



## **Economy Scrutiny Committee**

Date: Thursday, 11 November 2021

Time: 2.00 pm

Venue: Council Chamber, Level 2, Town Hall Extension

This is a **combined agenda pack** containing all published reports

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## **Membership of the Economy Scrutiny Committee**

**Councillors** - H Priest (Chair), Baker-Smith, Bayunu, Doswell, Farrell, Johns, Moore, Noor, Raikes, Stanton and Shilton Godwin

## Agenda

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**1. Urgent Business**

To consider any items which the Chair has agreed to have submitted as urgent.

**2. Appeals**

To consider any appeals from the public against refusal to allow inspection of background documents and/or the inclusion of items in the confidential part of the agenda.

**3. Interests**

To allow Members an opportunity to [a] declare any personal, prejudicial or disclosable pecuniary interests they might have in any items which appear on this agenda; and [b] record any items from which they are precluded from voting as a result of Council Tax/Council rent arrears; [c] the existence and nature of party whipping arrangements in respect of any item to be considered at this meeting. Members with a personal interest should declare that at the start of the item under consideration. If Members also have a prejudicial or disclosable pecuniary interest they must withdraw from the meeting during the consideration of the item.

**4. Minutes**

5 - 12

To approve as a correct record the minutes of the meeting held on 14 October 2021.

**5. Growth & Development Directorate Budget 2022/23**

13 - 32

Report of the Strategic Director Growth & Development

Following the Spending Review announcements and other updates the Council is forecasting an estimated shortfall of £4m in 2022/23, £64m in 2023/24 and £85m by 2024/25. This report sets out the high-level position. Officers have identified options to balance the budget in 2022/23 which are subject to approval.

**6. Contribution of Higher Education institutes to the City's Economy**

33 - 50

Report of the Director of Inclusive Economy and Strategic Lead Policy & Partnerships attached.

This report provides an overview of some of the key economic data that is available to demonstrate the impact Manchester's Universities have on the city's economy. It also includes a number of case studies to highlight specific examples of economic benefit.

**7. Graduate retention and student numbers in the City**

51 - 70

Report of the Director of Inclusive Economy attached

This report provides an overview of the student body studying at

the higher education institutions (HEIs) in Manchester with a specific focus on the two largest institutions: The University of Manchester (UoM) and Manchester Metropolitan University (MMU). It also provides an overview of the numbers of graduates remaining in the city post-graduation and includes the emerging picture of the impact of COVID-19 on the student body, graduate retention and attraction and the local response to support the graduate labour market.

- 8. Economy COVID19 Sit Rep Report** 71 - 94  
Report of the Director of City Centre Growth and Infrastructure and Director of Inclusive Economy

This report provides Committee Members with a further update summary of the current situation in the city in relation to COVID19 and an update on the work progressing in Manchester in relation to areas within the remit of this Committee. Further detail on specific issues will be available as required.

- 9. Overview Report** 95 - 108  
Report of the Governance and Scrutiny Support Unit attached

This report provides the Committee with details of key decisions that fall within the Committee's remit and an update on actions resulting from the Committee's recommendations. The report also includes the Committee's work programme, which the Committee is asked to amend as appropriate and agree.

## Information about the Committee

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The Economy Scrutiny Committee has responsibility for looking at how the city's economy is growing and how Manchester people are benefiting from the growth. .

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## Further Information

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This agenda was issued on **Wednesday, 10 November 2021** by the Governance and Scrutiny Support Unit, Manchester City Council, Level 3, Town Hall Extension , Manchester M60 2LA

## **Economy Scrutiny Committee**

### **Minutes of the meeting held on 14 October 2021**

#### **Present:**

Councillor H Priest (Chair) – in the Chair

Councillors Doswell, Farrell, Johns, Moore, Raikes, Stanton and Shilton Godwin

#### **Also present:**

Councillor Midgley, Executive Member for Health and Care

Councillor White, Executive Member for Housing and Employment

#### **Apologies:**

Councillors Baker-Smith and Noor

### **ESC/21/47 Minutes**

A Member commented that a report that described how the recommendations of the Poverty Truth Commission were being implemented should be included as an item on the Committee's work programme (see ESC/21/42 Manchester's support for families living in poverty).

#### **Decision**

The minutes of the meeting held on 9 September 2021 were approved as a correct record, subject to the above amendment.

### **ESC/21/48 Build Back Fairer – COVID-19 Marmot Review: Housing, Unemployment and Transport**

The Committee considered the report of the Director of Inclusive Economy and Strategic Lead Policy and Partnerships that provides an overview of the Marmot Build Back Fairer report focusing on housing, unemployment and transport in Manchester, in line with the remit of the Committee. The report discussed the impact of COVID-19 on housing, unemployment and transport in the city, relative to health inequalities, and outlined Manchester's response to recommendations in the Build Back Fairer report.

Key points and themes in the report included:

- Providing an introduction and background;
- Describing the impact of COVID-19 in a Manchester context;
- Noting that The Marmot report detailed the disproportionately negative impact that the COVID-19 pandemic has had in Greater Manchester;
- Describing the factors that had affected the inequalities in infection and mortality from COVID-19 in Greater Manchester;

- Noting that Manchester's residents had been disproportionately negatively impacted by the pandemic.
- Describing a range of factors such as Housing, Work and Unemployment, Transport and Active Travel in a Manchester context and describing the associated The Build Back Fairer report summaries; and
- Providing information relating to the Marmot Report Framework and Recommendations and detailing the Manchester's response to these Recommendations.

Some of the key points that arose from the Committee's discussions were: -

- The need to retrofit domestic properties, particularly those in the Private Rented Sector;
- The need to protect tenants from eviction if they did complain about disrepair in their privately rented accommodation;
- The need to promote the Good Employment Charter, noting the impact that good quality employment could have on a person's outcomes;
- The call for improved and affordable public transport to connect residents with employment and training opportunities;
- What metrics and timescales would be used to measure progress against the Marmot Recommendations;
- Noting that the Marmot Review and Recommendations was a tool that could be used to demonstrate to the Government the need for appropriate levels of funding to address the identified inequalities;
- Welcoming the recognition that being in good work was usually protective of health while poor quality work, stressful jobs, and unemployment, particularly long-term unemployment, contribute significantly to poor health and low wellbeing and increase the risk of mortality;
- Consideration needed to be given to all needs of different residents, including disabled residents when considering the re-design of how major areas of the city centre would function and to reallocate space to walking and public realm;
- More information was sought on the Anchor pilot scheme;
- Noting that the NHS was a major employer in the city and a key partner of the Council they should use their procurement policies and scale of purchasing to deliver Social Value; and
- The need for accessible and affordable child care places; especially for those families who were earning just above the threshold for free child care.

The Executive Member for Housing and Employment stated that COVID-19 had highlighted and exacerbated many of the health inequalities that existed in the city. He described that prior to this the city had experienced a sustained period of austerity and cuts to public service funding. He advised that the wider determinants of health, such as quality housing and employment were understood. He called upon the Government for adequate funding to be able to deliver more affordable and social housing. He advocated the need to take action to address poor practice in the Private Rented Sector using Houses in Multiple Occupation and Selective Licensing schemes. He further made

reference to the Section 21 Team who would support those residents at risk of eviction from a private landlord. He concluded by reiterating that the wider determinants of health needed to be addressed such as improved public transport networks and investment in skills and training for residents and he would continue to lobby Government for a fair funding settlement.

The Director of Inclusive Economy advised the Committee that a Task Group would be established to be Chaired by the Director of Public Health to oversee the delivery of the Marmot recommendations. She described that the reporting metrics would be agreed via this group and could be shared with Members when available.

The Director of Inclusive Economy stated that the recently launched Anchors Pilot had a twin focus of supporting Manchester to become a Real Living Wage City and increasing commitment to employing local people, particularly from our more disadvantaged communities. This would further support the implementation of the Good Employment Charter and any future evolving definition of a GM quality of work guarantee. In response to a comment regarding those areas of the city that did not have a major employer she described that they would be working for the city as a whole and not just the geographical location then were situated in, adding that in North Manchester there existed a North Manchester Business Network with good links between local smaller business and community initiatives.

The Director of Inclusive Economy acknowledged the comments regarding the NHS and the role they played in the city as a major employer. She stated that officers had spoken with their procurement teams however stated it was important to recognise that the NHS was subject to national procurement policies and guidance so had little local discretion on such matters. She advised that the local hospitals had initiated schemes and programmes to deliver training and employment opportunities for local residents.

The City Centre Growth Manager advised that work continued at a Greater Manchester (GM) level to improve public transport, especially the bus network and made reference to the Bus Service Improvement Plan, adding that the ability to franchise the bus network would present an opportunity to address the issue of fares and deliver a planned integrated service. The Chair commented that there was need to report any analysis of changes to modes of transport and travel, noting the impact of COVID-19 and emissions.

The Director of Inclusive Economy acknowledged the comment regarding the need for appropriate, affordable child care and stated that this provision is reported to the Children and Young People Scrutiny Committee. The Chair stated that she would discuss this further with the Chair of that Committee.

## **Decision**

The Committee:-

- (1) Recommends that the Executive Member for Housing and Employment lobby the Government for adequate funding to enable the retrofitting of properties in the Private Rented Sector.
- (2) Notes that the Chair will discuss with the Chair of the Children and Young People Scrutiny Committee the issue of appropriate provision of affordable child care across the city.

### **ESC/21/49 Work and Health**

The Committee considered the report of the Director of Inclusive Economy that provided an update on the activity of the most recent Working Well programmes (Work & Health, Early Help and JETS) and the impact of the programme overall in Manchester.

Working Well is a well-established Greater Manchester Combined Authority commissioned programme which is based on a key worker model bringing together support to tackle barriers that affect people's ability to enter the labour market and sustain jobs. It has evolved since 2014 to reflect a focus on different target groups, with the latest being the Work and Health programme. In 2020 it was expanded with the JETS programme as part of the National Plan for Jobs in response to COVID19.

Key points and themes in the report included:

- Providing and introduction and background;
- Describing the content of the report in a Health and policy context;
- Describing the Manchester Population Health Plan 2018-2027 that set out a priority of 'Strengthening the positive impact of work on health';
- An overview of each Working Well programme and its impact in Manchester;
- Economic recovery and the Government's Plans for Jobs; and
- Conclusions and next steps.

Some of the key points that arose from the Committee's discussions were: -

- Noting the positive progress made in relation the Real Living Wage;
- An explanation was sought as to the reason the 'no work requirements group' continued to rise from c10,000 to c17,000;
- Comparative figures were sought, where available across the range of metrics reported as this would assist with the scrutiny process;
- Clarification was sought as to the type of jobs and sectors people were accessing through the initiatives;
- An analysis of the success of the Kickstart programme should be included on the Committee's work programme;
- Was the reported support for 8,000+ Manchester residents over the next 3 years as part of the Restart programme an ambition or part of the contract with Ingeus;
- The need to recognise the importance of the quality of jobs people were accessing and this importance this had on people and their outcomes;



- The need for programmes to be flexible to respond to the changing needs and demands of the labour market;
- Supporting the adoption of the Real Living Wage;
- The need to consider what was best for the individual and not focus on targets and welcoming the reported holistic approach taken by advisors;
- Calling for more regional control on the design and delivery of skills programmes;
- Requesting the independent evaluation of the Population Health Prevention Programme be shared with Members when this was available;
- Noting that people were often reluctant to engage with the benefit service due to the perceptions that any reassessment of their benefits would result in them being financially worse off or having to commence the claiming of benefits again;
- An update on the UK Shared Prosperity Fund (UKSPF) was sought, noting the importance of the for both Manchester and the wider city region;
- Welcoming the Working Well programme that had helped drive Disability Support Webinars with Small, Medium enterprises (SMEs) by offering to upskill businesses to deal with a variety of health conditions;

The Executive Member for Health and Care stated that health inequalities were inextricably linked to the wider determinants of health. She stated that the city region needed appropriate funding to support the actions identified to address these inequalities and to counter the significant impact that austerity has had on the residents of the city. She advocated that addressing health inequalities should be the central consideration to all decision making.

The Work and Skills Lead commented that the reported rise from c10,000 to c17,000 in the 'no work requirements group' could be attributed to the recording of data by the DWP following conversations with residents, however he advised that he would seek clarification on this point. He advised that Job Centre Plus staff were encouraged to engage in holistic conversation to ensure potential job opportunities were appropriate and sustainable, taking into account a range of considerations that included travel requirements.

The Work and Skills Lead advised that the figures reported for the Restart programme were part of the contract arrangements.

The Work and Skills Lead advised that comparative data where available could be shared with the Committee, and he further advised that the type of work people were accessing through these programmes were predominantly in the Care and Customer Service sectors. He further commented that the roles of the key workers was to review all options that were available, including understanding the changing labour market to ensure the most appropriate and tailored support was provided and identify and address any barriers to accessing employment opportunities. A member noted the need to acknowledge people's genuine concerns regarding accessing jobs in certain sectors, in particular the care sector if they themselves had a health issue due to the perceived increased risks of contracting COVID-19.

The Director of Inclusive Economy commented that a report on the impact of Kickstart, a programme delivered locally by Jobcentre Plus, offers 6 month jobs for young people aged 16-24 who are currently claiming Universal Credit and who are at risk of long term unemployment could be provided to the Committee at an appropriate time, adding that initial analysis indicated that the outcomes were not as good as had been anticipated, despite the impact of the pandemic and this strengthened the case for more local control over the design and delivery of schemes.

The Director of Inclusive Economy stated that further information in the business that had delivered the Disability Support Webinars would be provided to the Members following the meeting. She stated this importance of this approach was recognised and commented that a report issued by the British Chamber of Commerce had recently published a report that emphasised the need to consider the health and wellbeing of employees.

The Director of Inclusive Economy acknowledged the comments made regarding the barriers presented by perceptions of the benefits system by stating that Universal Credit is more flexible than previous systems and it was designed to be an 'in work' benefit, however acknowledged the comment from the Chair on this subject.

The Chair commented that she would discuss with the Chair of the Health Scrutiny Committee how the reporting of the independent evaluation of the Population Health Prevention Programme could be appropriately reported to scrutiny.

## **Decision**

The Committee:-

- (1) Recommends that the Director of Inclusive Economy circulate for information the details of organisations who had delivered the Disability Support Webinars;
- (2) Request that a report on the impact and outcomes of the Kickstart programme be added to the Committee's work programme for consideration at an appropriate time;
- (3) Note that the Chair will discuss with the Chair of the Health Scrutiny Committee the options for reporting the findings of the independent evaluation of the Population Health Prevention Programme

## **ESC/21/50 Opportunities and issues for older workers in the Labour Market**

The Committee considered the report of the Director of Inclusive Economy and Consultant in Public Health (Ageing Well Lead) that provided data on the employment and skills status of workers (aged 50 to 64) in Manchester, how they had been impacted by Covid and the actions being taken to connect them to opportunities in the City as part of the Economic Recovery Strategy.

Key points and themes in the report included:

- Providing an introduction and context, noting that older workers who are out of work are twice as likely to be long-term unemployed as younger workers who are out of work;
- Describing the situation for Older Workers in Manchester;
- Data on Employment and Skills for those residents aged over 50 years old;
- Data on the levels of Universal Credit claimants for those residents aged over 50 years old;
- Describing the Impact of COVID-19 on employment;
- Challenges and issues, including the digital divide and the digital inclusion work underway to address this;
- Information on Age Friendly Manchester (AFM) and Manchester's Ageing Strategy - Manchester: A Great Place to Grow Older 2017 – 2021;
- Programmes and work being delivered across Manchester Age Friendly Employment; and
- Conclusions.

Some of the key points that arose from the Committee's discussions were: -

- The need to give due consideration when describing digital skills when discussing the over 50's as the range of knowledge and experience could differ greatly;
- Noting that it was socio economic barriers that presented the largest challenge to many older residents;
- The need to recognise that over 50's had a wealth of other experiences that they could bring to the work place;
- Noting the need for employers to recognise and accommodate the different life pressures experienced by older workers;
- People should be supported and encouraged to prepare a CV rather than having to rely solely on submitting job applications on-line;
- Welcoming the reported co-creation activities, adding that this approach of utilising and learning from lived experience should be applied to all services and programmes and would there be any evaluation of this undertaken;
- Had consideration been given as to the impact of Long Covid

The Director of Inclusive Economy acknowledged the comment made regarding the need to recognise the different needs and challenges for people over the age of 50, and the different existing skills sets within this cohort. She commented that in Manchester the digital inclusion work had targeted over 65s.

In response to the comment made regarding CV's the Director of Inclusive Economy commented that Manchester City Council had changed its policy and would now accept a CV and covering letter, however acknowledged the wider point on this issue. She further stated that a report on the outcomes of the co-creation activities would be submitted to the Committee at an appropriate time for consideration. In response to the

issue regarding Long Covid and its impact on the over 50s she advised that no specific data was currently available however this would continue to be monitored.

The Programme Lead – Age Friendly Manchester welcomed the comment made regarding changing caring responsibilities and stressed the importance of employers recognising these. He stated that Manchester Council had responded by introducing a flexible working policy and there was a need to engage with the private sector to demonstrate the benefits to both employers and employees by introducing such schemes.

### **Decision**

The Committee recommend that an evaluation report on the co-creation activities relating to the Over 50's and Employment Project be submitted for consideration at an appropriate time.

### **ESC/21/51 Overview Report**

The report of the Governance and Scrutiny Support Unit which contained key decisions within the Committee's remit and responses to previous recommendations was submitted for comment. Members were also invited to agree the Committee's future work programme.

In response to a question from the Member the Chair commented that the COVID-19 Situation Report would be included as a regular item on future agendas and that the Economy Dashboard would also be included at the appropriate time.

### **Decision**

The Committee note the report and agree the work programme, noting the comments above.

## Manchester City Council Report for Information

**Report to:** Economy Scrutiny Committee – 11 November 2021

**Subject:** Growth & Development Directorate Budget 2022/23

**Report of:** Strategic Director Growth & Development

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### Purpose of Report

Following the Spending Review announcements and other updates the Council is forecasting an estimated shortfall of £4m in 2022/23, £64m in 2023/24 and £85m by 2024/25. This report sets out the high-level position. Officers have identified options to balance the budget in 2022/23 which are subject to approval.

