

# Manchester MediPark Regeneration Framework

December 2012





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## EXECUTIVE SUMMARY

The Manchester MediPark Regeneration Framework sets out the basis upon which a new, exciting and innovative business led project can be introduced to South Manchester.

Manchester MediPark is a unique opportunity to develop a world class Life Sciences and Healthcare led business park. The Medipark forms part of a wider cluster of businesses, academic institutions and hospitals situated within the South Manchester 'Corridor'.

The MediPark forms an integral part of the Greater Manchester Enterprise Zone and sits in close proximity to Manchester International Airport. It forms part of the Manchester Airport City development area which in overall terms will deliver over 300,000 sqm of new employment generating floor space over the next 25 years.

The MediPark concept is based on a wide ranging body of research that has clearly identified an opportunity to build on the region's research and development capabilities and benefit from the synergies of being located adjacent to a major teaching hospital at the heart of the Manchester conurbation. The translation of Research and Development (R+D) from ideas to manufacturing and production in and around Manchester MediPark is the key to securing the long term success of the project.

MediPark will be attractive to range of potential occupiers, principally those doing business within the life sciences and healthcare marketplace. The site extends to around 10 hectares in the first phase and potentially to a wider area taking in Roundthorn Industrial Estate to the north of the main hospital campus.

There is potential to accommodate up to 500,000 sqft of building and deliver over 2770 direct jobs in the MediPark direct development area. The potential for new floorspace and jobs associated with the MediPark scheme is even greater than that. The consequential impact of such investment will be significant at the local community level where jobs and investment are much needed.

The project sits squarely within the policy framework related both to economic policy, town planning and the wider health and wellbeing agenda. The project is supported within the Manchester City Council adopted core strategy and the Wythenshawe Strategic Regeneration Framework. From an economic perspective, the site is captured within the Manchester Airport Enterprise Zone Framework Plan endorsed by Manchester City Council in October 2012.

The MediPark is served by an excellent infrastructure network enjoying close links to the motorway network and the Airport. These will be improved over time, particularly when Metrolink arrives in 2015 but also through other strategic links proposed as part of this framework plan that are underpinned in policy. This includes a link road running south from the site to the M56 and the Airport.

A masterplan has been drawn up for the site. This sets out in clear terms infrastructure and movement networks required to support the MediPark, as well as identifying in broad terms the way the site can be developed over time.

A set of sustainability principles sit alongside the masterplan. These are organised around environmental, physical and economic themes.

The MediPark will deliver over 2770 direct jobs and GVA of £190m It will undoubtedly have a catalytic impact on the hospital and the surrounding economic development area. This regeneration framework sets out the clear rationale for taking the MediPark forward.

## THE VISION

Manchester MediPark is a unique opportunity to develop a world class biosciences and healthcare initiative with a remit that focusses on production and manufacturing within a research led environment. The Medipark forms part of a wider cluster of businesses, academic institutions and hospitals situated within the South Manchester 'Corridor'. Taken in aggregate, the Corridor represents an internationally important economic growth cluster at the heart of the Greater Manchester conurbation.

Situated within the Greater Manchester Enterprise Zone in close proximity to Manchester International Airport, the MediPark will support a range of health related businesses and supporting uses focused around University Hospital South Manchester Foundation Trust (UHSM). Occupiers at the MediPark will benefit from the connectivity of the airport and the financial incentives provided by the Enterprise Zone (EZ). The MediPark will provide high value employment positions and economic growth for Greater Manchester over the next 15 years.

The MediPark will provide both a creative and supportive environment in which businesses can grow and exploit the comparative advantages of the location. It will achieve this by targeting a range of occupiers whom will operate broadly in the healthcare/life sciences sector.

Occupiers will benefit from the advantages presented by being located adjacent to a hospital with a commercial and proactive approach to knowledge transfer, clinical trials, training and product development. UHSM, as a world class research hospital and centre of clinical excellence, is supported by the University of Manchester and the Manchester Academic Health Science Centre. These relationships will be fundamental to the development and commercialisation of drugs, medical devices and treatments for the life science companies located within the MediPark.

The development of relationships between companies and UHSM should facilitate innovation in the delivery of services and deliver benefits in the quality of healthcare provided to hospital patients.

# 1 INTRODUCTION

## The MediPark Opportunity

Manchester MediPark will build upon the well established concentration of health research, learning and clinical expertise at UHSM to create a catalyst for growth within the Manchester City Region. The project can make a significant contribution to the UK and regional science and innovation agenda. Manchester MediPark will be a location where life science and healthcare related businesses can grow in a reduced risk environment.

The MediPark will provide accommodation for both established businesses seeking to use the location as a vehicle for growth and also for those businesses wishing to exploit a supportive infrastructure in place on the site to establish a new business

Today, Manchester benefits from an outstanding platform for supporting business and generating future economic growth over the next ten years including:

- The second largest concentration of people and businesses in the country with a highly skilled and lower cost workforce than London and the south east;
- An exceptional higher education offer;
- The proven ability to attract inward investment through a competitive business proposition, with Manchester being placed first out of 15 UK cities for locating either a new headquarters or back-office function;
- Strong domestic business base, which has historically delivered higher than national- average GVA growth and is the city's main source of investment and productivity, stimulating and driving supply chains and employment growth.
- A strong infrastructure offer, with further enhancements planned, that provides connectivity across the conurbation and the wider region, along with direct access to the rest of the United Kingdom and world via Manchester Airport.

It is within this context that the Manchester MediPark will play a key role in the next phase of transforming the city as a place to invest, work and live.

## 2 LOCATION

In geographic terms, UHSM and the proposed adjoining MediPark lie within the Greater Manchester City Region within the Local Authority of Manchester, to the south of the conurbation.

### South Manchester Context

The following image illustrates the MediPark's position in South Manchester, lying adjacent to the town of Wythenshawe and the connectivity hub of Manchester Airport.

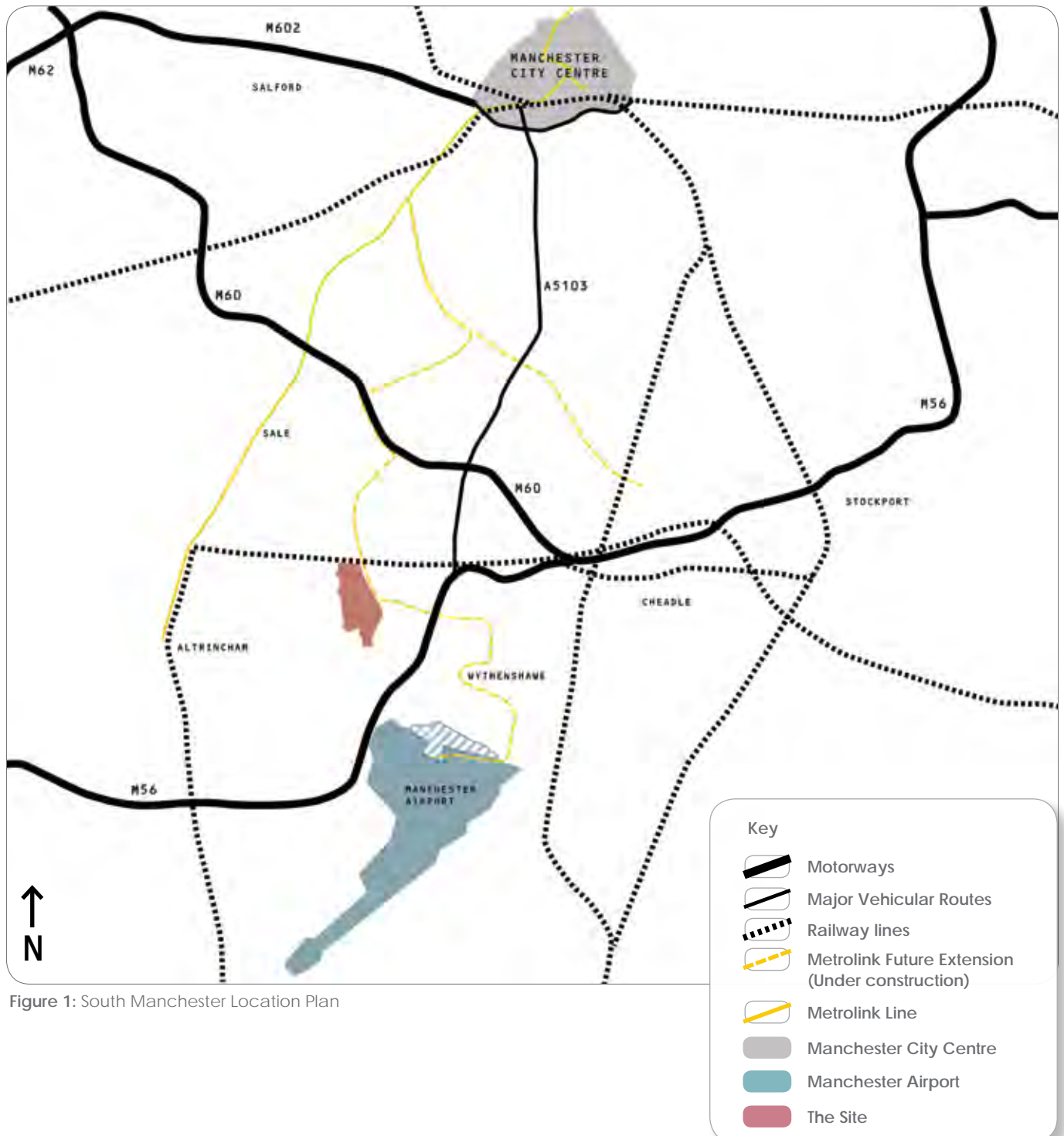


Figure 1: South Manchester Location Plan



## Wythenshawe Context

The following plan illustrates the location of Manchester MediPark within the context of Wythenshawe and the surrounding EZ sites.

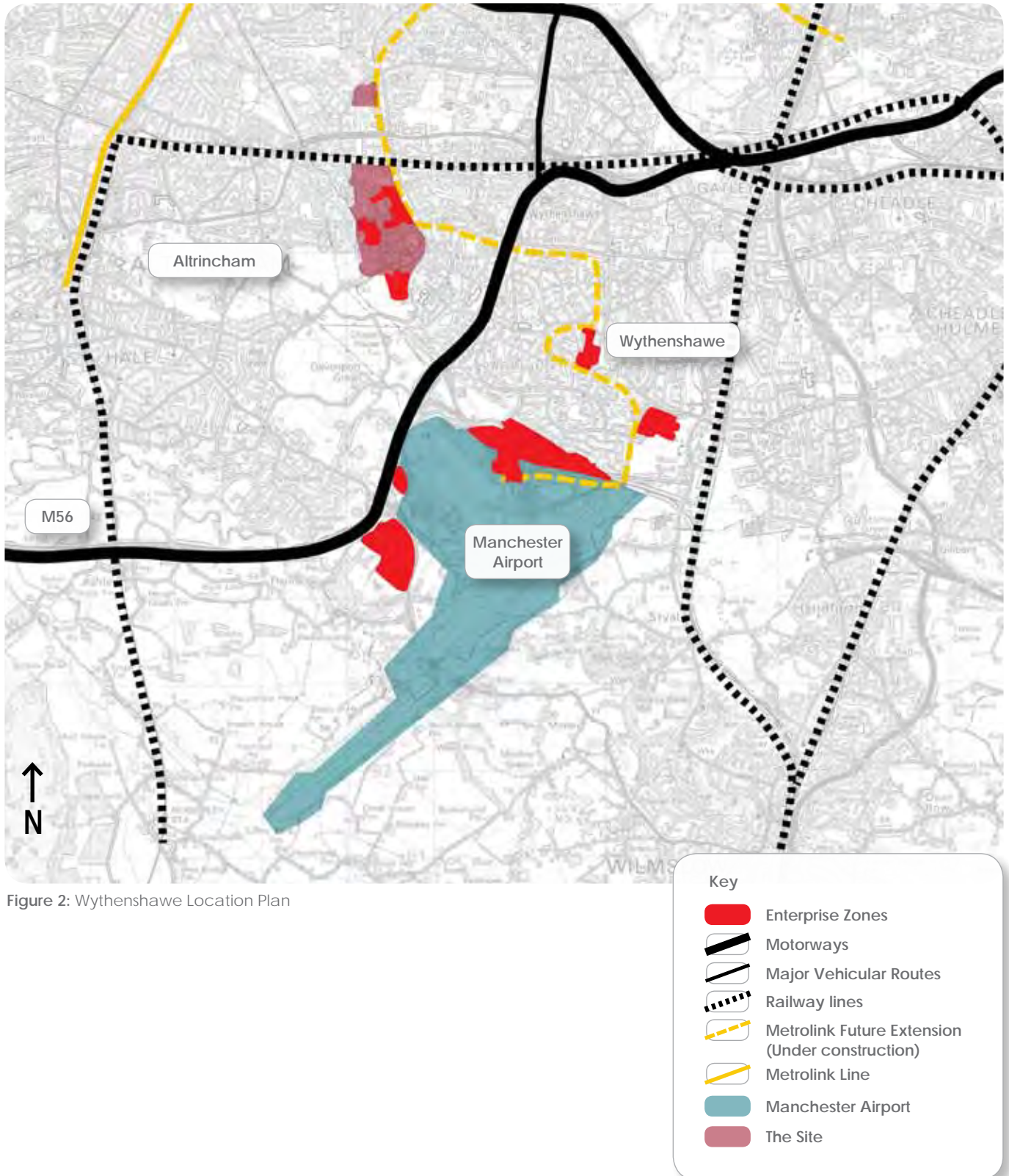


Figure 2: Wythenshawe Location Plan

### 3 THE MEDIPARK OFFER

UHSM and the surrounding parcels of land present a strong opportunity to deliver economic growth and job creation for Manchester and the City Region. To understand the potential demand and the profile of occupiers, it is necessary to understand UHSM's characteristics, strengths and physical assets so that these can be communicated and marketed appropriately.

## Centre of Excellence

UHSM is accredited as a centre of excellence for multidisciplinary research and development and is respected as one of the country's' best teaching and research acute hospitals. The Health Secretary recognised UHSM as:

“a centre of excellence for research, education, clinical services, quality and sound financial performance<sup>1</sup>.”

The Trust's strategic objectives as set out in their 3 year plan are to:

- Become a quality and efficiency leader, improving the quality of front line patient care through an open culture of engagement with their colleagues and partners;
- Become a 'networked partner' through the development of partnerships that will enable the Trust to compete in a complex marketplace; and
- Be a leader in the education, training, research and development particularly in areas of specialist strength.

In terms of investment the Trust is committed to:

- An £11m capital investment programme that include the completion of the maternity centre redevelopment and investment in IT equipment and infrastructure;
- A quality and efficiency programme that will reduce cost of waste and duplication by £17.5m by 2015;
- Delivery of collaborations with NHS partners including a pathology reconfiguration and set up of a Trauma Centre network for GM;
- The onward development of a UHSM Innovation Strategy, further increase in clinical trials capability and the set up of a UHSM academy to deliver a people and organisational development plan.

The opportunity exists to build upon the Trust's reputation and well-established research infrastructure to develop an internationally significant MediPark which will act as a catalyst for economic growth in the local area of Wythenshawe but also much further afield across Greater Manchester and the wider region. The potential to build an internationally competitive and compelling proposition exists uniquely in this location. The success of UHSM is, in part, down to the complimentary strength of its Research, Clinical and Education elements.

