynes vs. Oxford

Prime Office Rents, £ per sq ft, H1 2025¹



Prime Industrial Rents, £ per sq ft, H1 2025²





Property Challenges in Milton Keynes

- ! The 2022 MK Tech Ecosystem Report, highlighted that Central Milton Keynes then lacked Tech sector-focused accelerators, incubators and a technology hub.¹
- ! Central Milton Keynes continues to lack Tech sector-focused accelerators (e.g. the Natwest Accelerator is cross-sector).¹
- ! Central Milton Keynes continues to lack Tech sector-focused Incubators with accommodation for start-up and growth businesses. (Eagle Labs is in Cranfield, outside MK).¹
- ! In MK, only **12%** of current office supply is grade-A (vs. **54%** in Oxford), with only 2 grade-A options above 10,000 sq.ft. available as of H1 2025. I.e. prime office supply is currently constrained.³
- ! Older, grade-B office supply in Central MK may not meet the requirements of Tech businesses in growth and expansion stages.²
- ! 'Oxford is by a distance the leading hotspot for speculative development in the South East', with a focus on 'lab-enabled' or hybrid workspace, notably on science parks.³ This highlights the strength of Oxford's property offer for start-up and growth-stage Tech businesses.



Property: Investment Barriers & Potential Remedies

- The absence of a technology hub and Tech business incubators within MK may represent a barrier to attracting early-stage Tech businesses. The development of both would therefore be beneficial (although focused as much on growing indigenous businesses as inward investment attraction).
- Engagement with the property sector to increase the supply of grade-A offices will enable the attraction of 'growth' and 'expansion' businesses.



Milton Keynes & Oxford: Property Scoreboard

Growth Stage	Comments	MK / 5	Oxford / 5
Startup	<ul style="list-style-type: none">MK offers available flexible and serviced workspace, but supply for early-stage Tech businesses is far greater in Oxford.	3 / 5	5 / 5
Growth	<ul style="list-style-type: none">MK supply is constrained compared to Oxford but office cost advantages for Digital Tech businesses are significant.	4 / 5	4 / 5
Expansion	<ul style="list-style-type: none">Cost savings vs. Oxford are substantial for expanding businesses. New MK office schemes will boost constrained supply.	4 / 5	3 / 5



Typical UK Tech company workforce & skills needs

Technical Skills

- Tech companies are likely to require technically skilled personnel across specialisations including software development, AI, data analytics, cybersecurity, Internet of Things and robotics, for tasks encompassing research and development of products and applications, ongoing maintenance, technical support, and quality assurance.^{1,2,3}
- The Milton Keynes and AI Report (2020) stated that '*over the past six months most AI jobs advertised have been for technical roles with experience in modelling languages (Python and R) and specific database languages (SQL)*'.⁴

Expansion Stage Roles & Skills

- Tech companies in the growth and expansion stages typically also require a wide range of senior, management and other roles and skills across areas including operations, HR, finance, administration, sales marketing, and customer support.^{1,3,6}

Skills Pipeline

- Tech companies benefit from proximity to universities and training institutions producing graduates in relevant fields including computer science, data analytics, and software engineering.

Qualifications

- Required qualifications are likely to include technical certifications, Bachelors or Masters degrees, or PhDs (notably for R&D roles) in subjects including or related to computer science, software engineering, data analytics, data science, cyber security, Internet of Things and robotics.^{1,3,5}



Milton Keynes workforce advantages for Tech companies

Milton Keynes outperforms Oxford in key technical and corporate skills classifications prioritised by expanding Tech businesses.

Digital Tech

- In the key classification SIC62 (computer programming, consultancy and related activities), **Milton Keynes (city) has 7,000 employees compared with 3,000 in Oxford (city) (2.3 X).**⁶ (Data applies to city / local authority areas).

Financial Services / Fintech

- Combining expertise in Finance and Digital Tech, Milton Keynes is a leading location for Fintech expertise (including Santander UK's digital hub).
- In the key Finance classification SIC64 (financial services), **Milton Keynes (city) has 7,000 employees compared with just 500 in Oxford (city) (14 X).**⁶

Corporate / Business Expansion

- As a major business centre, Milton Keynes offers the breadth of workforce capabilities required by expanding Tech businesses.
- In the key classification SIC70 (head office and management consultancy), **Milton Keynes (city) has 4,500 employees compared with 3,500 in Oxford (city) (1.3 X).**
- **Graduates:** MK has a higher % of people qualified to RFQ4+ (higher education) than the Great Britain average (50% vs. 47.6%).⁷

Source: (6) ONS BRES 2023 (latest data); (7) ONS APS, 2024 (latest data)



Milton Keynes skills provision advantages for Tech companies

- **Milton Keynes College (MKC)** vocational courses include: Certificate in Digital Technologies; HNCs and HNDs in Digital Technologies and Engineering.
- **South Central Institute of Technology - SCIoT** (led by MKC, based in Bletchley) delivers higher-level technical qualifications including: HNCs (cybersecurity & networking; AI and software development) and HNDs (digital technologies in software development / cyber and networks); and engineering HNCs / HNDs.
- **MK:U** (Cranfield University, supported by Santander) is the UK's first university focused on digital technology skills including computer science, data science, and software engineering. MK:U's engagement with Cranfield includes joint academic programmes, research collaboration and knowledge exchange.
- **Open University:** courses and qualifications include BSc (Hons): Computing and IT (software development, web technologies, data management); Engineering (mechanical, electrical, electronic); Combined STEM.
- **Cranfield University** (post-graduate only) ranks among the world's best universities (QS, 2025), for Engineering -Electrical and Electronic (world top-35), Business and Management (world top-150), Computer Science and Information Systems, Materials Science, Statistics and Operational Research.¹
- **Apprenticeships:** **MK:U** degree-level apprenticeships include cybersecurity, data science, digital and technology solutions, robotics. **SCIoT** apprenticeships include ICT, cybersecurity, data analysis, software development.

