TOPIC PAPER

JANUARY 2019

HOUSING

WITH APPENDICES

1 Introduction

1.1 To help explain the GM Spatial Framework (GMSF), a series of Topic Papers has been prepared. This is to explain the reasons for the policies in the draft GMSF.

1.2 Each Topic Paper summarises and cross-references the relevant evidence and explains how this has informed the draft GMSF. Each Topic Paper summarises the previous consultation comments that are relevant to the topic. The Topic Papers explain how the draft GMSF policies and allocations have been derived based on the evidence, consultation comments and Integrated Assessment.

1.3 The GM Combined Authority has chosen to prepare Topic Papers to be transparent in how the GMSF has been prepared and to provide a more understandable summary of the background technical information.

What is the GMSF?

1.4 The GMSF is a joint plan of all ten local authorities in GM, providing a spatial interpretation of the Greater Manchester Strategy which will set out how Greater Manchester should develop over the next two decades up to the year 2037. It will:

- Identify the amount of new development that will come forward across the 10 districts, in terms of housing, offices, and industry and warehousing, and the main areas in which this will be focused.
- Ensure we have an appropriate supply of land to meet this need.
- Protect the important environmental assets across the conurbation.
- Allocate sites for employment and housing outside of the urban area.
- Support the delivery of key infrastructure, such as transport and utilities.
- Define a new Green Belt boundary for Greater Manchester.

2 Policy context

2.1 This section summarises the key pieces of national policy and legislation that has had an impact on the Revised Draft GMSF. Much of the policy requirements for local planning come from the Revised National Planning Policy Framework (NPPF)

National Planning Policy Framework

2.2 The National Planning Policy Framework (NPPF) provides the national policies for plan-making. It details key policies against which development plans will be assessed and with which they must comply. It requires plans to be justified and based on proportionate evidence, taking into account relevant market signal.

2.3 The NPPF was published in July 2018. Paragraph 11 of the NPPF sets a presumption in favour of sustainable development whereby local plans should meet objectively assessed development needs, with sufficient flexibility to respond to rapid change.

2.4 Paragraph 61 of the NPPF requires local authorities to plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community. This includes the recommendation that planning authorities should assess the size, type and tenure of housing needed for different groups in the community. Paragraph 31 of the NPPF states that each local planning authority should ensure the local plan uses a proportionate evidence base that is relevant and up-to-date. This should be adequate and focused tightly on supporting and justifying policies, and take into account relevant market signals. The GM Strategic Market Housing Assessment, published alongside the Draft GMSF, brings together relevant evidence to comply with this.

Planning Practice Guidance

2.5 Planning practice guidance (PPG) was issued by Government in March 2015 and updated in September 2018, and contains guidance on 'Housing need assessment'[(1)]. This provides advice on how key elements of the NPPF should be interpreted, including the approach to deriving an assessment of Local Housing Need.

Local Housing Need Methodology

2.6 On 14 September 2017 Government published a wide ranging consultation entitled "Planning for the right homes in the right places"[(2)]. This followed the publication of the Housing White Paper, Fixing our broken housing market in the spring of 2017[(3)] which included a proposed standardised national methodology for calculating housing need.

2.7 The consultation ran until 9 November 2017, and in March 2018 Government published their response to this consultation which concluded their Local Housing Need as the most appropriate method to assess need[(4)].

2.8 Government subsequently published the revised National Planning Policy Framework in July 2018, which however set out plans to "consider adjusting the [Local Housing Need] method after the household projections[(5)] are released in September 2018."[(6)] On 26 October 2018, Government released their consultation to update planning practice

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1 Available at: www.gov.uk/guidance/housing-and-economic-development-needs-assessments
2 See: www.gov.uk/government/speeches/local-housing-need
3 Available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/590464/Fixing_our_broken_housing_market_-_print_ready_version.pdf
4 Available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/system/uploads/attachment_data/file/685293/Government_response_to_Planning_for_the_right_homes_in_the_right_places_consultation.pdf
5 As of 23rd January 2017, responsibility for household projections transferred from the then Department of Communities and Local Government to the Office for National Statistics.
6 See: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/728498/180724_NPPF_Gov_response.pdf pp.25-26

guidance on housing need assessment (and the Local Housing Need methodology), taking account of the 2016-based household projections[7]. Paragraph 15 states that the standard method for assessing minimum housing need is a starting point for the planning process. Local planning authorities may decide that exceptional circumstances justify the use of an alternative method, but they will need to identify these reasons and can expect them to be tested by the Planning Inspectorate during the examination of their plans.

2.9 Paragraph 19 of the Government's October consultation proposes 3 changes in response to the new ONS household projections;

1. For the short term, to specify that the 2014-based data will provide the demographic baseline for assessment of local housing need.
2. To make clear in national planning practice guidance that lower numbers through the 2016-based projections do not qualify as an exceptional circumstance that justifies a departure from the standard methodology; and
3. In the longer term, to review the formula with a view to establishing a new method that meets the principles set out in that consultation.

2.10 While Brexit may alter future population and household trends, any attempt to adjust forward projections would have a high degree of uncertainty, even if Government had not introduced the standardised methodology.

2.11 Greater Manchester does not consider that exceptional circumstances exist to justify departure from the standard methodology and therefore the 2014-based household projections have been used as the starting point for the assessment of Local Housing Need.

Greater Manchester Housing for Vision and the Greater Manchester Housing Strategy

2.12 The Greater Manchester Vision for Housing[8] sets out our clear ambitions for tackling the housing crisis. The Vision provides a framework for our forthcoming Greater Manchester Housing Strategy and the final version of the Greater Manchester Spatial Framework. The vision focuses on key issues of existing homes; future homes; and delivering change. These are wrapped within the overarching need to connect housing, people and place.

7 Available at: www.gov.uk/government/consultations/changes-to-planning-policy-and-guidance-including-the-standard-method-for-assessing-local-housing-need
8 www.greatermanchester-ca.gov.uk/what-we-do/housing/greater-manchester-housing-vision/

3 Summary of evidence

Greater Manchester Strategic Housing Market Assessment

3.1 The GM Strategic Housing Market Assessment (SHMA) has been produced by the Greater Manchester Combined Authority (GMCA). The purpose of the SHMA is to present a clear, evidenced picture of the Greater Manchester housing market and how it is changing, to provide an assessment of future needs for both market and affordable housing, and to explore the housing needs of different groups within the population over the next twenty years. The key outcomes are summarised below:

- Greater Manchester is a large and diverse city region which, while well connected to our neighbours, can reasonably be defined as a housing market for planning purposes.
- Greater Manchester has a very diverse population:
  - 20% of Greater Manchester residents are aged under 30;
  - Greater Manchester has a fast growing older population;
  - Greater Manchester is slightly more ethnically diverse that England and Wales as a whole;
  - There are more single person households than any other type of household;
  - Residents are increasingly likely to rent their homes in the private sector, especially the younger resident and those from black and minority ethnics communities;
  - Household incomes are significantly lower than the national average and Greater Manchester has high levels of deprivation;
  - Homelessness and rough sleeping have risen in recent years;
  - Greater Manchester has a large proportion of terrace and semi-detached houses that are one and two beds, when compared to the rest of England;
  - Around six out of ten households are owner-occupied, and almost half of those have bought the property outright. About two in ten households rent from a housing association or local authority, with the remainder renting privately;
  - Around one in twenty households are in overcrowded accommodation, concentrated in the rented sector;
  - Two-thirds of households (and 80% of owner-occupiers) have at least one spare bedroom.

- House prices in Greater Manchester as a whole have remained substantially below national averages. But Greater Manchester also has relatively low average household incomes that mean many residents find meeting housing costs a challenge.
- 85,000 households were on a local authority housing register in 2016/17, of which almost 26,000 were assessed as having a priority need for a home.
- New housebuilding continues to slowly recover from the post-2008 collapse in delivery, with the 2017/18 total of around 9,000 net additional homes being the highest since 2007/08.
- Empty dwellings are at historically low levels matching those of England as a whole.
- Greater Manchester residents have relatively poor health and a growing older population, though the population profile will still be younger than the national average. By 2035, almost one in three GM residents aged 65 or over will have a long term illness that limits day to day activities 'a lot', and just under 8% will have dementia.
- By 2035 the number of homes needed for families with dependent children will grow by almost 10%.

Local Housing Need

3.2 The SHMA also sets out the Local Housing Need for Greater Manchester. As outlined above, Government wants local authorities to have a clear and consistent understanding of the number of new homes needed in an area.

3.3 They have proposed a new standard methodology to calculate a figure for 'local housing need'. The methodology takes projected population and household growth and applies an affordability uplift to provide a local housing need figure.

3.4 This is not yet fully finalised, but we have used it to work out an annual housing need figure for Greater Manchester as a whole of 10,583 new homes per year. This includes an uplift of 1,218 homes per year to take account of signs that housing is becoming less affordable in Greater Manchester.

3.5 The total housing need figure is worked out district by district and added together to give a Greater Manchester total figure. That figure is being distributed between districts differently, through the Greater Manchester Spatial Framework process.

Methodology

3.6 The methodology for calculating Local Housing Need consists of three components. The first step is to set a demographic baseline. There is then a modification for market signals and a cap is applied to ensure that local authorities are left with a deliverable and achievable housing need figure after updating their local plans. The methodology as consulted on between 26 October and 7 December 2018 only differs from the current PPG in terms of setting the demographic baseline; the other steps remain the same.

- Step 1: Setting the baseline
- Step 2: An adjustment to take account of affordability
- Step 3: Capping of any increase

Step 1: Setting the baseline:

3.7 It is recommended that ten-year average household growth figures are used for the Local Housing Need calculation - this should be ten consecutive years using the current year as the starting point - as plans are expected to be reviewed every five years and so average growth over a ten year period gives a baseline for effective planning for the preparation and duration of the plan.

3.8 It is noted that these projections should be seen as the minimum housing need figure for the area. The 2014-based projections for Greater Manchester local authorities are set out below.

Table 3.1 Household growth projections for Greater Manchester, 2018-2028

Area	Total household growth, 2018-28	Average annual household growth over 10 year period
Bolton	7,341	734
Bury	5,256	526
Manchester	23,862	2,383
Oldham	6,532	653
Rochdale	4,667	467
Salford	12,455	1,246
Stockport	8,895	889
Tameside	5,766	577
Trafford	10,202	1,020
Wigan	8,714	871
Greater Manchester	93,654	9,365

Step 2: An adjustment to take account of affordability

3.9 The table below outlines the results of the calculations applied in Step 2 of the methodology.

Table 3.2 Median workplace affordability ratios, adjustment factors and total Local Housing Need figures for Greater Manchester

Area	Median workplace affordability ratio (2017)	Adjustment factor (based on affordaibility ratio)	Adjustment factor plus 1	Total annual local housing need (Adjustment factor plus 1 x annual projected household growth)	Total Local Housing Need over the GMSF plan period (19 years)
Bolton	5.23	0.08	1.08	791	15,029
Bury	6.51	0.16	1.16	608	11,552
Manchester	5.35	0.08	1.08	2584	49,096
Oldham	5.55	0.10	1.10	716	13,604
Rochdale	5.62	0.10	1.10	514	9,766
Salford	5.63	0.10	1.10	1372	26,068
Stockport	7.56	0.22	1.22	1087	20,653
Tameside	5.54	0.10	1.10	632	12,008
Trafford	8.94	0.31	1.31	1335	25,365
Wigan	5.34	0.08	1.08	944	17,936
Greater Manchester				10,583	201,077
(Source: ONS, Ratio of house price to workplace-based earnings (lower quartile and median) Table 5c: Ratio of median house price to median gross annual (where available) workplacebased earnings by local authority district, England and Wales, 7997 to 2077)					

Step 3: Capping of any increase

3.10 To ensure that local authorities are left with a deliverable and achievable housing need figure, the methodology includes criteria to cap the level of increase. However under this criteria, the LHN figures for all Greater Manchester districts do not require capping. The overall figure for Greater Manchester in Table 3.2 'Median workplace affordability ratios, adjustment factors and total Local Housing Need figures for Greater Manchester' above is therefore proposed as representing the local housing need for Greater Manchester.

3.11 Following the government proposed methodology (which includes adding uplift on the 2014-based household projections for affordability) means that 201,000 new homes will be required over the plan period.

