Greater Manchester Spatial Framework
The emerging draft plan

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Greater Manchester Combined Authority

Greater Manchester Combined Authority (GMCA) established 2011

10 local councils:

Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford, Wigan

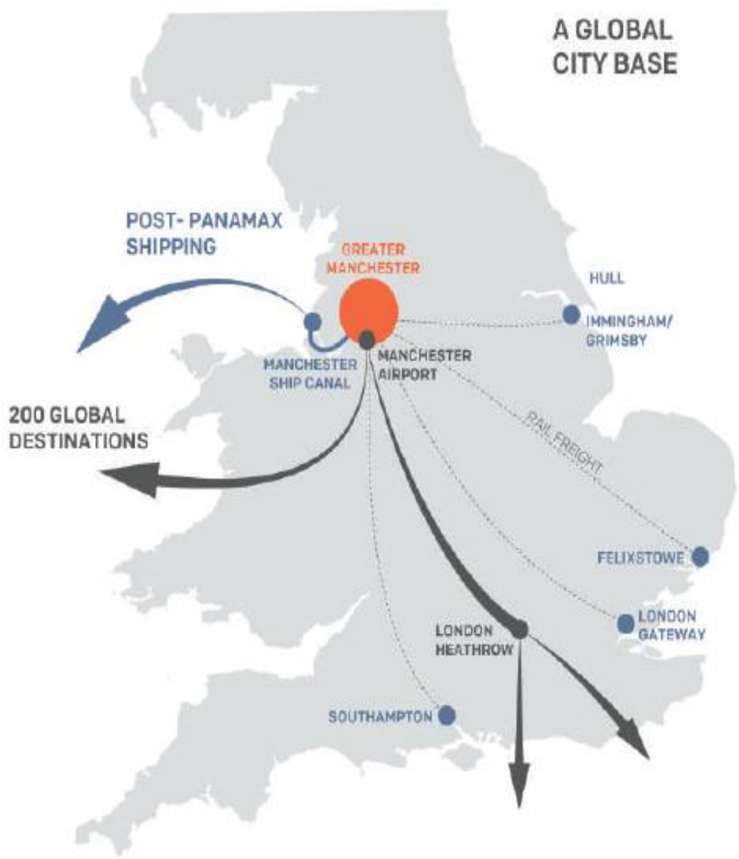
2.8 million people

Population is expected to grow by another quarter of a million by 2035

First metro mayor Andy Burnham elected May 2017 (turnout 29%. Share of vote 63%)

Greater Manchester Combined Authority (Functions and Amendment) Order 2016 confers on GMCA a duty, exercised by the Mayor, to prepare a spatial development strategy.

Greater Manchester: global city ambitions



Greater Manchester has a pivotal role to play in the Northern Powerhouse

Main driver of economy of the north – 40% of output (GVA) across North West; 19% of the north.

But productivity currently low

Growth in service sector in last two decades

Jobs forecast: 110,000 - 180,000

Core Growth Area: City Centre and Salford Quays

Key transport: HS2; Manchester Airport; Manchester Ship Canal

Pre-election draft GMSF: published 2016

High level strategic document

227,200 net additional homes, 11,360 dwellings per annum (dpa) between 2016 and 2036

