

**Manchester City Council
Report for Information**

Report to: Economy Scrutiny Committee – 30 September 2015

Subject: City Centre Strategic Plan 2015 – 2018

Report of: The Chief Executive

Summary

This report informs the Committee of the content, and the intention to consult on the draft Strategic Plan for the city centre covering the period 2015 – 2018. This updates the previous plan covering 2009 – 2012.

The purpose of the new plan is to set out progress; to identify the key drivers that will influence growth and development over the next few years; and to explain the proposed direction of travel.

Recommendations

The Committee is invited to note and comment on the report.

Wards Affected: City Centre

Community Strategy Spine	Summary of the contribution to the strategy
Performance of the economy of the region and sub region	The City Centre Strategic Plan describes the approach being taken to further grow and develop the city centre, as a key economic hub of the city region and the North West. It outlines the strategy for both supporting established areas of the city centre and developing new mixed use neighbourhoods which will stimulate employment growth and enable the city centre to respond to, and benefit from, the increasing demand for commercial, retail, residential and leisure space.

Reaching full potential in education and employment	The redevelopment outlined within the Strategic Plan will facilitate the creation of a number of new jobs in a range of employment sectors, and at a range of different levels. The framework provided by the Manchester Work and Skills Strategy 2015-20 and the Greater Manchester Devolution Agreement will provide the means for meeting the growth needs of city centre businesses, and help to enable residents to obtain the skills and attributes needed to access the jobs created.
Neighbourhoods of Choice	The Strategic Plan demonstrates the approach being taken to both manage and support established city centre neighbourhoods in addition to the development of new desirable neighbourhoods in which to live, work and visit.
Environmental and Climate Change Impacts	The Strategic Plan outlines the position and importance of the environmental component of the city centre, aligned to Manchester's Green and Blue strategy, which will adapt the city to climate change, and enhance biodiversity. New city centre developments all place significant importance on the inclusion of new public realm space, supporting and creating desirable places for people to live and visit. In addition to supporting the development of the new public realm the Strategic Plan also outlines the way in which we are improving pedestrian links to maximise existing public realm spaces across the city centre.

Full details are in the body of the report, along with any implications for:

- Equal Opportunities Policy
- Risk Management
- Legal Considerations

Financial Consequences – Revenue

None

Financial Consequences – Capital

None

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Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting.

1. City Centre Strategic Plan 2009 - 2012

Available in Room 303, Town Hall

1.0 Introduction

- 1.1 The attached document at appendix 1 is the refreshed Strategic Plan for the city centre covering the period 2015 – 2018. This updates the previous plan covering 2009 – 2012.
- 1.2 The purpose of the new plan is to provide an update on progress since 2012; to identify the key drivers that will influence growth and development over the next few years; and to set out our planned direction of travel.

2.0 Background

- 2.1 Manchester has a clear vision for the future of the city. The vision is of Manchester as a world class city as competitive as the best international cities. A city:
 - That stands out as enterprising, creative and industrious;
 - With highly skilled and motivated people;
 - With residents living in successful neighbourhoods whose prosperity is environmentally sustainable; and
 - Where all our residents can meet their full potential, are valued and secure.
- 2.2 The Strategic Plan provides a view of both the current position and future development opportunities that will ensure the realisation of the vision for the city. The document provides an introductory perspective around the developing trends and demographics of the city centre, and expands to incorporate both the wider regional and national context of Manchester city centre in its position as the economic hub of Greater Manchester and the wider region.

3.0 Outline of the City Centre Strategic Plan 2015-18

Context and Vision

- 3.1 The recent growth of the city centre – in economic, population and geographic terms – provides the overall context for the updated Strategic Plan for 2015-18. The Plan also sets out the current strategic context, in terms of the Northern Powerhouse, the Greater Manchester Strategy, and the Manchester Community Strategy, which will soon be replaced by the Manchester Strategy. All of these plans aim to strengthen the contribution of the city and the region to the economy of the UK, by increasing economic growth aligned with public service reform. The updated Strategic Plan for 2015-18 looks to take this ambition to the next level.
- 3.2 The vision set out within the previous Strategic Plan remains the same, that is, for the city centre to be a place:
 - to invest

- to work
- to live
- to shop
- people can get to and get around within
- that brings people together
- to enjoy.

Progress and Current Position

3.3 The Strategic Plan highlights some of the key achievements made since 2009, including the completion of the Cooperative's landmark head office and new public square at NOMA; refurbishment of the Civic Quarter including a greatly enhanced St Peter's Square and Central Library; and delivery of the first phase of First Street. It sets out the current position of the city centre, including the following:

- The population of the city centre has trebled in the last decade, now standing at almost 25,000, with this figure increasing to almost 50,000 when the edge of city centre areas are taken into account.
- More than 140,000 people work in Manchester city centre, with increases in employment in key sectors including business, financial and professional services, cultural and creative industries and retail, and how this is driving growth in both basic and higher skilled jobs.
- Manchester is one of the most popular places in the country for international visitors, behind only London and Edinburgh. Hotel occupancy in the city centre continues to grow (with an annual occupancy rate of 77% during 2013), with a significant growth in hotel beds planned to accommodate this.
- Retail and leisure development as a key component of our visitor destination, and a strong employment sector.

Priority Areas

3.4 The Strategic Plan goes on to outline the position and priorities for each of the city centre neighbourhoods, and the key infrastructure investments which are critical to the success of the city centre; taking place as a key priority which underpins the geographically based developments.

The neighbourhoods are:

- NOMA
- St Johns (former ITV site)
- Spinningfields
- First Street
- The Corridor Manchester
- Aytoun Campus
- Central Business District
- Piccadilly
- Mayfield
- Medieval Quarter

- Great Jackson Street
- Salford Central and Greengate
- Water Street
- Irwell River Park
- Retail Core
- Castlefield
- Northern Quarter
- Chinatown
- The Village

Key Infrastructure Investments:

- Transport
- Digital development
- Waterways

- 3.5 The strategy, approach and priorities for each of the areas will be very different, with some subject to significant planned transformation, such as NOMA, St Johns, First Street and Piccadilly, while others being a case of oversight and management, small scale improvement, and stimulation of investment, such as the retail core, Castlefield and the Northern Quarter.
- 3.6 The Plan also looks at predicted future trends and needs in areas such as retail, commercial space, leisure and the night time economy, and car parking. It considers how local residents can be equipped with the qualifications and skills needed to access the employment opportunities being created through the developments and investment outlined, through the mechanisms provided by the Manchester Work and Skills Strategy 2015-20 and the Greater Manchester Devolution Agreement.

4. Conclusions

- 4.1 The Strategic Plan documents the achievements made within the city centre since 2012, across a range of areas including infrastructure development, residential growth, culture, leisure and commercial investment. The document outlines the achievements and objectives for the city centre within the context of the Greater Manchester Strategy, Manchester Community Strategy and Northern Powerhouse. Over recent years, the city centre boundary has expanded to meet the rising demand for commercial, leisure and retail space, in addition to an increase in the numbers of people seeking to live in or adjacent to, the city centre.
- 4.2 The Strategic Plan includes key facts and intelligence data for the city centre in a number of areas including demographics, the visitor economy, retail performance and employment statistics.
- 4.3 It is proposed that the draft Strategic Plan attached at appendix 1 is issued for public consultation. Following this, a final version of the Plan, which responds to the outcome of the consultation exercise, will be presented to the Executive for further consideration.

5 Contributing to the Community Strategy

(a) Performance of the economy of the region and sub region

- 5.1 The city centre is a main driver of economic growth for the sub region and the region. The city centre has continued to grow in recent years, both economically and demographically, with significant future growth predicted. The boundaries of the city centre have continued to expand with new development, providing stronger connections to new vibrant neighbourhoods, including NOMA to the north, First Street to the south and Ancoats and New Islington to the east. The boundary of the city centre has been reviewed and revised to take account of these changes, and embrace those localities that have evolved and display all the functional characteristics of the city centre, in terms of growth and regeneration.
- 5.2 The City Centre Strategic Plan describes the approach being delivered to further grow and develop the city centre, in order to drive the growth of the city region and the North West. It outlines the strategy for both supporting established areas of the city centre and developing new mixed use neighbourhoods which will stimulate employment growth and enable the city centre to respond to, and benefit from, the increasing demand for commercial, retail, residential and leisure space.

(b) Reaching full potential in education and employment

- 5.3 Over 140,000 people are currently employed within the city centre, a number which is projected to rise consistently within the next 5 years. Increasing numbers of national and international organisations are continuing to locate within the city centre, alongside increasing levels of new business start ups. The redevelopment outlined within the Strategic Plan will facilitate the creation of a number of new jobs in a range of employment sectors and at a range of different levels. The framework provided by the Manchester Work and Skills Strategy 2015-20 and the Greater Manchester Devolution Agreement will provide the means for meeting the growth needs of city centre businesses, and help to enable residents to obtain the skills they need to access the jobs created.
- 5.4 The city centre is also home to world class higher educational institutions. The Strategic Plan guides the approach being taken to ensure education and employment thrives within the city. Continuing to attract organisations alongside new business start-ups to the city centre will require additional commercial and flexible work space that reflects the needs of potential occupants. This business growth will ensure the retention of talent developed at the city's educational facilities through the provision of increased employment opportunities and greater residential choices. The transport investment taking place in the city centre will provide better connections for local residents to access the employment and educational opportunities on offer.

(c) Neighbourhoods of Choice

- 5.5 The city centre is a vibrant mix of established and emerging neighbourhoods. The Strategic Plan demonstrates the approach being taken to both manage and support established city centre neighbourhoods, while working collaboratively on the development of new desirable neighbourhoods to live, work and visit, with a balance of residential, employment, leisure and retail amenities. The Plan also outlines the transport and environmental infrastructure investment taking place

6.0 Key Policies and Considerations

(a) Equal Opportunities

- 6.1 A key aim of the Strategic Plan is to ensure that local people can access and benefit from the employment opportunities and facilities being created. In addition, there is a commitment to ensure that design standards throughout the new developments will comply with the City's space standards requirements.

7.0 Recommendations

- 7.1 Recommendations appear at the front of the report.

STRATEGIC PLAN FOR MANCHESTER CITY CENTRE: 2015-18

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Foreword

Manchester city centre has changed dramatically over the past 15 years, and is now one of the most dynamic centres in Europe. Significant private and public sector investment has led to a more vibrant and diverse city scape, including modern iconic buildings such as the Civil Justice Centre and Beetham Tower, as well as new high quality public areas. It has also meant the opening up of new areas to residential and leisure activity, with an increasingly busy and animated atmosphere throughout the daytime and evening.

New business sectors have established themselves in the city, driven by the expansion of existing firms and the relocation of new companies. Financial and professional services, media and creative, life sciences and leisure, advanced manufacturing, tourism and the services sector, in particular have grown, and continue to grow.

Today, Manchester city centre is a destination for many things – for learning, for work, for living, for cultural experiences, for shopping and for relaxation.

The five years since the last City Centre Strategic Plan has seen further transformational growth – both in its economy and population. A renewed confidence in the commercial and residential market has allowed both the continuation of existing developments and the emergence of significant new development, with the boundaries of the city centre expanding to incorporate new areas for people to live and work in.

Manchester city centre continues to play a vital part in the growth of the economy of the city as a whole and of Greater Manchester. This is becoming increasingly important as devolution arrangements develop to allow more and more decisions to be made at the city region level. We continue to work hard to ensure that the benefits secured by investment in the city centre are enjoyed by the communities of Manchester and Greater Manchester, through aligning this with wider skills and accessibility strategies.

Significant further growth is expected over the next few years in the economy and population of the city centre, bringing both opportunities and also challenges, including ensuring appropriate infrastructure and adequate residential accommodation is available to support this growth.

This revised City Centre Strategic Plan seeks to:

- Demonstrate what has been achieved since the last Strategic Plan was published in 2009;
- Update the vision for the city centre within current economic and strategic context; and
- Outline the direction of travel and key priorities over the next few years in each of the city centre neighbourhoods.
- Describe the partnerships in place to deliver those priorities.

The Strategic Plan will shape the activity that will ensure that the city centre continues to consolidate its role as a major economic and cultural asset for Greater Manchester and the whole of the North or England.

Sir Richard Leese
Leader
Manchester City Council

July 2015

DRAFT

1. Introduction and Context

The economic geography of Manchester city centre is rapidly evolving, with exponential growth and significant development and over recent years. As both the economy and population of Manchester have grown, large scale mixed-use developments incorporating commercial, residential and leisure uses are driving change at its boundaries - including Ancoats and New Islington to the east, the Green Quarter and NOMA to the north, and to the south west at Castlefield and St. Georges. These locations have increasingly become attractive places to live for people working and spending their leisure time within the city centre.

This growth has contributed additional residential accommodation, commercial property and leisure destinations – and these locations (together with others including the Irk Valley and New Cross) have a clear potential to contribute to the city centre offer: their relationship with, and proximity to, existing concentrations of activity demands their inclusion within the city centre boundary. The plans to expand the city centre boundary to incorporate fringe neighbourhoods and developments will increase a population that has already trebled over the last decade and subsequently further enhance the city centre economy.

How we plan for growth will be just as important as growth itself. There will, for example, be greater energy needs and higher demands for public services. Our operational management structures will need to be flexible enough to respond to these and control possible unintended consequences such as anti-social behaviour.

Since the previous strategic plan was published in 2009, there has been a significant change in the policy and funding context in which the city operates, as a result of the change of government and the strengthening of the Greater Manchester City Region structures. One of the key outcomes of this has been the move towards greater local governance and control, established first through the innovative City Deal with government, and now through the recently announced Devolution Agreement for Greater Manchester.

National Context

Northern Powerhouse

There is a growing recognition, at both a local and national level, that by joining together the cities of the North of England, an increasingly powerful economic area can be created that can help to re-balance and grow the national economy providing the ability to compete internationally. Manchester is at the forefront of this movement, and the city centre, as a key driver of the economies of both Greater Manchester and the North West, will be a crucial component in this connected Northern Powerhouse.

In 2014, Greater Manchester local authorities agreed a devolution settlement that will assist in delivering economic growth across the region whilst improving the quality of life for residents. This agreement builds on the work of the Greater

Manchester Combined Authority pulling together all Greater Manchester's local authorities.

The arrangement is the first of its kind in the U.K. outside of London, and will play a pivotal role in helping to build a Northern economic powerhouse. The Greater Manchester devolution agreement will introduce a new elected Mayor who will represent the combined authorities and hold responsibilities for new delegated powers and resources.

Local authorities in Greater Manchester will retain all of their existing powers. However, the devolution agreement will provide additional tools to develop high quality places for people to live, work and do business. The alignment of our local authorities powers will support the delivery of the vision and objectives outlined in the Greater Manchester and Manchester strategies respectively.

The reforms in scope through devolution include housing, planning and transport alongside improving resident skills, health and social care, and reducing levels of unemployment across the region.

Improved transport connectivity between the cities of the North is one of the major elements of building a stronger northern economic base. Manchester, along with the other northern cities, has developed the One North proposal to transform the transport connectivity and capacity, improving journey times, reliability and quality. These improvements to the transport infrastructure will widen and strengthen the north's labour markets and improve business efficiency. A series of investments are being developed across highways, rail, logistics, ports and airports to deliver this transformational change. The re-regulation of buses is also of major significance, as it will enable bus services to support improved access to the city centre (and other destinations) playing a principal role in the future success of the city centre as a driver of employment growth.