Affordable Housing

3.12 We all need homes that we can afford, however trying to agree what we mean by ‘affordable’ homes can be a complex task. Government guidance tells us we should try to assess affordable housing need to help us decide how much additional housing we need overall, based on their definition of “housing for sale or rent, for those whose needs are not met by the market”, and includes affordable housing for rent, starter homes, discounted market sales housing and other affordable routes to home ownership.

3.13 The SHMA provides an assessment of affordable housing need which is compliant with Government guidance to identify whether there is a shortfall or surplus of affordable housing in Greater Manchester. The method Government asks us to follow includes estimates of:

- The need for affordable housing now
- How that might change through time
- How many affordable homes will be available to re-let as people move out of them
- How many affordable homes will be built or could be made available from empty properties

3.14 To make that calculation, we also need to make forecasts and assumptions about a range of things including how many and what type of households will emerge in the future, how many might be homeless, in temporary accommodation or overcrowded, what household incomes might be and the future costs of renting and buying property, across different parts of Greater Manchester.

3.15 This is something we need to consider in developing the Greater Manchester Spatial Framework and in our work with Homes England, housing providers and other partners to deliver the affordable homes we need for the future. This will be delivered in a variety of ways, including new build homes, a wide range of funding programmes from Homes England, including their Shared Ownership and Affordable Homes Programme and funding for specialist forms of affordable housing, such as extra care provision.

3.16 The link between the affordable housing need and the overall need for housing (or the local housing need) is complex. Many of the households in need are already living in accommodation (existing households) and simply require an alternative form of housing, and the analysis does not suggest that there is any strong evidence of a need to allocate additional housing land specifically to help address the affordable need.

3.17 It should be stressed that these final figures are not targets for affordable house building but a check to understand likely future demand. Besides delivery of affordable housing from planning obligations, there are also a number of other mechanisms which could deliver affordable housing. These include a wide range of funding programmes from Homes England, including their Shared Ownership and Affordable Homes Programme and funding for specialist forms of affordable housing, such as extra care provision. Other sources such as Community Land Trusts may also deliver new affordable housing. Net changes in affordable housing stock may also be influenced by estate regeneration schemes, as well other factors such as the proposed extension of the Right to Buy to housing association properties.

Greater Manchester Housing Land Supply

3.18 The Greater Manchester Housing Land Supply (GM HLS) forms a key component of the evidence base to support the delivery of housing to meet adopted housing targets set through the GMSF and assesses the supply of housing land against GMSF housing requirements.

3.19 Each of the ten Greater Manchester districts has carried out their own assessment of housing land availability and prepared their own Strategic Housing Land Availability Assessment (SHLAA). The GM HLS brings together information from each of the ten districts to identify the total housing land supply across Greater Manchester.

3.20 The table below summarises the Greater Manchester housing land supply position as at 1 April 2018, based on the information presented the in Greater Manchester Housing Land Supply Statement.

Table 3.3 Housing Supply Summary

District	Remaining Units available on Sites Under Construction	Sites with Extant Planning Perm / PiP Not Started	Other district SHLAA sites	Small sites windfall allowance	Allowance for losses	Total 2018-2037	Post-2037
Bolton	2,223	4,232	5,862	3,066	-760	14,623	0
Bury	745	551	3,120	280	0	4,696	0

District	Remaining Units available on Sites Under Construction	Sites with Extant Planning Perm / PiP Not Started	Other district SHLAA sites	Small sites windfall allowance	Allowance for losses	Total 2018-2037	Post-2037
Manchester	8,621	11,681	36,124	3,052	-1,655	57,823	7,778
Oldham	1,123	1,906	7,734	462	-95	11,130	75
Rochdale	1,767	2,421	5,961	238	-1,130	9,257	0
Salford	12,440	7,840	15,545	1,666	0	37,491	0
Stockport	2,174	1,104	7,726	770	0	11,774	200
Tameside	1,059	1,503	4,576	798	0	7,936	0
Trafford	2,289	2,588	8,050	434	0	13,361	0
Wigan	4,757	5,867	9,434	1,134	0	21,192	439
Greater Manchester	37,198	39,693	104,132	11,900	-3,640	189,283	8,492

3.21 The full details can be found in Appendix A: 'Greater Manchester Housing Land Supply Statement'. This sets out how GM HLS summary has been carried out and presents the findings of the assessment.

4 Summary of consultation

4.1 The first draft of the GMSF was published for public consultation for 12 weeks in October 2016. A summary of the issues that were raised during the consultation on the housing policy and SHMA is listed below.

Housing (Policy G5)

4.2 The main issues raised were:

- The split of housing development across Greater Manchester is not equal with significantly less in the south. It should be made clear how these housing targets have been set, and how this represents a sound, suitable and sustainable approach to growth across the whole of Greater Manchester.
- Comments from surrounding districts, such as High Peak who pointed out that they had a Memorandum of Understanding with Tameside and Stockport that there

would be no requirement from them to contribute to any shortfall within Greater Manchester.

- It is not clear how the phasing of new housing will be calculated. Sites with existing good infrastructure should be delivered first.
- Support for the proposed housing requirement, recognising the level and need for housing in Greater Manchester to support growth.
- The proposed housing requirement is too low and insufficient to address longstanding issues of historic under-supply and support economic growth. Planning at this level will exacerbate the current shortage of land, deepen the housing crisis, fuel affordability problems and constrain economic growth prospects and social mobility. It does not represent a sustainable option when considered against reasonable alternatives and therefore is unsound as there is no systematic evidence of the deliverability of this land. A higher housing requirement is needed.
- The proposed housing requirement is too high and represents an untenable spike in population growth and household formation. The assumptions made have little or no prospect of occurring during the specified plan period and the house building industry have little or no prospect of achieving the level of housing completions suggested as being needed.
- The proposed housing requirement is predicated on an erroneous methodology, and it must be remedied by a reassessment of both the jobs and housing evidence base.
- There needs to be more of a focus on use of existing housing stock. There is none, or very little, evidence of the analysis of empty homes across Greater Manchester and this should be addressed as a key issue.
- Many assumptions that expensive housing will be built in favour of affordable housing. It was assumed that this expensive housing would be built on Green Belt rather than there being a focus on more affordable homes on brownfield sites.
- There should be a clear policy of brownfield land being developed first before greenfield land and Green Belt. Any Green Belt development should be a last resort and if required, clearly allocated to provide social housing.
- Current physical and social infrastructure cannot cope with the proposed scale of development. The proposed housing development required cannot go ahead before infrastructure is put in place.
- There was no detail on the tenure mix of any new housing and there should be a clear statement of the overall mix required. A strategic plan should inform the direction of the required tenure mix within local plans.
- There is too much emphasis on the building of apartments rather than houses, in particular family homes, especially in Manchester where house types need to include starter homes; homes for families, including inner-city housing that is suitable for family living; homes for disabled people; and accessible housing to allow older people to 'age in place'.
- The housing calculations had been undertaken before the UKs decision to leave the EU had been agreed and therefore Brexit will seriously undermine the proposed

housing projections. As a consequence of the perceived reduction in net immigration the amount of land required for new household formation will be less and therefore Brexit calls into question the housing figures and whether the release of Green Belt will be required.

- There is a need for specific housing to meet the needs of the older population; apartments are rarely designed to meet the needs of older people. There is evidence to suggest that some older people would prefer to down-size from housing in the suburbs and move to the city centre in order to benefit from living in proximity to Manchester's vibrant city centre culture. The city should be designing suitable age-friendly housing in the city, including in the city centre to stop the net outflow of older people as well as to encourage downsizing
- New housing development should support good health. GM needs to eliminate bad housing conditions in new developments, overcrowding, insecurity of tenure and poor physical conditions that all contribute to a risk to health. Housing needs to be adaptable to be able to accommodate a range of people to allow for changing demographics of the population.

5 Summary of IA

5.1 The GMCA commissioned ARUP to complete an Integrated Assessment of the first draft of the GMSF.

5.2 The Integrated Assessment is a key component of the GMSF evidence base, ensuring that sustainability, environmental, quality and health issues are addressed during its preparation. The Integrated Assessment combines the requirements and processes of the Sustainability Appraisal, Strategic Environmental Assessment, Equality Impact Assessment and the Health Impact Assessment into one document. The Habitat Regulation Assessment of the GMSF was completed separately by GMEU. The Integrated Assessment carries out an assessment of the draft GMSF policies by testing the potential impacts and consideration of alternatives are against the plans objectives and policies. This ensures that any potential impacts on the aim of achieving sustainable development considered and that adequate mitigation and monitoring mechanisms are implemented.

5.3 The outcome of the assessment on the housing policies in the Draft GMSF is summarised below. These have been considered to inform the production of the Revised Draft GMSF.

Housing Policy (Policy G5)

- Transport/accessibility is mentioned in terms of sustainable transport and locating near to existing transport infrastructure.
- Supporting/essential infrastructure for housing is mentioned and the policy recognises the importance of walking and cycling.

- The policy will have indirect and positive effects on deprivation likely from investment and building of homes. Also improvement of housing stock will affect living environment domain of IDM.
- Policy does not mention employment land, local centres, education/health care facilities and green spaces or the desirability of co-location with housing.
- The policy does not mention energy efficiency in new housing, although the GMSF policy on carbon emissions is noted.
- The policy should state the need for water efficiency.
- There is potential for negative air quality effects from new trips to new housing. Addressing air quality impacts should be mentioned.
- The policy should stress the importance of new public transport, active transport connection and travel plans for new strategic locations, and require air quality assessment and mitigation in all new development where air quality issues may be exacerbated by significant numbers of new homes.
- The policy may affect deprivation overall through investment. Direct impacts will be through job creation during construction of sites. However, development near to deprived areas is not guaranteed to have a positive impact. The policy should consider how to ensure economic benefits flow into the local area.
- The policy should recognise existing communities near to new development, and the need to integrate new development to help foster good relations. Similarly, the policy should recognise the different needs of urban, suburban, urban fringe and rural areas.
- The policy should state the importance of redeveloping previously developed land; avoiding (where possible) best and most versatile (BAMV) agricultural land and bringing derelict land, properties, buildings and infrastructure back into use.

6 GMSF Strategy, Policies and Allocations

Implications for the Revised GMSF

6.1 This section outlines the proposed housing policies set out in the Revised Draft GMSF, taking account of the policies, legislation and guidance in 2 'Policy context', the findings of the evidence studies outlined in 3 'Summary of evidence' and the issues raised from the Integrated Assessment and public consultation on the Draft GMSF in 4 'Summary of consultation' and 5 'Summary of IA'.

6.2 In the 2016 draft GMSF there was one main policy relating to the provision of housing, policy GM5. This sole policy mainly focused on the overall housing requirement, distribution across the 10 Greater Manchester authorities and the phasing of delivery over the plan period. Changes are proposed to this approach in response to the ongoing development of evidence, stakeholder engagement, public consultation and the recommendations of the 2016 Integrated Assessment.

6.3 It is now proposed to have a group of policies which relate to the delivery of housing across Greater Manchester.

Policy GM-H 1 Scale of New Housing Development

6.4 The amount of new housing that Greater Manchester needs to provide is driven by demographic changes and proposed scale of economic growth. If insufficient new homes are provided to meet increasing demand, then there is a risk that affordability levels will worsen and people will not have access to suitable accommodation that meets their needs. The construction of new housing is also an important part of the economy, providing large numbers of jobs and often securing the redevelopment of derelict and underused sites.

6.5 The economic opportunities and quality of life that Greater Manchester can offer make it an attractive place for people to move to. This not only includes younger adults drawn by the universities, graduate jobs and lifestyle offer but also families attracted by the long-term prospects for their children, and older people wanting to take advantage of the wide range of cultural and leisure facilities.

6.6 Government wants local authorities to have a clear and consistent understanding of the number of new homes needed in an area. The standard Government methodology takes projected population and household growth and applies an affordability uplift to provide a local housing need figure. Following this government methodology means that around 201,000 new homes will be required over the plan period. Further details on how the Government methodology has been applied can be found in the Local Housing Need section.

6.7 The scale of new housing proposed across Greater Manchester is a minimum of 201,000 net additional dwellings over the period 2018-2037, equating to an annual average of 10,580 dwellings per year.

Meeting the Local Housing Need

6.8 The Greater Manchester baseline housing land supply does not contain enough land to meet to our Local Housing Need (LHN). Therefore additional land needs to be identified to cover the shortfall.