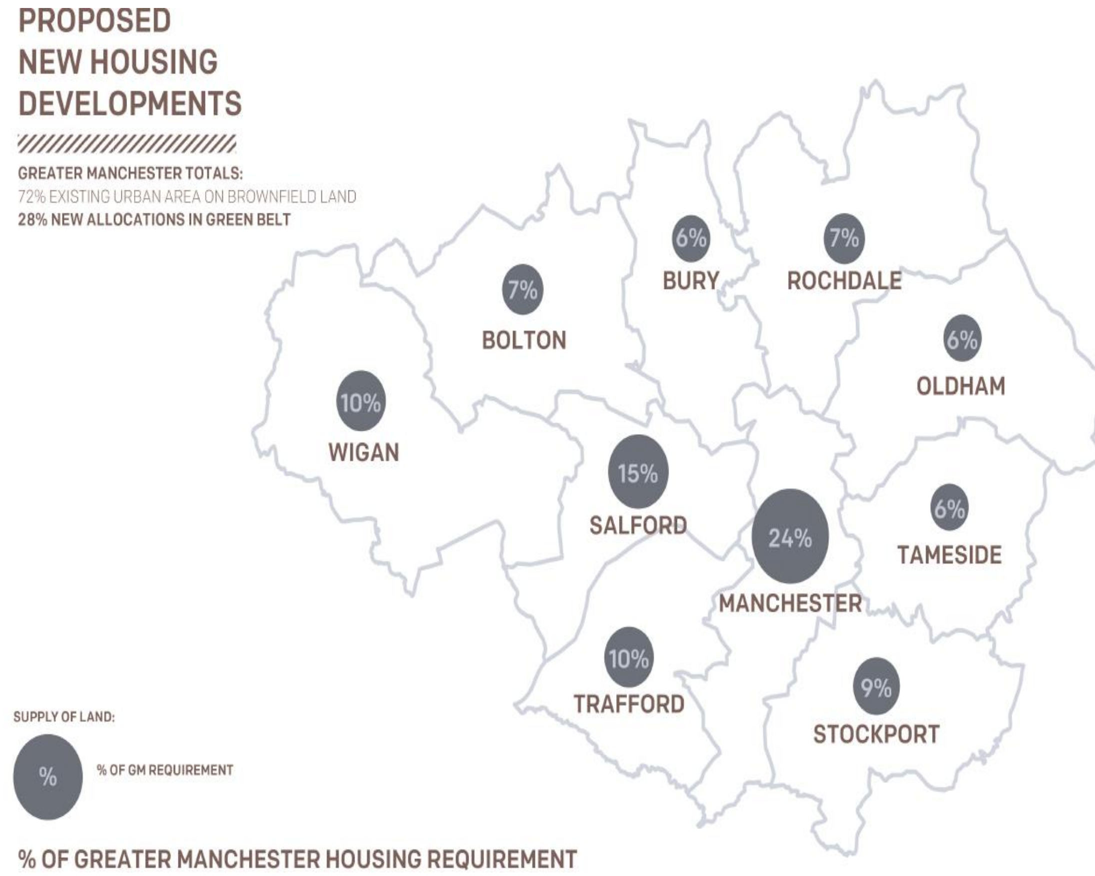
60% houses / 40% flats

Makes strategic allocations

No affordable housing target

Requires unanimous support

Aim to adopt the GMSF in 2018



Green belt release:

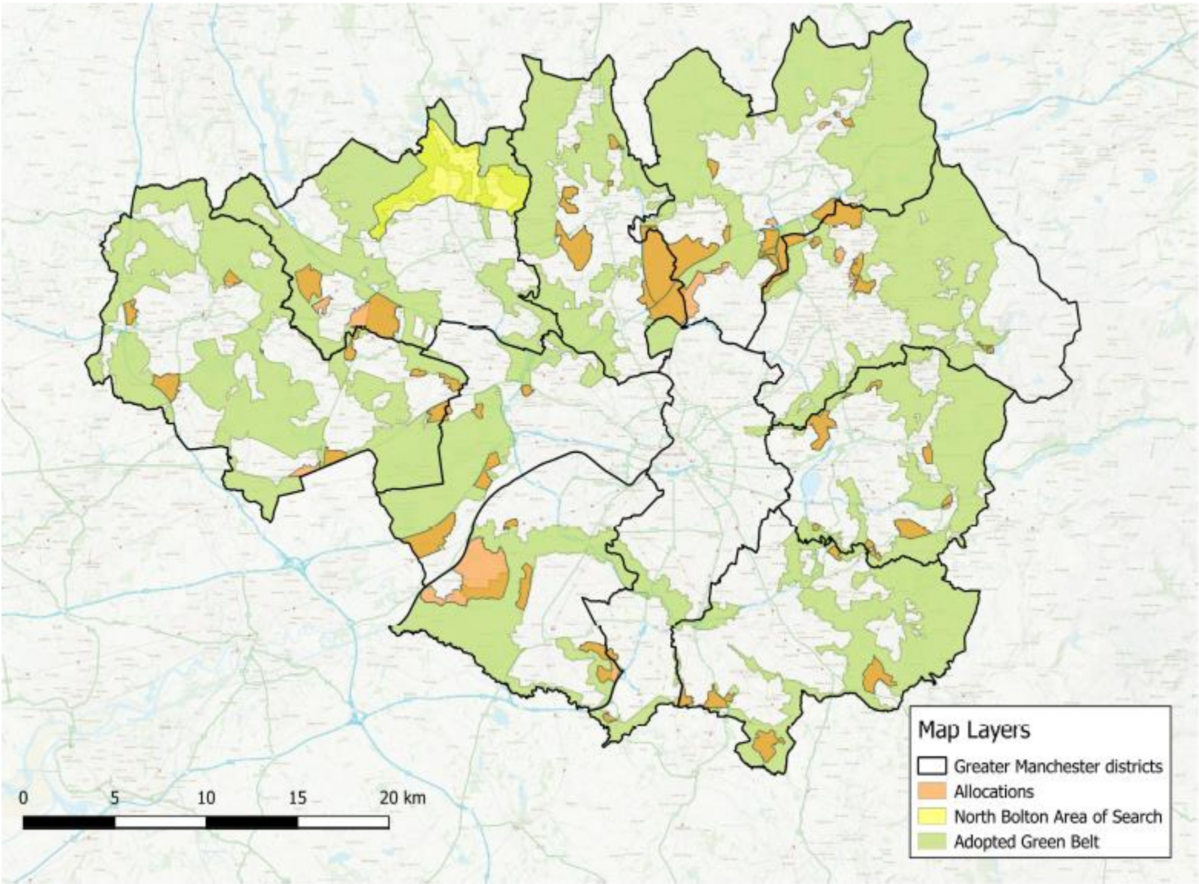
4,900 hectares of Greater Manchester's green belt to be de-designated for an estimated 64,500 homes