Further priorities for delivering the Northern Powerhouse include strengthening science and knowledge, and culture. Manchester is receiving investment to provide two centres of excellence in these areas – a new theatre and performance space at St John's (The Factory Manchester), and the £235 million Sir Henry Royce Institute for advanced materials research and innovation at the University of Manchester, which will link with satellite centres in other core cities in the north of the country.

Greater Manchester Context

Greater Manchester Strategy

The Manchester Strategy (see below) is aligned with, and strongly supports, the over-arching Greater Manchester Strategy. The Greater Manchester Strategy provides both a vision for the city and the elements that will be addressed in delivering this vision.

The vision put forward in the Greater Manchester Strategy, is that by 2020 the Manchester City Region will have pioneered a new model for sustainable economic growth based around a more connected, talented and greener city region where all our residents are able to contribute to and benefit from sustained prosperity.

The GM Strategy recognises that Manchester is one of the UK's most successful cities and presents the ambition to become one of the most successful cities in the world. The priorities included in the refreshed Greater Manchester Strategy set out a programme of bold, collective action to help shape that success. The priorities are also grouped around the key themes of Growth and Business and Reform.

A key challenge for the future success of the Strategy will be defining how growth proposals emerge over the wider city region, around both residential and commercial development, so they both augment the existing growth trajectory of the city centre, but also build on the key assets and attributes of individual localities.

Growth and Business

In order to achieve the ambitious growth targets aligned with the city centre, creating the conditions for optimum and sustainable growth is essential. The GM Strategy seeks to diversify the economic base of the city centre in response to changing market conditions whilst developing a market facing investment strategy. The global distinctiveness of Manchester seeks continued strengthening to cement its position as a desirable location to invest, live and visit, which in turn will assist in both attracting and retaining talent.

Reform

Development will need to take a focused approach if we are to achieve our ambitions of reducing worklessness levels.

An employer-led skills system aligned to broadening the opportunities available to young people will drive our objective of reducing youth unemployment. Improving skills alongside initiatives around digital and transport connectivity, will encourage self reliance and a reduction in demand for public services.

The “Manchester family” of organisations, including Manchester Solutions, New Economy, MIDAS and Marketing Manchester have been reviewed and restructured, to ensure that the work of these organisations supports the delivery of the priorities outlined within the Greater Manchester strategy. A new group structure incorporating all of these organisations has been established - the Manchester Growth Company – operating as a public / private partnership between the Combined Authority and Greater Manchester Local Enterprise Partnership.

Local Context

Manchester Strategy (formerly Manchester Community Strategy)

The Manchester Strategy defines the vision for the city, as being a world class city as competitive as the best international cities:

- That stands out as enterprising, creative and industrious.
- With highly skilled and motivated people.
- Living in successful neighbourhoods whose prosperity is environmentally sustainable.
- Where all our residents can meet their full potential, are valued and secure.

The new Manchester Strategy, currently being developed, builds on the existing priorities of Growth, People and Place which will replace the Community Strategy, and will be subject to extensive consultation, beginning in July 2015.

The Manchester Strategy is closely aligned with the regeneration prospectus for Salford: **Salford 2025 – A Modern Global City**, reflecting the joint approach between the cities to develop and grow the regional centre. The vision for Salford 2025 is to:

- Transform the skyline of the city through outstanding new infrastructure.
- Strengthen and diversify Salford's economic base.
- Shape places and deliver outstanding environmental quality.
- Fully connect people to the growth opportunities.

The Community Strategy groups the strategic direction of the city centre into three key themes; growth, people and reform and place.

Growth

Manchester city centre is well placed to continue to attract and grow new jobs. A focus will be placed on improving productivity by increasing our skills base and the number of people accessing local jobs.

The economic aspect of delivering continued growth will involve further development of new and existing partnerships with private, charity and voluntary sectors. Extending the boundaries of the city centre, as described earlier, will provide additional capacity for growth. Due to the contribution of the retail sector to the city centre economy, supporting the retail sector is paramount to achieving sustained economic growth.

Residential development will also play a pivotal role in achieving growth. Creating a city centre environment and infrastructure that encourages people to live and work here is fundamental. We are developing a range of tools to support a higher quality residential offer, including enhanced space standards, and active interventions around site assembly, as well as clear regeneration frameworks, particularly at some of the edge of centre locations, for example,

New Cross. Progress is being made too, through the development of an edge of city centre strategy, which is driving a new market rental offer to meet the needs of a younger, more diverse population. Central to this is the *Manchester Life* proposition (see below) which is utilising private investment aligned to central funding incentives to create a high quality yet affordable offer. Homes for sale is also an important component of our wider residential strategy. This will involve kick-starting development resurgence in response to improving economic market conditions, in addition to identifying developments and partnerships to deliver schemes that respond to intelligence gathered about our current and projected city centre population.

In addition to residential and economic growth, a sustained commitment to attracting and hosting global and major events will continue. These will include Manchester International Festival and a variety of sporting events. Alongside this, continued improvements and promotion of the city's cultural and leisure offer will strengthen the sustained growth of the region.

People and Reform

Services will be shaped to ensure that they are providing the best opportunities for local residents, in particular supporting access to the labour market and encouraging local communities to drive more of their own initiatives. In a city centre context, this involves encouraging business partners to engage in local labour initiatives providing employment and training opportunities to local residents; providing the infrastructure to attract and retain a skilled workforce; and making the city centre an inclusive place for all people to access.

Place

Investment in 'place' will continue to create and maintain a city centre that is attractive for people to live, visit, invest and work in. This will ensure that we have the right local environment and infrastructure, both physical and digital, for all users of the city.

Creating an attractive and safe environment through effective development of green spaces, street management and security will be essential. Collaboration with Greater Manchester Police and other agencies will continue to reduce the impact of crime and homelessness.

City Centre

The city centre performs a number of key functions for the city and the Greater Manchester City Region:

1) As a driver of economic growth and a major employment centre: The city centre accounts for over 40% of Manchester's employment base, and is a significant driver of regional economic growth, hosting more than 10% of all jobs in Greater Manchester. Over 140,000 people are employed in the city centre (as at 2013). It supports an exceptionally large proportion of the city's

knowledge based and higher skilled jobs; over 90% of employment in sectors such as professional and financial services; and over 60% of all business service and technical jobs. Cultural, creative and digital industries are another key sector, with the digital and creative economy a key driver of the City's economic performance. The research, science and bio-science sector and their relationship with our Universities is becoming increasingly important to the growth objectives of the city centre and Greater Manchester as a whole, along with public administration, leisure, tourism and the service sector. The city centre is set to experience further significant employment growth in the coming years, with another 15,000 jobs predicted by 2024. The highest levels of growth are expected to be in the higher skilled, knowledge based, science and digital jobs, helping to continue to grow the competitive advantage of the city and the city region.

2) As an increasingly popular residential centre:

The growth in the number of people living in the city centre over the last 20 years (from a few thousand in the late 1990's to nearly 25,000 today) is a major success story. It is testament to the work that has been done both in growing employment and leisure opportunities, and in making the city centre an attractive, vibrant and welcoming environment. As highlighted in the next section, particularly strong population growth has been a feature since the 2001 Census, along with a trend towards a younger population. The growth is directly related to the city's economic growth, which has been driven by the considerable expansion of the key sectors outlined above. Demand for city centre living that embraces different tenure types, is rapidly increasing and is a key attractor for those who seek different lifestyle choices. The residential trajectory is expected to continue as a result of the continued increase in employment predicted in the city centre. Further work needs to be done to ensure that the city centre provides the right quality and mix of accommodation, and a continuous pipeline long into the future for our growing population. Therefore, the Council is proposing to introduce appropriate space standard and amenity measures through the development of a Residential Design Guide for Manchester.

3) As a major visitor destination:

Manchester city centre is also increasingly becoming a destination of choice for visitors, both from abroad and from other parts of the UK. The city centre is particularly rich in cultural assets, with facilities ranging from the biggest indoor arena in Europe to our renowned Bridgewater Hall, the home of our world famous Halle Orchestra. 2015 is a particularly exciting year for culture, with the re-opening of the Whitworth Art Gallery following a £15m transformation, and the launch of HOME, the new independent cinema and theatre centre at First Street. The diverse range of increasingly popular events, including the unique Manchester International Festival, and the huge variety of retail and leisure assets including restaurants, cafes, clubs and bars, all add to the dynamism and sense of place of the city centre, as well as supporting our strong employment base. The demand for hotel stays in the city centre continues to grow, as does the number, range and quality of the hotel offer. Working with Marketing Manchester, we are continuing to improve the visitor experience,

including the connections between places, how people navigate and utilise wayfinding tools, using both traditional and new digital methods. This is especially important given the major transport and development schemes taking place over the next few years. We will also need to address place priorities around events, including joining-up funding sources and widening sponsorship opportunities to strengthen our event offer.

4) As a place to relax and spend time:

A high quality public realm is essential to the character and appeal of the city centre for residents, visitors and workers alike. There are a number of attractive green spaces within the city centre itself such as Sackville Park, St John's Gardens, Parsonage Gardens, Piccadilly and Cathedral Gardens. These are being added to through a number of new public spaces planned at First Street, NOMA and St John's. As well as providing informal places for people to relax and get together, the city centre's squares and public spaces can be used to stage events and activities, appealing to a wide range of people. The network of canals and waterways add further to the local environment and opportunities for leisure activities. Continuing to improve the range and quality of the public realm, through a variety of activities, is a key priority. In addition to the space available in the city centre, a number of larger suburban parks are easily accessible by public transport, such as Heaton Park, Hulme Park and Platt Fields.

The **2009-12 Strategic Plan** described how the city centre will drive Manchester's ambition, reflected in the Manchester Strategy, to be in the highest rank of cities globally.

It set out a vision for the city centre as a place:

- to invest
- to work
- to live
- to shop
- people can get to and get around within
- that brings people together
- to enjoy

This Strategic Plan looks to take this ambition to the next level, within the new strategic context provided by the trends highlighted above, and the revised Manchester Strategy, the Greater Manchester Strategy, and the emerging strategy to create a Northern economic powerhouse to help re-balance the economic dominance of London. All of these plans aim to strengthen the contribution of the city and the region to the economy of the UK, by increasing both economic growth and self reliance and further detail is given below.

2. Achievements Since 2012

The population of the city centre has increased further from 19,000 in 2009 to nearly 25,000 at the time of the 2011 census. This figure increases to nearly 50,000 if the wider edge of the city centre areas are taken into account (e.g. Ancoats and New Islington). These areas are increasingly becoming popular places to live, boosting the popularity and use of the city centre further.

Despite the economic climate of this period, we have achieved much success in continuing to attract investment and drive development within the city centre over the last three years. Notable successes within this period include:

- Committed and planned investments of around £1.5Bn over the next 5 years by the key institutions in the Corridor Manchester; University of Manchester, Manchester Metropolitan University and the Central Manchester University Hospitals NHS Foundation Trust (CMFT) which will be augmented by new research, incubation and science park facilities. Funding has been approved for the £60million Graphene Engineering Innovation Centre (GEIC), and in December 2014 funding was announced for a new £235M Sir Henry Royce Advanced Materials Institute, based at The University of Manchester, with satellite centres across the region.
- The continued consolidation of Spinningfields, the city's premier business destination, which is entering its final phases of development. Over £1Bn of private investment has created a destination of choice for new businesses, and has secured over 15,000 jobs in the area.
- Completion of the Cooperative's landmark new head office and new Public Square as part of the NOMA redevelopment in the northern part of the city centre.
- The opening of the National Football Museum in Manchester in July 2012 following a £8.5m refurbishment, attracting 350,000 visitors in less than a year and welcoming its 1 millionth visitor in October 2014.
- Delivery of a greatly enhanced St. Peter's Square through the completion of No. 1 St Peter's Square, which is home to KPMG's new Manchester head quarters, refurbishment of the Town Hall Extension and Central Library, and provision of the first phase of new public realm, including the relocation of the cenotaph.
- Completion of the first phase of the First Street redevelopment, including HOME - a new major cultural facility for Manchester, along with a 4* hotel, retail facilities, car parking and significant new public realm.

- Increased success of the Manchester International Festival. The 2013 Festival had an economic impact of £38m (up from £35.7m generated from the first Festival in 2009) and was attended by almost 250,000 people, an increase from 224,000 in 2009).
- Work commencing on a £44m refurbishment of Victoria Station and the Northern Hub rail scheme. This development will improve linkages and connectivity to a number of Northern locations.
- The completion of major refurbishment and expansion of the historic Chetham's School of Music.
- Around £1.5Bn of investment to support the expansion of Metrolink. This will include a second city crossing for the city centre to improve linkages to the rest of the conurbation.
- Significant investment in the hotel and leisure offer. Over the last 5 years, 21 hotels have been developed with a further 21 planned over the coming years.

With the UK economy having now surpassed its pre-recession peak, the level of business activity and strength of the private sector put the city in a strong position to drive on amidst the ongoing economic recovery. Based on results from the 2014 edition of the Greater Manchester Forecasting Model (GMFM), well over 100,000 jobs are estimated to be created in Greater Manchester over the next decade. The city centre will be an important driver of this growth, in sectors such as financial & professional services, retail and the cultural & creative industries.

3. City Centre Snapshot and Key Facts

Population

- The population of the city centre has trebled in the last decade and now stands at almost 25,000. When the population of those living on the city centre fringe is incorporated this figure increases to almost 50,000 residents. The population will continue to rise in the future as further planned residential developments expand the city living concept.
- A key features of this growth has been a significant rise in the proportion of the population aged between 25 and 29 (which has grown by 50% across the city). This is attributable to increased levels of graduate retention; facilitated through economic growth and the increased attraction of graduate employers.

- The Greater Manchester Forecasting Model (GMFM) predicts that the population for the city will reach 555,000 by 2020, illustrating the continued citywide growth.

Residential

- To meet this growing demand there will need to be not just an increase in homes for rent, but a focus on stimulating residential for sale where the market is still frail, and supporting measures where the market is showing signs of recovery. Locations that could drive this include St John's and Bootle Street (see below).

Economy and Employment

More than 140,000 people work in the city centre, and this figure could rise to more than 150,000 over the next ten years. The city centre accounts for more than 10% of all jobs in the whole of Greater Manchester and there are a number of sectors driving its economy: Between 2010 and 2013, employment in financial and professional services increased by 45%, in property by 43%, in retail by 25% and in media, creative and the arts by 10%.

- **Business, financial & professional services:** Over 70,000 people work in the sector in the city centre, accounting for more than one quarter of employment in the entire sector in Greater Manchester (267,000 people).
- **Cultural & creative:** Almost 25,000 people are working in the cultural and creative industries in the city centre, representing more than 15% of employment in the sector in Greater Manchester.
- **Retail:** More than 15,000 people are employed in retail in the city centre, which is 12% of the sector's total workforce in Greater Manchester (see *Retail Core* section below)

Inward Investment

The city centre is an important inward investment location for companies investing in Greater Manchester. Since 2009, there have been nearly 50 inward investments, creating almost 3,500 new jobs and generating more than £125 million per year in additional economic output.

Commercial Development

Manchester continues to perform very well in comparison to other regional centres with regards to the take up of office space, with the city centre now having the largest office market outside London. Average prime office rents remain higher than regional and national averages, surpassing the £30 per sq ft mark in September 2013 and reaching a record headline rent for Manchester of

£32 per sq ft in 2014. Ongoing positive momentum suggests a forecast of further rent rises to £33.50 by 2018.