6.9 In order to demonstrate to a Planning Inspector (at the Examination in Public) that Greater Manchester has identified sufficient housing land to meet the Greater Manchester LHN target of 201,077 the GMSF needs to include an appropriate level of flexibility in the overall land supply. This flexibility will need to make a reasonable allowance for the possibility that some sites in the overall supply may not come forward as currently envisaged whilst also enabling a degree of choice to be incorporated into the delivery of sites. Adopting such an approach will mean that Greater Manchester will be able to ensure that the target remains deliverable whilst reducing the risk of additional greenfield/Green Belt sites being approved via planning appeal during the plan period.

6.10 Introducing a level of flexibility in this way should not however result in the Greater Manchester housing target being inflated. Taking such an approach would actually remove the flexibility in the housing land supply, thereby defeating the objective of the approach outlined above.

6.11 There is no national guidance on how such an allowance for flexibility should be calculated. Having carried out a high-level desktop review of recently examined/adopted plans, it is clear that a number of alternative approaches have been followed by local authorities in plan making. These include discounting a proportion of the supply or allowing a buffer for flexibility and choice, or a combination of the two.

6.12 Following this review it is considered that Greater Manchester should identify sufficient housing land for somewhere between 5% and 10% above the LHN to ensure an appropriate level of flexibility and choice has been taken into consideration. Following such an approach will mean that Greater Manchester will be able to demonstrate it can meet its LHN.

6.13 To identify sites to meet this shortfall a site selection process was undertaken in line with the GMSF objectives and spatial strategy. Further information on this process can be found in the Site Selection Topic Paper.

6.14 Having combined the baseline supply (189,283) with the potential allocations identified through the site selection process (29,266) sufficient land has been identified for 218,549 dwellings.

6.15 This represents 9% over the Greater Manchester LHN (201,077). Given the conclusion above it is considered that this represents a reasonable degree of flexibility in the housing land supply to ensure that Greater Manchester can demonstrate it can meet its LHN.

6.16 The overall Greater Manchester housing land supply has been distributed to seek to achieve the Greater Manchester Spatial Strategy. The distributed figure forms the housing target for each district and the collective Greater Manchester housing target and reflects the housing aspirations for the city region and supports the long-term economic success of Greater Manchester. This approach results in all districts meeting at least 70% of the LHN and no more than 125%.

6.17 Information on the release of the Green Belt under exceptional circumstances can be found in the Green Belt Topic Paper.

Distribution of new housing development within Greater Manchester

6.18 The highest levels of population growth in Greater Manchester are expected to be in the two cities of Salford and Manchester, with the next highest levels being in the two southern districts of Trafford and Stockport. The only northern district forecast to have a rate of population growth close to the Greater Manchester average is Oldham. This projected demographic change largely mirrors the pattern of recent and forecast economic growth. If these trends continue unchecked then inequalities within Greater Manchester could widen significantly, with prosperity increasingly focused in the centre and south, and northern areas lacking the scale and quality of housing investment to support their regeneration and enable them to make a full contribution to the future economic success of Greater Manchester.

6.19 In order to help address these issues, higher levels of housing growth will be focused in the central and northern districts of Greater Manchester. Manchester and Salford will continue to be an appropriate location for the highest levels of new housing due to their central location, good public transport connections, proximity to the main concentrations of employment and leisure opportunities, and ability to deliver very high density developments. Supporting higher levels of new housing in the northern districts will assist in achieving a more balanced pattern of growth across Greater Manchester and a better distribution of skilled workers to support local economies, helping to reduce disparities. The proposed distribution of housing development also reflects the availability of suitable sites in each of the districts.

6.20 The distribution of new housing development across Greater Manchester over the period 2018-2037 will be broadly in accordance with Table 6.1 'Distribution of new housing development across Greater Manchester (2018-2037)':

Table 6.1 Distribution of new housing development across Greater Manchester (2018-2037)

District	Target 2018-2023		Target 2023-2037		Total target		Total target as % of LHN (rounded)
	Annual	Total	Annual	Total	Annual average	Total 2018-2037	
Bolton	520	2,600	800	11,200	726	13,800	92%
Bury	270	1,350	580	8,120	498	9,470	82%
Manchester	2,870	14,350	2,870	40,180	2,870	54,530	111%
Oldham	450	2,250	860	12,040	752	14,290	105%
Rochdale	640	3,200	640	8,960	640	12,160	125%
Salford	1,720	8,600	1,720	24,080	1,720	32,680	125%
Stockport	580	2,900	830	11,620	764	14,520	70%
Tameside	370	1,850	500	7,000	466	8,850	74%
Trafford	720	3,600	1,120	15,680	1,015	19,280	76%

District	Target 2018-2023		Target 2023-2037		Total target		Total target as % of LHN (rounded)
	Annual	Total	Annual	Total	Annual average	Total 2018-2037	
Wigan	1,060	5,300	1,150	16,100	1,126	21,400	119%
Greater Manchester	9,200	46,000	11,070	154,980	10,578	200,980	100%

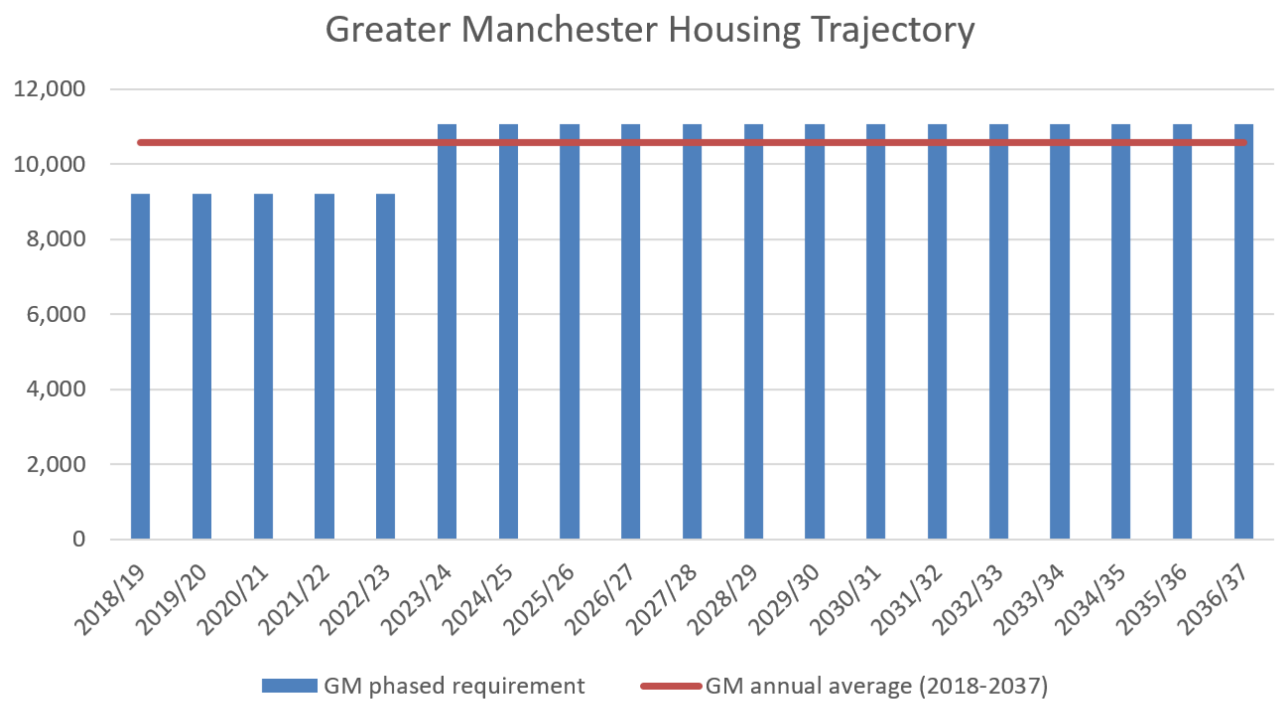
Phasing of new housing development in Greater Manchester

6.21 The average annual housing requirement for Greater Manchester of 10,583 net additional dwellings per annum has only been achieved twice in recent years, in 2006/07 and 2007/08, at the peak of the housing market. Following the 2008 global financial crisis, annual housing completions dropped to less than 4,000, but gradually recovered to almost 9,000 in 2017/18. Consistently achieving this scale of development will only be possible with help from major Government funding, and it will take a couple of years to build up to it.

6.22 The masterplanning and infrastructure investments required to support the development of some sites, including many of the allocations in the GMSF, means that they may only produce large numbers of new dwellings in the second half of the plan period. In some locations, such as town centres, it will be necessary to develop a new market for housing, which is vital to delivering the overall strategy for Greater Manchester but will take some time to achieve.

6.23 In order to allow districts to demonstrate a five year supply, a phasing approach has been applied. This approach gives all districts at least a 6% buffer on their supply across the plan period. Greater Manchester would have a collective 9% buffer on the total GM target.

6.24 Taking all of these factors into account, it is anticipated that there will be around 9,200 housing completions on average up until 2023, accelerating to an average of around 11,070 net additional dwellings per annum up to 2037. This trajectory is shown below.



Delivering Markets to Deliver Numbers

6.25 The GMCA has been proactive in identifying a range of schemes and mechanisms that, when fully developed, will boost housing growth across its constituent authorities in the long term.

Housing Investment Loan Fund

6.26 As part of the Greater Manchester Devolution Agreement, Greater Manchester secured £300 million recyclable funding from Government over a ten year period to develop a Housing Investment Loan Fund (HILF). HILF provides traditional development finance to support housing growth across Greater Manchester, aiming to encourage, accelerate and unlock residential housing schemes through competitive pricing and lending structures for private sector-led schemes.

6.27 The £300m Housing Investment Loans Fund is now in its fourth year of operation and has committed £421m of funding to support the delivery of 5,500 units across Greater Manchester, with over 1,000 units completed to date. The current cash surplus generated from GMHILF investment is around £2m with no restrictions attached to its expenditure.

6.28 The GMCA is targeting the utilisation of surpluses from the GMHILF as revenue and capital funding to support the delivery of social rented homes across the city region and to bring empty homes back into use. It will also be used to help support work to tackle and address issues in the private rented sector.

Housing Package

6.29 In March 2018 an ambitious Housing Package between the GMCA and Government was announced. It sets out aims to better coordinate the planning, decision-making and delivery of housing across the city region. It will deliver significant and sustained investment that maximises Greater Manchester's growth potential and brings forward a pipeline of housing development across the city region.

6.30 The deal with Government potentially provides Greater Manchester with:

- A Land Fund of up to £50m capital
- Up to £8m of capacity funding to support delivery
- Four Housing Infrastructure Fund (Forward Fund) bids through to 'co-development' stage
- More flexibility to recycle the Housing Investment Loan Fund, allowing us to deliver more homes
- Commitment to joint working with GM on affordable housing delivery and the Land & Infrastructure Commission

6.31 The Housing Package gives Greater Manchester more local control on funding to remediate brownfield sites and bring them forward for housing, more capacity to help districts do the work behind the scenes to make that happen, and a Land & Infrastructure Commission to coordinate that and to challenge Government to do more to make public land available for housing. Negotiations are ongoing to agree the final details of the Package with Government.

GM Place Team

6.32 Enabling the delivery of new homes at the scale necessary requires an enhanced and suitably resourced approach to developing and managing the city region's development pipeline. The establishment of the Greater Manchester Place Team is central to the task of turning the Greater Manchester pipeline of potential sites into viable, deliverable, investable schemes which can then be brought forward for development.

6.33 The Place Team is supporting the appropriate allocation of resources into site investigation and preparation where this aides the delivery of new housing. Working with district authorities on a match funding basis, they are bringing forward schemes that meet the relevant value for money and deliverability criteria for the receipt of public funding support. Resources are being deployed where they will unlock delivery.

One Public Estate

6.34 Greater Manchester is working together and breaking down historical barriers to get the best use of public land and property through the One Public Estate (OPE) programme. The programme is catalysing and supporting joint estates planning across public partners to unlock development potential by rationalising public sector land and buildings.

Town Centres

6.35 Town centres are critical to the future success of all parts of Greater Manchester and the Mayor is bringing forward proposals for how town centres can be re-purposed and modernised through transformational development and become quality places to live and work.

6.36 The Mayor's Town Centre Challenge was launched in November 2017 to regenerate nominated town centres across Greater Manchester. Through the initiative, the Mayor is offering his convening powers to bring together stakeholders and partners to unlock the potential residential development of town centres, and glavanise delivery and change.