The position will be clearer in December 2021 when the Local Government Finance Settlement is received although that is unlikely to provide detailed funding allocations for after 2022/23. A longer-term strategy to close the budget gap is being prepared with an estimated requirement to find budget cuts and savings in the region of £40m per annum for 2023/24 and 2024/25. In addition, £50.6m of risk-based reserves have been identified as available to manage risk and timing differences

Appended are the priorities for the services in the remit of this committee, details on the initial revenue budget changes proposed by officers and the planned capital programme.

### Recommendations

The committee is recommended to:

1. Note the forecast medium term revenue budget position.
  2. Consider the content of this report and comment on the proposed changes which are relevant to the remit of this scrutiny committee.
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### Wards Affected: All

<b>Environmental Impact Assessment</b> - the impact of the issues addressed in this report on achieving the zero-carbon target for the city
The budget reflects the fact that the Council has declared a climate emergency by making carbon reduction a key consideration in the Council's planning and budget proposals.

<b>Manchester Strategy Outcomes</b>	<b>Summary of the Contribution to the Strategy</b>
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	Providing the leadership and focus for the sustainable growth and transformation of the City Centre and our neighbourhoods and highways
A highly skilled city: world class and home-grown talent sustaining the city's economic success	Ensuring residents are connected to education and employment opportunities across the City.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	Creating places where residents actively demonstrate the principles of Our Manchester unlocking the potential of our communities through participation and take responsibility for themselves and their community whilst encouraging others to do the same, supported by strong and active community groups.
A liveable and low carbon city: a destination of choice to live, visit, work	Creating places where people want to live with good quality housing of different tenures and effective use of the highways network; clean, green, safe, healthy, and inclusive neighbourhoods; a good social, economic, cultural offer and environmental infrastructure.
A connected city: world class infrastructure and connectivity to drive growth	Ensuring residents, neighbourhoods, businesses, and goods connect to local, national, and international markets. Through working with partners both internally and externally maximise the impact of the provision of new and enhanced physical and digital infrastructure.

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

- Equal Opportunities
- Risk Management
- Legal Considerations

### **Financial Consequences Revenue**

The changes included within this report are officer proposals and, subject to Member comments and consultation, these will be included as part of the 2022/23 budget preparation.

### **Financial Consequences – Capital**

None directly arising from this report.

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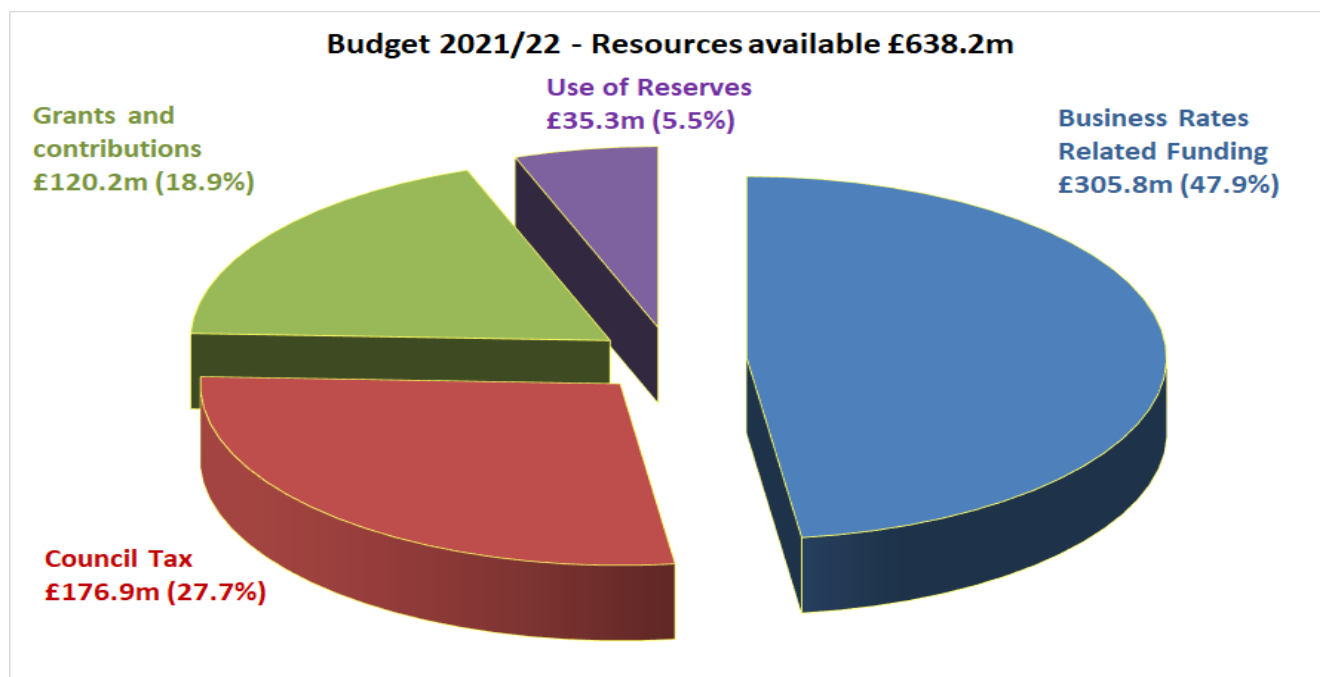
**Background documents (available for public inspection):**

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. If you would like a copy, please contact one of the contact officers above.

Growth and Development Directorate Budget Report 2021/22 – Executive 17<sup>th</sup> February 2021

## 1. Context and Background

- 1.1. On 27 October 2021, the Chancellor of the Exchequer, Rishi Sunak MP, delivered the Spending Review and Autumn budget 2021 to the House of Commons. The Spending Review sets the quantum of funding available for local government whilst the Finance Settlement (expected in December) sets out the distribution to individual local authorities.
- 1.2. The medium-term financial plan remains challenged by uncertainty. There are potential changes to how local government funding is distributed, the Business Rates Retention scheme, and Adult Social Care Reform and associated funding.
- 1.3. The Council's 2021/22 net revenue budget is currently funded from four main sources which are Council Tax, Business Rates, government grants and contributions and use of reserves. In recent years as central government funding has reduced and business rates retention has been introduced the ability to grow and maintain the resources raised locally has become even more important for financial sustainability and is integral to the Council's financial planning.
- 1.4. The following chart shows the current breakdown of resources available.



## 2. Current budget position

- 2.1. The indicative medium-term position is shown in the table below, full details are provided in the Spending Review and budget update report to Resources and Governance scrutiny committee 9 November 2021.



	Approved 2021 / 22 £'000	2022 / 23 £'000	2023 / 24 £'000	2024 / 25 £'000
<b>Resources Available</b>				
Business Rates Related Funding	156,416	318,969	315,557	333,520
Council Tax	176,857	205,528	204,116	214,567
Grants and other External Funding	120,243	83,040	76,957	74,957
Use of Reserves	184,667	49,857	22,737	7,573
<b>Total Resources Available</b>	<b>638,183</b>	<b>657,394</b>	<b>619,367</b>	<b>630,617</b>
<b>Resources Required</b>				
<i>Corporate Costs</i>	121,096	112,156	113,378	118,016
<i>Directorate Costs</i>	517,087	549,766	569,732	598,099
<b>Total Resources Required</b>	<b>638,183</b>	<b>661,922</b>	<b>683,110</b>	<b>716,115</b>
<b>Shortfall / (surplus)</b>	<b>0</b>	<b>4,528</b>	<b>63,743</b>	<b>85,498</b>

- 2.2. The budget assumptions that underpin 2022/23 to 2025/26 include the commitments made as part of the 2021/22 budget process to fund ongoing demand pressures as well as provision to meet other known pressures such as inflation and any pay awards (estimated at 3% from 2022/23). Whilst this contributes to the scale of the budget gap it is important that a realistic budget is set which adequately reflects ongoing cost and demand pressures.
- 2.3. Officers have identified options to balance the budget in 2022/23 which are subject to approval. The detail relevant to this scrutiny remit is included at Appendix 2. If these proposals are supported a balanced budget will be achieved. In addition, £50.6m of risk-based reserves have been identified as available to manage risk and timing differences.

### **3. Scrutiny of the draft budget proposals and budget reports**

- 3.1. The service budget position is attached for the Committee's consideration. The reports have been tailored to the remit of each scrutiny as shown in the table below. This Committee is invited to consider the proposed changes which are within its remit and to make recommendations to the Executive before it agrees the final budget proposals in February 2022.

Date	Meeting	Services Included
9 Nov 21	Resources and Governance Scrutiny Committee	Chief Exec Corporate Services Revenue and Benefits / Customer and Welfare Support Business Units
9 Nov 21	Communities and Equalities Scrutiny Committee	Sport, Leisure, Events Libraries Galleries and Culture Compliance and Community Safety Housing Operations including Homelessness Neighbourhood teams
10 Nov 21	Health Scrutiny Committee	Adult Social Care and Population Health
10 Nov 21	Children and Young People Scrutiny Committee	Children and Education Services
11 Nov 21	Environment and Climate Change Scrutiny Committee	Waste and Recycling Parks Ground's maintenance
11 Nov 21	Economy Scrutiny Committee	City Centre Regeneration Strategic Development Housing and residential growth Planning, Building Control and licensing Investment Estate Work and skills Highways

#### 4. **Next Steps**

4.1. The proposed next steps are as follows:

- The Local Government Finance Settlement is expected mid to late December. The outcome will be reported back to January Resources and Governance Scrutiny Committee (11 January) and Executive (19 January) along with an update on the budget position.
- February Scrutiny Committees (8-10 February) and Executive (16 February) receive proposed budget.
- Resources and Governance Budget Scrutiny – 28 February.
- March Council - approval of 2022/23 budget - 4 March.
- New Municipal Year – early options around 2023/24 & 2024/25 discussed with members.

## **Appendix 1 – Headline priorities for the service**

The Growth and Development Directorate has a pivotal role in driving the sustainable economic growth of the city to benefit everyone. This is achieved through securing new commercial development, attracting inward investment, generating employment growth across the city, connecting residents to those opportunities, and supporting businesses and communities to thrive. The directorate continues to play a leading role in the economic recovery of the city following the decline due to Covid-19.

### **Investment Estate**

The Investment Estate service, which is managed by the Development Team, covers all aspects of the Council's non-operational property estate. This includes property and land held for investment purposes, surplus land, and development assets. The team is also responsible for the undertaking of statutory functions including asset valuations for accounting purposes and undertaking planning viability assessment reviews.

### **Priorities Include**

- Managing the Council's Investment estate to provide a long-term sustainable income stream to the Council and reducing costs and liabilities arising from repairs, property management, voids and bad debt.
- Identify opportunities that exist to drive additional revenue and capital receipts from the Council's asset base through review of assets.
- Ensure high quality and timely asset valuations to support financial reporting requirements.
- Promoting and delivering a strategic asset management plan to assist in decision making around the Council's real estate portfolio.
- Support the Council's zero carbon targets through leveraging better outcomes from development on Council land, or where the Team has influence over development.
- Working with colleagues on preparation of levelling up fund bids.
- Driving release of land in East Manchester to support delivery of new commercial development.
- Supporting the Council's housing delivery targets through land sales and lease regears driving delivery of a sustainable tenure mix across the City.
- Working with colleagues across the Council to deliver Major Development Projects in Victoria North, Eastern Gateway, and City Centre.
- Securing the delivery of appropriate planning obligations, including affordable housing, on behalf of Planning Service through s106 and other routes.

### **City Centre Growth & Infrastructure**

The City Centre Growth & Infrastructure Team provides the essential focus and drive in the delivery of a wide range of initiatives that support inclusive growth, regeneration, and future planning across the city, with a particular responsibility for the city centre.

**Priorities include:**

- Working collaboratively with a range of partners, facilitating the delivery of major growth and regeneration schemes, increasing the Council Tax and Business Rates base; and developing planning, infrastructure, and environmental policy to drive growth across the city.
- Encouraging new inward investment to the city, facilitating the creation of new jobs.
- Aligning development and infrastructure policy, plans and investment programmes to ensure that they deliver on Manchester's strategic policy objectives, and attract funding and investment opportunities for the city.
- Aligning growth and infrastructure objectives to support delivery of the city's Climate Change Action Plan and related policies.
- Developing Manchester's Local Plan in consultation with all communities across the city ensuring this informs policy development, and Places for Everyone with GM Partners, ensuring alignment with the Local Plan.
- Working with a range of Council services, external organisations, and agencies to support place management and to ensure the holistic and effective management of the city centre, including the public realm.
- Leading the city's subsequent economic recovery strategy, following the Covid-19 pandemic, to support future growth.
- Leading transport infrastructure development, including public transport investment, active travel projects and the development of overarching transport strategies, including the City Centre Transport Strategy.

**Housing & Residential Growth**

The service's mission is "to ensure that there is a sufficient mix of well-managed and good quality housing to meet the needs of a growing city and to set the policy framework to ensure that all Manchester residents can live comfortably and safely." Linked to the mission there are two key objectives, namely.

- Support delivery of significant new housing in the city, including through
- and effective recovery from COVID-19.
- Ensure inclusive access to housing by the provision of enough safe, secure, and affordable homes for those on low and average incomes. This includes strategically joining up provision, and the improved service to residents enabled by the direct control of Council owned housing in the north of the city.

**Priorities Include:**

- The continued delivery of affordable homes, with a target of 6,400 homes to be achieved between 2015 and 2025 – to date over 2,000 new homes have been delivered and we are on schedule to exceed the target by 2025;

- Progress seven new Extra Care schemes – this is on schedule with three new schemes completed in the past year in Brunswick, Gorton, and Whalley Range, respectively.
- Delivery of Phase 1 of Victoria North (1,000 new homes including 130 Council homes in Collyhurst);
- Implement initiatives to progress the enabling works funded via £51.6m of Housing Infrastructure Funding to help deliver the Victoria North JV Partnership.
- Commencement of the next phase of the Manchester Life JV in the Eastern Gateway.
- Lead the Council's drive for Fire Safety improvements, especially in high-rise buildings - over 1,000 sprinkler installations have been carried out to date.
- Management of three PFI (Private Finance Initiative) Contracts in Miles Platting, Brunswick, and Grove Village.
- Establishing a viable Housing Delivery Vehicle through This City – enabling delivery of up to 500 new homes per year at an accessible rent.
- Developing a new Housing Strategy for the city.

The service plays a key role in supporting the Council's equality objectives and Tackling diversity and inclusion, evidenced by the following actions.

- Ensuring that the Council's Allocation Scheme is open and transparent.
  - Ensuring that specific groups are catered for in housing delivery, for example:
    - Older people with care needs through accessing extra care accommodation.
    - Accommodation for people with Learning Disabilities.
    - Looked After Children via the House Project, and
    - LGBT+ Community via the country's first LGBT Extra Care which is soon to be developed.

## **Planning, Building Control & Licensing**

Planning, Building Control and Licensing service works within an ever-changing environment of national policy documents, regulations, and legal considerations which has seen additional demands placed on the service where the scale of development and the pressure on supporting compliance is already significant.

Crucially, the service plays a central role in delivering the Council's sustainable growth agenda, promoting positive outcomes for the city, and helping to de-risk investment decisions into the city. This is about securing new development that strengthens the platform for attracting investment to deliver economic growth, the aims of the residential growth strategy and supporting an uplift in the environment that is safe, inclusive and responds to climate change. The remit of the service includes delivering all the statutory functions of the city council as local planning authority – over 4,000 planning applications per annum, appeals, heritage matters and compliance, the local authority

building control function, including building and fire safety, dangerous buildings and safety at sports grounds and the licensing function, both premises and taxis. Each part of the service is required to develop strong networks internally and externally along with the ability to forge effective partnerships with external Agencies and to influence the private sector and other key stakeholders to deliver key council objectives through major projects and policy development.

### **Priorities Include**

- With the City Centre and Infrastructure Team develop the Local Plan for Manchester and other supporting planning policies to deliver the city councils objectives
- Through the planning process drive outcomes that support Manchester's sustainable growth ambition, new jobs, new homes responding to a clear quality and climate change agenda
- With Housing and Residential Growth, ensure our teams, particularly Building Control, are fully aligned to and capable of meeting the emerging mandatory changes being delivered through both the Building Safety and Fire Safety Acts.
- Leading the work on minimum licensing standards across GM for developing a world class taxi and private hire fleet
- Developing new Licensing Policy and Gambling Policy that responds to the needs of the city and are aligned to the Councils corporate objectives
- Continue to ensure the statutory functions of the Council meet all national performance targets and legal requirements to avoid the risk of Government intervention and challenge

### **Work & Skills**

The Work & Skills team is responsible for the development and delivery of the Work & Skills Strategy for the City and the skills and labour market aspects of the City's economic recovery plan. It provides a coordinated approach to the post-16 & adult skills and employment support offer across the city, to ensure that the offer is as coherent as possible for young people and adults and meets the city's labour market requirements. The team engages with businesses on business growth, skills & employment opportunities and supports business networks across the city.

### **Priorities Include**

- Refresh of the Work & Skills Strategy
- Continuing to deliver the skills & labour market aspects of the Economic Recovery Plan
- Work with key sectors, companies and providers to meet areas of skill shortages in growth sectors and the foundational economy e.g. care, hospitality, construction
- Deliver the employment & skills aspects of social value with a focus on North Manchester

- Lead the delivery of the refreshed Family Poverty Strategy and the work with anchor institutions
- Digital strategy, skills and digital inclusion

## **MAES**

MAES provides adult education, learning and skills from 7 adult education centres across the city. It is focused on providing opportunities for residents with lower levels of skills & qualifications, with on average over 70% of learners on working age benefits and 80% from the City's most disadvantaged areas. Much of the skills curriculum offer is focused on ESOL (English for Speakers of Other Languages), Maths and English & Digital from entry level to GCSE with a vocational offer mainly to Level 2 in childcare and care. There are good progression routes to employment and progression to further learning. The MAES core offer is complemented by enhanced employability support available to all learners through its Make It Happen programme.

