GM SPATIAL FRAMEWORK

GREATER MANCHESTER SPATIAL FRAMEWORK

Strategic Options Consultation

November 2015

BOLTON	MANCHESTER	ROCHDALE	STOCKPORT	TRAFFORD
BURY	OLDHAM	SALFORD	TAMESIDE	WIGAN

1 Introduction

This Consultation

1.1 We undertook an early consultation on initial evidence last November and we are now seeking further views on a draft Vision, Strategic Objectives and Strategic Growth Options. This builds on the consultation we undertook last year and responds to both comments received and new evidence which has become available.

1.2 We want to share our methodology widely and generate views from the wide range of stakeholders who share our vision for a better, more productive and successful Greater Manchester.

1.3 We are seeking your views on this document and welcome your comments on our vision and strategic objectives as well as your preferred growth option. This document is supported by 4 other background papers and a report of the initial integrated assessment of GMSF growth options which helps to identify where there are differences in how each option responds to the social, economic and environmental objectives in the IA framework [(1)].

1.4 Comments should ideally be submitted online via our GMSF consultation portal at https://gmsf-consult.objective.co.uk . Alternatively comments can be emailed to gmsf@agma.gov.uk or sent to: GM Integrated Support Team, PO Box 532, Town Hall, Manchester M60 2LA. Comments must be received no later than Monday 11th January 2016.

1.5 Alongside the consultation on the Strategic Options we are also carrying out a Call for Sites. If you have a site you would like to be considered for the GMSF please enter details on our call for sites map at http://mappinggm.org.uk/call-for-sites/development-sites.htm. Alternatively sites can be submitted by email to gmsfcallforsites@agma.gov.uk or sent to GM Integrated Support Team, PO Box 532, Town Hall, Manchester M60 2LA. Site submissions to be received no later than Monday 11th January 2016.

1.6 Background information about the GMSF is available from https://www.greatermanchester-ca.gov.uk/gmsf Alternatively, please contact David Hodcroft on 0161 237 4636 or email gmsf@agma.gov.uk.

Our Ambition

1.7 Our ambition is for Greater Manchester to become a financially self-sustaining city, sitting at the heart of the Northern Powerhouse with the size, the assets, the skilled population and political and economic influence to rival any global city. We

1 Available from https://gmsf-consult.objective.co.uk/portal

are one of a few economic geographies capable of becoming a national engine of growth for the North and the UK as a whole, and in doing so, become a net contributor to the economy.

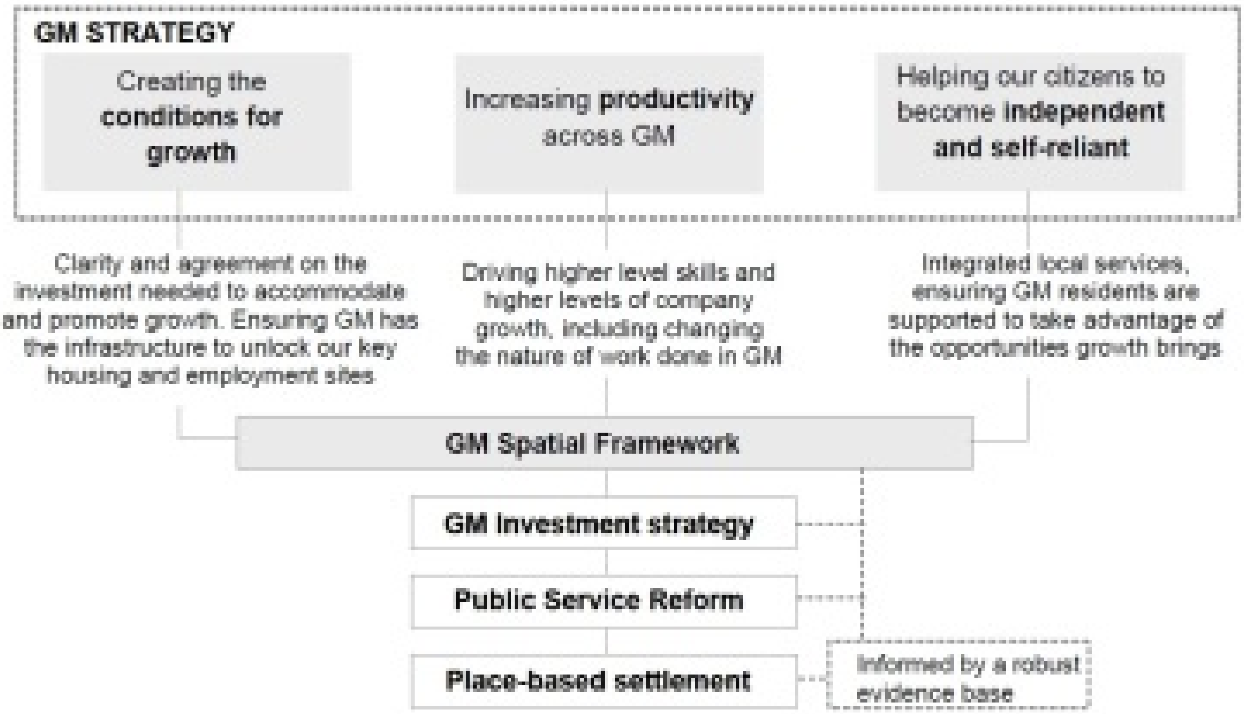
1.8 Greater Manchester's recent devolution deals with Government are significant steps along our ''roadmap'' towards a place-based partnership that provides the tools and levers required to discharge our place-shaping role to create high quality places that attract and retain more productive people and businesses and to reform the way that public services are delivered to improve outcomes for our people. Devolution of health and social care responsibilities to Greater Manchester will enable us to address the fundamental challenge of ensuring that the system becomes financially sustainable over time, and that improved health and well-being outcomes support and enhance Greater Manchester's objective of reducing worklessness and supporting people back into employment. Through reform of the GM skills system we are also working to ensure that our skills offer is aligned to the needs of employers and residents

1.9 However we need to do more to truly transform the way that investment in growth and the reform of public services are delivered. We need new funding mechanisms to fund investment in growth, infrastructure and land remediation. We need further employment and skills reforms to enable the creation of a truly integrated employment and skills landscape across Greater Manchester. And we need greater flexibility to better align all public funding to secure the achievement of our strategic priorities- an over-emphasis on national delivery models mean that the outcomes required at a local level are not being delivered.

1.10 We are seeking to fundamentally tackle this issue, by focusing on game-changing investment in growth and by taking demand out of the system through better, joined-up public services to ensure that services are delivered in a way that encourages Greater Manchester residents to be self-sufficient and by providing businesses with the support they need to grow, innovate and diversify.

Our Strategic Approach

Figure 1



1.11 The Greater Manchester Strategy has three primary priorities supported by a clear set of strategies. The Greater Manchester Spatial Framework (GMSF) has a pivotal role in supporting growth and reform but it is not the sole lever at our disposal. We are developing a range of strategies and actions to support our work and the GMSF needs to be viewed within the context of these.

1.12 Recognising that Greater Manchester has a key role to play in driving the success of the Northern Powerhouse we commissioned Oxford Economics to produce an Accelerated Growth Scenario, reflecting the ambition of Government as set out in the Long term Plan for the North West. This is a statement of our ambition – and we have developed our strategic options around it.

1.13 Equally important is the work we are undertaking through our 'Deep Dives' - a wide ranging analysis of the economic issues and opportunities across Greater Manchester at a greater degree of granularity than we ever done before. This will give us a detailed understanding of the spatial implications of, and barriers to, growth at a local level through looking at supply side issues (labour force, skills, health) as well as demand side factors (land/sites, accessibility/connectivity). The outcomes will be independently verified and used to inform a range of growth and reform interventions and will be essential as we develop our spatial strategy further.

1.14 We are developing complementary strategies (for example the Transport Strategy 2040, the Residential Growth Strategy and the Climate Change Implementation Plan) all of which will support the delivery of Greater Manchester's objectives.

1.15 Critically our strategic approach is underpinned by an investment strategy which will enable us to improve productivity by investing in our people, infrastructure and assets to create the conditions for growth, and in key growth sectors to transform our sector mix and the type of jobs available. Our investment strategy will provide a separate but complementary analysis which will focus on the delivery of the GMSF, informed by the 'Deep Dives' and agreed with each local authority.

1.16 Our past success has been underpinned by an objective and clear understanding of complex issues provided by our strong evidential base. Given the scale and inter-dependencies of the challenges ahead we need to continue to develop evidence based solutions as we move forward.

The Role of the Greater Manchester Spatial Framework

1.17 The GMSF will enable us to take an informed, integrated approach to spatial planning across the conurbation, based on a clear understanding of the role of our places and the connections between them. It will provide a framework within which to manage the supply of land across the conurbation to deliver growth over a 20 year timeframe, ensuring that Greater Manchester is able to meet current and emerging occupier demand to support a market-facing strategy for housing and employment growth.

1.18 The GMSF is pivotal to delivering our ambition for a better Greater Manchester, helping to ensure that we grow in a sustainable way which enhances the quality of our places and makes Greater Manchester a more attractive place to live, work visit and invest. Our aim is to achieve a step change in the rate and quality of development. This will inevitably lead to difficult decisions in relation to land supply, and investment and will have impacts upon our social infrastructure which will need to be addressed.

The Scope of the GMSF

1.19 The GMSF will set out the scale and distribution of housing and employment growth across the conurbation for the next 20 years. It will identify strategic land allocations for housing and employment and also key infrastructure requirements to support this growth. It will provide a strategic environmental policy framework to ensure that growth is accommodated in a sustainable way and that Greater Manchester will be resilient to existing and future climate pressures. The GMSF will also set out strategic development management policies where it is important for there to be a consistent Greater Manchester approach.

1.20 It will be necessary to translate the implications of the GMSF in more detail at the local level to support delivery. It is not sensible to prescribe how this should be undertaken as the situation will be different depending of the scale and location of development and the particular circumstances which prevail locally. There will still be a need for local plans and neighbourhood plans/master planning at the very local level.

Question 1

Have we identified the scope of the GMSF appropriately?

If we have not, what do you think should be included and / or excluded?

Developing our Evidence Base

1.21 The Framework will build on our robust analysis of projected employment growth, including a sectoral analysis of our key growth sectors, and an assessment of demographic change and the housing requirements arising from such change. This current consultation brings this analysis together to ensure that we have a clear perspective of land requirements, supply and delivery. As we develop the strategy we will continue to test our approach by seeking independent input. At this stage we have undertaken a review of our demographic work and commissioned external consultants to develop our Accelerated Growth Scenario[2].

1.22 At this stage the focus is still at the Greater Manchester level, however the distribution of this growth across neighbourhoods is as important if we are to develop a framework which provides for all places in Greater Manchester to thrive.

1.23 We need to supplement our strategic work with an equally robust understanding of our economy, labour markets, health, skills levels and land supply. Our Deep Dive work, an ambitious and wide ranging research programme, is looking at the spatial concentrations of assets and opportunities around which future growth can be focused as well as the labour force characteristics and health outcomes which impact upon success of our places. This is a critical piece of work which will underpin the development of the GMSF as we move beyond high level growth ambitions and translate these into real proposals and interventions at the local level.

1.24 We will also be looking at GM's population and households in much more detail when census data is released. We will be preparing a full Strategic Housing Market Assessment (SHMA) addressing the type of growth we are forecasting, what this

2 The supporting documents prepared by Edge Analytics and Oxford Economics are available via the GMSF Strategic Options consultation pages on our consultation portal: https://gmsf-consult.objective.co.uk/portal

means for the type and tenure of accommodation at a more local level, looking at the ageing population as well as the economically active households which are critical to our sustained success.

1.25 We understand our current land supply and are doing much to bring forward brownfield land, in the short term through the Housing Investment Fund and over the medium term through GM Place. Our Residential Growth Strategy identifies the need for us to develop new relationships with new players in the housing delivery field as well as maximising the contribution of the volume housebuilders. Our priority is to maximise the contribution that brownfield sites can make to meeting our identified housing and employment needs.

1.26 Despite this however, we know that our existing land supply may not be sufficient to meet our needs, both for housing and employment land. We are preparing a Strategic Housing and Employment Land Availability Assessment (SHELAA), the first stage of which is the Call for Sites which accompanies this consultation [(3)] . We are looking to work with landowners, developers and others with an interest to identify new sources of supply to provide houses to attract working households and jobs to capitalise on our competitive advantages. We will develop a policy approach that seeks to phase development to meet both the needs of our regeneration areas and market demands.

1.27 At the same time we recognise that in order to accommodate the significant levels of development we believe are necessary, we need to consider our environmental capacity and low carbon opportunities so that development creates quality places where people want to live and invest, and does not result in increased risk to communities. Greater Manchester is proud of its long history of rising to meet challenges and using them to drive radical change. This continued capacity to not only meet but to embrace economic, social, technological and environmental change, defines the resilience of the conurbation. Greater Manchester has always looked to and built for the future and it continues to do so, investing in the capabilities to react effectively to unavoidable or unpredictable events and then to build back better afterwards. Through understanding risks and addressing them, we can derive multiple benefits from its investments – a robust spatial framework will help us to deliver this.

1.28 We have commissioned an assessment of our Green Belt - we have not considered the Greater Manchester greenbelt strategically since it was designated over 30 years ago. In this time land has been added and removed at the local level. The assessment will examine how the current Greater Manchester greenbelt performs against the 5 purposes set out in NPPF. At the same time we need to assess our multi-functional Green Infrastructure network to understand the role this plays and ensure that we protect and enhance our most important natural environments.

3 http://mappinggm.org.uk/call-for-sites/development-sites.htm

1.29 Finally, we will only be successful if we align development with an infrastructure network which is fit for purpose and which supports growth in a sustainable way.

1.30 Much of the physical infrastructure is 'fixed'. The transport networks, power stations and sewer systems are the result of significant historical investment. Yet these systems need to provide reliable and high quality services within both relatively 'slow' changing urban forms and the rapidly shifting 'flows' within certain geographical areas

1.31 Transport is fundamental to our vision for an expanded, prosperous and resilient Greater Manchester and we are developing a Transport Strategy for Greater Manchester to identify what may be required not just in terms of capital investment but in achieving greater modal shift away from the private car. Consultation on the Transport Vision has just concluded and we will consider the comments and feedback from this as we develop both the GMSF and the Transport Strategy.

1.32 Alongside transport we are working with infrastructure providers to explore ways in which we can invest in infrastructure in a more timely way to ensure that we secure energy and water supplies and maximise the opportunities that technological innovation brings. We will need to look at this in more detail once the strategic growth options are translated into a spatial pattern of development.

Question 2

What do you think the balance should be between local and strategic issues within the GMSF?

2 Vision

Our Vision

2.1 **By 2035, Greater Manchester will be one of the world's leading regions, driving sustainable growth across a thriving North of England. It will be ever more connected, productive, innovative and creative, known for the excellent quality of life enjoyed by our residents who are able to contribute to and benefit from the prosperity that growth brings.**

2.2 GM will be internationally renowned as a location where people want to live, work, visit and invest, sitting at the heart of the Northern Powerhouse, with economic performance in line with that of Greater London, boosting the economic growth of the UK as a whole.

2.3 Underpinning Greater Manchester's success will be a robust and diverse economy, which is able to continually respond to ever-increasing global competition. Greater Manchester will be a net contributor to UK wealth, providing attractive investment opportunities supported by a skilled and flexible labour force, and first-class infrastructure. Excellent connections within the UK and internationally will ensure that Greater Manchester is able to take advantage of opportunities across the world.

2.4 By building on the strengths of our key sectors, such as science, research and development, digital and creative business and financial and professional services, and by supporting our businesses we will accelerate job creation and increase productivity. Our places will be attractive to investors, businesses, residents and visitors.

2.5 All of our residents will be able to fully contribute to and benefit from the region's success, fulfilling their potential by taking part in the training and employment opportunities that growth brings, and collectively providing a huge pool of skilled talent to meet the needs of employers and investors. Our people will enjoy a high quality of life and good health with access to a wide choice of housing, employment opportunities and facilities, as well as to outstanding natural, historic and built environments.

2.6 Greater Manchester will be a highly productive, adaptive and resilient region, which is able to capitalise on the challenges and opportunities of a constantly changing world. It will be able to positively respond to climate change, technological innovation, emerging growth sectors, and the evolving needs and desires of its population. Continuing its strong history of economic dynamism, social advancement and cultural innovation, Greater Manchester will embrace change whilst retaining its distinctive character and that of its individual communities.

Our Ambition

2.7 By 2035 Greater Manchester will:

- be part of a **powerful Northern Powerhouse economy**, working with our neighbours as a dynamic counterweight and complement to the London and South-East economy;

- become a **net contributor to the national economy**, closing the gap between tax take and spending on public services and leading the economic growth of the North;

- **significantly reduce the productivity gap** with Great Britain – if GVA was the same as that of the GB average, our total GVA output would be £8.2 billion greater;

- be a **highly interconnected region** of thriving cities and towns, helping to re-balance and deliver growth for the national economy in the decades ahead;

- be part of a catchment area that includes Leeds, Sheffield, Liverpool, Lancashire, Cheshire and Yorkshire providing a **highly flexible and highly skilled workforce**, with a focus on high growth sectors;

- be a global **centre of outstanding scientific innovation**, creating additional, higher value, jobs in key sectors;

- provide a **housing offer** to meet the requirements of our growing population by building high quality new homes in the places people want to live;

- ensure that the scale and distribution of **infrastructure investment** is planned, co-ordinated and funded to support long term realisation of land for new homes and jobs

- have made the transition to a **low carbon economy**, delivering long term, secure, affordable low carbon energy systems and infrastructure to support sustainable and resilient growth;

- ensure that all our residents are supported on the journey to employment through integrated skills and employment system and by supporting the private sector, backing business investment and new start-ups in our **drive for full employment**;

- **transform our public services**, integrating the way we work across GM to focus on providing early help and preventative support to enable more of our residents to become independent and self-reliant, delivering:

    - improvement in school readiness rates.

- reductions in the number of looked-after children.
- improved educational attainment;
- an increased rate of employment and productivity for GM;
- reductions in offending.

Question 3

Do you agree with the Greater Manchester Vision and Ambition?

If you do not agree could you tell us why?

3 Strategic Approach and Objectives

3.1 Greater Manchester already has many positive qualities, but it could be even better. Given the high level of competition between major cities for investment, skilled workers and tourists, any strategy that involves 'standing still' will actually be likely to result in 'going backwards', as other cities continue to improve. Change is therefore inevitable, and the Greater Manchester Spatial Framework (GMSF) will need to focus on how to make that change as positive as possible, and ensure that Greater Manchester can distinguish itself from its competitors.

3.2 In order to deliver the vision set out above, Greater Manchester will have to make the most of its attributes, whilst addressing the issues that could detract from its success in the future. This needs to be done in a way that benefits all residents, as ultimately this should be a plan about people and how to make the places in which they live and work function more effectively for them.

3.3 The GMSF must be a plan for long-term success not just short-term development. Although it is tempting to focus on immediate targets and investment opportunities, Greater Manchester will only be successful if there is a coherent strategy that balances all of its priorities in the much longer term and ensures that these are supported rather than compromised by more immediate decisions.

3.4 This section outlines the overall strategic approach that it is proposed that the Greater Manchester Spatial Framework should take, responding to the key issues, challenges and opportunities that have been identified. It has been broadly structured around the three themes of economy, place and people, although it is important to recognise that there is significant overlap and interconnections between them, for example in relation to issues such as climate change, green infrastructure and transport.