The impact of this is a greater demand for not just grade A space, but a range of commercial space that is flexible and attractive to the price sensitive occupier. As strategic regeneration frameworks are developed for key areas of the city centre, space for accommodation which is flexible and able to meet the needs of the market and key growth sectors will be central to those plans. The subsequent master plans and regeneration frameworks for NOMA, First Street, St. John's and the Aytoun Campus are all reflective of the increasing demand for high quality, flexible commercial space, as well as providing a range of residential property options.

Visitor numbers and attractions

Manchester as a whole is one of the most popular places in the country for visitors from abroad. In 2013 it attracted almost 1 million overseas visitors, behind only the capital cities of London and Edinburgh. Manchester's inbound overseas market has increased by more than 400,000 since 2000.

Key attractions in the city centre for both domestic and international visitors include:

- Museum of Science & Industry – 677,000 visitors
- Manchester Art Gallery – 387,000 visitors
- National Football Museum – Over 1 million visitors since opening mid 2012
- HOME – the recently opened arts venue, which is already proving a success

Retail

Retail spend in Manchester hit £910m in the last year, making it the top shopping destination outside London. Figures released by The Heart of Manchester BID (Business Improvement District – see below) in its annual report, published just a month after its second anniversary on April 1, show the city's retail sector's strong performance.

Leisure

The Greater Manchester Leisure survey 2014 showed an average spend of £35 per day visitor and £79 per staying visitor within the city centre. This rises to £97

for those staying in paid-for accommodation, and falls to £39 for those staying with friends and family.

For every staying visitor in paid-for accommodation, an average spend of £58.16 is spent across businesses in the city centre including: restaurants; bars; attractions; retailers; entertainment venues and public transport.

From visitors to Manchester city centre, 28% reported they were visiting the shops, 18% eating out and 7% spending in bars and clubs. In comparison Greater Manchester had 23% of visitors reporting that they were visiting the shops, 17% eating out and 5% reported that they would spend time in bars and clubs. This not only shows the important role that shops, restaurants and cafes play towards the visitor experience, but also the income generated to such businesses from the visitor market.

Major events within the City Centre include:

- **Manchester International Festival:** Attendance at the 2013 MIF was almost 250,000, attracting both a national and International audience. The festival generated around £38 million for the Greater Manchester economy.
- **Christmas Markets:** As the first UK city to host continental style festive markets in 1999, Manchester's Christmas markets have continued to grow year upon year. With more stalls than any other UK festive market, the city's Christmas Markets are also amongst the most popular in the U.K, attracting more than 1 million visitors a year both nationally and internationally. This contributes an estimated £90million to the local economy annually.
- **Pride:** Attracting more than 40,000 visitors a year and generating around £20 million for the local economy.
- **Political party conferences:** The Conservative party conference held in 2013, generated an estimated £27 million for the local economy and attracted around 13,000 delegates to the city.

Hotels

There has been huge investment in the hotel offer in recent years. Since 2010 a total of 21 hotels and serviced apartments have opened within the city centre. A further 9 hotel / serviced apartments are currently in the early stages of development and another 12 hotel / serviced apartments are in the development pipeline for the next few years.

With annual occupancy rates at 77% during 2013, hotel occupancy within the city centre has reached its highest rate. These elevated occupancy levels have been achieved within the context of a 58% increase in the total number of hotel rooms within the city centre over the last 8 years. Over this period the number of rooms rose from 4,990 in 2006 to 7,860 in 2013.

In order to meet the continued growth in demand for accommodation as a result of Greater Manchester's buoyant visitor economy, a further 2,224 rooms have been planned. This demonstrates an increase of 27% on current levels with a high proportion of these will be delivered by 2016.

From the new additions to hotel accommodation a majority have confirmed quality accreditations. Almost 60% of the new rooms are 4/5 star rated, demonstrating quality provision.

5. Resident Access to Jobs and Skills Development

Strong economic growth in the city centre has been the major driver of employment in the conurbation and increasing numbers of Manchester residents are moving into employment. The unemployment rate has fallen significantly since 2013, and over the past decade there has been a large decrease in the number of Manchester residents of working age who are claiming an out of work benefit. Working age residents who are attracted to the city are more likely to be in work; educational attainment in the city has improved; and longer term residents who have previously been out of work have found employment.

Many of the growth sectors that pre-dominate in the city centre will create employment opportunities that require skills and qualification at level 3 and above. It is important that the City's young people and working age adults are equipped with the qualifications and skills to succeed in this labour market. However, there will also be entry level employment opportunities for Manchester residents in, for example, a strong and growing service sector. One of the challenges for the city is to ensure that this work is sustainable and pays a sufficient wage to enable residents to live full and healthy lives. Working with employers and building on the success of current Reform programmes, there is a need to ensure that those furthest from the labour market are supported to access those opportunities.

Growth Sectors

Manchester's top four forecast growth sectors over the next ten years in terms of jobs and GVA are:

- construction
- business, financial and professional services
- cultural, creative and digital
- research, science and development

All of these four sectors have a strong presence within the city centre and will provide quality career opportunities for Manchester residents. Many of the employers in these sectors have a strong track record of local employment.

Supporting Residents into Work

The Manchester Work and Skills Strategy 2015-20 is the strategic document that sets out the priorities and provides a framework to drive changes within the

work and skills system. The Strategy outlines a new, more demand-led approach to work and skills, which will create a system to meet the growth needs of businesses and enable residents from all backgrounds to obtain the skills and attributes employers require. The Strategy recognises that residents furthest from work and those in low paid employment will be priority groups for public funding. A more demand led skills system with less public funding will put more emphasis on employers investing in the skills of their current and future workforce.

The Greater Manchester Devolution agreement provides opportunities to create an integrated employment and skills system that is much better aligned to the needs of the local economy. The further education adult skills programme will be re-designed by 2017. To support the reform programme, devolution allows the expansion of Working Well from 5,000 to 50,000 Greater Manchester residents, and for the co-commissioning of the Work Programme, both of which will support those furthest from the labour market to gain employment in the city. A range of projects are already being delivered to ensure Manchester residents are supported to find work within city centre employers.

Employer Suite

The Manchester Employer Suite is a free to access facility that matches Manchester residents to employment vacancies in the city centre. Employer facing, the initiative is a partnership between Manchester City Council and Jobcentre Plus. Staff within the Employer Suite have built relationships with key city centre employers, advertise opportunities, identify potential applicants and offer pre-employment support to help reduce the cost and time pressures on employers. In return, it enables Manchester residents to secure a higher proportion of opportunities. Pre-recruitment training is offered to residents who need to top up their skills to compete for the jobs available.

Apprenticeships and Local Labour

The current volume of construction activity in the city centre presents opportunities across a range of construction trades and professions. Employers are being encouraged to employ local people, and the Construction GTA model being managed by the Greater Manchester Chamber of Commerce is coordinating opportunities across the future pipeline of construction projects. Projects which have already delivered significant numbers of apprenticeships and local labour include First Street, the Town Hall Extension and St Peter's Square refurbishment. Future developments at St John's, around Piccadilly Station and at NOMA also have the potential to deliver large numbers of opportunities for residents.

Recent analysis of apprenticeship take-up by Manchester residents during the 2013/14 academic year, revealed that Business Administration is the most popular for 16-24 year olds and the second most popular for 25 years and above. The city centre is likely to account for a considerable proportion of these opportunities. The Health and Social Care sector is the most popular

apprenticeship for 25 years and above and is the second most popular for 16-24 year olds. The Central Manchester University Hospital Foundation Trust (CMUHFT) is one of the major recruiters of apprenticeships in the city. However, there are also apprenticeship opportunities in a range of other sectors which we will actively promote to local residents.

The devolution proposals around skills development will also provide the platform through which a pipeline of quality apprenticeships will be available, and we will work with businesses at the local level to ensure that they actively engage with residents on their uptake.

6. Area Profiles

NOMA

The Cooperative Group, in partnership with the City Council, have begun a significant transformation and redevelopment, on the existing Cooperative estate and the surrounding area, at the northern gateway to the city centre. As a result, a neighbourhood that has been a part of the Manchester city centre landscape for over a hundred years is being rejuvenated making it a desirable place to live, work, create and innovate.

The area is located on the north side of the city centre in close proximity to The Green Quarter residential development and the Northern Quarter. The neighbourhood includes Victoria Station, the Medieval Quarter, the Printworks leisure venue, the Corn Exchange, and proposed developments at New Victoria and the listed City Buildings. The development and integration of the NOMA neighbourhood will improve functionality and linkages amongst these neighbouring city centre areas, as well as better linking the communities of North Manchester to the city centre. It will also help to provide a catalyst that can drive further residential development in the Lower Irk Valley area on the northern fringe of the city centre, leading out to Cheetham Hill and Collyhurst.

NOMA will become a distinct new urban neighbourhood that combines a vibrant mix of commercial activity, residential, recreational amenities and cultural facilities. Weaving the site's history, values and beautiful heritage buildings with new innovative, state-of-the-art new buildings and public realm will create a unique sense of place and character. New companies will be attracted through the creation of a range of offices in both heritage and new buildings and a supportive business "ecosystem". As well as providing high quality business and residential accommodation, the area will offer a distinct experience, based on the exploration of a series of intimate spaces, with a range of independent and high end retail, restaurant and leisure uses.

Delivery of such major regeneration will be completed through a phased approach. Since the previous city centre strategic plan was produced, the construction of One Angel Square has been completed. Located in the heart of the NOMA development, this award winning building is the head office of the Co-operative Group and the base for 3,000 of its employees. The 15 story, 3

sided building has immediately become a unique and unmistakeable piece of architecture on the city centre skyline.

The subsequent developments that will form the collective NOMA neighbourhood will be phased over the next 10 years. The next stage to be delivered, starting in 2015, includes new residential apartments, a 4 star boutique hotel and restaurant and a retail destination, in addition to refurbished office space and public realm. Further living accommodation, leisure, retail and office space will follow these developments, in addition to vehicle parking.

Access and connectivity to the area will be much enhanced with the completion of the Victoria Station improvements, and proposals for the redevelopment of the New Victoria site, which lies adjacent to the station. New Victoria will add to the residential and commercial offer in the northern part of the city centre, and include new public realm and active uses such as restaurants, coffee shops and bars planned for the ground floor areas, making the neighbourhood a prime destination to work, live, visit, shop, eat and be entertained.

Key Priorities

- Completion of the public realm to create a sense of place alongside new pedestrian and cycle routes.
- Delivering the next phases of the redevelopment, including the refurbishment of the existing co-op estate – City Buildings and Hanover - to provide new office, retail, leisure and hotel accommodation in addition to new office buildings adjacent to 1 Angel Square.
- Creation of the first phase of new homes – Angel Gardens – close to 1 Angel Square.
- Attraction of new companies to the area working with MIDAS
- Establishing further temporary uses to animate the area during the development
- Coordination with the redevelopment of New Victoria for commercial and residential development
- Integration with new residential developments proposed on the northern edge of the city centre.

St John's

St John's is situated adjacent to Spinningfields, Castlefield and the River Irwell. With scope for significant regeneration there is an opportunity to develop a neighbourhood that epitomises Manchester's character, culture and heritage. St

John's will be a new unique city centre neighbourhood, a community of creativity, culture and innovation where people can live, work and experience the best of the city.

Located at a key gateway to the city centre and formerly home to Granada TV, St. John's has been a high profile location for media and creative activity for over 50 years. Building on the area's industrial and media heritage, developments will centre on many of the existing historic assets on the site, including the Bonded Warehouse and St John's Gardens.

The development of the area will be achieved through a partnership between the Council and Allied London. The partnership will create a mixed-use city centre neighbourhood for enterprise, art, culture and living. The area is well served by the City's leisure offer, neighbouring the Museum of Science and Industry, the John Rylands library and People's History Museum, the Castlefield arena and Roman Fort, and Deansgate's Great Northern Complex.

St John's will be the catalyst for significant redevelopment of Manchester's cultural infrastructure. The area will be the home of The Factory Manchester, a nationally unique flexible arts space and arena with a seated capacity of 2,200 and overall event capacity of 5,000. The Factory Manchester will be the catalyst for new creative and tech industry activity in the area. St John's will further expand the cultural offer within the city centre, attracting an international visiting audience and diverse cultural partners

The vision for St John's includes:

- Developing The Factory Manchester as a nationally unique arts and culture destination.
- The development of St John's as a major new enterprise, arts and cultural venue within the city, significantly enhancing the attractiveness of the scheme to potential residents and occupiers, creating a distinctive sense of place, and contributing towards the vitality of the area.
- Providing Low-rise "lateral living": with the space and features of a modern townhouse – including a garden – but arranged on a single level
- The vision and framework are based on a two-tier development concept:
 - The Village: A low-rise, intimate, mixed-use "Village" of 5-7 storey building forms, which reinstates the historic tight-street grain of the area. The Village incorporates a layering of uses including workspace, studio space, retail and leisure, together with a roofscape of residential uses and terraced gardens,

providing activity and a 24 hour, 7 days a week, life to the new city centre neighbourhood. The workspace will be aimed at key economic growth sectors, including media and creative industries and TMT. A major cultural facility is identified as being a key part of the profile of development in this location given the way it could anchor the creation of a distinct neighbourhood, generating new activity, increased footfall and extending dwell time; it would significantly enhance the attractiveness of the scheme to occupiers within these growth sectors.

- The Sky: A series of elegant residential towers that “float” over the “Village” and provide views across the city centre. Taller buildings will be located to the west of the site, towards the River Irwell, where it has been established through the adoption of previous Strategic Regeneration Frameworks that there is scope to accommodate buildings of height.

Key Priorities

- Begin the delivery of the 1st phase of the development, comprising of the refurbishment of the historic bonded warehouse, the Manchester Grande ‘event hotel’, phase 1 of the village and the first residential scheme.
- Ensuring linkages to Spinningfields and Castlefield neighbourhoods
- Design and start on site of The Factory Manchester.
- Manage the impact of the Ordsall Chord works

Spinningfields

Tucked between Castlefield and Deansgate, Spinningfields is one of the largest and most successful regeneration projects in the country.

Manchester has the largest and fastest growing professional, commercial and legal centres in the UK, after London, and Spinningfields is the prime location for the growth of this sector. This dynamic new business location combines stunning architecture and high quality urban design to create a mixed use, modern and distinctive quarter of the city centre which is a prime attractor for high calibre organisations that are represented globally.

The area is a world class business quarter in addition to a modern hub of premium retail units, leisure destinations and a luxury residential offer. Spinningfields has attracted international investment, from market leading organisations within the property, retail and professional services industries.

Spinningfields has attracted over £1bn private sector investment and boasts:

- 13 buildings developed in total including eight office buildings delivering 3,500,000 sq ft of Grade A office space.
- 450 residential apartments
- 4 new public squares
- 165 commercial organisations making Spinningfields their home

Spinningfields is home to The Avenue and The Avenue North, Left Bank and The Lawns. The development has become a popular events destination within the city centre. Throughout summer, Spinningfields' 'The Lawns' hosts outdoor cinema Screenfields, while in autumn and winter the area is home to the Buy Art and Great Northern Contemporary Craft fairs, Additional seasonal events such as the Easter duck race and a Christmas ice-rink are complemented by a number of pop up bars and eateries.

A number of high profile financial and professional services companies, including RBS, HSBC and Deloitte are located at Spinningfields. Financial and professional services occupy 70% of the space including: banks, law firms and accountants

Spinningfields is also home to two of the city's key historic buildings: The People's History Museum, on the bank of the Irwell, and the John Rylands Library, a breathtaking red sandstone building on Deansgate.

The Civil Justice Centre, one of only two in the U.K, and part of a wider group of court buildings including the Magistrates Court and Crown Court are located within Spinningfields as is the offices of the Manchester Evening News.