Reduction of green belt from 47% to 43% of GM total land area

Most representations questions green belt release

Burnham campaigns to 'radically re-write' the GMSF

Figure 16.1 Proposed Allocations and Green Belt



Net opposition to green belt release

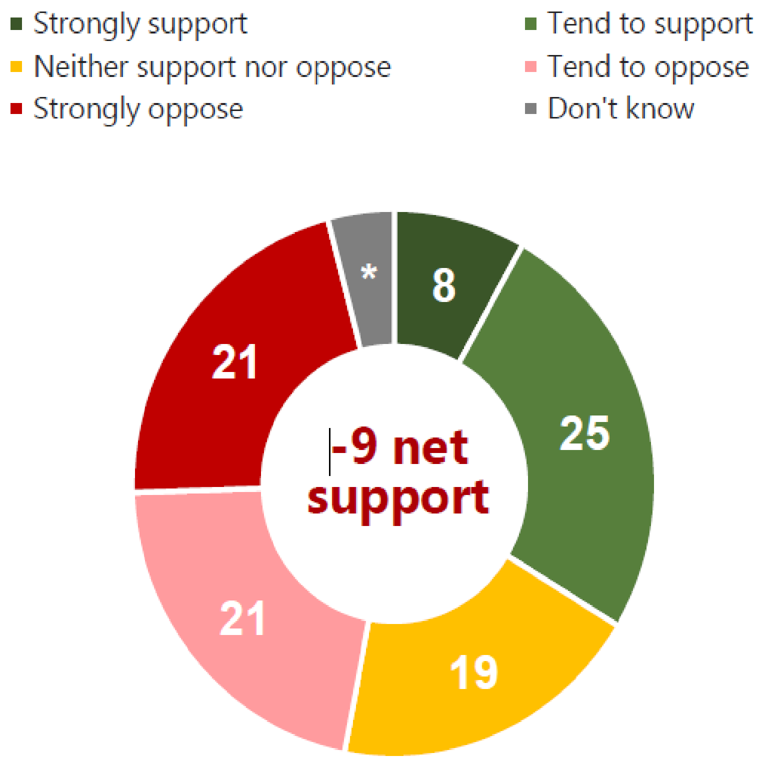
IpsosMori research in 2017

Asked people (sample of 2,000):

“Do you support or oppose the building of new homes on parts of Greater Manchester’s green belt to meet housing demand?”