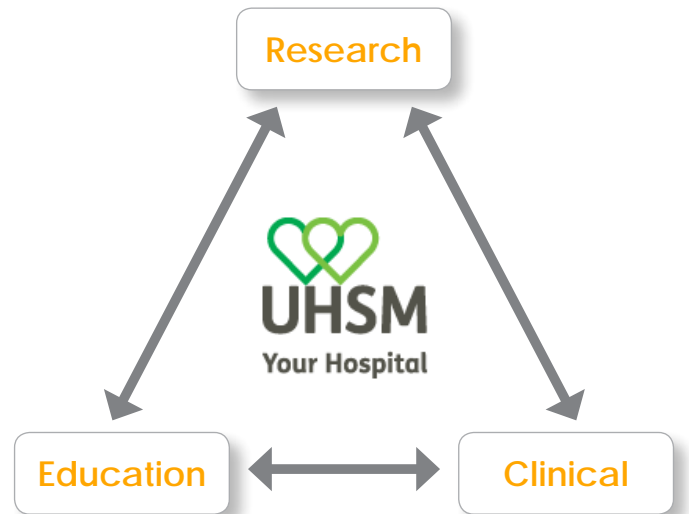


Figure 3: UHSM Structure

UHSM has a clear short and medium term strategy geared to:

- Maintaining and developing healthcare in the immediate locality;
- Developing specialist services for specialist care – particularly cardiology, cardiothoracic surgery, respiratory, cancer, burns and plastics, gynaecology and trauma; and
- Pursuing a strategy for commercial opportunities – as evidenced by the MediPark plan.

<sup>1</sup> www.uhsm.nhs.uk/research [Accessed September 2012]

## Key Facts

The following table details some key facts and figures which illustrate the significance of the Trust and the role that it plays in contributing to the economy.

UHSM – Key Facts and Figures	
Designation	<ul style="list-style-type: none"> <li>Established as a first wave Foundation Trust on 1st November 2006 under the National Health Service Act 2006.</li> </ul>
Role	<ul style="list-style-type: none"> <li>Major Acute Teaching Hospital for University of Manchester.</li> <li>Recognised Centre of Clinical Excellence.</li> <li>Foundation Trust comprises Wythenshawe Hospital &amp; clinical services delivered at Withington Community Hospital.</li> <li>Member of the Manchester Academic Health Science Centre (MAHSC) formed in July 2008 to underpin the development of Greater Manchester as a world leader in health research.</li> </ul>
History – Wythenshawe Hospital	<ul style="list-style-type: none"> <li>Originally Baguley Sanatorium over 100 years ago.</li> <li>The Maternity Hospital and F-side wards opened in the mid 1960s.</li> <li>In 1993 a new Heart Transplant Centre opened.</li> <li>In 1999 Wythenshawe’s first wave PFI Acute Unit opened.</li> <li>In 2001 the Education &amp; Research Centre was constructed.</li> <li>In 2008 Europe’s First Breast Cancer and Prevention Centre and the North West Heart Centre were opened by HRH The Princess Royal.</li> <li>In 2012, completion of new Maternity Unit as a result of reconfiguration of maternity and children’s services across Greater Manchester, ‘Making it Better’.</li> </ul>
Catchment	<ul style="list-style-type: none"> <li>Serves a population of approximately 570,000</li> </ul>
Staff	<ul style="list-style-type: none"> <li>Approximately 5,100 NHS staff (including more than 450 staff delivering community services in South Manchester. A further 800 staff are employed by the PFI Partner, South Manchester Healthcare Limited) There are also approximately 450 regular volunteers.</li> </ul>
Patients treated	<ul style="list-style-type: none"> <li>Circa 500,000 per annum</li> </ul>
Beds	<ul style="list-style-type: none"> <li>2012 – 920 inpatient beds</li> </ul>
External Research	<ul style="list-style-type: none"> <li>Over 300 Research programmes each year.</li> </ul>
Undergraduate Medical Education	<ul style="list-style-type: none"> <li>Approximately 450 medical students</li> </ul>

## Research and Development

There are a number of notable statistics which demonstrate the Trust's orientation towards collaborative research and innovation in the health sector:

- In 2011-12 UHSM had 331 open clinical research projects supported by funding from Research Councils, charities, National Institute of Health Research (NIHR), international funders and industry, including commercial contracts to develop new medicines, devices and procedures. These studies covered 11 clinical specialties and were supported by 173 dedicated clinical research staff.
- For 2011-12 there were 18,558 patients recruited to clinical trials which compares against 19,319 patients for the year 2010/11. The bulk of this recruitment originates from the Procas study which involves 60,000 women, the largest research study in the UK for the detection and prevention of breast cancer. However when Procas figures are removed, there is a year on year increase of 12.3% in recruitment to studies, a positive trend with new areas of activity beginning to emerge. During 2011-12 the level of participation in clinical research has resulted in UHSM being the second highest recruiter to NIHR portfolio studies nationally.
- Greater Manchester Comprehensive Local Research Network (CLRN) is hosted by UHSM, and in 2011-12 UHSM was the highest recruiting organisation in Greater Manchester. UHSM was also amongst the best compared to equivalent organisations for turnaround of approvals of clinical trials within Greater Manchester.
- In the last year, 297 publications have resulted from the Trust's involvement in quality research helping to improve patient outcomes and experience across the NHS. This level of participation in clinical research demonstrates UHSM's continued commitment to improving the quality of care it provides to patients as well as making a significant contribution to wider health improvement.
- The 2010/11 league table for research activity places UHSM in second place nationwide for the number of patients taking part in research, at 21,476. Only Imperial College Healthcare NHS Trust had a larger number.
- With over 300 external research programmes undertaken per year, UHSM continues to engage with commercial companies, academics, research foundations and other NHS Foundation Trusts to undertake research programmes and work towards product commercialisation.

The following table gives examples of research initiatives that are being undertaken in 2011/2012 at UHSM, illustrating the variety of collaboration, and in particular, the Trust's extensive relationships with various commercial and non-commercial partners:

<b>Academic Institutional</b>		<b>NHS Partners</b>	
University of Jordan		University Hospital of Bristol NHS Foundation Trust	
University of Salford		NHS Cancer Screening Programmes	
University of Wales Swansea		Christie Hospital NHS Trust	
University of Manchester		North Staffordshire Combined Healthcare Trust	
University of Liverpool		Sheffield Teaching Hospital NHS Foundation Trust	
University of Edinburgh		Salford Royal Hospitals NHS Foundation Trust	
University of Birmingham		Wrightington, Wigan and Leigh NHS Foundation Trust	
Kings College London		Nottingham University Hospitals NHS Trust	
University College London		Royal Liverpool University Hospitals NHS Foundation Trust	
Lancaster University		Barts and London NHS Trust	
University of Durham		Royal Liverpool and Broadgreen University Hospital Trust	
University of Oxford		Liverpool Womens NHS Foundation Trust	
University of Nottingham		Central Manchester and Manchester Childrens University Hospitals NHS Trust	
University of Aberdeen		Leeds Teaching Hospital NHS Trust	
<b>Commercial Partners</b>		<b>Research/Charity Institutional Partners</b>	
NHSBT Tissue Service		National Institute for Health Research- Health Technology Assessment	
Merck Sharpe and Dohme		Cancer Research UK	
PneumRx Inc.		Macmillian Cancer Support	
Novo Nordisk Limited		Medical Research Council	
Micell Technologies		Department of Health Policy Research programme	
Novartis Pharmaceuticals UK Ltd		Dimpleby Cancer Care	
Abbott Diabetes Care		The Bubble Foundation	
Boehringer Ingelheim Ltd		Newlife Charity	
Cardoz AB		CDG Research Trust	
Lotus Pharmaceutical Co		British Heart Foundation	
GlaxoSmithKline		University of Manchester Skin Health Research Group	
Molnlycke Healthcare		Meningitis Research Foundation	
Roche Diagnostics GrmbH Diabetes Care		Ashema UK	
Afferent Pharmaceuticals Inc.		Myasthenia Gravis Association	

This table is not exhaustive, but clearly demonstrates the variety of the links that UHSM has with a number of partners from across the life science and healthcare sector. The MediPark will provide the opportunity to build on these links and relationships as will be demonstrated in the following sections.

## Specialisms

The particular fields of expertise for which UHSM are renowned will help to define the MediPark offer. The Trust's specialisms are recognised nationally and in some instances globally, with the three core operational strands of clinical, education and research activity combining to provide an offer which can potentially differentiate MediPark from other similar forms of development.

The unique specialisms of UHSM include:

- respiratory medicine;
- wound and burn healing;
- cancer;
- allergies;
- organ transplantation; and
- cardiovascular.

In addition to the Trust's ability to combine excellence in clinical, research and education to a nationally and globally recognised standard, it is worth noting the approach that the Trust takes to encouraging and driving commercial success for the companies it represents.

In developing the MediPark proposition the Trust specialisms as they exist today have proved a very useful starting point. However it should be noted that the Trust and the healthcare sector is likely to continue to evolve and change – it is important therefore that the MediPark concept is not too bespoke and retains an ability to adapt to changes in the research and development sector. This will ensure that the MediPark achieves longevity and sustainability over a long timeframe.

Specialisms have the potential to attract sector specific commercial occupiers to the MediPark who benefit from the knowledge base surrounding these specialisms and the opportunities that these represent for collaborative working towards advancing medical research and commercialising products, drugs and treatments. They are part of the MediPark USP.

Importantly in addition the MediPark has other strengths most notably proximity to Manchester Airport and the Airport City project, and in addition the designation it enjoys as part of the Greater Manchester Enterprise Zone. The MediPark can also make an important contribution to the wider NW Life Sciences and healthcare sector through the establishment of synergistic relationships with businesses located throughout the region. The EZ brings a near term set of financial incentives but also an increased profile and opportunity to attract investment.

## Manchester Academic Health Science Centre

In 2008, the Manchester Academic Health Science Centre (MAHSC) was established to formally underpin the development of Greater Manchester as a world leader in health research. MAHSC, is a partnership between six Greater Manchester NHS organisations, including UHSM and The University of Manchester, which aims to align service delivery with research and education.

The presence of the MAHSC within Greater Manchester has led to the accelerated development of new treatments, technologies and health services, targeted to meet unmet clinical need. This demonstrates a joined-up forward thinking approach to research, service delivery and growth which is unique to Greater Manchester. MediPark occupiers will benefit from this collaborative and efficient network of knowledge, allowing them to make connections and source information more quickly and more cost effectively than in other geographic locations.

The presence of MAHSC within the South Manchester Economic Corridor will be a significant competitive advantage of this location. The seven founding partners of MAHSC combine excellence in academia, clinical service delivery, research management and education. In combination they employ 34,750 staff with an annual turnover of £3.2 bn<sup>2</sup>. The competitive advantage will have a large part to play in the attraction of occupiers to MediPark.

## Greater Manchester Academic Health Science Network

The Greater Manchester Academic Health and Science Network has very recently been established. The network has been established to improve health, create opportunity for wealth and employment through building on assets and adopting effective methods through which reliable implementation of agreed best practice can be taken forward across the healthcare network.

The network is focussed on transformational health informatics and intelligence systems through which world class knowledge management and transfer networks can be put in place. This should lead to the network being recognised as a global leader for clinical trials and product testing – crucial in underpinning the MediPark strategy.

The network will initially focus on two key themes – **preventing people from dying prematurely and protecting people from avoidable harm**. Using the NHS Change model it is the intention to deliver measurable improvement across the network in these areas.

## The UK National Aspergillosis Centre

UHSM hosts the UK National Aspergillosis Centre, commissioned by the Department of Health to provide long term care for patients with chronic pulmonary aspergillosis. This condition is one of several caused by the airborne fungus *Aspergillus*.

Most recently the team has been successful in being awarded grants from several prestigious bodies including the Manchester Research Council and The Wellcome Trust. Expertise in the clinical management of chronic pulmonary aspergillosis and the sophisticated diagnostic testing and monitoring required to support high quality clinical care has contributed to the care of patients with all forms of aspergillosis. This facility is a physical asset for the Trust and will be a unique selling point for specialised life science companies looking to locate within the MediPark.

<sup>2</sup>MAHSC Website: <http://www.mahsc.ac.uk/whoweare/> [accessed August 2012]



## Respiratory and Allergy Clinical Research Facility (RACRF)

The UHSM Respiratory and Allergy Clinical Research Facility (RACRF) is a partnership between the University of Manchester (UoM) and UHSM. Their goal is to translate advances in laboratory and experimental research into improved lung health for individuals and the population as a whole.

During 2011-12 the RACRF secured further funding of £2.5 million from the NIHR to support early phase research in the areas of personalised treatment of respiratory infections, asthma and allergy, chronic obstructive pulmonary disease and cough over the next 5 years.

The RACRF provides an infrastructure – people, space and equipment – which allows clinicians, scientists and researchers to undertake experimental research and early phase clinical trials. The RACRF is part of the North West Lung Centre (NWLC) which is a tertiary referral centre for a catchment area of over 5 million people. This facility is a physical asset for the Trust and will be a unique selling point for specialised life science companies looking to locate within the MediPark.

In summary both the Trust and the wider GM network can readily point to a range of ground breaking research led programmes that will provide an outstanding base from which to develop the MediPark concept.

The development of land adjacent to UHSM will take advantage of opportunities presented economically at the global, national and regional level. The Strategic Regeneration Framework sets out the physical strategy through which the UHSM site could contribute to this nationally important initiative. The following section details the UK Government's current approach to promoting life sciences and the various growth sectors, and how this is reflected in South Manchester.

## National Economic Drivers

On December 2011, the Government launched the Strategy for UK Life Sciences to help life science businesses grow and succeed. The strategy focuses on the health-related aspects of the sector. It is a long-term strategy, looking forward ten to fifteen years, building on the March 2011 Plan for Growth. The Government recognises this sector as a key source of high-skill, high-tech jobs.

The UK government has identified life sciences and health related industries as a core strength but one which is facing competition from other global competitors in a market already estimated to be worth £1,000 billion and growing at a rate of c.10-12% per annum.

Investment and tax measures in this sector will contribute towards making the UK a highly competitive location for life science companies to grow and invest.

The Strategy for UK life sciences is based on three pillars:

- **Building a UK life sciences ecosystem:** the Government will make it easier for researchers to commercialise academic research, will place clinical research at the heart of the NHS, and will empower patients to participate in research;
- **Attracting, developing and rewarding talent:** the Government will introduce measures to ensure that the UK attracts and nurtures world-leading talent and develops scientific excellence, These measures will also ensure that the UK offers exciting and rewarding careers for clinicians, scientists and technicians from all around the world
- **Overcoming barriers and creating incentives for the promotion of healthcare innovation:** the Government is introducing measures to incentivise early-stage investment and nurture the best innovations through the translational funding gap to a point at which they can secure follow-on investment. The Government will continue to reduce the bureaucracy of setting up clinical trials to ensure that patients have access to promising, cost-effective new treatments.

## Life Science Growth Sectors

The life sciences worldwide are a key driver of economic growth, accounting for substantial investments in innovation and research, as well as many high value jobs. It is a sector with significant growth potential in the future, but it is currently faced with many challenges and it is undergoing major structural change<sup>3</sup>.

Within the life sciences sector, healthcare and biosciences alone comprise around 10% of most developed nations GDP (2007)<sup>4</sup>. Meanwhile, the pharmaceuticals market is forecast to reach £795bn by 2020, with R&D in the sector expected to grow by 2.5% p.a. up to 2015<sup>5</sup>.

Research undertaken by SQW (2012) has identified the following life science growth sectors both nationally and globally:

- **Industrial biotechnology:** The application of biotechnology for industrial purposes, including manufacturing, alternative energy and biomaterials;
- **Medical technology:** Expected to grow by 10% p.a. up to 2015, with the global industry expected to be worth £300bn. Within this sector, the medical devices market, which involves developing and manufacturing devices for curing, treating or preventing diseases, was worth £310bn with growth of 7% per annum;
- **Biologics market:** The global biologic therapeutic drug market is valued at an estimated £100bn in 2010 and is expected to reach £150bn by 2015, a 9.9% p.a. growth rate forecast up to 2015. Driving this growth is the need for a more extensive drug pipeline, aggressive targets against challenging diseases, a push to pursue biosimilars, and enabling manufacturing technologies that reduce the cost to producing profitable products.

In some respects the UK punches above its weight compared to other countries, having significant strength in depth in the life sciences and pharmaceuticals sector in particular, according to the government. Indeed, the UK ranks second behind only the US<sup>6</sup>, with 37 of the top 50 global pharmaceutical companies having 60 sites between them in the UK, employing 52,000 staff.