Spinningfields now accounts for more than 35% of the City's prime office space. The area now supports over 15,000 jobs within over 40 commercial organisations, including many key financial and professional organisations. Further development plots in the pipeline provide around 580,000 sq ft of office and retail space. This phase of development will provide a range of flexible commercial solutions for a range of occupiers. On completion of the master plan there will be circa 20,000 people employed in the area.

The Allied London / Manchester City Council joint venture continues to attract and secure new international and domestic investment. Spinningfields encompasses new models of management with the Spinningfields Business Group maintaining the area to ensure it sustainably retains its position as a premier location for new and continued investment.

Key Priorities

- Continued development of the area, generating a truly mixed quarter focussing on ensuring sustainable long-term success.
- Delivery of the final phases of development - The XYZ Building and No 1 Spinningfields Square.

- Ensure successful links with the neighbouring St John's development
- Continuation of events to further animate the area.

First Street

First Street is set to emerge as Manchester's most vibrant new neighbourhood, with a compelling blend of culture, leisure, retail and office space, set within a destination rich in amenities, with excellent connectivity.

The First Street development is located at a prominent gateway position, at the north western end of Corridor Manchester, marking the entrance to the city centre from the airport and the south. It is one of Manchester's most visible, exciting and unique development opportunities and will become a distinctive new neighbourhood within the city. A mixed use neighbourhood will be created on the 20 acre site over the next 10-15 years, including new commercial accommodation targeted at growth markets. First Street is also the location of HOME - a new cultural facility developed alongside retail, hotel and residential accommodation.

The new development will deliver significant economic benefits for Manchester and the city region, providing 242,000 sq m of new commercial space and the potential to accommodate over 11,000 jobs. Conservative estimates suggest that the new cultural facility will attract at least 850,000 visitors a year and visitor spend of at least £21m. A new development framework is currently being prepared to inform the next phases of development.

First Street North – This is the first phase of the First Street development and will create a destination that will attract significant numbers of new visitors, providing the amenities vital to attracting a range of office occupiers.

First Street North will also include the development of a 210 bed, 4* international hotel, a 700 space multi storey car park, high quality serviced residential accommodation, and a range of small scale retailing opportunities, as well as new public spaces, including a new square and linkages to Whitworth St West through the arches. Development of First Street North has now been completed

HOME - HOME, a new purpose-built centre for international contemporary art, theatre, film and books recently opened its doors for the first time in Manchester in May 2015. The collaboration between the previous Library Theatre Company and Cornerhouse will include 500 seat and 150 seat theatres, five cinema screens, a gallery space, digital production and broadcast facilities and a café bar and restaurant , driving significant footfall to the area, and a catalyst to wider development.

First Street Central – will be a new office destination targeted at a range of commercial occupiers, providing the benefits of a central, highly accessible, but competitively-priced city centre location. The new development framework estimates that the area will have the capacity to accommodate upto 2m sq ft of office accommodation.

First Street South – The emerging new development framework identifies the opportunity to create a high quality residential offer that would enhance and reinforce the wider neighbourhood, providing increased footfall and spending power to support leisure and cultural uses in the area.

Creative Ribbon - the wider First Street area provides a number of sites where low cost creative hubs could be developed to further grow the creative business sector, and establish First Street as a new distinctive and vibrant cultural district within the city centre. This builds on the large number of cultural and creative businesses already in the area including the Hotspur Press building, as well as Oxford Road, down Whitworth Street West to Castlefield and Knott Mill, with Home as its centrepiece. This activity is considered to be critical to providing an East-West connection from Oxford Road Station to Knott Mill/Castlefield and fully integrating the neighbourhood into the wider city centre. Hotspur will be a key catalyst to augmenting creative business development in this area.

Key Priorities

- Agreement of a revised development framework for the area.
- Development of First Street South following further design and planning work, to provide a new residential offer for the city centre.
- The retention and long term use of Hotspur Press.
- The early marketing of the Little Peter Street site for residential, with a presumption in favour of housing for sale.
- Investigating the feasibility and appropriate designs for potential creative hubs, within and adjacent to Hotspur Press, and by exploring options for re-using and animating the railway arches along Whitworth Street West to add to the creative offer and vibrancy of the area.
- As well as taking forward the delivery of the different phases of First Street, a key priority for the next few years will centre on the branding, animation and marketing of the area, to start to create a sense of place which can start to establish the area as a place to visit and do business.
- Activities will include, the development of a strategy for animating the new public space around Home, to help drive footfall.
- Development of the first commercial phase, and taking forward a lettings strategy for First Street Central. The first phase of commercial development is expected to take place from mid-2015, following the

creation of crucial facilities at First Street North. A new 235,000 sq foot office building is being planned.

- Work with Network Rail to manage the Northern Hub works at Oxford Road station and minimise the impact on the First Street development.

Corridor Manchester

Corridor Manchester is a unique area of Manchester and the UK. As a hub containing world class higher educational institutions, a leading research and teaching hospital complex, a rich range of cultural facilities all intertwined with the presence of a significant number of additional industries, there is nowhere else within the UK with the same concentration of facilities in one neighbourhood.

Corridor Manchester is economically the most important area within Greater Manchester, with more job creation potential than anywhere else. The area generates £2.8bn, equating to 22.5% of the City's GVA and employs 55,000 people, 18% of Manchester's workforce. It has a diverse range of employment sectors, including health, education, creative industries, communications and financial services. 43% of the activity on Corridor Manchester, is within knowledge intensive sectors.

Subsequently the successful development of Corridor Manchester is fundamental to driving future economic growth and investment in the Manchester city region. The Corridor Partnership consists of Manchester City Council, Manchester Metropolitan University, The University of Manchester, Central Manchester University Hospitals, the NHS Foundation Trust, Bruntwood, ARUP, and Manchester Science Park. The partnership is half way through a 10 Year £3bn development programme, which by 2020 will deliver over 3 million sq ft of commercial, leisure, retail and residential space of the highest quality. It is predicted that by 2020 through this additional investment Corridor Manchester will generate £4.8bn GVA and have a workforce of 77,000.

Corridor Manchester is the country's major centre for the development of applications for the groundbreaking material, Graphene. Discovered at the University of Manchester, Graphene is the thinnest, strongest, most flexible and conductive material in the world. The area is now home to the new National Graphene Institute, located at Manchester University, which will be the world's leading centre of research into Graphene, providing opportunities for researchers and industry to work together on a huge variety of potential applications.

The National Graphene Institute will soon be complimented the £61m Graphene Engineering Innovation Centre (GEIC), located on Sackville Street and scheduled for completion in 2017. Together the two centres will position Manchester and the UK in pole position to take advantage of these opportunities and lead the world in this exciting new technology.

An additional significant catalyst for growth and innovation within the city and the wider Northern Powerhouse will be the Sir Henry Royce Institute for Advance Materials, Research and Innovation. Situated at Manchester University, the institute will become a world leading base in advanced materials science. In addition to the key linkages with the Graphene Engineering Innovation Centre and National Graphene Centre, The Sir Henry Royce institute will be augmented by satellite centres in Leeds, Liverpool and Sheffield. The Royce Institute will aim to drive collaborations between academia and industry, to commercialise the UK's world-leading research in this field and will position the city at the forefront of future scientific innovation. The area has been at the centre of significant redevelopment over recent years, which are beginning to transform the area. These initiatives include:

- The £600m transformation of the Central Manchester University Hospitals NHS Foundation Trust, centred on University Boulevard.
- Schemes have been established to assist local residents to gain the required skills to access newly created jobs.
- The provision of new public realm, funded by European Regional Development Fund (ERDF), creating an environment befitting of the world-class knowledge base. Works have included an improved public square and spaces at All Saints Park and enhanced landscaping at University Place, as well as improvements to key junctions and crossings.
- Work is nearing completion at Citylabs (the Former Royal Eye Hospital site), to develop a biomedical centre of excellence at the heart of Europe's largest clinical and academic campus. Phase 1 of the development, totalling 100,000 square feet, is now complete.
- Manchester Metropolitan University's (MMU) opening of a new Faculty of Business in September 2012 alongside a new landmark School of Art and Design building in April 2013. In addition, an innovatively designed new campus at Birley Fields in Hulme is nearing completion, with new routes to be provided to link the campus to the city centre.
- Corridor Manchester has been established as a "Low Carbon Laboratory", testing projects in a real life city environment.
- The first phase of the University of Manchester's Campus Masterplan, which will create a single campus, involving new teaching and research buildings, student facilities and major improvements to the public realm.
- The Corridor Manchester partnership have progressed a range of initiatives to create the optimum environment for the knowledge economy

to thrive and grow, alongside the local business community, making the most of its proximity to the key knowledge institutions.

- The Corridor Manchester Growth Fund, launched in April 2013 with £2m funding provided through the Government's Regional Growth Fund. The scheme ran until March 2015, providing grant funding to small and medium-sized enterprises to help incentivise them to locate or grow research and development related activities in Corridor Manchester. The Fund supported the creation of at least 100 full time jobs.
- The North Campus, one of a number of transformational strategic development sites, offering the opportunity for significant redevelopment for activities related to the functions of the HEI estate. The site is the former UMIST campus, close to Piccadilly Station (and the proposed new High Speed 2 Station), and where re-development will involve creative uses for important heritage buildings.

Key Priorities

- Delivery of the Sir Henry Royce Institute and Graphene Engineering Innovation Centre, with further exploration to be undertaken around the opportunities presented by both facilities.
- Major public transport investment is planned for Corridor Manchester, in particular the cross city bus package.
- Further exploiting the science and knowledge base of Corridor Manchester to stimulate business growth.
- The Northern Hub rail schemes will ensure that Oxford Road station remains a key transport node and will bring additional routes to the station. An initial public consultation was recently carried out on the Northern Hub proposals at the Station, with a second phase due to be undertaken in Summer 2014.
- Manchester Future City: Corridor Manchester is the main focus for the Manchester Future City demonstrator, providing a series of projects which will lead towards the development of a one mile spine of low carbon mobility, smarter low carbon energy systems, consolidated freight distribution, smart, efficient buildings and promotion of healthier living. This spine will be used to open up opportunities for a range of connected projects that radiate out into the surrounding residential districts and on to the new Airport City Enterprise Zone, and back into the city centre.
- Set in the heart of Corridor Manchester on Oxford Road, the 4 hectare former BBC site is a major strategic development opportunity, and is therefore a regeneration priority for the Partnership. A Strategic Regeneration Framework (SRF) has been developed for the site. The vision for the area is to provide a high quality, vibrant, mixed-use development that will create a new and distinctive neighbourhood taking

advantage of the locations' unique attributes and building on the proposed Northern Hub works. The BBC site is the preferred location for the new Royce Institute.

- Consolidation of University campus': Both the University of Manchester and Manchester Metropolitan University are currently in the process of redeveloping and consolidating their campuses on a smaller number of centralised locations. This will create new high quality learning environments enhancing the student experience. Following this consolidation the priority will be to develop strategies for the sites no longer required. The redevelopment of these sites including the North and Aytoun Campus's will play a pivotal role in the continued growth of the city centre.
- Enhancing the cultural Experience: The Whitworth Art Gallery's transformational £15m development will increase public space by 100%, creating a beautiful and inspiring environment where visitors can enjoy the internationally significant collections and the tranquil setting of Whitworth Park.
- A Master plan has been produced for Manchester Science Park. The framework focuses on the expansion of the park from 250,000 square feet to over 1m square feet within the next 8 years. It also looks to improve connection points, shared spaces and public realm, in order to create the right environment for academics, entrepreneurs and investors to interface.
- Smart City Programme – delivering innovative approaches around linking informatics and technology with practical programmes for health care, planning and delivering public services.

Central Business District

Manchester city centre continues to be a major driver of economic growth in the city region and a key location for domestic and International business investment. The Central Business District (CBD) is home to a wide range of companies of varied sizes, across a range of business sectors and is fundamental to the city remaining a business destination. The CBD provides a pluralist model offering different value propositions for the range of occupiers the city needs to accommodate, and has facilitated growth within the retail, creative and digital sectors and additionally within major growth sectors such as financial and professional services. The supply of available office space has not kept pace with demand, however, and therefore a key task will be to stimulate prudent speculative development in appropriate locations, to maintain a balance between demand and supply over the next few years.

At the heart of the CBD, Manchester's Civic Quarter, based around St Peter's Square, is pivotal to the next phase of growth of the city centre economy. It is one of the most significant areas of open space within the city centre, characterised by one of the finest collections of historic and modern civic, cultural and commercial buildings in the UK. It is also a major gateway and a key arrival point to the city centre and Corridor Manchester specifically.

The redevelopment around St Peter's Square is driven in response to the city centre's shortage of Grade A office space which has constrained levels of growth. The last year has provided indications of increased take up of commercial space, and of developers beginning to respond to the shortage of Grade A space. Addressing this issue will increase the city centre's attractiveness as a business location.

The former Bootle Street Police Station is a major site within the Civic Quarter. Its planned redevelopment provides an opportunity to make an important contribution to supporting the conference quarter, adding to the offer of high quality hotels which are needed if Manchester Central (see below) continues its drive to attract high end conferences and international business associations. In addition, it has the potential to play a key role in linking and integrating Spinningfields with the Civic Quarter, allowing for continuous high quality accommodation and public realm across this stretch of the city centre.

The major transport changes being delivered in the city centre will significantly affect the area over the next few years, with the upgrading of the St Peter's Square Metrolink stop, Second City Crossing and Bus Priority works all underway.

Transformation of the Civic Quarter is well underway with the refurbishment of the Town Hall Complex complete, along with the restoration and extension of Central Library delivered through £177m of public investment. The redevelopment has focused on creating the opportunity for significant additional, high quality commercial floor space to enhance the magnificent location of the city's key heritage assets.

As well as a significantly enhanced public realm, the redesign of St Peter's Square includes the relocation of the Cenotaph to the space opposite the rear of the Town Hall, and relocation of the tram stop and revised traffic arrangements to facilitate Metrolink's second city crossing which will run from the square down Princess Street and Corporation Street to Victoria Station.

Planned commercial developments will help to deliver much needed additional Grade A office space and include:

- The redevelopment of No.1 St Peter's Square is now complete providing 207,000 sq ft, 13 storey grade A office development. A pre-let for 63,000 sq ft was agreed with the accountancy firm KPMG in August 2011, with a

further 10,500 sq ft take up in July 2015. KPMG moved into No.1 St. Peters Square in December 2014.

- Redevelopment at No. 2 St Peter's Square. Located at the Northern end of the square and sitting in the heart of Manchester's civic complex, work has now commenced on the 11 storey redevelopment that will speculatively deliver 18,000 sq m of Grade A Office space, in addition to 510 sq m of retail space with an underground parking facility. The completion date for the redevelopment is summer 2016.
- Other developments, for example, the former Odeon Cinema (Landmark), Peterloo House, London Scottish House, 40 Fountain St, St James House, John Dalton House, Heron House, Lincoln House, Overseas House and Brazenose House will all add to the supply and diversity of the commercial offer in this part of the city centre.
- Manchester Central is another major asset of the Civic Quarter. The facility has established itself as a leading convention complex, recognised as a premier venue for political and other major conferences. There is more potential to be exploited by Manchester Central – there is significant land to the rear which in time can support new commercial space and or a hotel.