Economy

3.5 A strong and sustainable economy will be a prerequisite for a successful Greater Manchester. As the global economy becomes ever more competitive, Greater Manchester will need to ensure that it continuously improves its attractiveness to businesses, investors and skilled workers, otherwise it will risk decline rather than securing progress. This will require a wide range of measures, not just in terms of the economy specifically but also in relation to places and people.

City Centre

3.6 The concentration of economic activity at the heart of the conurbation, focused around Manchester City Centre, is Greater Manchester's most important competitive advantage, supplying the high profile focus that is vital to any world city. The city centre alone provides over 140,000 jobs in what is by far the most accessible location within Greater Manchester, offering a range of business opportunities that is unrivalled in the North of England. **The protection and significant enhancement of this economic role of the city centre will be a fundamental priority for the GMSF.**

3.7 At present, planning policy distinguishes between a quite tightly drawn 'city centre', located within the inner ring road and extending along Oxford Road to Whitworth Park, and a significantly larger 'regional centre' that stretches from MediaCityUK and the University of Salford in the west to the Etihad Campus and Central Park in the east**. It will be important that the whole of this wider regional centre area is successful, and it will be the key focus for economic activity in Greater Manchester, driving growth across the sub-region and beyond. The GMSF will emphasise the importance of recognising the different roles of each part of this regional centre area.** Major improvements in walking, cycling and public transport links between the various quarters of the regional centre will be a key priority, enabling it to function much more effectively as a single entity and consequently to take full advantage of its size and strength for the benefit of Greater Manchester as a whole.

Town Centres

3.8 Although the city centre provides a strong central focus for the conurbation, Greater Manchester is a 'polycentric' sub-region, with the eight main town centres of Altrincham, Ashton-under-Lyne, Bolton, Bury, Oldham, Rochdale, Stockport and Wigan fulfilling essential economic and social roles generally at the local level. They provide significant concentrations of employment, retail and leisure opportunities, with good public transport connections to surrounding communities, and are very important contributors to local identity. **The GMSF will maintain the existing hierarchy of a single city centre, complemented by these eight main town centres, and this will form the basis of the overall spatial strategy for Greater Manchester. It will seek to develop the roles of the main town centres as local economic drivers, helping them to respond to long-term structural changes and evolving economic, retail and leisure demands whilst building on competitive strengths where they exist** . It will also support improved connections between them, promoting a wider range of business opportunities and increasing the number of residents that both live there and can access their services and facilities.

Other Employment Locations

3.9 The city centre and town centres will provide the main concentrations of economic activity in Greater Manchester, but many other locations across the sub-region will also have an important economic role, collectively making a major contribution to economic growth and job creation. **The GMSF will seek to exploit the competitive advantages of other locations in a way that complements activity**

in the city centre and town centres, such as the very large expanse of industrial activity within Trafford Park core area and the adjacent Trafford Centre, one of the UK's primary retail and leisure destinations.

Rural Areas

3.10 Whilst Greater Manchester is defined as a predominantly urban conurbation, almost 25% of its land area is characterised as rural. Communities within these areas can face specific needs in relation to access to employment and facilities. At the same time the attractive character of many of these areas may provide unique opportunities for Greater Manchester, in relation to tourism, leisure, agriculture and supporting healthy and active lifestyles. **The GMSF will consider how our rural areas can contribute to the long term success of Greater Manchester whilst retaining the characteristics which make them distinctive and unique.**

Widespread Economic Success

3.11 A relatively small number of locations will make a disproportionate contribution to sub-regional economic growth, and their success will be fundamental to Greater Manchester's prospects. Nevertheless, it will be essential that all parts of Greater Manchester are able to find a strong and positive economic function to support future growth and to maximise their ability to share in its benefits.

3.12 **The need to enhance the economic role of parts of Greater Manchester will be a priority for the GMSF**, building on the potential opportunities afforded by the wider Northern Powerhouse proposals. The Deep Dive work will contribute to the demand and supply side evidence about the strengths of the local economy. This must be focused on securing net additional investment to Greater Manchester if long-term sub-regional growth prospects are to be enhanced.

3.13 Major interventions may be required to exploit this potential and transform the growth prospects, both in terms of employment and housing (as well as labour market and skills) of these areas, so that they are better able to attract investment targeted at more than just the local market.

3.14 Transport infrastructure is a high priority, both in terms of improvements to the strategic road and rail networks (for example, HS2 and the Trans Pennine Tunnel currently being assessed by central government), and also better orbital connectivity to other places within Greater Manchester.

Transport Connections

3.15 Greater Manchester's future economic success will require significant improvements in the ability of people and freight to move easily around the region, reducing business costs and uncertainties, and improving the attractiveness of the area for workers. **Better, more integrated transport infrastructure within Greater Manchester is key to ensure residents are able to access the widest range of employment opportunities.**

3.16 However, Greater Manchester's economic potential will rely not just on what happens within the area, but also on the ability to develop strong links with other burgeoning economies. **High quality transport connections to other major cities both within and outside the UK are therefore essential, providing business and investment opportunities, widening the labour market, reducing time-related costs, and enhancing the quality of life for residents.** Greater Manchester already has some considerable strengths in this regard, but it will need to significantly enhance its connectivity in the future if it is to fully realise its potential, and a lack of transport investment would constrain its economic growth.

Manchester Airport

3.17 Manchester Airport is the third busiest airport in the UK, after Heathrow and Gatwick, and is the only airport in England other than Heathrow with two full length runways. It is therefore a key asset for the country, and its range of international connections provides a competitive advantage for Greater Manchester compared to many other regional cities. The transformational activity at the airport, in an environmentally sensitive manner, would offer major opportunities to stimulate growth not just within Greater Manchester but across the North of England as a whole, as well as providing an alternative to congested airports in the South East. **Consequently, the GMSF will support continued investment in the airport, increasing its importance as an international gateway and enabling a doubling of passenger numbers**. It will also encourage new sites to be brought forward for employment development around the airport, helping to attract and retain a wide range of global businesses that can generate significant employment opportunities and wealth. Anchored by the Airport, the Manchester Enterprise Zone coordinates a cohesive cluster of distinctive and highly-connected development sites in close proximity to Manchester Airport – including the core initiatives of Airport City and MediPark. It represents an opportunity of transformational significance for the entire Greater Manchester city region and the proposition aims to attract global businesses, creating new employment opportunities and stimulating economic growth – locally, regionally and nationally.

Manchester Ship Canal

3.18 The Manchester Ship Canal provides direct shipping links to Liverpool, enabling Greater Manchester to share in some of the advantages that coastal cities have for freight movement, but at present it is underused. The completion of deeper water container berths at the Port of Liverpool are expected to help Liverpool double its share of the container market, and this offers new opportunities for Greater Manchester via the Manchester Ship Canal, particularly at Port Salford. **The GMSF will promote much greater use of the canal, helping to put Greater**

Manchester at the forefront of sustainable freight movement. In particular, it will support the development of nationally significant logistics facilities and associated sectors at key locations, taking advantage of the multi-modal opportunities and excellent access to some of the country's largest markets, where this is compatible with a significant overall reduction in the quantity of freight moved by road.

Links to London

3.19 London is one of a handful of genuinely global cities, and together with the wider South East region generates huge wealth for the whole country. **The GMSF will seek to maximise the benefits for Greater Manchester of this economic strength, by enhancing the speed, capacity and quality of transport connections between the sub-region and London.** The early completion of the High Speed 2 rail link, with stations in the city centre and at Manchester Airport, will be central to this, complemented by continued improvements on existing lines. Maximising development opportunities around existing stations that have mainline access to London such as Manchester Piccadilly, Stockport and Wigan, as well as potential new HS2 stations,will help to ensure that full advantage is taken of the resulting economic potential.

Links To Other Cities

3.20 As the Northern Powerhouse has highlighted, the economic connections between the major cities and towns of the North are not as strong as might be expected given their relatively close proximity. Significant enhancements in transport links between them would open up considerable growth opportunities, enabling them to provide the scale of activity required to compete with 'supercities' across the world, and helping to rebalance the national economy. Greater Manchester's central location puts it in a primary position both to make a major contribution to, and take full advantage of, a more integrated North of England. **The GMSF will therefore support major improvements in road and rail links with Leeds, Liverpool and Sheffield in particular, but also to other important economic centres such as Macclesfield, Preston and Warrington. It will also seek to ensure that there is land available in the best locations to take advantage of these improved connections, and that Greater Manchester residents can easily access them.**

Motorways

3.21 The extent of Greater Manchester's motorway connections is an important selling point for the sub-region, and on the face of it provides easy access around the conurbation and to surrounding cities and regions. However, the benefits of the motorway network are often constrained by high levels of congestion. Whilst our overall strategy is to maximise travel by non-car modes **the GMSF will seek to facilitate major improvements in motorway capacity in order to improve journey**

times and enable the proper functioning of the motorway network in this part of the country. This is likely to open up new development opportunities, particularly in logistics .

Modal Shift

3.22 More generally, transport congestion within and around Greater Manchester, both on highways and public transport, has been identified as one of the most significant constraints on future economic growth. Although measures to enhance highway capacity will be necessary, it will only be possible to accommodate even relatively modest levels of economic growth if there is a very significant shift in the proportion of travel by private car to more sustainable transport modes such as walking, cycling and public transport. This will also be essential for ensuring that residents are able to access all of the opportunities and facilities within and around Greater Manchester. **The GMSF will therefore seek to ensure that the location and density of development maximises the potential for people to walk, cycle and use public transport, and reduces car dependency, which will require careful site selection.** The scale of development will be contingent on very high levels of investment in public transport, coupled with a much more integrated approach to service provision and ticketing. Without this, the required increase in public transport use will be unrealistic. It may also need to be complemented by measures to reduce the demand for private car use.

Economic Diversity

3.23 One of Greater Manchester's most positive attributes is its economic diversity. It will be vital to maintain this in the long term, so that Greater Manchester is as resilient as possible to any economic downturns and able to take full advantage of the growth opportunities across different sectors. This will require a broad mix of sites and premises to be available, in terms of location, type and cost. **The GMSF has an important role in ensuring that there is a suitable and varied range of sites for new employment developments in locations that are attractive both to changing business requirements but also provide high quality working environments.** We need to promote technological innovation and productivity improvements, as well as retaining existing accommodation for which there remains a demand. This will need to be complemented by measures to develop, attract and retain sufficient labour with the appropriate skills.

Key Economic Sectors

3.24 Although economic diversity is essential, it will also be important for Greater Manchester to maximise opportunities in key economic sectors that will help to drive forward high levels of growth and prosperity, particularly those in which it has the potential to develop a competitive advantage compared to other cities. **The GMSF will support the development of existing nationally significant clusters of activity, such as those in professional and financial services in the city centre**

core, and digital and creative industries in Manchester City Centre and MediaCityUK, as well as providing opportunities for new clusters to emerge, for example logistics at Trafford Park, Heywood, along the M6 Corridor and Port Salford. It will also seek to maximise links to associated activities beyond the boundaries of Greater Manchester, such as with health sciences at Alderley Park (in Cheshire East) and Daresbury (in Warrington).

Knowledge Assets

3.25 One of the most significant strengths of Greater Manchester is the high concentration of knowledge assets, including its universities, hospitals and science parks. This is particularly seen within The Corridor, which is focused around Oxford Road in the south of the city centre**. Knowledge assets are likely to become increasingly important drivers of economic growth, and so the GMSF will provide strong support for their future expansion and the development of associated activities and spin-off businesses. It will also seek to ensure that Greater Manchester can offer the highest quality student experience, in terms of learning facilities, housing and leisure opportunities, so that its universities can compete successfully with the best across the world.**

Tourism

3.26 One of the best ways in which the Greater Manchester 'brand' can be promoted globally so as to support economic growth is through a very significant increase in tourism. Manchester is already one of the most popular city visitor destinations in the UK, and Greater Manchester as a whole has a wide range of attractions, including particular strengths in the performing arts, shopping and sport. **The GMSF will support a major expansion in tourism activity.** A central component of this will be improving the quality of places and range of attractions that people are able to experience both within the urban area but also access to our countryside which provide active leisure and tourism opportunities. This will also significantly enhance the quality of life for residents.

Question 4

Have we identified the key economic issues the GMSF should address?

If not could you let us know what needs adding or removing and the reason why.

Place

3.27 As competition between locations increases, for example in terms of the ability to attract skilled labour or secure major business investment, the quality of places will become ever more important in distinguishing one location from another. The individual towns and neighbourhoods of Greater Manchester typically have strong identities, which contribute to a diverse and distinctive region. **The GMSF will seek to ensure that the location and design of new development maintain and enhance this local identity, and avoid increasingly homogeneous places that are difficult to differentiate from one another.** It will also support and enhance the distinctive cultural identity that elevates the Manchester brand at the international level, for example in terms of its reputation in sports and the arts. This includes as a venue and innovator, as well as performance.

3.28 Greater Manchester has an extraordinarily important and diverse history which is reflected in a rich historic environment of archaeological sites, monuments, conservation areas and buildings. The historic environment assets of Greater Manchester include: Prehistoric burial mounds and hillforts; Roman forts; Medieval townscapes and the Post-Medieval legacy of the region's industrial past (such as canals, railways and textile mills).

Design quality

3.29 Greater Manchester has some very high quality places and buildings, but poor design has detracted from the attractiveness and effective functioning of some areas. **The GMSF will place a strong emphasis on the importance of good design helping to create places that are successful in the long-term, support a high quality of life, reinforce local identity and distinguish Greater Manchester from its competitors**. GMSF will consider the role of design and space standards in promoting higher quality design.

3.30 A central objective for the GMSF will be to ensure that new development enhances the quality of places, thereby putting Greater Manchester in the best possible position to be successful in the long term and providing an excellent quality of life for its residents.

An adaptive sub-region

3.31 Greater Manchester will have to evolve and adapt if it is to meet the challenges that it will face over the next few decades, for example in terms of technological advancements, environmental change, demographic pressures, and the shifting needs of residents and businesses. This will inevitably mean that many places will themselves see quite considerable change, sometimes involving a significant alteration in their function, and the GMSF will seek to ensure that this has a beneficial impact overall. By facilitating and driving positive change, Greater Manchester has the opportunity to become a much more successful and attractive place to live, work and visit, but the appropriate controls must be in position to secure this. The GMSF will also support the ‘future-proofing’ of Greater Manchester, so that the built and natural environments can continue to adapt rapidly to evolving needs and requirements rather than acting as a constraint.

Environmental Quality

3.32 The natural environment can be a very important distinguishing feature of a city, whether it is a major river, coastal setting or mountain range, providing a distinctive identity and helping to sell the city as a location to live, work and visit. Greater Manchester has significant and somewhat untapped potential in this regard, with several river valleys running through it, the Pennines providing an attractive backdrop to the north and east, the Cheshire Plain extending to the south, and the distinctive and ecological significant wetlands and mosslands to the west, as well as having easy access to diverse and beautiful national parks such as the Peak District, Yorkshire Dales, Lake District and Snowdonia. **The GMSF will ensure that Greater Manchester makes the most of this potential, and responds sensitively and positively to the natural environment so as to create a harmonious interaction between landscape and townscape that maximises its unique identity. More generally, the GMSF will support the protection and enhancement of important natural and historic assets, both for their own benefit and for the very positive contribution that they can make to the social and economic health of the sub-region.**

Green And Blue Infrastructure

3.33 Features such as green spaces, trees, waterways and the countryside are a major contributor to quality of life, providing opportunities for recreation, an attractive environment and a connection with nature. The success of waterfront/waterside locations such as Salford Quays demonstrates the potential that attractive environments have as a focus for new development. If Greater Manchester is to be a place where people actively want to live, work and visit then it will be essential that it has a high quality network of green and blue infrastructure running throughout it. Without this, it will struggle to compete with other cities for investment and skilled labour, compromising its long-term economic growth as well as reducing the quality of life for its residents and detracting from its environmental sustainability. **The GMSF will therefore provide strong protection for important existing green and blue assets, encourage increased provision in locations that are poorly served, and seek to improve the quality, multi-functionality and integration of Greater Manchester's green and blue infrastructure networks.** This may require giving a higher priority to green spaces within the urban area that make a significant contribution to the quality of places than to those outside the existing urban area that make a more limited contribution.

Climate Change

3.34 Climate change will become an increasingly significant issue during the rest of the century, setting major challenges for all parts of the world. In order for Greater Manchester to be sustainable in the long-term, it is essential that it is able to dramatically reduce its greenhouse gas emissions and mitigate the impacts of a changing climate. Cities that rise to such challenges will be in a much better position socially and economically, as well as environmentally, for example with residents benefiting from lower energy costs and greater economic opportunities, and Greater Manchester must be at the forefront of this if it is to achieve its vision. **Climate change will therefore be a key theme running throughout the GMSF, for example in terms of ensuring that development is located so as to reduce the need to travel, maximise the use of sustainable travel modes, support low carbon energy use and minimise the impacts of extreme weather events. It will also further enhance the importance of high quality green infrastructure, helping to reduce the impacts of the urban heat island and enabling plants and animals to adapt to a changing climate.**

Flood Risk

3.35 Parts of Greater Manchester are vulnerable to significant flood risk, including parts of the city centre, and climate change is expected to increase considerably this risk over the next century. **The GMSF will seek to deliver a coordinated approach to reducing and mitigating flood risk across river catchments, which may require actions outside Greater Manchester in order to reduce the amount of water entering the sub-region following high precipitation events, as well as the use of green infrastructure and sustainable drainage systems within Greater Manchester.**

Air Quality

3.36 Large areas of Greater Manchester suffer from poor air quality, breaching EU standards, particularly around major roads. This has a negative impact on the health of residents, detracts from Greater Manchester's investment potential and has already constrained proposed highway improvements. **The GMSF will support a coordinated approach to addressing poor air quality, including a very significant shift to more sustainable and less polluting modes of transport, which will impact on the appropriate location of new development and could potentially involve the use of low emission zones.** The provision of green infrastructure will again be important, particularly within the urban area, providing opportunities to soak up pollutants.

Regeneration

3.37 The long-term success of Greater Manchester will depend on achieving sustained investment in existing places, thereby ensuring that they can continue to function effectively and remain locations where people want to live, work and visit. **The GMSF will strongly prioritise the reuse and redevelopment of existing buildings and previously-developed land, which will help to secure this essential investment and minimise the loss of green spaces both within and outside the urban area**. Given the scale of growth outlined in the options, this prioritisation may not prevent the need to release some areas of Green Belt for development.

Infrastructure

3.38 If places are to function successfully then they require the full range of necessary infrastructure, and this is often one of the biggest concerns for existing residents when new development is proposed. **The GMSF will seek to coordinate investment in all types of infrastructure, including utilities, transport, schools and health facilities. It will make the most of existing infrastructure through the location of new development, and identify where major new investment is required to support development in key locations**. In some areas, additional development may only be possible once new or improved infrastructure has been delivered.

A Smart City

3.39 One of the key ways in which cities will be able to develop a competitive advantage and successfully manage the challenges of growth is by effectively harnessing the potential of 'smart infrastructure'. The availability and use of data will become increasingly important in making places more liveable and enabling them to function efficiently, for example in terms of the management of transport, energy and services, and the identification and enjoyment of leisure opportunities. **The GMSF will support Greater Manchester's development as a smart city, and a key component of this will be ensuring high levels of digital connectivity across the urban area.** Equally important will be how the GMSF and complementary strategies are implemented, for example in terms of how they maximise the collection, use and public availability of data, to improve the delivery of both public and private services.

Question 5

Have we identified the key place based issues the GMSF should address?

If not could you let us know what needs adding or removing and the reason why.