Within the UK economy, the life sciences have a relatively large impact, with the pharmaceutical industry alone investing more in R&D (£4.5bn in 2007) than any other business sector, with a trade surplus of £4.3bn in 2007. In medical biotechnology, the UK leads Europe in terms of the number of drugs in clinical development (over 20% of the total globally, whilst over 20% of the world's top medicines were developed in the UK), and the medical technology sector is growing rapidly, again leading Europe, with over 2,000 active companies.

There are now over 4,500 firms in the life sciences within the UK, employing some 165,000 people. Figures, produced by SQW (2012) illustrate the strength of the UK life sciences sector, by turnover, employment, and number of companies.

<sup>3</sup> SQW (2009)- A Market Assessment for a Proposed MediPark, taken from GHK (2009)- Life Sciences and Medical Technologies

<sup>4</sup> SQW (2012)- A Market Assessment for a Proposed MediPark

<sup>5</sup> SQW (2012)- A Market Assessment for a Proposed MediPark

<sup>6</sup> HM Government (2012) Life Sciences Blueprint



Figure 4: Sectoral breakdown

## Manchester Life Sciences

The area surrounding UHSM represents one of the country's major clusters of life sciences, academic research, and healthcare facilities. The life sciences cluster in the North West region is the largest outside of the Golden Triangle<sup>8</sup>, with a particularly strong role in the pharmaceuticals industry, with AstraZeneca alone employing over 7,000 people. There is a significant concentration of activity in and around Manchester with the MAHSC, regulatory bodies such as NICE, health-related charities, a vibrant start-up community focused primarily on the incubation and grow-on (including a major science park) facilities along the Oxford Road Corridor, as well as some large multi-national corporations that have invested here.

More generally, the science, technology and innovation landscape within the Manchester City Region (MCR) is highly diverse in terms of geographical location, facilities, capabilities and organisational bodies. There are four universities and over 75 research facilities and institutions across the area. Organisations within Greater Manchester mainly the universities, were responsible for almost 6% of all UK publications during the period 2006 and 2008. Forty per cent of these were produced with foreign collaborators, indicating the quality and depth of research as well as the extensive ties to both local and international organisations. More recently, Professor Andre Geim and Professor Kostya Novoselov from the University of Manchester, were awarded the 2010 Nobel prize in Physics for their work with Graphene.

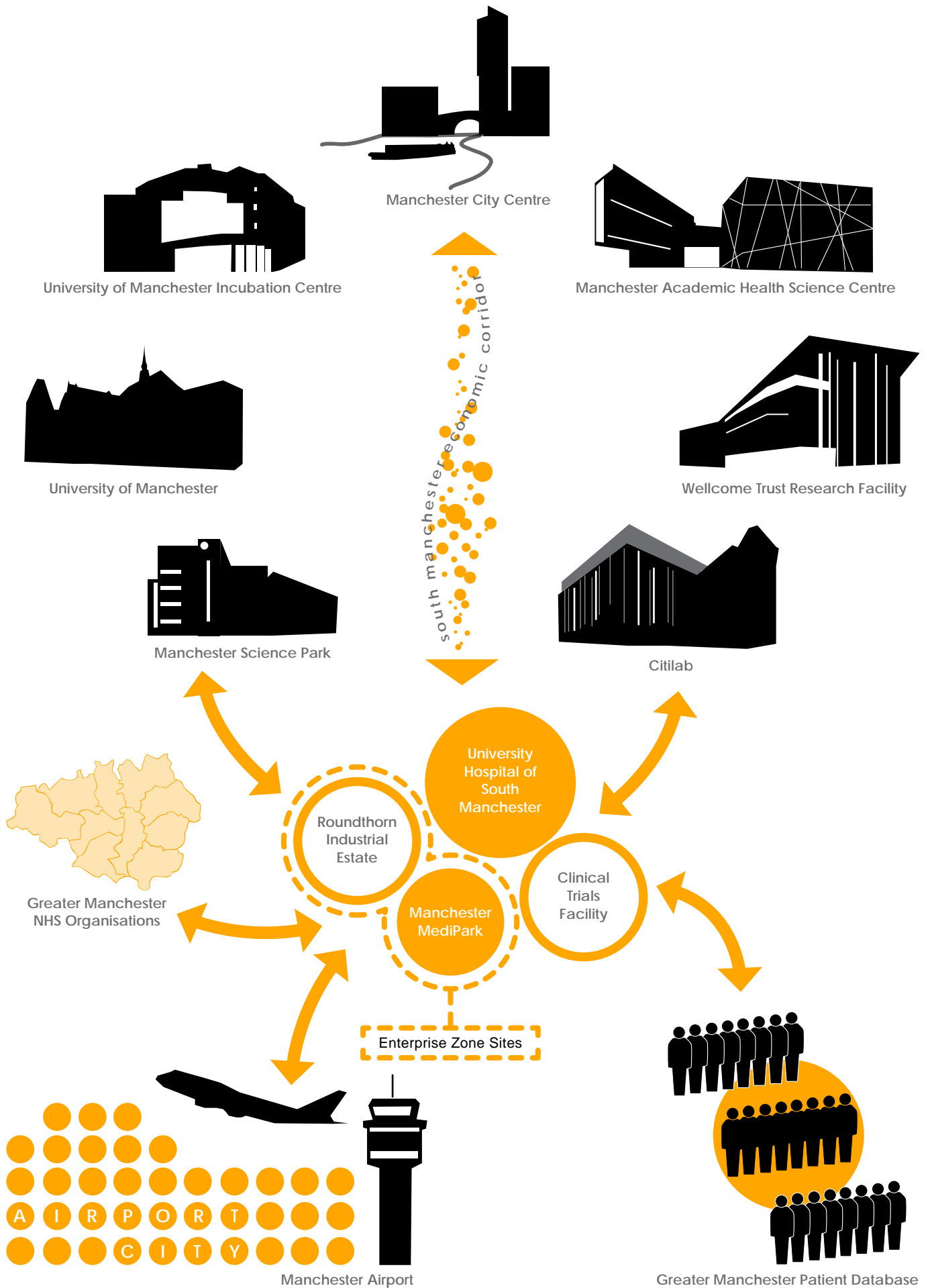
Greater Manchester currently supports 87 core life science companies<sup>9</sup> and 125 non-core life science companies<sup>10</sup>, making a total of 212. During the past two years, Greater Manchester has gained an additional 62 companies either relocating to Greater Manchester or starting up within Greater Manchester, giving the sector significant growth.

The strengths of the conurbation are ably demonstrated by looking at the South Manchester Economic Corridor, with its focus towards life science assets. These in combination make MediPark an attractive location to prospective new occupiers. The wealth of life science assets, the location of the Airport and the presence of the Enterprise Zone, combine to present a strong economic force from which massive benefits can be generated.

<sup>8</sup> SQW (2009) - A Market Assessment for a Proposed MediPark. The Golden Triangle is the area bounded by Cambridge, London and Oxford

<sup>9</sup> The range of core companies in the region encompasses large mature global pharmaceutical companies (such as Astra-Zeneca, Bristol Myers Squibb, Eli-Lilly, GSK, Novartis, Sanofi-Aventis, Teva), a significant analytical and healthcare presence (e.g. Shimadzu, Waters, Molnlycke, Baxter, Fresenius-Kabi, Unilever, Depuy (J&J) SL, Applied Biosystems, Thermo Fisher, Advanced Medical Solutions, Gen-Probe) growing biotech companies (e.g. Epistem, Qiagen Manchester) and many spinout and start-up companies formed during the past 10 – 12 years. Information provided by MIDAS.

<sup>10</sup> A range of non-core companies in the region encompasses supply chain companies such as lab fit-out companies, Equipment & other suppliers; consultants & support services including technology transfer commercialisation organisations; accommodation, design & facilities providers; and legal & financial advisors and fund managers. Information provided by MIDAS.



## Manchester Airport City Enterprise Zone














In support of the Government's core belief that economic growth and job creation should be led by the private sector, the 2011 Budget saw the Chancellor introduce Enterprise Zones (EZs) as an accelerator of change to the economy. Manchester Airport City has been identified as a location for an EZ, alongside 21 other areas across England. New businesses that locate within the EZ will benefit from business rate discount worth up to £275,000 per eligible business over a five year period, a simplified planning regime and superfast broadband.

The **Manchester Airport City Enterprise Zone Framework Plan (EZFP)** is a key document which sets out the basis upon which the EZ stakeholder group intend to take forward the development of the proposed EZ area.

The long term vision for the EZ area covering the next 15 years is established within the Framework Plan. The designation of the EZ is designed to create new jobs and opportunities for local people and the opportunity presented by the Manchester Airport. The MediPark site sits within the EZ area at the southern tip of the Corridor. The site is also captured within the West Wythenshawe Local Plan ( WWLP) produced by Manchester City Council to guide development and economic growth within the local area.

There are a range of economic drivers that assist in the development of the MediPark.

Key

-  MediPark
-  Roundthorn
-  Rowlands Way (Wythenshawe Town Centre)
-  Atlas Business Park & Emerson Properties
-  Airport City North
-  World Logistics Hub
-  Motorways
-  Major Vehicular Routes
-  Railway lines
-  Metrolink Future Extension (Under construction)
-  Metrolink Line
-  Manchester Airport
-  UHSM

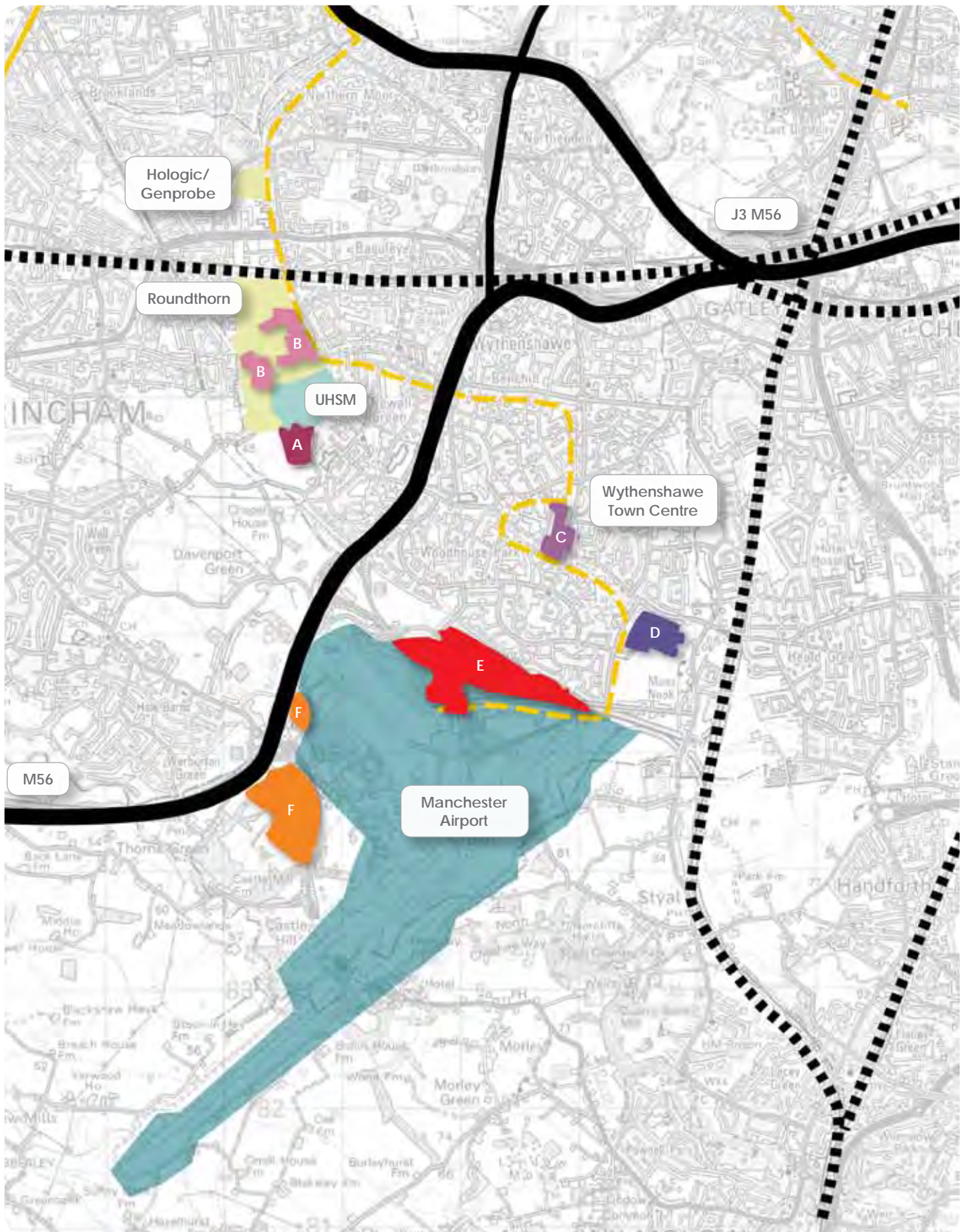


Figure 5: Manchester Airport City Enterprise Zone

Economic Drivers	
Airport City Enterprise Zone	<p>The Manchester Airport City Enterprise Zone is designed to create new jobs and opportunities for local people through the attraction of new businesses. The incentive to occupiers is provided in the form of a business rate discount worth up to £275,000 per eligible business over a five year period, in addition to a simplified planning regime and superfast broadband.</p> <p>Collectively the 10 Airport City EZ sites provide some 116 hectares of developable or re-developable land that offer the scale and significance to become a strategic economic and employment driver for the wider Greater Manchester area. The proposed Medipark site is contained within the boundary of Airport City EZ and occupiers will therefore benefit from the incentives.</p>
University of Manchester	<p>The University of Manchester operates as an economic powerhouse in its own right. As of 2012, the University of Manchester has around 39,000 students and 10,400 staff, making it the largest single-site university in the United Kingdom and one of the top 30 research universities in the world.</p> <p>The University works in association with UHSM on various research projects. Researchers at UHSM have contributed to the excellence that the UoM achieves in its status as a top five ranking university. In 2009, research projects were supported by over £6.2m in external funding. The findings of this research has and is still informing local and national practice and policy, with over 300 peer reviewed papers published during 2008.</p>
Manchester Airport	<p>Manchester Airport is the busiest airport in the UK outside of London providing access to over 190 locations around the world. Passenger traffic at Manchester Airport is projected to more than double by 2030, from 19 million today to 40 million. Such increased activity will generate significant ancillary employment growth, not only in passenger related services but in the wide range of logistics associated with air freight.</p>
Manchester Airport City	<p>Manchester Airport City is the overarching title used to describe a group of land and property assets adjacent to the Airport. A long term development strategy is now in place that will see over 250,000 sqm of new commercial floorspace developed around the Airport to support Airport growth but also drive sub regional economic development.</p> <p>The MediPark is an integral element of Airport City. MediPark occupiers will be able to benefit from the Airport's international links, making it easier, quicker and more cost effective to import and export freight to various locations. Passenger transport is also facilitated by the proximity of the airport, making international business meetings easier to attend. Visitors to the MediPark are able to transfer easily, making the MediPark suitable for training events and conferences. The Manchester Airport City Masterplan seeks to improve direct access by public transport between the Airport and Wythenshawe including: a strengthened bus network, cycle and pedestrian linkages, and also the construction of the Metrolink route, connecting UHSM and Wythenshawe to the airport.</p>
Roundthorn Industrial Estate	<p>Roundthorn Industrial Estate, under the Enterprise Zone initiative has the potential to transform its offer from industrial estate to a world-class business location supporting UHSM, the MediPark, Manchester Airport and Airport City. The development opportunities at Roundthorn will be complementary to MediPark and will reinforce the MediPark brand by providing move-on space for MediPark occupiers. Existing flexible and economic space is also available at the existing Roundthorn Estate. It has the potential to provide larger floorplates for occupiers, which will appeal to companies which successfully commercialise and increase the size of their operations.</p>