Key Priorities

- The last year has provided indications of increased take up of commercial space in the city centre and of developers beginning to respond to the shortage of Grade A space. The new developments within the Civic Quarter, along with developments in neighbouring areas such as Spinningfields, are adding new supply. The major transport changes being delivered in the city centre will affect the area over the next few years, with the upgrading of the St Peter's Square Metrolink stop, Second City Crossing and Bus Priority works all underway.
- Encouraging supply of more Grade A floor space, particularly through supporting the delivery of commercial developments around the Civic Quarter.
- Completion of first phase of St Peter's square public realm and relocation of the Cenotaph.
- Coordination of the major transport works in the area with the commercial and public realm developments taking place.
- Implementing a strategy to continue to attract major conferences to Manchester Central. Investigating/encouraging further development and investment at the centre including the Radisson Blu Hotel's plans for the

Theatre Royale on Peter Street, and the Great Northern complex on Deansgate.

- The redevelopment of the former Bootle Street Police Station.

Piccadilly

The wider Piccadilly area has the potential for unrivalled major transformation over the coming years. The additional investment at Piccadilly Station provided by HS2 and the Northern Hub (see Transport section) represents a unique opportunity to transform and regenerate the eastern gateway to the city centre, defining a new sense of place and providing important connectivity and opportunities to major regeneration areas in the east of the city. Development of the Piccadilly area will improve linkages and connections with the residential neighbourhoods of Ancoats and New Islington. In addition, the TransNorth proposals described earlier will provide further transport capacity and connectivity, to help drive economic growth in Manchester and other Northern cities.

In order to respond to these opportunities, a Strategic Regeneration Framework (SRF) has been developed for the area surrounding Piccadilly Station. The starting point for the SRF is the once-in-a-century opportunity provided by HS2 and the Northern Hub to create a world class transport hub and arrival point into the city, and to transform the eastern side of the city. The size and scale of the area – approximately 140 acres - also means it is one of the largest regeneration opportunities within the city centre, and developing a growth strategy for the station area, that embraces the planned infrastructure developments and a co-ordinated approach to commercial development will be a key priority for 2015/16.

The SRF proposes a number of new neighbourhoods with strong individual identities: These are:

- Piccadilly North – reinstating the historic street pattern.
- East Village – mixed-used development with residential focus around canal basins.
- Piccadilly Central – an area of large office developments around public squares and high-rise residential towers framing a new city park.
- Mayfield – a new mixed-use city quarter on the banks of the remediated river.
- Links to the North Campus (the former UMIST campus off Sackville Street) and Corridor Manchester area.

It also proposes a network of public spaces, including a new boulevard providing a high quality connection between Piccadilly and the communities of East Manchester, a new arrival space and new public park.

In Piccadilly, Piccadilly Gardens and the surrounding area has seen significant improvements in recent years. Public and private investment has led to new high quality commercial space and leisure facilities. Piccadilly Gardens hosts a number of popular events, as well as being a popular space for people to meet and spend time. As a major transport interchange and one of the largest areas of public use in the city centre there is significant scope to increase the animation of the area.

A major priority for the city is to continue to press for the redevelopment of the former London Road Fire Station. This Grade 1 listed building, which has been vacant for over a quarter of a century, lies at a key gateway to the city centre, adjacent to Piccadilly Station. Its imposing form is often the first building that visitors to the city see from the station, and its dereliction is a major concern. The building is currently up for sale and the City Council will continue in its endeavours to pursue appropriate redevelopment of this site with the new owners.

Key priorities

The Piccadilly SRF is a high level document that demonstrates the potential scale of development that could be achieved. It sets the framework within which redevelopment proposals can come forward. It is expected that development would be phased, however, considerable work is needed to refine the framework into detailed plans for the different components of the Piccadilly area, once the proposals around HS2 are further defined.

Priorities over the next few years include:

- Agreement with Government and partners of the final HS2 station design for Piccadilly, including integration of the Northern Hub scheme and other transport proposals, such as Transport for the North.
- Developing a growth strategy for the station and wider SRF area, to include detailed plans, on a phased basis, for the different elements of the SRF areas.
- Management of Piccadilly Gardens and delivery of options to change the use of the area, and provide a range of events and animation.
- Align development with the delivery of a mixed use scheme at the adjacent former MMU campus at Aytoun Street.

Mayfield

The Mayfield area is included within the wider Piccadilly SRF and as such is positioned for significant development. However, the size and scale of Mayfield demands an individual approach to its redevelopment through a SRF.

The Mayfield SRF has evolved in response to changing requirements and market conditions, building upon extensive scoping work undertaken in 2010.

The vision for the development is aligned with the opportunities presented through the HS2 scheme in creating a distinctive new urban quarter that defines a key gateway into Manchester.

At 20 acres and adjacent to Piccadilly Station, the scale and location of the Mayfield development provide a unique opportunity not achievable in any other part within the city centre. Both the infrastructure and position of the development will attract major new employers, potentially including Government functions, and provide significant employment benefits for the city centre and for Greater Manchester. In addition to becoming a commercial hub, the Mayfield area will also offer desirable residential accommodation in addition to retail and leisure destinations. Coupling this vibrant mix of uses with a major new park at its heart, Mayfield will become a prominent city centre neighbourhood with a unique sense of place.

The SRF for the Mayfield area seeks to deliver:

- Up to 6,500 new office based jobs plus further job creation in retail and leisure.
- 1,330 new homes.
- 350 hotel bedrooms.
- High quality public realm including a new 6 acre city park.
- Accelerating transformational change at the eastern gateway area of the city centre.
- Spin-off regeneration benefits for surrounding communities such as Ardwick and New East Manchester.

Key Priorities

- Establish a delivery partnership with London & Continental Railways and TfGM (the key stakeholder partners in the area) to begin to drive forward the redevelopment of the Mayfield area.
- Continue to consult with key landowners and other stakeholders as detailed plans are progressed.
- Explore opportunities for potential government office relocations.

Medieval Quarter

Sitting in close proximity to the city's retail hub and the Salford City border, the Medieval Quarter is rich in cultural and historical significance. The area is home to Manchester Cathedral and Chethams School of Music, two renowned historical assets of the Manchester landscape.

Located within the Medieval Quarter, Victoria Station is currently undergoing a £44 million transformation programme. The station was opened in 1844 and encompasses a number of Grade II listed buildings and features that will be preserved and restored as part of the redevelopment. As the city's second

largest rail station, the redevelopment will facilitate expansion and meet growing passenger demand. The redeveloped Victoria Station will play a key role in boosting rail capacity across the north of England with faster, more frequent services in addition to facilitating the expansion of the City's Metrolink network.

Based in the Urbis building situated within Cathedral Gardens, the National Football Museum has quickly become one of the city's major attractions. In 2013, the museum attracted over 350,000 visitors and recently celebrated the milestone of welcoming its one millionth visitor. Since the last strategic plan, work has been completed to improve the aesthetic and functional impact of Cathedral Gardens additionally incorporating a children's activity area. The development of the gardens has required improved management of the area.

The area has benefited from the development and pedestrianisation of the neighbouring Greengate area, where a number of schemes have been delivered by Salford City Council. Additionally the remodelling of the Corn Exchange, and implementing the new second city crossing tram stop, will boost the profile of the Medieval Quarter, adding a unique food and drink destination within the grade II listed building, helping to alter the dynamic of Exchange Square.

Key Priorities

- Development of a strategy for the area, to provide an appropriate setting for the collection of historic buildings.
- Completion of improvements of the Corn Exchange, Manchester Cathedral and Cheetham School.
- Completion of the new Metrolink stop as part of wider transport infrastructure around Corporation Street.
- Provision of further workspace at Victoria Buildings.

Great Jackson Street

To the south west of the city centre, the Great Jackson Street area sits at a main arterial gateway. The area is bounded by Chester Road and the river Medlock to the north and west and Mancunian Way to the south. The site currently has a number of uses that include street and below street level car parking, light industrial units/warehouses and commercial premises.

The Great Jackson Street area will be transformed into a primarily residential neighbourhood, building on the opportunities provided by its adjacency to the city centre and surrounding developments such as First Street. The River Medlock will be utilised to create a distinct identity and sense of place, attractive to new residents.

A new strategic development framework was approved for Great Jackson Street in 2015, which outlines the vision to deliver a new urban neighbourhood. The framework takes into account the opportunities presented by neighbouring re-developments.

The new framework sets out a vision to create a high quality residential neighbourhood, with high value homes and high quality amenities that would support the growth of the economy. The area has different characteristics to the mixed-use nature of other residential areas in the city centre and there are already a number of amenities and attractions that would support its new function, including the River Medlock, Hulme Park, Castlefield Basin and a range of cultural facilities at the adjacent First Street area.

It is proposed to create a vibrant, safe, secure and sustainable community incorporating a range of dwelling types and tenures, including the private rented sector and market sales. This would include town houses with their own front doors and private garden spaces and one, two, three and four bed apartments, providing an attractive place to live for a broad range of occupiers. The residential product would need to be highly serviced and managed, and this must be incorporated into the overall design of the area. The size of individual units would be expected to meet the space standard guidelines recently agreed by the Council, and be large enough to provide for permanent homes. Developments will incorporate well designed and attractive communal facilities along with private amenity facilities, both at ground floor and at roof terraces. Proposals for the design and on-going maintenance and management of the public realm, including appropriate boundary treatments, must also be provided as part of individual planning proposals. Developments must achieve high levels of environmental and energy management and performance and help to reduce carbon emissions. They should also employ best practice in order to reduce water consumption.

Regeneration within the Great Jackson Street area will also encompass high quality open spaces and provide an attractive public realm. Strong pedestrian linkages will also ensure residents and visitors to the area can access neighbouring public realm spaces including Hulme Park and Castlefield with ease.

Key Priorities

- Delivery of first phases of new residential accommodation.
- Ensure effective linkages to neighbouring development areas, in particular First Street.
- Ensure high levels of environmental and energy management as part of the development.

Aytoun Campus

The Aytoun Street area is positioned at the heart of the city centre adjacent to the Village and Piccadilly. The area was previously occupied by Manchester Metropolitan University and is characterised by heritage buildings of distinctive architectural quality. The consolidation of University faculties into an educational hub on Corridor Manchester has provided the area with significant scope for redevelopment. Development of the Aytoun Campus area will see the area become known as Kampus.

The vision for Kampus is to create a vibrant and creative neighborhood that will be distinguished by its mixed use. The area will encompass significant residential accommodation in addition to leisure and retail outlets. In keeping with Manchester's residential and planning strategies, the residential component of the development will provide desirable homes for those looking to live in close proximity to the region's economic hub.

Kampus will also provide a distinctive leisure and retail offer. The position of the neighborhood makes it an ideal location for hotel accommodation. This will be supported by the provision of street level cafés, restaurants and bars in addition to retail amenities. Collectively this will provide Kampus with a distinct sense of place making the neighborhood an attractive place to both live and visit. Development of Kampus will include the imaginative and creative re-use of heritage buildings within the area.

The area is situated at a key city centre gateway location and benefits from excellent transport connectivity. Piccadilly Rail, Metrolink and Bus stations all sit adjacent to Kampus, and pedestrian linkages will be provided as part of the development.

Kampus will incorporate new public streets and squares providing the potential to host outdoor events and markets. Linking Little David Street to this developed public realm will provide a key connection to both Piccadilly rail station and the commercial core of the city centre to the west.

Redevelopment at the site provides a unique opportunity to secure the next phase of this area's transformation, building upon initiatives which have already secured improvements to Piccadilly Gardens, Piccadilly Station and the surrounding environs but which have yet to deliver the full potential of the area, particularly as new opportunities emerge from the plans to deliver HS2 to Manchester and as part of the University of Manchester's plans to vacate their North Campus.

Key Priorities

- Provision of new, high quality areas of open public realm.
- Delivery of the first phase of the Kampus development.
- Ensure the delivery of linkages to surrounding development area and neighbourhoods including Corridor Manchester, Piccadilly / Mayfield and the Village.

Salford Central & Greengate

The adjacent areas of Salford Central and Greengate are becoming increasingly important components of the city centre, reflecting the expanding economic boundaries of the Regional Centre. Consequently there is a need for sites within Salford Central and Greengate to incorporate physical links with developments on the Manchester side of the River Irwell, such as Spinningfields, St John's and the Cathedral Quarter.

Salford Central is made up of two inter-dependent, but distinct areas, Chapel Street and New Bailey. When complete the scheme will create around 11,000 new jobs, 220,000 square metres of commercial space, 849 new homes and 390 hotel rooms. The scheme is also delivering new public spaces and improved pedestrian / cyclists routes linking Salford University through a revitalised Chapel Street to the city centre.

Greengate, located adjacent to Manchester's Cathedral Quarter at the eastern end of Chapel Street, is an integral part of the city centre North Arc. Delivery of the Greengate vision will reconnect the historic cores of Salford and Manchester via a network of high quality public realm spaces and will also create a new corporate centre for Salford. The regeneration initiative is anticipated to deliver private sector investment in the region of £400million, 103,092sqm of commercial floor space, around 1,800 new homes and potentially 5,000 new jobs.

Significant progress has already been made in delivering the transformation of the Salford Central and Greengate areas, including:

- Successful delivery of the first phases of Salford Central, including a 143 bedroom riverside hotel, the Vimto Gardens residential-led mixed use scheme at Chapel Street and the 600 space New Bailey multi storey car park at Irwell Street.
- The launch of the £13.3million Greengate Square in February 2013, providing an iconic new city centre public space.
- The construction of No1 Greengate, a 497 one-two and three-bedroom apartments, townhouse and garden apartments development.
- English Cities Fund's One New Bailey scheme, which will deliver 12,540 sqm Grade A office space together with ground floor commercial units and new public square fronting Spinningfields Bridge.
- ASK's Greengate Embankment scheme, which will deliver 18,580 sqm of Grade A office space fronting Greengate Square in 2016.

Key Priorities

- Successful completion of the range of commercial and residential schemes currently under construction. Continued delivery of high quality development to ensure the growth and transformation of these key areas continues.
- Ensuring that the cross boundary linkages are provided to support and enable the successful growth and expansion of the city centre westwards, i.e. potential for new bridge connections, linking of public realm schemes across the River Irwell.

Water Street

Positioned adjacent to the River Irwell, Water Street is situated opposite the Salford City border and also a number of city centre neighbourhoods including Castlefield, Spinningfields and St John's. Since the previous strategic plan, a revised framework for regenerating the Water Street area has been developed.

The Water Street area is a gateway to the south western edge of the city centre and is part of the Castlefield Conservation Area. However, this site has suffered from a lack of investment over recent years despite its close proximity to the heart of Castlefield. Current occupancy within the area is predominantly industrial warehouse structures and single storey car parking. Subsequently the Water Street area has become characterised by vacant and underused sites and poor public realm.

The Water Street area presents a unique opportunity to develop a neighbourhood that will both complement adjacent neighbourhoods and offer a significant contribution to the continued economic growth of the city centre. A strategic regeneration framework for the Water Street area is in place to guide investment and development within the area over the next 5 – 10 years.

The regeneration framework for the Water Street area sets out the vision to develop a sustainable mixed used neighbourhood that will encompass residential accommodation, office space and retail units alongside developing an exceptional public realm that utilises the area's river side location. Developing the Water Street area will improve the connectivity and linkages with surrounding neighbourhoods including Castlefield and the relatively isolated St. Georges Island.

Key Priorities

- Implementation of the Water Street SRF.
- Creation of effective linkages with the neighbouring Castlefield and St Johns areas.
- Manage the impact of the Ordsall Chord Works.

- Ensure appropriate traffic management systems are in place, working with Salford City Council and Transport for Greater Manchester.

