



GREATER MANCHESTER LOCAL ENTERPRISE PARTNERSHIP BOARD

SUBJECT: GM HS2 and NPR Growth Strategies

DATE: 13 November 2017

FROM: Dr Jon Lamonte, CEO, TfGM

1. Introduction and Background

- 1.1 In autumn 2016, TfGM and Manchester CC were awarded £2.5m funding by DCLG to develop Growth Strategies around the HS2 stations at Manchester Piccadilly and Manchester Airport.
- 1.2 The Growth Strategies aim to capitalise on the opportunity of HS2 and NPR by proposing a series of complementary investments in order to bring maximum benefits to residents, local businesses and to the wider economy.
- 1.3 TfGM has worked with Manchester City Council, Trafford Council and a consultant team to undertake work to support the 4 core “Pillars” of the Growth Strategies. These provide a framework for understanding how the economic growth potential of both HS2 and Northern Powerhouse Rail (NPR) can be harnessed. They are:
 -) Station design and infrastructure;
 -) Wider connectivity;
 -) Regeneration around the station; and
 -) Skills and employability
- 1.4 The Growth Strategies identify the enablement of ambitious development around the two new HS2 stations at Manchester Piccadilly and Manchester Airport, and wider connectivity investment to spread the benefits throughout the conurbation. A comprehensive GM skills strategy underpins the work to maximise the benefits to GM residents.

- 1.5 The output of that work has now been brought together into a summary document which was approved by GMCA on 27th October and will subsequently be issued to DCLG in November.

2. The Summary Document

- 2.1 The core outputs of the Growth Strategies are a summary document and a business case to government outlining the scale of ambition that can be realised by harnessing the arrival of HS2 and NPR into GM.

- 2.2 The summary document is GM's outward-facing document which explains the Growth Strategies and the potential for growth by investing in infrastructure at Piccadilly and the Airport. It also explains how the strategies will be delivered and the role both GM and the Government will need to play in delivering this ambitious plan.

3. Growth Ambitions

- 3.1 The Northern Powerhouse Independent Economic Review set out a vision of a “transformational” economic future for the North which could deliver a 15% increase in GVA, a 4% increase in productivity and 850,000 more jobs by 2050. To deliver this scale of growth, however, significant investment would need to be made in skills, innovation and transport connectivity.

- 3.2 The growth strategy demonstrates that the benefits of investing in HS2 and NPR serving Manchester Airport and Manchester City Centre, supported by a wider transport investment package, will not just be felt in the local economy, but will also act as a catalyst for delivering the long-term growth ambitions of the North of England and the UK.

- 3.3 The step change in connectivity that will be delivered by both HS2 and NPR is essential for supporting the ambition for an increasingly successful Northern Powerhouse economy, with Greater Manchester at its heart. These major transport investments will help the economic output of Greater Manchester to more than double to £132 billion by 2050.

4. The importance of well-designed and fully integrated stations

- 4.1 Well designed and fully integrated stations are at the core of our growth strategy. At Piccadilly, the work demonstrates the case for a fully integrated HS2, NPR, local rail and Metrolink station, designed alongside wider development, infrastructure and public realm proposals, can act as a magnet for development, attracting new businesses in key sectors and providing significant job opportunities for Greater Manchester residents.

4.2 Work undertaken at the Airport identifies that provision of an integrated station with seamless connections between domestic and international travel is critical in supporting and growing the global connectivity provided by the airport, and the productivity gains this generates for businesses within the airport's catchment.

5. Identification of wider connectivity opportunities

5.1 Within the context of the 2040 Strategy, our growth strategy is designed to maximise the benefits of the new high speed rail services to Greater Manchester by ensuring full integration with the existing and future transport network.

5.2 The Growth Strategy will transform the role of Manchester Piccadilly as a sub-regional and national transport hub, as well as a major commercial site at the heart of the city centre. It has the potential to become a key professional and financial services business location, with opportunities for expanding residential space. However, a well-connected Piccadilly will also ensure that the benefits of high-speed links to London and NPR connections across the north are spread across the entire city region. This is the basis for our wider connectivity plans.

5.3 The Piccadilly proposals identified to maximise the connectivity of Piccadilly include: enhanced walking and cycling routes to and from the station and Piccadilly area, including significant public realm investment; improved cross-city bus provision; and major investment in new Metrolink and rail capacity, including the potential for tunnelled metro services.

5.4 Under our Growth Strategy, Manchester Airport will become an integrated and highly connected public transport interchange for Greater Manchester, acting as a global gateway to the north. The area around Manchester Airport, including Airport City, which sits within the Greater Manchester Enterprise Zone, has also been identified for significant development growth in terms of offices, global logistics, advanced manufacturing, hospitality and complementary commercial and residential development.

5.5 Improvements to wider transport links to the Airport will be critical to maximise the opportunities brought by the arrival of HS2 and NPR, with a particular focus on providing enhanced connectivity to the Airport from across Greater Manchester. Proposed improvements (subject to full feasibility assessment) include new cycling and bus links; improved east-west Metrolink connections; platform lengthening at the Airport station; and highways improvements, including capacity enhancements at J5 and 6 of the M56 and new and improved link roads to the HS2 station.

6. Skills Strategy

6.1 Building on the High Speed Rail Skills Strategy, under the Growth Strategies we have developed a Greater Manchester focused skills strategy that translates the five priorities set out in the North West High Speed Rail Strategy and Action Plan into a Greater Manchester context with regard for both HS2 and NPR, focused on interventions around the following themes:

-) Creation of a Greater Manchester STEM Framework;
-) Delivery of an enhanced Greater Manchester Careers Service and Strategy;
-) The development of Vocational Centres of Excellence;
-) A Shared Apprenticeship Scheme; and
-) The championing of local employment in HS2 related activities through social value clauses, contractor commitments, funding initiatives and procurement framework opportunities.

7. Approach To Delivery

7.1 Building on the success of our existing Greater Manchester Transport Fund, we have the basis for appropriate structures to lead the realisation of these plans going forward. Some of our ambitions can be delivered through local initiatives, through existing structures and plans already in place, while others will benefit from increased collaboration with other sections of Government.

7.2 The Growth Strategies will provide a platform for new models of collaboration across a range of partners – local, regional and national – to ensure fully joined up future detailed planning and programme delivery at our two stations. Officers are now starting work with government officials and other key stakeholders to develop these models. Further advice will be brought to members in due course.

8. Next Steps

8.1 Following broad approval that was given to the attached draft document by GMCA, Manchester CC and Trafford MBC, a fully designed document, supported by images and infographics is being prepared. This will be agreed under delegated approval with GMCA, MCC and TMBC to ensure that it meets the specific positions of the three bodies.