People

3.40 The highest priority for the GMSF is that the residents of Greater Manchester benefit from the growth and investment that will take place over the next few decades. Although there are particular issues that are specifically about people, **all aspects of the GMSF, including those relating to the economy and place discussed above, must be designed and implemented to enhance the lives of Greater Manchester's residents.**

Increasing Economic Activity Rates

3.41 Central to this is ensuring that residents are able to take advantage of the employment opportunities that are brought by economic growth. There is a wide range of initiatives taking place outside the GMSF that are aimed at significantly increasing the proportion of residents in employment, including those based around skills, health and public service reform. The GMSF takes as a starting point that these initiatives are successful, and therefore that strong economic growth is realistic and that a significant proportion of the new jobs that are created are taken up by Greater Manchester residents.

Education And Skills

3.42 Education and skills development will be vital to enabling Greater Manchester residents to compete effectively in the labour market and access new jobs. **The GMSF will strongly support the provision of new and improved schools, colleges, universities and training facilities**. It will also seek to ensure that Greater Manchester is able to attract and retain the skilled labour that will be a prerequisite for future economic growth, by delivering the high quality places, employment opportunities and lifestyles that can compete with other cities across the world, and in particular help to reduce the outflow of highly qualified people to London. The GMSF will also recognise the benefits of Greater Manchester having many attractive neighbourhoods located just outside its boundaries, which provides an additional supply of skilled labour to support the conurbation's economic growth

Health

3.43 Average life expectancy in Greater Manchester is around two years shorter than the national average, and there are significant health disparities across the sub-region. There is an even wider gap in healthy life expectancy between Greater Manchester and the national average, which impacts not only on people's ability to enjoy life but also their participation in the labour market.

3.44 **Improving health outcomes for our residents is a key priority for Greater Manchester and is one of the drivers behind our integrated reform programme. This links health & social care to work ,employment and early years to address the fundamental challenge of ensuring that the system becomes financially sustainable over time, and that improved health and well-being outcomes support our objective of reducing worklessness and supporting people back into employment.**

3.45 **Improving health will be a central theme of the GMSF, not just in terms of enhancing health facilities and services, but also in ensuring that healthy lifestyles are supported and risks to health are minimised. This will involve a wide range of measures, for example around promoting more walking and**

cycling, providing higher quality green infrastructure, addressing poor air quality, minimising flood risk, and enabling residents to share in the benefits of economic growth.

Housing

3.46 Greater Manchester has a wide range of housing, but the quality and affordability can vary significantly between places. The GMSF will support major investment in new and existing housing so that everyone has accommodation that meets their needs within neighbourhoods that are good places to live.

3.47 There are already well over 1 million dwellings within Greater Manchester, but many more will be required over the next few decades to meet the needs of a growing population. The provision of too little new housing risks problems of worsening affordability and an inadequate labour supply to meet the needs of businesses, but too much new housing could result in increasing vacancy levels, wasted investment, the inefficient use of land, and the unnecessary loss of green infrastructure. **The GMSF will carefully balance the supply of new housing, identifying the appropriate scale and broad distribution of new dwellings to ensure that needs are met, and will set out how the supply will be managed if demand is higher or lower than anticipated**.

3.48 A wide range of new housing will be required to meet the varied needs and aspirations of different types of household, including supported and specialist accommodation as well as mainstream housing. Our demographic profile is changing – the majority of growth in households is forecast to be single person households reflecting more younger people at the core of the conurbation but also growth in the numbers of older people in the surrounding districts. Our housing offer needs to respond to these changes to ensure that it is capable of both capturing wealth generating households and is aligned to our integrated approaches to care. Our investment models need to support the market to match those changing demographic requirements. **The GMSF will aim to secure a broad distribution of dwelling types across Greater Manchester, whilst also recognising that individual places have specific roles that make them more suitable for particular forms of housing.**

3.49 Housing in Greater Manchester is generally quite affordable compared to many other locations within the UK, and this is a key selling point for the sub-region that needs to be maintained in the long-term. Nevertheless, there remains a significant demand for additional affordable housing, which is as much a function of low household incomes as high housing costs. **The GMSF will support a considerable increase in the supply of affordable homes across Greater Manchester, as part of a coordinated approach to ensuring that there is an expansion of all tenures in a way that provides a suitable supply of dwellings at all price points, both for sale and rent.**

3.50 Although a large amount of new housing will be required, most of the homes in which people will live in 2035 already exist. The GMSF will support investment in the current housing stock and the neighbourhoods in which it is located, so as to ensure that all of Greater Manchester's housing is of a high quality that meets the needs of residents. This may require complementary measures such as landlord licensing in order to improve quality within the private rented sector and ensure that those reliant on it are not disadvantaged.

Question 6

Have we identified the key issues for residents that the GMSF should address?

If not could you let us know what needs changing and the reason why.

Question 7

Do you agree with our overall Strategic Approach and Objectives?

If not, could you let us know what you think we have missed, or what should not be included?

Question 8

Are there any other key strategic issues we should consider?

If yes what issues should we consider?

4 Growth options

Growth Options

4.1 One of the most important decisions that the Greater Manchester Spatial Framework will make relates to the overall scale of growth that should be sought in Greater Manchester up to 2035. This will directly influence the amount of new housing and employment floorspace that will need to be accommodated in Greater Manchester and each of its ten districts, and therefore the amount of land that must be found for development.

4.2 It is important to recognise that growth will be required to deliver many aspects of the vision for Greater Manchester, such as ensuring that there are jobs, homes and facilities available for residents. We need to guard against artificially constraining the growth ambitions of Greater Manchester however equally, there may be a point above which increasing the level of growth will start to detract from Greater Manchester's long-term success and act as a brake on our ambitions. The preferred scale of growth therefore needs to balance a wide range of economic, social and environmental objectives, so that Greater Manchester has a genuinely 'sustainable' future in every sense of the word.

4.3 We are looking to test our approach through this consultation, however we are also seeking verification of our approach through independent scrutiny and have commissioned Edge Analytics to review our methodology and assumptions. We will use this independent work to further inform our analysis after we have received comments from our wider stakeholders so that we will be able to present a robust and ambitious assessment of our growth potential which is realistic, although undoubtedly challenging, to deliver.

4.4 Two separate reports have been produced on the need for housing and employment floorspace in Greater Manchester over the period 2014-2035[4]. These reports analyse a wide variety of evidence before reaching a conclusion as to the scale of development that would be required to meet the best estimate of future need for housing and employment floorspace, taking into account the ambitious vision for Greater Manchester. They conclude that Greater Manchester should be planning for the following levels of development over the period 2014-2035, referred to as the 'objectively assessed need':

- 217,350 net additional dwellings, which equates to an average of 10,350 net additional dwellings per annum

4 AGMA (November 2015) Objectively assessed housing need, and AGMA (November 2015) Economic development needs assessment

- 3,452,000m^2 of new industrial and warehousing floorspace, which equates to an average of just under 164,400m^2 per annum
- 2,399,000m^2 of new office floorspace, which equates to an average of just over 114,200m^2 per annum

4.5 The need for this number of dwellings is based largely on the latest Government household projections[5]. However, net international migration to the UK has significantly exceeded forecasts levels in the first few years of those projections, and it would seem likely that this will continue for several years in the future. It has therefore been assumed that there will be higher than projected levels of net international migration to Greater Manchester up to 2023, after which such migration will return to the levels expected in the official projections.

4.6 The need for this amount of employment floorspace is based around an economic forecast that assumes that two key objectives set out in the Government's long term economic plan for the North West[6] will be met, namely:

1. To increase the long term growth rate of the North West to at least the forecast growth rate of the whole of the UK
2. To raise the employment rate in the North West to the UK average, which would ensure that over 100,000 additional people are in employment in the North West during this Parliament (i.e. by 2020)

4.7 These objectives are seen as being essential to ensuring that the economy of the UK is better balanced, enabling the North of England to capture a fairer share of economic growth and prosperity. Given the size and strength of Greater Manchester's economy, it is assumed that it will play a leading role in achieving these objectives for the North West. This would result in higher levels of economic growth for Greater Manchester than if past trends and relationships continued along broadly similar lines in the future.

4.8 In light of the evidence available, three options have been identified, which cover the broad range of future growth levels to which Greater Manchester could aspire. These three options are set out below.

5 Department for Communities and Local Government (February 2015) 2012-based household projections in England, 2012 to 2037

6 HM Government (8 January 2015) Long term economic plan for the north-west set out by Prime Minister and Chancellor - www.gov.uk/government/news/long-term-economic-plan-for-the-north-west-set-out-by-prime-minister-and-chancellor

Option 1

4.9 The ten local authorities in Greater Manchester have each identified the sites that they think could help to meet development needs over the period 2014-2035, in a way which would be broadly compliant with existing planning policies, for example in terms of protecting open spaces and the Green Belt.

4.10 An option that was based around this existing land supply would deliver the following levels of development over the period 2014-2035:

- 152,800 net additional dwellings, which equates to an average of almost 7,300 net additional dwellings per annum
  - This would be a decrease of 2% on the annual average net additional dwellings provided over the period 2004-2014[7]
  - It would be 30% lower than the objectively assessed need identified above
- 2,526,000m^2 of new industrial and warehousing floorspace, which equates to an average of just under 120,300m^2 per annum
  - This would be a decrease of 20% on the annual average new industrial and warehousing floorspace provided over the period 2004-2014[8]
  - It would be 27% lower than the objectively assessed need identified above
- 2,573,300m^2 of new office floorspace, which equates to an average of just over 122,500m^2 per annum

7 According to DCLG live table 122, an average of 7,395 net additional dwellings were provided each year in Greater Manchester over the period 2004-2014

8 It is normally considered that the supply of potential sites for employment floorspace should exceed the required level of provision by around 20%, so as to provide choice and flexibility to meet the varied requirements of businesses. The districts have identified a total supply capable of accommodating 3,031,200m2 of industrial and warehousing floorspace, but in practice, due to the 20% buffer, this would be expected to deliver around 2,526,000m2 of new floorspace (3,031,200 divided by 1.2, rounded to the nearest 100). District monitoring identifies that an average of 151,001m2 of new industrial and warehousing floorspace was provided each year over the period 2004-2014.

- This would be an increase of 16% on the annual average new office floorspace provided over the period 2004-2014[9]
- It would be 7% higher than the objectively assessed need identified above

4.11 This is a significantly lower level of housing and industrial/warehousing development than it is considered would be necessary to meet the best estimate of future needs, having regard to the proposed vision. It would also result in a reduction in the average levels of such development seen each year compared to the previous ten years. In contrast, the supply of sites for offices would be more than sufficient to meet the identified need.

4.12 As the economy continues to recover, the densities of some housing developments are increasing, particularly in and around the city centre. Consequently, when districts update their housing land supplies next year, the total supply could increase by several thousand without utilising any additional open land, potentially to the equivalent of around 8,000 dwellings per annum. However, this is still well below the objectively assessed need, and any further significant supply increase would be unlikely without additional sites being identified.

4.13 Consequently, under this option the supply of sites would effectively constrain the scale of economic growth that could be seen across Greater Manchester, and potentially its ability to compete with other major cities for investment. Given the relatively low supply of new industrial and warehousing floorspace, much better use of existing floorspace would need to be made, and if this could be successfully achieved then this option could potentially deliver growth close to the forecast national average of 2.5% per annum[10].

4.14 This lower level of growth and development than the objectively assessed need could have a number of negative consequences. For example, it would limit the potential for the rebalancing of the national economy, with Greater Manchester and the rest of the North of England likely to fall further behind London and the South East. The reduced availability of new housing would limit the ability to attract and retain skilled workers, and increasing numbers of people may start to move to other cities that provide better employment and housing opportunities. By providing fewer opportunities for new industrial and warehousing floorspace, businesses may start to move to other cities across the UK and Europe, leading

9 The districts have identified a total supply capable of accommodating 3,087,900m2 of office floorspace, but in practice, due to the 20% buffer, this would be expected to deliver around 2,573,300m2 of office floorspace (3,087,900 divided by 1.2, rounded to the nearest 100). District monitoring identifies that an average of 105,240m2 of new office floorspace was provided each year over the period 2004-2014.

10 The 2014 Greater Manchester Forecasting Model baseline forecast identifies a growth rate for Greater Manchester of 2.5%, but the lower level of new industrial and warehousing floorspace compared to past levels could lead to a slightly reduced growth rate

to a gradual decline in Greater Manchester's fortunes and economic diversity. The relatively large amount of potential office development identified could offset this to some extent, but the limited supply of new housing could significantly increase the number of people commuting into Greater Manchester if all of the office development was to be delivered, worsening congestion and air pollution. It is also questionable whether so much new office development would be delivered in practice if other parts of the economy were seen to be constrained.

4.15 However, Option 1 would clearly have the significant benefit of reducing the amount of existing open land that would be lost to development, as no additional sites would be required beyond those that have already been identified by districts. It is possible that a constrained land supply could encourage more efficient use of land within the urban area and increase housing and employment densities beyond those assumed in the needs assessment, but it also risks investment being lost to other locations. This option would enable the retention of existing Green Belt boundaries, and would help to protect agricultural land across Greater Manchester. Lower levels of development would also reduce the investment that would be required in new and improved infrastructure, such as transport and schools.

Option 2

4.16 As explained in the introduction to this section, a large amount of work has been undertaken to provide a best estimate of the scale of population, household and economic growth that should be planned for, having regard to the positive vision for a successful Greater Manchester. Option 2 would seek to deliver this objectively assessed need, and so would involve the following levels of development over the period 2014-2035:

- 217,350 net additional dwellings, which equates to an average of 10,350 net additional dwellings per annum
  - This would be an increase of 40% on the annual average net additional dwellings provided over the period 2004-2014[11]
- 3,452,000m^2 of new industrial and warehousing floorspace, which equates to an average of just under 164,400m^2 per annum

11 According to DCLG live table 122, an average of 7,395 net additional dwellings were provided each year in Greater Manchester over the period 2004-2014

    - This would be an increase of 9% on the annual average new industrial and warehousing floorspace provided over the period 2004-2014[12]

- 2,399,000m^2 of new office floorspace, which equates to an average of just over 114,200m^2 per annum
    - This would be an increase of 9% on the annual average new office floorspace provided over the period 2004-2014[13]

4.17 When combined with the scale of population and household growth associated with the housing need identified above, it is estimated that economic growth in Greater Manchester would average around 2.8% per annum over the period 2014-2035. This would be above the forecast growth rate of 2.5% per annum for the UK as a whole, but slightly behind the forecast for London of 3.0%[14]. The increase in the scale of development compared to the previous ten years, both in relation to housing and employment floorspace, also shows that this would be a very positive option in terms of trying to boost economic growth and prosperity across Greater Manchester.

4.18 When compared with the existing supply described under Option 1, the districts have identified sufficient sites to accommodate all of the office development that is required under Option 2, but there is a significant shortfall in the supply of sites that would be needed for housing and industry/warehousing. Thus, under Option 2, additional sites would need to be identified sufficient to accommodate:

- 64,550 net additional dwellings[15]
- 1,111,200m^2 of new industrial and warehousing floorspace[16]

4.19 There may be some potential to increase the supply of sites within the existing urban area or identify additional sites in existing employment areas. In terms of housing, this could involve increasing the density of residential development on sites that have already been included in the supply, or identifying additional sites in existing employment areas where such sites are no longer considered suitable for continued employment use. For industrial and warehousing floorspace, there

12 District monitoring identifies that an average of 151,001m2 of new industrial and warehousing floorspace was provided each year over the period 2004-2014
13 District monitoring identifies that an average of 105,240m2 of new industrial and warehousing floorspace was provided each year over the period 2004-2014
14 The figures for the UK and London are from baseline forecasts produced by Oxford Economics.
15 Requirement of 217,350 minus identified supply of 152,800
16 Requirement of 3,452,000 plus 20% minus identified total supply of 3,031,200 referred to in footnote 8 (i.e. (3,452,000*1.2) – 3,031,200)

may be some opportunities to extend or redevelop existing premises. However, it will be essential that any increase in the amount of development within the existing urban area does not result in the loss of important green infrastructure or diminish the quality of neighbourhoods, as this would detract from Greater Manchester's future success. It is likely that a significant proportion of the additional supply would have to involve the development of land outside the existing urban area, and some of this may be in the Green Belt.

Option 3

4.20 Option 2 focuses on seeking to meet what is considered to be the best estimate of likely future needs. Inevitably it is based on a wide range of assumptions, and relatively small changes in those assumptions could lead to much higher or lower levels of forecast growth. If it was assumed that net migration into Greater Manchester was much higher than forecast and average household sizes were smaller, then the amount of housing that would be required could increase significantly. Similarly, although Option 2 supports increased levels of economic growth compared to past rates, it could be argued that if the national economy is to be rebalanced and Greater Manchester is to achieve its full potential then we should be aspiring to even higher levels of growth.

4.21 One proposal that has been put forward by the development industry, under the banner of 'Housing the Powerhouse', is that Greater Manchester should be accommodating an average of 16,000 net additional dwellings per annum in the future[17]. In order to support this level of new housing, an increased rate of economic growth compared to Option 2 would also be required.

4.22 Option 3 is based around such an approach, and would involve the following levels of development in Greater Manchester over the period 2014-2035:

- 336,000 net additional dwellings, which equates to an average of 16,000 net additional dwellings per annum
  - This would be an increase of 116% on the annual average net additional dwellings provided over the period 2004-2014[18]
  - It would be 55% higher than the objectively assessed need identified above

17 The 'Housing the Powerhouse' campaign is led by the Home Builders Federation, and the other member organisations are Ainscough Strategic Land, Barratt Homes, Bloor Homes, David Wilson Homes, the Emerson Group/Orbit Developments, Gladman Developments, HIMOR Group, Jones Homes, The Peel Group and Taylor Wimpey UK Ltd. It is also backed by the Greater Manchester Chamber of Commerce. See www.housingthepowerhouse.com/ for further details.

18 According to DCLG live table 122, an average of 7,395 net additional dwellings were provided each year in Greater Manchester over the period 2004-2014

- 4,050,000m^2 of new industrial and warehousing floorspace, which equates to an average of just under 192,900m^2 per annum
- This would be an increase of 28% on the annual average new industrial and warehousing floorspace provided over the period 2004-2014[19]
- It would be 17% higher than the objectively assessed need identified above
- 2,725,000m^2 of new office floorspace, which equates to an average of just under 129,800m^2 per annum
  - This would be an increase of 23% on the annual average new office floorspace provided over the period 2004-2014[20]
  - It would be 14% higher than the objectively assessed need identified above

4.23 The supply of sites identified by the districts would be insufficient to meet these requirements, and additional sites would be needed capable of accommodating:

- 183,200 net additional dwellings[21]
- 1,828,800m^2 of new industrial and warehousing floorspace[22]
- 182,100m^2 of new office floorspace[23]

4.24 Greater Manchester would require an economic growth rate averaging 3.3% per annum in order to deliver Option 3. This would be significantly higher than the 3.0% growth rate that has been forecast for London, and so would be extremely ambitious. Given the inherent economic strengths of London, and its position as one of only a handful of genuinely global cities in the world, it would appear very challenging for Greater Manchester to continually exceed London's growth rate over a period of two decades. If such a level of growth were to be achieved in practice, then this could potentially transform Greater Manchester's future,

19 District monitoring identifies that an average of 151,001m2 of new industrial and warehousing floorspace was provided each year over the period 2004-2014
20 District monitoring identifies that an average of 105,240m2 of new industrial and warehousing floorspace was provided each year over the period 2004-2014
21 Requirement of 336,000 minus identified supply of 152,800
22 Requirement of 4,050,000 plus 20% minus identified supply of 3,031,200 referred to in footnote 8 (i.e. (4,050,000*1.2) – 3,031,200)
23 Requirement of 2,725,000 plus 20% minus identified supply of 3,087,900 referred to in footnote 9 (i.e. (2,725,000*1.2) – 3,087,900)

supporting greater prosperity for residents and businesses, significant investment in new infrastructure, and more opportunities for young people both in terms of jobs and housing.