Support for the green belt continues but is waning among younger cohorts:

45% of 18-24 year olds support
39% of 25-34 year olds support
32% of 35-44 year olds support



Revised Draft GMSF

Plan period: 2018-2037

Housing requirement falls to 201,000 or 10,050 dpa (minimum under the standard Method)

MHCLG expected Burnham to adhere to 227,000

MHCLG cancels its Housing Deal worth £68m for next five years

Burnham on record wanting to go as low as 154,000 or 7,700dpa (using 2014 projections)

Housing Waiting List = 85,000

Net affordable housing need = 4,678 homes a year

2019 draft GMSF: proposed distribution of housing by district

Numbers of dwellings

District	2019 draft: Total requirement	2019 draft: Annual average requirement	Total requirement in 2016 draft	*% change between drafts*
Bolton	13,800	726	16,800	*-18%*
Bury	9,470	498	12,500	*-24%*
Manchester	54,530	2,870	55,300	*-1%*
Oldham	14,290	752	13,700	*+4%*
Rochdale	12,160	640	15,500	*-22%*
Salford	32,680	1,720	34,900	*-6%*
Stockport	14,520	764	19,300	*-25%*
Tameside	8,850	466	13,600	*-35%*
Trafford	19,280	1,015	23,100	*-17%*
Wigan	21,400	1,126	22,500	*-5%*
Total	**200,980**	**10,578**	**227,200**	***-12%***

“The truth is I would have liked to go further (in reducing land allocations)…but (this was) effectively made impossible by the Government’s insistence on us using the old population and housing figures, which are significantly higher than the most recent ONS projections”.

Andy Burnham speaking at “The Future of Greater Manchester” event, 7 January 2019.

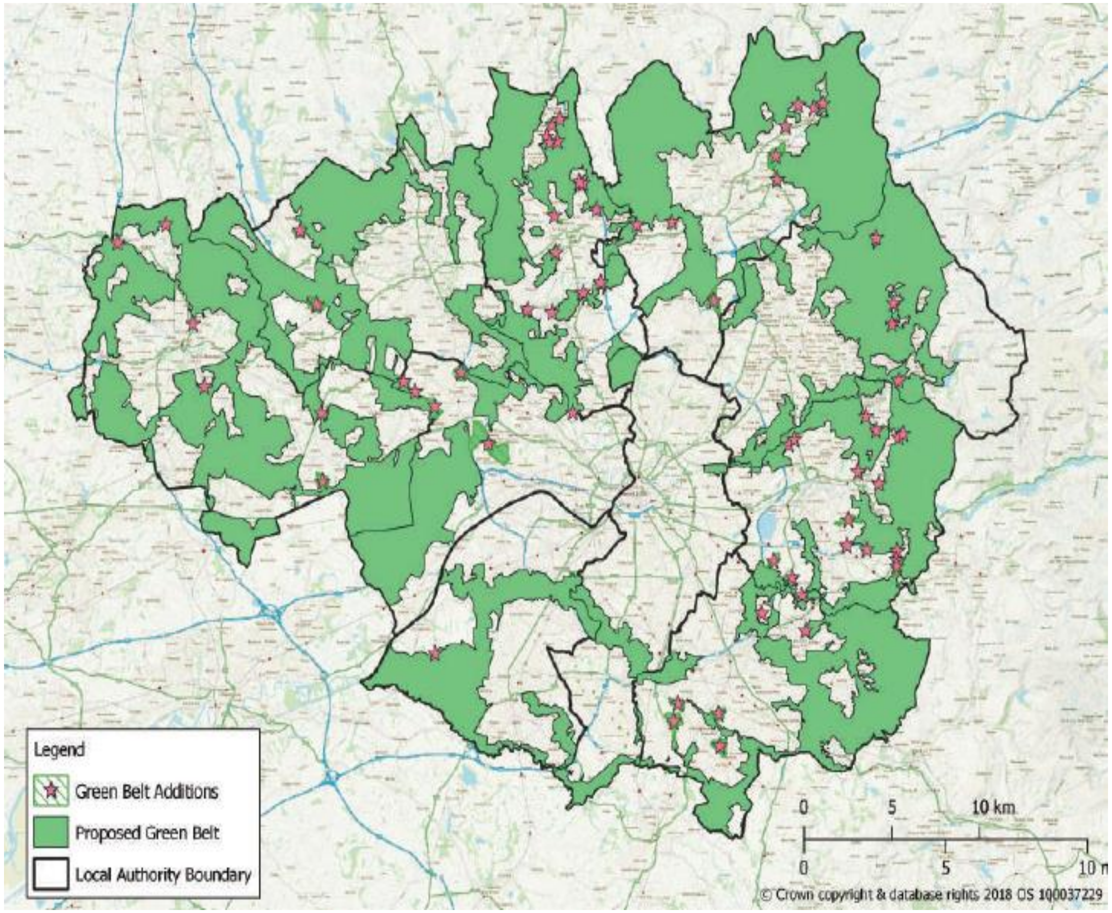
Green belt release reduced by half

2019 draft GMSF proposes releasing 2,430 hectares of land from the green belt compared to the 4,900 hectares in the 2016 draft