Demand for ESOL in particular is very high and MAES runs the ESOL advice service to ensure that residents in the city can access ESOL learning that best fits their needs across MAES, the Manchester College and VCSE organisations. In addition, MAES runs the award-winning Talk English programme targeted at providing opportunities for ESOL speakers and migrants to acquire English language skills in community settings. MAES also commissions community learning from VCSE organisations across the city to extend the reach into the City's communities and engage residents who are not ready /would be reluctant to enrol in MAES centres.

MAES generates all its funding externally, mostly through the GMCA (Greater Manchester Combined Authority) commissioned AEB budget. In addition, it receives ESFA (Education and Skills Funding Agency) funding for 16- to 24-year-old SEND (Special Education Needs and Disabilities) (Special EducMHCLG (Ministry of Housing Communities and Local Government) Needs and Disabilities) learners and MHCLG (Ministry of Housing Communities and Local Government) (Ministry of Housing Communities and Local Government) funding for the Talk English programme. Covid has impacted on MAES funding and delivery.

### **Priorities include:**

- Delivery of the MAES review recommendations to bring expenditure in line with income
- Support learners to return to centres and achieve their qualifications post-Covid and use the experience of online learning to create a blended offer that is flexible and meets student needs
- Contribute to the skills and labour market recovery work by providing upskilling to enable more residents to connect /re-connect to the labour market
- Expand / flex ESOL provision to meet demand including the delivery of ESOL to newly arrived Afghan refugees and the continuation of the ESOL advice and Talk English programmes

- Develop options to improve the quality of MAES centres in need of refurbishment/investment and contribute to the development of the Gorton Hub
- Extend the reach of MAES into Manchester's disadvantaged communities both directly and working in partnership with the VCSE sector.



## **Appendix 2 – Indicative Revenue Budget**

### **Growth and Development Revenue Budget Strategy**

The Growth and Development Directorate has a gross budget of £40.3m and a net credit budget of £8.943m with 427.6 fte's. The breakdown by service area is provided in the table below:

#### **Base budget 2021/22**

<b>Service Area</b>	<b>2021/22 Gross Budget £'000</b>	<b>2021/22 Net Budget £'000</b>	<b>2021/22 Budgeted Posts (FTE)</b>
Investment Estate	8,595	(12,730)	28.8
Manchester Creative Digital Assets	1,172	250	-
Growth & Development	364	164	2.6
City Centre Regeneration	3,249	1,275	25.8
Housing & Residential Growth	3,419	1,155	34.9
Planning, Building Control & Licensing	7,430	(680)	122.1
Work & Skills	2,177	1,623	25.6
MAES	9,946	0	182.0
Our Town Hall Project	2,385	0	5.8
<b>Total</b>	<b>38,737</b>	<b>(8,943)</b>	<b>427.6</b>

The 2021/22 Growth & Development cash limit budget is income of £8.943m, and this is net of £1.108m savings that were approved as part of the 2021/22 budget process. In addition, Highways services fall under the remit of this scrutiny panel and details of the Highways revenue budget and capital investment is set out at Appendix 4

### **Changes to the 2022/23 Budget**

#### **2022/23 Approved Savings**

In addition to the £1.108m savings that were approved as part of the 2021/22 budget process, there are no further savings for 2022/23 although there are a further £300k of investment estate savings approved for 2023/24. This is to be delivered through establishing a new ground rental portfolio secured against long leasehold disposal of land as part of the Victoria North development.

MAES is funded through external Government grants and following a change in the funding regime the approved funding is not sufficient to meet the existing costs of the service. To ensure the service is sustainable and reduce the requirement to use

reserves a service redesign is underway and this involves several staff reductions that are being managed through a scheme of voluntary severance. Several staff have already left in 2021/22 and further staff reductions are planned for 2022/23 to ensure a balanced budget.

### **New Proposed Changes 2022/23**

As part of the 2021/22 budget process £393k savings were approved in respect of holding/deleting 11 posts in planning and building control. The redesign is almost complete and expected to be implemented from January 2022. To allow for service delivery, and succession planning savings realised are around £200k. This will require alternative savings of £193k to be delivered in 2022/23 and officers are currently developing options for consideration as part of the 2022/23 budget.

Provision has been made for inflationary price increases and potential pay awards. This is held centrally and will be allocated to service budgets when the details are available.

### **Appendix 3 – Capital budget and pipeline priorities**

The current approved capital programme, as at period 6 in 2021/22, is shown below alongside the funding to be used. Details on potential future investment opportunities are also shown, but these remain subject to approval.

#### **Approved Capital Programme**

<b>Service Area</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Strategic Housing - Disabled Facilities Grant	7,500	8,079	-	-	15,579
Strategic Housing - Other	7,231	7,217	12,662	2,725	29,835
Northern Gateway	19,391	27,255	26,272	-	72,918
Eastern Gateway	7,662	3,024	-	-	10,686
City Centre	8,027	3,383	-	-	11,410
Other	4,866	8,643	-	-	13,509
<b>Total</b>	<b>54,677</b>	<b>57,601</b>	<b>38,934</b>	<b>2,725</b>	<b>153,937</b>

#### **Funding of Approved Capital Programme**

<b>Service Area</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Grant	25,733	30,299	18,352	-	74,384
External contributions	1,544	2,350	-	-	3,894
Revenue Contribution to Capital	4,191	756	799	-	5,746
Capital Receipts	2,663	3,774	10,959	2,725	20,121
Borrowing	20,546	20,422	8,824	-	49,792
<b>Total</b>	<b>54,677</b>	<b>57,601</b>	<b>38,934</b>	<b>2,725</b>	<b>153,937</b>

#### **Future Investment Priorities**

The following projects are potential future investment opportunities, which may be brought forward in the future:

- Investment in key strategic areas, including the Ancoats Mobility Hub and Wythenshawe Town Centre, alongside works in the Eastern and Northern Gateways.
- Public realm works, including Piccadilly Gardens.
- Further investment in the Council's digital asset base.

- The Culture in the City Levelling Up bid, supporting development at HOME and at Campfield.
- Investment in This City, developing new homes in the city.

## APPENDIX 4 – HIGHWAYS

### Highways Service

The Highways Service works to improve the city's road networks and public spaces, delivering a range of work that keeps traffic flowing, maintains the public realm and designs major new highways schemes to benefit residents and visitors in Manchester.

The Highways Service is made up of several teams:

- Network Management - keeping the city moving, managing parking, traffic, and other aspects of road safety.
- Design, Commissioning and Project Management Team (PMO) - managing and developing our highways.
- Public Realm - maintaining monuments, water features and more

### Priorities:

- Keeping highway users safe
- Reducing congestion and supporting business and economic recovery
- Supporting active travel options of walking and cycling
- Delivering a programme of highway improvements

### Revenue Budget.

Highways service revenue budget is part of the overall Neighbourhoods service budget. The service has a gross £25.1m and net £17.5m budget with 232 fte's.

Service Area	2021/22 Gross Budget £000's	2021/22 Net Budget £000's	FTE's
Highways Development	43	43	3
Network Management	4,937	2,042	94
Public Realm	687	658	5
Design, Commissioning & PMO	(221)	(239)	56
Highways Maintenance	6,210	5,629	74
Accident & Trips	1,164	1,164	0
Street Lighting	11,421	8,269	0
Metroshuttle Contribution	900	0	0
<b>Highways Total</b>	<b>25,141</b>	<b>17,566</b>	<b>232</b>

The highways budget is net of £495k 2021/22 savings that were approved as part of the budget process, and there are another £150k savings approved for 2022/23, that are to be achieved through a further reduction in the accidents and trips budget.

### **New Proposed Changes**

As part of the work to review the budget the following budget pressure has been identified and this will need to be considered as part of the budget process.

- Winter Services - £200k increased costs of service provision

### **Highways Capital Programme**

The current approved capital programme, as at period 6 in 2021/22, is shown below alongside the funding to be used. Details on potential future investment opportunities are also shown, but these remain subject to approval.

#### **Highways Approved Capital Programme**

<b>Service Area</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Maintenance Programme	26,319	8,603	2,233	-	37,155
Mayor's Challenge Fund schemes	12,102	16,191	-	-	28,293
Other	9,584	10,036	-	-	19,620
<b>Total</b>	<b>48,005</b>	<b>34,830</b>	<b>2,233</b>	<b>0</b>	<b>85,068</b>

#### **Funding of Approved Capital Programme**

<b>Service Area</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>	<b>Total</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Grant	200	-	-	-	200
External contributions	23,836	21,294	-	-	45,130
Revenue Contribution to Capital	857	-	-	-	857
Capital Receipts	308	681	-	-	989
Borrowing	22,804	12,855	2,233	-	37,892
<b>Total</b>	<b>48,005</b>	<b>34,830</b>	<b>2,233</b>	<b>-</b>	<b>85,068</b>

### **Future Investment Priorities**

The following projects are potential future investment opportunities, which may be brought forward in the future:

- A further investment plan for highway and footways maintenance, improvements, and road safety, as the existing programme comes to an end. This would complement existing government funding.

- The opportunities to bid for Mayor's Challenge Fund from the GMCA will be continually reviewed to fund road, footway and cycleway improvements.
- Ongoing review of accident prevention and local community safety measures, £2m was included in the programme for 2021/22 and any unused resources will be carried forward into 2022/23

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## Manchester City Council Report for Information

**Report to:** Economy Scrutiny Committee – 11 November 2021

**Subject:** Contribution of Higher Education Institutes to Manchester's economy

**Report of:** Director of Inclusive Economy and Strategic Lead Policy & Partnerships

### Summary

This report provides an overview of the economic contribution of Manchester's two main universities, The University of Manchester and Manchester Metropolitan University. The report utilises research by Public First which was undertaken in 2020 using data from 2018/19 which quantified the direct value created by the universities, their wider supply chain and procurement spending with local businesses, and the additional spending of their staff, students and visitors. It also draws on Research England's new Knowledge Exchange Framework (KEF) and Higher Education Statistics Agency (HESA) data. Both universities signed the Greater Manchester Civic University Agreement on 24 September 2021 during the Greater Manchester Combined Authority meeting and are committed to delivering positive outcomes for Manchester and the city region.

### Recommendations

It is recommended that the Committee consider and comment on the content of the report including the detailed case studies.

### Wards Affected: All

<p><b>Environmental Impact Assessment</b> - the impact of the issues addressed in this report on achieving the zero-carbon target for the city</p>
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<p>Both universities are members of the Manchester Climate Change Partnership and are signed up to the city's zero carbon 2038 ambitions, which were calculated through The University of Manchester's Tyndall Centre for Climate Change. They have climate change action plans in place and are also part of the Oxford Road Corridor Zero Carbon Subgroup. They also undertake extensive research to support the city to decarbonise.</p>
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Our Manchester Strategy outcomes	Summary of how this report aligns to the OMS
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	The universities are anchor institutions who employ significant numbers of workers in a broad range of academic and non-academic roles. They spend large amounts of money through their supply chains, attract research and development investment, and also play a major role in promoting the city on a global stage.
A highly skilled city: world class and home-grown talent sustaining the city's economic success	The city's universities create a pipeline of highly skilled graduates and many of these remain in the local labour market.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	Both universities are active anchor institutions who seek to drive social value through their procurement and commissioning activity. They are Living Wage Foundation accredited.
A liveable and zero carbon city: a destination of choice to live, visit, work	The universities support the delivery of the city's zero carbon objectives and play a key role in place making, attracting investors and visitors. The universities have joined up with the University of Salford to establish the GM Energy Innovation Agency. MMU deliver carbon literacy training and the University of Manchester hosts the Tyndall Centre for Climate Change Research whose research was used to directly inform our city's 2038 zero carbon target.
A connected city: world class infrastructure and connectivity to drive growth	Both universities manage a large proportion of the city's public realm with a concentration in the Oxford Road Corridor area. They also have important digital assets.

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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. If you would like a copy please contact one of the contact officers above.

## 1.0 Introduction

- 1.1 Manchester is internationally renowned for the strength of its Higher Education Institutions which date back nearly 200 years and have always maintained a strong civic bond with the Council. The Universities' positive influence extends well beyond formal education and this report attempts to provide a summary of some of the ways in which Manchester benefits economically from its major universities.
- 1.2 Calculating a precise figure for the economic impact of higher education institutions such as The University of Manchester and Manchester Metropolitan University (referred to from this point on as 'Manchester's universities') is of course a difficult task with many different methodologies, models and proxies available. Their influence on the future lives and careers of those studying, their workforce and the impact of their world-leading research is impossible to fully quantify and there are a wide range of non-economic benefits too in terms of social cohesion, health, culture, democratic life and personal liberties.
- 1.3 This report does, however, provide a summary of some of the key economic data that is available to demonstrate the impact Manchester's universities have on the city's economy. It also includes a number of case studies to highlight specific examples of economic benefit.
- 1.4 A separate report to this committee examine student numbers and graduate retention in Manchester and should be read alongside this report. A future report on Purpose Built Student Accommodation will be scheduled.

### **CASE STUDY: Oxford Road Corridor**

The University of Manchester and Manchester Metropolitan University are key members of the Oxford Road Corridor Partnership which is Manchester's innovation district covering one square mile south of the city centre. For more than 15 years public and private sector innovation anchors in the area have worked in partnership with regional and national government to build on the Oxford Road Corridor's research and development strengths, with a shared vision to create an innovation ecosystem that can match and exceed leading innovation districts in Europe and the United States. The Oxford Road Corridor Partnership also includes the Council, Manchester University NHS Foundation Trust, Bruntwood, Manchester Science Partnerships, Royal Northern College of Music and HOME. Collectively, the Oxford Road Corridor has transformed the area with over £1.1 billion invested in health, education, culture and commercial facilities. The most recent statistics for the Oxford Road Corridor show that the district supports:

- 79,000 jobs - an increase of 24,000 since 2010
- 8,800 businesses - a 61% increase
- 50% of Manchester's life science businesses
- £3.6 billion GVA

- 50% of Greater Manchester's innovation assets
- 15,000 clinical research participants
- 74,000 students
- Over 16,000 international students
- 42% of students studying STEM related disciplines
- 27,000 graduates and post-grads supplied into the labour market each year.

## **2.0 Sustainability and the Greater Manchester Civic University Agreement**

- 2.1 Both of Manchester's universities recently signed up to the Greater Manchester (GM) Civic University Agreement, along with the Royal Northern College of Music, University of Salford and University of Bolton. The agreement committed them to working jointly to address six key priorities: Education and Skills, Reducing Inequalities, Jobs and Growth, The Digital Economy, Net Zero, and Creative and Cultural Economy. A new Civic University Board will oversee specific targets, deliverables and reporting of progress.
- 2.2 These six priorities were informed by listening to local residents. The GM universities commissioned Public First to poll a representative sample of residents across all ten GM authorities to find out how they viewed the city region's universities. The poll was undertaken in February 2021 and in total over 1,000 residents were polled with at least 100 in each local authority. Some high-level results were that:
- 83% thought GM universities are important economically to the region.
  - Economic recovery was identified by residents as the most important long-term social and economic priority followed by reducing unemployment and reducing inequality.
  - 79% (highest in GM) of residents in Manchester surveyed said they were fairly proud or very proud of the role that local universities played – a figure that was higher than in the other nine GM local authorities.
- 2.3 Manchester's universities contribute to the success of schools across the city by working with the Council's School Governance team to promote opportunities for university staff and academics to sit on school governing bodies. UoM run an award-winning initiative to encourage staff to become governors and run regular network events and conferences to support staff to be effective in their roles. At the time of writing there are approximately 70 governors appointed from UoM serving in Manchester schools.
- 2.4 The University of Manchester is also a participant in the city's Anchors & Living Wage Pilot. This aims to promote both the living wage and local employment opportunities within the participating organisations and within their wider sectors. UoM's involvement will help Manchester become an accredited living wage place by the end of 2022, raising the living standards of residents and directly helping to eliminate one of the leading causes of poverty in the city.

### 3.0 Research, teaching and economic impact

- 3.1. Manchester's universities commissioned Public First to undertake some analysis of the research, teaching and economic impact of the two universities. The research was undertaken in 2020 and reviewed available data for 2018/19 which was obviously pre-pandemic.
- 3.2 In total, Public First estimated that the Manchester universities created £5.3 billion in value for the UK in 2018/19, £2.1 billion for Greater Manchester (2.7% of the GM economy) and £1.2 billion for Manchester.
- 3.3 This £1.2 billion of value for Manchester from the two universities comprised of three key areas:

	Manchester	Greater Manchester	UK
<b>Teaching impact</b> by increasing the human capital and skills of its students for the economy	£217 million	£405 million	£1.2 billion
<b>Research impact</b> from the spillover economic impacts of research	£15 million	£86 million	£2.0 billion
<b>Economic</b> impact from direct, indirect and induced activity	£945 million	£1.6 billion	£2.0 billion
<b>Total</b>	<b>£1.2 billion</b>	<b>£2.1 billion</b>	<b>£5.3 billion</b>

### 3.4 Economic impact

- 3.4.1 The nature of any university's teaching and research impacts are that they spillover much more into the national, rather than the local, economy. However, the opposite is true of the economic impacts, which are disproportionately located in Manchester and Greater Manchester.
- 3.4.2 The £945 million of economic impacts in Manchester comprise of the following:

	Manchester
<b>Direct</b>	
Operational spending on salaries and finance costs	£222 million
Student subsistence spending	£282 million
Visitor spending	£12 million
<b>Indirect</b>	
Supply chain / procurement	£60 million
Student subsistence spending	£136 million
Visitor spending	£5 million
<b>Induced</b>	
Staff spending	£58 million
Supply chain / procurement	£34 million

Student subsistence spending	£125 million
Visitor spending	£10 million
<b>Total</b>	<b>£945 million</b>

- 3.4.3 These considerable economic impacts can be explained through Manchester hosting one of the largest student populations in Europe, with numbers averaging around 100,000 students in the city region and in excess of 70,000 in the city itself. One in five students in the city is also an international student. The University of Manchester is home to more than 44,000 students and Manchester Metropolitan University to around 33,000. These students contribute £543 million to Manchester alone through direct, indirect and induced expenditure to the economy, as well as contributing to the skills, creativity and vibrancy of the city. Each year Man Met graduates 950 teachers, 350 nurses, 160 physiotherapists, 570 with other health qualifications, and 220 social workers. This pipeline of graduate talent provides the skilled workers needed by employers and essential public services across the country.
- 3.4.4 The University of Manchester employs around 11,000 staff and Manchester Metropolitan University employs over 4,000 staff. These comprise of academic and support roles at all occupational levels. For example, both universities employ significant numbers of staff in areas such as hospitality and catering, professional services, technical, manual and administrative roles. These staff spend money in the economy. All staff are remunerated with at least the Living Wage Foundation accredited rate of pay and staff enjoy a wide range of other benefits such as occupational pensions and flexible working. Both universities are committed to achieving the GM Good Employment Charter status.