8.2 A future work programme with HS2 Ltd, Government and other key partners will be developed on the basis of the Growth Strategies work to

date. Further advice on these arrangements will be brought to members in due course.

9. Recommendations

9.1 Members are requested to:

) Note and comment on the contents of the report.

Appendix 1

Greater Manchester Growth Strategy Summary Document

Foreword

This is an exciting time to be in Greater Manchester.

The city region has always been known for its progressive and innovative spirit, technological excellence, and cultural, sporting and scientific achievements. Now there is a real opportunity for us to build on recent success and cement our position as a leading centre of UK growth at the heart of the Northern Powerhouse.

By 2033, High Speed Two (HS2) will halve the journey time between Manchester and London, bringing businesses closer together and further promoting our city region as a world class business location. Northern Powerhouse Rail (NPR) will position Greater Manchester at the core of a highly connected network of cities – enhancing links with Liverpool, Leeds, Newcastle, Sheffield and Hull.

These investments are just the start.

The Government's Industrial Strategy¹ recognises that the key to securing sustainable growth in the UK is to realise the untapped potential within the North of England. It is time for a step change in investment in our cities, in our young people and skills, and in transport solutions that bring together the cities of the North.

Integrating HS2 and NPR stations at Manchester Piccadilly and Manchester Airport provides a major opportunity to secure significant growth and regeneration opportunities at these strategic locations, delivering many new homes and jobs, as well as new world-class transport facilities. When coupled with the delivery of a new skills strategy and improved transport connections to the stations, the benefits will reach every part of Greater Manchester, the North, and beyond into the rest of the UK.

Greater Manchester has the potential to be the best place to live, work and enjoy a great quality of life. We cannot stand still – we must seize opportunities from HS2 and NPR, multiply the benefits through targeted investment, and make sure they are felt throughout the conurbation and beyond.

This Growth Strategy sets out our proposals for local infrastructure investment to support HS2 and NPR at both Manchester Piccadilly and Manchester Airport, embedding them within our wider strategic plans, to ensure that people are well connected to the new job opportunities that these investments will offer, and delivering the right training and skills to empower the next generation to continue to make our city successful.

¹ Department for Business, Energy and Industrial Strategy (BEIS), 2017, Building our Industrial Strategy: Green Paper

By developing a highly integrated Growth Strategy that is deliverable through a reform-based funding solution, working closely with businesses, local communities, central Government and partners, there is no limit to what we can achieve.

This is our shared vision for growth across Greater Manchester.

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Chapter 1 – Introduction to Our Growth Strategy for HS2 and NPR

We believe that HS2 will transform the capacity and connectivity of Britain's rail network. It will not only provide new, fast travel options between our towns and cities and to Manchester Airport, but will also free up significant capacity on our existing rail networks, enabling more people and goods to be moved by rail. These benefits are multiplied further when combined with proposals for Northern Powerhouse Rail (NPR) and other committed investments in our rail networks.

In the 2015 Northern Transport Strategy², we set out a shared vision for HS2 and NPR services as critical and complementary components of a transformed future northern economy.

The National Infrastructure Commission (NIC) supported this vision in its 'High Speed North'³ publication, which highlighted the value to the northern region of very significant transport investment to reduce rail journey times, increase capacity and improve reliability between the North's principal cities.

The NIC stressed that improvements in transport connectivity across the North are necessary for building a Northern Powerhouse economy, but are not sufficient on their own. The improvements should form part of a broader strategy incorporating advancements in education, workforce training, research and innovation, spatial planning and wider infrastructure investment.

They also recommended that NPR proposals should be fully integrated with the delivery of other planned infrastructure. Transport for the North, the Department for Transport, Network Rail, HS2 Ltd and local stakeholders should therefore prepare a single integrated strategy by the end of 2017 which supports NPR aspirations. These recommendations were all accepted by Government.

This sets the context for our Growth Strategy for Manchester Piccadilly and Manchester Airport. It looks beyond HS2, to how we can maximise the benefits of classic rail investment, HS2, NPR, and local transport through a long-term, integrated strategy that coordinates local and central Government action and investment.

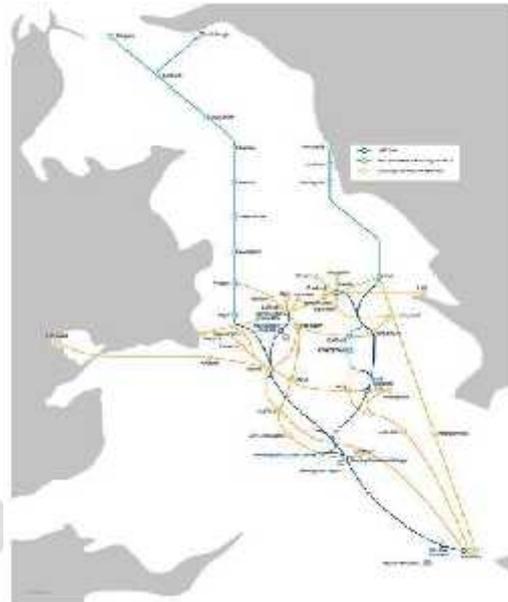
To capitalise on the opportunity, Greater Manchester is proposing a series of complementary investments to bring maximum benefits from high speed rail to residents, local businesses and to the wider economy. This includes enabling ambitious developments around the two new HS2 stations at Manchester Piccadilly and Manchester Airport, and wider connectivity investment to spread the benefits throughout the conurbation and beyond.

² Department for Transport, 2015, The Northern Powerhouse: One Agenda, One Economy, One North

³ National Infrastructure Commission, 2016, High Speed North

High Speed 2 (HS2) – a new high speed railway that will link London Euston with other major cities in England. Phase 1, due in 2026, will bring high speed services from London to Birmingham (with many then continuing from the West Midlands to provide journey time savings to other cities across the North). Phase 2, to follow a few years later, will expand the high speed network to reach Manchester and Leeds in 2033, completing a full Y-shaped network.

HS2 is vital to increasing the capacity and connectivity of Britain’s rail network. Not only will it provide new high speed services on the HS2 network, but will free up capacity on the existing rail network.



Northern Powerhouse Rail (NPR) – Sometimes referred to as ‘HS3’ or ‘Crossrail for the North’ - an ambitious plan to deliver upgraded railway lines between major northern cities designed to radically improve capacity, journey times and service frequencies. This will enable the region to function as a single economy to support a step change in the North’s economic growth. This investment will build on and extend the connectivity and productivity benefits of HS2 to more of the North’s towns and cities, radically increasing employment opportunities by improving business to business connectivity and significantly improving people’s access to jobs across the North.