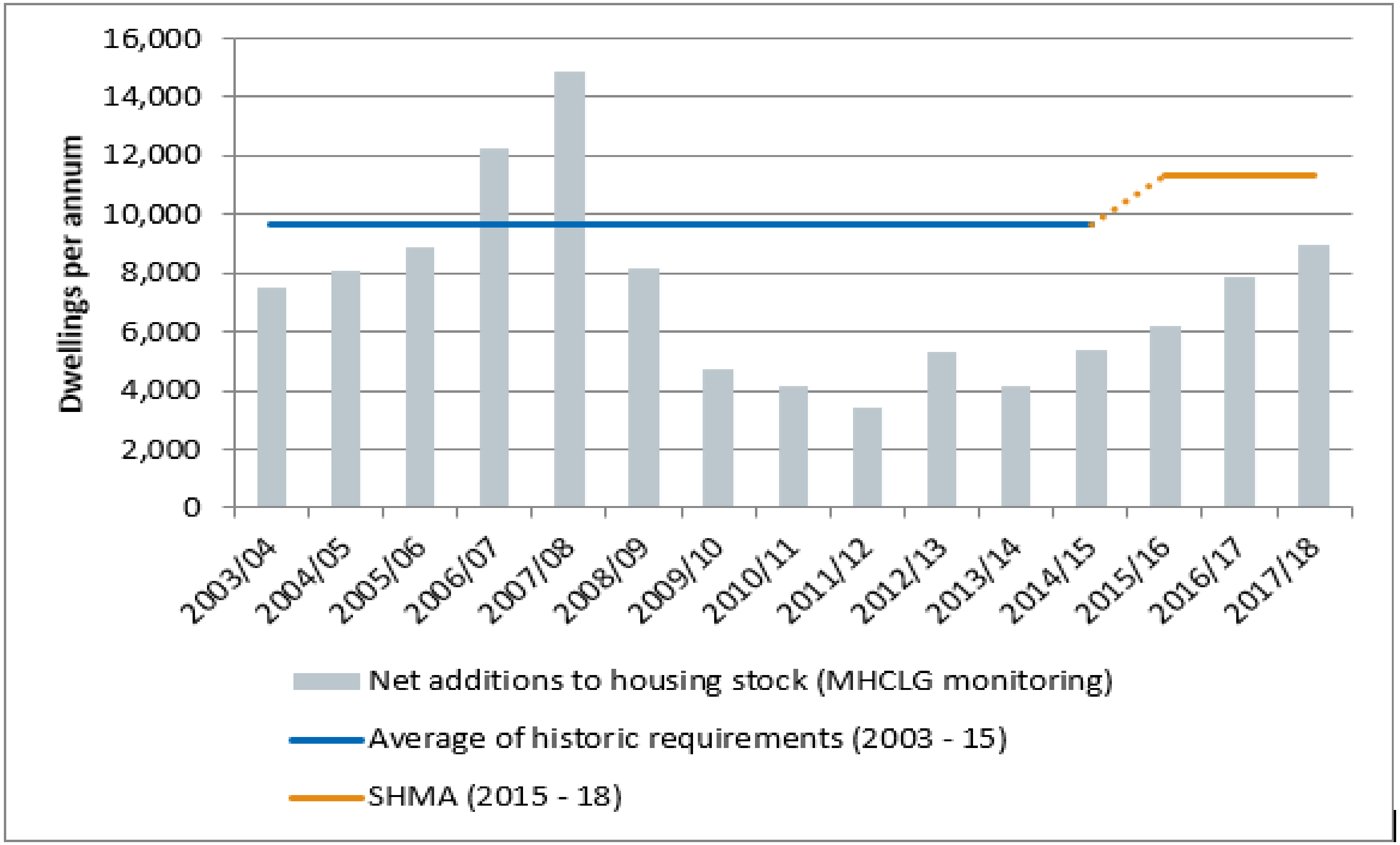
Proposed release would reduce the extent of the Greater Manchester green belt from 47% to 45%

Release could support estimated 24,000 homes

New additions proposed but there remains a question over GM's longer-term development needs



Past delivery – poor. Caused by out of date plans. Seven out of ten need to apply a buffer under the HDT