Source: (1) QS World University Rankings, 2025



Digital Tech Workforce Advantage (No's)¹

2.3 X

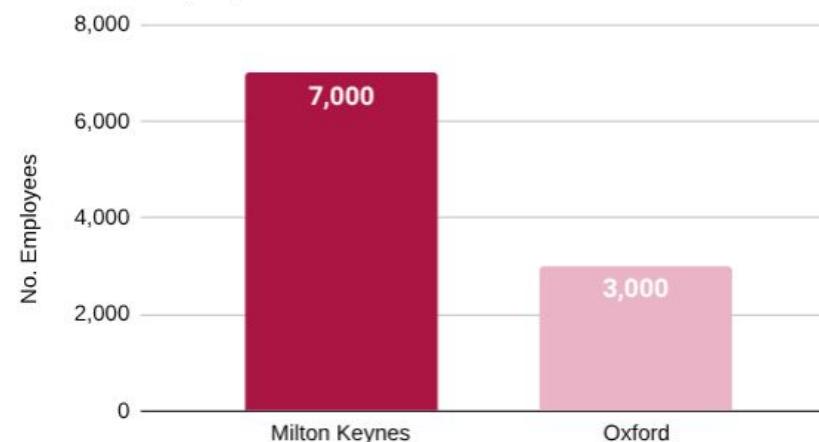
Digital Tech Workforce Size
Milton Keynes vs. Oxford¹

Digital Tech Workforce Advantage (%)¹

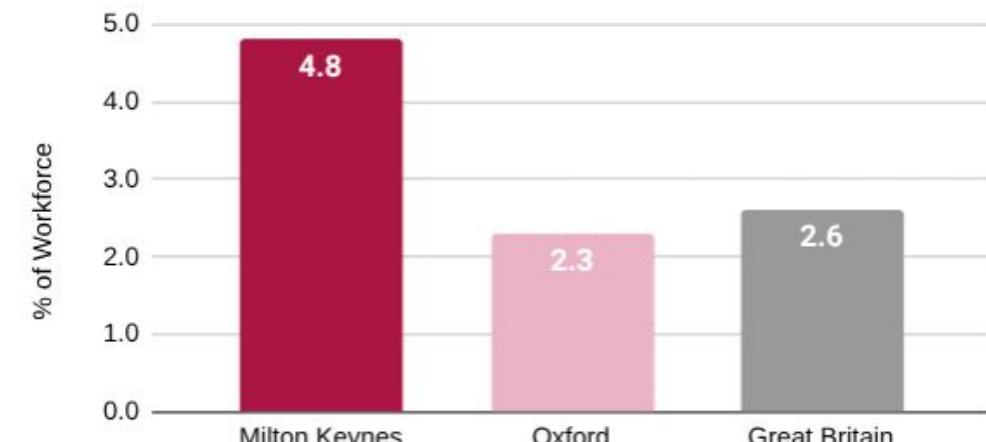
2 X

Digital Tech Workforce (%)
Milton Keynes vs. Oxford

No. of Digital Tech Employees (SIC 62)¹



Digital Tech Employees (SIC 62): % of Workforce¹





Financial Services Workforce Advantage (No's)¹

14 X

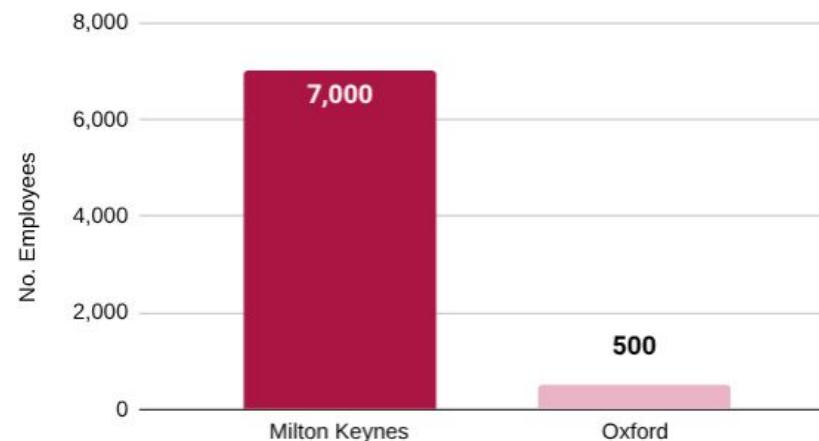
Financial Svs Workforce Size
Milton Keynes vs. Oxford¹

Financial Services Workforce Advantage (%)¹

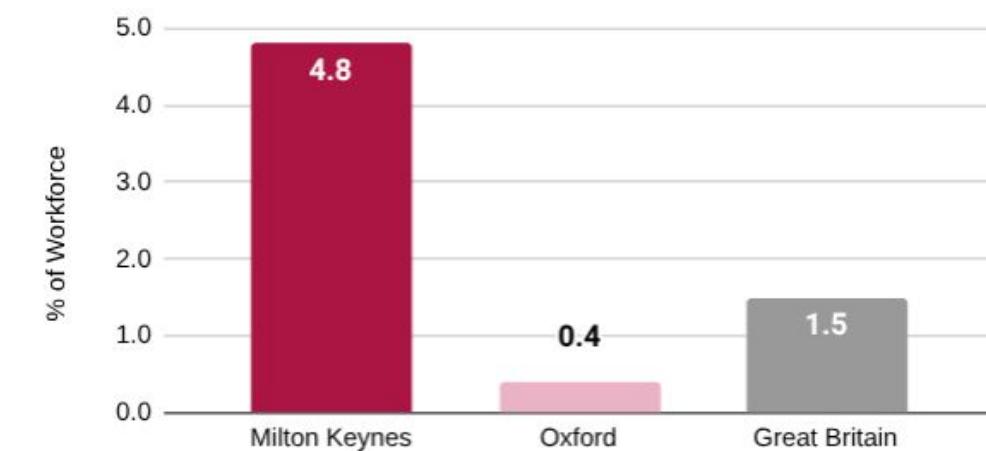
12 X

Financial Svs Workforce (%)
Milton Keynes vs. Oxford

No. of Financial Svs Employees (SIC 64)¹



Financial Svs Employees (SIC 64): % of Workforce¹





Head Office & Consulting Workforce Advantage (No's)¹

1.3 X

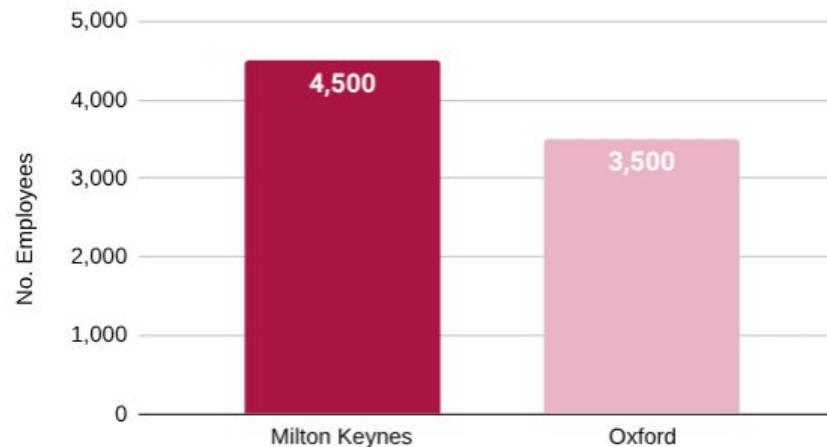
Head Office & Consulting
Workforce Size
Milton Keynes vs. Oxford¹