Irwell River Park

The River Irwell provides a key link connecting the Manchester, Salford and Trafford sides of the regional centre. The local authorities have been working in partnership over a number of years to deliver a new connected area of high quality public realm and open space along the length of the River Irwell and Manchester Ship Canal from Salford Quays through the regional centre to Peel Park and the University of Salford.

Strategic pedestrian and cycle routes across Irwell River Park will continue to improve connections between Salford and Manchester. Specific achievements to date include:

- Over £660million of private and public investment to date across the 280 hectare new urban park has provided fantastic public spaces and over 5km of new route ways.
- The provision of three new bridge connections, two of which are in the city centre area - the £1.6 million pedestrian connection between Spinningfields and New Bailey and a new bridge at Greengate connecting to the Cathedral area - both of which opened in 2012.
- Internationally acclaimed destinations along the Irwell River Park corridor such as MediaCityUK, Spinningfields, Greengate and the emerging New Bailey / Chapel Street development are transforming the waterside environment and creating new opportunities for residential and commercial investment that will build confidence in future growth.
- Completion of Bruntwood's Riverside development, which has created a new riverside connection and direct link from Spinningfields Bridge to Chapel Wharf.
- Secured funding to deliver infrastructure for a water taxi service with 5 landing stages between MediaCityUK and Chapel Wharf.
- Creation of a temporary community park and play area at Victoria Street, as part of the experimental closure of the road, linking through to the Cathedral and Greengate Bridge.

Key Priorities

The development of further sustainable transport connections and animation of the routes and spaces will be the major priorities moving forward. Key areas of focus include:

- Creating new strategic bridge connections between The University of Salford, Peel Park, The Meadows and onto Chapel Street utilising the opportunity through the RIBA Design Competition. The linkage potential to the River Irwell through Middlewood and across to the Museum of Science and Industry is considered vital.
- Maximising the potential arising from Ordsall Chord and linking through to Salford Central Station where the priority for additional platforms will become paramount.
- Developing new cycle and pedestrian bridge connections between Salford and Manchester to complement and underpin development aspirations at St John's, Middlewood and Salford Central Riverside.
- Developing new shared public realm spaces around the New Bailey Street area to manage traffic and pedestrian movement and enhance environmental quality.
- Collaborating to progress animation of key spaces along the River Irwell. Animation of the river stretch between Salford Quays and Greengate/Cathedral, including Chapel Wharf, will become increasingly important to stimulate use and vibrancy. Animation of the waterway through bespoke events will also help to deliver IRP's aspiration to create an international waterfront destination at the heart of the Manchester City Region.

Retail Core

The city centre is a major retail hub within the UK, and acts as a major tourism attractor to the wider city region. It is one of the largest retail centres outside of London and was worth an estimated £3.4bn to the local economy in 2013.

The retail sector employs in excess of 15,000 people in the city centre, across around 2,500 businesses, which accounts for 21% of the sector's total workforce in Greater Manchester.

The portfolio of major designer brands acts as a significant draw to international tourists, complemented by the growing mix of high quality food and drink operators at all ends of the market.

Emerging from a difficult economic context many of Manchester's major stores are among the best performing in their own groups and footfall continues to be buoyant. Many retailers have also seen an increase in average basket spend or overall sales. The city centre continues to house and attract a number of flagship stores within Manchester Arndale and surrounding shopping destinations such as New Cathedral Street and King Street. Opportunities exist for Manchester Arndale to improve its configuration and utilisation so it can

continue to attract new occupiers and respond to the changing nature of the retail offer.

A priority for the city now is to realise the redevelopment of the Ramada site. This was a key piece of the regeneration plan, following the 1996 bomb and the development of the bomb damaged area masterplan. This site occupies a strategic location between the retail core and the Mediaeval Quarter, and has the potential to augment the diversity of retail, residential and leisure facilities in this area.

Key achievements since the last Strategic Plan include:

- Footfall in the city centre has remained strong despite challenging conditions for retail nationally. Manchester Arndale welcomed over 41 million visitors during 2013.
- Manchester was named as the top retail destination in the country outside of London, in terms of revenue generated, for the second year running in the 2014 Retail Vision Report by Callcredit Information Group, generating £910m in retail spend.
- The establishment of the Heart of Manchester BID, which was launched in April 2013 (see below).
- A number of high-profile stores have expanded or opened in the city centre, including the expanded Apple store in Manchester Arndale. Other significant new lettings in the city centre include Michael Kors, 7 For All Mankind, Rapha Racing Club, Joy and Thomas Sabo.
- There has been a growth of independent retail outlets in the city centre, which feed in a diverse and vibrant city centre offering.
- In a recent Greater Manchester residents' survey, 82% of all respondents classed Manchester city centre's shopping offer as 'excellent'.

Different areas within the city centre's retail core have distinct characteristics and appeal to different types of consumer. Where Market Street relies on volume of footfall, King Street is positioned for the higher-spending, brand loyal shoppers. New Cathedral Street has added to the city centre retail offer, establishing itself as a high-end luxury brand destination.

We must ensure that Manchester city centre can remain sensitive to the changing dynamics of the retail market, and maintains its reputation as a premier retail destination through a continual review of the retail offer and targeted action.

We have recently carried out research into the position of the city centre, both in relation to perceptions of other city centres and of shoppers who use Manchester city centre. This has helped us understand what needs to be done to further improve and consolidate the position of the city centre as a major shopping destination.

In particular, the research has highlighted the need to attract customers from a wider area and range of backgrounds to shop in the city the whole year round;

to encourage more independent retail; and support the growing leisure industry in the city centre to promote footfall.

Heart of Manchester BID

The Heart of Manchester BID is a collective initiative developed by Manchester's city centre retail community. Launched in April 2013, the business improvement district encompasses more than 370 retailers across Market Street, Exchange Square, New Cathedral Street, King Street, St Ann's Square, Deansgate, including many of the retailers within Manchester Arndale.

For a period of five years (2013 – 2018), the BID will focus on delivering customer service and promotional initiatives that aim to improve the attractiveness of the city and encourage more high-spending visitors. It is designed to improve footfall and dwell time in the city centre through a mix of events and marketing. It has an annual budget of £1m, funded by the retailers and is delivered by CityCo.

Since launch, the BID has supported and promoted Manchester's retail offer through a number of initiatives and major events to drive footfall including:

Dig the City – A unique city centre urban gardening festival offering a programme of events aimed at families, city workers and affluent high spenders.

Chinese New Year - city-centre celebrations that showcase a variety of contemporary and traditional Chinese culture driving attracting new and increased visitors to the city centre.

Manchester Student Takeover – An student exclusive evening of shopping, events, music and fashion to increase sales.

City Centre Guide Book - A new promotional tool that showcases the best of the city's retail, leisure and cultural highlights.

City Hosts - Providing a friendly and welcoming customer service on the streets and face-to-face liaison with BID businesses.

Key Priorities

- Sustained PR to promote Manchester as the UK's top regional retail destination, locally, regionally and nationally.
- A retail-focused magazine to promote the city's exceptionally diverse retail offer.

- Improving the Performance of King Street. In spite of recent difficulties, King Street is still considered to be one of the city's most aspirational retail areas and work is underway to improve the offering.
- Integrated mobile solutions to ensure the retail core is up-to-speed with developments in technology and talking to customers in a cohesive way.
- Encourage further national events such as Vogue Fashion's Night Out. This will assist in driving late night footfall.
- Ongoing action to encourage more independent retailers and leisure operators into the city centre, to further diversify the offer and attract and footfall.
- Look into introducing more markets into the city centre, in different areas and throughout the year, building on the huge success of Manchester's Christmas markets.
- The redevelopment of the Ramada block on Blackfriars Street.

Castlefield

With a unique identity and individualistic landscape, Castlefield offers an attractive residential location in addition to a variety of popular visitor attractions and a collection of vibrant restaurants and bars. As Britain's first Urban Heritage Park, the area is characterized by the Bridgewater canal, world's oldest industrial canal in addition to its cobbled streets and tranquil backdrop.

The area's heritage is demonstrated with an excavated Roman fort dating back to 79 AD, sitting beside the open-air Castlefield Arena, a location for a range of events. Alongside its Roman and Industrial context, Castlefield is also home to the Museum of Science and Industry. In 2013, MOSI attracted over 677,000 annual visitors making it the City's most visited attraction.

Within the area, there is an active resident and business forum and the Castlefield residential community remains one of the City's most desirable neighbourhoods offering residents a balance of city centre living with a tranquil, waterside backdrop. The accommodation offer within the area is currently being refreshed with the addition of the Potato Wharf and One Ellesmere Street developments. The developments will provide modern waterside living along with the differentiated offer of family focused city centre accommodation respectively.

Castlefield will continue to benefit from the growth of bordering city centre neighbourhoods including Spinningfields, First Street and the planned St John's area.

Key Priorities

- Delivering full integration with the proposed St Johns development
- Ensuring the Ordsall Chord is designed and implemented in a way that minimises its impact on the area.
- Work with the Castlefield resident's forum to investigate the feasibility of improving the Roman Gardens.
- Work with MOSI around emerging development plans.
- Ensure residential developments are balanced with the needs of the area.
- Secure a longer term usage for the historic Upper Campfield Market Building to add to the vitality of the area.

Northern Quarter

The Northern Quarter is a unique area of the city centre. The area is characterised by its distinctive architecture, redbrick alleys and converted grand warehouses. The atmospheric neighbourhood runs adjacent to the mainstream presence of Market Street and the Piccadilly area, yet the concentration of independent retail and leisure outlets in the area and the 'hotbed' of cultural production and consumption sets it apart.

This non mainstream offer is important for any 'global' city and gives the Northern Quarter a unique identity within both the city, and to some extent the UK. With a growing reputation, the area attracts a high number of visitors, providing an important contribution to the economy of the city centre. The area houses a large number of small and growing digital, media and technology based companies, as well as those operating within creative and cultural industries.

Due to its nature, the regeneration within the Northern Quarter area is organic and incremental and therefore more subtle, and ultimately less predictable than in other parts of the city centre. The aim of activity within the area is to bring about change in a way which retains the distinct identity of the area and builds on its strengths to produce a creative and cultural destination, with a high quality built environment, attractive to businesses and residents, and providing opportunities for private sector investment.

Since the last strategic plan we have seen further consolidation of the Northern Quarter's position as a central creative quarter of the city. Key achievements include:

- Sustained high levels of business occupancy within both Manchester Craft and Design Centre (MCAD) and Afflecks Palace.
- The completion of the Swan Square development, providing competitive, flexible workspace for small business start ups, whilst also opening up the entrance to the Northern Quarter from Swan Street / Tib Street.
- Work is nearing completion on the final phases of the Smithfield development, with one Smithfield Square now complete, providing 77 new apartments with ground floor retail space, and an initial “shell” refurbishment of the Mackie Mayor building is now underway in order to enable future development. All the apartments sold off plan, which affirms the renewed confidence in the city centre residential market.
- Additional greening in the area through provision of community outdoor space around the Church Street car park as part of Cityco’s Garden City project, and in Stevenson Square, where new trees, hanging baskets and a ‘green roof’ on top of the disused toilets have been established.
- Completion of the Hive Phase 1 on Lever Street which is now home to the North West Arts Council and a number of other local businesses.
- Regular art displays and creative events in public spaces and businesses.

Key Priorities

- Building on the successes of the area’s evening economy by promoting usage as a day time destination. This includes encouraging a range of events within the area and exploring the option of establishing regular markets.
- The systematic marketing and promotion of the area, to better put the area on the map, to encourage more and a greater variety of people to visit and move through the area and to encourage new and more diversified investment.
- As part of the final phase of the Smithfield development, secure the future redevelopment of the Mackie Mayor building, the only remaining complete structure from the original historical Smithfield Market. We will work with Muse (the developers of Smithfield) and other partners to bring the building back into productive use.
- The development of the currently derelict Coccozza Wood building on Oak Street, either in its own right or as part of an extension of the Band on the Wall complex.
- Consider further remodelling of Stevenson Square to further enhance the environment and encourage further investment.

- Explore options to open up links to Ancoats/New Islington and New Cross, spreading the creativity of the Northern Quarter eastwards and also maximising the opportunities presented by the growing communities in those areas.

Chinatown

Manchester's Chinatown is distinctively 'Mancunian', and representative of the Chinese community within the City. The area retains a strong sense of tradition and community spirit whilst offering a unique visitor experience.

Manchester's Chinese community is the largest in the UK outside of London and third largest in Europe, with people of Chinese origin constituting the only single ethnic minority community of any number within the city centre.

Manchester's Chinatown emerged in the 1970's. Despite being moderately small in geographical scale, the area covers a concise, well defined area lying at the heart of the city centre. It is strategically placed between main retail core, the Piccadilly gateway and the Civic Quarter. Chinatown is characteristically and functionally different to any other part of the city centre and of great strategic importance to Manchester as a city of distinctive areas.

The area is predominantly served by restaurants, representing a range of Asian cultures which make up over 50% of the occupied space. In addition, Chinatown is home to a number of supermarkets, shops and Chinese physicians.

To ensure continued growth and development within the area, Manchester City Council are working in partnership with Cityco and relevant stakeholder groups including business forums and resident groups. This partnership working will be imperative in securing further investment and ensuring the continued development of the area.

At the centre of Chinatown, around Faulkner Street, is the Arch and Pagoda which since the 1980s have signified the heart of the area and represent a landmark feature celebrating the identity of the local community. As a residential location, Chinatown is again relatively small when compared to other global examples, with approximately 420 residents in the area. This is however demonstrates an increase of 60% over the last decade, which is significantly higher than the wider city centre population trend of a 28% increase.

Over the last few years, the city's relationship with China has taken centre stage as the drive to increase trade and investment between the two countries has been placed at the core of the internationalisation agenda. The city continues to maintain its Civic links with Wuhan, and Chinatown acts as a showcase for the Chinese community and our ongoing relationship and commitment to joint working with China.

The area hosts the city's Chinese New Year celebrations. This event has become one of the fastest growing visitor attractions in the city's events calendar drawing in hundreds of thousands of visitors to the city over the celebration weekend, and presenting a fantastic opportunity to celebrate Chinese culture and heritage and our local Chinese assets. Over the last two years, these celebrations have been extended to other parts of the city centre as part of the BID.

Through the Manchester China Town Community Group - a wide ranging group of organisations and individuals who have a direct interest in the health and wellbeing of Chinatown and of a flourishing Chinese and South East Asian culture within the city – the promotion and development of Chinatown has become increasingly important to the work of the city centre regeneration team.

Key Priorities

- Whilst Chinatown is adding to the city's visitor and tourist offer, and is a must see destination for international visitors and tourists, the area has the potential to significantly improve its contribution to the economy of the city centre and further develop as a unique and distinctive cultural destination serving both the needs of visitors and its own local community.
- Work collaboratively with businesses and residents to improve the quality of the environment and future maintenance strategy.
- Work with local partners to elaborate an investment and development strategy to ensure that Chinatown fully exploits its potential.
- Develop a strategy in conjunction with CityCo and the Chinatown forum, to establish the area as one of the most eminent of its type in the world.

The Village

The Village is a truly unique and vibrant area of the city centre. Flourishing Gay culture has helped develop the area into a village-esque community complete with a combination of residential, commercial and leisure destinations. Situated alongside the Rochdale Canal, which runs through the city centre, the Village makes an essential contribution to the local economy, attracting between 15,000 and 20,000 visitors each weekend.