6.37 Stockport's Town Centre West is among the towns benefiting from the initiative. To support the plans for the town, the Mayor is consulting on the creation of a Mayoral Development Corporation (MDC). A MDC is a statutory body created to bring forward the regeneration of a defined area and is provided powers to acquire, develop, hold, and dispose of land and property. In Greater Manchester, we have developed a model that would allow us to harness the potential of MDCs to bring about large-scale regeneration while ensuring they fit with our unique local circumstances and do not create major additional bureaucracy. If endorsed through the consultation, the Stockport MDC would see the creation of a Board to provide overall direction with a smaller staff structure to bring forward plans for the town.

New models of provision

6.38 A number of members of the GM Housing Providers group and the GMCA have established and invested in a joint venture vehicle, to deliver additional new homes in the city region over and above housing providers' ongoing programmes of new affordable homes. The vehicle will acquire land, in the first instance, from Greater Manchester districts and build market for sale houses. The level of affordable housing provided and any S106 contributions on specific sites will be determined by negotiation with individual districts. This will be an ambitious new entrant in the Greater Manchester market, with an objective to deliver 500 homes a year.

6.39 We are also working in partnership with Homes England, North West Housing and Irwell Valley Housing Association to support the development of cooperative and community-led housing projects across the conurbation. Greater Manchester is the home of the co-operative movement, and the GMCA is a member of the Co-operatives Councils' Innovation Network (CCIN). Our objective is to create clear pathways and effective support for community organisations to help them to set up and deliver community-led housing projects, as a further addition to the mix of housing supply.

Policy GM-H 2 Affordability of New housing

6.40 A key challenge and priority for Greater Manchester is to ensure that new housing comes forward at a price that potential occupiers can afford. Overall, Greater Manchester is a relatively affordable place to live on average compared to some other parts of the UK, particularly London and the South. This is an important aspect of the competitiveness of Greater Manchester that will need to be maintained if high levels of economic growth are to be delivered, and all residents are to share in its benefits.

6.41 However, affordability has been worsening in recent years, and there are a significant number of households who are unable to find suitable homes at an affordable cost. The cost of housing is a challenge to different cohorts within the housing system - including those needing access to social rent or trying to maintain a tenancy as welfare rules are squeezed; private renters sharing; those saving as prospective First Time Buyers looking for routes into home ownership; people in unstable employment in any tenure; older owner-occupiers without the resources to maintain a decaying property, or people living in overcrowded properties because they cannot afford or access a home large enough to meet their needs. As a result, some people are living in inadequate accommodation and/or spending an unacceptably large proportion of their income on housing, which in turn increases levels of poverty. The official definition of affordable housing does not adequately address the diverse range of need within Greater Manchester. Through its housing strategy, currently in preparation, Greater Manchester will define its approach to affordable housing.

6.42 There are currently over 85,000 households on the local authority registers, with almost 30,000 of these identified as being in priority need. Priority need is usually referred to as 'reasonable preference' as per the 1996 Housing Act (Part 6). It is estimated that around 38% of newly forming households are unable to afford to buy or rent a home at lower quartile prices. The lower quartile is the point at which one-quarter of properties are cheaper to buy/rent, and three-quarters are more expensive, representing a typical entry point property for new households prices. New build is just one of the ways to meet this need.

6.43 Consequently, increasing the delivery of affordable housing across Greater Manchester is a very high priority, and it will be essential that new residential developments play a full role in supporting this. There are a variety of ways of delivering affordable housing and the emphasis in some parts of Greater Manchester may be on increasing the supply of social rented and affordable rented properties, reflecting the low incomes of many households in need. In other parts, alternative types of affordable housing may also be suitable, such as shared ownership, affordable market rent, and discount market sales.

6.44 In doing this it will be important to ensure that a diverse mix of values and tenures of new housing comes forward so that all households can meet their needs and aspirations, helping to ensure that Greater Manchester can attract and retain skilled workers, bring more money into local economies and deliver more mixed and inclusive communities.

Policy GM-H 3 Type, Size and Design of new housing

6.45 Increasing the supply of affordable homes is an essential component of the overall strategy, but it will be important to ensure that a diverse mix of values and tenures of new housing comes forward so that all households can meet their needs and aspirations.

6.46 Greater Manchester is in competition with cities across the world to attract and retain the skilled workers that will be critical to delivering high and sustained levels of economic growth. It already has some particularly attractive residential neighbourhoods, several of which can command very high house prices, both within the high-density areas of the City Centre and The Quays, and in some of the lower density suburbs. Many of the higher value suburban neighbourhoods are located in the south of Greater Manchester, forming part of a much larger high-value area extending into north Cheshire, although there are smaller and more dispersed prosperous housing areas elsewhere in the sub-region.

6.47 A key aim of the GMSF is to boost the supply of new homes, in some areas this will help to diversify local housing markets that are often dominated by low-cost housing, bring more money into local economies, and deliver more mixed and inclusive communities. It will also help to increase the options for skilled workers looking to move into or within Greater Manchester. Focusing a significant proportion of housing growth in the northern areas will assist in this, supported by selectively releasing Green Belt sites to deliver a diverse mix of values and tenures that includes affordable homes as well as some higher value housing, (relative to prevailing values in the local area), within a high quality environment. This will help to achieve a better spread of higher value housing and prosperity across Greater Manchester, whilst also delivering greater diversity within individual areas.

6.48 A diverse range of housing will be required to meet population and household growth in Greater Manchester. Around three-quarters of the population increase is projected to be aged 65 and over, with less than one-tenth aged under 18. Indeed, those aged 65 and over are projected to account for all population growth in five of the individual districts in Greater Manchester, Bolton, Bury, Rochdale, Tameside and Wigan, based on the ONS 2016-based subnational population projections, with each seeing a decline across other age groups.

6.49 A key part of the overall strategy is to maximise the amount of development on brownfield sites in the most accessible locations, and minimise the loss of greenfield and Green Belt land as far as possible. In order to deliver the necessary densities, an increasing proportion of new dwellings will be in the form of apartments and town houses, continuing recent trends.

6.50 Smaller households are forecast to account for over half of the growth in households. It is anticipated that this will further strengthen the demand in apartments, particularly given cost pressures and the increased reliance on private rented accommodation. However, some single and couple households will want or need to live in larger dwellings, for example to facilitate home-working or accommodate visiting relatives. There is scope to increase the number of families living in apartments, especially if higher density neighbourhoods can be made more inclusive for all age groups.

6.51 The ageing population will necessitate a renewed emphasis on ensuring that a diverse range of housing is available to meet the needs of older people and households. This will require new dwellings to be more adaptable, and designed with potential care needs in mind, so that older people can remain in their homes if they wish as their circumstances change. There also need to be much better options for those who would like to move, perhaps to a dwelling of a more appropriate size in a location that enables them to easily access local services and facilities, and this could help to release some existing houses for families with dependent children.

6.52 The UK has the smallest average new-build dwellings in Europe and cost considerations for both developers and households are placing further downward pressure on dwelling size. This potentially creates a number of problems, resulting in less adaptable dwellings that are unable to respond to the changing needs of households, poor health resulting from cramped conditions and overcrowding, and overall a lower quality of life. The lack of space can also inhibit home-working, which will be increasingly important in helping to minimise the need to travel and enabling Greater Manchester to take advantage of digital-based business opportunities. It is therefore essential that new housing achieves minimum standards that will help to ensure that it is able to meet identified needs and contributes to rather than detracts from the relative attractiveness of Greater Manchester as a place to live. The provision of appropriate outdoor private amenity space will also be vital in delivering high quality homes that support good health.

Policy GM-H 4 Density of New Housing

6.53 Increasing the average density of new housing developments in the most accessible locations is an important part of the overall strategy for Greater Manchester, providing a number of benefits. It will reduce the amount of land that needs to be used for development, thereby assisting the protection of greenfield and Green Belt land. It will help to minimise the need to travel, enabling more people to live close to shops and services, and increasing the local population necessary to support local facilities and support regeneration. It will also maximise the number of people living in the most accessible places, helping to increase the proportion of trips made by walking, cycling and public transport, and reducing the demand for car-based travel. The approach to housing densities directly supports the objectives of the Mayor's Town Centre Challenge.

Appendix A: Greater Manchester Housing Land Supply Statement

Greater Manchester Housing Land Supply Statement

Executive Summary

This report sets out Greater Manchester's housing land supply position as of 1 April 2018 and is part of the evidence base for the Greater Manchester Spatial Framework (GMSF). It has been prepared jointly by the ten Greater Manchester Local Authorities and in accordance with national planning guidance.

Greater Manchester's Housing Land Supply position as of 1 April 2018 is summarised in the tables below.

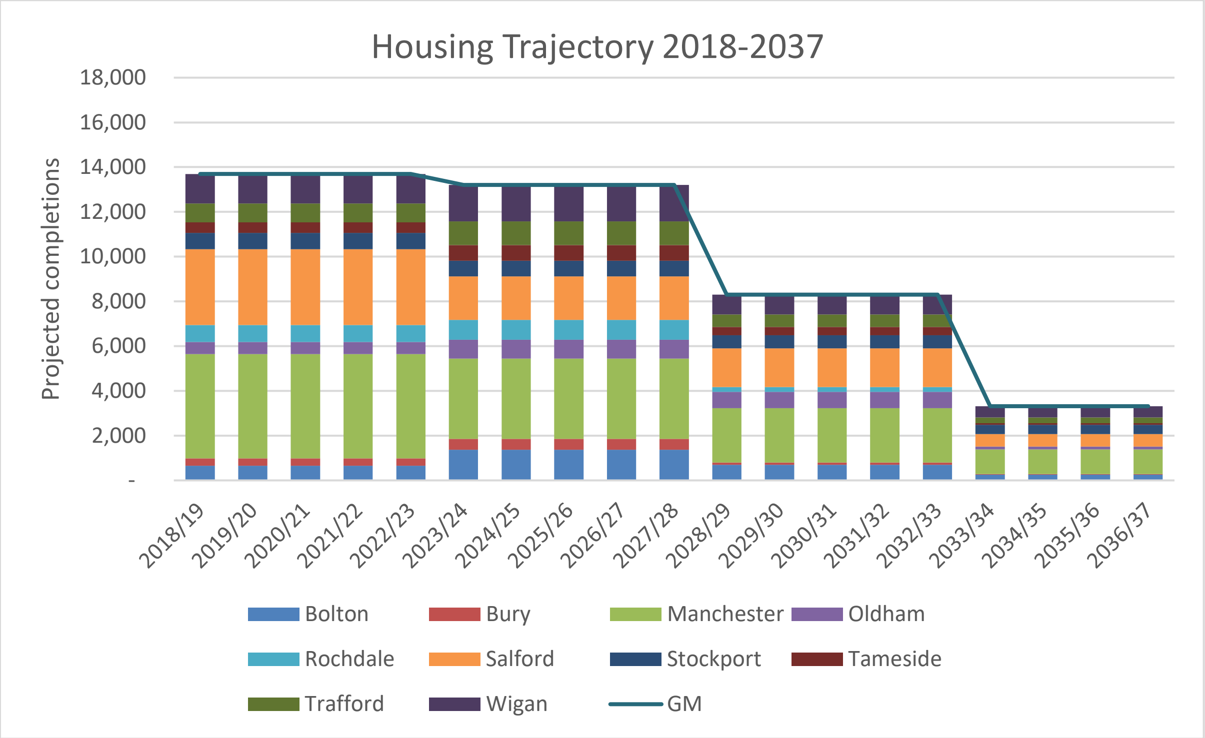
Table 1: Housing Supply Summary (2018-2037)

District	Remaining Units available on Sites Under Construction	Sites with Extant Planning Perm / PiP Not Started	Other district SHLAA sites	Small sites windfall allowance	Allowance for losses	**Total 2018-2037**	Post-2037 identified supply
Bolton	2,223	4,232	5,862	3,066	-760	**14,623**	0
Bury	745	551	3,120	280	0	**4,696**	0
Manchester	8,621	11,681	36,124	3,052	-1,655	**57,823**	7,778
Oldham	1,123	1,906	7,734	462	-95	**11,130**	75
Rochdale	1,767	2,421	5,961	238	-1,130	**9,257**	0
Salford	12,440	7,840	15,545	1,666	0	**37,491**	0
Stockport	2,174	1,104	7,726	770	0	**11,774**	200
Tameside	1,059	1,503	4,576	798	0	**7,936**	0
Trafford	2,289	2,588	8,050	434	0	**13,361**	0
Wigan	4,757	5,867	9,434	1,134	0	**21,192**	439
GM	37,198	39,693	104,132	11,900	-3,640	**189,283**	8,492