Head Office & Consulting Workforce Advantage (%)¹

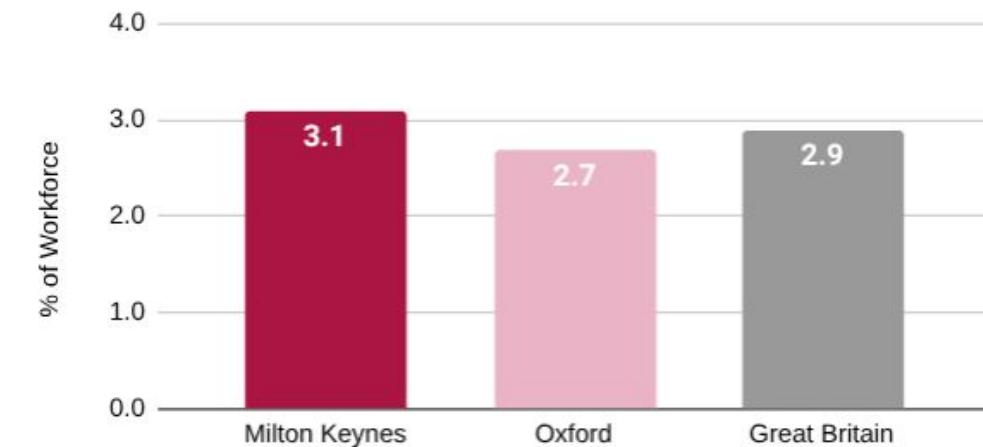
1.1 X

Head Office & Consulting
Workforce (%)
Milton Keynes vs. Oxford

No. of Head Office & Consulting Employees (SIC 70)¹



Head Office & Consulting Employees (SIC 70) % of Workforce¹





Workforce & Skills Challenges in Milton Keynes

- R&D:** In the key R&D classification SIC72 (Scientific R&D) the workforce numbers and percentages for **MK (100 / 0.1%)** are significantly lower than **Oxford (4,000 / 3.1%)**. This aligns with no research university in MK, and Oxford's advantages for startup Tech businesses with university links.¹
- Advanced Manufacturing:** In the key classification SIC26 (Manufacture of computer, electronic and optical products), the numbers and percentages for **MK (350 / 0.2%)** are lower than Oxford **(450 / 0.3%)**. This doesn't reflect the value of MK's Engineering Tech cluster, but also isn't a useful statistic.¹
- Salaries:** While median Gross Annual Pay (2024) is fractionally lower in **MK (£40,974)** than in **Oxford (£41,152)**, it is higher for the 80th Percentile, reflecting IT and Finance salaries (**MK: £62,309** vs. Oxford: **£58,506**). This may reflect high demand for skilled sector labour in MK. Labour costs are therefore not an MK advantage vs. Oxford in key sectors including Tech.²
- Qualifications:** Across RFQs 1+ and 2+ (GCSE / equivalent); RFQ3+ (A-Level / equivalent) and RFQ4+ (higher education / equivalent) Oxford out-performs MK both in terms of No's and %. (Data table available on request).³
- Geographical Areas:** For industry workforce no's (SICs), ONS Travel to Work Area (TTWA) data is worse for MK (vs. Oxford) than LA area (city) data (likely because the Oxford Tech Cluster (e.g. Didcot) extends beyond the city).⁴

Source: (1) ONS BRES, 2023 (latest data); (2) ONS ASHE, Workplace, 2024; (3) ONS APS, 2024; (4) ONS. Both Local Authority (city) and TTWA data was reviewed.



Workforce & Skills: Investment Barriers & Potential Remedies

- Labour and skills constraints in MK, indicated by relatively high salary levels and lower overall qualifications levels, highlight the importance of existing Tech skills strategies, to enable the cluster to achieve its full potential.
- MK's R&D workforce disadvantage vs. Oxford highlights the importance of supporting early-stage businesses, including through incubation and close links with Cranfield and The Open universities (i.e. local research universities).



Milton Keynes & Oxford: Workforce & Skills Scoreboard

Growth Stage	Comments	MK / 5	Oxford / 5
Startup	<ul style="list-style-type: none">Oxford's significantly larger R&D workforce represents an advantage for early-stage Tech businesses with close university ties.	3 / 5	5 / 5
Growth	<ul style="list-style-type: none">MK's substantially larger Digital Tech sector workforce (+ Finance) represents a major advantage for growing businesses.	4 / 5	3 / 5
Expansion	<ul style="list-style-type: none">A large corporate workforce, incorporating multiple specialisations, represents a major advantage for larger businesses.	4 / 5	2 / 5



Typical UK Tech company ecosystem needs

- **Networking:** a vibrant community of Tech firms, startups, and industry events to enable collaboration, knowledge sharing, and partnerships.
- **Innovation Hubs:** incubators and accelerators to provide mentorship, resources, and support for start-up and growing companies.
- **Access to Funding:** access to venture capital, angel investors, and government grants (e.g. R&D or investment) is vital for start-up / growth Tech companies.
- **Supportive Policies & Business Environment:** Local government policies supporting sector development, entrepreneurship, business growth and access to funding enhance the business environment.

Note: other key ecosystem requirements including suitable properties, access to talent and connectivity are covered elsewhere in this report.



Milton Keynes ecosystem advantages for Tech companies

- **Tech Sector Networking** forums and activities in Milton Keynes have continued to develop since the 2022 Tech Ecosystem report. They include:
 - **Protospace:** a council-backed initiative to drive collaboration, knowledge exchange, innovation, growth and support in the MK Tech Ecosystem.

Sources include: Tech Nation Reports; UK Government Digital Strategy; consultancy reports (e.g. McKinsey, Deloitte, PwC)

(cont.)

- **Tech Groups & Events** including [MK Geek Night](#), [MK Tech Week](#) (Sept 2025), [Bletchley AI User Group](#), [Milton Keynes AI Festival](#) and the [AI Safety Summit](#) (Bletchley Park, Nov 2023) leading to the Bletchley Declaration.
- **Innovation Hubs** (accelerators & incubators) in MK or nearby, offer business and funding support, networking and events for companies at early growth stages: [Natwest Accelerator](#) (MK) and [Barclays Eagle Lab Cranfield](#), (incubator, with accommodation, focused on aerospace and aviation technology).¹
- **Milton Keynes Tech Quarter:** as part of its [Tech, Smart City, Digital and Creative Industries Strategy](#), MKCC has plans to create a Smart City, Tech, Design and Innovation Quarter in Central Milton Keynes.
- **MKCC:** innovative support to the Tech sector includes Tech Week and events; the [Smart City Action Plan](#); innovation trials ('testbed'); partnerships with The Open and Cranfield universities; and support for sector networking initiatives.
- **MK Tech Business Funding**
 - MK's emergence as a Tech Hub has attracted Business Angels and Venture Capitalists, with links developing between startups and investors.
 - **Milton Keynes Investors Group (MKIG)** focuses on pre-seed / seed capital funding, hosts regular investment pitch and networking events, and provide support through startup clinics.
 - **Government Funding** includes the [Midlands Engine Investment Fund II](#) (debt finance from £25k to £2m and equity investment up to £5m) and the [National Security Strategic Investment Fund](#) for dual-use technologies.