#### **CASE STUDY: ID Manchester**

ID Manchester is an 18.2 acre, £1.5 billion gross development value project that will create a world leading innovation district and 10,000 jobs on The University of Manchester's former North Campus (the former UMIST campus). It is the next phase of development of the Oxford Road Corridor and will create around 2.6 million sq ft of new office, laboratory and collaboration spaces to incubate and accelerate the growth trajectories of new spin outs and start-ups, support SMEs to innovate and grow, and attract new R&D-intensive global inward investment to the region. ID Manchester has been explicitly designed to maximise the economic impact of the existing R&D assets on the Oxford Road Corridor which have been supported through past UK government investment into scientific excellence, including the Henry Royce Institute, the National Graphene Institute, the Graphene Engineering Innovation Centre, the £25m Christabel Pankhurst Institute for Health Technology, and the Manchester Institute of Biotechnology, all of which are located nearby.

The University of Manchester announced Bruntwood SciTech as its preferred Joint Venture partner to deliver ID Manchester in June 2021, which will directly leverage over £800m of private sector investment into the development. Bruntwood SciTech is a partnership between Bruntwood and Legal & General and is the UK's leading developer of innovation districts.

- 3.4.5 Other economic impacts can be seen from the £94 million of procurement and supply chain impacts from the indirect and induced supply chain spend of the two universities. Both of Manchester's universities are major anchor institutions in the city and have worked with the Council to maximise the social value opportunities from their spend.
- 3.4.6 Each year, Man Met spends more than £100 million on procurement. The University creates £525 million in additional demand for the Greater Manchester economy through the direct value created by the university, its wider supply chain and procurement spending with local businesses, the additional local spending of its staff, students and their visitors.
- 3.4.7 To deliver Social Value, the Man Met Procurement Strategy incorporates opportunities for creating Social Value into all of contracts, encouraging suppliers to offer opportunities for employment, training, placements and work experience to communities and students. They are encouraged to be transparent about their supply chains, ensuring compliance with the Modern Slavery Act and Health and Safety, whilst good working practices are also assessed as part of the tender process. Each lead construction contractor demonstrates a commitment to Corporate Social Responsibility (CSR) and delivers local benefits through a CSR plan, which include measurable commitments to local employment, skills development and community engagement.

#### **CASE STUDY: The University of Manchester Engineering Campus Development**

With a value of £400 million, The University of Manchester Engineering Campus Development (MECD) project was among the largest construction programmes undertaken in British higher education, totalling some 11 football pitches in size. What's unique is not only its scale; it's created a record in British higher education by delivering £19.7 million of social value, created through the generation of local jobs, apprenticeships, cash grants and pro-bono support for local communities. Using the sector-leading 'Social Value Portal' tool with its construction partner Balfour Beatty it was calculated that £19.7 million of social value was created for local communities, setting a record for all construction programmes to date in British higher education. The project has now won awards at both the 2020 Times Higher Education Awards and 2021 British Construction Industry Awards in recognition of this achievement.

This £19.7 million of social value consists of:

- 182 new jobs created (target 110), including 95 jobs for unemployed people furthest from the labour market and 87 apprenticeships. Of these, 15 were rehabilitated offenders and one was from local authority care;
- 3,000 schoolchildren from local state schools were engaged across 29 STEM activities;



- 43 local community groups were engaged and supported; £60,000 was contributed to a joint University Community Construction Fund for local community grants; and £18,000 raised for a local homelessness charity;
- A maximum score of 45 out of 45 was achieved in the national 'Considerate Constructors Scheme' covering positive impact on community and the environment (target 40);
- 23 careers events were delivered for University of Manchester students; 4 new graduate trainee positions created; and 10 student internships;

Quotes from beneficiaries:

On jobs, Edgar, who experienced homelessness, was supported into a plastering role. He said: "Through this job opportunity I've been able to move into my own accommodation and move my life on."

David, initially offered a three-week work trial, said: "I was previously unemployed for over 13 years. Three weeks into my placement I was offered a full-time role and this has changed my life for the better."

James, an armed forces leaver, said: "I joined work on MECD as a labourer but have already retrained towards a job I love in waste management."

## 4.0 Education and Skills

- 4.1 By increasing the human capital and skills of their students, the Manchester universities increase Manchester's productivity by £217m. Approximately 36,000 graduates each year within the region seek to enter the labour market and approximately 10,000 within the city. Detailed analysis of student numbers and graduate retention in the city has been included in a separate report to the Committee.
- 4.2 Manchester's universities, along with twelve other colleges and universities from across Greater Manchester, came together to develop a joint commitment to addressing the skills and economic challenges facing the city region. Collectively, these fourteen universities and colleges in Greater Manchester support 200,000 learners annually and contribute £2.5 billion to the regional economy. The joint statement set out closer cooperation on:
- Levelling-up across Greater Manchester and nationally to heal and build back better from the COVID-19 pandemic
  - Lifelong learning
  - Mental health and wellbeing
  - Closer work with Greater Manchester Combined Authority to support regional priorities
  - Supporting health, culture and equality
- 4.3 Manchester's universities are also members of the Greater Manchester Higher programme along with the Manchester College and Royal Northern College of Music. This programme aims to improve the provision of information, advice and guidance about progression routes to higher education to raise

expectations of young people and help widen participation. Activities are aimed at Year 9-13 learners, their parents, carers, and supporters and are targeted at the parts of the region where, historically, the number of young people going to university is at its lowest. The programme also provides outreach activities for schools and colleges located outside of these areas.

#### **CASE STUDY: The Manchester Access Programme**

Operating since 2006, the Manchester Access Programme is the University of Manchester's flagship social mobility programme for local Year 12 students in Greater Manchester from disadvantaged backgrounds. It has supported thousands of local learners to enter professions including medicine, dentistry, nursing, accounting, law, business, engineering and teaching. Through advice, financial support and lower admissions offers it supports students to gain a place at the University of Manchester, or another research-intensive university, through online events, workshops, and an academic assignment. Accessing the scheme requires applicants to meet the following criteria:

- live or study at a school or college in Greater Manchester;
- attend a state, post-16 school or college, and are studying a two-year Level 3 qualification (such as A-levels or a BTEC);
- be a Year 12 (lower sixth) student when they apply;
- have at least five grades 9 to 6 at GCSE (or equivalent, such as GNVQ, BTEC) when they apply.
- have attended a state secondary school that they did not need to pay for;
- neither parent nor carer has a university-level degree or equivalent in the UK or abroad. An application may be considered if a parent/carers is currently studying their first degree or graduated in the last ten years;
- be a home registered student or expect to be a UK national or have 'settled status'

Each year 600 students benefit from the programme with a disproportionate number of these hailing from Manchester.

#### **CASE STUDY: MMU First Generation**

The MMU First Generation programme supports Year 12 and Year 13 students living or studying in the North West that would like to go to university but whose parents did not. The programme provides practical support and application guidance to students to help them access and then transition to university. Students who progress through the programme onto a full-time undergraduate degree at MMU receive financial and continued personal and professional support throughout their studies. They also qualify for a First Generation bursary of £1,000 and the opportunity to attend a fully-funded workplace residential. The programme aims to help:

- support students in their university applications;
- improve skills that help them to succeed in their current studies and at university, including research skills, referencing academic writing, and communication skills;
- prepare them for the different types of teaching and learning at university;

- provide information about the different courses available;
- show them what it's like to be a university student.

To date, 148 of the 426 students who have progressed to Man Met since the scheme was launched were from Manchester (35%).

### **CASE STUDY: Manchester Metropolitan University's Degree Apprenticeships Programme**

Degree apprenticeships were established in 2015 as a powerful combination of study and on the job learning. With 2,573 apprentice starts to-date, Manchester Metropolitan University is now partnered with more than 500 employers and is an Ofsted Grade 1 Outstanding provider.

Degree apprenticeships are particularly important for young people from disadvantaged backgrounds who might not have been motivated to embark on a traditional degree, but also for those already in work without a degree who are looking to progress. Apprenticeships are the right intervention for those with intersectional disadvantage.

In the last six years Man Met's programme has seen increasing starts for women in STEM, for Black and minority ethnic apprentices from disadvantaged backgrounds, and increased retention and achievement rates for apprentices from areas with a low Indices of Multiple Deprivation ranking in the Income, Employment and Education and Skills domains. They are also benefitting employers by growing talent and reducing skills shortages in Manchester's economy.

40% of the degree apprentices are from Greater Manchester. 40% are the first generation in their family to go to university and 36% are from the most deprived areas.

Man Met's degree apprenticeships programme has been voted the highest-rated university provider for degree apprenticeships in the UK for three years running (RateMyApprenticeship Awards 2019, 2020, 2021).

## **5.0 Research**

- 5.1 The spillover economic impact of the university's research generates another £2 billion in value for the UK economy and £15 million for Manchester's economy. The University of Manchester is globally renowned for its research and has identified five research beacons which are: Advanced Materials, Biotechnology, Cancer, Energy and Global Inequalities. Manchester Metropolitan University has a Research and Knowledge Exchange Strategy which commits to research excellence that:

- Has real-world benefits for society, culture, the environment and the economy

- Addresses global challenges and contributes to government industrial strategy
  - Encourages links between research, professional practice and teaching
  - Ensures faculties can rank nationally in specific areas of expertise
  - Leads the sector in KTPs that meet 100% Full Economic Costing targets
  - Creates an effective and inspiring ecosystem of internal and external knowledge
- 5.2 Man Met is ranked in the top 10 in the UK for creating Knowledge Transfer Partnerships – turning research into business growth. Since 2013, the University has been awarded 33 Knowledge Transfer Partnerships (KTPs) with Greater Manchester businesses, 28 of which have been SMEs. This amounts to a total funding investment within the Greater Manchester area of £3.5 million with a match funding contribution from business totalling £2 million.
- 5.3 There are currently four live KTPs in Manchester, covering:
- Using artificial intelligence to improve productivity and efficiency of integrated vending machine services.
  - To develop product innovations using Artificial Intelligence and psychometric profiling, for a company that provides market intelligence on children and families.
  - To investigate a type of stem cell, to develop it into a cancer treatment.
  - To develop a faster new product development process for a company specialising in flavourings for the food industry.
- 5.4 Other important examples of how Man Met translates and applies its research can be found in Innospace, a business incubator that gives start-up businesses direct access to expertise, and initiatives such as Print City (which provides advanced 3D printing facilities to businesses) and the Fuel Cell Innovation Centre that is at the forefront of developing low-carbon solutions for the green economy.
- 5.4 Academics from Manchester's universities have undertaken significant amounts of research since the start of the COVID-19 pandemic, including where it has hit the hardest, how it affects certain groups, and how its impact can be mitigated. So far, they have carried out 234 research projects on COVID-19 between them, with a further 156, and growing number of, studies on the way.
- 5.5 The School of Digital Arts is an interdisciplinary school at Manchester Metropolitan University – a £35m investment into the workspaces, networks, teaching and research that will drive the next generation of creative content. Every year from 2021, over 1,000 students will study disciplines that span film, animation, UX design, photography, games design, AI and more, often working on live projects with industry partners, frequently collaborating with fellow students and researchers.

- 5.6 The University of Manchester hosts the world-renowned Tyndall Centre for Climate Change Research. Scientists at the Tyndall Centre helped Manchester become one of the first cities in the world to set Paris COP21 compliant science-based targets in November 2018. The work on establishing a carbon budget and our zero carbon 2038 target has now been rolled out to a number of other local authorities and cities in the UK and internationally. The Tyndall Centre continue to be an active member of the Manchester Climate Change Agency advisory groups and their scientists have undertaken further work to analyse the city's emissions including reviewing emissions from aviation.
- 5.7 The Manchester Fuel Cell Innovation Centre is a landmark £4.1 million state-of-the-art laboratory at Manchester Metropolitan University, leading the way in harnessing renewable energy. The Centre is exploring the pure science of the fuel cell itself, driving engagement with industry on a local, national and international scale, and developing the technology talent of tomorrow. A strategic asset for the city and University, the Centre brings together the latest technology, world-leading academics and industry professionals to create new, clean electrolyzers and fuel cells. It brings alive the synergy between materials research and engineering. The focus is on next-generation energy, which will outperform current fossil fuel alternatives both in terms of environmental efficiency and cost effectiveness.
- 5.8 BeeWell ([www.gmbeewell.org](http://www.gmbeewell.org)) is a new wellbeing programme led by The University of Manchester, the Anna Freud centre and the Greater Manchester Combined Authority, that combines academic expertise with youth-led change to make the wellbeing of young people everybody's business. Designed by young people, #BeeWell will survey the wellbeing of pupils in secondary schools across Greater Manchester from Autumn 2021, for at least three years, and use the results to deliver positive change in all our communities. Over 200 secondary schools (60,000 young people) are now signed up to take part which represents 90% of mainstream settings across Greater Manchester, alongside independent and special education needs schools, pupil referral units and alternative provision.

#### **CASE STUDY: Institute of Place Management (IPM)**

In 2015, Manchester City Council Members agreed that they wanted to develop a more strategic approach to the future management of district centres. They agreed to establish a subgroup to contribute to and review this strategy, working with the IPM based at Manchester Metropolitan University. The first task was to understand trends affecting district centres and possible direction of the Subgroup's work – drawing on consultations with IPM.

The IPM began working with Manchester's district centres in early 2017, delivering a programme focused on 'Vital and Viable' places and working with communities in Chorlton, Gorton, Harpurhey, Northenden and Withington. The work was designed to support place making interventions, strengthen the local capacity for change, and to help make informed decisions about the future of each place.

Following this, an IPM Place Management Pilot was established to understand the key factors that local centres can influence. Research was undertaken in Chorlton, Gorton, Harpurhey and Northenden, with a view to promoting active collaboration in these centres to bring about change. The Pilot drew on initial district centre performance assessments by IPM researchers, consultation with local stakeholders, and a report of recommendations.

In addition to recommendations specific to each Centre, the IPM reviewed all the pilots and produced four summary recommendations for the District Centre Subgroup;

- Work should be undertaken to develop targeted and place specific interventions to build local collaboration
- Work should be undertaken to increase local capacity to effect change in areas of the city where existing capacity is low
- Efforts should be devoted to enhancing existing local collaborative networks
- Monitoring data on centre performance should be collected and shared with partners so that evidence based actions to improve centres could be taken.

Further work took place in another six centres – Withington, Fallowfield, Rusholme, Levenshulme, Victoria Road, and Cheetham Hill – and focused on widening the evidence base, developing learning, and the creation of an action plan geared towards influencing local and regional policy. This work has helped to support project development including the Withington Village Strategic Regeneration Framework and bids to the government Levelling Up Fund.

The Vital & Viable project has also informed further policy development work through the Area Based Collaborative Entrepreneurship in Cities European Partnership (ABCitiEs). Working in conjunction with Institutions and local authorities in four European cities (Amsterdam, Vilnius, Varazdin and Athens), the project has taken the learnings from the work in Manchester and is now seeking to embed this in local policy.

## **6.0 Business support, innovation, enterprise and start-ups**

- 6.1 Whether its splitting the atom, the development of the modern computer or the isolation of graphene, many of the most transformative ideas of our age were formed in Manchester. These produce a range of spin-out benefits to the wider economy and health system, as can be seen from the examples of ID Manchester, Health Innovation Manchester and across the wider Oxford Road Corridor. For example, the discovery of Graphene in 2004 led to significant investment in advanced materials research across the city including the National Graphene Centre, the Graphene Engineering Innovation Centre and the Henry Royce Institute. Today, this is benefiting local SMEs through an

ERDF/Northern Powerhouse funded Sustainable Materials Innovation Hub which is improving the understanding, use, and consumption of plastics across the region and offering free advice to organisations looking to make a change and support them with assessment facilities to develop innovative solutions.

- 6.2 Data from 2018 shows that 148 students from the two universities were involved in creating start-ups and The University of Manchester brought in £5.5 million in public money for work on local growth and regeneration.
- 6.3 Both universities are key drivers behind Innovation GM, which is a £7bn blueprint for translational innovation between Greater Manchester and Government. This aims to catalyse inclusive economic growth to support the UK in achieving its goals of levelling up the North, increasing productivity and increasing global trade. Innovators from business, science, academia and local government are using the Innovation GM partnership as the basis of formal collaboration deals with Government and it is expected that it could create as many as 100,000 jobs and boost the economy by £7 billion across Greater Manchester

#### **CASE STUDY: Greater Manchester AI Foundry and Cyber Foundry**

The Greater Manchester AI Foundry is a cutting-edge scheme that has delivered Artificial Intelligence expertise to 100 of Greater Manchester's small and medium enterprises.

The foundry, which is led by Manchester Metropolitan University, with The University of Manchester, the University of Salford and Lancaster University, allows SMEs to undertake introductory business support training and insight into the latest AI technologies, market opportunities and ideas to develop new products.

Businesses can then progress onto phase two, a technical support programme to help companies develop proof-of-concept for new products and services. Currently 20 SMEs have progressed to phase two with more due as the programme continues.

A year before the AI Foundry was launched, the same Universities launched the Greater Manchester Cyber Foundry, a £6 million project to provide bespoke cyber security support to SMEs.