A long-term, locally-led Growth Strategy...

Greater Manchester is particularly well-placed to capitalise on the economic opportunity presented by HS2 and NPR, as we have been developing a series of long-term strategic plans setting out our ambitions for sustainable and inclusive growth in the coming decades. These include:

- J **Refreshed Greater Manchester Strategy (GMS)** – a new integrated plan to drive long-term sustainable economic growth across the whole of Greater Manchester and to reform the way that public services are delivered, in order to help achieve the ambition to make Greater Manchester one of the best places in the world to live;
- J **Draft Greater Manchester Spatial Framework⁴ (GMSF)** – identifying the 20-year supply of land needed to deliver at least 200,000 new jobs and over 227,000 new homes, with the city centre, Carrington, The Quays and the Airport identified as key locations for this growth;
- J **Greater Manchester’s 2040 Transport Strategy⁵ (GM2040)** – our long-term plan for a world-class integrated transport system to support Greater Manchester’s wider ambitions; and

⁴ GMCA, 2016, Draft Greater Manchester Spatial Framework

⁵ Transport for Greater Manchester, 2017, Greater Manchester Transport Strategy 2040

-) **Manchester City Centre Strategic Plan**, which sets out the activity which will ensure the city centre consolidates its role as a major economic asset for Greater Manchester.

These strategic plans are underpinned by robust and well-developed governance arrangements, through the Greater Manchester Combined Authority (GMCA) and the Office of the Mayor, which can support our growth ambitions contained within the strategies.

....and an ability to deliver

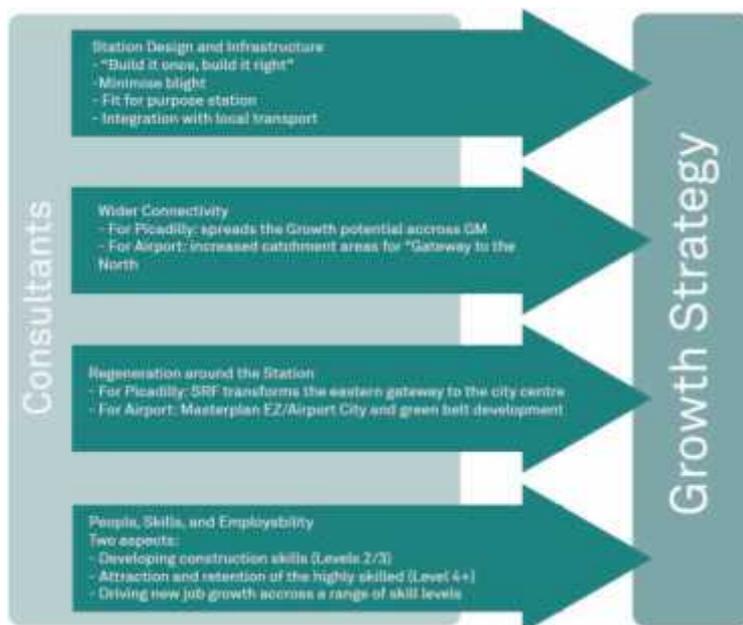
Greater Manchester's ability to prepare integrated, long-term strategic plans has enabled us to deliver more effectively, by building strong consensus over delivery priorities and investment plans. We have a hard-earned reputation for delivering prioritised and carefully co-ordinated investment to maximise local and national growth. We have led the way in terms of devolution, being the first region to agree a Mayor-led Devolution Agreement and the first city region to form a Combined Authority.

In 2009, we were also the first city outside of London to agree with Government a multi-year, devolved transport funding deal – the Greater Manchester Transport Fund. This together with investment through our local growth deal and other funding sources, has seen delivery of more than £3bn investment in the Greater Manchester transport network. The Metrolink network has doubled in size and we have invested in major bus priority improvements, such as the Leigh-Salford-Manchester guided busway, and new state-of-the-art town centre interchanges. Investments have also been made in cycle infrastructure and highways improvements including a new relief road to Manchester Airport (A6MARR).

How has the Growth Strategy been prepared?

In line with the recommendations of the NIC report, we have developed our Growth Strategy for Manchester Airport and Manchester Piccadilly around four “pillars” which provide a framework for understanding how the economic growth potential of both HS2 and NPR can be harnessed. These are:

-) Regeneration around the stations;
-) Station design and infrastructure requirements;
-) Wider connectivity to ensure that the benefits are shared beyond the immediate station vicinity; and
-) People, skills and employability.



The remainder of this document takes the framework provided by the four pillars, and demonstrates how we plan to put them into practice to the benefit of the areas around the stations and the whole of Greater Manchester.

Chapter 2 – A Growth Strategy for Greater Manchester

Addressing the North-South Productivity Gap

Over recent years, there has been growing recognition of the potential for the North of England to play a much greater role in delivering a stronger and more balanced national economy. Years of underinvestment in infrastructure and skills across the North has led to a significant gap in economic performance. As stated in The Northern Powerhouse Independent Economic Review (NPIER)⁶, the North's GVA per capita has consistently been about 25% below the average for the rest of England. This gap has been widening since the 2008/09 recession, which is an indication of lower levels of productivity in the North.

In the recent Industrial Strategy green paper, the Government acknowledged that for too long, the country's economic growth has been too concentrated in London. For the UK to reach its full potential, we need all of our cities and regions to perform at the highest level, particularly as the country moves to reshape its economy in preparation to leave the European Union.

Investment in new high speed rail services to improve connectivity between UK towns, cities and major ports and airports will help to narrow this productivity gap, allowing greater clustering of economic activities, and more rapid exchange of ideas, services and goods between our major centres.

The NPIER identified a series of distinctive economic strengths of the North which, if fully exploited through a holistic strategy and targeted investment, could help the region achieve its full potential. The strengths focused on the four "prime" capabilities

⁶ Transport for the North, 2016, The Northern Powerhouse Independent Economic Review

of advanced manufacturing, health innovation, energy and digital; and three “enabling” capabilities of financial and professional services, education and logistics. Together, these capabilities already account for some 50% of Greater Manchester’s economy and almost 20% of the city region’s jobs.

The NPIER set out a vision of a “transformational” economic future for the North which could deliver a 15% increase in GVA, a 4% increase in productivity and 850,000 more jobs by 2050. To deliver this scale of growth, however, significant investment would need to be made in skills, innovation and transport connectivity.

Greater Manchester is particularly well placed to exploit the opportunities identified in the NPIER. It is home to the North’s key international gateway, Manchester Airport, and has very significant clusters of both prime and enabling capabilities, particularly at the core of the conurbation.