A defining quality of the area lies in it being the home of the city's Lesbian, Gay, Bisexual and Transgender community, providing a safe and welcoming vibrant destination that is world famous for its night time and leisure scene. The Village boasts a range of unique and distinctive assets including a number of Victorian and Edwardian buildings, a canal side location, a pedestrianised street affording outdoor space to the venues, and a proximity to the green space of Sackville Gardens.

The Village hosts Manchester's annual Pride event, attracting thousands of visitors from across the world. Manchester Pride has become a lynch pin event in the tourism calendar for the city. Held over the August Bank Holiday, the event attracts in excess of 40,000 visitors, securing approximately £20m in economic benefit.

Over recent years the demographic of visitors to the Village has become increasingly inclusive of not only the Gay community, but tourists and families alike. It has been able to effortlessly welcome a much wider audience without losing its sense of identity. With its vibrant night time offer, the Village is one of the most effervescent within the city centre, and its range of dining options consistently attract a cosmopolitan clientele.

The Village is home to one of the most concentrated clusters of independent businesses within the city centre. Amongst this commercial offer, the area maintains a close knit business community with 25 of the venues in the area being members of the Village Business Association. The area has both a commercial office space offer in addition to a diverse residential component that includes students and a proportion of the city's Chinese population.

The area has a number of transport linkages with the neighbouring Piccadilly Bus and Metrolink stations. The Curve Bridge links the village to the Piccadilly approach and Rail Station.

Key Priorities

- Redeveloping the Origin Site, which will be key to diversifying the area's offer and strengthening functionality and linkages with other parts of the city centre.
- The Friends of Sackville Gardens group has been reformed and work is being undertaken to look at holding various events in the gardens, many of which involve the adjoining Manchester College.
- Maximising the use of the area's assets, particularly the canal towpath and Sackville Gardens, to enable them to strengthen the daytime offer and provide a more varied night time offer.
- Developing and creating stronger links with neighbouring areas, as part of considering the future role and offer of the area, including the new Aytoun Street area which will see complimentary redevelopment on the opposite bank of the canal.
- Establishing a multi agency approach to develop a longer term vision for the area that capitalises on its unique identity solidifying its iconic status.

Infrastructure

The infrastructure of the city centre has developed significantly since the last Strategic Guide was produced. In order to achieve the objectives set out for the city, continued further development of this, encompassing not only transport and environmental infrastructure but also digital connectivity, is essential.

Transport

Transport is a critical component to the ongoing economic growth and revival of the city centre. An efficient transport system is essential for a prosperous economy, improved accessibility, greater mobility and a better environment. In short, a world-class city needs a world-class transport system. There are two key principles for taking forward transport in the city centre: ensuring that the city centre is the most accessible place in North West England; and making it an attractive and easy place to move around.

Over 15 million people currently live within two hours' drive time of the city centre, with 72% of peak hour trips now taken using forms of transport other than the car. Overall, the proportion of non-car journeys increased from 63% in 2002 to 71.7% in 2012.

There is the potential for employment in the city centre to grow by up to 50,000 over the next 10 years. This anticipated employment growth is expected to lead to 30% more peak time trips to the city centre. At the same time, the population within and surrounding the city centre is expected to grow. All of this will result in the need for improved access into and across the city centre, both by an enhanced public transport system but also by good walking and cycling routes.

Significant improvements have been made in public transport over the last few years, including the opening of the Metrolink lines to Ashton, Oldham and Rochdale, East Didsbury and Manchester Airport, providing improved access to the city centre, with £1.5 billion being invested in transport through the Greater Manchester Transport Fund. Since its inception, annual passenger journeys on Metrolink services have risen steadily from 7.6 million journeys in 1992-1993 to 30 million journeys in 2014.

An ongoing priority over the next few years is the delivery and co-ordination of the major transport infrastructure works across the city centre, and ensuring maximum ease of movement for pedestrians, passengers, drivers and cyclists. This will incorporate a major communications campaign to encourage greater public transport use.

In addition to delivering economic growth the devolution settlement will impact on the city's transport infrastructure. Responsibility and provision of a transport budget now sits with the Greater Manchester Combined Authority. This will provide the combined authority with further ability to shape bus services including fares, routes and frequency in response to local factors.

A major impact on the transport infrastructure within Manchester in the long term will be delivered through High Speed Rail. The Government announced the preferred route and stations for HS2 Phase Two (West Midlands to Manchester) in January 2013, which proposes two stations in Manchester, one at Manchester Piccadilly, and the other at Manchester Airport. The HS2 scheme will provide a number of opportunities including employment and supply chain opportunities for local businesses in the city region. HS2 Ltd predicts that the whole HS2 scheme could support up to 100,000 new jobs.

Key Priorities

Considerable further improvements to public transport, cycling and walking routes are planned over the next few years to support the continued growth of the city centre. Schemes include:

- The second city Metrolink crossing through the city centre to provide the capacity for the current and future extensions of the network – which will result in Manchester having the largest tram network in the country. This will include a new station at Exchange Square and upgraded stations at Victoria, St Peter's Square and Deansgate Castlefield. The extensions and service improvements are expected to treble the number of passengers accessing the city centre by tram by 2021.
- Provision of new rail capacity through the Northern Hub railway schemes, which will improve links to a number of Northern locations, including Leeds, Sheffield, Liverpool and Preston and accommodate a further 44 million rail journeys. Projects include a rail link between Manchester Victoria and Manchester Piccadilly stations (known as the "Ordsall Chord") and improvements at Victoria, Piccadilly and Oxford Road stations. All the Northern Hub infrastructure improvements are currently scheduled to be completed by 2018.
- A £44m refurbishment programme to Victoria Station to enhance the facilities at the northern edge of the city centre, as part of the Northern Hub and Metrolink works. The project includes restoration of the station's period features, new lighting and glazed entrances.
- Completion of improvements to Salford Central Station, to include new platforms to enable the new services provided by the Ordsall Chord to stop there, and to improve the platform environment.
- The Bus Priority Package, which is one of the largest investments in the sub-regional bus network for decades (totalling over £50m). With the potential to deliver major improvements to bus travel across the city region. Within Manchester it will deliver major benefits in particular to Corridor Manchester, where a reduction in general traffic is proposed, providing the opportunity to provide complementary

improvements to cycling and walking infrastructure, better public space and new “smart” travel information.

- Improved cycle routes and facilities, including improved access to the city centre from the north and east Manchester, together with cycle maps, education and promotion to encourage more people to cycle.
- Measures to encourage further traffic reduction and improved traffic management in the city centre. In particular, encouraging more traffic to use the Inner Relief Road through smarter signage and an intelligent Traffic Management System, and considering junction and road layout alterations (e.g. at the junctions of Trinity Way, Regent Road, Water Street and along Great Ancoats Street).
- Smart Travel information to deliver real-time traveller-focused journey information across all modes of transport, allowing people to better plan their journeys, and smart ticketing giving access to all forms of public transport.
- Implementing the devolution agreement to direct more responsibility for transport decisions and resources to Greater Manchester. Further plans to devolve the management of rail franchises to local authorities across the North of England offer the opportunity to ensure that rail services are aligned with wider plans to deliver economic growth across the region and are the most significant example of more devolved decision making.

Digital Connectivity

Manchester’s ambition is to become one of the world’s most competitive and inclusive digital cities by 2020. The aim is to maintain and continue to grow the competitive advantage for residents and businesses, and hence promote economic growth. Manchester’s digital and creative economy is increasingly important to the economy of the city centre and Greater Manchester as a whole. At present 69% of businesses across Manchester as a whole currently have access to super-fast broadband, with 23% having ultrafast broadband access. Manchester’s digital and creative sector is growing faster than anywhere else in the UK, outside of London, with approximately 5,500 people now employed in the city centre.

Since the previous City Centre Strategic Plan, Manchester has achieved a number of steps towards becoming a global leader in digital connectivity:

- Free public wifi on trams is being trialled and with the potential to roll-out shortly.
- Over 100 public buildings will have free wifi available shortly, starting with the Central Library where digital demand has never been in greater demand. More than 75,000 Wi-Fi sessions have been logged across a

variety of devices in the Central Library since it reopened – an average of around 12,500 sessions per month.

- Manchester's Central Library Demonstrator has a great range of modern technology for businesses to try out for free, from 3D printing and video-conferencing to the latest Apple Mac design programmes and even Google Glass and a wide digital training programme.
- 650 businesses have utilised connectivity grants to fund the capital costs of upgrading their business connectivity to date. Together they expect to create over 1000 jobs as a result.
- There are now over 80 Freebee Manchester access points across the city centre allowing free wi-fi access for up to 30 minutes in key locations, including Albert Square, St Peter's Square and St Ann's Square. Free access is also provided in Manchester Libraries and Art Gallery.
- The UK's largest private cloud – UKFast - was launched at City Tower in June 2013.
- A network of 10 miguide screens has been installed within the city centre. Developed in partnership with MediaCo and Magnetic North, these digital kiosks provide residents and visitors to the city centre with information around events, attractions, shopping, food and drink, accommodation and transport. Over the last 12 months the miguide screens have been well used, being viewed by over 3.9 million people.

Key Priorities

The Manchester Digital Strategy was put in place in 2012 in to facilitate the city's aim of becoming a leading digital city and to promote digital connectivity. Actions of particular importance to the city centre include:

- Continue the delivery of the business connectivity voucher scheme to stimulate demand for super and ultra fast broadband.
- Encourage commercial and residential development partners to provide improved connectivity as part of the design and build phase of developments.
- Enable the digital infrastructure on Corridor Manchester to benefit other parts of the city centre through delivery of Corridor Manchester's Digitisation Project. This involves a pilot linking the Northern Quarter to Corridor Manchester through a superfast wireless loop to connect the cluster of creative and digital businesses located there. It is planned to roll this out to provide point to point ultra high speed wireless to other businesses in the city centre.
- Further development of innovation hubs and ecosystems, including Madlab, Innospace and Manchester Metropolitan University's "The Shed, a recently opened digital innovation studio situated on Corridor Manchester.

- “Go on Manchester” Digital Inclusion Campaign to encourage businesses to upgrade to faster connections, and have presence, trade and grow using the web. Business and individual Digital Champions are being recruited to support and encourage others.
- Work with the universities to attract and retain graduates with digital skills.
- Develop high level industry relevant apprenticeship frameworks through Employer Ownership of Skills.
- Attract private sector skills initiatives, e.g. the expansion of Hyper Island, based in the city centre, and providing people the opportunity to learn and grow to meet the technological challenges of the future.
- Work with partners such as MIDAS and the Manchester Growth Hub to support digital based business start ups and relocations in the city centre.

Environmental Infrastructure

In order to further develop and maintain a destination that is attractive for residents, businesses and visitors alike, it is essential to develop a strategic approach to the environmental infrastructure of the city centre. Green and blue infrastructure makes up 14% of the city centre. Parks, community spaces and greening through green roofs, canals, planters and other areas are an important part of the character and appeal of the city centre. This creates an attractive environment for residents, visitors, workers and investors, adapting the city to climate change, and enhancing biodiversity.

Improving the quality and functionality of this existing green and blue infrastructure, and delivering new high quality Green Infrastructure as part of new developments will continue to be a key part of the growth of the city centre. Further information is set out in the Manchester Green and Blue Infrastructure Strategy.

Low carbon initiatives within the city centre will play a pivotal role in facilitating and sustaining a high quality environmental infrastructure. High level plans are in place to ensure that existing and planned city centre buildings can be served with secure, affordable and low carbon supplies of energy. Starting in the Civic Quarter in 2017, a network of pipes will be installed across the city centre to provide hot water and electricity to connect buildings. In parallel with the opportunity to improve the energy efficiency of existing buildings and to install solar PV, new energy infrastructure will help city centre businesses and residents to contribute towards Manchester's target to reduce CO2 emissions by 41% by 2020, from 2005 levels. Future developments will be shaped with the strategic delivery of the city centre's environmental infrastructure as a priority.

Manchester city centre has a number of waterways at its heart that contribute significantly to the environmental landscape whilst enhancing connections between the city centre neighbourhoods, and the surrounding areas.

The River Irwell runs along the city centre boundary with Salford. The Irwell River Park Scheme, described earlier in this plan, is creating a high quality, green walkway along the River from Salford Quays through the city centre, and on to Peel Park. Greater Manchester has been successful in securing local sustainable transport funding through the Department for Transport to provide maintenance and infrastructure improvements along the River. As part of this, the possibility of developing an Irwell River Park Water Taxi (WAXI) is also currently being explored.

During the development of industrial Manchester, canals were pivotal in the prosperity of the city and still hold a key role in the character and enjoyment of the city centre. The Rochdale and Bridgewater canals cut through the heart of the city centre, featuring heavily amongst the landscape of Piccadilly, Castlefield, Deansgate Locks and Canal Street.

Key Priorities

- Improving the cleanliness, safety and usage of the canals. Projects will include a scheme to enhance the lighting along the Bridgewater Canal through Castlefield, to improve safety and accessibility, to be delivered within the next two years.
- Working in partnership with Peel Holdings, the Bridgewater Canal will also benefit from a cycle improvement programme, improving linkages between Trafford and Manchester City Centre. This work will be completed in three phases:
 - Section one: Europa Gate to Sir Matt Busby Way
 - Section two: Wharfside Way to Manchester Boundary
 - Section three: Manchester Boundary (West of Hulme Hall Bridge) to Deansgate.
- A Water Safety Group is now in place, involving officers from Manchester City Council, Greater Manchester Police, Greater Manchester Fire and Rescue Service, the Canals and Rivers Trust, and Cityco. The Group is looking in particular at solutions for improving safety along the Rochdale Canal, close to Piccadilly Station.
- Implementation of the revised maintenance agreement for the Rochdale Canal. The agreement documents the partnership arrangements and shared roles of Manchester City Council, the Canals and River Trust and Cityco. Effective partnership management will enable the successful maintenance of the city centre's canals.
- Explore projects to animate and encourage use of the canals, for example, a green installation at Bridgewater Basin (close to the Bridgewater Hall), to provide a habitat for species as well as a dramatic visual impact.

7. Looking to the Future

Commercial Development

Although the commercial market is buoyant, unless strategic action is taken, the impact on availability will see supply squeezed, prime rental rates increase and will limit the opportunities to satisfy large scale and footloose enquiries.

There was significantly less availability of grade A office space (250,000 sq ft) in 2014 compared to 2009 (600,000 sq ft). Over 80% of 20,000 sq ft plus units leased in 2014 were of Grade A quality, underlining healthy occupier demand for high quality.

As we develop masterplans for key areas of the city centre, space for commercial accommodation which is flexible and able to meet the needs of the market, will be central to those plans. Tools such as the Greater Manchester Investment Fund, which enable us to fast-track those developments to ensure supply does not dry up and supports the liquidity of the city centre, are essential as is the ongoing relationship with the private sector and property community.

The market is also showing increased confidence in Grade B supply in Manchester. There does however, remain an increasing pressure to provide a growing pipeline of accommodation, and protect strategic sites for commercial development, particularly at grade A, in order to satisfy demand over the next few years, as investor confidence picks up and new entrants to the market seek out commercial space in Manchester.

The market is responding to these opportunities, as for the first time in several years a number of speculative developments are coming forward, at Spinningfields, St Peter's Square and at Victoria Buildings among others.

Taking account of our strategic sites ie St John's, NOMA, First Street, Piccadilly and Mayfield etc, we are confident that there is sufficient capacity to support the level of anticipated growth in commercial space, for the foreseeable future.

Residential

Demand for city centre living that embraces different models and tenure types is rapidly increasing, and is a key attractor for a younger population who seek different lifestyle choices. The residential trajectory is expected to continue as a result of the continued increase in employment predicted in the city centre, as well as other factors such as higher levels of graduate retention.