Economic Drivers	
Manchester Science Park	<p>Manchester Science Parks (msp) started operations in 1984 with one multi-occupancy building. MSP has subsequently developed to become one of the UK's leading science parks and now operates across four sites in Greater Manchester, accommodating around 145 tenant companies. MSP is seen as an active partner in the development of Manchester as a dynamic regional capital at the heart of the knowledge economy.</p> <p>The development of MediPark is considered to be complementary to MSP, with different locational advantages and facilities than that provided within the four MSP locations. The two facilities combined will ensure that Manchester is able to cater for all occupier demands within the life science sector thereby strengthening the reputation and economic strength of the South Manchester Economic Corridor.</p>
Manchester Academic Health Science Centre	<p>In 2008, the Manchester Academic Health Science Centre (MAHSC) was established to formally underpin the development of Greater Manchester as a world leader in health research. MAHSC, is a partnership between six Greater Manchester NHS organisations, including UHSM, and The University of Manchester, that aims to align service delivery with research and education.</p>
The University of Manchester Incubation Centre	<p>The University of Manchester Innovation Centre Limited (UMIC) provides high quality state of the art biotech and hi-tech facilities including laboratories and office space. UMIC provides space specifically for start-ups, incubator tenants and SME's in premises located in three locations within the City Centre. MediPark will provide the opportunity for companies to expand from the incubation facilities provided by UMIC, thereby freeing up space for new companies and spin-offs to develop in the supportive environment that UMIC provides.</p>
Citilab	<p>Citilab, The former Royal Eye Hospital is a new 100,000 sq ft biomedical centre of excellence, located adjacent to the University of Manchester within the clinical academic campus. Citilab aims to attract bio health companies to develop new products and services designed to meet the needs and expectations of patients.</p> <p>There have been a number of confirmed pre-lets; to TRUSTECH, an NHS organisation which aims to improve healthcare through the development of innovative products and services; to The Manchester College who will use the space for medical training; and to The Central Manchester University Hospitals NHS Foundation Trust Charity. The rest of the space has been purpose built for wards for clinical trials, biomedical laboratories and areas for networking.</p>
Welcome Trust Research Facility	<p>Established in 2001, the facility supports clinical research studies from a wide range of disciplines, led by investigators in both adult and paediatric specialities. Providing a comprehensive research environment with a highly-skilled clinical research workforce, the facility supports investigators to conduct research studies in a timely and effective manner.</p>
Greater Manchester NHS Organisations	<p>The combination of Greater Manchester's NHS organisations in the form of Acute Trusts, Primary Care Trusts and Mental Health Trusts, have access to a far reaching and diverse patient database.</p>

## Economic Drivers

<p>Greater Manchester NHS Organisations</p>	<p>The Greater Manchester NHS organisations, as MAHSC partners, are some of the most highly rated Trusts as recognised by numerous Health Service Journal accolades. The partners comprise three Acute Trusts, two Specialist Trusts and one Primary Care Trust, and deliver a broad provision of clinical care, including:</p> <ul style="list-style-type: none"> <li>• cancer</li> <li>• mental illness</li> <li>• neurology and dermatology</li> <li>• lung disease</li> <li>• maternal and fetal health</li> <li>• cardiovascular and musculoskeletal diseases</li> <li>• e-Health using bioinformatics and electronic patient records to link the primary and secondary care sectors</li> </ul> <p>Pan-partnership strengths include diabetes and cancer.</p> <p>The MAHSC partners work together to translate world-leading research and rapidly adopt innovations into clinical and healthcare practice for patient and population health improvement.</p>
<p>Private Sector</p>	<p>The private sector is already well established in the sub -region. Businesses such as Gen Probe / Hologic, Waters and Kratos have a strong business in the local area. There is a clear opportunity to leverage further investment via the supply chain related to these existing healthcare occupiers.</p>

## Occupiers

There has been a significant amount of demand analysis undertaken which has led to the identification of MediPark occupiers, which will provide a starting point to drive forward a more detailed marketing campaign to be undertaken by a private sector developer/ investor. Identification of particular types of occupier leads to an understanding of the scale of the demand for such space. The types of space requirements are summarised by the table below.

Type 1: Healthcare Related Companies	Type 2: Research & Development	Type 3: Supporting Facilities
Core Occupiers	Specialist Occupiers	Complementary
Commercially driven companies with larger space requirements which benefit from the cumulative MediPark package. Underpinned by a key anchor tenant.	Specialist life science businesses and research departments of larger commercial life science companies who benefit directly from UHSM's specialisms, access to patients, equipment and the knowledge pool.	Supporting uses which complement UHSM and the MediPark to produce a rounded and complete real-estate offer.
<ul style="list-style-type: none"> <li>• Light industrial/manufacturing</li> <li>• Office space</li> <li>• High-tech workspace</li> <li>• Health related supply chain companies</li> <li>• Digital healthcare</li> </ul>	<ul style="list-style-type: none"> <li>• Wet labs</li> <li>• Dry labs</li> <li>• Fast track clinical trial facilities</li> <li>• Allergy centre &amp; commercial kitchens</li> </ul>	<ul style="list-style-type: none"> <li>• Training facilities</li> <li>• Central Hub:                             <ul style="list-style-type: none"> <li>• Restaurants</li> <li>• Creche</li> <li>• Cafe/Leisure</li> <li>• Florist</li> <li>• Banks</li> <li>• Gym</li> <li>• Convenience retail</li> <li>• Dry cleaners</li> <li>• Pharmacy</li> </ul> </li> </ul>

The MediPark offers the following advantages to all three types of occupiers:

- Exemption from business rates up to £55k per annum per company, and the wider benefits accruing from being part of the Enterprise Zone.
- A high quality physical environment which is highly accessible by car and public transport. MediPark will provide a 'campus- based creative environment' offering facilities such as restaurants, crèche, gym, café and convenience foodstore and retail facilities
- The location of the Airport within 4 miles of the MediPark, offering easy access to national and international locations.

Each of the potential occupier types is examined in more detail.

## Healthcare Related Companies

There is an identified demand for larger floorplates from commercially driven healthcare and life science companies who benefit from an association with the MediPark brand and the support services provided within the MediPark environment. These occupiers will be key to underpinning the MediPark offer and can benefit from proximity to the specialist areas of research and education provide by UHSM. However, because these businesses may be further along the supply chain from the Research & Development (R&D) network, they may not need to be located directly adjacent to the hospital site.

Occupier demand is for office space, light industrial/manufacturing and high-tech workspace. This type of space will give growing businesses the opportunity to expand as they become more successful, and will also allow large commercial companies to operate their office and manufacturing functions within the MediPark alongside their research and clinical trailing operations captured within the R&D sector. Supply chain companies requiring larger office and manufacturing operations including NHS suppliers and Medipark suppliers who benefit from being located in a healthcare and life science community, in addition to a highly connected location nationally and internationally, will also form part of this occupier group.

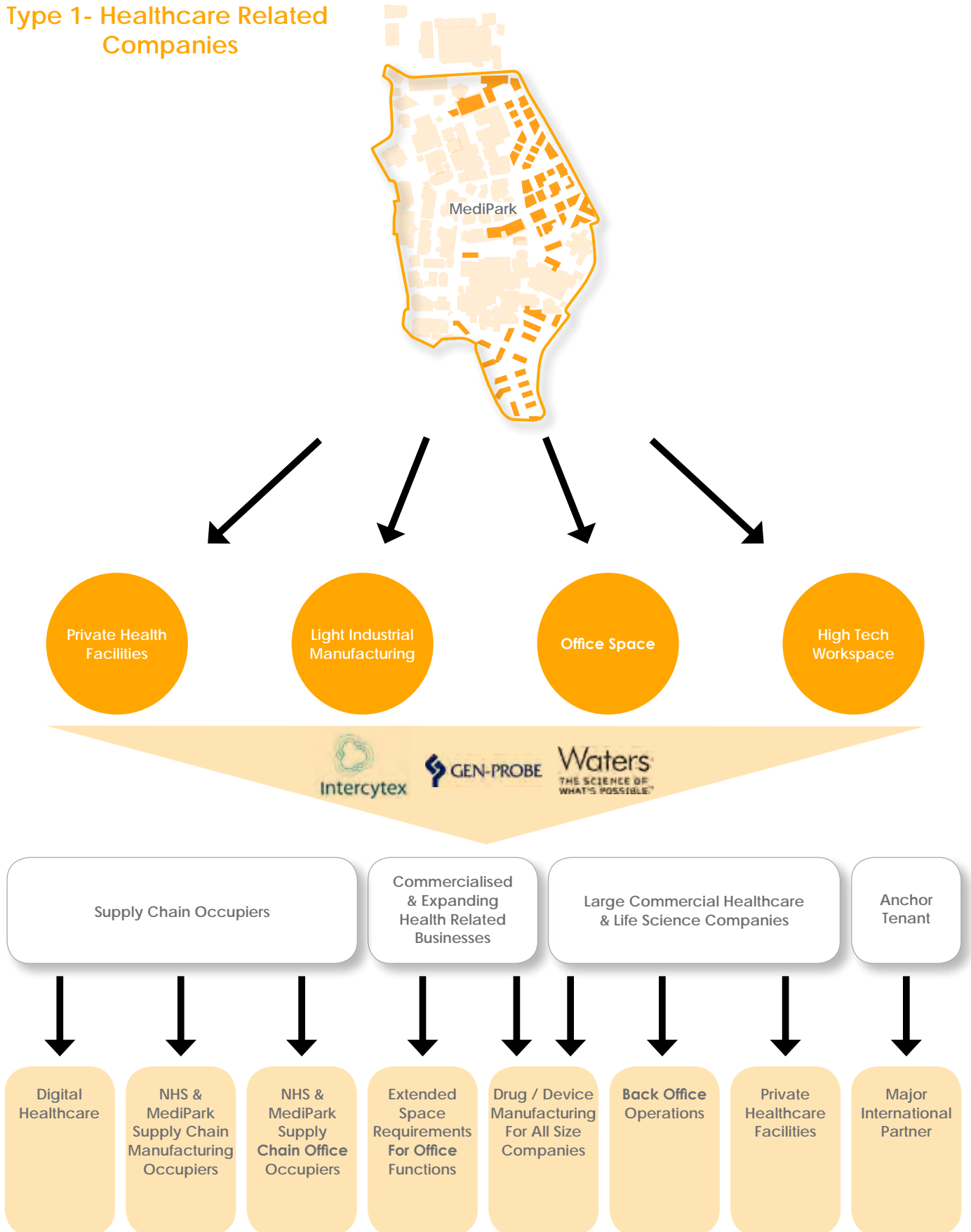
Private healthcare has been identified as a high growth industry. The overall market has expanded particularly within the last 5 years as a result of the growing shift from public to private provision, with the NHS making increasing use of private sector healthcare to cut waiting lists. The location of a small private healthcare facility adjacent to UHSM could be be part of a wider set of uses, but should not be a key driver of the scheme.

The facilities provided for digital healthcare companies represent another area of growth within the healthcare sector. Users will benefit from a Medipark location through the commercial opportunities provided by the MediPark supply chain. Research analytics companies, IT support and data companies will have a synergistic relationship with other occupiers who require specialist digital healthcare companies to enhance their operations.

The Medipark will also be a suitable location to generate commercial opportunities from healthcare companies elsewhere within the South Manchester Economic Corridor, such as Manchester Science Parks and Citilabs.

The presence of a complementary MediPark anchor tenant will be a key focus of the location. The prime sponsor will establish significant commercial enterprise and an educational partnership which will be a major draw for the other MediPark occupiers. The anchor tenant will form a symbolic relationship with UHSM and MAHSC.

Type 1- Healthcare Related Companies



## Research and Development

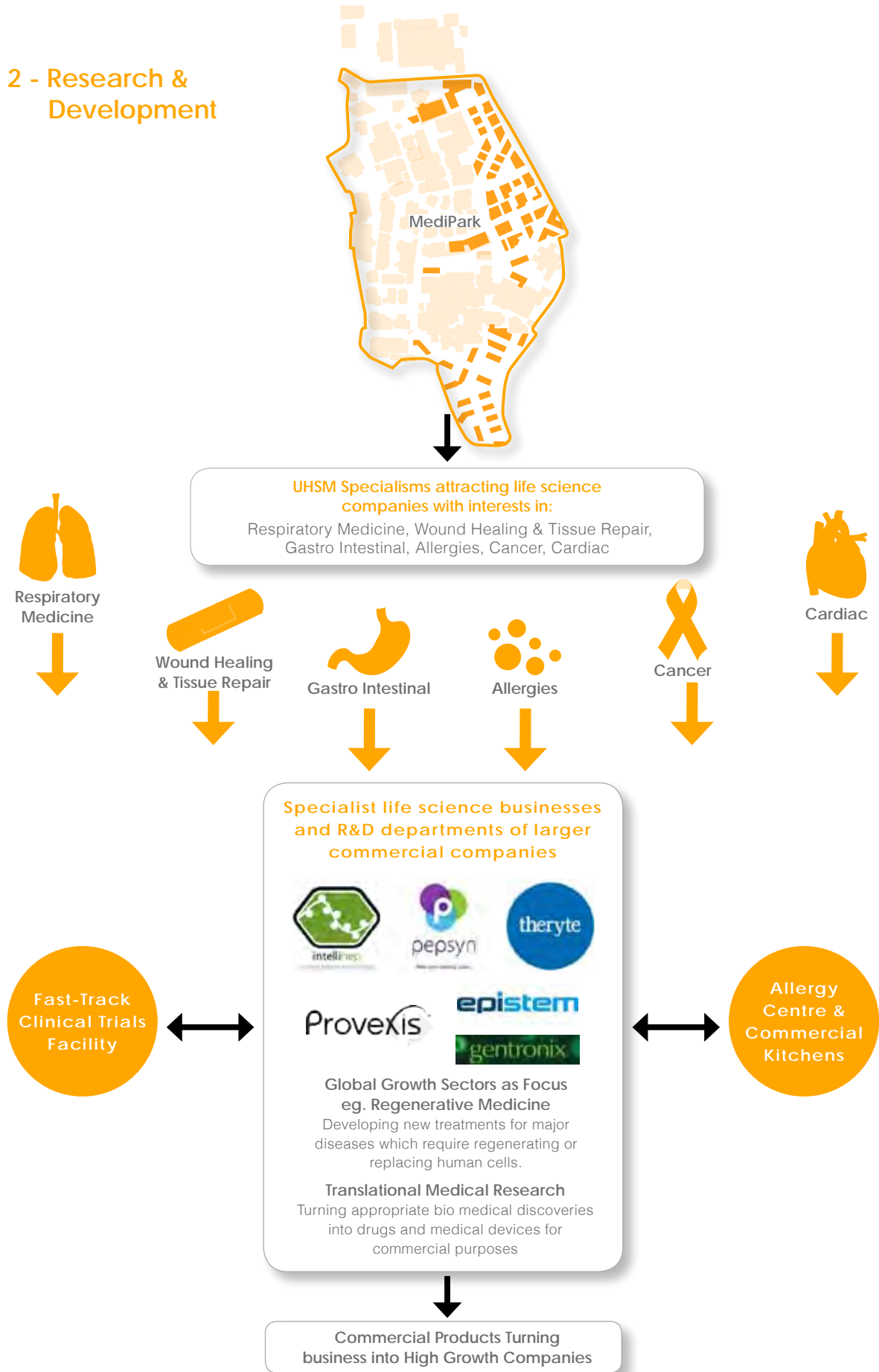
These occupiers located within the MediPark relate to uses which have an operational requirement to be located within close proximity to a hospital to enable them to take advantage of the facilities available.

Our research suggests that MediPark will be particularly attractive to life science and healthcare companies who carry out medical research and clinical trailing in the UHSM specialist areas, as illustrated by the following figure. These companies can be either small to medium sized enterprises, or R&D departments of larger commercial life science companies.