Hence, investment in HS2 and NPR, serving Manchester Airport and Manchester City Centre, and supported by the wider transport investment package set out in our Growth Strategy, will not just benefit the local economy, but will also act as a catalyst for delivering the long-term growth ambitions of the North of England and the UK.

The step change in connectivity that will be delivered by both HS2 and NPR is essential for supporting the ambition for an increasingly successful Northern Powerhouse economy, with Greater Manchester at its heart. These major transport investments will support a doubling of the economic output of Greater Manchester to c. £132bn by 2050.

New employment opportunities for Greater Manchester residents

High value growth sectors are vital to our future success and Greater Manchester is well-placed to maximise the benefits of these sectors through the delivery of high speed rail investment.

High speed rail will provide significant job opportunities, both during the construction phase and the operational phase. Additional long term employment opportunities will come from increased development and investment brought to the city and the city region. There is also significant potential to export acquired skills across the world. Aligning the skills of the Greater Manchester population to the jobs created across the region is the fundamental objective of the skills strategy.

Major engineering aspects, including the single longest element of Phase 2 tunnelling, will take place in and around the city region. This will present significant opportunities for the local business community and a major boost to local training initiatives. Greater Manchester has expertise in a number of sectors relevant to the construction and operation of major transport infrastructure, including:

-) Construction: 10,425 firms employing 52,600 people;
-) Architectural and engineering: 4,075 firms employing 19,500 people;
-) Legal and accounting: 3,640 firms employing 40,200 people;
-) Management consultancy: 5,435 firms employing 33,100 people.

HS2 and NPR will be of major benefit to the areas around both Piccadilly and Airport stations and Manchester as a city. Our Growth Strategy is designed to fully extend these benefits across Greater Manchester.

Piccadilly, at the heart of Manchester City Centre, has been identified as a major commercial growth location, with the potential to become a key business location for growth sector industries, with associated opportunities for expanding residential development.

The area around Manchester Airport, including Airport City, which sits within the Greater Manchester Enterprise Zone, is also identified for significant development growth in terms of commercial offices, global logistics, advanced manufacturing, hotels and complementary residential development.

The arrival of new high speed rail services at these two key strategic locations will act as a major catalyst for growth, delivering new jobs, new places for business, and new homes. Our Growth Strategy is designed to fully maximise and extend these benefits across Greater Manchester.

The Greater Manchester Local Enterprise Partnership (LEP), along with the other four North West LEPs have jointly developed a [High Speed Rail Skills Strategy and Implementation Plan](#)⁷ to identify the key strategic priorities in relation to High Speed rail and pathways to the jobs that will be created.

Building on this, we have developed a Greater Manchester focused skills strategy that translates the five priorities set out in the North West High Speed Rail Strategy and Action Plan into a Greater Manchester context with regard for both HS2 and NPR, focused on interventions around the following themes:

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- 1. STEM (Science, Technology, Engineering and Mathematics)** Creation of a Greater Manchester STEM Framework, with governance arrangements to allow the public, education and private sectors to work together to drive STEM engagement.

 - 2. Careers Guidance** Delivery of an enhanced Greater Manchester Careers Service and Strategy, working with the rail industry to promote training and career opportunities.

 - 3. The Skilled Workforce** The development of Vocational Centres of Excellence providing technical training which reflects the needs of the rail engineering and construction industries. Creation of a Greater Manchester Institute of Technology will provide courses specialising in industrial digitisation and applications relevant to the major infrastructure and technical services companies. We will work with the four Universities within Greater Manchester to provide STEM skills through higher apprenticeship, graduate and post graduate qualifications in close partnership with industry.
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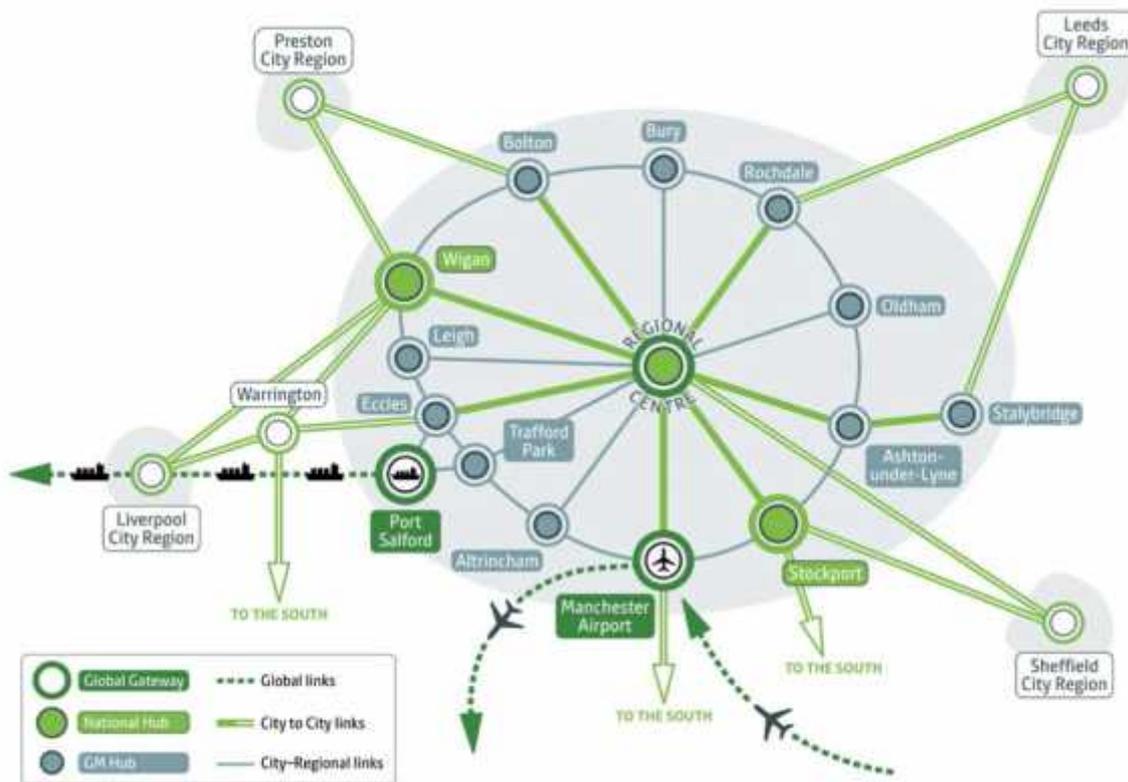
⁷ New Economy Manchester, 2016, North West High Speed Rail Skills Strategy & Implementation Plan

4. Apprenticeships A shared apprenticeship scheme will be created, including advanced and higher level apprenticeships, to provide sustainable career paths for apprentices. Establishment of a Greater Manchester Apprenticeship Hub will maximise employer take up in key sectors, provide guidance for young people and ensure supply and demand are in balance.