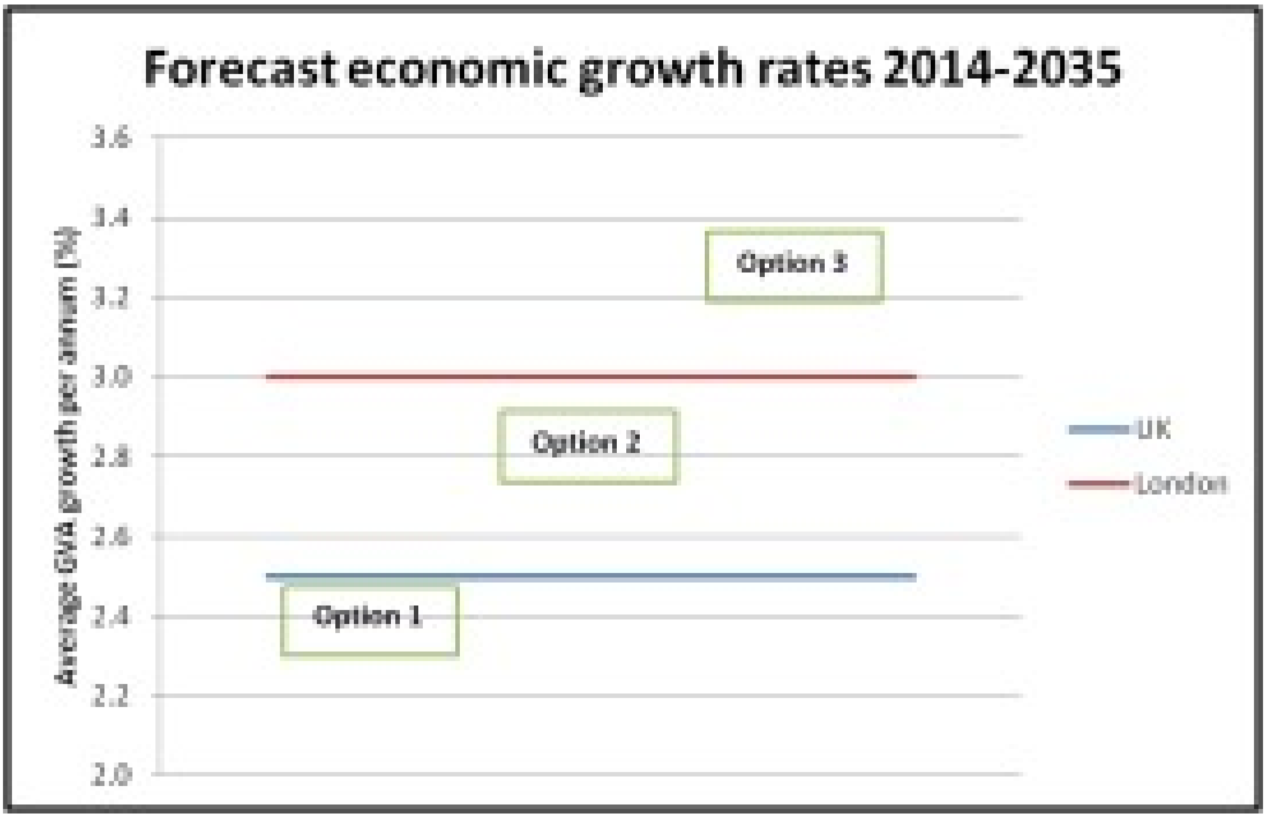
4.25 However, such levels of growth would also be likely to come at a price. In order to accommodate the amount of development identified above, very large areas of land outside the existing urban area would need to be used, including considerable parts of the Green Belt. This could lead to the loss of significant areas of agricultural land, and transform the character of many places across Greater Manchester. There would be major increases in the number of travel movements within, into and out of Greater Manchester, and delivering the necessary transport improvements would be very challenging and could require massive public investment.

Comparing The Options

4.26 This section summarises the key differences between the three options set out above. In addition to the three options presented, there are clearly many other options that would lie between them. Consequently, people may think that a higher level of growth would be more appropriate than is set out in Option 2 but that it should not be as high as under Option 3, whereas others may consider that a lower level of growth than Option 2 should be planned for but not as low as under Option 1.

4.27 The graph below compares the average levels of economic growth over the period 2014-2035 that would be expected under each of the three options with the forecast levels for the UK as a whole and London.

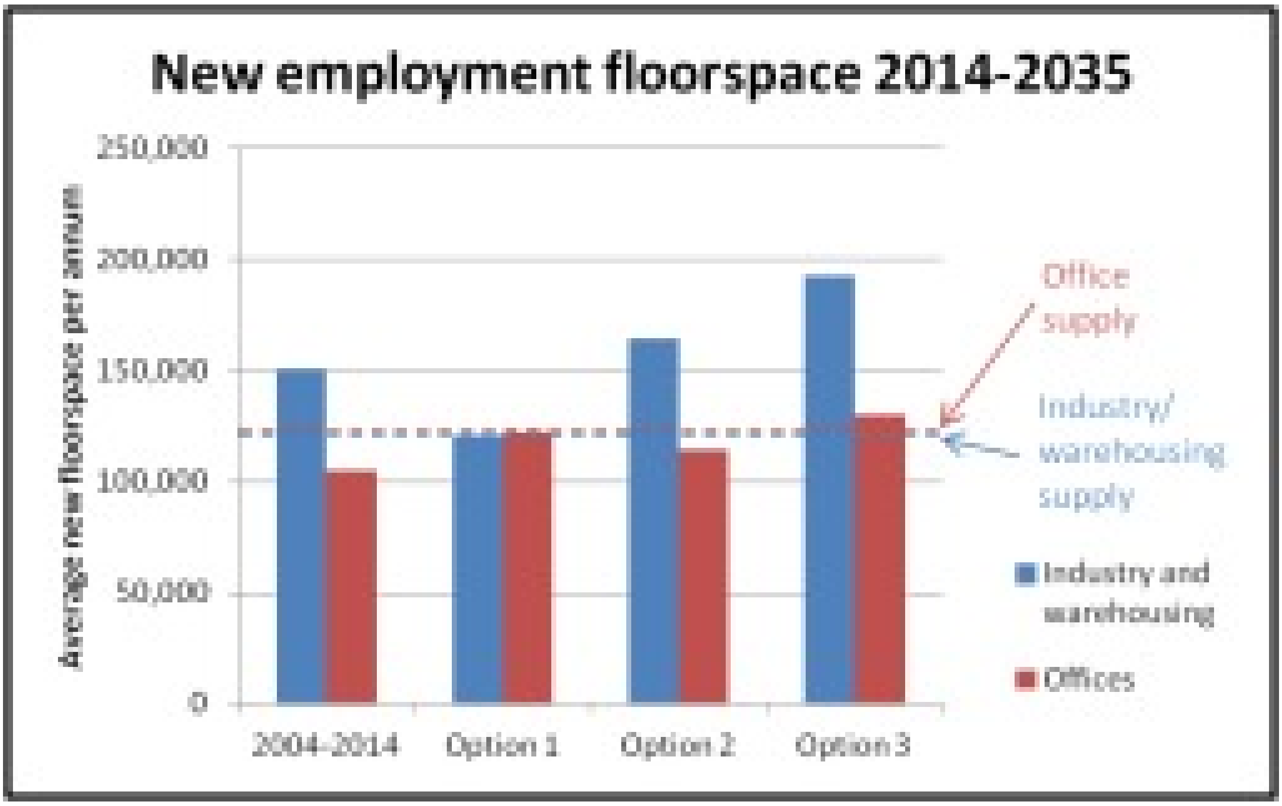
Figure 2



4.28 Option 1 would risk Greater Manchester gradually falling behind the rest of the UK, which could make it increasingly difficult to attract and retain people and businesses. Option 2 would exceed the UK growth rate by quite a significant margin, though would remain below that of London. Delivering this level of growth over a prolonged period would be challenging, but would help to ensure that Greater Manchester prospers in the long-term. The scale of growth under Option 3 would start to close the gap between Greater Manchester and London, but continually delivering such growth rates would be very challenging and would be reliant on the ability to secure levels of investment well above what has been seen in the past.

4.29 A large amount of new employment floorspace would be required under any of the options, as shown below. The columns identify the amount of new floorspace that would need to be constructed under each option, compared to the levels of development seen over the period 2004-2014, and the horizontal lines show how much development would be likely to be delivered on sites that the ten local authorities have already identified.

Figure 3



4.30 The identified supply of sites for new office development is sufficient to meet all of the development requirements under Option 1 and Option 2, and only a small increase would be required for Option 3. Given the importance of office-based sectors in promoting economic growth and prosperity in Greater Manchester, it may be appropriate to support the development of all of the identified sites in each of the options, although some of this may actually be delivered after 2035 depending on the scale of demand.

4.31 The supply of sites for industrial and warehousing development is much tighter. Option 1 is based around that supply, and would result in 20% less new industrial and warehousing floorspace being provided each year than in the recent past, which would be likely to adversely affect the ability of Greater Manchester to compete with other locations for investment. Although such floorspace may accommodate a relatively small proportion of all jobs in Greater Manchester, the businesses that occupy it are vital for supporting a robust economy and Greater Manchester has considerable growth potential in some sectors such as logistics and advanced manufacturing. Thus, there is a strong argument for at least matching the past rates of development, and preferably exceeding them. However, this would require considerably more land to be found for new industrial and warehousing floorspace. Given the site requirements of many occupiers, a significant proportion of this would probably need to be outside the existing urban area, including within the Green Belt.

4.32 The three options involve very considerable differences in the number of additional dwellings that would be provided over the period 2014-2035. This is shown in the table below, which compares the average per annum increases and rates of increase in the three options with that seen in 2004-2014.

Table 1 Net change in dwellings 2014-2035

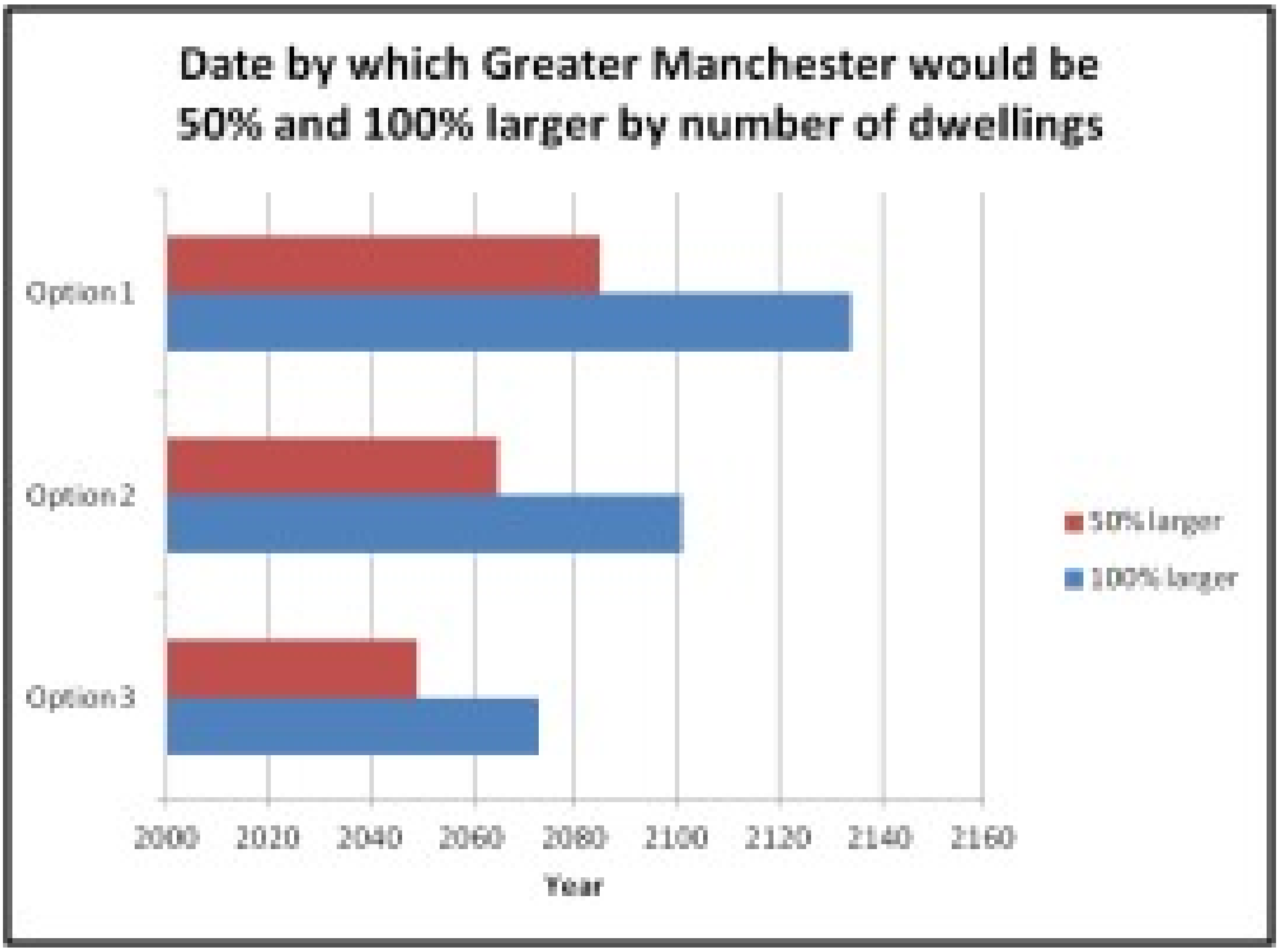
	Average increase per annum	% increase in dwellings per annum
Option 1	7,276	0.58
Option 2	10,350	0.81
Option 3	16,000	1.20
2004-2014	*7,395*	*0.65*

4.33 Option 1 would involve a very small reduction in the average number of additional dwellings provided each year compared to the recent past[24]. Option 2 would involve an increase each year that is 40% higher than the average seen in the previous decade, and the number of new dwellings provided each year under Option 3 would be well over twice the past levels.

4.34 One of the issues that will need to be considered is whether the proposed scale of growth can continue beyond the year 2035. The graph below shows the year by which the number of dwellings in Greater Manchester would have increased by 50% and by 100%, compared to 2014, if the proportionate rate of increase in dwellings under each option continued in the long-term. The very high rate of growth in Option 3 would result in Greater Manchester doubling in size by 2073, and even the more modest increase under Option 2 would lead to a doubling by the end of the century

24 There is a larger difference in the rates of growth, because the same change in dwellings each year will gradually result in a lower % increase per annum as the base figure from which it is calculated rises.

Figure 4



Questions

4.35 The levels of development proposed under each option are summarised in the table below.

Table 2 Total Amount of Proposed Development in Greater Manchester 2014-2035

	Housing		Industry/warehousing (m^2)		Offices (m^2)	
	Total for 2014-2035	Average per annum	Total for 2014-2035	Average per annum	Total for 2014-2035	Average per annum
Option 1	152,800	7,300	2,526,000	120,300	2,573,300	122,500
Option 2	217,350	10,350	3,452,000	164,400	2,399,000	114,200
Option 3	336,000	16,000	4,050,000	192,900	2,725,000	129,800

Question 9

Which option would you prefer and why?

Question 10

Are there any other growth options that you think we should consider?

Please specify the total amount of each type of development that you think should be provided in Greater Manchester over the period 2014-2035.

Question 11

Are there any other advantages or disadvantages of each option that should be highlighted?

5 Finding additional sites for development

5.1 Although the local authorities within Greater Manchester have identified a large number of sites that are considered suitable for new housing and/or employment floorspace, Options 2 and 3 would require additional land to be brought forward for development for housing and industry/warehousing, and Option 3 would also require more sites for new office floorspace. Option 1 would not need any further development sites to be found. This section explains some of the issues that will need to be considered if an option is chosen that requires additional development sites to be identified.

5.2 The location of any new development sites will need to support the strategy set out earlier in this document. For example, as far as possible it will need to maximise the ability to use sustainable modes of transport for journeys, protect and enhance important green infrastructure, support regeneration and address climate change. New sites will also need to be attractive to developers and potential occupiers, and the provision of new/improved infrastructure to serve them must be viable, otherwise they will not be used. This will be particularly important for those sites intended to provide employment floorspace, as they will be in competition for investment with locations elsewhere in the country and beyond.

5.3 Forecasts are able to provide a general indication of the likely distribution of demand between the ten districts within Greater Manchester[25]. However, the distribution of the supply of sites will need to be influenced by a range of other factors, including how well it would support the overall strategy, the outcomes of the 'Deep Dive' work on the Greater Manchester economy, and where suitable sites are located that could meet demand.

Industry and Warehousing

5.4 There would be a significant shortfall in the supply of sites for new industrial and warehousing development under Option 2 and Option 3, which would require further sites to be identified capable of accommodating:

- 1,111,200m^2 of new industrial and warehousing floorspace under Option 2
- 1,828,800m^2 of new industrial and warehousing floorspace under Option 3.

5.5 The table below shows the distribution of the supply of sites that has currently been identified as being suitable for new industrial and warehousing floorspace, and the map shows the supply levels in each ward within Greater Manchester. This would effectively be the distribution of new industrial and warehousing development under Option 1.