The Foundry is part of the wider push to make Manchester a digital leader. The regional digital and creative sector alone generates £3 billion in output each year, highlighting the importance of protection for key industries from cyber threats.

Strong cyber security is essential for other important sectors in Manchester, such as finance and banking and Industry 4.0 applications, where cyber physical systems are used.

### **CASE STUDY: The University of Manchester Innovation Factory**

The University of Manchester Innovation Factory's mission is to use intellectual property to create positive social and economic impact. The Innovation Factory works with academic and student inventors to identify research that has the potential to create value. It then translates these into a form where they can be used to benefit society as a whole.

Access to innovations may be created via technology licensing or the formation of new spin-out companies. The Innovation Factory aims to provide a world class service to academic colleagues as well as industry; entrepreneurs; licensees; VC & angel investors and corporate venturing partners.

The Innovation Factory aims to be one of the world's most effective Technology Transfer organisations. In 2020/21 it spun out 13 new enterprises in areas including gene software, battery charging, mental health and advanced cancer treatment.

The average external investment per formal spin-out was £4.2 million and the estimated current turnover of all active firms per active spin-out was £24.3 million in 2018.

## **7.0 Public engagement and reputation**

- 7.1 Whilst this report demonstrates a range of 'hard' economic benefits, the impact of Manchester's universities on engagement with the public is also significant. The University of Manchester runs major cultural attractions including Manchester Museum, Manchester Academy, the Whitworth, the John Rylands Library, and the Race Relations Resource Centre. Manchester Metropolitan University oversees the North West Film Archive and Children's Literature Festival. The two universities worked with Manchester City Council to lead the successful UNESCO City of Literature bid.
- 7.2 Public First developed an engagement metric to measure the frequency of the two universities' engagement with the public across dimensions – including public events, mentoring and exhibitions – and found that a member of the public in Greater Manchester came into contact with one of the two universities 4.3 times per minute, or once every 14 seconds across the course of a typical year.
- 7.3 The national and global reputation of the city and the universities are intertwined. Manchester's 'original modern' reputation around the world is built on the pioneering discoveries of academics such as Rutherford, Turing and Geim. Key public figures are associated with the universities, including Brian Cox, Jeanette Winterston, Carol Ann Duffy, Lemn Sissay, David Olusoga, Michael Wood, and Gary Younge. The University of Manchester is the most popular in the UK for undergraduate applicants and leads 1,200 universities



around the world for impact towards the UN Sustainable Development Goals as measured by the Times Higher Education. Manchester Metropolitan University has been in the top 3 of the UK's People and Planet university league table for each of the last six years.

- 7.4 The Manchester Poetry Library opened its doors in September 2021 at Manchester Metropolitan University. Home to a rich collection of books and recordings, poetry in the many languages of the city of Manchester, children's poetry, and an annual programme of events, the library is the first of its kind in the North West. It is a rich resource for the people of the city, with a year-round event programme that builds on Manchester's outstanding reputation as a home of poetry and creative writing.
- 7.5 The Institute of Sport will open in Manchester city centre in early 2022. It will be a global leader in sport education, sport research, and sport impact and the new state-of-the-art building will have space for delivery of teaching up to 1,800 students, with 500+ graduates by 2023. It will be a place that will unlock the power of sport, bringing benefits to society relating to health and wellbeing, economic regeneration, and cultural enhancement.
- 7.6 Over 18,000 international students study at The University of Manchester and over 3,000 at Manchester Metropolitan University. The University of Manchester has more than 500,000 alumni in 190 countries and Manchester Metropolitan University more than 300,000 alumni in 144 countries. These provide global reach, soft power, connections and trading opportunities with a significant network of people around the world that have lived in, and remain connected to, the city.

**CASE STUDY: Joint Education Institute between Manchester Metropolitan University and Hubei University**

The Manchester Metropolitan Joint Institute, Hubei University was officially launched in October 2021 to provide new education programmes in Wuhan, China.

The new Institute builds on the growing partnership between Manchester Met and the city of Wuhan, which is a twin city of Manchester.

Students at the joint institute (JI) will be able to study on three initial science and engineering undergraduate programmes, with further postgraduate programmes to follow next year. Students also have the opportunity to spend part of their degree course studying at Manchester Met.

The JI is the next step in the University's plans to build ties with China, increasing activity in the country and promoting study opportunities in Manchester.

The new institute comes a year after Man Met's office premises in Wuhan were officially opened by the British Ambassador to China, Dame Caroline Wilson. Wuhan has been the University's regional headquarters since June 2019.

The partnership is helping to build students' cultural understanding and significantly enhance their abilities to thrive in diverse, multicultural environments both in the UK and China.

## **8.0 Next steps**

- 8.1 The relationships between the universities and the city are interdependent. All our higher education institutions contribute to the success of the city through their contribution to talent, research, commercialisation of technology, social responsibility and sustainability and the opportunities they create for our residents. Similarly, Manchester itself contributes to the success of our universities through our offer of good quality employment opportunities, city centre living, a broad and varied cultural and leisure offer and our diverse and welcoming people.
- 8.2 Therefore it is in Manchester's interest to support the continued success of our HEIs. The city will continue to work closely with the universities to make sure they are rooted in place and can make the greatest possible contribution to positive outcomes for our residents, businesses and other organisations. We will also support the development of the university estates including the new ID Manchester development as a key driver of the city centre's success.

## **9.0 Recommendations**

- 9.1 It is recommended that the Committee consider and comment on the content of the report including the detailed case studies.

## Manchester City Council Report for Information

**Report to:** Economy Scrutiny Committee – 11 November 2021

**Subject:** Student numbers and graduate retention in the city

**Report of:** Director of Inclusive Economy

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### Summary

The purpose of this report is to provide an overview of the student body studying at the higher education institutions (HEIs) in Manchester with a specific focus on the two largest institutions: The University of Manchester (UoM) and Manchester Metropolitan University (MMU).

The report also provides an overview of the numbers of graduates remaining in the city post-graduation and includes the emerging picture of the impact of COVID-19 on the student body, graduate retention and attraction and the local response to support the graduate labour market.

### Recommendations

The Economy Scrutiny Committee is invited to comment on the report.

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### Wards Affected: All

#### Environmental Impact Assessment -

Any growth in student numbers would increase overall carbon emissions in the city, however per-capita emissions from students are likely to be lower than average. The city's universities and higher education sector play an important role in in terms of producing a talent pipeline of graduates with the skills, knowledge and mindset to address the challenge and maximise the opportunities presented by the green economy. The ongoing challenge will be to ensure that these skills remain with the city's economy to support zero carbon ambitions.

Our Manchester Strategy outcomes	Summary of how this report aligns to the OMS
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	This report identifies the role of the graduate talent pipeline in the diversification of the economy in developing and sustaining employment and wider opportunities for the city's residents.

A highly skilled city: world class and home-grown talent sustaining the city's economic success	This report identifies the importance of the university student body and the graduate talent pipeline in supporting economic diversification and growth. The report also describes work undertaken to support Manchester residents to achieve degrees and equivalent qualifications.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	This report highlights work done in the education sector to support young Mancunians to progress to higher education and higher technical education as a route to high quality employment opportunities.
A liveable and low carbon city: a destination of choice to live, visit, work	Please refer to Environmental Impact Assessment.
A connected city: world class infrastructure and connectivity to drive growth	The report identifies the international reputation of Manchester's higher education institutions on the global stage.

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### Background documents (available for public inspection):

The following documents disclose key 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. If you would like a copy please contact one of the contact officers above.

- Our Manchester Strategy – Forward to 2025
- The Greater Manchester Local Industrial Strategy
- Our Manchester Industrial Strategy
- The State of the City 2020
- Developing a More Inclusive Economy – Our Manchester Industrial Strategy
- Powering Recovery: Manchester's Recovery and Investment Plan
- Skills for jobs: lifelong learning for opportunity and growth
- Graduate Market 2021, [Highfliers.co.uk](https://highfliers.co.uk)
- Conclusion of Review of Post 18 Education, DfE
- Class of 2020, Resolution Foundation

## 1.0 Introduction

- 1.1 This report provides an overview of higher education student numbers in Manchester and retention of this student body in the city post-graduation. The report also describes the graduate labour market conditions and local interventions to support the graduate pipeline.
- 1.2 Students come to Manchester from all over the UK and the world to take advantage of the world class education offer. The city hosts one of the largest student populations in Europe, with numbers averaging around 100,000 students in the city region and in excess of 70,000 in the city itself, with 1 in 5 students in the city an international student. Annually, approximately 36,000 students graduate within the region and approximately 10,000 within the city. This report will provide an overview and comparison of the student numbers in the last 4 academic years by institution.
- 1.3 Manchester's HEIs are home to world class facilities and specialisms, centres of excellence, research and expertise and as such have supported growth in the city's key sectors. The large and growing sectors bolstered by the city's graduate talent pool include: business, financial and professional services; creative and digital, cyber, fintech, bioscience, advanced material and research and development. Despite the pandemic, and due to the responsive nature of the industries, growth in these sectors has been experienced throughout 2020/21 and is projected to continue.
- 1.4 According to research undertaken by the Centre for Cities,<sup>1</sup> Manchester has the largest outside graduate talent pool outside of London. This talent pool has supported the development of an increasingly skilled and diverse workforce. In turn this has resulted in elevated levels of confidence in Manchester and increased levels of inward investment. A rise in graduates within Manchester is a positive trend that sets Manchester above the national average for the proportion of residents who hold level 4 qualifications and above. Despite an increase in graduates, the retention and attraction of graduates, skills shortages remain across a number of key sectors, and graduate underemployment remains an issue nationally and within Manchester. In addition, labour shortage issues have risen to the fore following the pandemic.
- 1.5 Prior to the pandemic, employment growth in Manchester had been driven by new businesses investing in the city. Businesses have been attracted to Manchester by sectoral strengths, as a more affordable alternative to London and as a gateway to the North. In addition, there has been continuous growth in business start-ups across the city, often fuelled by the universities and graduates, which has supported further inward investment. As well as supporting graduate attraction and retention, investment in the city has also benefited residents and the wider economy through an increased number and range of employment opportunities e.g., administration and professional support services, hospitality, and retail. The graduate talent pipeline is an essential component of achieving the city's strategic ambitions and plays an

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<sup>1</sup> <https://www.centreforcities.org/reader/great-british-brain-drain>

important role in supporting the city and regional economy, and in providing opportunity for the city's communities and residents. The wider economic and social impact of the HE institutions are discussed in a separate report presented to today's committee: Contribution of Higher Education Institutes to Manchester's economy.

- 1.6 Manchester's strategic economic aims are set out in Developing a More Inclusive Economy – Our Manchester Industrial Strategy and Powering Recovery: Manchester's Recovery and Investment Plan. The Our Manchester Industrial Strategy set out three key pillars of people, place and prosperity that will support the development of a more inclusive economy and ensure that all Manchester's residents can participate in and benefit from the city's economic growth. In relation to retaining graduate talent in the city, opportunities for strategic investment identified in the Recovery Plan, particularly in relation to innovation, will provide ongoing graduate employment opportunities and ensure that Manchester remains an attractive choice to graduates from Manchester's HEIs and beyond. The plan also identifies that Manchester has the potential to leverage GM's science, research, innovation and teaching-asset base to create new large-scale clusters of high-value economic activities to drive regional growth and create a more productive economy with greater Research and Development activity. The Recovery Plan also lays out a two-year programme with £36m per annum investment to support skills development in 6,000 people and specifically includes a 14m Graduate Upskilling Programme.

## **2.0 Background**

### **2.1 National post 18 education policy**

- 2.2 The Augar Review published in May 2019 reviewed academic and technical qualifications across the post-18 education system to ensure a more demand led skills system and to promote parity of esteem across academic and technical pathways. The Review highlighted the need for increased investment in higher level technical skills particularly at Level 4 and 5 and a need to level up investment in education and training for students choosing a non-HE route. This is particularly for important to ensure choice, equality and inclusion across the system and in terms of meeting skills needs across the city's sectors.
- 2.3 The *Skills for Life: Lifelong learning for opportunity for growth* white paper published in January 2021 begins to set out a response to the Augar Review by setting out planned reforms to Further Education (FE) technical training and education. The white paper has a focus on: employer led post-16 development; funding for adults to upskill; flexible funding to support post-18 education for higher technical qualifications at level 4 and 5; improved accountability of the FE sector; investment in FE estates; streamlined FE funding and employer led teacher training and strategy to attract talent to the FE sector. The October 2021 Budget did not announce any HE funding commitments, a HE White Paper is now expected later this year to cover

significant policy areas including admissions, tuition fees and Lifelong Loan Entitlements.

- 2.4 Despite evidence highlighting the economic impact of COVID-19 impact on young people, and calls from the sector, there were gaps in national COVID-19 policy response and support for graduates. For example, the Kickstart scheme, launched in September 2020 provides fully subsidised work placement opportunities, paid at the national minimum wage for 16 to 24-year-olds at risk of long-term unemployment. Participants must be in receipt of Universal Credit in order to access the scheme. The Universal Credit criteria and relatively short-term length of the scheme may discourage and/or exclude recent graduates from joining the scheme. Feedback from providers in Manchester, both anecdotally and through the Council's Kickstart recruitment, suggests an increasing number of graduates accessing the scheme. Graduates accessing the scheme have accessed the labour market, gained valuable work experience and built confidence. As such, the Kickstart scheme has prevented graduates in Manchester from being displaced from the labour market for an extended period. The challenge for the Council, DWP and partners is to support suitable progression and career development opportunities following a Kickstart placement. Ensuring that graduates are not under-employed, and that the skills and talents are fully utilised to support the individual, the businesses and the city's economy. In addition, delays with the implementation of the scheme nationally and locally has resulted in Kickstart opportunities not being available at scale for young people in the city.
- 2.5 Despite a specific national policy response for graduates and youth unemployment rates spiking more than any other age group at the start of the pandemic, evidence now shows that youth employment is recovering more quickly than other age groups. The Council's September 2021 Economy Dashboard Data shows that the 16-24 age group had the largest decline, 2.1%, in Universal Credit Claimants that any other age group.

### **3.0 Overview of Manchester's higher education provision**

- 3.1 Within the city the University of Manchester (UoM), Manchester Metropolitan University (MMU), Royal Northern College of Music (RNCM) and UCEN Manchester provide a plethora of undergraduate and postgraduate courses in academic and vocational fields. In the wider city region, the University of Bolton and University of Salford and UA92 provide further higher educational opportunities that add value to the city region's talent pool and employment base.
- 3.2 In recent years, Manchester has become an increasingly young city, in part driven by the strong higher education (HE) provision and ensuing graduate retention and attraction of graduate talent from universities outside of the city. Higher Education Statistics Agency (HESA) data shows that in the academic year 2018/19, 73,299 students enrolled at Manchester's two largest universities, UoM and MMU. This cohort increased to 73,906 in 2019/20. HEIs have reported increases in 2020/2021 admissions and an increase in applications for 2022/2023 study.

- 3.3 Manchester's universities have a strong international reputation for excellence and attract significant numbers of international undergraduates and postgraduate students each year. This has contributed to Manchester's reputation as a young, international, cosmopolitan, and welcoming city and has played a significant role in institutional funding contributing to the breadth of curriculum offer for home students and the research and innovation capacity.

#### **4.0 The impact of COVID-19 on the higher education sector**

- 4.1 The impact of COVID-19 on young people in education and the labour market has been well documented. Levels of educational participation and achievement were significantly affected by family circumstances, particularly in relation to digital exclusion with young people from more deprived background more likely to have been more adversely impacted.
- 4.2 The impact upon students' mental health has also been an area of significant concern particularly for young people from lower socio-economic backgrounds. With high levels of family and child poverty in the city, this is likely to have a long-term impact on educational, employment and wider life outcomes for many of the city's young people. The post-16 and post-18 sectors worked collaboratively with the Council and wider health providers and partners to provide targeted support to young people where possible. In addition, there was increased collaboration across the HE sector and partnership working with the Council. For example, the Work and Skills Bulletin was made available to careers services at HEIs across the city. HEIs, and the wider education sector, ensured a flexible careers service was available to 2020 graduates as they navigated entry to the labour market in the pandemic.
- 4.3 The changes in the education sector throughout the pandemic have altered the student experience with opportunities for new social and life experiences reducing significantly, meaning that for many students the opportunity to increase human and social capital throughout FE and HE study has been decreased or at worst removed. Again, this has a greater impact on students from lower socio-economic backgrounds. The true impact of this is unquantifiable yet likely to be long lasting in terms of educational attainment, career prospects and earning potential.
- 4.4 FE institutions and universities report that COVID-19 restrictions impacted quickly and significantly upon student educational and work-based learning opportunities, both paid and voluntary, due to businesses models being adapted and as some industries focused on survival. The sectoral impact on hospitality, leisure and culture also reduced the ability of students to gain part time employment, many students rely on this employment and income to financially support their higher education study. This lack of casual employment opportunities has also impacted on core social and employability skills developed in the workplace that graduates can call upon to support their transition into full-time employment post-graduation. Conversely, since the opening up of the economy, the hospitality industry is reporting substantial



levels of unfilled roles as the impact of Brexit on the labour market come to the fore.

- 4.5 Evidence from the 2008 recession shows a scarring effect of recession on young people. Resolution Foundation research<sup>2</sup> shows that, for several years after having left education, employment rates across the cohorts that left education during the 2008 financial crisis were lower than for those who left education before or after the crisis. Whilst non-graduates experience the largest and longest scarring effects, graduate ‘recession leavers’ also experienced substantial effects, with a higher likelihood of underemployment rates as opposed to being out of work altogether. Resolution Foundation evidence also showed that for several years, both graduates and non-graduates, had lower hourly pay than their counterparts who left education after the recession. The medium to long term impact on Manchester’s labour market remains unknown. Recovery from COVID-19 will be unique in comparison to previous recessions, with predictions shifting throughout 2020 and 2021 in line with the varying restrictions on education and the wider economy.