5. Local employment and social value The Greater Manchester Combined Authority will champion local employment in HS2 related activities through social value clauses, contractor commitments, funding initiatives and procurement framework opportunities.

Wider transport connectivity as a stimulus to growth

Our Greater Manchester Transport Strategy 2040 sets out an ambitious vision to deliver “world class connections that support long-term sustainable economic growth and access to opportunity for all”. The key focus is on developing a considerably more integrated transport system, which provides attractive and customer-focused alternatives to private car use. A series of well-integrated and well-served public transport interchanges at key locations across the city region will improve access to jobs, health facilities, leisure and recreation amenities, and other opportunities.



Within the context of the 2040 Strategy, our Growth Strategy is designed to maximise the benefits of the new high speed rail services to Greater Manchester by ensuring full integration with the existing and future transport network.

The Growth Strategy will increase the role of Manchester Piccadilly as an important national transport hub and as a major commercial site at the heart of the city centre. It has the potential to become a key professional and financial services business location, with opportunities for expanding residential development.

Manchester Airport will become an integrated and highly connected transport hub for Greater Manchester, acting as a global gateway to the North. The area around Manchester Airport, including Airport City, which sits within the Greater Manchester Enterprise Zone, has also been identified for significant development growth in terms of offices, global logistics, advanced manufacturing, complementary hospitality and commercial and residential development.

The real opportunity is to multiply the benefits provided at both stations by making strategic investments in infrastructure and skills to ensure that the impacts radiate to the entire Greater Manchester conurbation and beyond.

We are exploring a range of very significant changes to the way that transport is provided in Greater Manchester, to support our aspirations for a more integrated system. The Bus Services Act has given us new powers to develop proposals to reform bus services to provide a modern, low-emission, accessible and affordable bus system which is fully integrated with the wider transport network. Complementary to this will be improvements to the environment for walking and cycling and proposals to secure more local rail stations.

We have also set out a bold vision for the future of rapid transit (covering our Metrolink network, higher frequency commuter rail services and busways). This includes:

-) providing additional city centre capacity to tackle future bottlenecks on our network;
-) converting poorly performing suburban rail lines to allow tram-like vehicles to use them to increase frequencies and improve access to the regional centre;
-) increasing capacity on remaining suburban heavy rail services into the regional centre; and
-) building new sections of bus or rail-based rapid transit where there is sufficient demand – particularly linking to major hubs at the regional centre and Manchester Airport.

Through this Growth Strategy, we have developed more specific proposals for how rapid transit can help to extend the benefits of HS2 and NPR across Greater Manchester. The rest of this document sets out our ambitions for the Manchester Piccadilly and Manchester Airport areas, in order to maximise the growth potential of HS2 and NPR, and our plans to spread the benefits from this growth throughout Greater Manchester through the investment we have outlined above.

Section 3 – Manchester Piccadilly

The Growth Potential at Manchester Piccadilly

Manchester Piccadilly represents one of the biggest, commercially-led, development opportunities in the UK, and has the potential to make a significant impact on the national economy.

As we set out in our Greater Manchester Transport Strategy 2040 and the draft Greater Manchester Spatial Framework, growth in Manchester City Centre is set to be significant:

-) 54,000 people currently live in Manchester City Centre (2017) and there could be 50,000 more homes by 2040
-) 140,000 people work in Manchester City Centre, and there is potential for up to 110,000 more jobs by 2040.

The introduction of HS2 and NPR services, combined with the investment, will make Manchester Piccadilly one of the best connected and thus most productive locations in the North of England.

A fully integrated station, along with our wider development, infrastructure and public realm proposals, can act as a magnet for development, attracting new businesses in key sectors and providing significant job opportunities for Greater Manchester residents.

With the proposed new investment, we expect to create around 40,000 new sustainable and productive jobs, 13,000 new homes, and 820,000m² of new commercial development in the area surrounding Piccadilly, with further benefits occurring beyond the immediate surroundings.

The area will be attractive to key growth sector industries and will benefit from the close proximity to digital and creative clusters in the Northern Quarter and other areas of the city centre, and higher education, research and health innovation capabilities in the Oxford Road Corridor.

Our Vision: A new Commercial District

The arrival of HS2 and NPR at Piccadilly Station represent a once-in-a-century opportunity to transform the eastern side of the city centre and create a world-class transport hub at its heart.

Piccadilly lies adjacent to Manchester's commercial centre. Through our carefully developed proposals, Piccadilly will prosper through the expansion of the commercial core and new residential developments, supported by new public spaces, linkages and leisure amenities.

The bold vision that was envisaged through the 2014 Strategic Regeneration Framework⁸ (SRF) for the Piccadilly area has been refined to both enhance its potential and incorporate updated rail infrastructure proposals.

Building on the original SRF, this Growth Strategy consolidates the distinctive sense of place for the 21st century and beyond with mixed-use 'neighbourhoods of choice' gathered around new streets, squares and parks. Improved connectivity is embedded in the plans so that the regeneration benefit is felt well beyond the boundaries of the SRF.

The Piccadilly area will become a truly sustainable new district for our city. Our SRF has already proposed new public spaces and linkages, including a new boulevard connecting Piccadilly to the eastern part of the city, and a major new public park.

We have identified a number of new neighbourhoods within the Manchester Piccadilly SRF area, with strong individual identities that represent major opportunities for regeneration. The SRF proposes a commercially-led district, with large office developments around public squares, particularly at Piccadilly Central, which will provide a prime business address alongside the boulevard, adjacent to the new integrated station. This neighbourhood will be crucial in driving the growth and job opportunities envisaged for the area. Mayfield will become a new commercially-led mixed-use neighbourhood on the banks of the River Medlock, while North Campus (the former University of Manchester Institute of Science and Technology campus) will provide a mix of development, which can drive further growth in commercial, advanced manufacturing and higher education related activity, complementary to the strengths of the Oxford Road Corridor. Areas further away from the station provide opportunities for residential development, particularly around the canal basin, and new public realm.

We will ensure that the benefits of regeneration at Piccadilly are extended to adjacent areas and beyond, particularly those to the south and east of the city centre. At Mayfield, for example, which is the first phase of development under the Piccadilly SRF, plans are already in place for a new development across 20 acres of land, which will provide an opportunity to create a new mixed-use community in a central location. The Strategic Regeneration Framework for Mayfield seeks to deliver up to 6,500 new office-based jobs; 1,330 new homes; a high-quality new public realm including a large city park; with additional regeneration benefits spilling over into the neighbouring areas such as Ardwick Green and the Lower Medlock Valley. These plans are now moving forward at pace following the formation of a joint venture in 2016 between landowners (Manchester City Council, TfGM and London & Continental Railways) and a development partner (U+I).