In practice, an R&D business which specialises in therapies and treatments may wish to locate at MediPark as a business location for the following reasons:

- UHSM has specialist capabilities which differentiate it from other locations. The specialist areas of clinical practice, research and education combine to make UHSM a 'centre of clinical excellence'. A company which carries out research and clinical trials in lung cancer therapies can benefit from access to key thinkers within the industry, access to a patient pools specific to UHSM's specialist areas and access to world class technology facilities.
- MediPark will provide a supportive and nurturing environment where businesses can grow and where larger commercial life science companies can increase their chances of commercialising drugs, products and treatments. The presence of UHSM adjacent to the MediPark, and the facilities within MediPark itself, will ensure that the core skills, knowledge and support is available to allow MediPark SME's to commercialise products in a reduced risk environment.
- MediPark will provide a highly vibrant and creative network community where occupiers can collaborate, where funding can be accessed and where the networking advantages of the life science assets within the South Manchester Economic Corridor can be harnessed. These networks and relationships are particularly important to companies as they grow in size and successfully commercialise their products.

Type 2 - Research & Development



## Supporting Facilities

The MediPark provides an opportunity to introduce uses that will support the core offering which include ancillary facilities for UHSM and the Medipark staff.

Training facilities and a fast-track clinical trials facility are very much part of the supporting infrastructure that UHSM can bring to MediPark.

The training facility would be available for a variety of users from local MediPark companies to international global companies. All users will benefit from the specialist areas of teaching held by the Hospitals and Universities of Greater Manchester.

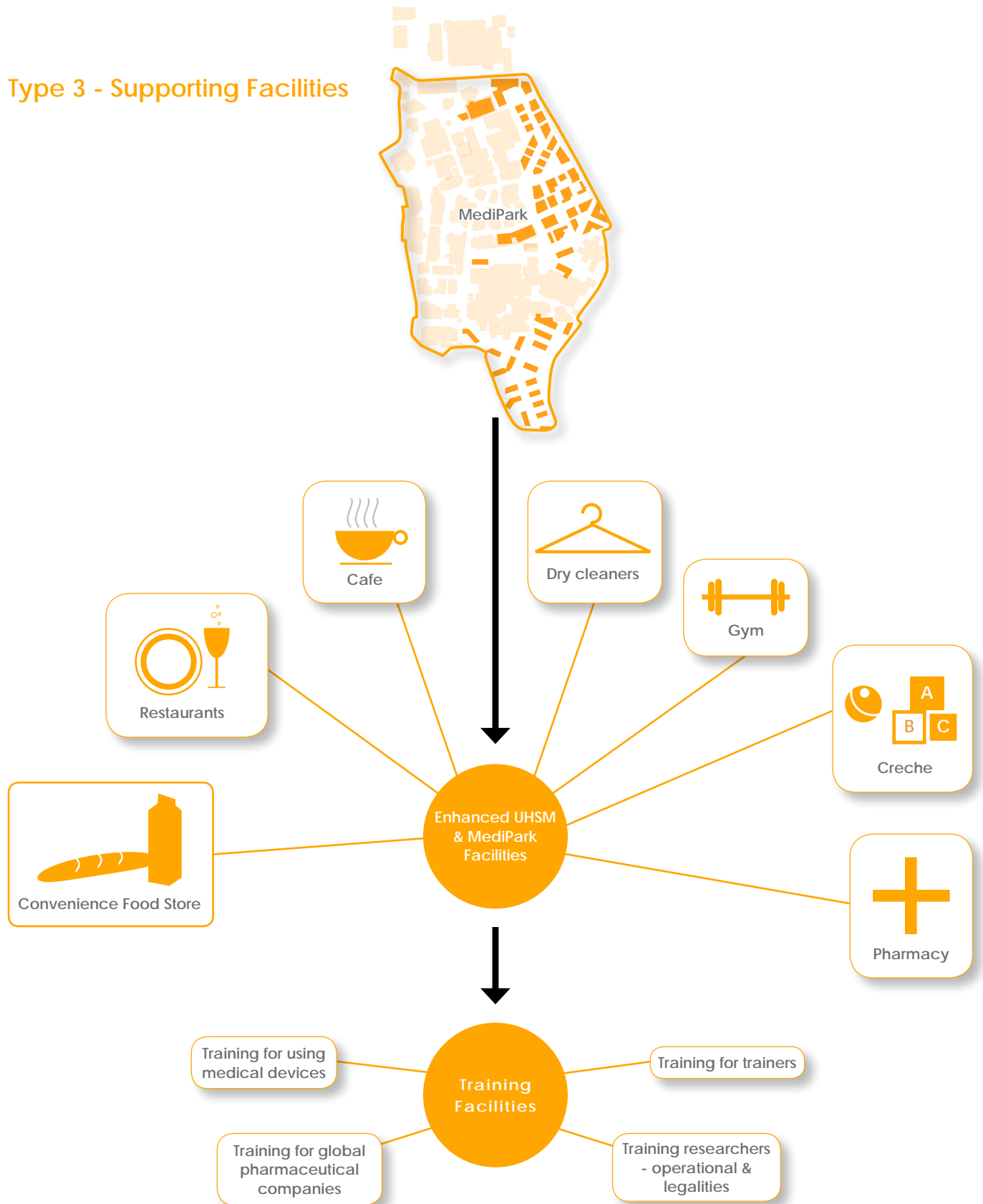
The fast track clinical trials facility would add to the unique selling point of MediPark for occupiers, providing a fast and efficient service for medical trials. The fast track service will be designed to facilitate the development and expedite the clinical trial process to get important new patents earlier and reduce expense for the life science company

The enhanced ancillary facilities for UHSM and the Medipark staff will provide an attractive and engaging environment to work and play. Such facilities are necessary to attract all types of occupiers to the MediPark, and will additionally enhance the quality of the working environment for existing UHSM staff.

Facilities including a restaurant, a convenience foodstore, a pharmacy, a crèche, a café, a dry-cleaners and a gym will be supported by 5,900 UHSM Staff, the 500,000 patients treated annually at USHM and the 4500 MediPark employees. The hub needs to be of sufficient scale to attract occupiers and customers from across the wider Medipark site.



### Type 3 - Supporting Facilities



## 4 FRAMEWORK CONTEXT

The following section identifies the planning policy position, and the economic position, focusing on the Greater Manchester and City of Manchester Context.

### Local Planning Policy

The following diagram illustrates the various tiers of planning policy of relevance to Manchester MediPark



Figure 6: Planning Policy Context

### Manchester Core Strategy and Proposals Map

The Manchester Core Strategy and subsequent Proposals Map were adopted on 11th July 2012. This forms part of the Local Development Framework and the statutory planning guidance forms the basis for planning decisions.

The Core Strategy outlines the key vision for Manchester over the plan period until 2027. It also sets out those planning policies which will help to deliver this vision. The Core Strategy aims to further reiterate the aspirations set out in the Wythenshawe Strategic Regeneration Framework (SRF) which proposes closer integration between the South Manchester economic assets to give Wythenshawe residents access to a full range of employment and training opportunities. The development of the East and West corridors within Wythenshawe are planned within the SRF to link Wythenshawe Town Centre with the Airport, the Hospital and other key employment locations.

The Core Strategy outlines a number of key challenges for the Wythenshawe area:

- High rates of worklessness and deprivation;
- Limited sites with potential for development;
- Better links required east to west across the area to connect Wythenshawe's residents to opportunities for employment and training; and
- Limited housing choice.

The site of the MediPark is allocated as an Economic Improvement Area within the adopted Core Strategy Proposals Map.

The Core Strategy articulates that UHSM is expected to develop further as a health facility and presents an opportunity for growth in research and development particularly related to the bio-sciences. The Core Strategy outlines generally that demand for future employment across Manchester is expected to be driven by: logistics and distribution; environmental technologies; and healthcare and biotechnology.

The Core Strategy outlines the aim of developing a 'MediPark' on the site of UHSM and this is due to its location in a growth area within the South of the Manchester City Region and that these improved health facilities will be important in improving the health of the local community. The relevant core strategy site specific policies are shown in the following table.

Policy Document	Policy Reference	Policy Wording
Manchester City Council Core Strategy – Adopted July 2012	Policy EC10	<p>Wythenshawe is expected to provide 55 hectares of employment land within use classes B1a Offices, B1b/c Research and Development and Light Industry and B8 Logistics and Distribution. The majority of economic development is to be focussed primarily at a number of key sites, one of which is the University Hospital South Manchester which has been identified as being suitable for growth related to healthcare, biosciences and with ancillary offices.</p> <p>Development of infrastructure provision will also be supported to strengthen transport connections between Roundthorn Industrial Estate, University Hospital South Manchester, Airport City and Manchester Airport. The Council seeks to enhance these key employment uses, and the links between them.</p>
	Policy EC12	<p>UHSM is allocated as a Strategic Employment Location. The policy outlines the plans that University Hospital South Manchester has to expand its operation, emphasising its role in key health care areas, bio-science and pharmaceuticals. Hospital expansion will also include a mix of education and conference facilities, clinical trial labs, fitness/well being centre, an innovation centre, incubator units, and hotel and ancillary offices.</p>
	Saved Policies from Unitary Development Plan – Adopted in July 1995	Policy WW2
Policy WW3		<p>Specifically relates to the Environmental Improvement and Protection of existing areas of woodland in West Wythenshawe, this includes Fairywell Wood.</p>

## Local Planning Designations

The local planning designations are illustrated in the following figure.

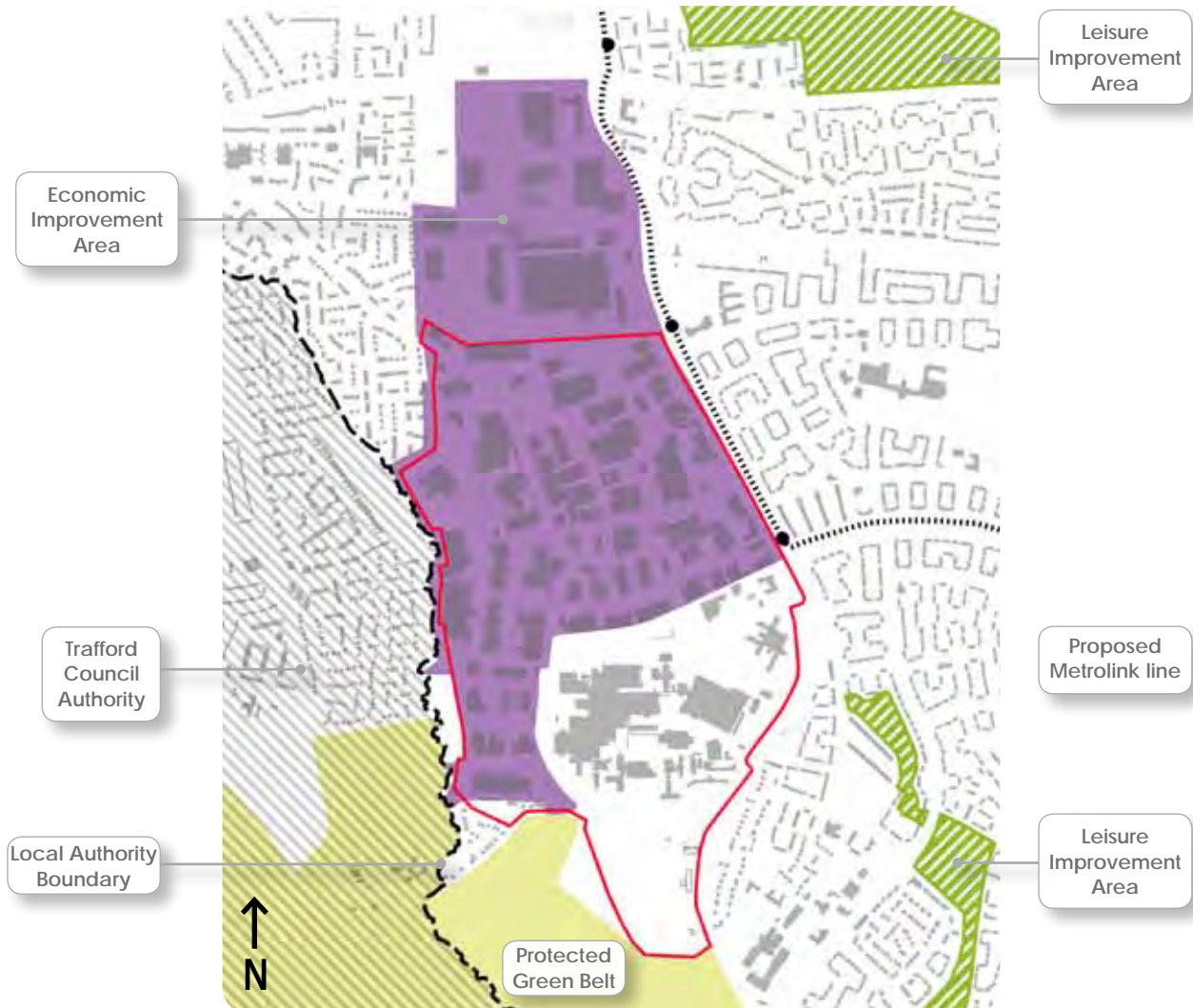
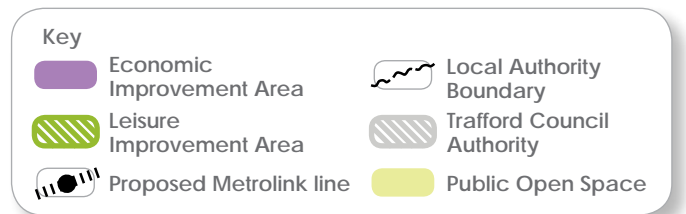


Figure 7: Local Planning Designations



## Wythenshawe Strategic Regeneration Framework

Whilst the Manchester Core Strategy illustrates the city-wide approach to development, it is also necessary to consider to the Wythenshawe Strategic Regeneration Framework (SRF) produced in 2003 to understand the locally established vision for Wythenshawe.

The SRF highlights the clear ambition that Wythenshawe will be the focus of new investment and job creation, to make the most of the expansion of Manchester Airport, to ultimately support the welfare of the residents of Wythenshawe and Manchester as a whole.

The SRF makes reference to a number of key objectives which have implications for UHSM and its effect on the direct surrounding area, this includes:

- A major emphasis on the importance of education and learning, enhancement of educational attainment, and promotion of a positive learning culture;
- Developing an integrated transport strategy to improve access to jobs – the City Centre, the Airport, the Hospital, the business parks and the Town Centre;

Most employment in the Wythenshawe area is focussed around the Airport, (the public sector with a major health element) and retail (SRF, pg.11). The SRF makes numerous references to Wythenshawe Hospital as being a major employment cluster (reiterated in the newly Adopted Manchester Core Strategy) and that this, coupled with planned investment at the Airport is a key driver for future growth in the area.

## Economic Context

Greater Manchester's economy is of huge significance to the future economic growth of the UK, with South Manchester playing a vital role in the next 10 years of economic growth. The EZ boundary captures the emerging market opportunities and development within this area will be key in accelerating the growth of South Manchester.

Greater Manchester is the UK's second largest economy, worth £46bn in 2010, in a conurbation home to 1.3 million jobs. With a resident population of 2.6 million, Manchester has also witnessed a population increase of 4.5% over the last decade. Seven million people live in the 1 hour travel-to-work area making it the largest travel-to-work area outside London. The City supports over 100,000 students in 5 universities and welcomed over 19 million people travelling to or from 190 destinations through Manchester Airport last year.

As an investment location, Manchester performs very strongly. Foreign Direct Investment projects as a proportion of the national total increased from 3.4% in 2006 to 5.9% in 2010, with the city being rated first of 15 UK cities for locating an HQ or back office function in the Cushman and Wakefield UK Cities Monitor.