Source: MHCLG; Turley analysis

Affordable housing need

Draft 2019 GMSF includes an affordable housing target

4,678 affordable homes needed each year (2019 SHMA)

Equivalent to 44% of overall need

Or 60% if the lower target of 154,000 had been adopted

Plan Target - 50,000 affordable homes equivalent to 25%

30,000 households in priority need

Table 7.13: Estimate of net additional affordable housing requirements

Area	Total net need = Step 1.4 - Step 3.5	Annual flow (20% of total net need)	Estimated Net annual affordable housing requirement = (2.4 + Annual flow) - 3.8
Bolton	3,065	613	496
Bury	487	97	263
Manchester	4,325	865	1,156
Oldham	3,844	769	422
Rochdale	993	199	307
Salford	5,992	1,198	613
Stockport	2,676	535	595
Tameside	3,898	780	503
Trafford	1,106	221	446
Wigan	1,434	287	31
Greater Manchester	27,820	5,564	4,678

Total affordable homes completed since 2011/12 = 11,435

Table 5.7: Total Additional Affordable dwellings completed, 2011-2018

Area	Total Additional Affordable dwellings- completions							
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	Total
Bolton	170	100	250	160	50	110	60	900
Bury	110	130	70	120	70	70	100	670
Manchester	740	330	370	370	120	230	305	2,465
Oldham	220	140	220	150	20	80	21	851
Rochdale	130	110	120	170	30	70	54	684
Salford	260	180	170	490	210	460	258	2,028
Stockport	150	90	140	220	90	110	336	1,136
Tameside	160	160	140	220	80	100	80	940
Trafford	80	90	180	90	50	100	165	755
Wigan	100	80	70	130	110	220	336	1,046
Greater Manchester	2,110	1,390	1,730	2,120	820	1,550	1,715	11,435

Source: MHCLG Live table 1008c, Total additional affordable dwellings by Local Authority District

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Affordable homes provided via S106 in last five years = 768

Table 5.8: Section 106 completions by type, 2013/14- 2017/18

Area	2013/14		2014/15		2015/16				2016/17				2017/18				Total
	Social rent	Affordable Home ownership	Social rent	Affordable Home ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	
Bolton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10	-	10
Bury	-	-	-	24	-	28	-	-	-	30	-	-	-	27	-	-	109
Manchester	-	-	-	-	-	-	-	11	-	-	-	-	-	-	-	-	11
Oldham	-	-	-	-	-	-	-	-	-	-	-	29	-	-	-	-	29
Rochdale	-	3	-	-	-	-	-	-	-	-	5	-	-	-	-	-	8
Salford	16	14	2	15	10	4	12	4	-	-	13	2	2	-	4	10	108
Stockport	-	-	2	9	6	35	-	-	9	-	8	74	16	-	8	65	232
Tameside	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
Trafford	-	9	-	-	-	-	-	4	-	-	-	15	-	-	-	-	28
Wigan	-	11	-	16	-	50	-	-	-	34	7	9	-	53	15	38	233
Greater Manchester	16	37	4	64	16	117	12	19	9	64	33	129	18	80	37	113	768

Source: MHCLG Live Table 1011c: Affordable Housing Supply Statistics

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Type of homes

Out of the identified land capacity for 181,023 homes, it is expected that some 60% (107,859 homes) will be provided as flats, and 40% (73,164 homes) as houses. This is set out below:

	Houses	Apartments	Total
SHLAA Total (2018-2037	73,164	107,859	181,023
Proportionate split	40%	60%	100%

But SHMA 2019 indicates the converse: that *at least 65%* of the new homes should be houses based on 2001-2011 Census trends continuing.

How far can GM politicians re-engineer the housing market?

Importance of a density matrix (Policy GM-H 4).

Conclusion

GMSF valuable as a spatial plan covering a wider political geography

Coherent city regional planning - aligning with major national initiatives

Has the ability to bring forward major strategic sites faster than relying on local plans

Strategic-scale green belt review

BUT

GMCA – fragile political entity. Mayor needs to maintain a consensus. Recognition that the boroughs will need to be used to the concept of a ‘metro mayor’ and GMSF

Potential for further delay caused by local politics is a real threat

Made harder by retirement of ‘old guard’ – Sir Richard Leese is the only leader left among those originally championing the GMSF

Is there a need to strengthen the devolution framework to give metro mayors comparable powers to the Mayor of London?

The voice of the home building industry

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