Source: (1) Invest MK



Milton Keynes Key Tech Ecosystem Strengths & Aligned Business Specialisations (to inform business targeting)

Tech Theme	Capability	Aligned Business Specialisations
Smart City Technologies	<ul style="list-style-type: none">A leading testbed for Smart City tech to enhance urban living, including autonomous vehicles, drone deliveries, a robust BT/EE 5G standalone (5G SA) network and city-wide sensors.With a strategic city focus on carbon reduction and sustainable urban development.	<ul style="list-style-type: none">Intelligent transport systems, urban management, energy efficiency, sustainable urban development, and IoT applications.
AI and Data Analytics	<ul style="list-style-type: none">AI for diverse applications including predictive analytics in urban planning and public health, enabled by data infrastructure including the MK Data Hub.	<ul style="list-style-type: none">AI for diverse applications including healthcare solutions, business intelligence and predictive analytics
Autonomous Systems & Robotics	<ul style="list-style-type: none">Technology trials include robots for home assistance, logistics and delivery services, demonstrating the integration of robotics into everyday life.The Smart City Robotics Competition showcases advancements in robotics.	<ul style="list-style-type: none">Robotics, autonomous vehicles, and related software and hardware.
Fintech	<ul style="list-style-type: none">A strong, growing sector, enabled by MK's Tech ecosystem. Specialisations include digital banking, payment solutions, and financial services innovation.Anchored by Santander. Fintech companies include Allica Bank and FumoPay.	<ul style="list-style-type: none">Fintech startups seeking a dynamic, supportive ecosystem including sector expertise, networks and co-working spaces.
Healthtech	<ul style="list-style-type: none">Smart City 'test bed', using AI, IoT, data analytics, data science, and 5G to improve healthcare delivery and patient outcomes.Healthtech pilots and programmes: MK University Hospital. Digitising Social Care	<ul style="list-style-type: none">Businesses seeking a supportive, test bed environment and Tech / healthcare partnerships for new healthtech innovations.
Engineering Tech	<ul style="list-style-type: none">Smart manufacturing technologies - including digitalisation, automation, robotics, and IoT - to maximise productivity and profitability.High-performance engineering in sectors including automotive / motorsport.	<ul style="list-style-type: none">Businesses seeking to implement advanced digitalisation, automation or high-performance technologies; and access a specialised Engineering Tech knowledge ecosystem.



Milton Keynes Tech Ecosystem: Key Companies (examples)

Key Tech-focused Company	Tech-focused Sector / Cluster			
	Dig & Tech	Adv Man	Fin Svs	Defence
<u>ABB Robotics</u> (Autonomous Systems & Robotics)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Academy of Robotics</u> (Auton. Systems & Robotics)	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<u>Accelera by Cummins</u> (Clean Energy)		<input type="checkbox"/>		
<u>Alimi</u> (AI)	<input type="checkbox"/>			
<u>Allica Bank</u> (Fintech)	<input type="checkbox"/>		<input type="checkbox"/>	
<u>Connected Places Catapult</u> (Smart City Tech)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Ekco</u> (Cloud / Cybersecurity)	<input type="checkbox"/>			
<u>FumoPay</u> (Fintech)	<input type="checkbox"/>		<input type="checkbox"/>	
<u>Helix</u> (formerly Integral Powertrain) (Clean Energy)		<input type="checkbox"/>		
<u>HM Gov't Communications Centre</u> (Cybersecurity)	<input type="checkbox"/>			<input type="checkbox"/>
<u>ProDrive</u> (Advanced Automotive / Tech)		<input type="checkbox"/>		
<u>Red Bull Racing / Advanced Technologies</u> (Adv Auto)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Santander UK</u> (Fintech)	<input type="checkbox"/>		<input type="checkbox"/>	
<u>Solifi</u> (Fintech)	<input type="checkbox"/>		<input type="checkbox"/>	
<u>Starship Technologies</u> (Auton. Systems & Robotics)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Xero</u> (Fintech)	<input type="checkbox"/>		<input type="checkbox"/>	
<u>Chemetall</u> (NDT) (<i>Bletchley</i>)		<input type="checkbox"/>		
<u>Envicsics</u> (Head-Up Displays) (<i>Bletchley</i>)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Marshall Amplification</u> (Electronics) (<i>Bletchley</i>)		<input type="checkbox"/>		
<u>Panasonic</u> (<i>Bletchley</i>)				
<u>Rockwell Automation</u> (<i>Bletchley</i>)	<input type="checkbox"/>	<input type="checkbox"/>		
<u>Zoho</u> (<i>Bletchley</i>)	<input type="checkbox"/>			



Milton Keynes Smart City: Unique Features & Benefits

MK is at the forefront of **Smart City** innovation - to improve the sustainability and efficiency of public services, urban management and transportation.

- **Smart Transportation:** technology trials have included autonomous vehicles, self-driving shuttles and drone deliveries - to improve mobility, reduce congestion, and make transportation more efficient and accessible.
- **Advanced Connectivity (5G):** MK's robust 5G network supports diverse Smart City applications - enabling real-time data collection and communication, and facilitating improved public services and urban management.
- **MK's Smart City Action Plan** encourages innovative trials to enable sustainable development and tackle urban challenges in areas including public health, energy efficiency and environmental sustainability.
- **Research Collaborations** feature strong partnerships between local R&D providers (e.g. The Open University and Cranfield University), businesses, and government agencies. Initiatives including the Open University-led MK:Smart enhance R&D projects to maintain Smart City technological leadership.
- **Community Engagement:** citizens are actively encouraged to participate in Smart City initiatives and urban innovation, interacting with new technologies through platforms including the Experience Centre.

Sources include: MK:Smart; IoTM2M Council; centre:mk; IoT World Today



Industry Clustering in Milton Keynes (Location Quotients)

Data for Milton Keynes shows workforce concentrations in the Digital Tech and Financial Services sectors that are significantly higher than both Oxford (city) and the Great Britain average. This demonstrates high levels of industry clustering and developed industry ecosystems.

Digital Tech

- In the Digital Tech sector (SIC62), Milton Keynes benefits from a workforce concentration that is **2 X Oxford**, and **1.8 X the Great Britain average**.

Financial Services / Fintech

- In the Financial Services sector (SIC64), Milton Keynes' workforce concentration is **15 X Oxford**, and **3.1 X the Great Britain average**.¹

Bletchley is a locus of clustering in Digital Tech (115 IT companies), Advanced Manufacturing (including automotive and aviation), and Financial Services, with significant workforce concentrations (LQs) in key Tech-related sectors.