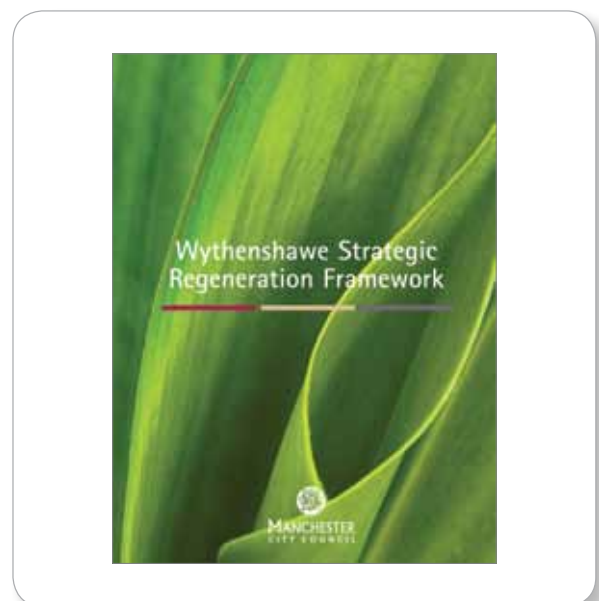
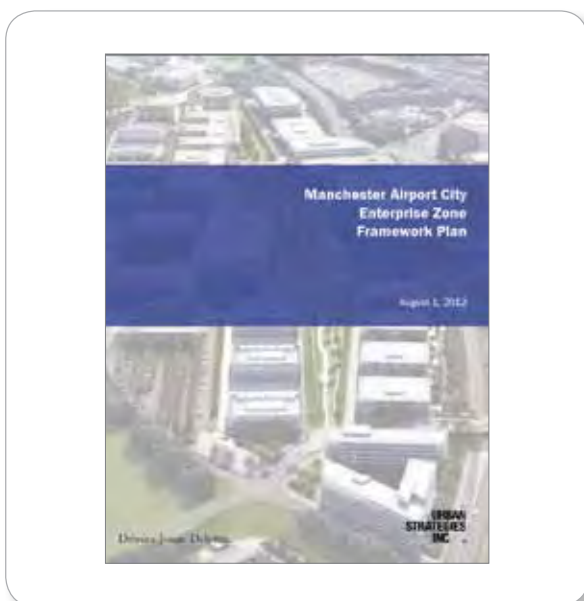
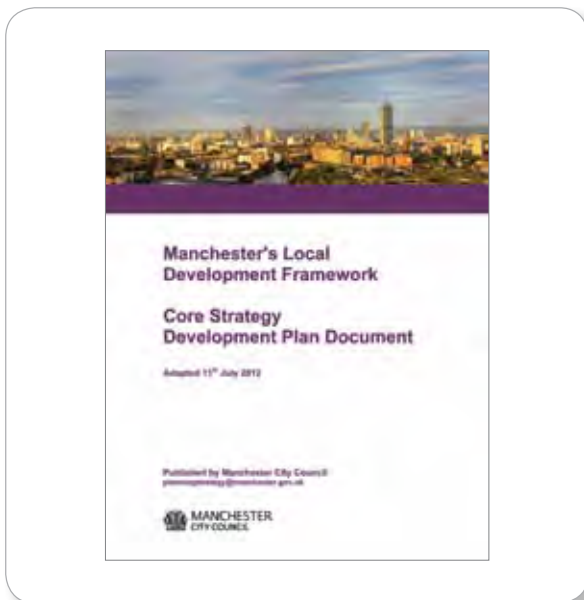
The focus for Greater Manchester's investment opportunities and the subsequent economic growth that will be derived from this is focused largely around South Manchester. This area has the potential to provide high value employment opportunities and wealth creation in many of the key sectors of growth identified within the Greater Manchester Growth Plan.

The background with regard to the MediPark opportunity is laid out in the Greater Manchester Strategy, the Manchester Independent Economic Review and most recently, the Greater Manchester Growth Plan. It is necessary to highlight this context to ensure that the MediPark plays its role in delivering economic growth for Manchester and the City Region.

## Greater Manchester Growth Plan

The Greater Manchester Growth Plan (The Plan) has been prepared by the Greater Manchester Advisory Panel to advise on the appropriate strategies and actions to overcome barriers to economic growth. The panel recommends that Manchester should gain additional powers to enable it to make decisions locally, including decisions relating to the collection and allocation of financial resources.

The Plan recognises the key role that the Metrolink expansion will have in ensuring residents have the opportunity to travel to key employment sites, including Manchester Airport, Manchester Airport City and MediPark.



“Manchester’s size and potential makes it pre-eminent amongst the cities of the North and a natural complement to the Southeastern power house of the UK economy. It has essential economic assets: scale, connectivity and, in the University of Manchester, an international seat of learning of the highest quality. Whilst London will remain the UK’s largest regional economy, the UK is going to need all the areas of growth possible in the coming period....

Manchester does have a route to long-term growth that would make a meaningful difference to the UK as a whole – not least as an exemplar for other agglomerations with effective governance frameworks and the size, potential and single-mindedness to drive forward their own economic growth.”

## Manchester Independent Economic Review and the Greater Manchester Strategy

The Greater Manchester Strategy (GMS) sets out a joint, working strategy between the Greater Manchester Authorities (AGMA). It is the high-level response to the Manchester Independent Economic Review (MIER) which was prepared by a group of independent economists, and identifies priorities that will enable the Manchester City Region to pioneer a new model for sustainable economic growth, based around a more connected, talented and greener City Region where the prosperity secured is enjoyed by many.

MIER highlights that the Manchester City Region has the scale and density to grow rapidly and become an economic powerhouse:

“Manchester’s size and potential makes it pre-eminent amongst the cities of the North and a natural complement to the Southeastern power house of the UK economy. It has essential economic assets: scale, connectivity and, in the University of Manchester, an international seat of learning of the highest quality. Whilst London will remain the UK’s largest regional economy, the UK is going to need all the areas of growth possible in the coming period....

Manchester does have a route to long-term growth that would make a meaningful difference to the UK as a whole – not least as an exemplar for other agglomerations with effective governance frameworks and the size, potential and single-mindedness to drive forward their own economic growth.

Manchester is probably the UK city outside London most likely to be able to increase its long term growth rate, to access international networks and enjoy strong connections to the rest of the world.

However, it is currently punching below its weight given its size. This is an opportunity: the city has the potential to grow faster and to continue to reinvent itself and regain its historical dynamism.”

Accordingly, the Greater Manchester Strategy sets out its vision /objectives for the City Region as:

- A world-class city region at the heart of a thriving North;
- One of Europe’s premier City Regions, at the forefront of the knowledge economy, and with outstanding commercial, cultural and creative activities;
- World-class, successfully competing internationally for investment, jobs and visitors; an area where all people have the opportunity to participate in, and benefit from, the investment in and development of their city;
- An area known for, and distinguished by, the quality of life enjoyed by its residents;
- An area with GVA levels to match those of London and the South East.



## 5 MEDIPARK CONNECTIVITY

Medipark is located within easy reach of Greater Manchester's primary road and motorway network and is also well served by the existing and committed Transport for Greater Manchester (TfGM) public transport routes. Situated 8.0 miles south of Manchester City Centre and 2.0 miles north west of Manchester International Airport, Medipark has an enviable location with the infrastructure it requires to secure private sector investment.

It is hoped that this will be complemented by the arrival of HS2 into the City Centre and with a Station which serves Manchester Airport. Announcements are expected shortly about the routing of HS2 and the business case for the Airport Station. If these support the ambitions of the City Council and the other local authorities and stakeholders affected this will require a review of local transport options to ensure that these investments deliver the maximum benefits to the area. This work would need to be the subject of a separate study which would be undertaken on a collaborative basis with all stakeholders and reported back to the City Council and the other local authorities affected.

### Metrolink

The Metrolink extension to Manchester Airport through Wythenshawe is a significant boost to the whole regeneration and economic development programme for the City, Wythenshawe and the MediPark.

The Metrolink route through Wythenshawe will strategically link together key employment and retail areas such as Altrincham Road retail area, Roundthorn Industrial Estate, UHSM, the proposed new College Campus in Benchill, Wythenshawe Town Centre, Concord & Atlas Business Parks, Ringway Trading Estate, Manchester Business Park area and ultimately Manchester Airport.

Manchester MediPark is at the heart of the Wythenshawe route. Figure 5 illustrates the proposed route of the Metrolink extension, showing the close proximity of Wythenshawe Town Centre, Manchester Airport City and other surrounding developments that will be coming forward in the next 10 years.

The new Metrolink line will provide a fast, frequent, efficient and environmentally-friendly form of public transport for communities along the route who are not currently served by either tram or train. It will also improve access to recreational facilities and employment opportunities at Manchester Airport, Mersey Valley

(including Sale Water Park) and leisure and retail opportunities in Wythenshawe and surrounding areas. The line will also provide access to rail services from Manchester Airport as well as providing improved links with bus services through the new interchange at Wythenshawe Town Centre.

The new line will have 15 new stops at Barlow Moor Road, Sale Water Park, Northern Moor, Wythenshawe Park, Moor Road, Baguley, Roundthorn, Martinscroft, Benchill, Crossacres, Wythenshawe Town Centre, Robinswood Road, Peel Hall, Shadowmoss and Manchester Airport. The line is due to open in 2016 and will provide a tram every 12 minutes between Manchester Airport and Manchester City Centre.

In regard to heavy rail connectivity, there is a longer term opportunity to build a new rail station at Baguley immediately to the north of the site.

### Highways

Primary access to the site from the Strategic Highway Network is taken from the A560 Altrincham Road to the north of the site. This road runs in an east-west alignment providing a link between Altrincham to the west and the A5103 Princess Parkway to the east.

Southmoor Road forms a signal controlled junction with Altrincham Road and runs in a southbound direction through the Roundthorn Industrial Estate before providing access to the site.

Hollyhedge Road runs in an eastbound direction from the site and provides access from the wider Wythenshawe area to the east of the M56.

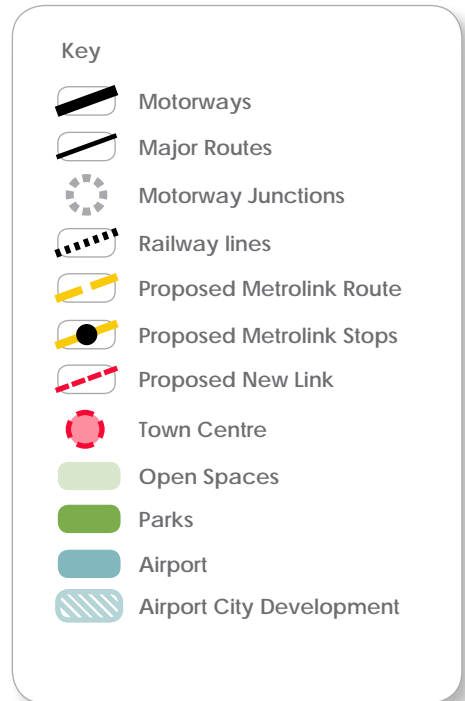
There are further access routes through the surrounding residential areas surrounding the site although these are generally lower class residential access roads with limited capacity.

In terms of wider highways access, indirect access is achievable via Junction 4 of the M56 approximately 2km to the southeast of the site although movements are restricted to/from the motorway to northbound on-slip and southbound off-slip roads.

The various connections surrounding MediPark are illustrated in the following image.



Figure 8: MediPark Connectivity



## Walking Routes

UHSM and the adjacent MediPark site is surrounded by Roundthorn Industrial Estate to the North and residential areas to the South and East. This presents an opportunity to capture an employee catchment within walking distance of the site. The areas contained within this catchment and are illustrated within the following figure.

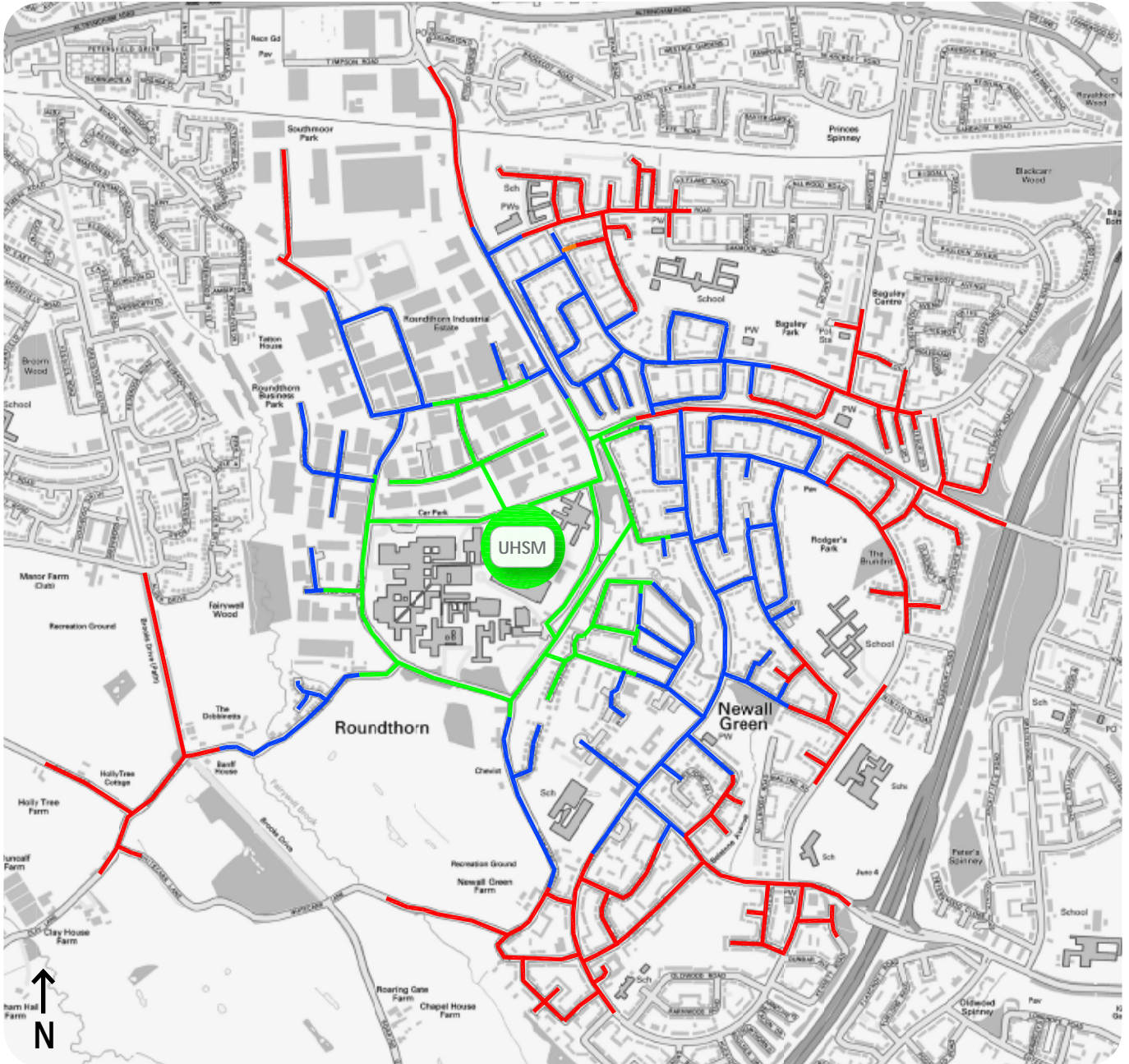
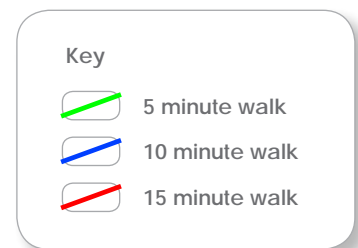


Figure 9: Walking Catchment for MediPark



## Bus Network

UHSM site and the adjacent MediPark is currently well served by a number of high frequency bus services operating across South Manchester.

At present, 9 separate bus services serve the site providing access to multiple destinations including Altrincham, Timperley, Sale, Levenshulme, Didsbury, Cheadle, Edgeley and Stockport.

These are summarised in the table below and illustrated in Figure 8.