## 5.0 A Level results

- 5.1 Education closures in the academic years 2019/2020 and 2020/2021 led to a shift in examination assessments to Teacher Assessed Grades. Nationally, concerns were raised over the system designed to reward performance as opposed to potential. Following the publication of A Level grades in 2021, The Social Mobility Commission (SMC) State of the Nation Report published in 2021 stressed that the gap between economically disadvantaged and their more affluent peers had widened. The SMC stated that the system of Teacher Assessed Grades does not mitigate against the hardest hit and made it inevitable that the gap between the most disadvantaged students and their peers would widen. At the same time as the gap widening, there was an increase in top grades being awarded, seen disproportionately in the most privileged schools which could run the risk of crowding deserving students out of top universities. There are also regional differences in A-Level results that mirror some of the differential impacts of coronavirus and disadvantage. The system did not allow flexibility for the small minority of heavily affected young people, resulting in long-term and deep-rooted widening of inequality in educational attainment that correlates to employment outcomes.
- 5.2 Despite this, Manchester’s overall post 16 performance remained strong. Manchester’s 2021 A Level breakdown by institution is not yet available for publication but shows that results have remained comparable to previous years despite the changes to the assessment system. The Council’s State of the City Report 2020<sup>3</sup> shows that A Level entries in Manchester has risen from 5,935 in 2011/2012 to 8,310 in 2018/19. It also shows that results at grades A\*- E have remained stable and in line with rates across England: in Manchester 98.9% achieved A\*- E grades in 2011/2012, this fluctuates slightly

<sup>2</sup> <https://www.resolutionfoundation.org/publications/class-of-2020>

<sup>3</sup>

file:///mcc.local/users\$/002/turnerli/Downloads/sotc2020\_chapter3\_a\_highly\_skilled\_city\_web\_\_1\_.pdf

across the years to 97.4% in 2018/2019 and compares with English results of 98.6% in 2011/2012 and 97.3% in 2018/2019.

### **5.3 Higher education admissions**

- 5.4 Despite initial concerns about transition to higher education arising from closures in education in March 2020, UCAS applications for September 2020 starts reached a record high nationally and as a result, admissions were strong nationally. 2020/2021 UoM admissions are outlined in section nine of this report. However, an increase in deferral rates was also evident as some students chose to sit out the worst of COVID-19 restrictions, changes to students experience and online learning notwithstanding young people and families who had been adversely affected by the pandemic. Intelligence from Manchester's HE sector indicates some emerging trends in course selection and student demographics including an increase in demand and applications to health and care courses.
- 5.5 The increase in applications and admissions for HE study seen in 2020/2021 appears to have continued. Official admissions data for the academic year 2021/2022 is not yet published but the sector reports that planned numbers were met with increases in home undergraduate students. Sectoral indications based on 2022 application data also show strong levels of applications to HEIs in the city suggest that applications for 2022/2023 admission have increased again. This could be attributed to perceived adverse labour market issues brought about by COVID-19, as higher education becomes an attractive option to a higher than average number of young people as they attempt to ride out the worst of the economic downturn. A decrease in apprenticeship opportunities for school leavers has also impacted upon HE participation rates. HEIs, Higher Education Statistics Agency (HESA) and other relevant government departments, will be monitoring this emerging situation closely in order to respond to any long-term changes in HE student numbers emerging from the pandemic.

## **6.0 Higher Education attainment**

- 6.1 As evidenced in this report with HESA and institutional data analysis, the outbreak of the COVID-19 pandemic did not have any notable impact on student enrolment figures for 2019/20 but did have an impact on qualifications awarded. Despite a growth in the overall number of first year students in preceding years, there was a decrease in the number of qualifications obtained nationally at all levels of HE study for the 2019/20 academic year. HESA suggest that some of this decrease can be explained by significant numbers of qualifications awarded this year not being reported, likely to be linked to the impact on examinations and awards resulting from the COVID-19 pandemic.

### **6.2 Degree Apprenticeships**

- 6.3 Degree level technical training opportunities and apprenticeships provide an alternative pathway to traditional higher education academic routes and

promote inclusion. MMU's high quality degree apprenticeship offer is highlighted in case study in the report *Contribution of Higher Education Institutes to Manchester's economy*. presented to today's committee.

According Office for National Statistics data there have been some changes in degree level apprenticeships awards in the last two years. In 2019/2020 there were 241 which increased to 284 starts in 2020/2021 at Level 6 and 7. There are more higher-level apprentice learners in Manchester than any other GM borough. The age group with the highest number of higher-level apprenticeship achievements (Level 4-7) in Manchester in 2020/2021 was 25+ (130 residents). In 2019-2020, this number was just 61. The age group 19-24 also followed this pattern of increases – in 2019/2020, there were 21 higher apprenticeship achievements, whilst in 2020/2021, there were 61. Collectively, Greater Manchester boroughs have seen a significant increase in the number of 25+ learners since 2019/20 - from 406 to 719. This could be a result of residents retraining due to COVID-19 related changes to in the labour market.

## **7.0 Manchester's higher education participation rates**

- 7.1 Ensuring equality of access to higher education via educational interventions is essential to extend economic opportunity to Manchester's young people, residents and communities. In recent years, participation rates in higher education have continued to grow nationally and progress has been made in ensuring that some of Manchester's most economically disadvantaged young people access the city's world-class HE offer. A number of widening participation initiatives at HEIs have supported the widening participation agenda.

## **7.2 Greater Manchester Higher**

- 7.3 The Office for Students (OfS) Uni-connect programme supports post-16 students through 29 local hub partnerships across England. The programme aims to increase the number of young people from underrepresented groups who progress to HE. The programme is currently funded until 2022. The services provide impartial advice and information nationally to 1,613 schools and colleges, reaching over 180,000 young people and their parents/carers. Each hub works with local universities and colleges to inspire young people with confidence to find an appropriate path to higher education.
- 7.4 At a local level, Greater Manchester Higher (GMH) is led by MMU in partnership with regional FE and HE providers. GMH offer mentoring projects, summer schools, campus visits, curriculum activities, industry insight programmes, 1-2-1 Information Advice and Guidance sessions, HE workshops and presentations. Throughout the pandemic, the programme of activity was moved online and was able to continue to engage young people, although digital exclusion impacted upon participation.
- 7.5 Since the start of the project in the academic year 2017/2018, Greater Manchester Higher has worked with 32 Manchester schools and colleges, with engagement numbers increasing year on year, notwithstanding a small decrease in 2020/2021 due to COVID-19 restrictions. Data provided by GMH

shows that in 2017/2018, 4745 of Manchester's learners were involved in the project, this had increased to 6509 in 2020/2021. To date, gender breakdown for participating learners in the academic 2020/2021 is 62% female and 38% male.

## **7.6 First Generation project**

7.7 MMU has been running the First Generation Scholarship Programme since 2017. The programme works with young people whose parents have no experience of higher education and supports students to maximise their potential and achieve their ambitions, reflecting the University's commitment to addressing the attainment gap and HE access for under-represented groups. The programme delivers practical support and application guidance to Year 12 and 13 students to help them access and transition to university. Participants who progress to MMU receive a bursary of £1000 in their first year, and continued support throughout their studies. In addition to providing a support network, mentorship and professional connections, the programme aims to give students self-belief, confidence and knowledge.

7.8 First Generation aims to support 1,000 students into the University by 2025 and has welcomed 426 students to date. Of these 426, 148 (38%) are from Manchester, the highest percentage from the surrounding boroughs. The programme was initially aimed at students living or studying in Greater Manchester and has recently been extended to cover the Northwest as a whole. MMU evidence shows that students on the programme are progressing at higher rates when compared to other students. The first students to join the programme finished their studies in 2021, therefore destination outcomes will be reported in HESA Graduate Outcomes becomes available for this cohort in 2022.

7.9 The First Generation project is an official referral partner to We Love Manchester's Rising Stars Fund that aims to financially support talented young Mancunians to progress in education, employment or training where finances are a barrier to progression. To date, there have been six applications and three awards successfully granted.

## **7.10 UoM widening participation**

7.11 Manchester University reports that it is in the top quintile of Russell Group Universities for the number of students from areas of low HE participation and low socio-economic groups and. The University also cite that they have one of the highest numbers of students from low-income households (less than £25,000) in the English Russell Group with approximately one third of all students receiving financial support through means tested bursaries. UoM's Manchester Access Programme offer is highlighted in *Contribution of Higher Education Institutes to Manchester's economy*. In addition, UoM has a significant commitment to racial equality in terms of: black students' admissions, funding, attainment and learning experience; black staff recruitment, progression, pay and employment experience and how black lives are represented in the University's history and heritage.

## **8.0 Manchester's HE sectoral intelligence**

- 8.1 Manchester's HE institutions attract different demographics. Most students studying at the University of Manchester come from outside the region, with only 27% from within the Northwest region. A considerable proportion of students studying at MMU originate from the Greater Manchester or Northwest region. In addition, MMU welcomes a substantial number of mature students. These differences in demographics affects how careers and graduate employment choices are made and the support provided by the institution e.g. UoM remains one of the most targeted HE institutions in the country, with large national and global corporations actively working with the careers service to attract their graduates. This leads to a level of mobility for this cohort. In contrast, significant numbers of MMU students have additional responsibilities such as caring responsibilities and related financial responsibilities. As a highly selective university, there is also a higher proportion of students from more affluent backgrounds at UoM, which has an impact upon their professional networks and related employment opportunities. Student population at UoM and MMU will be looked at detail in section 9 of this report and destination data in section 10.

## **8.2 Royal Northern College of Music**

- 8.3 According to institutional data provided in October 2020<sup>1</sup>, Royal Northern College of Music (RNCM) currently has 890 students studying across its portfolio of undergraduate and postgraduate (taught and research) programmes in music/popular music. RNCM has an outstanding world class reputation, and these students are recruited from 55 countries across the world: 625 of these are from the UK and 283 from the EU and other international countries. For the 2021/2022 academic year, a small number of students have requested to study online due to travel restrictions and related costs, however the vast majority of RNCM overseas students have arrived in Manchester to commence their studies in person.
- 8.4 RNCM report that recruitment for 2021/22 entry has remained stable and broadly in line with previous years, although EU numbers have reduced by approximately 50% due to Brexit. Due to the specialist and intensive nature of conservatoire recruitment and training, RNCM do not provide places via the clearing process. The atypical financial model and estate constraints also present limitations in expanding overall student numbers at RNCM.
- 8.5 As a specialist provider, graduation outcomes from RNCM are unique, RNCM report that their graduate destination survey outcomes over the last 3 years have recorded 100% of students progressing to further study or graduate careers paths within 6 months of graduation, with 87% or above working primarily in music. The pandemic, combined with Brexit, have had a significantly negative impact on the UK music industry and uncertainty around recovery remains. As such, an increase in post graduate study is anticipated by RNCA for 2021/2022. The sector remains hopeful that previous levels of employment will be recovered over the coming few years.

- 8.6 As RNCM students were unable to pursue live ensemble activity throughout lockdown, students were supported to acquire a wide range of digital skills to create, capture and share work online in new and innovative ways. This has opened up new forms of employment for many, as students and graduates establish their own online businesses as artists, music educators, community musicians and artist managers working on the international stage. RNCM staff are positive about this development and the possibilities digital opportunities can bring for its graduate to support lifelong careers in music.

## **8.7 UCEN**

- 8.8 UCEN Manchester is the HE arm of LTE The Manchester College and delivers a small volume of post-18 education with over 1,300 higher-education students enrolling every year since it officially launched as distinct from The Manchester College in January 2018. The role of FE higher education provision in reaching non-traditional academic students, and more economically disadvantaged students is an important part of developing a more inclusive education system, economy and place via an offer of Foundation Degrees and Higher National Diplomas on offer. UCEN Manchester report that approximately half their intake each year are on Level 3 access to HE courses and the other half on 3-year undergraduate degrees. UCEN Manchester have a creative arts and performance specialism for undergraduate students and a more vocational offer for access students including computing, health and social care, sport and public services.
- 8.9 UCEN Manchester has a high proportion of students recruited from low HE participation areas and students from low socio-economic backgrounds with any students receiving means-tested bursaries to support their study. In addition, the fees are lower than the full £9,250 charged by many HE providers at either £8,900 or £7,200 per year dependant on curriculum area.
- 8.10 Graduate destinations at UCEN Manchester are unique in that many students progress onto further HE studies with the provider, and many progress to local institutions including MMU and University of Salford to continue with vocational courses such as Business and Nursing respectively. In addition, many students who have completed creative course move into free-lance employment in the creative and culture industries.
- 8.11 Currently UCEN Manchester's HE offer is spilt across 3 sites in Openshaw, Fielden and Nicholls. In September the facilities will be enhanced by the City Centre campus currently under construction at Ducie St and will include a dedicated HE centre. This resource is expected to increase the capacity of HE students. As a small provider, the student experience is different to at a large HE institution with significantly smaller class sizes and more bespoke student support. In 2021 UCEN Manchester won the Whatuni Student Choice Award for Best Student Support.

## 9.0 Manchester's HE student population 2016 –2020

- 9.1 With the 18+ population set to rise nationally in the next decade, and the potential for increases in undergraduates and graduates in the city, there are considerations for the city, particularly neighbourhoods with increasing student populations, and for the business community. As such, ongoing collaboration with the HE sector will continue to be an important part of effective labour market recovery planning.
- 9.2 HESA data analysis shows that Manchester's student population in recent years has remained relatively stable. According to Office for National Statistics data for 2019/20, the overall number of students living in Manchester during term-time has remained stable with some marginal changes seen with some cohorts. The number of undergraduates decreased 2% year-on-year in 2019/20, whilst the number of postgraduates living in Manchester grew by 6%. According to HESA, the number of postgraduates on taught courses grew by 10% nationally between 2018/9 and 2019/20 largely due to an increase in enrolments from non-European Union (non-EU) students.
- 9.3 The data in Table 1, 2 and 3 has been provided by the UoM's data team and has been calculated on the annual census date each year of 1st December. UoM is made of three faculty's: Faculty of Biology, Medicine and Health; Faculty of Humanities' Faculty of Science and Engineering.<sup>3</sup> The following table shows the split of students across each of the three schools and the schools within the faculty. The data refers to students based at the main campus and do not include students enrolled at the University's International centres or distance learning students.
- 9.4 Table 1 shows that in terms of student numbers, the Faculty of Humanities is consistently the largest school. Table 1 shows the split of students by faculty and total numbers by year.

Table 1

<b>Year of Study</b>	<b>Faculty of Biology, Medicine &amp; Health</b>	<b>Faculty of Humanities</b>	<b>Faculty of Science&amp; Engineering</b>
2016/2017	11,270	17,255	12,165
2017/2018	11,460	16,635	12,155
2018/2019	11,505	16,570	12,150
2019/2020	11,715	16,970	11,975
2020/2021	12,240	19,465	12,650

- 9.5 Table 2 shows that the biggest change in home student numbers in the last 5 years has been during the pandemic. The largest gender difference is also recorded for the academic year 2020/2021 with totals numbers currently showing 24, 975 female students compared to 19,380 male students. This compares with 21,765 female and 18,925 for academic year 2016/17. School of Engineering is the only faculty where male student numbers are consistently higher than female students. Table 2 shows that the number of

EU and international students has risen year on year since 2016/17, with the largest increase arising during the pandemic. The data evidences that international students' enrolments also remained strong and increased as per the previous trend in 2020 and 2021. The largest proportion of international students are undertaking courses with the Faculty of Humanities.

Table 2

<b>Year of Study</b>	<b>Home (UK) Students</b>	<b>EU Students</b>	<b>International Students</b>
2016/2017	26,615	2,710	11,365
2017/2018	25,855	2,880	11,515
2018/2019	25,100	3,035	12,085
2019/2020	24,575	3,115	12,965
2020/2021	26,260	3,220	14,880

- 9.6 Table 3 shows the breakdown of new entrants by level of study studying at UoM throughout the last 5 academic years. The table shows that undergraduates are the largest group, closely followed by students undertaking taught post graduate courses. The largest jump seen throughout the pandemic was to undergraduate students with students on postgraduate and post graduate research courses remaining comparable to the previous 5 years.

Table 3

<b>Year of Study</b>	<b>Undergraduate</b>	<b>Post Graduate (Taught e.g. Masters)</b>	<b>Post Graduate (Research e.g. PhD)</b>
2016/2017	8,535	7,380	1,150
2017/2018	8,150	7,065	1,325
2018/2019	8,100	7,710	1,255
2019/2020	8,425	8,375	1,195
2020/2021	10,005	9,770	1,050

Source HESA

- 9.7 HESA data shows that at both MMU and UoM, the number of female students has been higher than the number of male students. At MMU in the academic year 2015-2016, there were 18,890 female students and 13,600 male students. By 2019-2020 there were 19,470 female students and 13,940 male students. At UoM in the academic year 2015-2016, there were 21,020 female students and 18,685 male students. By 2019-2020 there were 22,350 female students and 18,135 male students.
- 9.8 MMU's student numbers has marginally in the academic years 2016/2017 - 2019/2020. Table 4 shows a breakdown of students by domicile and highlights that MMU recruits predominantly from the UK.



Table 4

<b>Year of Study</b>	<b>Home (UK) Students</b>	<b>Non-UK Students</b>	<b>Total Number of Students</b>
2016/2017	30,620	2,390	33,010
2017/2018	30,615	2,470	33,080
2018/2019	30,450	2,600	33,050
2019/2020	30,670	2,750	33,420

Source HESA

- 9.9 Table 5 shows the breakdown of MMU students by level of study and highlights the differences in numbers of UG and PGs students between MMU and UoM, with MMU significantly higher numbers of UG students and significantly less students studying for postgraduate qualifications.