A New Integrated Station

Manchester City Council and TfGM have worked with their advisors to create station proposals where the quality of inter-modal integration and architecture are of the very highest order. The integrated transport hub will bring together HS2 and NPR with other national and suburban rail services, Metrolink and local bus services.

⁸ Manchester City Council, 2014, Mayfield Strategic Regeneration Framework

The integrated station will be fit for the long term and explicitly designed to maximise productivity and connectivity, which means recognising its role as the gateway to the immediate Piccadilly SRF area, the regional centre, and the wider city region.

The station design has evolved to incorporate updated and emerging requirements from HS2 and NPR. Further work is needed with HS2 on the treatment of the station entrance onto London Road. Our proposal is to create an inspiring and functioning station arrangement that:

-) is fit to accommodate the significant anticipated growth in passenger numbers that are expected from commercial, residential and associated development;
-) ensures it transforms the whole experience of arriving into the city, becoming a prominent part of the landscape with a major new public space forming this key threshold;
-) connects the integrated Piccadilly station much more clearly, directly and accessibly to adjacent development and the wider city centre; and
-) provides a fully integrated station with connected concourses and legible access across all the modes of transport.

This design would keep the HS2 elements of the station within the same boundary proposed by HS2 Ltd but arriving much more directly into the city centre and connecting much more seamlessly with surrounding areas.

Co-ordinating Delivery

The arrival of HS2 and NPR in Manchester city centre will be the economic catalyst for turning Piccadilly into the kind of landmark that HS1 has made London St Pancras.

There is a real opportunity to accelerate some of these additional benefits, by sequencing the station infrastructure improvements and enhancements at Piccadilly, and driving market confidence so investors can realise some of the full benefits of HS2 Phase 2 before services arrive in 2033.

It is essential that delivery of an HS2 station is well co-ordinated and makes early provision for NPR requirements, through creating the right “touchpoints” with HS2. This will enable Greater Manchester to realise the full, long-term development potential in the Piccadilly area, and maximise the economic benefits for the conurbation. Potential investments in Metrolink will also need to be carefully aligned with the planning and delivery of HS2, NPR and the Northern Hub.

A focus on local access into and out of the station by all transport modes is also critical. Local transport networks should have the capacity and quality to handle the very high flows of passengers using the station, as well as the significant increase in population arising from the step change in development growth in the SRF area.

We will also need to plan very carefully the construction timetables of the proposed schemes. Delivering all of the improvements together (HS2, NPR, Metrolink and the Northern Hub) would reduce the overall construction timescales of the individual elements of the scheme, minimise disruption and would reduce the overall costs of the project. With HS2 timescales for development extending over 10 years alone, this

approach will increase investor confidence, avoid an extended period of blight, and encourage development of the area. A “build it once, build it right” approach is critical to ensuring we can achieve our objectives of reducing blight and maximising opportunities for growth.

These investments cannot wait until the full arrival of HS2 in 2033, and there are benefits to be gained by coordinating works to deliver investment in and around the station by the time HS2 Phase 1 opens in the mid-2020s. Manchester will already be benefiting from reduced journey times from HS2 Phase 1, since trains between London and Manchester will be using new high-speed infrastructure between London and the West Midlands.

In order to achieve Greater Manchester’s ambition of a fully integrated station the route of HS2 into Manchester Piccadilly must be aligned so that it can fully deliver the integration of HS2 and NPR, and consequently integration of classic rail and Metrolink. Critically, the alignment plans need to allow for further work to conclude on an integrated HS2/NPR station at Piccadilly that can both accommodate the NPR network vision set out in the Northern Transport Strategy, providing for at least eight NPR services per hour, and minimise its impact on the regeneration and growth potential around the station in Manchester City Centre. At present, pending the outcome of the further analysis, it is the view of Greater Manchester that this is best served by a tunnelled NPR station at Piccadilly.

This not only provides a fully integrated station but does not impact on the available development land outside of the station. Alternative options, such as situating an NPR station next to the HS2 station, would significantly reduce the amount of developable land and create a major barrier to routes and access within and around Piccadilly. This in turn would impact upon commercial and residential opportunities within the Piccadilly Central area, and the resulting growth and jobs benefits.

In order to develop an acceptable and deliverable solution that minimises blight, it will be crucial to collaborate effectively with Government, HS2 Ltd, TfN and partners. As the design progresses, communication will be vital to better understand the construction methods, the approach to acquiring land, and the timetable for development of the core HS2 and NPR build programmes.

Improved Transport Links

We will deliver an integrated strategy that spreads the benefits of growth at Manchester Piccadilly across the wider conurbation and the North, to support our continuing ambition to increase Manchester’s profile as a regional hub and a global city.

Investment in our heavy and light rail networks will support long-term growth across the conurbation by addressing capacity constraints across the network. Growth will also be supported by building on the significant investment through projects such as the Metrolink Second City Crossing and the Ordsall Chord, which will directly link Piccadilly and Victoria for the first time.

As part of our plan to increase access to Piccadilly from elsewhere in the city, we will seek to deliver the following infrastructure enhancements:

-) Short to medium term investment in new capacity on existing Metrolink and heavy rail services into the city centre;
-) Expanded Metrolink capacity in the city centre following the arrival of high speed services, potentially through tunnelled metro services and suburban rail enhancements to complement NPR (subject to further feasibility assessment).
-) Improved public transport connectivity to Piccadilly station, including cross-city bus services from the North, West and South of Greater Manchester (including more direct access from the University area), routed via the station;
-) Potential relocation of long distance coach services to Piccadilly, providing a more direct route to the motorway network;
-) Provision of efficient car access to the station and its car parks without causing additional congestion elsewhere on the city centre network; and
-) Enhanced walking and cycling routes to and from the station and Piccadilly area. In particular, we will need to accommodate significant increases in pedestrian flows into, within and around the Piccadilly area and create a much more legible environment for visitors arriving at the station and finding their way to other destinations across the city centre, through improved wayfinding and more direct pedestrian and cycle routes.

The enhancements to higher skills training proposed in our HS2 Skills Strategy through, the provision of Centres of Excellence and apprenticeship schemes, will help to equip Greater Manchester residents in the skills required for the jobs in key industries expected to locate in the regenerated Piccadilly area, such as financial and professional services, digital/technology and science-based industries.

Section 4 - Manchester Airport

Manchester Airport as the North's International Gateway

Manchester Airport is already the UK's principal international gateway outside of London and provides access to a range of international destinations with over 70 airlines operating to around 210 destinations worldwide. It also plays an important freight role, with a particular specialism in handling high value and time sensitive cargo.