Table 2: GM Housing Land Supply – trajectory

District	2018-2023	2023-2028	2028-2033	2033-2037	**Total 2018-2037**	Post-2037 identified supply
Bolton	3,257	6,881	3,469	1,016	**14,623**	0
Bury	1,692	2,411	488	105	**4,696**	0
Manchester	23,279	17,941	12,159	4,444	**57,823**	7,778
Oldham	2,700	4,229	3,694	507	**11,130**	75
Rochdale	3,815	4,432	1,022	-12	**9,257**	0
Salford	16,931	9,686	8,643	2,231	**37,491**	0
Stockport	3,649	3,542	2,950	1,633	**11,774**	200
Tameside	2,312	3,460	1,888	276	**7,936**	0
Trafford	4,239	5,281	2,804	1,037	**13,361**	0
Wigan	6,610	8,135	4,417	2,030	**21,192**	439
GM	68,484	65,998	41,534	13,267	**189,283**	8,492

Figure 1: Housing trajectory



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Important Notice – Disclaimer

In relation to the information contained within this report (and any other report relating to the findings of the Greater Manchester Housing Land Supply Statement (GMHLSS)), please note the following disclaimer, without prejudice:

- The identification of potential housing sites, buildings or areas within the GM HLSS does not imply that the relevant Local Planning Authority (LPA) would necessarily grant planning permission for residential development. All planning applications incorporating residential development will continue to be treated against the appropriate development plan and material planning considerations. For example, some of the sites identified in the GM HLSS are currently being used for employment purposes and any planning application to change the use of these sites to residential would be assessed against planning policy that seeks to protect employment land and other material planning considerations;
- The inclusion of potential housing sites, buildings or areas within the study does not preclude them from being developed for other purposes. For example, many of the sites identified are still in employment use and the redevelopment of these for further employment use would generally be considered appropriate;
- The boundaries that are attached to sites, buildings and areas are based on the information available at the time. The GM HLSS does not limit an extension or contraction of these boundaries for the purposes of a planning application;
- The exclusion of sites, buildings or areas from the study (either because they were never identified or are identified as 'constrained potential' or have been 'discounted') does not preclude the possibility of planning permission for residential development being granted on them or for these sites to be allocated. It is acknowledged that sites will continue to come forward (particularly small sites) that will be suitable for residential development that have not been specifically identified in the GM HLSS;
- The categorisation of sites in terms of when they may come forward (short, medium or long term) is based on information held at the base date of the study (1 April 2018). Circumstances or assumptions may change which may mean that sites could come forward sooner or later than originally envisaged. The GM HLSS does not prevent planning applications being submitted on any sites identified or excluded within it at any time;
- The information that accompanies the GM HLSS is based on information that was available at the time of the study and there may be some omissions and/or factual inaccuracies which GMCA does not take liability for. Therefore, users of the GM HLSS findings will need to appreciate that there may be additional constraints on some sites that were not identified at the time of the survey and that planning applications will continue to be treated on their own merits at the time of the planning application rather than on the information contained within this assessment. Likewise, some of the identified constraints may have been removed since the information was compiled. Issues may arise during the course of a detailed planning application that could not / were not foreseen at the time of the study. Applicants are therefore advised to carry out their own analysis of sites to identify any constraints or other information for the purposes of a planning application and not rely solely on the findings of the GM HLSS;
- The capacity identified on the sites either relates to the numbers granted within a planning permission (where applicable) or is an estimate based on an appropriate density for the site in question. In arriving at these densities, Officers have taken into account locational and sustainability factors along with issues around local character and general views on the site. However, the capacities identified do not preclude densities being increased on sites, subject to details. Nor does it mean that the densities envisaged within the assessment would be appropriate and these would need to be assessed through the normal planning process when submitting a planning application.
- The study has a base date of 1st April 2018 and the findings are only a 'snap-shot' of information held at that time. Therefore, some of the information held on the database will be subject to change over time. For example, sites that are identified

as not having planning permission may have secured permission since the information was compiled, whilst planning permissions may have lapsed on other sites. The GM HLSS will be updated annually and/or at key stages of the preparation of the GMSF as necessary.

Part A – Introduction and Methodology

1) Introduction

1.1.1 The National Planning Policy Framework (NPPF) sets out the national policy direction for the delivery of housing through the planning system. One key objective of the Government is to significantly boost the supply of homes. The NPPF requires strategic policies to make sufficient provision for housing development, looking ahead over a minimum of 15 years from adoption, and provide a clear strategy for bringing sufficient land forward, and at a sufficient rate, to address objectively assessed needs over the plan period. It seeks to make effective use of land by making as much use as possible of land that has been previously developed, including land and buildings that are vacant or derelict.

1.1.2 Paragraph 67 of the NPPF states that strategic policy-making authorities should have a clear understanding of the land available in their area through the preparation of a Strategic Housing Land Availability Assessment (SHLAA). From this, planning policies should identify a sufficient supply and mix of sites, taking into account their availability, suitability and likely economic viability.

1.1.3 The National Planning Practice Guidance (PPG) states that SHLAAs should provide an assessment of land which is suitable, available and achievable over the plan period. To meet this objective, authorities should identify specific sites and broad locations that will enable continuous delivery of housing over the Local Plan period. Local authorities are also required to identify specific deliverable sites to deliver sufficient housing to meet housing targets over a rolling five-year period.

1.1.4 SHLAA's are expected to form a key component of the evidence base to support the delivery of housing to meet adopted housing targets, which for Greater Manchester will be set through the Greater Manchester Spatial Framework (GMSF).

1.1.5 Each of the ten Greater Manchester district's has carried out their own assessment of housing land availability and prepared their own SHLAA. This GM HLSS brings together information from each of the ten districts to identify the total housing land supply across Greater Manchester.

1.1.6 It is important to note that whilst this GM HLSS is an important evidence source to help inform the plan-making process, it will not in itself determine whether a site should be allocated for housing development or whether planning permission would be granted for residential development.

1.1.7 This summary report sets out how Greater Manchester's Housing Land Supply summary has been carried out and presents the findings of the assessment.

2) Background

2.1.1 The GM HLSS forms part of the evidence base to assess the supply of housing land against GMSF housing requirements. Each district has carried out their own Strategic Housing Land Availability Assessment in accordance with the PPG.

2.1.2 In line with the PPG, SHLAAs should:

- Identify sites and broad locations with potential for development;
- Assess their development potential; and
- Assess their suitability for development and the likelihood of development coming forward (the availability and achievability).

2.1.3 The results of the SHLAA can then be used to:

- Help an authority to identify how much housing can be delivered within an area;
- Show whether or not housing targets can be delivered over the plan period (or at least in the short to medium term);

- Demonstrate a continuous, flexible and responsive supply of housing can be provided;
- Provide some comfort to the housebuilding industry about the suitability of sites with housing potential;
- Provide an evidence base for the decision making process; and
- Help inform other initiatives and strategies that may be undertaken by the GM Local Authorities and GMCA.

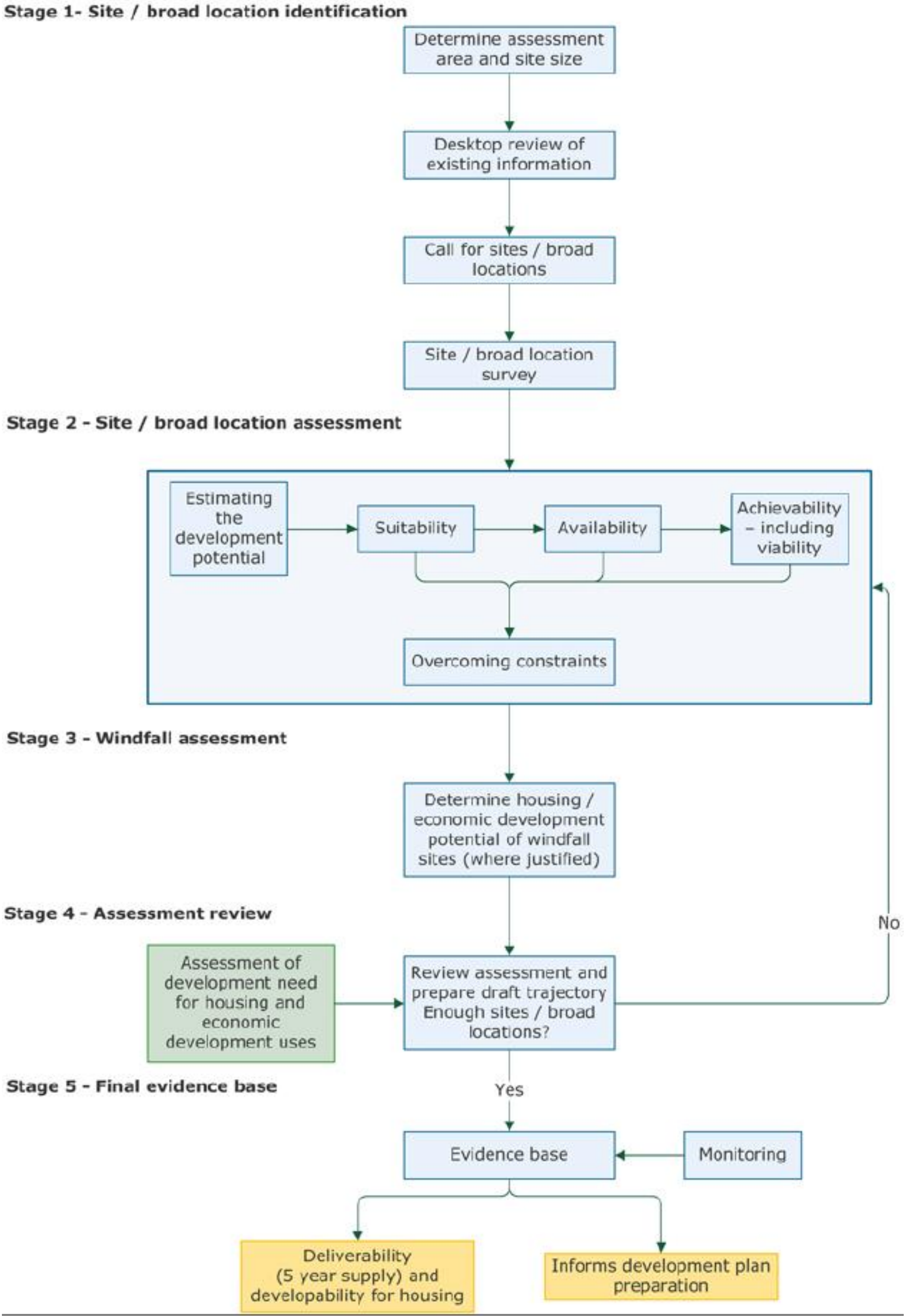
3) Methodology

3.1 Strategic Housing Land Availability Assessments

3.1.1 Each district produces a Strategic Housing Land Availability Assessment (SHLAA) which identifies sites that are considered to potentially be suitable and deliverable for housing. This statement collates the information from each district to provide a summary of the Greater Manchester Housing Land Supply, as at 1 April 2018.

3.1.2 The National Planning Practice Guidance (PPG) sets out the methodology for the assessment of land availability as shown in Figure 2:

Figure 2: Land Availability Assessment methodology



3.1.3 Whilst all ten districts apply the above methodology, there are some differences in approach, as set out in relation to each of the stages below.

3.1.4 A note of caution should be applied to the SHLAA data in that inclusion in a SHLAA does not automatically imply that the site will be made available for housing or guarantee that planning permission will be granted. The Greater Manchester districts' SHLAAs are technical studies and not policy documents. They identify possible housing sites and assess the overall housing potential but ultimately decisions on which sites would be brought forward for development will be determined through either the local plan process or the planning application process. However, that said, it is considered that this HLSS represents a realistic position in relation to the current supply of sites across Greater Manchester.

3.2 Stage 1: Site / broad location identification

3.2.1 Districts generally identify sites for inclusion from a combination of some or all of the following:

- Extant planning permissions;
- Allocations;
- Lapsed planning permissions;
- Pre-application discussions;
- Other known developer interest;
- Officer knowledge;
- Regeneration work and masterplanning;
- Clearance sites and derelict land surveys;
- Urban potential studies;
- Council assets;
- Aerial photographs;
- Map analysis;
- Call for sites;
- Original SHLAA produced by consultants;
- Assessments by other parties.