Service	Route	Frequency (mins)	
		Mon – Sat	Sun
11	Altrincham – Timperley – UHSM – Wythenshawe – Stockport	15	20
19	Altrincham – Sale – UHSM – Manchester Airport	15	30
104	Manchester – Northenden – Wythenshawe – UHSM	-	60
109	Manchester – Northenden – UHSM	30	60
177	Gatley – UHSM – Altrincham	-	2/days
178	Reddish – Levenshulme – Benchill – UHSM – Timperley Grange	60	60
179	Stockport – Burnage – Baguley – UHSM	60	2/days
194	Longsight – Didsbury – Baguley – UHSM	Peak Only	-
368	Stockport – Cheadle Hulme – Wythenshawe – UHSM	30	-

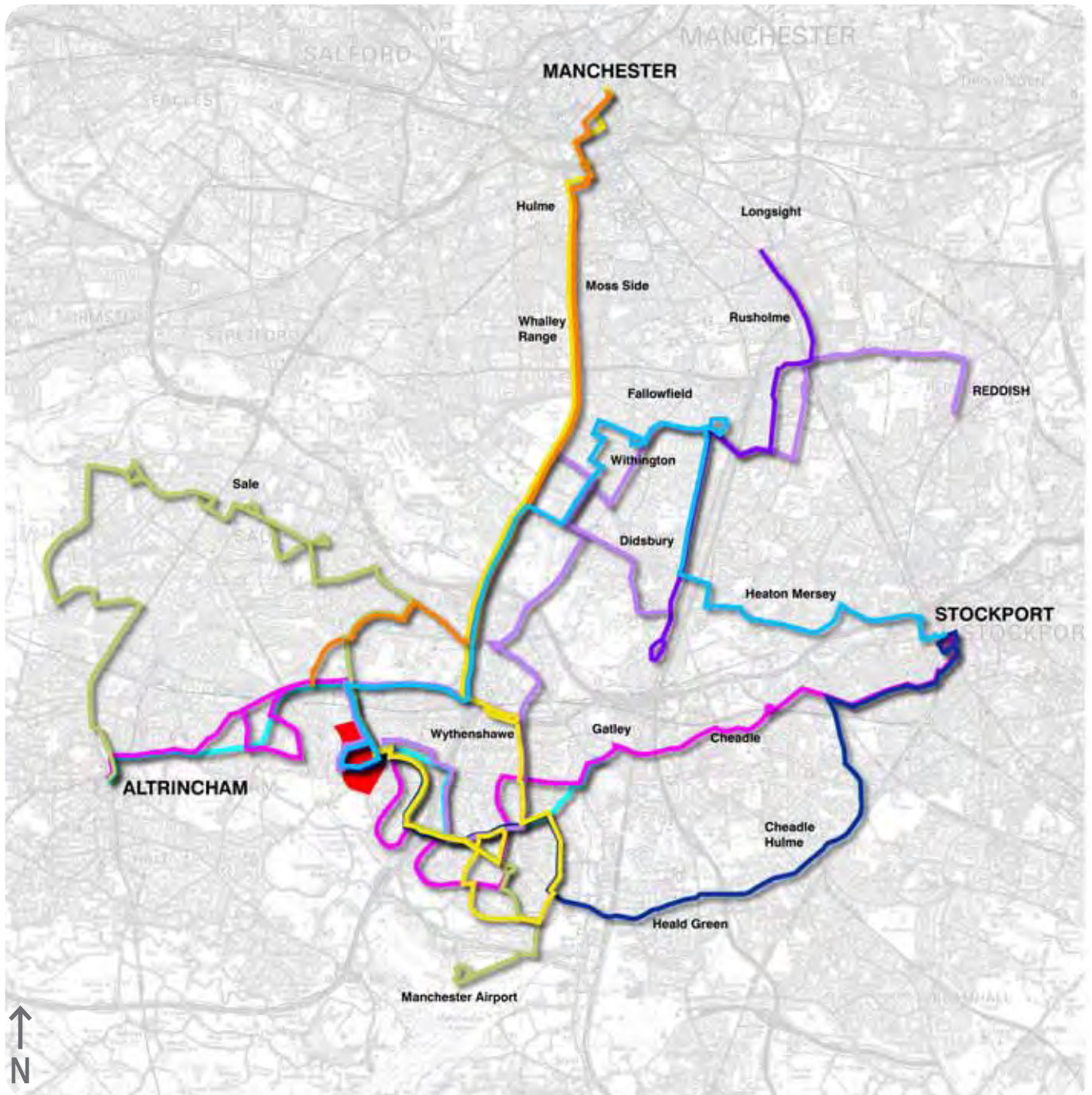



Figure 10: Bus Network Surrounding MediPark

<b>Key</b>	
	Service 11: Altrincham to Stockport
	Service 19: Altrincham to Manchester Airport
	Service 104: Manchester to Hospital
	Service 109: Manchester to Hospital
	Service 177: Gatley to Altrincham
	Service 178: Reddish to Timperley
	Service 179: Stockport to Hospital
	Service 194: Longsight to Hospital
	Service 368: Stockport to Hospital
	MediPark

## 6 DEVELOPMENT PRINCIPLES

A detailed study of the UHSM campus and surrounding environs has been carried out to understand the existing green infrastructure, movement, land use and planning designations. The data collected from this work has helped to inform the key design drivers for the emerging masterplan. The following headings are represented in the following sequence of annotated plans.

- Existing Green Infrastructure
- Existing Movement Network
- Existing Land Uses
- Local Planning Designations

## Existing Green Infrastructure

The hospital site and adjoining Roundthorn Industrial Estate have limited inherent green infrastructure but the adjacent and wider local area provides a rich tapestry of public open space and mature landscape. Wythenshawe Park to the north is a short walk or cycle from the hospital and offers 109 hectares of historic parkland dating back to 1830. An area of open domestic pasture extends to the south within a patchwork of hedgerows and occasional mature trees. A long avenue of mature lime trees breaks the distant view and defines the historic Brooks Drive, now a poorly maintained footpath. An area of pasture then further extends from Brooks Drive to the outer reaches of Hale Barns.

Fairywell Wood can be found immediately to the west of Roundthorn Industrial Estate and offers some valuable existing mature woodland that is both visually and physically connected to the site. Some existing woodland can be found to the southern end of the hospital site that contains a number of significant individual mature trees worthy of recognition.

A linear green corridor along Southmoor Road provides opportunity for informal recreation and visual amenity between the site and the residential areas to the east although a proportion of this is likely to be taken up by the Metrolink extension.

Other locally accessible public open spaces include Rogers Park, Baguley Park and Painswick Park which whilst not visually connected to the site, are all within a short walk or cycle.



Figure 11: Existing Green Infrastructure

## Existing Movement Networks

The majority of people using the existing Hospital facility and associated medical research and related businesses travel by car, taxi or bus. The primary vehicular access from the wider strategic highway network is via Southmoor Road but vehicular access is also provided from the west via Dobbinetts Lane and Whitecar Lane although these are of limited width and capacity. Wythenshawe Town Centre and Manchester Airport can be accessed via Hollyhedge Road to the east.

Car parking is situated around the periphery of the main hospital campus accessed off Hospital Road and Floats Road. There appears to be little extra capacity for staff / consultant parking with cars filling all the available spaces provided, including the large area of temporary surface parking to the south. There is provision for Hospital visitor parking in pay and display car parking accessed off Hospital Road.

Existing public transport provision to the Hospital is well served but will be given a significant boost with the opening of the Metrolink extension to Manchester Airport, which provides for two new stops along Southmoor Road, both of which will be within 400m of the main Hospital entrance.

Cycle routes and activity to the Hospital and Roundthorn Industrial Estate appear to be limited with few road markings and no dedicated cycle routes. There is generally a good provision for pedestrians with wide footpaths along the primary and secondary routes from the north although limited active frontage through the industrial estate may deter users.

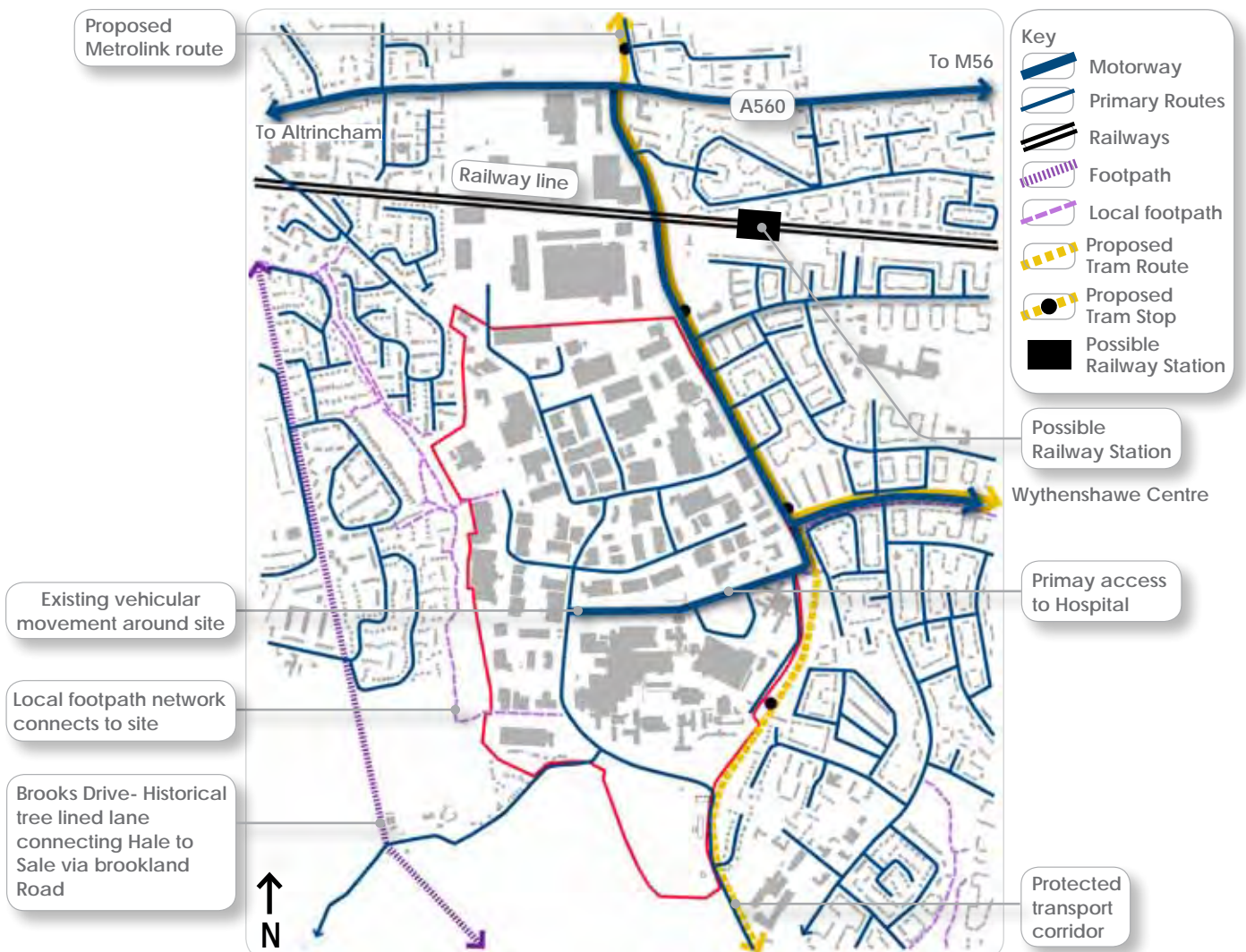


Figure 12: Existing Movement Networks



## Existing Land Uses

The Hospital campus and Roundthorn Industrial Estate are situated between medium to high density residential areas to the east and west, large out of town retail units to the north along the A560 and open green space to the south. There are a number of primary and secondary schools set within the residential areas and a generous provision of public open space as described previously.

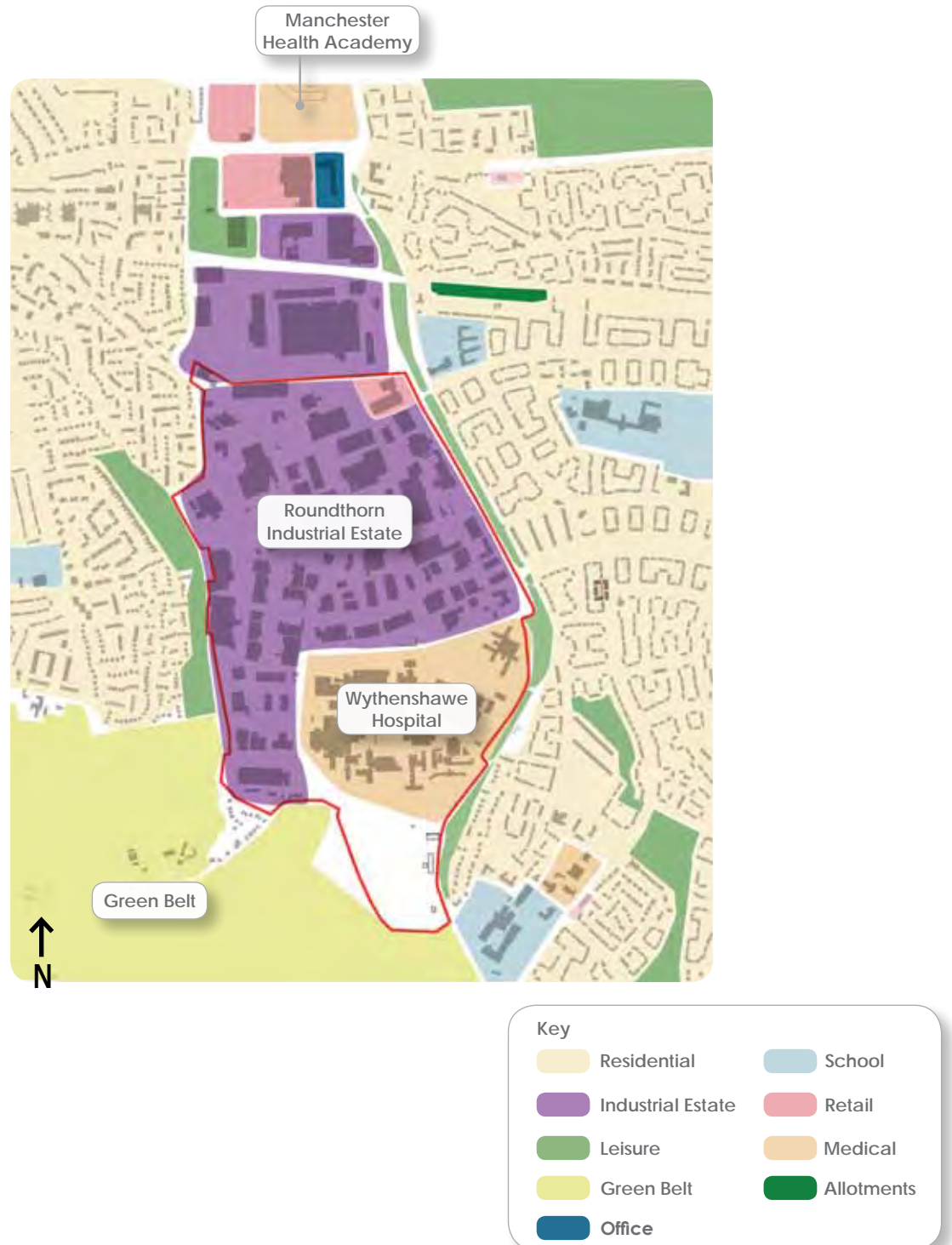


Figure 13: Existing Land Uses

## Land Ownership

A land ownership plan is provided overleaf which demonstrates the land in the freehold ownership of South Manchester University Hospital. Their ownership surrounds the hospital and includes the area of land currently used for carparking to the south of the hospital.

The area of land to the north of the hospital is in the freehold ownership of Manchester City Council. Within this freehold ownership, there are a number of different lease arrangements for the buildings which combine to form Roundthorn Industrial Estate.