Its role in providing access to international markets means that the airport is central to the delivery of a successful Northern Powerhouse economy. Over 300 businesses are based on the airport site, and there are 22,200 direct on-site jobs and a further 45,000 jobs in the wider economy that rely on the airport. The economic value of the airport is estimated to be £950m each year.

New high speed rail services to Manchester Airport will significantly increase the airport's catchment area, bringing more people and businesses within an attractive rail journey time of the airport. This will, in turn, increase the airport's ability to attract new inter-continental routes to Manchester Airport and further increase the north of England's ability to trade internationally and to develop new global leisure markets.

Given the critical capacity constraints at airports in the South East, the UK should seek to exploit the significant capacity already available at Manchester Airport. Manchester Airports Group (MAG) has made a significant commitment to growing the airport and has ambitious plans to grow passenger numbers from 26.2 million in 2016-17 to up to 45 million each year, with capacity for 55 million which can be achieved without the need to build a new runway.

The airport development is underway with a £1bn plus transformation programme to ensure that it can offer the levels of customer experience, operational effectiveness and cost-competitiveness demanded by passengers and airlines. At the heart of this project is the expansion and reconfiguration of Terminal 2 to become the principal passenger terminal; the closure and demolition of Terminal 1 and the expansion of Terminal 3. This work will be undertaken in phases, over a period of ten years, with the first phase scheduled to open from 2019. This forms part of the airport's Sustainable Development Plan⁹, published in 2016.

HS2 and NPR services will play an important role in supporting improved global connectivity from across the UK by transforming levels of connectivity to the airport. The proposals set out in the rest of this chapter describe how we will maximise these benefits through our Growth Strategy.

Exploiting the Growth Opportunities at Manchester Airport

The plans we have developed as part of our Growth Strategy seek to address the need for a long-term, coordinated view that maximises the development potential of the area around the airport.

⁹ Manchester Airports Group, 2016, Manchester Airport Sustainable Development Plan 2016

This includes the development of station proposals for HS2 and NPR at the airport that take account of how Manchester Airport, the Greater Manchester Enterprise Zone (EZ), Airport City, and sites identified within the wider airport area can be fully integrated to drive regeneration, productivity and growth.

A commitment to an integrated HS2/NPR/Metrolink station at the airport will strengthen the location in the minds of businesses seeking to grow and locate within Greater Manchester. It will also help unlock other infrastructure investment that can help support residential growth to the north west of the proposed station.

There are particular opportunities to attract further globally mobile businesses that rely on first-rate international and domestic connectivity. Together with the growth in the airport itself, 20,000 new jobs are forecast to be created in and around the airport over the next 10 years. This provides a firm foundation to support further business and employment growth in the area through investment in HS2, NPR and the Growth Strategy.

Building on the success of the existing Airport City and the wider Greater Manchester Enterprise Zone (EZ)

The vision for the Greater Manchester EZ is of an area driven by the economic activity generated by the airport, Airport City and MediPark (a 500,000 sqft development of offices, laboratories and manufacturing plants in Wythenshawe, being created by the University Hospital of South Manchester, to attract major life science and health innovation companies).

These initiatives are also complemented by a series of sites in south Manchester and Trafford. The EZ focuses on development opportunities to accommodate businesses that will benefit from the high level of connectivity provided by proximity to an international airport, including European Regional Head Quarter Offices, office logistics, advanced manufacturing, and supporting retail, leisure, hotel and conferencing facilities.

Lying at the heart of Airport City are two of the seven EZ sites which are located to the north and south of Manchester Airport – Airport City North (a new business district) and Airport City South (a Global Logistics Hub). Together these two sites form a globally-focused development opportunity driven forward by an £800m joint venture arrangements between Manchester Airports Group, Carillion, Greater Manchester Pensions Fund and the Beijing Construction Engineering Group.

The commitment to deliver HS2 will ensure it can both accelerate the delivery of existing EZ sites in advance of completion of the station, while supporting the expansion of further sites in the immediate environs of the airport.

Emerging Growth Strategy Proposals for the Manchester Airport Area

Around the station, a brand new suburban centre has been envisioned that attempts to create a strong sense of place, balance regeneration aspirations, and respect the natural setting. A new neighbourhood of distinction and diverse character will contain homes, offices and hotels. The station square is a focal point to the development with massing and uses intensified to create a vibrant heart. New residential communities

of appropriate diversity and quantum are balanced with high proportions of natural amenity space, integrated with existing neighbourhoods. Our proposals create a bold new place of distinction and a high quality transport hub serving both the locality and the whole of Northern England.

Work has begun to identify the locations for new economic activity; the type, value and scale of development; and critically, the likely phasing and programme to realise these opportunities.

Strengthening the Airport through improved connectivity

The arrival of HS2 and NPR, with proposed significant expansion of Metrolink, will further consolidate the status of Manchester Airport as the North's principal international gateway. To fully capitalise on the economic opportunity offered by a new airport station, it must be fully and carefully integrated into the wider economic and transport plans for the area around the airport.

An Integrated Station

Provision of an integrated station with seamless connections between domestic and international travel is critical in supporting and growing the global connectivity provided by the airport, and the productivity gains this generates for businesses within the airport's catchment.

Our vision for the station integrates all transport modes and in particular creates a unified experience for the connection between rail and air via Metrolink. Architecturally, boldness of vision and an uplifting sense of space are combined with ease-of-use and a highly legible environment for the benefit of all users. The station at the airport is proposed to be a fully integrated station, which can maximise growth in the surrounding areas.

The station location and alignment detailed within the November 2016 HS2 route announcement is generally acceptable to Greater Manchester. However, the overall station proposal could be improved through appropriate transport connections, including ensuring the highway connections to it are robust and do not inhibit the growth of the airport and the wider south Manchester / Trafford economy. Alternative solutions that create a fully integrated station have been prepared by GM partners.

A preferred station layout and wider plan are proposed that provides a convenient interchange between HS2, NPR and Metrolink. This identifies suggested highway improvements and potential areas for development.

With some design enhancements, which we intend to explore through joint working, the existing HS2 station proposal is well-placed to serve and benefit from the emerging strategy for the airport area. However, it will be important to ensure that development and regeneration of the area around the station is coordinated with HS2, NPR and Metrolink related construction activities.

This requires a coordinated, long term approach that avoids duplicated or extra work while taking advantage of possible synergies, taking into account:

-) Construction activity related to the station, HS2 tunnel to Manchester Piccadilly and vent shafts.
-) Local transport improvements, e.g. Metrolink and highways works.
-) Progress of prospective major development proposals in the surrounding area; and
-) The importance of maintaining and improving the connectivity of the airport for passengers and workers.