Table 5

<b>Year of Study</b>	<b>Undergraduate</b>	<b>Post Graduate (Taught e.g. Masters)</b>	<b>Post Graduate (Research e.g. PhD)</b>
2016/2017	26,775	5,540	695
2017/2018	26,605	5,710	765
2018/2019	26,315	5,980	755
2019/2020	26,435	6,295	690

Source HESA

## 10.0 Graduate Destinations

- 10.1 The Office for National Statistics defines graduate employment as those occupations that normally require knowledge and skills developed on a three-year university degree to enable the competent performance of tasks. The definition of a graduate role is likely to change as industries develop and employers work to meet the skills demand of their changing workforce. For example, many highly skilled sectors and jobs are diversifying their routes into employment by offering higher and degree level apprenticeships or even graduate apprenticeships. As such, the pathways into graduate employment are becoming increasingly varied.
- 10.2 The graduate talent pipeline in the city falls into four broad categories:
1. Manchester, or Greater Manchester, students who remain in the city to study and remain to enter the labour market post-graduation.
  2. Students from Manchester who study outside of the city and return post-graduation.
  3. Students who come to Manchester from other areas who remain post-graduation.
  4. Graduates who have not studied in Manchester but move here post-graduation, attracted by the employment opportunities and city offer.
- 10.3 Graduates, and employees more widely, now have more flexibility with the potential to work remotely from other locations and/or for businesses based outside of Manchester. These changes also bring increased competition from

graduates from other universities. Despite this, Manchester's city centre housing, leisure, culture, and sporting offers remain attractive options for young people leaving university in the city and beyond. The true impact of the shift to hybrid and remote working on graduate retention and employment in the city remains to be seen and may require new approaches to talent attraction and development by employers.

- 10.4 The HESA Graduate Outcome survey now focuses on the work location of graduates 15 months after graduating, prior to 2019 this data was reported at 6 months following graduation. As such data for 2020 graduate destinations will be publicly available in summer 2022. This increased data lag has presented a particular issue throughout the pandemic, in terms of having timely intelligence available to provide a localised response. Again, ongoing collaboration with the sector will support in providing data and intelligence to meet skills demands across the city.

### 10.5 Local and regional HESA Graduate Destination data

- 10.6 Taken from the HESA Graduate Outcomes Survey, Table 7 shows that the proportion of graduates indigenous to Manchester who entered work in the city within 15 months of graduating in 2018/19 academic year was 23%, with a further 13% working elsewhere in the Greater Manchester region. This represents a slight increase on the previous year's graduate cohort, when 20% were working in the city 15 months after graduating. Relatively large proportions of graduates indigenous to Manchester also remain in the wider north west region outside of Manchester and Greater Manchester.

Location of employment	Academic year 2017/18	Academic year 2018/19
Manchester	20%	23%
Greater Manchester (excluding Manchester)	13%	13%
Greater Manchester	33%	36%
North west (excluding Greater Manchester)	32%	39%
UK (excluding north west)	32%	22%
Non-UK	3%	2%

Source HESA

- 10.7 Table 7 shows HESA data shows comparison to earlier years and evidences the increase in graduate retention in Manchester and the wider Greater Manchester and Northwest region as a whole in the years 2010 – 2016.

	Year					
Location	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
Manchester	27%	28%	41%	39%	40%	42%
GM excl Ma n	45%	41%	31%	31%	32%	29%
GM	72%	69%	72%	70%	71%	71%
NW excl G M	7%	8%	7%	7%	8%	9%
UK excl N W	18%	21%	19%	20%	18%	18%
Non-UK	2%	2%	2%	3%	3%	2%

Source HESA

- 10.8 This increase in graduate attraction, retention and therefore skills and talent in Manchester has driven growth in the city's population, as graduates are attracted by the educational, employment, cultural, and sporting offer. Pre COVID-19 projection figures estimated that city centre living would reach 100,000 by 2025 representing a seismic shift in the last 20 years. In turn, this population growth has stimulated further growth in key sectors and development in new and emerging alternative sectors. In 2020, HEIs were reporting significant disruption to labour market offers for their 2020 leavers. However, indications now show that the graduate recruitment market is recovering to pre-pandemic levels.

## 11.0 Manchester's Graduate Labour Market

- 11.1 Centre for Cities research <sup>4</sup>shows that Manchester, and other UK Core Cities still experience the 'brain drain' and fall behind London for graduate, and highly skilled, talent retention and attraction. However, as an international city Manchester also benefits from the 'brain gain' experienced when highly skilled and professionals move to Manchester from international countries for employment opportunities.
- 11.2 COVID-19 has had a significant impact on skills supply and demand and has brought some structural changes in the labour market and the speed of change has accelerated due to automation and digitalisation. Nationally the UK faces skills shortages that particularly impact upon higher skilled and technical roles. Despite the relatively high and increasing number of graduates in the city, the strong post-16 offer within the city and initiatives to address specific skills gaps this trend is replicated across the city. In addition, the speed of growth and diversification of Manchester's economy has created challenges in meeting demand with the greatest impact felt in growth sectors

<sup>4</sup> <https://www.centreforcities.org/reader/great-british-brain-drain>

and higher skilled occupations such as financial and professional, managerial and professional, digital and creative roles. The Council's September 2021 Economy Dashboard Data shows that in one week in July 2021, there were 9,000 jobs posted across Greater Manchester, the highest number in 3 years. New HE provision can go some way to address the skills shortages in the city's growth sectors e.g., MMU School of Digital Art (SODA) opened for first cohort of HE students in September 2021, SODA also launched the UK's first Digital UX Degree Apprenticeship in September 2020.

- 11.3 A widening of the travel to work area has brought greater labour market competition which has the potential to impact significantly upon the graduate talent pipeline in the city with graduates from further afield being able to more readily access the city's employment offer. With remote and hybrid models of working becoming more common place, graduates from universities in cities and regions, e.g. Chester, Staffordshire, West Yorkshire, with less graduate opportunities may have the ability to work for a Manchester based business. Conversely, this could increase the gap in resident and employee wages.

#### **11.4 Talent and diversity**

- 11.5 Despite ongoing work to improve diversity and inclusion, differentials between workforce make up in key and growth sectors continue particularly in the digital and construction and engineering sectors. The digital sector is expanding almost three times faster than the rest of the UK economy and it is estimated to be worth approx. £184bn. However, diversity remains a key challenge as only 15% of the tech workforce are from Black Asian Minority and Ethnic backgrounds and gender diversity is currently sitting at 19% compared to 49% in other sectors. The benefits of diversity can only be achieved when work environments are inclusive. Research undertaken by Leeds Racial Diversity in Digital highlights<sup>3</sup> that ethnically diverse, inclusive

#### **CASE STUDY: The Hut Group**

Since 2018 the Work and Skills team has worked closely with The Hut Group (THG) to support the development of their Airport City sites, which includes a commitment to recruiting graduate talent in Manchester. In 2020 THG set a target to recruit 600 graduates by 2022. Working with THG to forge and build relationships with universities, in addition to supporting the promotion of opportunities available within Airport City has enabled THG to recruit just under 500 graduates by June 2021. The majority of these graduates originate from Manchester. The graduates are working across a range of areas within THG, from digital and creative, to HR, leadership and multi-lingual roles. Work continues with THG to forward plan for graduate recruitment as their flagship THQ and Icon sites develop over the coming years.

#### **12.0 Overview of specific initiatives**

- 12.1 The Council's Work and Skills Team works with employers and businesses across the city to support a needs led response to skills supply and demand issues, with some initiatives designed to support the graduate market

specifically. As the graduate talent pipeline makes a significant contribution to supporting skills demand and will play an integral part of the city's economic recovery, throughout COVID-19 response and recovery planning, there has been an increased focus on supporting the graduate labour market.

## **12.2 Graduates for Greater Manchester**

- 12.3 Findings in the 2021 CBI 2021 Skills Survey <sup>5</sup> highlights that developing workforce industry-specific technical knowledge (60%), leadership & management (58%) and advanced digital skills (44%) are top priorities for businesses. This builds on business intelligence over a number of years with employers are reporting that analytical, negotiation, critical thinking and interpersonal skills are becoming more important for their business and that they can struggle to find candidates with these skills. The OfS funded initiative Graduates for Greater Manchester was established at UoM and MMU to upskill undergraduates from degree disciplines with higher levels of underemployment and to support them to consider and develop skills required in large and growth sectors.
- 12.4 An evaluation of the programme carried out by the MMU's Decent Work and Productivity Centre has shown that: students reported considerable improvements in their feelings of career self-efficacy; students reported improvements in specific digital skills and growing confidence and awareness, more digitally oriented students found the projects to be a valuable stepping stone in building their skill set and stimulating further interest in training and development.

## **12.5 Our Manchester Graduate Scheme**

- 12.6 The Our Manchester Graduate Scheme is a pilot collaborative initiative between the Council and MMU aiming to connect small and medium-sized enterprises (SMEs) to recent graduates. The businesses will be supported with funding, candidate attraction, recruitment, and selection carried out by MMU. The business will offer a 12-month graduate opportunity with the potential for the role to become permanent. Upon starting in the role, the graduate will have access to regular CPD (Continuing Professional Development) training provided by the council's HR department. The scheme launched in August 2021 and is currently at the stage of recruiting businesses with nine SMEs interested to date.

## **13.0 Next Steps**

- 13.1 The Work and Skills Strategy 2016-2021 is currently being refreshed. One of the previous Strategy's objectives was retaining graduates in the city. This supports the *Our Manchester Strategy – Forward to 2025* priorities of creating 'a highly skilled city' and of 'home-grown talent sustaining the city's economic success.' The refreshed strategy, due to be published in 2022, will build on the success of the previous strategy whilst considering the strategic and policy

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<sup>5</sup> <https://www.cbi.org.uk/articles/skills-for-an-inclusive-economy-cbibirkbeck-education-and-skills-survey-2021>

contexts including the impacts of COVID-19, Brexit and the ensuing structural changes in the economy. Engagement with undergraduate and post graduate student, recent graduates and HE staff will form an integral part of the Strategy refresh process and can be supported by improved partnerships with HEIs fostered throughout COVID-19 response and economic recovery planning. Building upon the opportunities presented by the pandemic with continued collaboration at a local level, and increased data and intelligence sharing capability will be critical to support supply and demand issues in the graduate and wider labour market.

- 13.2 Continued development, regeneration and economic diversification are critical to achieving a thriving, sustainable and inclusive economy and will be increasingly important in the recovery from COVID-19. Achieving our equality inclusive economy aims will only be possible with the continued support of HEIs and businesses to recognise and value diversity and nature potential and talent, recognising that some students and early career employees will need additional support. The challenge facing Manchester, its HEIs and its businesses will be to respond to new patterns of study and work and ensure that the city remains competitive and attractive to prospective businesses, students, and graduates alike. The challenge and opportunity for the education and training system will also be in responding at pace and scale to opportunities presented by the emerging and growing sectors such as: zero carbon and greening of the economy; research and business; financial and professional services; creative and digital; cyber, fintech, bioscience; advanced material and research and development.
- 13.3 Building upon the success of widening participation initiatives will be essential to ensure a pipeline of home-grown talent and that Manchester's young people have attractive and accessible routes to HE and high-quality technical pathways, including financial, pastoral and careers support when it is needed. Equity for the city's more deprived young people and parity between academic and technical pathways will be essential to nurture home grown talent, work towards a more inclusive economy, and in meeting the skills needs of businesses in coming years.

## **14.0 Conclusion**

- 14.1 The HE response to COVID-19 and resilience shown across the HEIs has ensured that Manchester remains a university city of choice Manchester remains an attractive city for undergraduate, graduates and post-graduate students due to the renowned and outstanding education and world class opportunities available to students, and the wider city offer. This reputation for excellence is bolstered by the global reputation and the international student body that come to study, live and work in the city. The strength, resilience and diverse labour market has also ensured that talent remains in the city and city region, and that graduates from institutions from outside the city, and city region are attracted to Manchester as a viable alternative to London.

## Manchester City Council Report for Information

**Report to:** Economy Scrutiny Committee – 11 November 2021

**Subject:** Update on COVID-19 Activity

**Report of:** Director of City Centre Growth and Infrastructure and Director of Inclusive Economy

### Summary

This report provides Committee Members with a further update summary of the current situation in the city in relation to COVID-19 and an update on the work progressing in Manchester in relation to areas within the remit of this Committee. Further detail on specific issues will be available as required.

### Recommendations

The Committee is requested to note the update.

### Wards Affected: All

<b>Environmental Impact Assessment</b> - the impact of the issues addressed in this report on achieving the zero-carbon target for the city

Manchester Strategy Outcomes	Summary of how this report aligns to the OMS
A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities	<p>This unprecedented national and international crisis impacts on all areas of our city. The 'Our Manchester' approach has underpinned the planning and delivery of our response, working in partnership and identifying innovative ways to continue to deliver services and to establish new services as quickly as possible to support the most vulnerable in our city.</p> <p>A reset of the Our Manchester Strategy is now underway following a meeting of the Our</p>
A highly skilled city: world class and home grown talent sustaining the city's economic success	

A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	Manchester Forum on 16 June 2020. An extensive engagement exercise will take place to inform a draft document in late 2020 and a final version in February 2021.
A liveable and low carbon city: a destination of choice to live, visit, work	
A connected city: world class infrastructure and connectivity to drive growth	

**Contact Officers:****Name:** Pat Bartoli**Position:** Director of City Centre Growth and Infrastructure**Telephone:** 0161 234 3329**Email:** pat.bartoli@manchester.gov.uk**Name:** Angela Harrington**Position:** Director of Inclusive Economy**Telephone:** 0161 234 3171**Email:** angela.harrington@manchester.gov.uk**Name:** Hilary Sayers**Position:** City Centre Growth Manager**Telephone:** 0161 234 3387**Email:** hilary.sayers@manchester.gov.uk**Background documents (available for public inspection):**

None



## Economic Recovery Workstream- Sitrep Summary

As at 28/10/2021 for meeting on 29/10/2021. Updated fortnightly. Latest updates shown in yellow.

Issue/theme/activity area	Impact/ challenges experienced	Key planning and response activity being undertaken
General Overview	<p><b>ONS National Indicators 21<sup>st</sup> October</b></p> <ul style="list-style-type: none"> <li>The total volume of online job adverts on 15 October 2021 grew by 2% from the previous week, to 143% of its February 2020 average level; the "transport, logistics and warehouse" category is now more than four times as high as its February 2020 average level (Adzuna).</li> <li>Transactions at Pret A Manger stores increased in all regions and transport locations except Manchester and Scotland in the week to 14 October 2021 (Pret A Manger).</li> <li>The system average price (SAP) of gas decreased by 6% in the week to 17 October 2021; this was the first weekly fall in 13 weeks (National Grid).</li> <li>Almost one in six businesses (16%) intend to use increased homeworking as a permanent business model going forward, with the main reasons for this being improved staff well-being, reduced overheads and increased productivity (Business Insights and Conditions Survey (BICS)). The surveyed businesses ranged from SME to larger businesses and was a representative sample.</li> </ul>	<p><b>Powering Recovery: Manchester's Recovery and Investment Plan'</b> launched in Nov. Four investment priorities around: innovation; city centre and urban realm; residential retrofit programme; and North Manchester regeneration. Seeking govt funding for over 50 projects of £798.8 m. The plan can be accessed <a href="#">here</a>.</p> <p><b>United City</b> business-led campaign launched 22/11 and supported by MCC.</p> <p><b>Business Sounding Board</b> and <b>Real Estate subgroup</b> continue to meet regularly to share intel across sectors and to help support MCC lobbying.</p> <p>Weekly MCC <b>newsletter</b> issued to over 9,000 businesses with updates.</p> <p><b>Comms update</b></p> <p>Link to the film: <a href="#">Manchester is back. Stronger than ever. - YouTube</a></p> <p>The film performed most well on Twitter with over 100k impressions, 13k view of the video and over 300 likes. Our Twitter followers tend to include partners and well as residents and businesses. It also did well on LinkedIn with 7k views and 367 likes.</p>