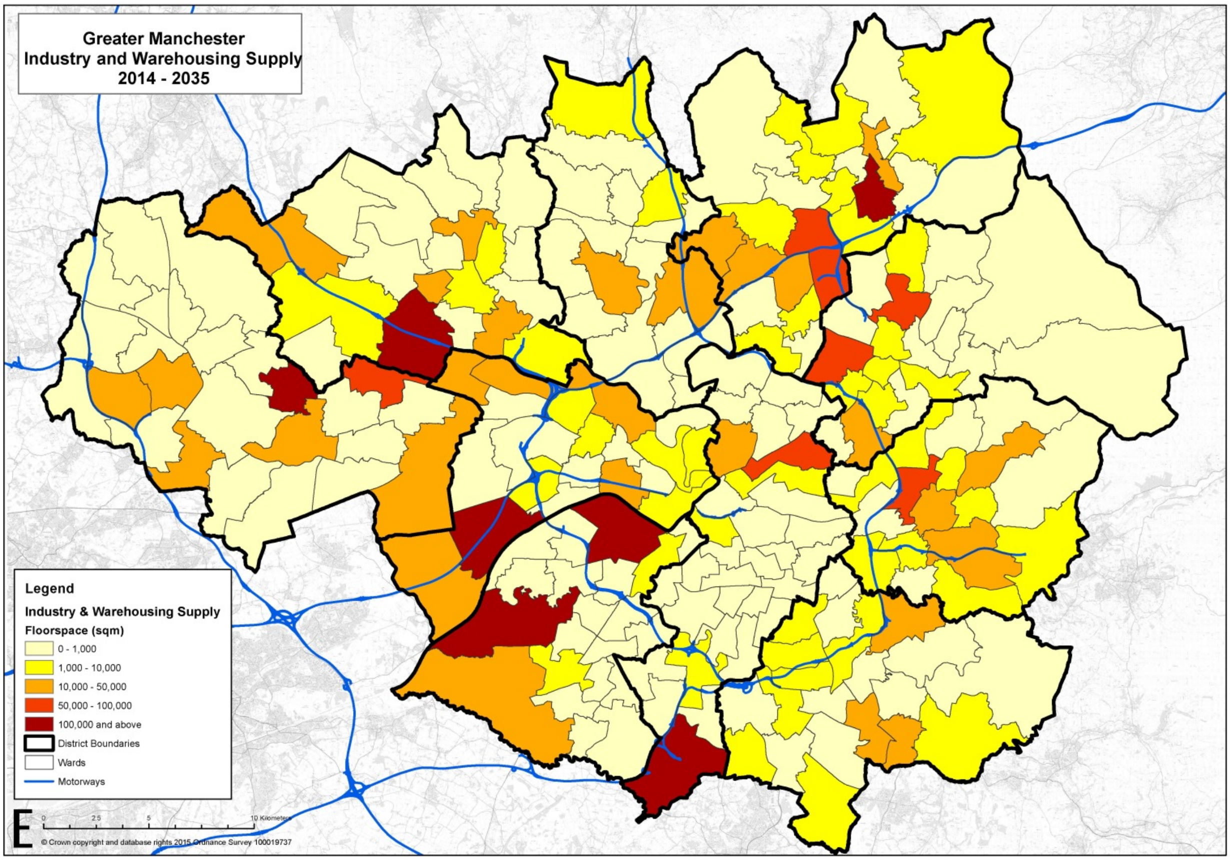
25 For details see: AGMA (November 2015) Economic development needs assessment

Table 3 Identified Supply of Sites for Industry and Warehousing 2014-2035

Area	Floorspace (m^2)[26]	% of Greater Manchester total
Bolton	500,000	16
Bury	64,000	2
Manchester	284,000	9
Oldham	193,000	6
Rochdale	340,000	11
Salford	347,000	11
Stockport	113,000	4
Tameside	154,000	5
Trafford	698,000	23
Wigan	337,000	11
Greater Manchester	3,031,000	100

26 Total may not add up due to rounding. A supply capable of accommodating 3,031,000m^2 of floorspace would be expected to deliver around 2,526,000m^2 in practice, due to the need for a buffer of around 20% for choice and flexibility in the site supply.

Figure 5



5.6 There is a significant variation in the amount of industrial and warehousing supply identified in each district, with Trafford's being more than ten times that of Bury's. Overall, this supply is skewed towards the west/south-west of Greater Manchester, with the four districts of Bolton, Salford, Trafford and Wigan accounting for 62% of the total supply of new industrial and warehousing floorspace whereas the five districts of Bury, Oldham, Rochdale, Stockport and Tameside in the north and east of Greater Manchester provide just 29%. This could result in an uneven pattern of economic growth across Greater Manchester, and could raise concerns about opportunities in the north and east of the area.

5.7 Different businesses will have different requirements in terms of industrial and warehousing floorspace, but the following attributes are often very important for employers when selecting potential sites:

- Value for money
- Certainty and speed of delivery

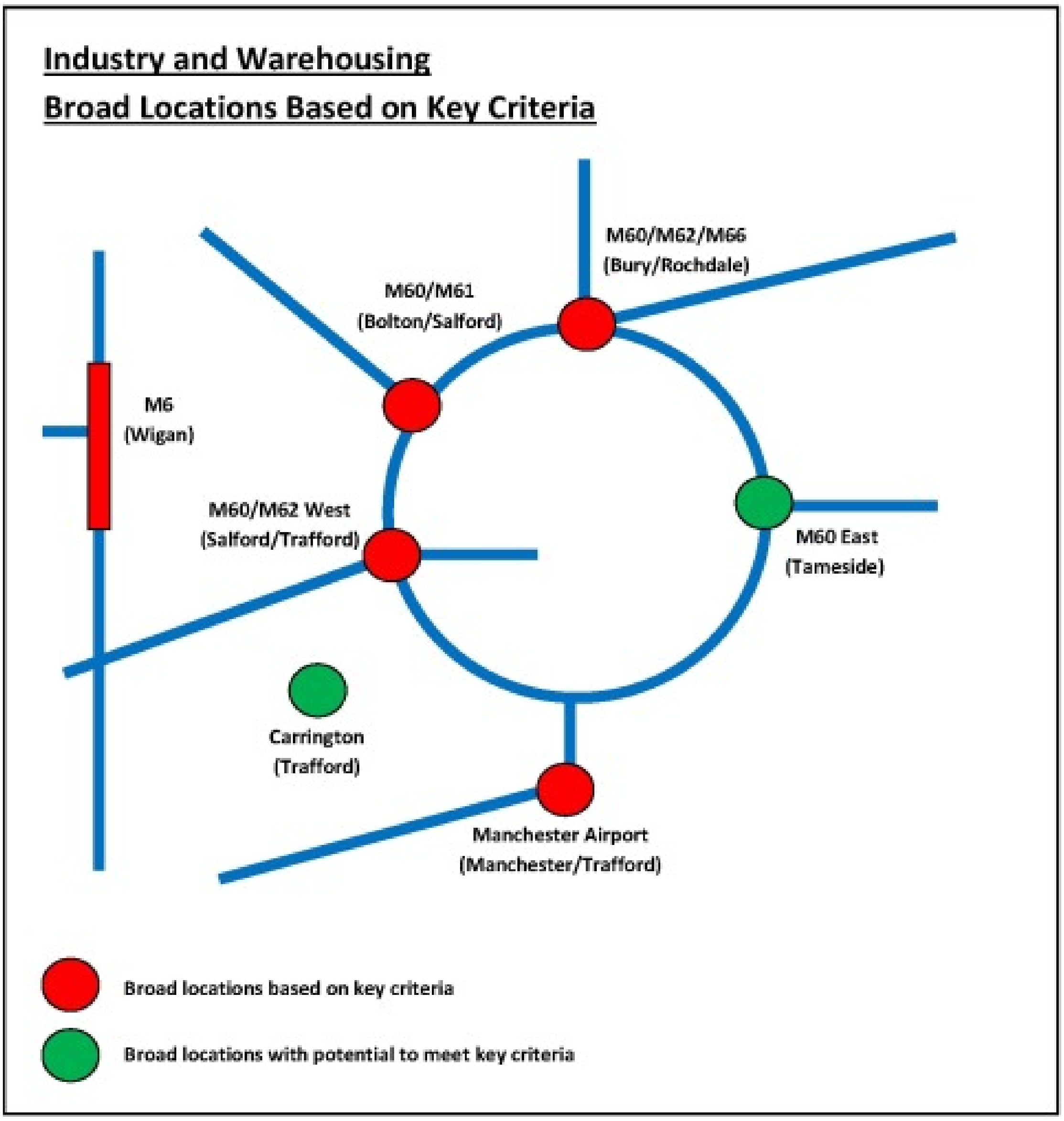
- Transport connections, particularly access to motorways and railways for freight movement
- Access to suppliers and customers
- Access to labour with suitable skills
- Scale of the site, with larger sites able to provide greater flexibility and meet a wider range of needs
- Profile, with a preference for established locations with a good reputation

5.8 Within Greater Manchester, the following locations may have the greatest potential to meet these requirements:

- M60/M62 west (within Salford and Trafford)
- Manchester Airport (within Manchester and Trafford)
- M60/M62/M66 (within Rochdale and Bury)
- M6 corridor (within Wigan)
- M60/M61 (within Bolton and Salford)

5.9 There may also be significant potential in some other locations, such as Carrington (within Trafford) and opportunities opened up by the improvements linked to the Northern Powerhouse along the M60/M62 corridor (within Rochdale, Oldham and Tameside). Sufficient investment in infrastructure would need to be secured to enable them to better meet occupier demand. A wide range of other locations will also have an important role to play, ensuring a good mix of sites across Greater Manchester.

Figure 6



5.10 The locations identified above are therefore likely to provide the best starting point for identifying sites that could help to fill the supply gaps under Option 2 and Option 3. Sites in some of these locations are already included in the land supply identified by districts, such as Port Salford (M60/M62 West), Airport City (Manchester Airport) and Logistics North (M60/M61 Corridor), but there may be further opportunities to increase the supply within and around them. The potential for increasing the supply in the north and east of Greater Manchester also needs to be carefully considered.

Offices

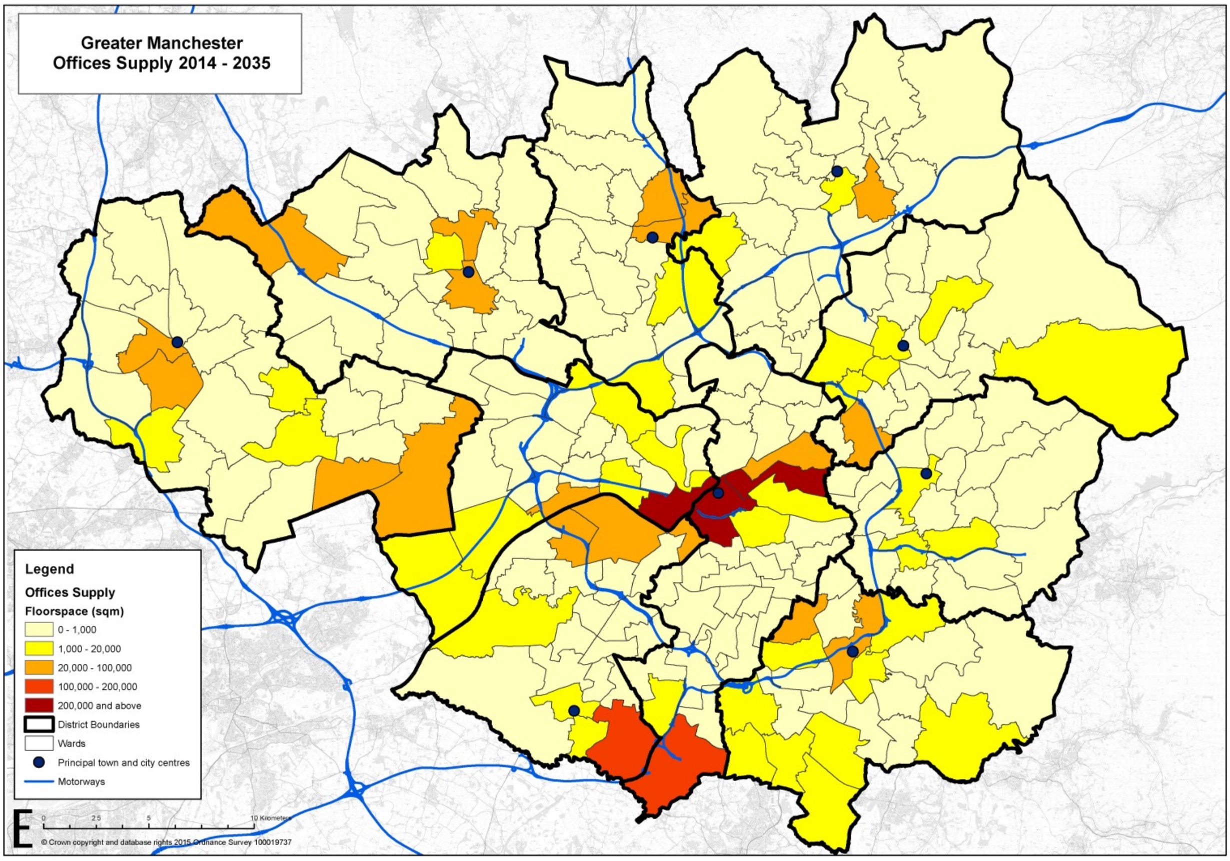
5.11 The table below shows the distribution of the supply of sites that has currently been identified as being suitable for new office floorspace, and the map shows the supply levels in each ward within Greater Manchester.

Table 4 Identified supply of sites for offices 2014-2035

	Floorspace (m^2)[27]	% of Greater Manchester total
Bolton	134,000	4
Bury	117,000	4
Manchester	1,344,000	44
Oldham	73,000	2
Rochdale	71,000	2
Salford	706,000	23
Stockport	158,000	5
Tameside	23,000	1
Trafford	261,000	8
Wigan	200,000	6
Greater Manchester	3,088,000	100

27 Total may not add up due to rounding. A supply capable of accommodating 3,088,000m^2 of floorspace would be expected to deliver around 2,573,000m^2 in practice, due to the need for a buffer of around 20% for choice and flexibility in the site supply.

Figure 7



5.12 Around two-thirds of the supply is located within Manchester and Salford, primarily within the city centre and Salford Quays. This would seem appropriate as the two cities are likely to be the most attractive locations for businesses, and have the greatest potential to secure new office-based jobs in Greater Manchester. The other main concentrations are generally within and around the principal town centres and Manchester Airport, although there are some other areas with quite high supply levels such as Trafford Park. As with industrial and warehousing floorspace, the identified supply of office floorspace is more limited in the north and east of Greater Manchester.

5.13 This supply is more than sufficient to deliver Option 1 and Option 2. A small increase in the supply would be required under Option 3, of around 182,500m2. Given the overall strategy for Greater Manchester, and the locations sought by businesses, the city centre, Salford Quays, Manchester Airport and the main town centres would be the most appropriate locations to meet any supply shortfall.

Housing

5.14 A large supply of sites suitable for housing has already been identified. This could provide around 152,800 additional dwelling across Greater Manchester, which would be sufficient to deliver Option 1. However, there would still be the need to identify additional sites under the other two options, sufficient to accommodate a further:

- 64,550 net additional dwellings under Option 2
- 183,200 net additional dwellings under Option 3

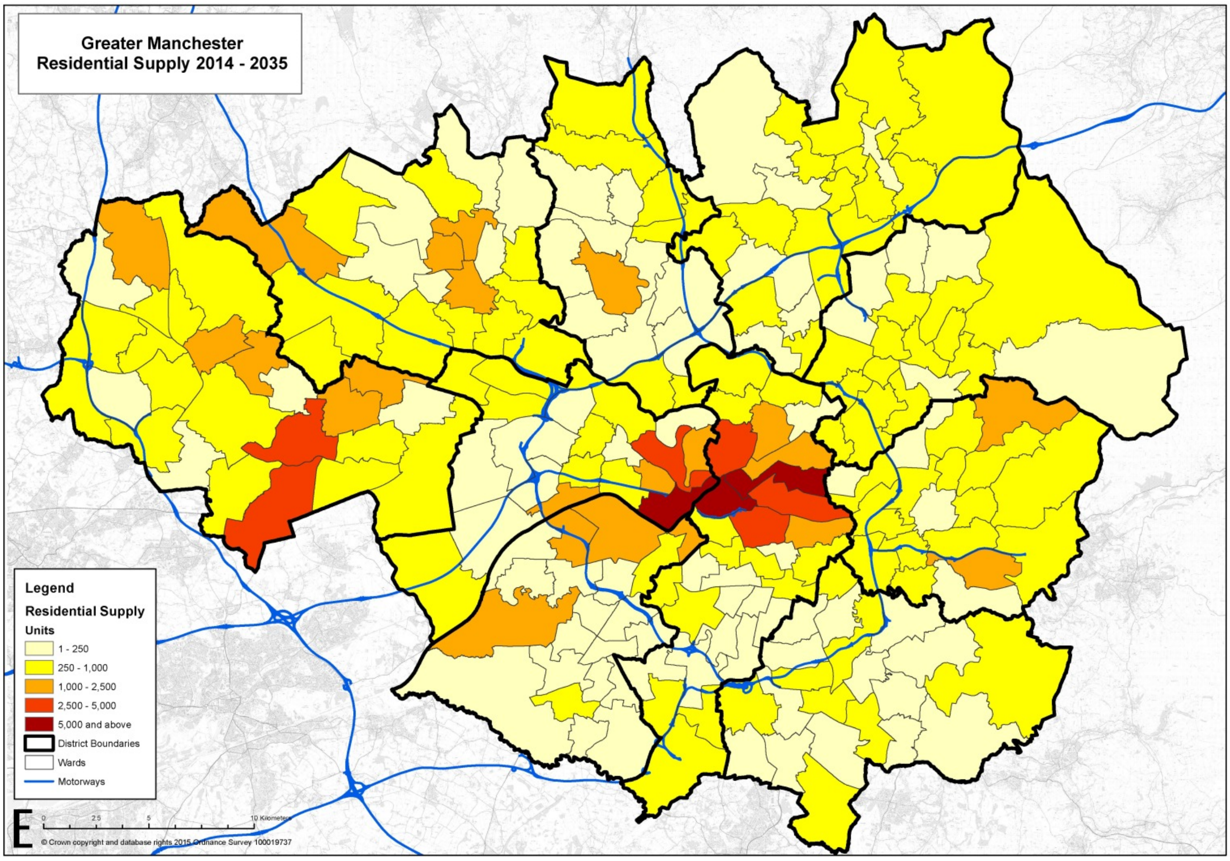
5.15 The table below shows the distribution of the supply of sites that has currently been identified as being suitable for housing, and the map shows the supply levels in each ward within Greater Manchester. This would effectively be the distribution of the net additional dwellings under Option 1.

Table 5 Identified supply of sites for housing 2014-2035

	Net change in dwellings[28]	% of Greater Manchester total
Bolton	11,100	7
Bury	5,100	3
Manchester	43,100	28
Oldham	8,300	5
Rochdale	8,900	6
Salford	29,400	19
Stockport	5,600	4
Tameside	8,800	6
Trafford	9,900	6
Wigan	22,500	15
Greater Manchester	152,800	100

28 Total may not add up due to rounding

Figure 8



5.16 Almost half of the identified supply of additional dwellings is located in Manchester and Salford, with a major concentration within and around the city centre and Salford Quays, but there is also a very large supply in Wigan. The five districts of Bury, Oldham, Rochdale, Stockport and Tameside in the north and east of Greater Manchester provide just under one-quarter of the total identified supply, reflecting a similar focus of identified development opportunities in the centre, south and west of the Greater Manchester as seen for employment floorspace. These broad similarities between the location of sites for housing and employment uses could help to minimise commuting distances, but there may also be benefits in increasing the supply of sites for all uses in the north and east of Greater Manchester in order to secure a more even pattern of development and to ensure that those locations are able to fully benefit from Greater Manchester's economic success.

5.17 The amount of land that would be required for any increase in the identified supply of dwellings would very much depend on the type of housing that it is considered should be provided. The table below shows the enormous difference in the amount of land that would be needed to meet the potential supply shortfall under Option

2 and Option 3. The land requirements only relate to the housing figures, and additional land would also need to be found for associated uses such as schools and recreation.

Table 6 Implications of Meeting a Housing Supply Shortage

	Number of dwellings		Additional land required for housing (hectares)		
	Net Housing requirement 2014- 2035	Shortfall in identified supply	Primarily houses (35 dph)	Mix of houses and apartments (60 dph)	Primarily apartments (100 dph)
Option 2	217,350	64,550	1,844	1,076	646
Option 3	336,000	183,200	5,234	3,053	1,832

5.18 As a comparison, the 2011 Census identifies that Greater Manchester's built-up area currently measures around 63,000 hectares. Some of the sites already identified in the supply, both for housing and employment floorspace, would increase the size of the built-up area. Four of the districts in Greater Manchester are less than 11,000 hectares in total size, and so the additional housing land supply required to deliver Option 3 would be very significant if it included a large proportion of houses.

5.19 It is forecast that around two-thirds of household growth over the period 2014-2035 will be in the form of single-person households, and so the majority of demand is likely to be for smaller dwellings. Around 54% of the current identified supply is in the form of houses, and 46% is apartments. It may therefore be appropriate for a significant proportion of any increase in the housing supply to be in the form of apartments. This would considerably reduce the amount of land required to accommodate the same number of dwellings, as shown in the table above.