The construction plans for HS2, particularly those associated with the construction of the tunnel, will determine which areas of land may be required, and over what period, and the scale and nature of the road infrastructure necessary to support such major construction activity.

Therefore, as part of the Growth Strategy, it is essential that Greater Manchester and its partners work with HS2 Ltd and DfT to assess and agree the optimum solutions and develop a timeline for co-ordinating construction and development activity on and around the airport sites, also taking into account the impact the emerging NPR proposals may have on the scale and timing of construction activities.

These designs are still being developed. The main points being addressed include:

-) Review of potential highway access schemes involving Highways England, TfGM and local authorities to assess the necessary infrastructure for the airport station, including links to the surrounding development areas. A coherent planning, design and development programme will be needed to integrate road access proposals for the HS2 station and the car parks serving the station.
-) Prospective development of multi-modal access to the airport (including the Western Loop Metrolink extension).
-) Providing sufficient space for the movement and circulation of people around the station.
-) Providing clear and convenient routes within the station for interchanging passengers.
-) Eliminating barriers to movement between the station and the airport, the Airport City Enterprise Zone and beyond.
-) Ensuring that all access modes (tram, taxi, bus etc.) have sufficient capacity within the new layout to handle the demands likely to be made of them.
-) Ensuring that accommodating further growth in all types of rail travel can be accommodated by suitable passive provisions, thereby future-proofing the design.
-) Review of the car parking requirements, to determine the optimum number of parking spaces needed to accommodate both H2 and NPR requirements

Improved Transport Links

We have identified a series of measures for providing the best possible access to, and onward travel from, the station and integrating public transport modes to minimise barriers to interchange within the station area. All of these proposals will need further design and feasibility assessment work to ensure that they fully support our growth ambitions at the airport.

Our initial proposals for improving access to the airport by sustainable transport modes include:

-) Investment in good quality cycling infrastructure, improving access to airport jobs for local residents.
-) A busway (and parallel cycleway) is proposed to provide a rapid bus service via the HS2 station from the airport to Altrincham,
-) Bus Services will benefit from proposed bus priority on roads that will be relieved by the east-facing A6 to Manchester Airport Relief Route (A6MARR), which is under construction.
-) Improved east-west public transport connections via Metrolink;
-) The National Rail network provides the main public transport connections from the Manchester Airport area across the city-region, via the public transport hub at Piccadilly. Rail services to Piccadilly are fast and frequent. However, platform lengthening will be required at the airport station to accommodate the longer trains that will be needed to support rail travel demand growth throughout Greater Manchester.

Road access will remain very important to the Manchester Airport area, and we have also developed a proposed package of highways improvements for further assessment:

-) Increased capacity on the connection from the HS2 station to the M56.
-) A new road link from the HS2 station to the A6 to Manchester Airport Relief Route (A6MARR).
-) Capacity enhancements at M56 Junctions 5 and 6, which provide motorway access to Manchester Airport, the HS2 station and, surrounding developments.
-) A new link to the University Hospital of South Manchester that will connect development within the Airport Gateway and other major trip attractors with the M56 via the HS2 station.
-) Increased capacity at the junction of Styal Road and Finney Lane to improve access to the airport area from the east.

We will also need to carefully manage the impact of having additional car parking at the airport station, and the enhanced public transport connections to Manchester Piccadilly, to ensure that this does not lead to unnecessary impacts on the local road network.

Section 7 – delivering our Growth Strategy

Once achieved, our ambitions will completely transform areas of Greater Manchester, and will enable the city to lead the realisation of the ambitions of HS2 and NPR.

With an appropriate funding deal in place to facilitate targeted investment, we will be able to embrace the economic opportunities that the new rail access will deliver, and will lead the work to ensure that opportunity is spread to all parts of the conurbation, and into the wider north of England.

Building on the success of our existing Greater Manchester Transport Fund, we have the basis for appropriate structures to lead the realisation of these plans going forward. Some of our ambitions can be delivered through local initiatives, through existing structures and plans already in place, while others will benefit from increased collaboration with other sections of Government.

We are working collaboratively with Government to develop a funding structure that will enable investment in the transport and regeneration schemes that form part of our Growth Strategy programme.

As indicated in the March Budget, we are in discussions with the Government about a broader transport funding arrangement for Greater Manchester. This will be fundamental to the delivery of the housing and employment growth identified in the Greater Manchester Spatial Framework, longer-term inclusive growth objectives, and the broader Northern Powerhouse agenda. Moreover, without this, as our Strategy shows, we will not be able to realise the full potential of HS2 and NPR for the Greater Manchester economy.

We anticipate that this new arrangement will involve material local funding contributions, and that these will only be possible under a programme of wider reforms to the fiscal regime in Greater Manchester. Significant further work is required here to ensure a funding strategy that is sustainable, equitable and that fits with both local and central policy.

Through the Office of the Mayor, Greater Manchester Combined Authority, TfGM, Manchester City Council, Trafford Council and Manchester Airports Group, we will:

-) deliver excellent connected local transport infrastructure around Piccadilly and Manchester Airport;
-) develop a long-term plan to maximise the potential of a connected system;
-) deliver our Greater Manchester Growth Strategy;
-) build a redeveloped city centre area for commerce and recreation, including the major redevelopment of the Piccadilly area set out in our SRF;
-) build a brand new suburban centre in the airport area with a strong sense of place, balancing the regeneration aspirations with a respect for its natural setting; and

-) promote and further enhance Manchester as a destination of choice for inward investment and development, with the aim of increasing Manchester's profile as a global commercial hub at the heart of the Northern Powerhouse.

Through Transport for the North, we will:

-) deliver a programme for Northern Powerhouse Rail that opens up the north of England and creates an engine for economic growth to rival London.

We will work with HS2 Ltd to:

-) coordinate the delivery of HS2 with NPR to help integrate and plan both projects to deliver the optimal benefits for Greater Manchester, maximise the benefits for the wider north of England, and reduce any costs of duplication;
-) welcome classic-compatible services to Manchester in 2026;
-) support the Phase 2b Hybrid Bill's passage through Parliament to lay the legislative framework for delivery of HS2 to Manchester; and
-) deliver the right station solutions.

We will work collaboratively with central Government to:

-) secure support for the Strategy's regeneration and skills agendas, ensuring GM as a whole benefits from the growth created through the strategy;
-) develop a funding structure to enable us to invest in the regeneration of the station areas; and
-) secure a commitment to enabling the comprehensive regeneration of the Piccadilly and airport areas in order to provide assurances and facilitate forward planning.