3.2.2 In addition, as part of the GMSF preparation process, in order to maximise the housing land supply and minimise the need for Green Belt release each district has, as a minimum, undertaken a search for potential housing sites for each of the following:

- Extant planning permissions;
- Allocations;
- Lapsed planning permissions;
- Developer proposals;
- Main town centres;
- Sites in close proximity to public transport nodes, such as train stations and Metrolink stops;
- Existing employment allocations;
- Unimplemented employment permissions;
- Poorly performing employment areas, for example as identified in an employment land review;
- Mills identified in the Greater Manchester mills survey;
- Safeguarded land;
- Protected open land;
- Other greenfield land around the edge of the urban area, informed by the latest open space assessment where available;
- Council-owned land;
- Sites already assessed through the SHLAA that have not been included as deliverable due to policy non-compliance but would nevertheless be preferable to Green Belt development.

Thresholds

3.2.3 The PPG advises that SHLAAs should consider all sites and broad locations capable of delivering 5 or more dwellings, and that alternative site size thresholds can be considered where appropriate. There are some differences in districts approaches to the size or capacity threshold for inclusion of sites within their SHLAAs.

3.2.4 All districts include all permissions and allocations in their SHLAAs irrespective of size. Bury, Tameside and Trafford have no thresholds for other sites. Stockport has a threshold of 0.15 hectares for sites without planning permission, apart from in the town centre area which is based on a justified assessment of the area's potential capacity. Manchester has a threshold of 10 or more dwellings for its sites. Rochdale has no threshold except for lapsed permissions (5 or more dwellings). Bolton has a 0.25 hectare threshold. Oldham has a 0.25 hectare threshold, except in town centres and within 800m of transport corridors where no threshold is applied. Salford has a 0.25 hectare threshold, except in the City Centre, Salford Quays and Ordsall Waterfront where the threshold is reduced to 0.1 hectares. Wigan has a site size threshold of 5 or more dwellings.

3.3 Stage 2: Site / broad location assessment

Density of development

3.3.1 For sites without planning permission, it is necessary to make assumptions about the potential density of development and capacity that the site could accommodate. Where appropriate districts will make allowances to convert the gross site area to a net developable area when assessing development potential for specific sites. Site yields have been reviewed on sites in more accessible locations, such as within or immediately adjoining town centres and around public transport nodes, in line with emerging GMSF policy which seeks to deliver densities appropriate to the location, reflecting the relative accessibility of the site by walking, cycling and public transport, where this is consistent with local housing market issues, such as a demonstrable need for a particular type of housing; and site-specific issues, such as the design context and any potential impact on the wider landscape or townscape. For sites with existing permissions it is assumed that the site yield will not change, unless information from the developer suggests otherwise.

Net and gross yield

3.3.2 The majority of the GM SHLAAs provide all figures as net, both in terms of specific sites that involve any gains and / or losses of housing and also for any allowances. However, Bolton, Manchester and Rochdale use gross figures for specific sites and where necessary a separate allowance will be made for demolitions and clearances and factored into this assessment.

3.4 Stage 3: Windfall assessment

3.4.1 Windfall sites are defined in the NPPF as "*Sites not specifically identified in the development plan.*"

3.4.2 For the purpose of this report, windfall sites are considered to be sites that are not specifically identified as part of the baseline supply or potential GMSF allocations. Although individual district SHLAAs may currently take differing approaches to windfall assessment, for the purposes of this report analysis has been undertaken to establish a more common approach across all districts.

3.5 Stage 4: Assessment review

3.5.1 The PPG states that once the sites have been assessed, the development potential of all sites can be collected to produce an indicative trajectory. This should set out how much housing can be provided and at what point in the future. An overall risk assessment should be made as to whether sites will come forward as anticipated.

Build rates and lead in times

3.5.2 Built out rates and lead in times have been determined by each district for their own sites, based on information available and past experience.

3.6 Stage 5: Final evidence base

3.6.1 Although the PPG no longer sets out standard outputs that should be produced from the land availability assessment, the following outputs were previously identified to ensure consistency, accessibility and transparency:

- a list of all sites or broad locations considered, cross-referenced to their locations on maps;
- an assessment of each site or broad location, in terms of its suitability for development, availability and achievability including whether the site/broad location is viable) to determine whether a site is realistically expected to be developed and when;
- contain more detail for those sites which are considered to be realistic candidates for development, where others have been discounted for clearly evidenced and justified reasons;
- the potential type and quantity of development that could be delivered on each site/broad location, including a reasonable estimate of build out rates, setting out how any barriers to delivery could be overcome and when;
- an indicative trajectory of anticipated development and consideration of associated risks.

3.6.2 The assessment should also be made publicly available in an accessible form.

3.6.3 The baseline supply of sites is published on MappingGM (see https://mappinggm.org.uk/).

Part B – Housing Supply

The baseline housing land supply is broken down into a number of categories, as set out in the following sections of this report:

4) Sites under construction;

5) Sites with planning permission;

6) Potential supply – other district SHLAA sites; and

7) Other Allowances.

4) Sites under construction

4.1.1 This section includes sites that have received planning permission and a material start has been made on the implementation of that planning permission. Within this category there will be sites at various stages in the construction process from sites that are nearing completion to sites that are just commencing ground works.

4.1.2 This information provided is based on the position at 1 April 2018 and some of these sites may have been completed since then or additional sites may have commenced. These changes will be picked up in any future updates of this report.

Table 3: Sites under construction

District	Number of sites[1]	Site Area	Dwellings Available and Under Construction 2018-2037			Post 2037
			Houses	Apartments	Total	
Bolton	134	108.1	1,097	108.1	2,223	0
Bury	73	37.6	424	37.6	745	0
Manchester	107	124.9	1,142	124.9	8,621	0
Oldham	144	69.7	820	69.7	1,123	0
Rochdale	56	92.0	1,675	92.0	1,767	0
Salford	95	83.0	936	83.0	12,440	0
Stockport	79	145.6	1,416	145.6	2,174	0
Tameside	91	41.0	669	41.0	1,059	0
Trafford	112	25.2	419	25.2	2,289	0
Wigan	74	242.1	4,508	242.1	4,757	0
GM	965	969.2	13,106	969.2	37,198	0

5) Sites with planning permission

5.1.1 This section includes those sites that had an extant planning permission for residential development, including outline, full permission and permission in principle, at 1 April 2018. Construction may have commenced on some of these sites since then and any change in status will be taken into account in any future updates of this report.

Table 4: Sites with planning permission

District	Number of sites	Site Area	Capacity 2018-2037			Post-2037
			Houses	Apartments	Total	
Bolton	228	152.7	3,375	857	4,232	0
Bury	95	24.1	386	165	551	0
Manchester	344	79.8	1,558	10,123	11,681	0
Oldham	213	79.8	1,312	594	1,906	0
Rochdale	153	82.4	1,952	469	2,421	0
Salford	103	97.9	999	6,841	7,840	0
Stockport	218	25.3	381	723	1,104	0
Tameside	110	36.4	1,249	254	1,503	0
Trafford	163	67.7	867	1,721	2,588	0
Wigan	199	222.6	5,358	509	5,867	189
GM	1,826	868.8	17,437	22,256	39,693	189

[1] Number of sites and site area includes sites that are anticipated to deliver housing entirely post-2037.

6) Potential supply – other district SHLAA sites

6.1.1 In addition to sites under construction or with planning permission, SHLAAs include other sites that are constitute part of the housing supply, for example outstanding local plan allocations, sites where planning permission has lapsed, sites identified through site suggestions exercises, masterplanning work and officer knowledge. Table 5 summarises this aspect of the housing land supply.

Table 5: Potential Supply

District	Number of sites	Site Area (hectares)	Capacity 2018-2037			Post-2037
			Houses	Apartments	Total	
Bolton	139	123.0	4,686	1,176	5,862	0
Bury	88	99.6	2,159	961	3,120	0
Manchester	189	467.7	5,899	30,225	36,124	7,778
Oldham	173	169.9	5,279	2,455	7,734	75
Rochdale	131	201.0	4,984	977	5,961	0
Salford	171	223.6	4,276	11,269	15,545	0
Stockport	143	263.6	2,093	5,633	7,726	200
Tameside	119	89.7	2,497	2,079	4,576	0
Trafford	102	670.0	1,958	6,092	8,050	0
Wigan	177	481.7	8,790	644	9,434	250
GM	1,432	2,789.7	42,621	61,511	104,132	8,303

7) Other Allowances

7.1 Windfall Allowance

7.1.1 Windfall sites are defined in the NPPF as "*Sites not specifically identified in the development plan.*"

7.1.2 For the purpose of this report, windfall sites are considered to be sites that are not specifically identified as part of baseline supply or potential GMSF allocations.

7.1.3 The NPPF and PPG make reference to an allowance for windfalls for housing (where justified). Paragraph 70 of the NPPF states that:

"Where an allowance is to be made for windfall sites as part of anticipated supply, there should be compelling evidence that they will provide a reliable source of supply. Any allowance should be realistic having regard to the strategic housing land availability assessment, historic windfall delivery rates and expected future trends".

7.1.4 For the purposes of this report, although individual district SHLAAs may currently take differing approaches, analysis has been taken to establish a common approach across all districts.

7.2 Small sites allowance

7.2.1 Small sites that are have not currently or previously had planning permission are particularly difficult for Local Authorities to identify as part of the preparation of their SHLAAs, yet such sites will continue to come forward over the plan period. Some districts also apply a site size threshold to their SHLAA site identification process, with such sites accounted for through an overall small sites allowance. The identified housing land supply will therefore undercount the contribution of small sites unless a separate allowance is made.

7.2.2 There is no nationally set methodology for establishing what an appropriate small sites windfall allowance would be. However, a common approach is based on analysis of past trends. There is also no set definition of what would constitute a 'small site'. The Greater Manchester districts apply different approaches to whether small sites are included within their SHLAAs, and as a result different thresholds have been applied to the calculation of past trends to reflect each districts SHLAA methodology.

7.2.3 Past trends are available for all districts for 2013-2018 as set out in Table 6.

Table 6: Past completions on small sites, 2013-2018

District	2013/2014		2014/2015		2015/2016		2016/2017		2017/18		Total 2013-2018	
	Gross	Net	Gross	Net	Gross	Net	Gross	Net	Gross	Net	Gross	Net
Bolton	93	-	274	-	283	-	208	-	237	-	1,095	N/A
Bury	34	34	18	18	20	20	32	15	39	31	143	118
Manchester	313	-	248	-	175	-	197	-	158	158	1,091	N/A
Oldham	32	30	13	13	28	24	23	23	77	77	173	167
Rochdale	21	-	16	-	4	-	8	-	46		95	N/A
Salford	76	63	110	90	214	193	218	209	237	219	855	774
Stockport	68	51	86	69	72	59	98	72	27	23	351	274
Tameside	93	73	65	59	75	56	51	46	67	57	351	291
Trafford	22	14	55	34	34	23	47	42	62	57	220	175
Wigan	148	137	102	97	70	69	63	61	53	49	436	413
Greater Manchester	900		987		975		945		1,003		4,810	

7.2.4 The thresholds used for the calculation of past trends and the small sites allowance are set out in Table 7. Districts have provided data based on what is appropriate and available for their area.

Table 7: Small site thresholds

District	Threshold
Bolton	<0.25ha
Bury	<5
Manchester	<10
Oldham	<5
Rochdale	<5
Salford	<0.1 and <0.25
Stockport	<5
Tameside	<5
Trafford	<5
Wigan	<5

7.2.5 Gross figures for past trends are available for all districts, but only seven districts are able to provide net figures. Net figures have been used where available. The use of net figures builds in an allowance for small site clearances and changes of use from housing to other uses.

7.2.6 In the case of Bolton, Manchester and Rochdale it is appropriate to use gross figures for windfalls because separate deductions will be made to account for the fact that their baseline supply evidence is only available as gross rather than net data (as set out in 7.3 below). These deductions account for past trends in clearance, demolitions and change of use from housing to other uses, some of which will have been on windfall sites.

7.2.7 This information allows the total delivery on small sites over the period 2013-2018 to be calculated for each district, and hence a per annum average.