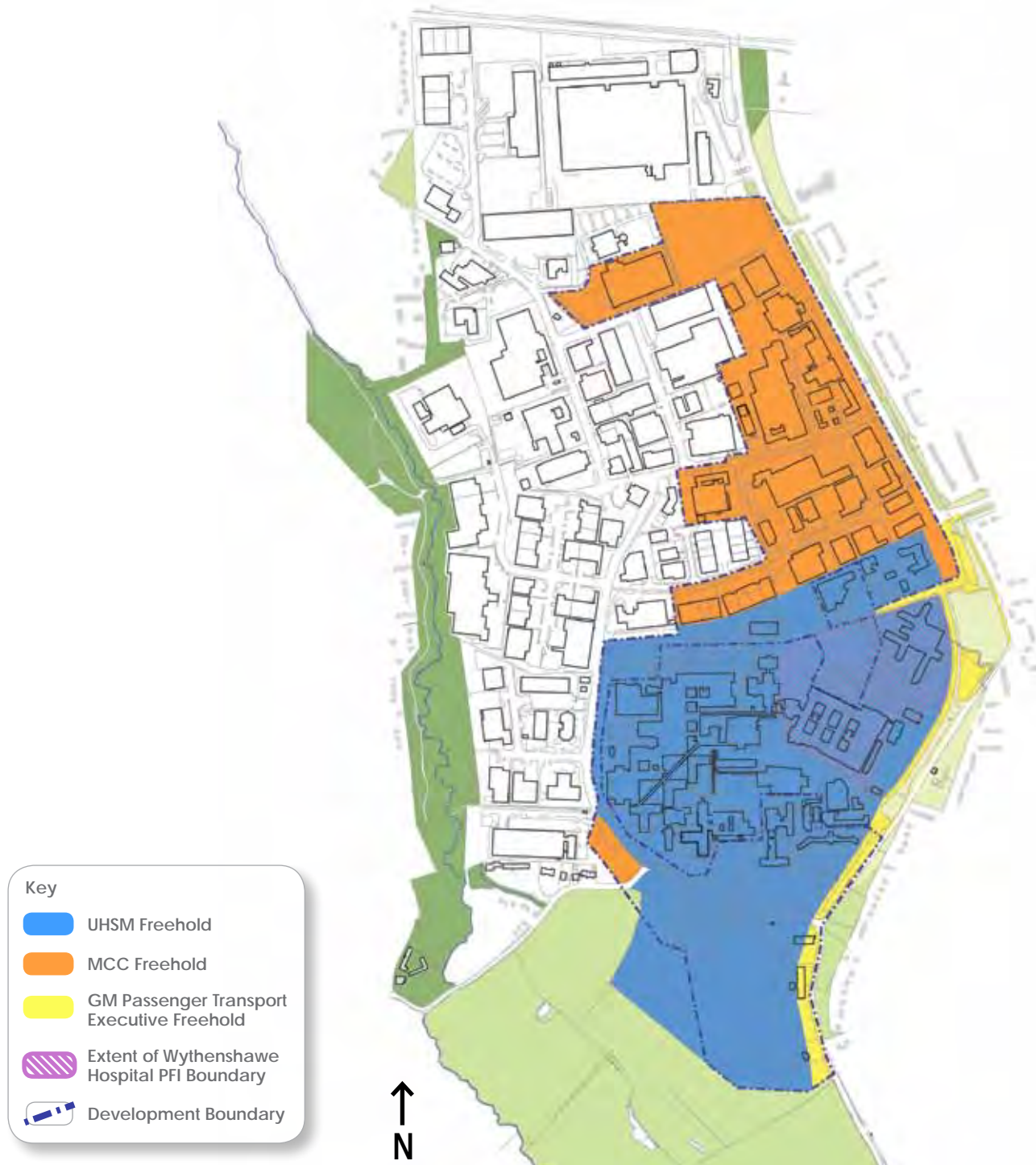


Figure 14: Land Ownership

## 7 SUSTAINABILITY

The MediPark vision has been developed with a sustainable approach at its heart. University Hospital South Manchester (UHSM) has already staked the claim as Britain's Greenest Hospital, and this stance together with the hospital's existing Environmental Agenda should be nurtured and developed throughout MediPark.

Sustainability interfaces with economics through the social and ecological consequences of economic activity. It is paramount to the success of a long-term sustainable development for us to learn from the past and utilise the information available to us currently. Historically, there has been a close correlation between economic growth and environmental degradation; in elemental terms as communities grow, so the environment declines.

Through compliance with Manchester's Local Development Framework – Core Strategy Development Plan Document (July 2012) and best practice in relation to Sustainability, MediPark will provide an exemplar project.

Sustainability is the long-term maintenance of responsibility, which has environmental, economic, and social dimensions, and encompasses the concept of stewardship and the responsible management of resource use.

Principles which should be considered for MediPark include the following:

### Environmental

- The reduction of CO2 and carbon footprints in relation to development, building life cycle;
- Consumption and subsequent re-cycling;
- Introduction of renewable energy sources;
- Consideration towards the natural environment, ecology and bio-diversity; embracing and improving through best practice; and
- Modes of transport, movement and accessibility, car sharing and cycle schemes.

### Physical

- Best practice and innovation in building and place making design and specification;
- Mass, form and orientation;
- Ethical sourcing of materials: empowering consumers to make ethically informed consumption choices; and
- Construction methods: durability, flexibility and adaptability – extending useful life cycles.

### Economic

- Diversity in offer of development (creation of localised supply chains);
- Training/education and job creation;
- Advancement and aspiration;
- Improvement in quality of life;
- Building communities;
- Community stewardship;
- Opportunities to interact on different levels;
- Social relationships; and
- Sense of place and community.

As stated previously, the wider context of Wythenshawe and the surrounding environs, offers significant employment opportunity with close proximity to MediPark. The following section showing design evolution demonstrates how sustainable connectivity to MediPark can be achieved, and suggests how this can be further improved with the introduction of the Metrolink.

In addition, the development of MediPark will benefit the economy by locating an increase in human capital in one relatively small geographic area where ideas can be generated.

## 8 DESIGN EVOLUTION

Having established a detailed knowledge of the site in its existing physical state we are able to explore the opportunities for design evolution through a series of key stakeholder workshops. The following diagrams and associated text sets out a narrative and vision that will inform the long term potential for the site.

- Vehicular Movement
- Pedestrian Movement
- Green Links
- Legibility

### Vehicular Movement

Reducing the number and frequency of non-essential vehicles using Hospital Road as a cut through between Floats Road from Southmoor Road is a key consideration to achieve an enhanced corridor / gateway into the primary hospital facilities. There is an opportunity to divert traffic movements off Southmoor Road into Ledson Road with a potential future connection from Tilson Road that will allow for a more even and efficient distribution of vehicles to existing and proposed car parking. Hospital Road can continue to serve the primary A & E access and public transport drop off but has the potential to be re-designed as a shared surface allowing for greater pedestrian permeability and an enhanced user experience.

A potential extension to Floats Road to the south of the hospital will allow for improved access to the existing car parking and create opportunity to serve future development before connecting back into Clay Lane. An extension of this route to the M56 / Manchester Airport junction offers clear advantages for optimum connectivity in the future.



Figure 15: Vehicular Movement

### Pedestrian Movement

The existing character and street typology leading to the Hospital does little to encourage pedestrian permeability. Existing footpath routes / pavements are typically roadside with little active frontages. Existing connections to the adjacent residential areas are poorly defined and underused. The new Metrolink stops will bring increased pedestrian movement and any new development footprints will encourage more direct and legible routes to the hospital with the potential for retail and leisure offers to activate these routes and take advantage of the footfall.

Further enhancements to the wider footpath network and connections to and from adjacent residential areas will help to bring about a change in perceptions and encourage use.



Figure 16: Pedestrian Movement

## Green Links

There is an opportunity to create a number of green links through the site providing both visual and physical landscape corridors that connect to the adjacent green spaces. These corridors not only have the potential to bring about a change in the character of the site but also create opportunity for wildlife and bio-diversity.



Figure 17: Green Links

## Legibility

A number of Key Spaces, Gateways, Landmark Buildings and Green Corridors have been identified to correspond with the proposed improvements to the sites transport and pedestrian infrastructure. Active frontages, shared surfaces and green infrastructure will help to further define the legibility, orientation and safety for all users.

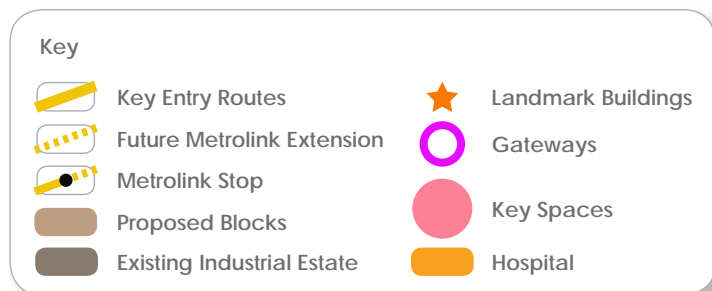


Figure 18: Legibility



## Building Orientation

The suggested layout and orientation of the buildings along the identified streets and corridors will encourage maximum activation at street level and provide safe legible and direct routes between key nodes and gateways. Where the proposed buildings are sited adjacent to open green space they have been orientated to capture and draw views from the wider landscape setting.



Figure 19: Building Orientation

## The Masterplan

The design evolution, site analysis and demand analysis has led to the development of a masterplan.



Figure 20: Masterplan

Key

-  In Hospital
  - Training and conferencing facility
  - Catheter Laboratory
  - Pathology Laboratory
  - Cardiac Imaging Centre
  - Pain clinic
  - Diabetes clinic
  - Hypnotherapy
  - Rheumatology
  - Clinical trials facilities
  - Private patient unit
  - **Regulatory offices**
  
-  Linked to Hospital
  - Zone 1 Wellbeing
    - Private hospital
    - Patient Hotel
    - Key worker accommodation
    - Leisure/rehabilitation centre
  - Zone 2 The Hub
    - Multi storey car park
    - Retail, leisure & ancillary
    - Transport hub
  - Zone 3 Support (decant buildings)
    - Estates
    - IT
    - Finance
    - Back Office**
  - Zone 4 Life Sciences
    - Translational medicine
    - Manufacture
    - Research and Development
  
-  Wider Medipark
  - Commercial
  - **Offices**
  - High-tech manufacturing

## 9 ECONOMIC AND COMMUNITY IMPACT

### Economic Impacts

Despite challenging economic conditions, the Manchester City Region continues to be a key driver of the regional and national economies. Its strengths include a large and highly skilled workforce, an exceptional higher education offer, excellent infrastructure and a track record in public/private partnerships attracting new investment.

The health sector plays a central role in the Manchester economy and is at the heart of the Greater Manchester Growth Plan. Employment has grown by 13% between 2001 and 2011, and the health sector is the second largest employer in the city region, employing over 150,000 people. More than half of the £3.2bn that the NHS spends on goods and services annually in the North West is derived from Greater Manchester hospitals and PCTs providing an indication of the scale of the sector. More locally, there is already a concentration of expertise and employment in health related research, learning and testing at UHSM which employs 5,900 UHSM Staff and treats 500,000 patients annually.

The positive factors of the City Region's economy and its existing strengths in the health sector mean that the MediPark's location will be attractive to growing businesses in the life sciences sector. A project of this nature, with its focus on high value job creation and research and development in the private sector means that it can deliver significant economic impacts and play an important role in the recovery and growth of the City Region from 2015.

The project will complement not only the wider Airport City project but also the growth of the regional centre and developments along the South Manchester corridor. The delivery of MediPark will add 50,000 sq m to the City Region's offer, which primarily comprises high quality medical floorspace. Delivered as part of the Airport City Enterprise Zone, it will help to transform Wythenshawe into one of the City Region's top employment locations for private sector jobs and GVA creation.

It is anticipated that the scheme will accommodate up to 2,770 fte jobs through a mix of high tech and office based employment, as well as a number of supporting service sector roles. This involves just over 1,000 fte jobs by year five, and 2,770 fte within the twelve year delivery programme. The development will generate in the region of £190m GVA over its lifetime (including £79m by year five). This will provide a further significant boost for the health sector within the City Region, leading to its continued growth, diversity and productivity as well

as new business collaborations and development of commercial opportunities. The jobs accommodated at MediPark are anticipated to involve 2,029 office based jobs, 676 high tech jobs and 64 jobs as part of the community hub.

The jobs will be created by a variety of different businesses, including:

- Major anchor tenant(s) and global health sector companies'
- The R&D and clinical trialling functions of large commercial life science companies;
- Small to medium sized (SME) companies including those developed in conjunction with local universities and hospitals;
- Digital healthcare and private healthcare companies;
- Light industrial, manufacturing businesses which serve the sector; and
- Supporting uses and ancillary facilities such as cafes, convenience foodstores, cleaners, pharmacies, and a variety of community facilities.

The development proposals are based around providing incentives, collaborative opportunities, a high quality environment and easy access to national and international markets. These factors will combined to attract new, mobile private sector investment into the area from major international companies, as well as growing the local SME base in the health technology sector. Consequently, a large proportion of the jobs which will be accommodated at MediPark will be additional to the City Region economy and would not be realised without this proposition.

The delivery of these economic impacts means that MediPark will make a major contribution to achieving a number of the City Region's strategic economic objectives.

## Community Impacts

The project will provide a number of positive benefits for the surrounding resident and business communities within Wythenshawe. Community involvement and opportunity is a key sustainability principle of the SRF for MediPark, and all partners are committed to ensuring that the impacts and opportunities presented by the scheme are maximised for the benefit of local residents. This will be achieved by raising awareness amongst the local community and increasing their chances of accessing the employment and training opportunities created.

Wythenshawe remains one of the UK's most deprived areas with approximately 3,000 residents on Job Seekers Allowance and many parts of the local area within the 5% most deprived areas nationally. Despite this, there has been significant regeneration progress over the past decade guided by the Wythenshawe Regeneration Framework, Town Centre Masterplan and plans for other areas such as the Roundthorn Industrial Estate and West Wythenshawe. It is also an area of opportunity with key assets including the UK's largest Regional Airport, UHSM and proximity to the UK motorway network.

The scheme has the potential to deliver a wide range of local benefits. Firstly, it provides a major opportunity to reduce worklessness in the local area. The hospital is already a major local employer in the area. Many of the 2,770 jobs accommodated at MediPark will be taken by local people. The opportunities available will be wide ranging, from higher level opportunities working for life science businesses to a large and consistent supply of new entry level opportunities both full and part time in areas such as catering and cleaning. There will be a large number of vacancies each year through replacement demand as people move on, providing regular opportunities for local students and school leavers.

A project of this scale and value will also provide a boost to the local construction industry, as well as delivering supply chain opportunities for local businesses from a range of sectors such as those located at nearby Roundthorn Industrial Estate. This will be achieved through regular business engagement.

The scale and ambition of the MediPark proposals will help to increase the aspirations of many local people, particularly youngsters in the local area. There is a clear link to the local skills agenda, and the scheme will build on the already strong relationship between the area's health sector and with local schools and colleges (e.g. the Manchester Health academy). UHSM regularly engages

with local schools and contributes to Job Search Skills Events for high school students and promote careers available in the health sector. UHSM has been granted Accredited Apprenticeship status and will be looking to expand the number of apprenticeships, including increasing the number of local community members onto its apprenticeship training programme as part of its engagement with the local community.

There is also a wider history of local job matching and bespoke pre-recruitment training programmes in the local area, for instance through the Airport Academy concept and the work of the Wythenshawe Regeneration Team. The delivery of MediPark will build on these principles of local community engagement.

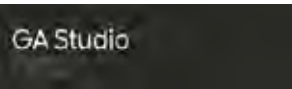
The proposals also include a focus on physical improvements which will benefit local people. This includes greater public transport opportunities, improving circulation and pedestrian links. The development of a new community hub will further increase the quality and range of community facilities in the local area. Finally, the footfall generated through the project will also support the regeneration and revitalisation of Wythenshawe Town Centre, supply chain opportunities, increased footfall and disposable income.

The delivery of these community impacts means that MediPark will make a major contribution to achieving a number of local regeneration objectives such as those set out in the Wythenshawe SRF.

**In summary, MediPark provides a unique opportunity to develop Wythenshawe as a leading area for knowledge transfer, trials and product development in the healthcare sector, providing substantial economic and community benefits.**

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