This significant growth is also aligned to major demographic change within the city: with a decrease in the number of over 65's; an increase of 40% in the 20-25 age group; and under 5's the fastest growing age group.

Resident based growth is directly related to the city's economic growth which has been driven by the rapid expansion of a number of key sectors, particularly

financial and professional services, media and creative, public administration, leisure, tourism and the service sector. Demand for residential accommodation will be a result of increased employment in the city centre economy and these are sectors that will continue to underpin the City's growth prospects in the future.

The next decade will see another surge in growth, with independent economic forecasts indicating that the city will benefit from:

- A further 50,000 people choosing to live in the city, increasing the population to over 560,000.
- An additional 40,000 jobs, increasing city employment to over 400,000 jobs.

The drive to provide new residential development is reflected in Manchester City Council's Residential Growth Strategy published in June 2013. This recognises the urgent need to accelerate the pace of housing delivery in the city given the critical relationship between employment and housing growth, the importance of a vibrant construction sector, and a successful housing market to widen economic performance.

The city centre has benefited from long-established residential neighbourhoods such as Castlefield, the Northern Quarter and the Village. However the need to identify and develop new city centre neighbourhoods is essential to satisfy existing and anticipated demand. Expanding residential development across the city centre will also include providing a differentiated residential offer. Traditionally the city centre residential offer has focused on apartment properties. New residential properties will also need to include family focused accommodation of varying sizes, with communal facilities, a range of amenities and a high level of environmental management.

The city centre and edge of centre neighborhoods are also seen as locations where young and skilled workers will choose to live, and institutional investors are increasingly interested in the development of "Build to Rent" apartment schemes that are designed and professionally managed on a medium to long term "hold" basis, given the continued restrictions on mortgage finance and an increasing tendency for economically active individuals in the age bands 25 – 40 to rent property rather than purchase.

To secure the successful delivery of the Manchester Residential Growth Strategy the Council has entered into a collaboration arrangement with the Homes and Communities Agency (HCA), the government's housing, land and regeneration agency to focus both organisations' efforts in delivering residential development opportunities in the city over the next few years.

The collaboration, entitled "Manchester Place" will provide the means by which the City Council and the HCA will ensure the delivery of agreed strategic residential and commercial development initiatives within the city, helping to drive forward the growth of the residential market at the core of the conurbation.

A number of Priority Investment Areas have been agreed which are consistent with the objectives of the Greater Manchester Strategy, the City Council's Residential Growth Strategy, the Manchester Core Strategy, and relevant Manchester Strategic Regeneration Frameworks / Regeneration Frameworks.

Retail

As the UK's top performing retail destination outside of London there will be a continued, concentrated effort to support and diversify the existing retail offer in addition to facilitating new entrants into the city centre.

Retail patterns are clearly changing nationally and globally, with the growth of multi-channel shopping formats, and this is expected to continue in future years. Manchester city centre, as with other city and town centres across the UK, is sensitive to the evolving needs and dynamics of the retail market, and there has been an impact on the main retail areas in recent years. For example, there has been a changing balance between retail and leisure outlets in a number of areas.

Despite this, Manchester city centre's retail offer continues to perform well, as highlighted elsewhere in the Strategic Plan. There is evidence that formats such as 'click and collect' and 'holistic shopping experiences' are an important part of enabling continued strong performance, with a number of the major stores anecdotally reporting that these forms of shopping are significantly boosting their sales. Given the popularity of the city centre, and the number of people who access it for work and leisure, there is considerable potential for these alternative types of shopping to expand and diversify, to help to continue to drive footfall and sales.

Having a strong number of independent retailers will create an experience unique to Manchester, and therefore both increase footfall to the city centre and differentiate the offer from other UK core cities. Manchester currently has a strong offer with a higher proportion of independent retailers than both Birmingham and Leeds, with areas such as the Northern Quarter important in providing a different offer. The development proposals brought forward for NOMA and St John's will reflect the need to establish a niche identity differing from the current retail offer in other city centre retail districts.

The next two years will also see the Heart of Manchester BID come up for renewal. At this point the BID will have been supporting the retail offer of Manchester city centre for 5 years and based on the impact and delivered outcomes, retailers will decide whether to continue to fund the initiative.

Leisure and the Evening Economy

It is estimated that 150,000 people visit the city centre each weekend to enjoy the nightlife. Manchester city centre has a wide range of leisure and cultural offers. This includes over 200 restaurants catering for a vast range of eclectic tastes, cinemas, theatres, art galleries, music venues such as Bridgewater Hall and Manchester Arena, and a growing number of bars, pubs and clubs.

The city centre and its night time economy are extremely important to Manchester. Having a vibrant leisure and cultural offer is a key factor in people's choice about where they live, work and visit. It also contributes hugely to Manchester's economic growth. Between 2007 and 2014, the number of licensed premises in the city centre increased from 609 to 827, a percentage increase of 37%. The management of the night-time economy will continue to be developed through a partnership approach and require careful management to ensure that licensed premises do not impact on surrounding residential and commercial premises.. This partnership consists of Greater Manchester Police, Manchester City Council, sector groups including the Pub and Club Network, Hoteliers Security Group (HOSIG) and CityCo's Business Crime Reduction Partnership.

The Northern Quarter continues to thrive as a night time city centre destination. The area provides a unique and independent bar and restaurant scene. Similarly over the past few years Spinningfields with its stylish restaurants and outdoor socialising space has become a primary evening destination. Following the recent launch of HOME, First Street has begun to establish itself as an evening visitor destination, the increase in the areas popularity will continue as the site is developed further. As additional city centre developments are progressed there will be increased evening activity. Careful management is required to achieve a balance between commercial and residential uses and evening entertainment venues.

Car Parking

With increasing numbers of people both working in and visiting the city, a focus on ensuring good access to the city centre's amenities has and will continue to be a priority.

As outlined in the section on Infrastructure above, there continues to be significant investment in the region's public transport network, to ensure we can provide extensive, reliable services to support our growing, thriving city but also to reduce dependency on the car. However, we also recognise that a proportion of the city centre's workforce and visitors will continue to travel in by car. There are currently in excess of 30,000 off road and 2,000 on street parking spaces available within the city centre to meet this demand, and providing high quality, secure and convenient vehicle parking facilities remains a priority.

A number of surface and multi-storey car parks have been lost to regeneration schemes in recent years, and further losses will result from the redevelopment of other sites such as Aytoun Street Campus, Great Jackson Street and First Street. Additional parking facilities in appropriate proportion to the development proposed are seen as an integral component of creating mixed-use, sustainable developments, and to ensuring new neighbourhoods are attractive to residents, and businesses. As at First Street, for example, we will be looking to bring forward large multi-storey car parks as part of large scale, comprehensive regeneration schemes to ensure there is adequate provision to meet demand.

Further opportunities to meet future parking demand at increased densities include around the edge of city centre, where additional facilities have been provided by, for example, New Bailey car park and at Greengate, on the Manchester-Salford border. By providing facilities at edge of centre locations, a significant number of traffic movements and their wider impact can be removed from within the centre itself. This may, in turn, provide opportunities for environmental enhancements for certain car park sites within the core, pending their redevelopment.

Transport

The section on Transport above, identifies many of the future opportunities to improve transport connections, not just in the city centre but across the city and the region. At present, the North's city regions are poorly connected to each other by transport infrastructure and services, and a long-term programme to transform the quality and capacity of local rail and other public transport commuter systems into the North's major city regions is required.

A new vision for improved transport services across the north – Transport for the North – part of the Northern Powerhouse agenda, is being developed to support major investment in rail and other infrastructure. This will focus on improving east-west connectivity, building on the existing commitments to the Northern Hub and the electrification of the TransPennine line, as well as improvements to the East Coast Main Line to Newcastle. Together with HS2, the transNorth system would transform city to city rail connectivity East/West and North/South, with the aim of connecting all of our major city regions into the future high-speed rail network, and radically reducing travel times. Faster journeys would be delivered by an electrified, high speed east-west railway, capable of speeds up to 140mph in places.

The vision would develop a freight strategy to provide better rail freight connectivity between major Northern ports and freight distribution centres, alongside a network-wide reliability programme across the North's motorway and trunk road system that would resolve strategic bottlenecks in the North. It would also establish a clear long-term investment framework for city and county region transport systems that maximise access to skills and promote sustainable commuting in support of growth and efficiency.

It would establish a programme of surface transport improvements to the North's major airports, including TransNorth links to Manchester Airport, the biggest airport outside the South East, where additional routes to destinations in the world's rapidly growing economies such as China and India, as well as those to the US and Europe, are increasing.

Taken together, these transport innovations and improvements would provide the long-term transport strategy and investment programme that would help transform Northern growth, help rebalance the country's economy and establish the North as a true powerhouse.

The growth in population, in residential and commercial development, and the consequent expansion of the city centre's boundary demands a review of our transport access arrangements and car parking strategies. Proposals on these will be brought forward for public consultation in due course.

8. Delivery

The City Centre Strategic Plan shows that significant expansion and economic growth has occurred within the city centre over the last decade. This development has been achieved amidst a backdrop of recession and a weak economic climate. The plan sets out the city's ambitious development plans within the context of economic, infrastructure and business growth. It also includes the priorities over the next few years, in each city centre neighbourhood, for maintaining momentum to provide further growth and development.

The plan outlines both the private and public sector partnerships formed to ensure the successful delivery of the vision for the city centre.

As described earlier, the City Centre Strategic Plan supports the priorities of the Greater Manchester Combined Authority, as set out in the Greater Manchester Strategy. The Combined Authority provides the governance arrangements for delivering the Greater Manchester Strategy and will be developed further through the recent devolution agreement. We work closely with the Manchester Growth Company to support investment in the city centre, through providing support to businesses, both new businesses and those looking to set up or relocate to the city centre, and encouraging skills development.

Regeneration or Development Frameworks have been put in place for those areas where significant development is taking place – for example NOMA, St John's and First Street. These frameworks guide development work in those areas and are generally delivered through partnership agreements and boards.

In addition to the Manchester Growth Company, we work in partnership with a wide range of organisations and partners in order to deliver the aims and priorities set out within the Strategic Plan, including Cityco, the city centre management company, Transport for Greater Manchester, Greater Manchester Police, Salford City Council, as well as the private sector. The Strategic Plan contributes to the business and delivery plans of those organisations. For example, there is a Business Plan in place to deliver the aims of the Business Improvement District.

9. City Centre Experience

Manchester today is a city known for many things – for its knowledge, its sport, its culture and attitude, its physical assets and its heritage and history. Manchester has always been a city that has sought to exploit its advantages and to develop its contribution into civic infrastructure and values. This tradition

remains strong. Today, we are a city that still faces many challenges, but it is also a city with a reputation for building on our strengths and making opportunities happen. Manchester is shaping and delivering a new economic and social future for its citizens and the wider conurbation and in doing so helping to redefine the UK's competitive performance.

The city centre is a microcosm of these attributes, providing a concentration of employment, residential, cultural and leisure opportunities and facilities to suit all tastes and requirements. The continuing diversification and evolution of the city centre makes it one of the most dynamic centres in the UK. The city has enormous potential to create jobs and economic wealth for the benefit of our residents and the conurbation, at a scale that would have significant impact on the national economy.

We have a clear vision for the future of our city. Our vision is of Manchester as a world class city as competitive as the best international cities. A city:

- That stands out as enterprising, creative and industrious;
- With highly skilled and motivated people;
- With residents living in successful neighbourhoods whose prosperity is environmentally sustainable; and
- Where all our residents can meet their full potential, are valued and secure.

Our vision is being delivered through a strategy that has sought to marshal all of the city's asset bases, not just its economic resources, but also to work towards an even greater build-up of the city's skills and knowledge base, and by facing the challenges in delivering a prosperous and more inclusive future for residents in order to give them the opportunity to share in the wealth being created.

10. Annexes

- Updated city centre map

1. Links to key documents

2. Links to key documents & websites

- The Northern Powerhouse:
One Agenda, One Economy, One North
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/427339/the-northern-powerhouse-tagged.pdf
- Greater Manchester Devolution Agreement
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/369858/Greater_Manchester_Agreement_i.pdf
- Greater Manchester Strategy 2013-2020: Stronger Together

http://www.agma.gov.uk/gmca/gms_2013/index.html

- Draft Manchester Strategy
<http://www.manchester.gov.uk/meetings/meeting/2475/executive>
- Manchester's Community Strategy
http://www.manchesterpartnership.org.uk/manchesterpartnership/downloads/file/45/manchesters_community_strategy
- Salford 2025
http://www.salford.gov.uk/d/Salford_2025_3_year_Action_Plan.pdf
- Draft Manchester Work and Skills Strategy 2015 – 2020
http://www.manchester.gov.uk/meetings/meeting/2391/economy_scrutiny_committee
- NOMA
<http://www.noma53.com/noma-story>
- St John's
http://www.manchester.gov.uk/downloads/download/6157/st_johns_srf
- Spinningfields
<http://alliedlondon.com/item/spinningfields/>
- First Street
http://www.manchester.gov.uk/info/500113/city_centre_regeneration/4948/first_street_framework/2
- Corridor Manchester Strategic Vision 2020
http://www.corridormanchester.com/filestore/corridormanchester/cm-strategic-vision-2020-pdf/original/CM_strategic_vision_2020.pdf
- Former BBC site Oxford Road Strategic Regeneration Framework
http://www.manchester.gov.uk/downloads/download/6169/former_bbc_site_oxford_road_srf_full_report_and_plans
- Manchester Science Park Strategic Regeneration Framework
[http://www.bruntwood.co.uk/Sites/Bruntwood/documents/msp/MSP%20Strategic%20Regeneration%20Framework%20Executive%20Summary%20Version%20\(1\).pdf](http://www.bruntwood.co.uk/Sites/Bruntwood/documents/msp/MSP%20Strategic%20Regeneration%20Framework%20Executive%20Summary%20Version%20(1).pdf)
- Birley Fields
<http://www2.mmu.ac.uk/birley/>
- Civic Quarter Regeneration Framework
http://www.manchester.gov.uk/downloads/download/3584/civic_quarter_-_manchester_central_regeneration_framework
- HS2

<https://www.gov.uk/government/collections/hs2-phase-two-from-the-west-midlands-to-leeds-and-manchester>

- Piccadilly Strategic Regeneration Framework
http://www.manchester.gov.uk/downloads/download/6117/hs2_piccadilly_srf
- Mayfield Strategic Regeneration Framework
http://www.manchester.gov.uk/downloads/download/6118/mayfield_srf
- Great Jackson Street Strategic Regeneration Framework
http://www.manchester.gov.uk/downloads/download/6156/great_jackson_street_srf_march_2015
- Aytoun Street Strategic Framework
http://www.manchester.gov.uk/downloads/download/6167/aytoun_street_strategic_framework_full_report_and_plans_march_2015
- Water Street Strategic Regeneration Framework
http://www.manchester.gov.uk/downloads/download/4306/water_street_framework
- Heart of Manchester BID
<http://cityco.com/heartofmanchester/our-bid/>
- Draft Ancoats & New Islington Neighbourhood Development Framework
<http://www.manchester.gov.uk/meetings/meeting/2153/executive>
- New Cross Development Framework
http://www.manchester.gov.uk/downloads/download/6198/draft_neighbourhood_development_framework_-_new_cross
- Draft Boddingtons Strategic Regeneration Framework
Link to be added
- Draft Manchester Residential Growth Prospectus
<http://www.manchester.gov.uk/meetings/meeting/2032/executive>