Table 8: Small sites – annual past trend

	Total 2013-2018		Annual windfalls past trend 2013-2018
	Gross	Net	
Bolton	1,095	N/A	219
Bury	143	118	24
Manchester	1,091	N/A	218
Oldham	173	167	33
Rochdale	95	N/A	19
Salford	855	774	155
Stockport	351	274	55
Tameside	351	291	58
Trafford	220	175	35
Wigan	436	413	81
Greater Manchester	4,810		897

7.2.8 The small sites allowance will be applied from 2023/24 for the remainder of the plan period (i.e. 2023-2037).

7.2.9 Many small sites that are likely to come forward earlier will already have planning permission and so will be in the baseline supply of specific sites. Within their own SHLAAs some districts apply a small sites allowance from an earlier point in the plan period. This is on the basis that planning applications are valid for three years and therefore permissions on small sites granted in the two years after the base date of the identified supply (i.e. between 1 April 2018 and 31 March 2020) are likely to come forward in addition to those currently within the baseline supply by 31 March 2023.

7.2.10 However, for the purposes of the GMSF the decision has been taken to apply the windfalls from 2023/24 as this is a more practical approach based on the data available for all GM districts.

7.2.11 The baseline supply of specific sites includes some small sites that will be delivered for the period 2023 onwards and are below the upper threshold used by districts to calculate their small site past trends, and so these need to be deducted from the projection of past trends to avoid double counting. Table 9 shows the results of this methodology.

Table 9: Small sites allowance calculation

District	Windfalls per annum 2013-2018	Past trend applied to 2023-2037 (1)	Baseline supply on small sites for 2023-2037 (2)	Applied past trend minus baseline supply (1 minus 2)	Annual allowance
Bolton	219	3,066	0	3,066	219
Bury	24	330	52	278	20
Manchester	218	3,055	3	3,052	218
Oldham	33	468	0	468	33
Rochdale	19	266	28	238	17
Salford	155	2,167	497	1,670	119
Stockport	55	767	0	767	55
Tameside	58	815	15	800	57
Trafford	35	490	54	436	31
Wigan	81	1,140	0	1,140	81
GM	897	12,564	649	11,915	850

7.2.12 As set in in Table 9 a small sites windfall allowance of **850 dwellings per annum** will be added to the identified baseline land supply from 2023 to 2037. The annual district allowances have been rounded to the nearest whole dwelling, and as a result this equates to a total of **11,900 dwellings**.

Table 10: Small sites windfall allowance

District	Annual allowance 2023-2037	Small sites allowance 2023-2037
Bolton	219	3,066
Bury	20	280
Manchester	218	3,052
Oldham	33	462
Rochdale	17	238
Salford	119	1,666
Stockport	55	770
Tameside	57	798
Trafford	31	434
Wigan	81	1,134
GM	850	11,900

7.3 Clearances and net/gross adjustment

7.3.1 With the exception of Bolton, Manchester and Rochdale, all districts SHLAAs are based on net completions on identified sites. This means that in most cases there is no need to make a separate allowance for demolition, site clearance or change of use to non-housing uses, as these are already factored in to the baseline supply. Bolton, Manchester and Rochdale record information on gross housing supply and deal with the issue of demolitions / losses separately.

Bolton

7.3.2 In Bolton's case the supply is presented as a gross supply with an allowance of 40 dwelling per annum assumed in terms of demolitions. Although demolitions / losses between 2008 and 2017 have averaged at around 65 per annum this has included some larger 'one off' clearances. Since there are currently no major redevelopment schemes proposed that would result in a large number of demolitions, it is considered that the 40 dwelling per annum allowance is a robust assessment going forward. If this is applied over the GMSF plan period this equates to **760 dwellings** (2018-2037 = 19 years x 40) lost over the period that would need to be replaced through the identified supply.

Manchester

7.3.3 Manchester has historically seen relatively large numbers of demolitions through various regeneration initiatives, however these high levels of clearances are not expected in the future and the level of demolitions has dropped sharply for the last three years that information is available, as set out in Table 11:

Table 11: Manchester demolitions

Year	All demolitions	Estimated demolitions from redevelopment clearance schemes	Non clearance scheme demolitions
2013/14	383	290	93
2014/15	551	475	76
2015/16	64	0	64
2016/17	72	52	20
2017/18	46	0	46
Average			60

7.3.4 There is no evidence to suggest that there will be a substantial change in average figures over the plan period.

7.3.5 Analysis of Council Tax Points within Manchester's SHLAA sites suggests there will be approximately 515 planned demolitions over and above the non-clearance schemes average of previous years (estimated at 290 in 2023-2028 and 225 in 2028-2033).

7.3.6 On the basis of the above information, the following demolition allowance will be made for Manchester:

Table 12: Manchester demolition allowance

	Demolition allowance
Redevelopment scheme	515
Annual figures	
Average per year 60 x 19 (2018/19 to 2036/37)	1,140
Total over plan period	1,655

Rochdale

7.3.7 Similar to Manchester, Rochdale has historically seen relatively high levels of clearance again linked to regeneration initiatives such as Housing Market Renewal. In recent years, as the capacity to undertake regeneration has reduced, this had fallen significantly. However, in more recent years, there have been sporadic increases in the number of demolitions recorded which has been due to the activity of Rochdale Boroughwide Housing (RBH) in clearing some of its lower demand stock. Table 13 shows demolitions since 2011.

Table 13: Rochdale demolitions

Year	Demolitions
2011/12	13
2012/13	12
2013/14	5
2014/15	1
2015/16	94
2016/17	170
2017/18	2

7.3.8 Since there are significant fluctuations based around the clearance on specific sites, an approach has been taken in Rochdale to make an allowance going forward which takes account of planned clearance along with a smaller allowance of 20 dwellings per annum to cover general demolitions. The most recent information from RBH shows the clearance of around 750 dwellings at a rate of around 75 dwellings per annum over the next 10 years (2018-2028). If the general assumption of 20 per annum was added onto this it would give a total over the plan period of **1,130** (750 + 19x20).

7.4 Summary of other allowances

7.4.1 The allowances for each district are set out in Table 14 with trajectory figures for when the windfalls are expected to come forward presented in Table 15.

Table 14: Other allowances

District	Total windfall allowance 2018-2037	Allowance for losses	Total 2018-2037
Bolton	3,066	-760	2,306
Bury	280	0	280
Manchester	3,052	-1,655	1,397
Oldham	462	-95	367
Rochdale	238	-1,130	-892
Salford	1,666	0	1,666
Stockport	770	0	770
Tameside	798	0	798
Trafford	434	0	434
Wigan	1,134	0	1,134
GM	11,900	-3,640	8,260

Table 15: Other allowances trajectory

District	2018-2023	2023-2028	2028-2033	2033-2037	Total 2018-2037
Bolton	-200	895 (1,095-200)	895 (1,095-200)	716 (876-160)	2,306
Bury	0	100	100	80	280
Manchester	-300	500 (1,090-590)	565 (1,090-525)	632 (872-240)	1,397
Oldham	-25	140 (165-25)	140 (165-25)	112 (132-20)	367
Rochdale	-475	-390 (85-475)	-15 (85-100)	-12 (68-80)	-892
Salford	0	595	595	476	1,666
Stockport	0	275	275	220	770
Tameside	0	285	285	228	798
Trafford	0	155	155	124	434
Wigan	0	405	405	324	1,134
GM	-1,000	2,960	3,400	2,900	8,260

7.4.2 Consideration has been given to the application of other windfall allowances for large employment sites, town centres and one public estate. However, the districts have agreed that no other allowances will be made at this time. Further consideration of these types of windfalls is presented in Section 8).

8) Risk assessment

8.1.1 The NPPF seeks to ensure that the planning system delivers a flexible, responsive supply of housing land to meet housing needs. It is considered that this HLSS represents a realistic position in relation to the current supply of sites across Greater Manchester. However, as stated previously, inclusion in a SHLAA does not automatically imply that the site will be made available for housing or guarantee that planning permission will be granted. Through the SHLAA process the districts have identified possible housing sites and assessed the overall housing potential but ultimately decisions on which sites would be brought forward for development will be determined through either the local plan process or the planning application process in conjunction with the housing market.

8.1.2 There is also significant potential for additional sites to come forward for housing that have not specifically been included in the supply and go beyond the small sites windfall allowances made in Section 7) above. It is considered that such sites will provide a degree of flexibility to replace any sites that should drop out of the supply due to unforeseen circumstances.

8.2 Large windfalls

8.2.1 Within their SHLAAs some districts make an allowance for large sites to come forward as windfalls, particularly on employment sites. Many of the GM districts have a significant stock of employment land as a legacy of their industrial past that is still in current use but may not be suitable or viable for employment use should the sites be vacated by the current occupiers. For some districts such sites have been a regular source of windfall development historically, and are likely to continue to come forward over the GMSF plan period.

8.2.2 As these large employment sites are currently in active use and owners have not identified an intention to vacate the site, and only a proportion of sites will come forward for housing, it would not be reasonable to identify such sites within the housing land supply. However, given previous trends and the age, condition, location and suitability of business premises within some areas, the loss of further employment sites to housing is inevitable. Given that the GMSF will allocate new employment sites in locations that are more attractive to the market, this may result in the relocation of existing businesses thereby freeing up existing employment sites for alternative uses, including housing development.

8.2.3 For example, in Wigan's case a specific windfall allowance is made within their SHLAA for such sites, as these sites have historically been regular source of windfall development due principally to the Borough's significant stock of employment land as a legacy of its industrial past which is no longer needed for, or attractive to the employment market. Where possible such sites are identified in Wigan's SHLAA, but only where it can be demonstrated that they are no longer suitable or viable for continued employment uses, or where planning permission has been granted for housing. Their assessment does not identify employment sites which are in active use and where the owner has not made it clear that they intend to vacate the site as it would not be reasonable to conclude that these sites are currently available, and their inclusion could disadvantage existing occupiers. However, given previous trends and the age, condition, location and suitability of many business premises within the Borough, the loss of further employment sites to housing is considered to be inevitable.

8.2.4 No specific windfall allowance is currently proposed for such sites as part of the GMSF land supply due to the inherent difficulties in calculating what an appropriate allowance would be for all districts due to lack of consistent and comparable data on past trends, however there is clear evidence to demonstrate that such sites have come forward in the past and no reason to believe that this will not continue to be the case.

8.3 Town centres

8.3.1 The town centres will be a key component of the overall strategy in the GMSF, and increasing the number of people living within them is a primary objective in order to increase footfall, add vitality, and support shops and services.

8.3.2 Where possible, town centre sites have been identified within SHLAAs and included as part of the baseline housing land supply. However, in many of Greater Manchester's town centres, the town centre housing market is yet to be properly established, and potential town centre sites may be currently in use, and as such it is difficult to assess the full deliverable housing potential within these areas.

8.3.3 The town centre challenge initiative launched by Mayor Andy Burnham and Greater Manchester Combined Authority seeks to regenerate town centres across Greater Manchester by identifying the ambition for and barriers to delivering change within town centres. It supports the delivery of higher density mixed and affordable housing, creating viable housing markets. Farnworth, Leigh, Prestwich, Stalybridge, Stretford, Swinton and Stockport have all been nominated for the town centre challenge, and if successful the approach is likely to be extended further to other town centres across Greater Manchester.

8.4 One public estate

8.4.1 The Government has placed an emphasis on utilising public land for housing, and work is ongoing across Greater Manchester to identify the potential for rationalisation of the public estate and the opportunities that this could provide for housing development. The One Public Estate programme is run jointly by the Local Government Association and the

Cabinet Office and has provided funding to GMCA to support unlocking development by rationalising public sector land and buildings.

8.4.2 The GMCA One Public Estate approach has been piloted in Stockport and is being extended to other districts. It is likely to have the potential to identify additional opportunities for development that are not currently part of the baseline supply but could contribute to housing delivery over the plan period and provide an additional degree of flexibility if some identified sites fail to deliver as anticipated.

8.5 Greater Manchester funding

8.5.1 In addition to nationally available funding for housing (for example through the Home Building Fund, Barclays and Homes England Housing Delivery Fund, the Government's Housing Infrastructure Fund, Land Assembly Fund and Small Sites Fund), specific funding is available for housing delivery within Greater Manchester.

Greater Manchester Housing Investment Loan Fund

8.5.2 The Greater Manchester Investment Fund is a series of investment funds aimed at encouraging business growth and investment in property and infrastructure. It includes the Greater Manchester Housing Investment Loan Fund which has to date committed £421m of funding to residential development across Greater Manchester, supporting the building of over 5,500 homes, with over 1,000 units completed to date. The fund remains open for business utilising recycled funds and will continue to invest in more homes across Greater Manchester. The fund offers loans to developers to kickstart housing projects that would otherwise be difficult to fund from elsewhere.