5.20 There may be opportunities to secure higher densities on some of the sites that currently form part of the identified housing land supply, and this has already been seen in the last few months on a number of sites. However, some developers may be reluctant to change their plans where they have already secured planning permission for a site, and some locations may be unsuitable for higher densities because of their design context, limited public transport accessibility or infrastructure constraints.

5.21 The main opportunities for additional housing land supply within the urban area are likely to be employment sites, both in terms of those with an existing employment use and allocations for new employment provision that have not been implemented and which have no realistic prospect of being used for their allocated purpose. Some such sites are already included within the housing land supply, but there may be additional opportunities in some locations, particularly where there is a large quantity of low quality business premises. This will have to be balanced against the need to ensure a good supply of cost-effective accommodation for businesses.

Constraints and opportunities

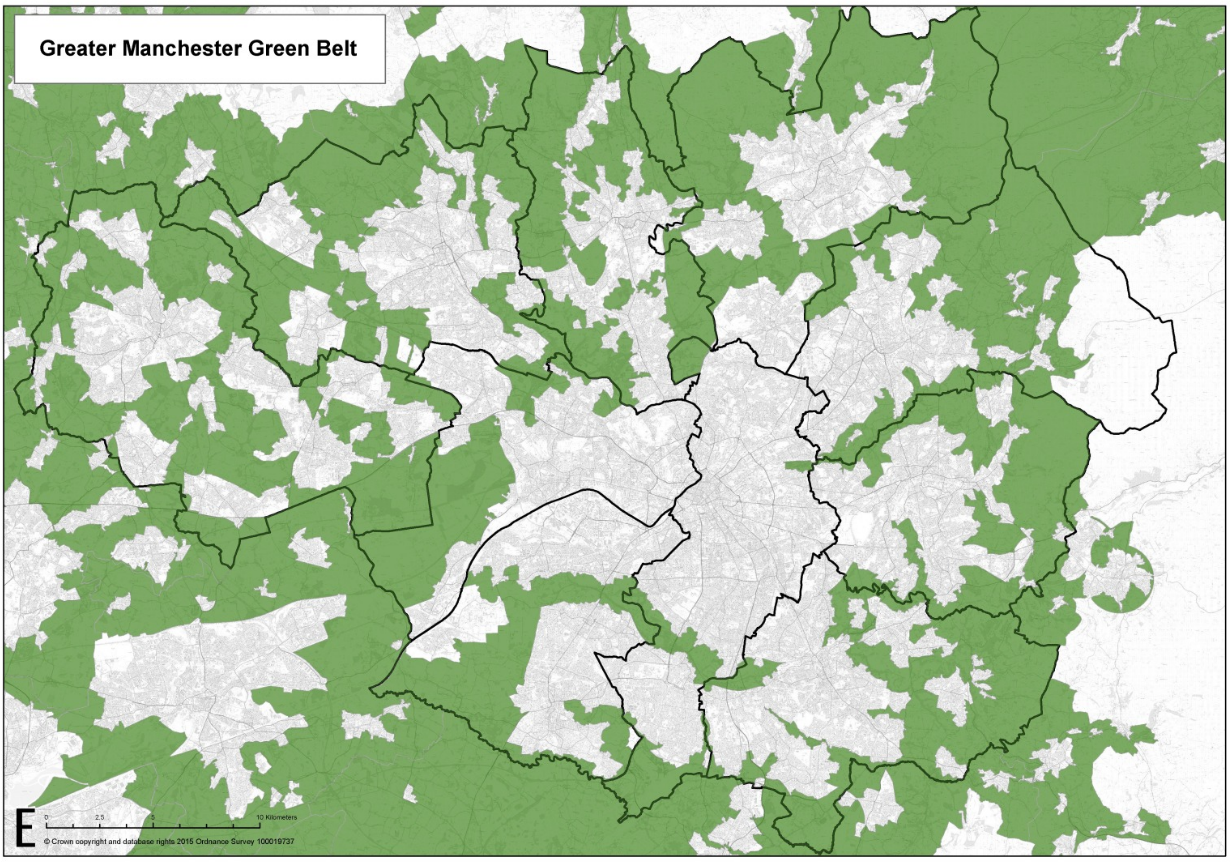
5.22 If the growth option that is chosen requires additional land to be found for development outside the existing urban area, then a wide range of constraints and opportunities will need to be considered. Some of the most significant ones are discussed below.

Green Belt

5.23 Almost half of Greater Manchester is designated as Green Belt[29], including the vast majority of land outside the existing urban area. The largest concentrations of Green Belt are in Rochdale, Bury, Wigan and Bolton, with relatively little in Manchester. The map below shows the boundaries of the Green Belt within and around Greater Manchester.

29 Green Belt is a planning policy designation intended to prevent urban sprawl, and provides no indication of the environmental quality of a site. Not all countryside is Green Belt.

Figure 9



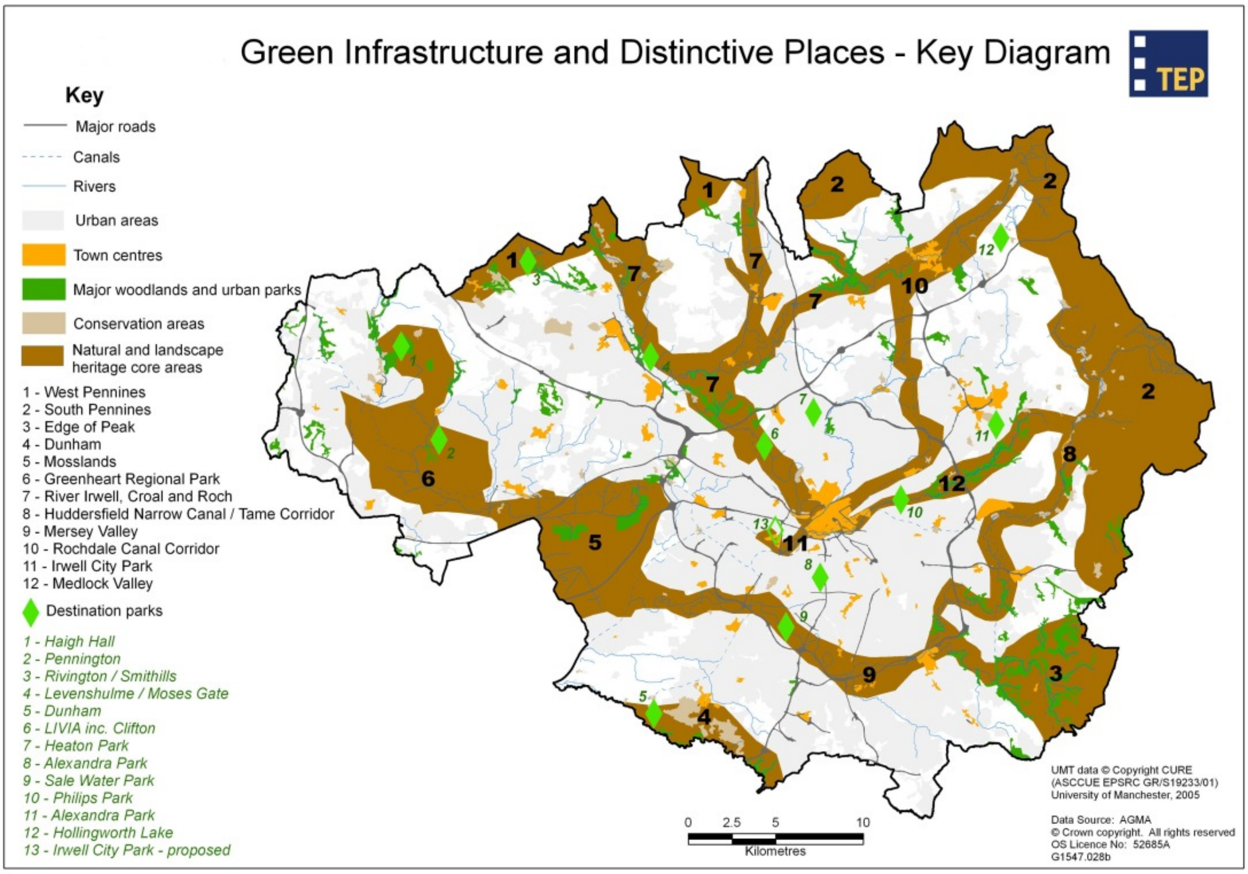
5.24 The Government places a very strong emphasis on protecting the Green Belt, and it would only be appropriate to release sites within the Green Belt for employment floorspace or housing in exceptional circumstances. However, if there is no alternative, then the development of parts of the Green Belt may be preferable to losing other areas of open land that make a much more positive contribution to the identity, character and quality of place of Greater Manchester.

Green Infrastructure

5.25 'Green infrastructure' consists of the green and blue spaces that have multiple social, economic and environmental benefits, such as the countryside, parks, rivers, canals, trees and private gardens. The map[30] below shows some of the more significant areas of green infrastructure, both within and outside the Green Belt, that are critical to conserving or creating a distinctive sense of place.

30 TEP et al (September 2008) *Towards a Green Infrastructure Framework for Greater Manchester: Summary Report*, p.7

Figure 10



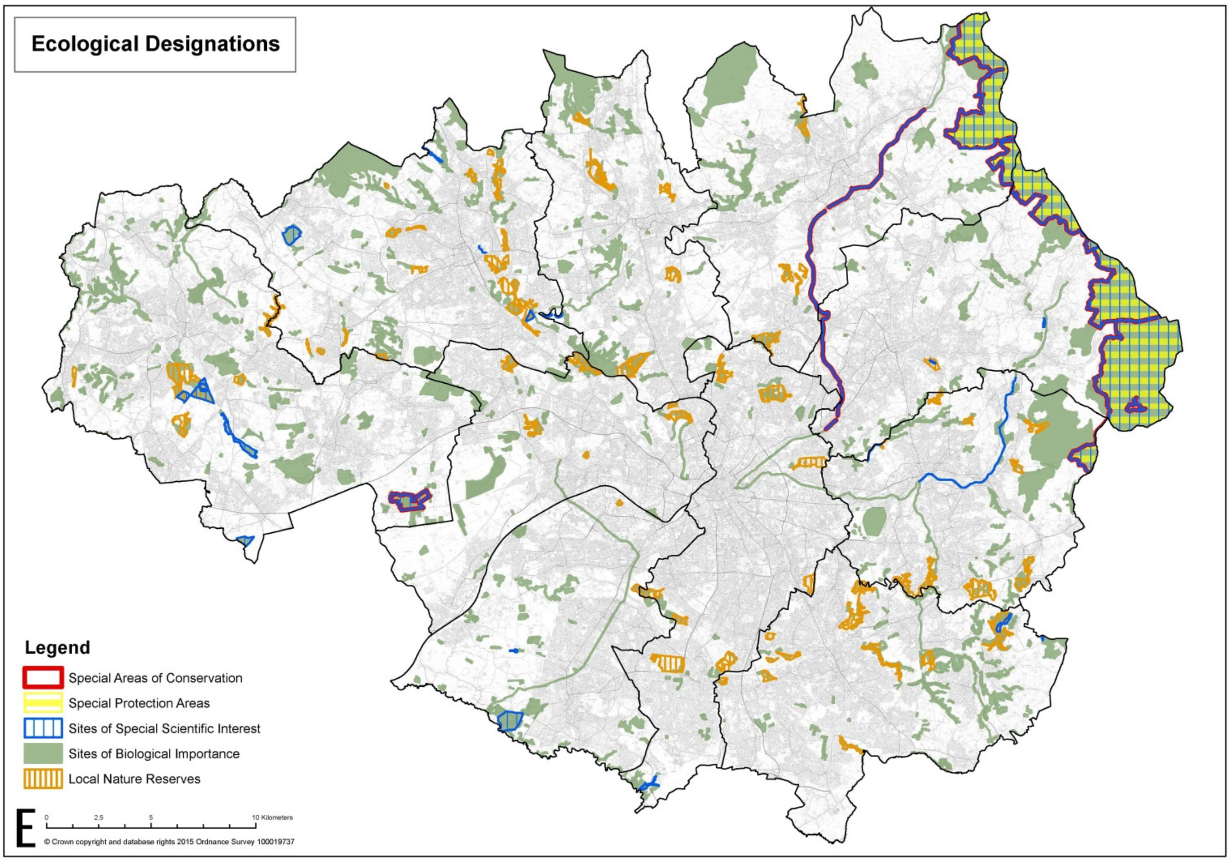
5.26 These core areas of green infrastructure are spread throughout Greater Manchester, but are generally focused around the Pennines on the edge of the urban area, the main river valleys, and the mosslands. Although there may be some development opportunities within these locations, it would be expected that the focus would be on protecting and enhancing their green infrastructure functions, as this will be vital to ensuring that Greater Manchester is environmentally sustainable and a good place to live.

Ecology

5.27 The green infrastructure network has a very important ecological function, providing habitats for plants and animals, and enabling them to move around Greater Manchester. This contributes to the attractiveness of places, and access to wildlife can also enhance health. The location of new development should therefore avoid existing wildlife sites, provide new habitats, and enable better links to be made between such sites. The map below shows the areas in Greater Manchester that are currently protected by a nature conservation designation.

The areas protected at the European level are focused mainly along the north-eastern edge of Greater Manchester, with other designated sites dispersed across the area.

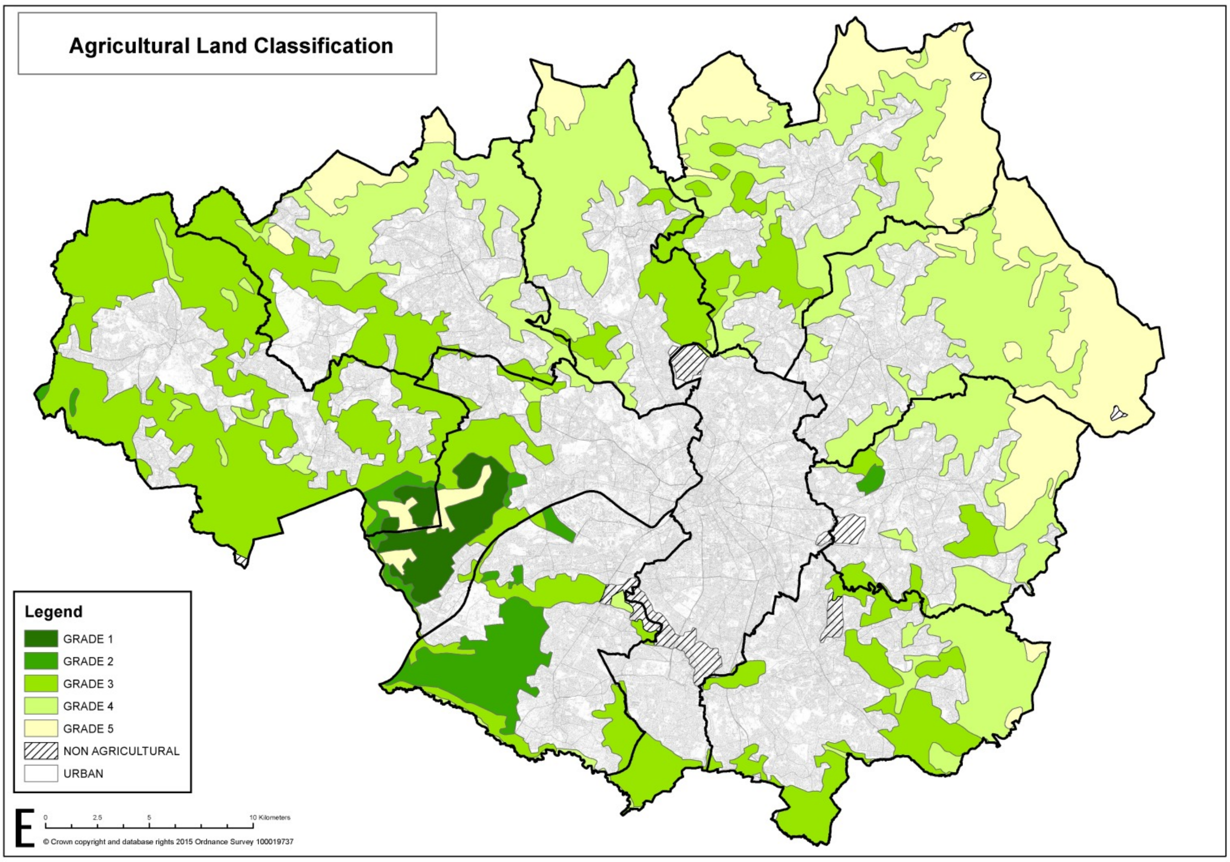
Figure 11



Agricultural land

5.28 If there is a need to develop some of the land outside the existing urban area, then there is a significant chance that this will involve the loss of agricultural land, and poorer quality land should be used wherever possible. The map below provides a general indication of agricultural land quality across Greater Manchester, using data from Defra, with grade 1 being the highest quality.

Figure 12

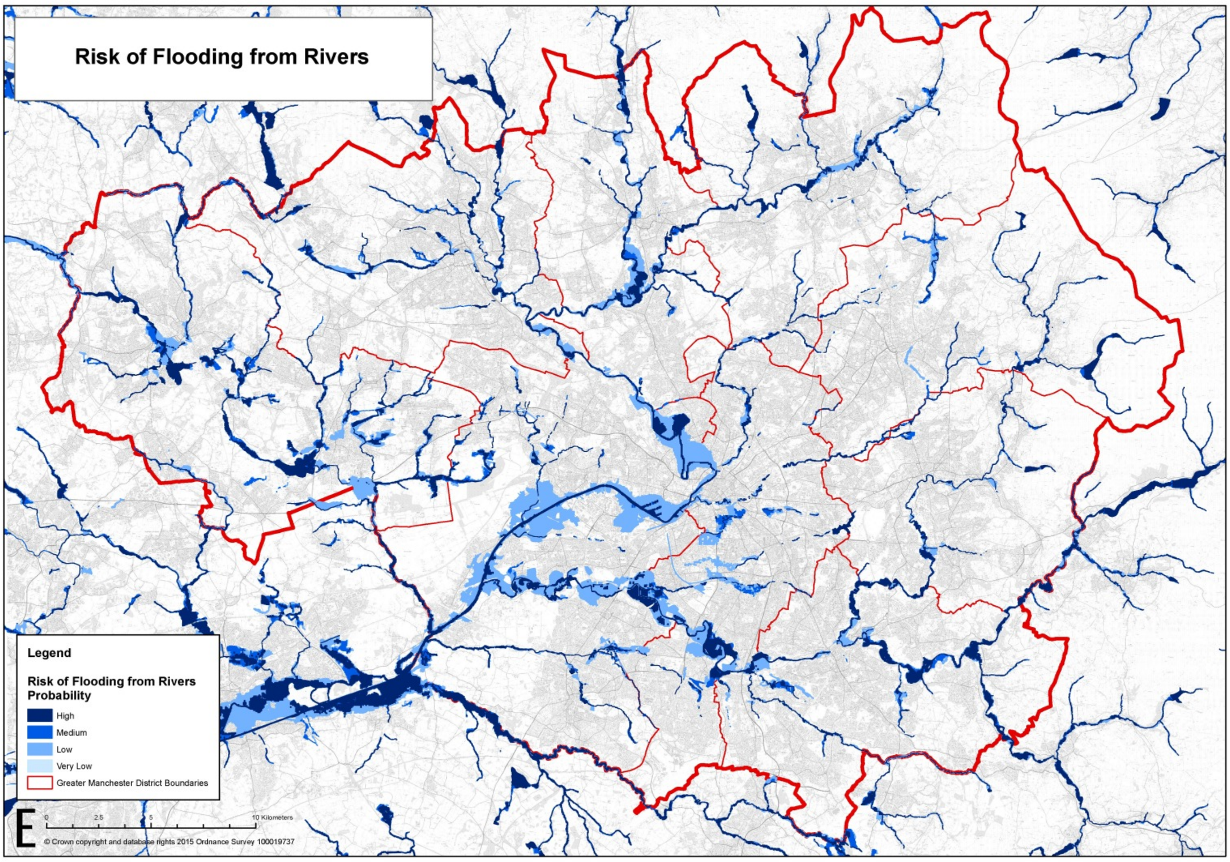


5.29 Greater Manchester has relatively little grade 1 and grade 2 agricultural land. Although the vast majority of food purchased in Greater Manchester will not be grown here, there could be benefits in retaining the potential for agricultural activity in the long-term. This may become increasingly important at the national level as climate change and seawater inundation are likely to reduce the productivity of agricultural land in some other parts of the country. The higher grade agricultural land is located in the west of Greater Manchester, with relatively little in the north and east, though there is still some agricultural activity in those locations.