SIC Code	Description	LQ
27	Manufacture of electrical equipment	5.6
26	Manufacture of computer, electronic & optical products	3.2
29	Manufacture of motor vehicles	2.0
61	Telecommunication	1.9

Sources: (1) ONS BRES, 2023 (latest data); (2) Bletchley & FS Market Research, 2023



Workforce Productivity in Milton Keynes

- Industry clustering is often associated with increased productivity, and Milton Keynes is a high-productivity business location.
- In 2020, the city ranked in the top-20 of 343 Built Up Areas (BUASD) in England for estimated GVA per filled job. At £89,210, MK's estimated GVA per filled job was notably higher than Oxford's (£51,000).²



About Industry Clustering & Location Quotients

Industry Clustering refers to the geographic concentration of interconnected businesses, suppliers, and associated institutions in an industry sector, and is closely related to the concept of a local industry ecosystem.

- **Key Benefits** of industry clustering include increased collaboration and innovation; and sharing of knowledge, resources and best practice; leading to improved efficiency, productivity, competitiveness and attractiveness to investors.
- **Location Quotients (LQs)** are an established industry clustering metric, measuring the ratio of local industry sector workforce numbers to the GB average (represented by 1.0).³

Sources: (3) Sources include ONS and Michael Porter



Digital Tech Industry Clustering (SIC62 LQs)¹

2 X

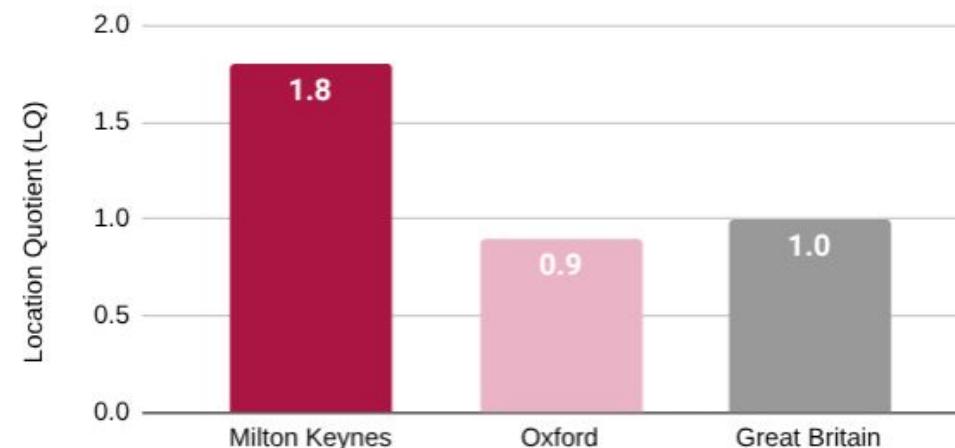
Milton Keynes Digital Tech
Workforce Concentration
vs. Oxford (LQ)¹

Financial Services Industry Clustering (SIC64 LQs)¹

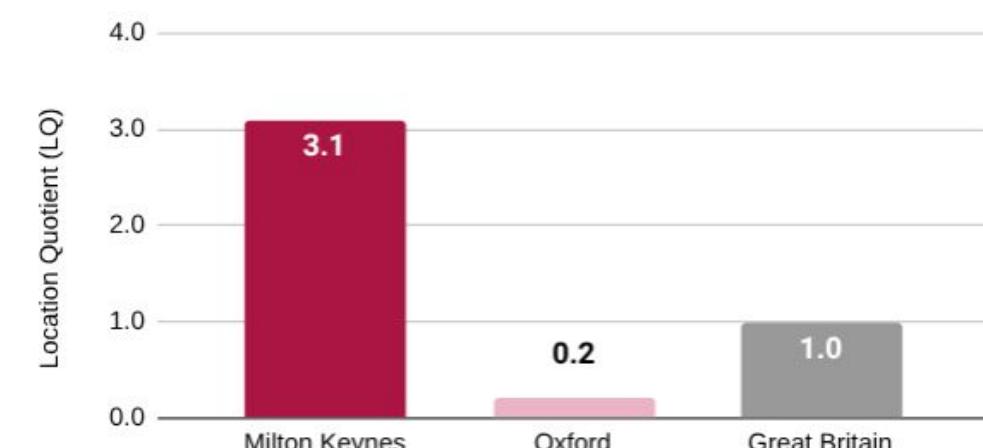
15 X

Milton Keynes Financial Sv
Workforce Concentration
vs. Oxford (LQ)¹

Digital Tech Clustering Comparison (SIC 62 LQs)¹



Financial Sv Clustering Comparison (SIC 64 LQs)¹





Business Environment Advantages (Centre for Cities)

The Centre for Cities report [Cities Outlook 2025](#) highlights Milton Keynes' high performance, including versus Oxford, in the following key areas.

- MK ranks #3 among UK cities for its business start-up rate (above Oxford).
- MK ranks #4 among UK cities for New Economy Firms Per 10,000 Working Age Population (above Oxford).
- MK ranks #9 among UK cities UK for GVA Per Hour (Productivity) (above Oxford)
- MK ranks #3 among UK cities for Population Growth (above Oxford)
- MK ranks #4 among UK cities for the number of businesses ('business stock') per 10,000 population (above Oxford).
- MK ranks #1 among UK cities for Housing Stock Growth (above Oxford)

According to Centre for Cities, Milton Keynes out-performs Oxford based on key metrics relating to:

- ✓ Business Start-ups
- ✓ Tech Business Density
- ✓ Workforce Productivity
- ✓ City Growth
- ✓ Overall Business Density
- ✓ Housing Supply



Tech Ecosystem Challenges in Milton Keynes

- ! The 2022 MK Tech Ecosystem Report highlighted Central MK's lack (then) of Tech sector-focused accelerators, incubators and a technology hub.¹
- ! Central Milton Keynes continues to lack Tech sector-focused accelerators and incubators. The Natwest Accelerator is cross-sector, while Barclays Eagle Labs is in Cranfield, outside CMK).²
- ! Oxford's tech investment community is significantly more developed than MK's, based on long-standing connections between experienced investors and the university's consistent pipeline of innovative startup businesses. E.g. Oxford Capital alone has invested over £500 million in more than 100 technology companies over 25 years. Also see (e.g.) Oxford Science Enterprises, The Oxford Fund, and Oxford Innovation Finance. As well as developing this infrastructure in MK, messaging should focus on East West Rail improving access to the Oxford investment community.
- ! Overall (and unsurprisingly) Oxford's Tech Ecosystem is significantly more developed than that of Milton Keynes. However, MK has significant strengths in niche areas including Smart City technologies, AI, and the 'city test bed' proposition. Combined with business scale-up and cost benefits, these represent a distinctive and powerful proposition that should be focused on.



MK Tech Ecosystem Investment Barriers & Potential Remedies

- The development of a technology hub and business incubation capacity continues to be advisable (see 2022 Tech Ecosystem report) - with a focus on developing indigenous start-ups as a priority, as well as inward investment attraction.
- The MK Tech cluster's impressive growth supports the case for a strategic focus on building the city's investment community and infrastructure.