Greater Manchester Housing Package

8.5.3 In March 2018 an ambitious Housing Package between the GMCA and Government was announced. It sets out aims to better coordinate the planning, decision-making and delivery of housing across the city region. It will deliver significant and sustained investment that maximises Greater Manchester's growth potential and brings forward a pipeline of housing development across the city region.

8.5.4 The deal with Government potentially provides Greater Manchester with:

- A Land Fund of up to £50m capital
- Up to £8m of capacity funding to support delivery
- Four Housing Infrastructure Fund (Forward Fund) bids through to 'co-development' stage
- More flexibility to recycle the Housing Investment Loan Fund, allowing us to deliver more homes
- Commitment to joint working with GM on affordable housing delivery and the Land & Infrastructure Commission

8.5.5 The Housing Package gives Greater Manchester more local control on funding to remediate brownfield sites and bring them forward for housing, more capacity to help districts do the work behind the scenes to make that happen, and a Land & Infrastructure Commission to coordinate that and to challenge Government to do more to make public land available for housing. Negotiations are ongoing to agree the final details of the Package with Government.

8.6 Housing delivery test - Action plans

8.6.1 The Housing Delivery Test measures net additional dwellings provided in a local authority area against the homes required. Results will be published annually by MHCLG.

8.6.2 Where the Housing Delivery Test indicates that delivery has fallen below 95% of their housing requirement over the previous three years, the NPPF requires local planning authorities to prepare an action plan to assess the causes of under delivery and identify actions to increase delivery in future years.

8.6.3 The preparation and implementation of action plans in the Greater Manchester authorities where delivery has fallen below 95% of their requirement will help to address the risks of sites identified within the GM Housing Land Supply not coming forward as anticipated.

9) GM Housing Land Supply Summary

9.1.1 Table 16 summarises the Greater Manchester housing land supply position as at 1 April 2018, based on the information presented in this report.

Table 16: Housing Supply Summary

District	Remaining Units available on Sites Under Construction	Sites with Extant Planning Perm / PiP Not Started	Other district SHLAA sites	Small sites windfall allowance	Allowance for losses	**Total 2018-2037**	Post-2037
Bolton	2,223	4,232	5,862	3,066	-760	**14,623**	0
Bury	745	551	3,120	280	0	**4,696**	0
Manchester	8,621	11,681	36,124	3,052	-1,655	**57,823**	7,778
Oldham	1,123	1,906	7,734	462	-95	**11,130**	75
Rochdale	1,767	2,421	5,961	238	-1,130	**9,257**	0
Salford	12,440	7,840	15,545	1,666	0	**37,491**	0
Stockport	2,174	1,104	7,726	770	0	**11,774**	200
Tameside	1,059	1,503	4,576	798	0	**7,936**	0
Trafford	2,289	2,588	8,050	434	0	**13,361**	0
Wigan	4,757	5,867	9,434	1,134	0	**21,192**	439
GM	37,198	39,693	104,132	11,900	-3,640	**189,283**	8,492

Part C – Analysis of findings

10) Brownfield / Greenfield

10.1.1 Table 17 identifies how much of the identified baseline supply (excluding additional sites and other allowances) is on brownfield, greenfield or mixed sites.

Table 17: Housing supply by land type (2018-2037)[2]

District	Site count			Site area			Capacity 2018-2037		
	Brownfield	Greenfield	Mixed	B'field	G'field	Mixed	B'field	G'field	Mixed
Bolton	362	139	0	272.1	111.6	0	9,628	2,689	0
Bury	175	71	10	106.4	38.5	16.4	3,336	668	412
Manchester	520	95	25	439.2	60.4	172.8	45,309	1,737	9,380
Oldham	399	86	45	180.9	44.7	93.9	7,585	1,174	2,004
Rochdale	232	90	18	177.5	170.5	27.4	6,463	2,935	751
Salford	279	62	28	235.0	108.1	61.4	31,140	1,916	2,769
Stockport	311	91	38	110.5	27.4	296.7	5,180	719	5,105
Tameside	219	70	31	94.4	28.7	44.0	5,028	800	1,310
Trafford	324	42	11	659.2	54.4	49.3	8,377	3,653	897
Wigan	353	94	3	549.1	393.5	3.9	12,223	7,725	110
GM	3,174	840	209	2,824.3	1,037.7	765.7	134,269	24,016	22,738

10.1.2 Overall 75% of sites, 61% of site area and 74% of the baseline housing land supply is on brownfield sites. As may be expected given the built up nature of the urban core, Salford has the highest proportion of its supply on brownfield sites, followed by Manchester. Stockport has the lowest proportion of its supply on brownfield sites (due to a high proportion on mixed sites, including Stockport town centre living area), followed by Wigan.

[2] Sites that are anticipated to deliver housing entirely post-2037 are included in the site count and site area but are excluded from the capacity figures.

11) House type

11.1.1 Table 18 splits the identified supply by houses and apartments, with sites split by those with planning permission and those without, where there will be more uncertainty regarding house types to be provided. For sites without full planning permission the house types are indicative based on local knowledge and what is most likely to come forward on the sites. The table excludes windfalls and allowances for losses.

Table 18: Identified housing land supply by house type

District	Houses		Apartments		Total 2018-2037
	Count	Percentage	Count	Percentage	
Bolton	9,158	74.4%	3,159	25.6%	12,317
Bury	2,969	67.2%	1,447	32.8%	4,416
Manchester	8,599	15.2%	47,827	84.8%	56,426
Oldham	7,411	68.9%	3,352	31.1%	10,763
Rochdale	8,611	84.8%	1,538	15.2%	10,149
Salford	6,211	17.3%	29,614	82.7%	35,825
Stockport	3,890	35.4%	7,114	64.6%	11,004
Tameside	4,415	61.9%	2,723	38.1%	7,138
Trafford	3,244	25.1%	9,683	74.9%	12,927
Wigan	18,656	93.0%	1,402	7.0%	20,058
GM	73,164	40.4%	107,859	59.6%	181,023

11.1.2 There is a clear difference between the house / apartment split, with Manchester, Salford and Trafford identifying over 70% of their supply as apartments, and Wigan only 7% apartments. Across Greater Manchester as a whole, 59.6% of supply is apartments and 40.4% is houses, reflective of the higher levels of supply in the urban core of Manchester and Salford.

12) Housing trajectory

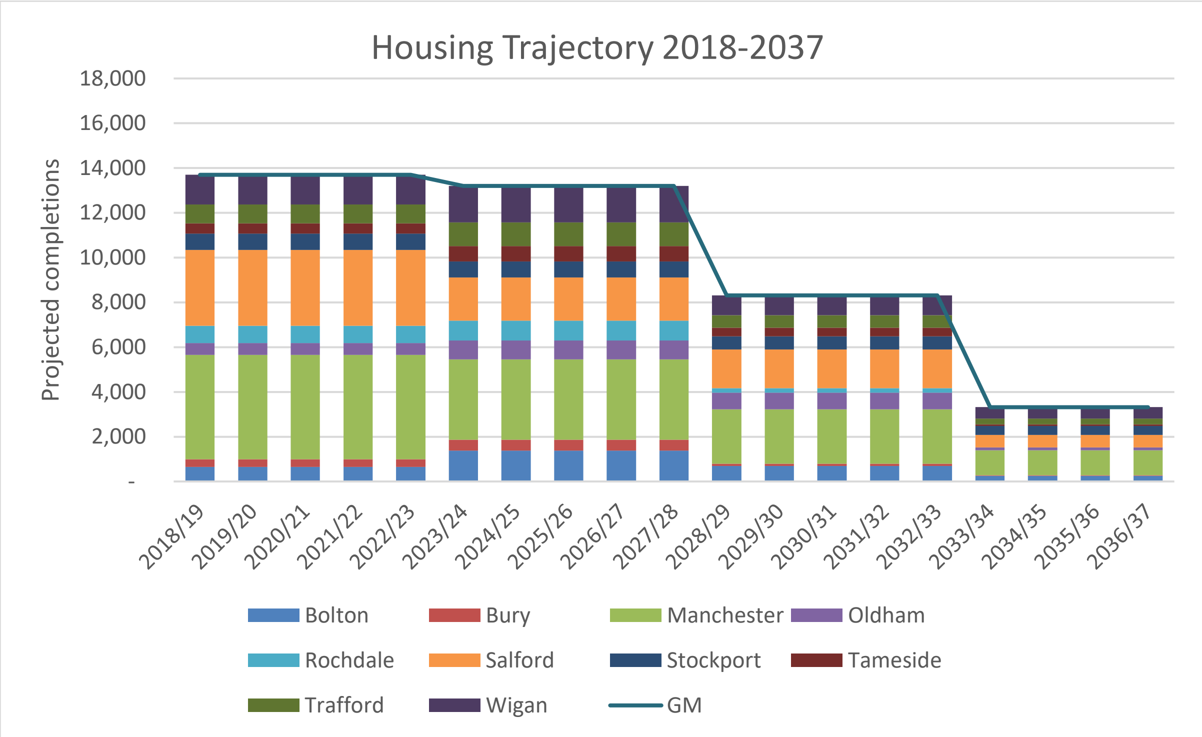
12.1.1 The PPG states that once the sites have been assessed the development potential of all sites can be collected to produce an indicative trajectory. This should set out how much housing can be provided and at what point in the future. Table 19 sets out this detail based on 2018-2023 (5 years), 2023-2028 (5 years), 2028-2033 (5 years) and 2033-2037 (4 years).

Table 19: GM Housing Land Supply – trajectory 2018-2037

Supply type	District	2018-2023	2023-2028	2028-2033	2033-2037	**Total 2018-2037**
2018 baseline supply	Bolton	3,457	5,986	2,574	300	**12,317**
	Bury	1,692	2,311	388	25	**4,416**
	Manchester	23,579	17,441	11,594	3,812	**56,426**
	Oldham	2,725	4,089	3,554	395	**10,763**
	Rochdale	4,290	4,822	1,037	0	**10,149**
	Salford	16,931	9,091	8,048	1,755	**35,825**
	Stockport	3,649	3,267	2,675	1,413	**11,004**
	Tameside	2,312	3,175	1,603	48	**7,138**
	Trafford	4,239	5,126	2,649	913	**12,927**
	Wigan	6,610	7,730	4,012	1,706	**20,058**
	GM	69,484	63,038	38,134	10,367	**181,023**
Other allowances	Bolton	-200	895	895	716	**2,306**
	Bury	0	100	100	80	**280**
	Manchester	-300	500	565	632	**1,397**
	Oldham	-25	140	140	112	**367**
	Rochdale	-475	-390	-15	-12	**-892**
	Salford	0	595	595	476	**1,666**
	Stockport	0	275	275	220	**770**
	Tameside	0	285	285	228	**798**
	Trafford	0	155	155	124	**434**
	Wigan	0	405	405	324	**1,134**
	GM	-1,000	2,960	3,400	2,900	**8,260**
TOTAL	Bolton	3,257	6,881	3,469	1,016	**14,623**
	Bury	1,692	2,411	488	105	**4,696**

	Manchester	23,279	17,941	12,159	4,444	**57,823**
	Oldham	2,700	4,229	3,694	507	**11,130**
	Rochdale	3,815	4,432	1,022	-12	**9,257**
	Salford	16,931	9,686	8,643	2,231	**37,491**
	Stockport	3,649	3,542	2,950	1,633	**11,774**
	Tameside	2,312	3,460	1,888	276	**7,936**
	Trafford	4,239	5,281	2,804	1,037	**13,361**
	Wigan	6,610	8,135	4,417	2,030	**21,192**
	GM	68,484	65,998	41,534	13,267	**189,283**

Figure 3: Housing Trajectory



13) Conclusion

13.1.1 This summary document provides a snapshot of both the committed and potential housing supply across Greater Manchester up to 2037 as of 1 April 2018. The results will be used to inform work on the GMSF. In particular, it will play an important role in providing robust and credible evidence to support the proposed housing targets.

13.1.2 Certain assumptions have been made within each of the Greater Manchester district SHLAAs, and stakeholders are invited to submit further information to the relevant district in relation to existing SHLAA sites or proposed additions to the SHLAA for consideration in future updates.