Flood risk

5.30 The development potential of some locations, both within and outside the existing urban area, will be adversely affected by flood risk. The map below shows the areas in and around Greater Manchester at risk of flooding from rivers, using Environment Agency data. The high risk areas have a greater than 1 in 30 chance of flooding in any given year, the medium risk areas a chance between 1 in 30 and 1 in 100, the low risk areas a chance between 1 in 100 and 1 in 1,000, and the very low risk areas a chance less than 1 in 1,000. The areas at risk are relatively small compared to the overall land area within Greater Manchester, and quite dispersed, although there are some concentrations along the River Irwell, Manchester Ship Canal and River Mersey. In addition to flooding associated with rivers, surface water flooding will also be an important consideration.

Figure 13



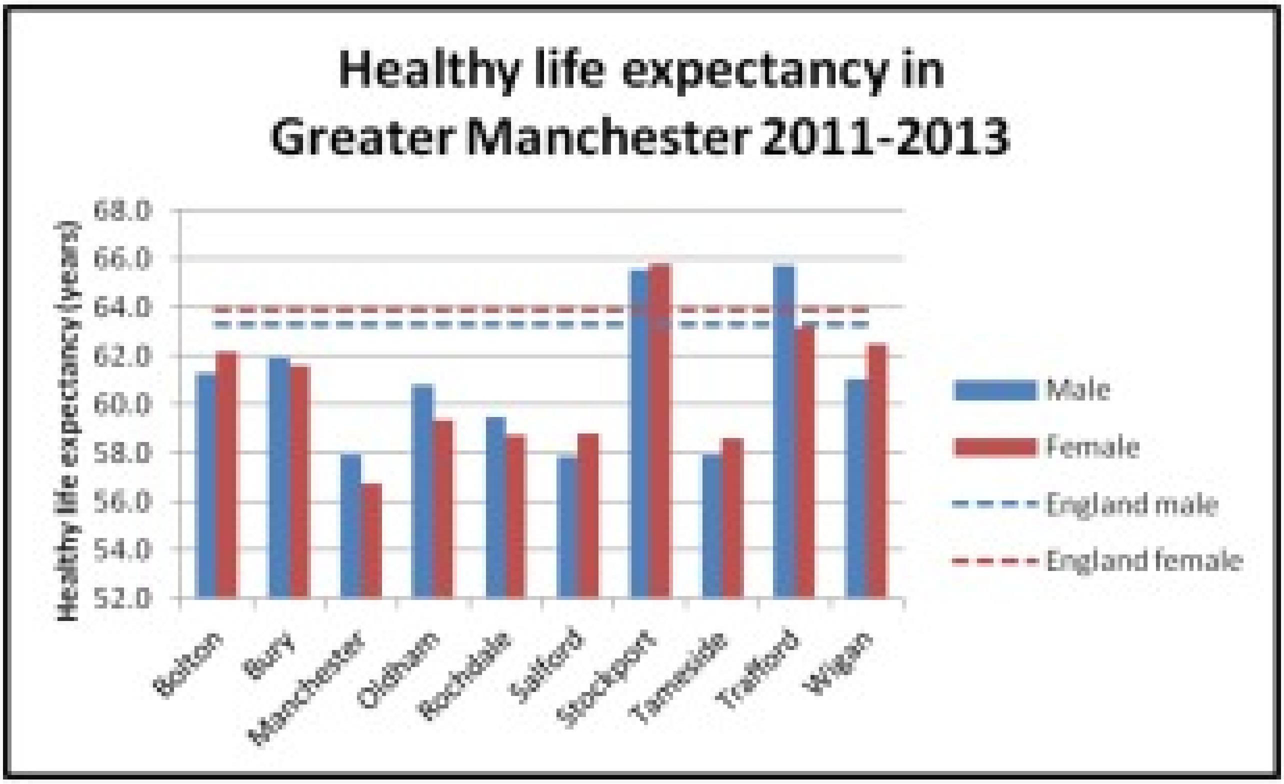
Health

5.31 Poor health is a major problem across large parts of Greater Manchester, and someone living in Greater Manchester is 16% more likely to die in any year than the national average[31]. Following the Memorandum of Understanding signed between Greater Manchester and Government in February 2015, Greater Manchester is developing an ambitious programme of Health and Social Care reform focused on tacking the financial challenge confronting the health and social care economy, which is facing an estimated financial deficit of c£2bn by 2020/21. At the same time as these unprecedented fiscal challenges, health inequalities across Greater Manchester have never been so significant. Other than Trafford and Stockport, the life expectancy of both males and females in all regions of Greater Manchester is below the national average. Healthy life expectancy in

31 Data published by the Office for National Statistics shows that Greater Manchester had a standardised mortality ratio (SMR) of 116 in 2014 compared to a figure of 100 for England and Wales

parts of Greater Manchester is as low as 55 years. Seven of the ten Greater Manchester areas have significantly higher levels of internal inequalities in life expectancy than the England average. We must address these issues if we are to achieve our ambition for every Greater Manchester resident to be able to contribute to and benefit from the economic growth of the conurbation.

Figure 14



5.32 Through the reform of Health and Social Care provision we aim to:

- Improve the health and wellbeing of all of the residents of Greater Manchester from early age to the elderly, recognising that this will only be achieved with a focus on prevention of ill health and the promotion of wellbeing. We want to move from having some of the worst health outcomes to having some of the best

- Close the health inequalities gap within Greater Manchester and between Greater Manchester and the rest of the UK faster

- Deliver effective integrated health and social care across GM Greater Manchester

- Continue to redress the balance of care to move it closer to home where possible

- Strengthen the focus on wellbeing, including greater focus on prevention and public health

- Contribute to growth and to connect people to growth, e.g. supporting employment and early years services

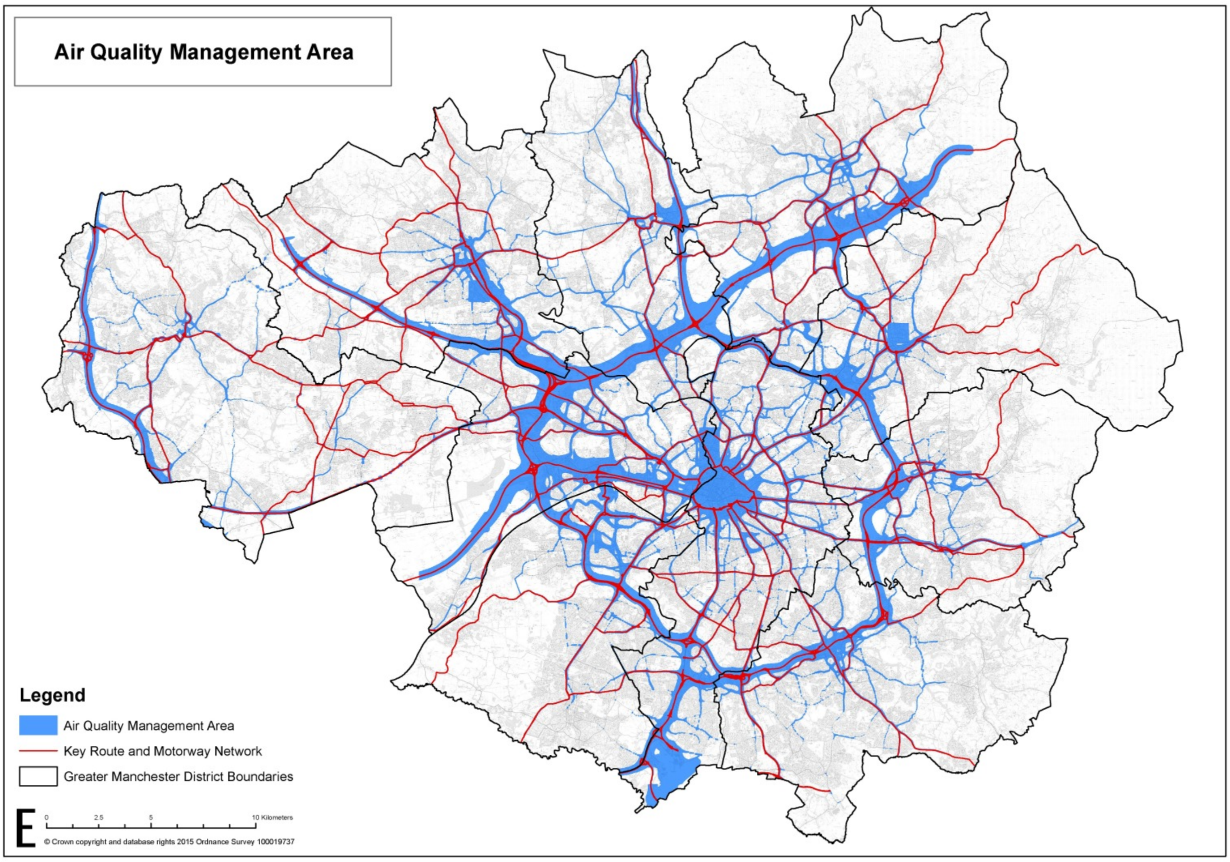
- Forge a partnership between the NHS, social care, universities and science and knowledge industries for the benefit of the population

5.33 Addressing health and social care challenges is a core priority for Greater Manchester, and it will be essential that the Greater Manchester Spatial Framework supports this. Care will therefore need to be taken to ensure that the location and design of new development enables health improvements, for example by supporting enhancements to the green infrastructure network, enabling healthier lifestyles, and addressing poor air quality.

Air Quality

5.34 Tackling poor air quality will be vital to addressing health problems. The map below shows the air quality management area in Greater Manchester, where air pollution is at its worst.

Figure 15



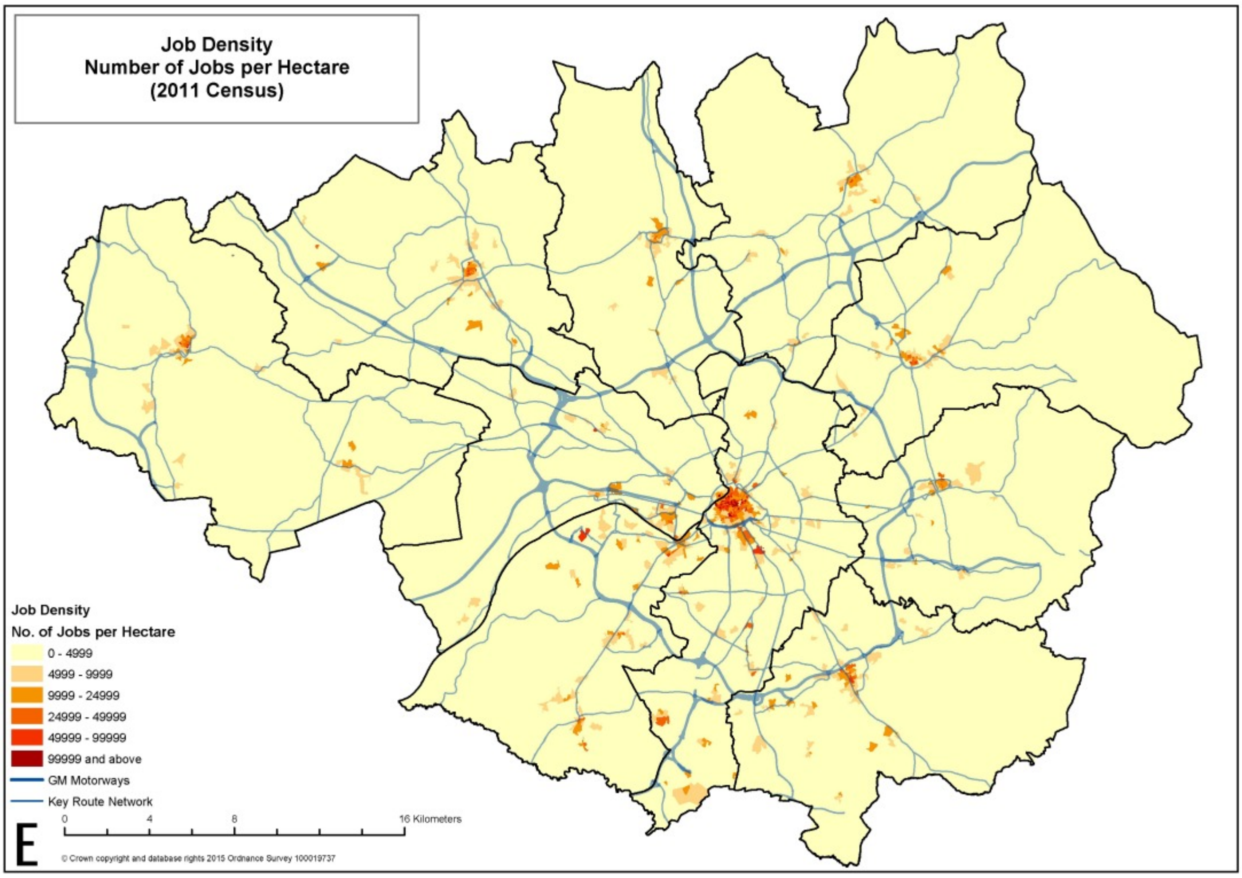
5.35 A major contributor of air pollution is road traffic, and it is clear from the above map that the worst air quality is around the motorway network.

Travel and Transport

5.36 Given the problems of traffic congestion and air pollution within Greater Manchester, it will be important that new development is carefully located so as to minimise the need to travel and enable people and freight to move around using less polluting forms of transport.

5.37 One of the most important considerations will be the relationship between the location of employment opportunities and where people live. The location of new employment floorspace will need to have regard to the main concentrations of population, and the main locations for new housing will need to relate well to the areas with large numbers of jobs. The map below shows those parts of Greater Manchester with the highest density of jobs. The main concentrations are within and around the city centre, Salford Quays, the principal town centres and Manchester Airport. There are some other smaller clusters of high job density spread across Greater Manchester, primarily in the south.

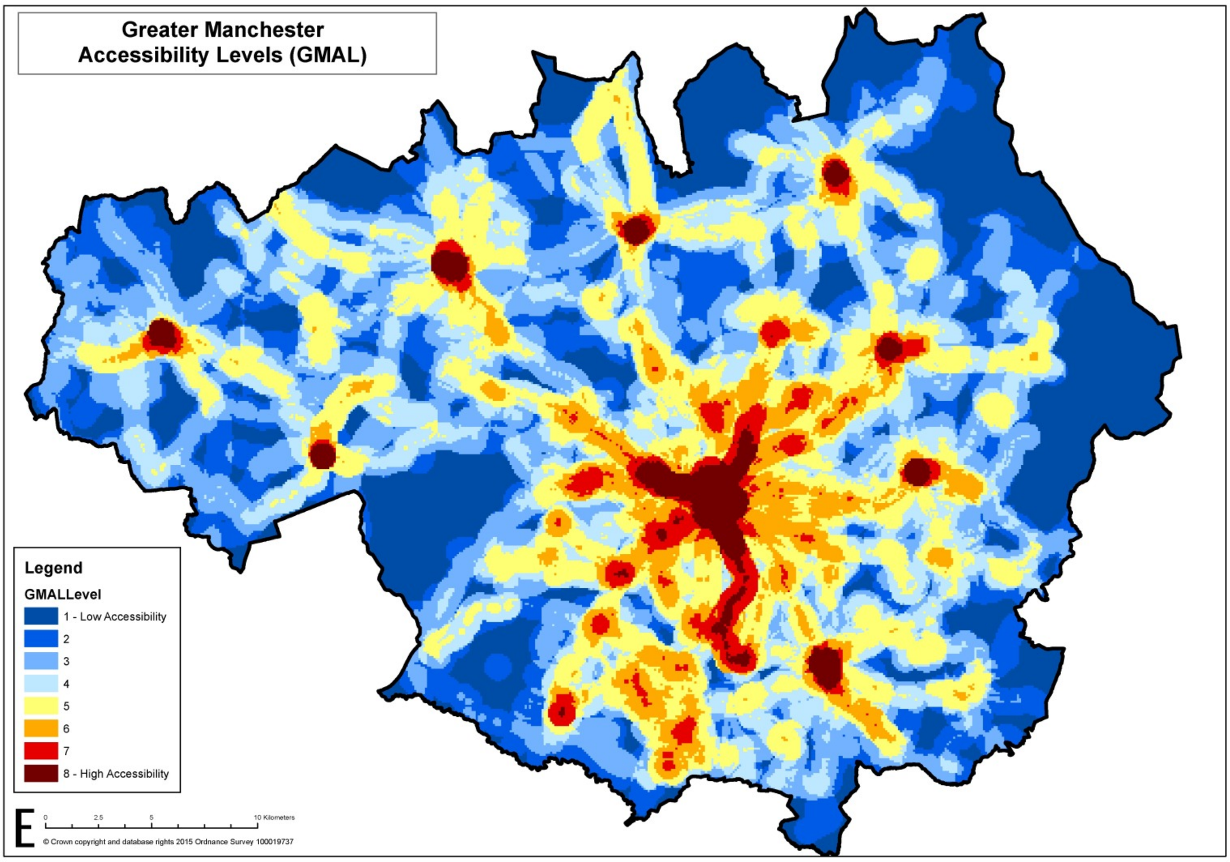
Figure 16



5.38 Where travel cannot be avoided, then it should ideally be by more sustainable modes such as walking, cycling and public transport. The next map provides an indication of the relative accessibility by public transport of different locations across Greater Manchester, using the GMAL measure[32].

32 GMAL (Greater Manchester Accessibility Levels) is a measure of the accessibility of a location by all types of public transport. It is a measure that takes into account both the proximity of the bus stops, tram halts and train stations and the frequency of services using the stops/halts/stations. In addition, 2.5 is added to the score if the location lies within a Local Link Area.