Milton Keynes & Oxford: Tech Ecosystem Scoreboard

Growth Stage	Comments	MK / 5	Oxford / 5
Startup	<ul style="list-style-type: none">• Oxford's strengths in key areas including R&D, business incubation and funding are significant advantages for start-ups.	3 / 5	5 / 5
Growth	<ul style="list-style-type: none">• MK's developed Tech cluster, workforce, network and 'testbed' environment are key advantages for growth businesses.	4 / 5	4 / 5
Expansion	<ul style="list-style-type: none">• MK's benefits for growth businesses are complemented by the wider clustering benefits of MK as a major business city.	5 / 5	3 / 5



Typical UK Tech company R&D partnership needs

- **Access to Expertise:** specialised knowledge and skills from academic researchers in areas including technology development and data analysis.
- **Research Facilities and Equipment:** access to laboratories, testing facilities, and advanced equipment for experimentation and prototype development.
- **Funding Support:** financial assistance through grants or funding opportunities available for collaborative projects.
- **Intellectual Property (IP) Management:** Clear agreements regarding IP rights and ownership to protect innovations developed during the collaboration.
- **Networking Opportunities:** facilitation of links to industry and investor networks to help startups gain visibility and support.
- **Training and Development:** access to university training programs in essential skills including business management, product development, and marketing.
- **Commercialisation Support:** guidance on how to commercialise research outcomes and navigate the market, to turn innovations into viable products.

Sources include: UK Research and Innovation (UKRI); Innovate UK



Milton Keynes R&D / Technology solutions for Tech companies

- **Cranfield University** (10 miles from MK) is a leading global institution for specialist research in Engineering Tech (including aviation, automotive and energy), Digital Tech (including AI and data science) and Business & Management. (See the Workforce & Skills section of this report for rankings).
 - 88% of Cranfield's research is world-leading or internationally excellent.^{1,2} The university provides industry partner with access to world-class knowledge, expertise, facilities and equipment; takes R&D projects from concept to delivery; and applies emerging research to industry needs.³
- **Barclays Eagle Lab Cranfield** provides comprehensive incubation services for growing Tech businesses: flexible, serviced space; expertise, mentoring and networks; digital product design and validation; business funding and scale-up support. Key specialisations include AI & Emerging Tech, and Digital Security.
- **Connected Places Catapult** is an elite technology and innovation centre providing world-class facilities (e.g. IT, modelling rooms and collaboration spaces) for innovative enterprises working to improve transport systems, urban innovation, and digital infrastructure. Programs support startups and scale-ups with funding, strategic partnerships, and real-world testing.^{4,5}
- **The Open University** is the lead partner in the MK:Smart Smart city project (see the Tech Ecosystem section of this report).

Source: (1) [Cranfield University-Rankings](#); (2) Research Excellence Framework (REF) 2021; (3) [Cranfield University - Industry Collaboration](#); (4) MK & AI Report, 2020; (5) [Scaleup Institute](#)



R&D & Technology Challenges

- ! Although Cranfield University is located just 10 miles from Milton Keynes, the city itself is not home to a leading research university.
- ! Oxford University regularly features in the top-5 of global university rankings. It is currently 1st in the [THE World University Rankings 2025](#), and 4th in the [QS World University Rankings 2026](#).
- ! In the most recent Research Excellence Framework ([REF 2021](#)), Oxford University achieved 4* level ('world-leading') for 81% of Computer Science and Informatics research, and 71% of Engineering research.



MK R&D/Technology Investment Barriers & Potential Remedies

Oxford's clear leadership in Tech research is obvious and unlikely to be challenged. However, MK can develop its research proposition by:

- Continuing to develop collaborative research solutions for businesses with Cranfield University and The Open University, including through a technology hub, business incubators, and collaborative programmes.
- Focusing on MK's specific / niche areas of R&D excellence (e.g. AI and Smart City Technologies).
- Focusing on MK's distinctive strengths in the later stages of R&D: applied research, development, testing and validation (e.g. the city 'test bed').



Milton Keynes & Oxford: R&D & Technology Scoreboard

R&D Focus	Comments	MK / 5	Oxford / 5
Applied Research	<ul style="list-style-type: none">• Oxford is the clear leader in terms of the scale and quality of applied research, and infrastructure for collaborations.	3 / 5	5 / 5
Testbed environment	<ul style="list-style-type: none">• MK's unique testing and validation environment is outstanding for companies with aligned requirements.	4 / 5	3 / 5



Typical UK Tech company data connectivity needs

Data Connectivity

- **High-Speed Internet Access:** including access to fibre-optic broadband and 5G networks.
- **Multiple Internet Service Providers (ISPs):** enabling price/service competition and network redundancy - for backup services and continuous operations.
- **Smart Infrastructure:** integrating smart technologies in transport connectivity (e.g. IoT for traffic management) can enhance business operational efficiency.

Milton Keynes connectivity advantages for Tech companies

Data Connectivity

- **Internet Access:** Milton Keynes' digital infrastructure and connectivity advantages include 99.4% superfast (over 30 Mbps) and fibre broadband.¹
- **Multiple ISPs:** Milton Keynes benefits from multiple internet service providers (ISPs) offering a range of broadband options.²
- **5G Mobile Network:** Milton Keynes is among the first cities in the UK to benefit from EE's 5G Standalone (5G SA) network.³
- **Smart City infrastructure:** integrates 5G and IoT technologies, enabling business operational efficiencies as well as Tech R&D 'test bed' activities.³



Typical UK Tech company transport connectivity needs

Transport Connectivity

- Efficient Road & Rail Connections:** to key commercial centres, industry hubs and clusters, financial centres, and customer markets (including minimal road congestion).
- Fast Airport Access:** for European and worldwide market access
- Efficient Local Public Transport:** to facilitate operations and commuting
- Active Travel Options** including viable walking routes and cycle lanes enable sustainable and low-stress commuting, and enhance quality of life.¹



MK / Bletchley & Oxford transport connectivity comparison ^{2,3}

By Road	Hrs. from Milton Keynes	Hrs. from Bletchley	Hrs. from Oxford
Destination			
London	1.20	1.20	1.25
Birmingham	1.10	1.15	1.25
Manchester	2.30	2.40	2.40
Cambridge	1.05	1.05	1.50
London Heathrow Airport	1.20	1.20	0.55
Birmingham Airport	1.00	1.00	1.10
London Luton Airport	0.30	0.30	1.10

By Rail	Hrs. from Milton Keynes	Hrs. from Bletchley	Hrs. from Oxford
Destination			
London	0.32	0.37	0.55
Birmingham	0.56	1.09	1.04
Manchester	1.41	1.55	2.50
Cambridge	1.55	1.50	2.13
London Heathrow Airport	1.26	1.30	1.35
Birmingham Airport	0.52	1.05	1.07
London Luton Airport	1.10 (bus)	1.20 (rail / bus)	2.15 (bus)

Sources: (1) UK Government Digital Development Strategy, 2024-2030;

Sources: (2) Road: Google Maps, 11am Tues departure; (3) Rail: Google Maps, Tues Departures from 8am



MK transport connectivity advantages for Tech companies

Road Connectivity

- Milton Keynes' unique (in the UK) grid road system enables efficient traffic flow, reduced congestion and journey times, and direct M1 access.
- In comparison with Oxford, an MK location enables faster road access to key destinations including London (1.20 hrs), Birmingham, Manchester, Cambridge, and the nearest airport (Luton is just 30 minutes from MK).¹

Rail Connectivity

- In comparison with Oxford, an MK location enables faster rail access to key destinations including London (0.32 hrs), Birmingham, Manchester, Cambridge, London Heathrow Airport (1.26 hrs) and Birmingham Airport.²

Smart City Infrastructure

- Milton Keynes is at the forefront of Smart City infrastructure and technologies, with a focus on maximising local transport efficiency - delivering potential operational and productivity benefits for companies in the city.³

Active Travel - Walking & Cycling

- As a modern, planned city, Milton Keynes was built with active travel in mind. The city's Redways are dedicated walking and cycling routes, segregated from road traffic for safety, comfort and efficiency.

Sources: (1) Road: Google Maps, 11am departure, Tues 24.6.25; (2) Rail: Google Maps, Departures from 8am, Tues 24.6.25 (3) IoT M2M Council



MK transport connectivity advantages for Tech companies

Connectivity to Regional Knowledge Hubs & Clusters

- Central London's finance and technology hubs are accessible in just 32 minutes by rail from MK Central station (vs. 55 minutes from Oxford).²
- Milton Keynes' central location between Oxford and Cambridge positions the city centrally within the Oxford-Cambridge Arc. and within the London-Oxford-Cambridge 'Research Golden Triangle', with excellent connectivity to key locations across the cluster.
- Milton Keynes is centrally located within Central England's world-leading Engineering Tech cluster ('Motorsport Valley') - 30 minutes from Silverstone.¹



East West Rail benefits for MK-based Businesses

The East West Rail scheme will re-establish a rail link between Cambridge and Oxford, with Milton Keynes at its centre. East West Rail will:

- **Cut public transport travel times:** the current Oxford-Milton Keynes coach service takes 1.50 hours at peak times. With East West Rail, this could be reduced to 45 minutes.¹
- **Enable business and career growth in MK:** Oxford and Cambridge are expensive and growth-constrained. In contrast, Milton Keynes is cost-effective, with space for business expansion and affordable homes. Transforming rail connectivity will make Milton Keynes a highly attractive location for Tech businesses and talent with links to Oxford.¹
- **Enable Tech cluster development:** Oxford and Cambridge are world-leading cities for science and technology. Milton Keynes is the high-growth city centrally located between the two. Improving transport connectivity across this growth corridor will help the Oxford to Cambridge region maximise 'agglomeration benefits', through business scale-ups, supply chain development, inward investment, and talent attraction. According to the Oxford to Cambridge Partnership, this could add £50 billion to regional GVA in the next few years. Milton Keynes-based Tech businesses will be key beneficiaries.^{1,2}

- **Improve sustainability and quality of life:** East West Rail will mean shorter, more comfortable commutes, less time spent in traffic, safer and less-congested roads, lower carbon emissions and cleaner air. It will also enable people to live in more affordable, commutable locations, including Milton Keynes. The aim for EWR is to become a net zero carbon railway.¹
- **Improve national and international connectivity:** EWR will intersect with most of the UK's main rail lines, including the East Coast Main Line, Midland Main Line and West Coast Main Line. For Milton Keynes residents, this will mean improved access to cities including Oxford, Cambridge, Leeds and Manchester, and Luton and Stansted airports.^{1,3}

Bletchley - A Strategic Rail Hub

- East West Rail will intersect with the West Coast Main Line at Bletchley Station, establishing Bletchley (within Milton Keynes) as a key UK rail hub.
- The new line will enable faster, direct connections between Bletchley / Milton Keynes and East West Rail stations including Oxford, Cambridge, Bicester and Bedford, as well faster links from those locations to WCML destinations.
- Bletchley will benefit from direct, faster connections to West coast Mainline destinations including London, Birmingham and Manchester, further enhancing the town's attractiveness as a Tech business location.^{4,5}



Connectivity: Observations & Challenges

Data Connectivity Observations: Milton Keynes vs. Oxford

- Both Oxford and Milton Keynes offer strong broadband and mobile internet connectivity, benefiting from significant investments in fibre and 5G infrastructure. Both cities are well-positioned to support businesses with high-speed internet and smart infrastructure. Milton Keynes' advanced Smart City infrastructure and ecosystem is, however, a distinctive USP.^{1,2}

Transport Connectivity: Milton Keynes Challenges

! Milton Keynes offers excellent, multimodal transport connectivity. Oxford's only significant advantage is for road connectivity to London Heathrow Airport (**0.55 hrs vs. 1.20 hrs** for MK).



MK Connectivity Investment Barriers & Potential Remedies

- Milton Keynes benefits from excellent data and transport connectivity in comparison with Oxford and many other competitor UK locations.
- To maximise investment opportunities, these benefits should be highlighted and communicated clearly, at the heart of the city's inward investment value proposition.



Milton Keynes & Oxford: Connectivity Scoreboard

	Comments	MK / 5	Oxford / 5
Data	<ul style="list-style-type: none">While both MK and Oxford offer excellent fibre and 5G digital connectivity, MK's Smart City infrastructure provides an edge.	5 / 5	4 / 5
Transport	<ul style="list-style-type: none">For transport times, MK beats Oxford for almost all modes and metrics - further enhanced by active travel and E W Rail.	5 / 5	4 / 5



Typical UK Tech worker quality of life needs

Highly skilled and qualified UK Tech sector workers typically have the following demands and expectations from potential place to live and work.

- **A Dynamic Tech Cluster:** presenting diverse opportunities for career and skills development, networking and innovation.
- **Affordability:** notably house prices and rents, combined with career prospects.
- **Civic & Cultural Amenities:** including good schools, art galleries, theatres, music venues, cultural festivals; and sports facilities, events and activities.
- **A Vibrant Social Scene:** including diverse shopping, restaurants and cafes (with independent businesses).
- **Environmental Benefits:** including access to parks and green spaces; a mix of urban and natural environments; low congestion; and short commuting times.
- **Fast, Reliable Data Connectivity:** including to enable home and hybrid working.
- **Diversity and Inclusion:** an inclusive, diverse, open and welcoming social environment for incoming professionals from a range of backgrounds.