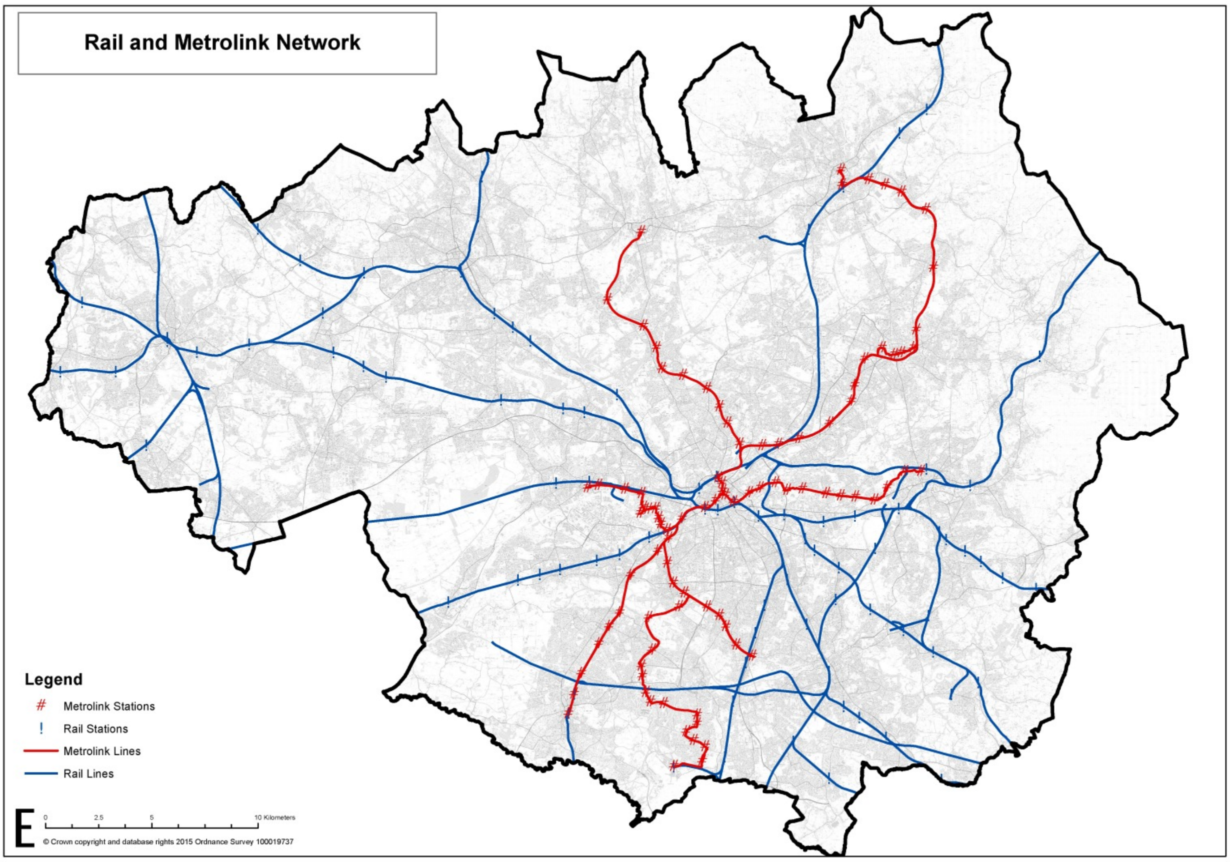
Figure 17



5.39 As would be expected, the highest levels of accessibility are within and around the city centre and main town centres. Locating new development in such locations therefore offers the greatest potential to minimise car use, but these are also generally the places where there is the greatest pressures on land resources. If development outside these core locations is considered appropriate, then major investment in public transport is likely to be required, otherwise it may lead to a significant increase in traffic congestion and air pollution. Significant improvements to local facilities and services may also be necessary so as to minimise the need to travel.

5.40 If additional sites need to be found to accommodate a large amount of new housing, then it may be advisable to focus as much of this as possible around key public transport nodes. Higher densities may be appropriate in such locations in order to maximise the number of people who are able to take advantage of the good public transport access, but this may need to be complemented by significant improvements in the capacity and frequency of public transport services. The following map shows the locations of the existing rail stations and Metrolink stops, which perhaps provide the best opportunities, although some of them are partly surrounded by Green Belt.

Figure 18



5.41 Although it will be important to enable people to travel by public transport, cycling and walking as far as possible, new development will generate some road traffic. This could be particularly significant for some types of development, such as logistics. The diagram below is taken from a recent Highways Agency report[33], and shows the level of delays on the main part of the motorway network in and around Greater Manchester.

33 Highways Agency (April 2014) South Pennines Route Strategy Evidence Report

Figure 19

5.42 Delays on the motorway network are amongst the worst in the country along the M62/M60 and its junctions with the M61 and M602. Most of this part of the network is currently being transformed into a smart motorway, but more radical measures may be required if the scale and location of new development in Greater Manchester results in more traffic using these motorways. This could require very considerable public and private investment.

Infrastructure

5.43 Although sites outside the urban area may appear more developable because they are perceived as a blank canvas, they often face significant infrastructure constraints that could impact on the realism of bringing them forward. Consequently, not all undeveloped sites will be feasible for housing or employment floorspace.

5.44 If significant areas of land outside the existing urban area need to be released for development, then it is likely that a range of mechanisms will have to be used to capture the associated increase in land value in order to fund the infrastructure required to support their development. This may need to include the use of powers similar to those used to deliver New Towns, as well as the Community Infrastructure Levy, planning obligations and/or other financial levies

Type of sites

5.45 In order to be as attractive as possible to potential occupiers, any new sites for industry and warehousing that need to be located outside the urban area should be very large. This would help to provide them with the profile necessary to attract new investment to Greater Manchester, as well as enabling a wider variety of uses to be accommodated and a more focused approach to infrastructure improvements. Consequently, it is likely that any supply gap for industry and warehousing would primarily be met in a relatively small number of locations.

5.46 In terms of housing, there is a range of approaches that could be taken if new sites need to be found outside the existing urban area. One approach is to gradually expand existing settlements, which may enable new development to be better integrated into the urban area and to utilise existing infrastructure rather than requiring new provision. It may also enable the impacts of new development to be spread across many areas rather than being concentrated in a small number of locations. However, this approach could impact on the character of a large number of neighbourhoods and lead to urban sprawl, with the continuous outward expansion of the existing urban area. Very careful design would be required to ensure that new developments are integrated into existing communities rather than effectively being separate to them.

5.47 An alternative approach would be to focus on the development of a small number of new settlements. This would provide an opportunity to design major new areas of development from scratch in as sustainable way as possible, with a careful balance of housing, employment floorspace, local facilities and open space, as well as the greenest possible infrastructure. However, there is a risk that new settlements could simply function as commuter villages if they are poorly located and designed, and the infrastructure costs associated with them could be very substantial.

5.48 In practice, a combination of approaches may be appropriate, with a very strong focus on urban regeneration, complemented by the release of land outside the existing urban area only in the most sustainable locations, which may involve urban extensions in some areas and new settlements in others. This will require a careful balance between protecting sites that are important to local communities, for example because of their ecological or recreation value, whilst also ensuring that new development sites are viable, attractive to potential residents/businesses, and reduce reliance on the private car.

Question 12

Are there any other important constraints and opportunities that we should take into account when identifying and assessing new sites for housing and employment floorspace?

If yes, what are they?

Question 13

Do you think that any of the identified constraints and opportunities are more important than others?

If yes, which are more important and why?

Question 14

Having regard to the identified or new constraints and opportunities, are there any particular sites or locations that you think would be suitable for providing new housing or employment floorspace?

If yes where are they?

If you have a site you would like to be considered for the GMSF please enter details by Monday 11 January 2016 on our call for sites map here: http://mappinggm.org.uk/call-for-sites/development-sites.htm

Question 15

If new housing needs to be provided outside the existing urban area, do you have a preference for new settlements, a small number of major urban extensions, or a larger number of smaller urban extensions?

Question 16

Do you have any comments about the background papers supporting the growth options?

If yes could you provide us with your comments on each paper below.

- Strategic Options Background Paper 1: Area of Assessment
- Strategic Options Background Paper 2: Economic Development Needs Assessment
- Strategic Options Background Paper 3: Objectively Assessed Housing Need
- Strategic Options Background Paper 4: Infrastructure and Environment Paper
- Strategic Options Background Paper 5: Integrated Assessment

These documents are available to view and comment on at https://gmsf-consult.objective.co.uk/portal

Appendix A Identification of options

A.1 Two separate reports, published alongside this options document, have been produced in order to inform the identification of the appropriate scale of development that Greater Manchester should be planning for:

- Objectively assessed housing need
- Economic development needs assessment

A.2 These reports consider a wide range of different projections, forecasts and scenarios, based on different assumptions around variables such as economic growth, migration and household formation.

A.3 It would be extremely complicated to develop options around each of the projections and forecasts that are discussed in the two reports, given their number, and so this options consultation document focuses on three quite different options that best enable an appreciation of the choices that Greater Manchester faces in terms of the amount of development for which it should be planning. These options inevitably involve some simplification compared to the modelling that has informed them. This section explains how each option relates to the various projections and forecasts.

Option 1

A.4 Option 1 is based around the current development land supply that has been identified by districts. This is considered to be broadly consistent with existing planning policies in force in each district, and avoids any significant development in the Green Belt or on important open land. Consequently, it is not derived from any specific projection or forecast.

A.5 In terms of the various forecasts that have been considered, it bears the most similarity to the 2014 Greater Manchester Forecasting Model (GMFM), produced by Oxford Economics on behalf of the Association of Greater Manchester Authorities.

A.6 In terms of demographics, the 2014 GMFM uses the same birth and death rates as the 2012-based sub-national population projections produced by the Office for National Statistics (ONS), but then models migration using a range of economic variables such as differentials in house prices, wages and unemployment. The 2014 GMFM assumes that net international migration to the UK will be lower than identified in the ONS projections. It also utilises household representative rates from the 2011-based sub-national household projections produced by the Department for Communities and Local Government, although more recent 2012-based household projections are now available.

A.7 The 2014 GMFM would indicate the need for 133,542 net additional dwellings over the period 2014-2035, which equates to an average of 6,359 per annum. The potential supply of around 152,800 net additional dwellings that has been identified by the districts would therefore be sufficient to meet the 2014 GMFM forecast. All of the other population and household growth scenarios that have been modelled, including the official DCLG projections, would result in a dwelling requirement that exceeds the aforementioned identified supply.

A.8 The 2014 GMFM produces forecasts of the net change in office and industrial/warehousing floorspace, but the GMSF will identify gross requirements that relate to the new floorspace that should be provided (i.e. not taking into account potential future losses of existing floorspace). There is no widely accepted methodology for translating forecast net change in employment floorspace into gross requirements for new employment floorspace, and so it has been assumed that the forecasts in the 2014 GMFM are equivalent to a continuation of past employment floorspace development rates over the period 2004-2014, given it is a baseline forecast based on past trends.

A.9 Based on local authority monitoring, an average of 151,000m^2 of new industrial and warehousing floorspace and 105,240m^2 of new office floorspace was provided each year over the period 2004-2014. It is therefore assumed that the following levels of new development would be required over the period 2014-2035 in order to deliver the 2014 GMFM forecast:

- 3,171,000m^2 of new industrial and warehousing floorspace
- 2,210,000m^2 of new office floorspace

A.10 Thus, the existing land supply identified by the districts would be more than sufficient to meet the office floorspace requirement, but insufficient to meet the industrial and warehousing floorspace requirement. In order to support the delivery of the 2014 GMFM forecast, without the identification of additional sites, there would need to be a greater emphasis on retaining and improving existing employment premises than might otherwise be the case. The 2014 GMFM forecasts an average growth rate of 2.5% in the Greater Manchester economy over the period 2014-2035, but with the constrained industrial and warehousing land supply it might be expected that a slightly lower growth rate would be achieved in practice.

Option 2

A.11 Option 2 is based around the objectively assessed need that has been identified in the two reports. In terms of housing, this scenario[34] utilises the following key assumptions, which are modelled at the district level, and uses a base date of 2012:

- Birth and death rates from the ONS 2012-based sub-national population projections
- Internal (within the UK) migration rates, both inflows and outflows, from the ONS 2012-based sub-national population projections
- Ten-year average international migration inflows and outflows (absolute numbers), based on the period 2002-2012 and calculated from ONS mid-year estimates, applied to the period 2012-2019, followed by a gradual return to the ONS international migration assumptions which are applied from 2023 (this results in higher net international in-migration to Greater Manchester over the period 2012-2023 than in the ONS projections)
- Household representative rates from the DCLG 2012-based sub-national household projections

A.12 This scenario has been identified in the separate report as the objectively assessed need for housing, and gives a housing requirement for Greater Manchester of 217,350 net additional dwellings over the period 2014-2035, once net dwelling completions over the period 2012-2014 have been taken into account.

A.13 The 2014 GMFM produced by Oxford Economics, discussed above in relation to Option 1, is a 'policy-neutral' baseline forecast based on the judgement of the forecasters as to the likely future trajectory of different variables and the relationship between them. It would be expected that, without specific policy interventions, that the 2014 GMFM would lie broadly in the middle of the range of possible futures. However, the Greater Manchester Combined Authority, the individual districts and the Government have all clearly expressed their positive ambitions for Greater Manchester and the North of England more generally. If measures are put in place to help deliver these ambitions, then this might be expected to promote higher levels of economic growth than in the baseline forecast. Furthermore, if higher levels of population and household growth were expected, as identified in the objectively assessed need for housing, then a further increase in economic growth would be anticipated.

34 This household growth scenario is referred to as scenario 8A in the report on the objectively assessed need for housing.

A.14 Consequently, Oxford Economics has produced an 'accelerated growth scenario', which is based around the following two key objectives set out in the Government's long term economic plan for the North West[35]:

1. To increase the long term growth rate of the North West to at least the forecast growth rate of the whole of the UK

2. To raise the employment rate in the North West to the UK average, which would ensure that over 100,000 additional people are in employment in the North West during this Parliament (i.e. by 2020)

A.15 A version of this accelerated growth scenario has been modelled using the ONS 2012-based sub-national population projections as an input. Since the objectively assessed need for housing only involves a modest increase in population compared to these sub-national population projections, and to avoid an unnecessary number of scenarios being produced, a separate version of the accelerated growth scenario based on the objectively assessed housing need has not been modelled and instead the impacts of the small amount of additional population on economic variables have been estimated.

A.16 As with the 2014 GMFM baseline, the accelerated growth scenario outputs include an estimate of the net change in employment floorspace. However, as noted above, there is no simple way of translating net employment floorspace change to a gross requirement for new floorspace. It has been assumed that half of the increase in employment floorspace compared to the 2014 GMFM floorspace estimates will involve additional new floorspace, and half will be due to less existing floorspace being lost. This leads to the employment floorspace requirements that have been identified in Option 2.

Option 3

A.17 As discussed earlier, a wide range of different assumptions have been modelled in order to produce a variety of population forecasts. The following combination of assumptions resulted in the highest population growth scenario, using a base date of 2012[36]:

- Birth and death rates from the ONS 2012-based sub-national population projections

35 HM Government (8 January 2015) Long term economic plan for the north-west set out by Prime Minister and Chancellor
www.gov.uk/government/news/long-term-economic-plan-for-the-north-west-set-out-by-prime-minister-and-chancellor-
36 This population growth scenario is referred to as scenario 6 in the report on the objectively assessed need for housing.

- Ten-year average internal (within the UK) migration inflows and outflows (absolute numbers rather than rates), based on the period 2002-2012 and calculated from ONS mid-year estimates, applied to the period 2012-2035
- Ten-year average international migration inflows and outflows, based on the period 2002-2012 and calculated from ONS mid-year estimates, applied to the period 2012-2035
- Average level of unattributable population change (UPC) from the ONS mid-year estimates, based on the period 2002-2011, added to the average international inflows where the UPC is positive and added to the average international outflows where the UPC is negative

A.18 The report on objectively assessed housing need concludes that most of these assumptions would be expected to result in a population forecast that is less likely to be correct than that used in Option 2. Levels of internal migration from Greater Manchester to the rest of the UK are likely to increase as the population of Greater Manchester increases, but the use of internal migration flows in this scenario ignores this fact, whereas the use of internal migration rates in Option 2 takes it into account. As noted above in relation to Option 2, the latest international migration figures for the UK suggest that the assumptions used in the ONS 2012-based population projections are likely to underestimate international migration in the short term. However, in the medium to long term, it might be expected that international migration would reduce to the levels projected by the ONS, not least because of the high political profile of this issue, but also as the relative economic performance of other countries improves. Consequently, applying higher international migration flows throughout the forecast period to 2035 would be expected to overestimate population growth.

A.19 The ONS has attempted to identify the components of change that explain population change between the 2001 and 2011 censuses, in terms of births, deaths, internal migration and international migration. However, based on its best estimate of these components of change, it found that it could not explain all of the population change seen during that period, resulting in what it terms 'unattributable population change' (UPC). This UPC is most likely to be the result of one or a combination of inaccurate census figures, inaccurate estimates of internal migration, and/or unrecorded international migration, and is quite significant in Greater Manchester. The report on the objectively assessed need for housing concludes that no allowance should be made for the UPC when forecasting future population growth in Greater Manchester, primarily because part of it is likely to be the result of 2001 Census inaccuracies and any problems with the under-recording of international migration are likely to be concentrated in the period before 2006. Nevertheless, the scenario described here assumes that all of the UPC is the result of unrecorded international migration that impacts on the past trends used to model future population growth, and makes an allowance accordingly, and so is likely to prove an overestimate.

A.20 The objectively assessed need for housing in Option 2 uses the household representative rates from the DCLG 2012-based sub-national household projections to translate its forecast population growth into household growth. The previous long-term estimates of future household representative rates were in the DCLG 2008-based sub-national household projections, which are generally higher than the 2012-based rates. The report on objectively assessed housing need concludes that it is unlikely that there will be a return to the 2008-based rates, and that the 2012-based rates are likely to be the best estimate of future household formation. However, the highest population growth scenario has been modelled using both sets of rates in order to produce two separate household forecasts, enabling differences in household formation assumptions to be appreciated. Once household growth over the period 2012-2035 has been translated into dwelling requirements for the period 2014-2035, taking into account the net additional dwellings provided in 2012-2014, this leads to the following dwelling requirements for the period 2014-2035 using this higher population growth forecast[37]:

- Using the 2012-based household representative rates:

  303,507 net additional dwellings, or an average of 14,453 per annum

- Using the 2008-based household representative rates:

  351,100 net additional dwellings, or an average of 16,719 per annum

A.21 Another version of the accelerated growth scenario described in Option 2 has been produced using this higher population growth as an input (AGS-Higher). This leads to additional economic growth compared to Option 2.

A.22 In July 2015, a campaign called 'Housing the Powerhouse' was launched, led by the Home Builders Federation and backed by a range of housebuilders, developers and investors. This proposed that Greater Manchester should be planning for an additional 16,000 dwellings per annum. Some of those involved in the campaign made representations during the last consultation on the Greater Manchester Spatial Framework (GMSF), and suggested that options involving higher levels of growth should be considered through the GMSF process.

37 These household growth scenarios are referred to as scenarios 6A and 6B, respectively, in the report on the objectively assessed need for housing.

A.23 As a result, Option 3 is framed around the Housing the Powerhouse proposals, in order to ensure that options suggested by interested parties are considered. Although a wide range of demographic scenarios have been modelled, the only combination of assumptions that would lead to a dwelling requirement anywhere near 16,000 dwellings per annum is the higher population growth scenario discussed above together with the use of the DCLG 2008-based household representative rates. The Housing the Powerhouse proposal of 16,000 dwellings per annum could therefore be considered to represent this level of population growth, but with household representative rates somewhere between the 2012-based and 2008-based rates, though closer to the latter. The 'AGS-Higher' economic forecast, which is based on that level of population growth, then provides an indication of the scale of economic growth that might be seen if the Housing the Powerhouse levels of housing growth were to be realised.

A.24 As with Option 2, it has been assumed that half of the increase in employment floorspace under this scenario compared to the 2014 GMFM forecast of net change will involve additional new floorspace, and half will be due to less existing floorspace being lost. This leads to the employment floorspace requirements that have been identified in Option 3.

GM SPATIAL FRAMEWORK