Sources include: [Barclays Eagle Labs](#); [newpossible.io](#); What Workers Want Survey, 2025; Digital Defynd; Reed.com



Milton Keynes quality of life benefits for Tech workers

Milton Keynes offers a range of advantages for UK Tech workers, including those currently based in Oxford, seeking a place to live and work:

- **A Dynamic Tech Cluster:** combining a high concentration of diverse businesses and organisations with networking and innovation opportunities.
- **Average House Prices** are currently £127k lower in Milton Keynes than in Oxford, and £38k lower than the South East region average.¹
- **Housing Affordability** is significantly better in Milton Keynes (8.3 X average income) than in Oxford (11.4 X) or the South East average (9.7 X).^{1,2}
- **Civic & Cultural Amenities** include high-performing schools³; diverse shopping ([centre:mk](#)), 350+ varied [restaurants](#), [Milton Keynes Theatre](#), [MK Gallery](#) (art gallery); and major entertainment and sporting venues including [Snozone The National Bowl](#) (concerts) and [Stadium MK](#) (MK Dons football).⁴
- **Environmental Benefits:** MK is a family-friendly, green city with extensive parks, lakes and open spaces; designed for low congestion and active travel with a grid road system and dedicated redways (cycling and walking). Smart City innovations support efficient public transport and connectivity.
- **Data Connectivity:** 99.4% superfast (over 30 Mbps) and fibre broadband.⁵
- **Diversity and Inclusion:** MK is a diverse and welcoming city. Bletchley, for example, has a more diverse population than England overall.⁶

Source: (1) UK Land Registry; (2) ONS ASHE (Median Annual Pay); (3) [MK Citizen](#); (4) [Destination Milton Keynes](#); (5) Tech, Smart City, Digital, and Creative Industries Strategy, 2024 – 2029; (6) Bletchley & FS Market Research, 2023



Housing Cost Savings in Milton Keynes

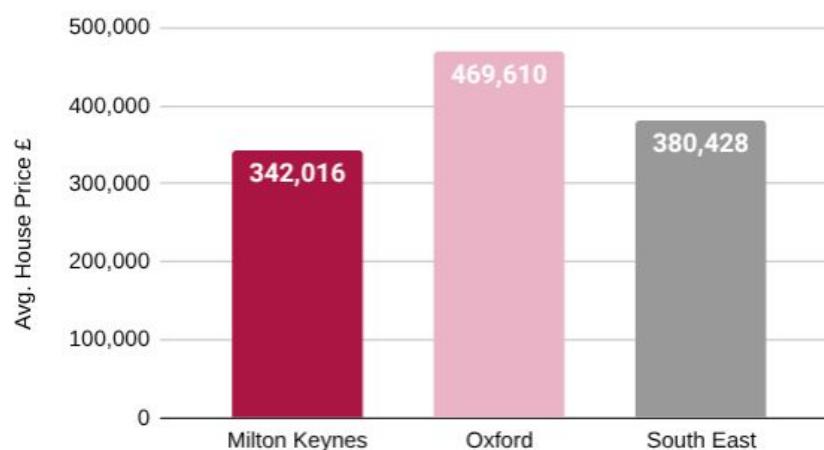
£127k

Average House Price Saving
Milton Keynes vs. Oxford
(April 2025)¹

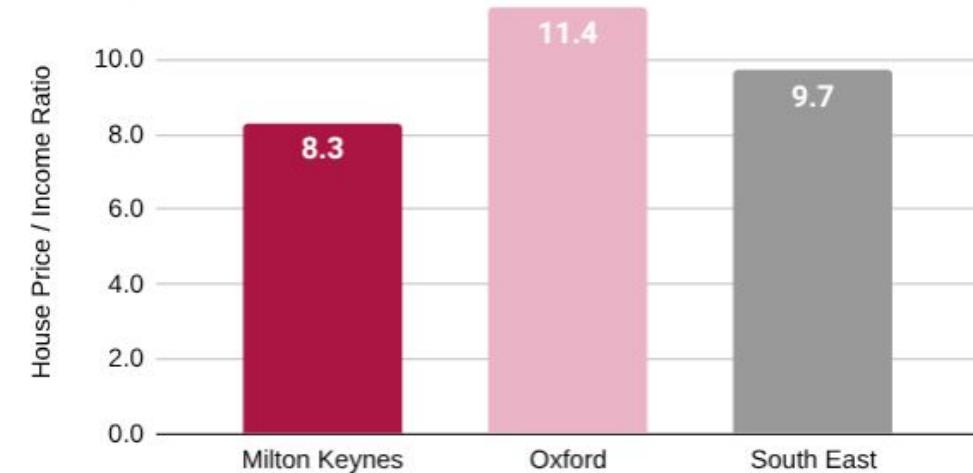
£38k

Average House Price Saving
Milton Keynes vs. South East
(April 2025)¹

Average House Prices (£) April 2025¹



Housing Affordability (HPI Ratio) 2025^{1,2}





Quality of Life: Observations & Challenges

Quality of Life: Milton Keynes Challenges vs. Oxford

! As a major historical, cultural, academic and educational city (as well as being an important Tech hub), Oxford offers a rich cultural heritage including leading schools, museums, and theatres. The city's compact centre offers a lively social scene and intellectual environment including diverse dining, pubs and cafes, and independent shops.

These are all location features typically considered desirable by highly educated workers in sectors including Tech, and areas in which Milton Keynes may not compete on Oxford's own terms.



MK Quality of Life Relocation Barriers & Potential Remedies

- To attract younger Tech professionals, the city's cultural, lifestyle, Tech networking and environmental benefits can be highlighted in marketing.
- Perhaps more importantly, MK offers distinctive advantages for mid-career Tech workers including career opportunities, affordability, a salubrious environment, work-life balance and overall quality of life.
- These mid-career advantages typically align with the family needs of workers

in the same life stage, including family-focused housing, amenities and outdoor environments. They should, therefore, be a central part of a distinctive location offer for growth businesses and their personnel.

Milton Keynes & Oxford: Quality of Life Scoreboard

	Comments	MK / 5	Oxford / 5
Early Career	<ul style="list-style-type: none">Oxford's cultural & lifestyle offer is highly attractive to early-career Tech workers.	5 / 5	3 / 5
Mid-Career	<ul style="list-style-type: none">MK offers clear advantages for mid-career residents, including those with families:Career growth in a leading Tech cluster.'Green city' quality of life benefits, including linear parks for walking & cycling in nature.A diverse leisure offer: city centre shops & restaurants; cultural, arts & sports attractions - theatre, gallery, a year-round cultural & arts events calendar; family-oriented sports & events venues - e.g. Xscape & Stadium MK.Housing cost & affordability advantages.Recognised in rankings: the UK's No.2 'Best Place to Live & Work' (LSH Vitality Index, 2025).	4 / 5	3 / 5



Inward Investment Marketing

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