	<ul style="list-style-type: none"> <li>• The seven-day average estimate of UK seated diners in the week to 18 October 2021 was 119% of the level in the equivalent week of 2019; the corresponding figure for Manchester and London were 121% and 86%, respectively (OpenTable).</li> <li>• The seven-day average number of UK daily flights was 3,625 in the week ending 17 October 2021, this was 59% of the level seen in the equivalent week of 2019; the highest this figure has been since the first UK wide lockdown (EUROCONTROL).</li> </ul> <p><b>Government unveils net zero plan (19 October):</b> the Government has published its long-awaited <a href="#">Net Zero Strategy</a>, alongside the <a href="#">Heat and Buildings Strategy</a>, with its commitment to ban the sale of new petrol and diesel cars and vans by 2030, decarbonising the electricity supply, investment in hydrogen production, aim to have 10% sustainable aviation fuel by 2030, £2bn investment to help half of journeys in towns and cities to be cycled or walked by 2030, and grants for upgrade gas boilers to heat pumps.</p> <p><b>Roadmap for green financial systems (18 October):</b> the Chancellor has unveiled a roadmap for the Government's ambitions to green the financial system. It introduced Sustainability Disclosure Requirements which would mean that every investment product would have to set out the environmental impact of the activities it finances and justify clearly any sustainability claims it</p>	<p>The Welcome Back campaign moved into the next phase of lockdown messaging from the 17th May with emphasis on culture venues opening back up. We produced another film with the Contact Theatre on what opening up meant to them and how important it is to support our cultural venues. <a href="#">Manchester art &amp; entertainment venues are opening 🎨 #WelcomeBackMCR - YouTube</a></p> <p>Alongside this, visitors to the city will see a raft of Welcome Back messaging from outdoor digital advertising, poster sites, shop windows and in taxis to name a few.</p> <p>The weekly Welcome Back ebulletin signposts to the events taking place, such as the flower show, along side key advice to ask that people continue to follow the advice and guidance so we can all return safely.</p> <p><b>Re-opening update</b></p> <p>c. 400 licences have been issued to the hospitality sector. Overall businesses have responded to all requirements positively, have engaged with authorities and are overwhelmingly compliant. However the impact does continue to be significant for them. The delayed lifting only delays their recovery and makes for continued higher operational costs. More widely than that because as a sector they are required to record customer contacts in a way that other sectors are not required to (retail/transport for example), they are harder hit when an individual tests positive – and isolations/temporary closures are required that are not mirrored in the retail sector.</p> <p>There has been a shift in employment within the sector as already reported, with many leaving it altogether and there is a real shortage of staff at the minute that is compounding all the aforementioned issues meaning some businesses also have to shut due to staff shortages.</p>
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	<p>makes. The <a href="#">Greening Finance: A Roadmap to Sustainable Investing</a> is available to read.</p> <p><b>Inflation dips slightly: latest ONS data has shown that inflation</b> was at 3.1% for September, down on 3.2% in August. The ONS said that this was because prices in restaurants rose less in August than last year when the Eat Out to Help Out scheme was operating. Industry is expecting further price increases due to rising energy costs, supply chain disruption and the withdrawal of VAT reductions for the hospitality industry.</p> <p><b>Consumer confidence down:</b> the <a href="#">GfK Consumer Confidence survey</a> has put consumer confidence in the UK at -17 for October, down four points on September. The survey found that households were less optimistic about their personal finances over the next year and were less likely to make any big purchases.</p> <p><b>Impact of VAT rise:</b> a VAT Survey undertaken by the <a href="#">Tourism Alliance, UKHospitality, BBPA and Alva</a>, shows that the current temporary reduced rate of VAT of 12.5% is a lifeline to many tourism and hospitality businesses, with funding being spent on keeping businesses afloat, complying with Covid requirements, and paying staff and suppliers. The findings show that reverting the VAT level to 20% could have serious consequences for businesses, with 4 in 10 saying it would likely lead to cutbacks and job losses</p> <p><b>Manchester office deals continue:</b> the <a href="#">Manchester Office Agents Forum report</a> that Q3 figures are significantly better for 2021 than they were for the same period in 2020. A total of 257,164sqft was transacted from July to September 2021, which is also 17% more than the</p>	<p><b>19<sup>th</sup> July-</b> Several city centre nightclubs did a NYE's style countdown and one venue had a full capacity ticketed queue of 800. Most nightclubs operating a tickets only entry. Of the 650 hospitality venues, almost all will be open by the coming week end ( only 6% were not operating in some form). Many night time venues had reinvented themselves during the pandemic to allow trading to continue and are now reverting back or upgrading to previous operating patterns.</p> <p>Prior to stage 4, additional opening and operating safely guidance has been issued to businesses and venues including for nightclubs and for weddings and funerals. Bulletins continue to encourage staff vaccination and regular use of Lateral Flow Tests with comms that protecting staff protects the business. The Licensing and Out of Hours Team is visiting all nightclub premises and engaging re risk assessments and now working until 04.30hrs; officers are also monitoring re noise levels ( particularly with current ventilation advice) and waste from external operations. 'Pinging' is having impact on hospitality staff and on waste and cleansing staff availability.</p> <p>14 September – temporary licences enabling use of outside space by hospitality will not be renewed in most cases over the winter. This will give the opportunity to look long term at use of space. Where licences are part of already approved schemes, these will continue. Comms going out this week.</p> <p>24 September – Christmas markets will return to the city centre for 2021. Piccadilly Gardens will be the site for an expanded 'winter gardens' featuring market stalls, lighting, food and drink, seating areas and entertainment space.</p> <p>12<sup>th</sup> October – security measures around the temporary outside space for hospitality will be removed 18/19<sup>th</sup> October. Consideration is being given to longer term options taking into account needs of all parties including residents and neighbouring businesses together with the city's overall objective to increase space available to pedestrians.</p>
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	deals done in Q2. The MOAF expects to see demand continue on this trajectory and for at least 1million sqft transacted overall in 2021. Significant transactions include 87,130sqft taken by games developer Cloud Imperium Games at the Manchester Goods Yard, Accenture taking 25,000sqft at Circle Square and Deliveroo taking 10,000sqft at 5 New York Street	
<b>Comprehensive Spending Review</b> <b>27.10.21</b>	<p><b>Economic overview:</b></p> <ul style="list-style-type: none"> <li>• In September, inflation was at 3.1% and predicted to rise to 4% over the next year</li> <li>• The OBR predicts that growth will be at 6.5% for this year and they then expect the economy to grow by 6% in 2022</li> <li>• The OBR predicted that unemployment would hit 12% but they have revised this to 5.2%</li> <li>• Wages have risen, compared to February 2020, in real terms by 3.5%</li> <li>• Borrowing as a percentage of GDP is expected to be 7.9% this year and then drop to 3.3% in 2022 and then 2.4% in 2023</li> </ul> <p><b>Housing</b></p> <ul style="list-style-type: none"> <li>• £11.5billion for up to 180,000 affordable homes, targeted on brownfield sites</li> <li>• Residential Property Developers Tax, which I can confirm will be levied on developers with profits over £25m at a rate of 4% (which will fund removal of cladding from high-risk buildings)</li> </ul> <p><b>Levelling Up</b></p>	

	<ul style="list-style-type: none"><li>• First allocation for the Levelling Up Fund (winning projects have been announced)</li><li>• First allocation for the Community Ownership Fund (none in Manchester)</li><li>• £5.7billion for English city regions over five years for upgrades to transport networks to create London-style integrated settlements</li><li>• £850million for museums, galleries, libraries, and local cultural venues</li><li>• £2.6billion for UK Shared Prosperity Fund</li></ul> <p>Transport, energy &amp; environment</p> <ul style="list-style-type: none"><li>• £6.1 billion to back the Transport Decarbonisation Plan</li><li>• Confirmed £1billion funding for Net Zero Innovation Portfolio</li><li>• £625 million for the Nature for Climate Fund</li><li>• £385 million Advanced Nuclear Fund</li></ul> <p>Businesses</p> <ul style="list-style-type: none"><li>• 25% increase investment into R&amp;D to £20million by 2024-2</li><li>• Temporary increase to the headline rates of tax relief for theatres, museums, orchestras and galleries to March 2024</li><li>• Alcohol duty rates simplified and a new Small Producer Relief and Draught Relief which will cut duty by 5%</li><li>• New 50% business rates discount for businesses in the retail, hospitality, and leisure sectors in England</li></ul>	
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	<ul style="list-style-type: none"><li>From 2023, businesses will be able to make property improvements and not pay extra business rates for 12 months</li><li>25% increase investment into R&amp;D to £20million by 2024-2 and changes to R&amp;D tax relief</li></ul> <p>Skills</p> <ul style="list-style-type: none"><li>Increase in skills spending by 42%</li><li>Launching UK-wide numeracy programme for adults called Multiply</li></ul>																												
Footfall	<p>Footfall trends- City Centre (Springboard / CityCo)</p> <p>Week 42 17<sup>th</sup> - 23<sup>rd</sup> October</p> <table><tr><th></th><th>Week on week %</th><th>Year on year %</th><th>Pre Covid</th></tr><tr><td>St Ann's Sq</td><td>-3.7%</td><td>52.5%</td><td>-35.6%</td></tr><tr><td>Exchange Sq</td><td>7.4%</td><td>43.7%</td><td>-24.1%</td></tr><tr><td>King Street</td><td>5.2%</td><td>25.0%</td><td>-42.2%</td></tr><tr><td>Market Street</td><td>-5.3%</td><td>50.2%</td><td>-28.6%</td></tr><tr><td>New Cathedral St</td><td>-8.9%</td><td>64.7%</td><td>-26.3%</td></tr></table> <p>Footfall trends- District Centres (Springboard)</p> <p>Week 42 18<sup>th</sup> -24<sup>th</sup> October</p> <table><tr><th></th><th>Week on week %</th><th>Year on year %</th></tr></table>		Week on week %	Year on year %	Pre Covid	St Ann's Sq	-3.7%	52.5%	-35.6%	Exchange Sq	7.4%	43.7%	-24.1%	King Street	5.2%	25.0%	-42.2%	Market Street	-5.3%	50.2%	-28.6%	New Cathedral St	-8.9%	64.7%	-26.3%		Week on week %	Year on year %	
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<b>Higher Education Institutions</b>	<p>MMU - Teaching on campus commenced, testing and vacs taking place on campus.</p> <p>RNCM - 90% students back, 10% still online due to Covid.</p> <p>UoM - have 2k more students in the first year intake than in previous years, but had anticipated and planned for this. MECD and the Royce Institute opened this Sept.</p> <p>UoM reported at BSB that:</p> <ul style="list-style-type: none"> <li>Student numbers remain high and are at 46,500 registered with a few still going through registration.</li> </ul>																															
<b>Aviation</b>	<p>From 4am Monday 4 October 2021, the rules for international travel to England will change from the red, amber, green traffic light system to a single red list of countries and simplified travel measures for arrivals from the rest of the world. The rules for travel from countries and territories not on the red list will depend on your vaccination status.</p>	<p>The 23/24 Oct weekend, the beginning of half term in many places, was Manchester's busiest weekend since March 2020, and we have seen an unprecedented increase in bookings for half term. This has been helped by the relaxed testing rules that came into effect from 24 October meaning fully vaccinated arrivals into the UK can avoid PCR tests and instead have a cheaper rapid lateral flow test on day 2.</p>																														

	<p>If you are <b>fully vaccinated</b> you will have to:</p> <ul style="list-style-type: none"> <li>• book and pay for a day 2 COVID-19 test – to be taken after arrival in England</li> <li>• complete your passenger locator form – any time in the 48 hours before you arrive in England</li> <li>• take a COVID-19 test on or before day 2 after you arrive in England</li> </ul> <p>Under the new rules, you will not need to:</p> <ul style="list-style-type: none"> <li>• take a pre-departure test</li> <li>• take a day 8 COVID-19 test</li> <li>• quarantine at home or in the place you are staying for 10 days after you arrive in England</li> </ul> <p>If you <b>are not fully vaccinated</b> from 4am Monday 4 October, you must:</p> <ul style="list-style-type: none"> <li>• take a pre-departure COVID-19 test – to be taken in the 3 days before you travel to England</li> <li>• book and pay for day 2 and day 8 COVID-19 tests – to be taken after arrival in England</li> <li>• complete your passenger locator form – any time in the 48 hours before you arrive in England</li> </ul> <p>After you arrive in England you must:</p> <ul style="list-style-type: none"> <li>• quarantine at home or in the place you are staying for 10 days</li> <li>• take a COVID-19 test on or before day 2 and on or after day 8</li> </ul>	<p>Nonetheless, there is still very significant nervousness towards international travel among customers, meaning passenger demand remains fragile. This is driven by a mixture of costs of travel, risk of rules being changed at short notice, and underlying fear of the personal risk of travel during the pandemic. Any negative announcements about travel policy / the safety of travel, and the continued lack of a roadmap for removing restrictions altogether, has the potential to weaken passenger demand recovery considerably.</p> <p>Recruitment lead times mean we are having to begin volume recruitment now to make sure we have enough staff to manage demand we hope to see next summer. We also know our on-airport partners (e.g. retail) are facing increased staffing costs because of wider pressures in the employment market.</p>
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	<ul style="list-style-type: none"> <li>You may be able to end quarantine early if you pay for a private COVID-19 test through the Test to Release scheme.</li> </ul>	
<b>Culture</b>	<p><b>Culture Recovery Fund</b>  <b>CRF Round 3 announced 25/6</b> for the cultural, heritage and creative sectors. £218.5 million will be available through the Culture Recovery Fund:</p> <ul style="list-style-type: none"> <li><u>ACE Emergency Resource Support</u> programme (now live) Application deadline is 14 October &amp; deadline to get permission to apply is 30 September.</li> <li><u>Culture Recovery Fund Round 3 Resource Grants</u> - Historic England &amp; National Lottery Heritage Fund are also delivering two further CRF funds (now live) a) Emergency Resource Support aims to provide emergency funding for organisations who are at imminent risk of failure (EOI by 30/9). b) the Continuity Support fund for those that have already received support from the CRF opened for applications 16/8 will close 29/10.</li> <li>Other CRF Funds now closed.</li> </ul> <p><b>The outcomes of applications to the fund are expected to be published by Friday, 29/10.</b></p> <p><b>ACE Capital Investment Fund</b>  £20m grants pot for England.</p> <ul style="list-style-type: none"> <li>Expressions of Interest by 26/10</li> </ul>	<p><b>Culture re-openings and key events</b></p> <p><b>Corridor of Light</b></p> <p>This major light-based festival took place 21-23/10 along the Oxford Road Corridor, under the name <i>"BRIGHT LIGHTS - Celebrating new ideas, innovation and creativity"</i></p> <p>Artworks includes a neon work atop Booth Street East Bridge, a projected poem travelling around different corridor sites, 'Stories under our Feet' projected text spilling out under benches around Central Library and an immersive sound and light installation at the Holy Name Church. Venues involved included Circle Square, Manchester Central, RNCM, HOME, The Whitworth, Bridgewater Hall, Manchester Poetry Library and SODA. The programme is accompanied by talks &amp; a wider hospitality offer across the area including at Hatch.</p> <p>Manchester Literature Festival took place live 9-17/10 and will run digitally 1-14 November.</p> <p><b>Contact</b></p> <p>Contact reopened fully to the public on 20/9 following its refurbishment and extension. Works completed early in the pandemic and first national lockdown and the venue has been open for participatory activities and talent development as restrictions have allowed.</p>

	<ul style="list-style-type: none"> <li>• Full applications can be submitted from 10/11 to 13/12.</li> <li>• The grant range is between £100,000 to £750,000. 5% match is required for grants up to £250,000 and 10% for grants above that. 50% of match must be cash. This capital scheme is the only one planned for 2021-24.</li> <li>•</li> </ul> <p><b>Officers are working with potential applicants to review the scheme and support applications</b></p> <p><b>Staffing</b></p> <p>Cultural partners are consistently reporting difficulties in recruiting staff especially in the hospitality related roles.</p>	<p><b>Music</b></p> <p>Classical music season opened last weekend: Halle Orchestra and BBC Philharmonic at BWH, Psappha at Halle St Michael's and Manchester Collective at Halle St Peter's. Chet's/Stoller Hall held their Medieval weekend.</p> <p><b>HOME</b></p> <p>HOME's new theatre production War of the World opened last week 22 September (first HOME production since lockdown).</p> <p><b>Manchester Museum - building closed</b></p> <p>Construction of the new and South Asia Gallery and Exhibition Hall has been completed, and the Museum is now closed until late 2022 to allow for completion of redevelopment works.</p>
<b>Development</b>	<ul style="list-style-type: none"> <li>• <i>Continued development interest in the city for both commercial and residential scheme.</i></li> <li>• <i>All schemes are back on site, and construction levels increased since the beginning of the pandemic, although with some overall delays to programmes.</i></li> <li>• <i>Risks around supply chains/access to materials, with associated increases in costs.</i></li> <li>• <i>Access to finance for hotel and retail schemes likely to be more challenging.</i></li> <li>• <i>Economic Recovery &amp; Investment Plan identifies key schemes which can drive recovery and create new jobs. Ongoing</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Hana opens in Landmark:</b> <a href="#">Hana by Industrious St Peter's Square has opened its second space in Manchester</a>, bringing 32,000 sqft of flexible workspace to the market.</li> <li>• <b>Great Ancoats Street Residential Proposal:</b> developer Select Property Group is consulting on proposals for a 31 storey, 449-apartment development on the corner of Great Ancoats Street and Port Street. It is part of the Piccadilly Basin SRF area. The consultation closes on 27 October. The scheme will be BTR and operated/managed by Affinity Living, a wholly owned subsidier of Select Property Group.</li> <li>• <b>Funding agreed for Whitworth St tower:</b> Manchester Tower, next to the City Road Inn pub, will be a 327-apartment scheme over 35 floors. Planning permission for the scheme was originally given in 2015. It is for</li> </ul>

	<p>work to identify funding opportunities for schemes.</p> <ul style="list-style-type: none"> <li>• Long term impact on office demand being monitored on an ongoing basis, but positive indications from office agents and the Business Sounding Board, with recent reports of increased demand, especially for flexible, high quality office space.</li> </ul>	<p>completion in 2025. The scheme is a joint venture between Featherfoot Whitworth Street and Altrincham-based EGCC Group after it was acquired from Guernsey-based Brigantes.</p> <ul style="list-style-type: none"> <li>• <b>New flexible salon space opens:</b> Phenix Salon Suites have opened their first UK studio in Manchester, offering hair and beauty salon space, after taking 6,000 sqft of space in 1 Deansgate. 29 studios will be available to rent, with half said to be leased already.</li> <li>• <b>First at Mayfield:</b> the development is the first in the city to use 'concretene', a mix of concrete and graphene (which reduces the carbon footprint), for a mezzanine floor at Escape to Freight Island.</li> <li>• <b>Tower of Light switched on:</b> the architecturally designed tower, which is part of the Civic Quarter Heat Network, has been switched on. The network will go live in 2022.</li> <li>• The following schemes were approved at the <b>Planning &amp; Highways Committee on 21<sup>st</sup> October:</b></li> <li>• 155-bed hotel and 88-bed aparthotel on currently vacant land bound by Cornbrook Road, Chester Road and the Metrolink line.</li> <li>• Creation of a 31-bed homeless accommodation centre on the corner of Lord Street and Stocks Street (Cheetham). The centre will be managed by an experienced service provider.</li> <li>• Hawkins Brown have been selected as the architects for the Council's affordable housing scheme at Postal Street.</li> <li>• <b>Office lettings:</b> at Bauhaus on Quay Street, software company Connex One has taken 17,800sqft and flexible office firm NewFlex has taken 13,730sqft to offer workspace under its Bold brand. Charity Freedom From Torture has taken 5,000sqft at Chichester House on Moss Lane East. Real estate firm Pitalia Real Estate will move operations from Bolton to Manchester after acquiring the freehold of 24 Oxford Court.</li> <li>• <b>Airport warehouses planned:</b> three new units within the World Freight Terminal is being planned by Threadneedle</li> </ul>
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		<p>Curtis who own a five-acre site previously occupied by SkyChefs. The proposals would see the current site cleared and a total of 85,000sqft across the three units built on the site.</p> <ul style="list-style-type: none"> <li>• <b>CIS tower rebranded:</b> the 1960s office tower will be rebranded as '<b>Society</b>' once a multimillion-pound refurbishment scheme is completed. The tower will be split into three areas; Tower, Podium and Street, offering office workspace, and leisure and retail units on the street level.</li> </ul>
<b>Affordable Housing</b>	<ul style="list-style-type: none"> <li>• Risk to developer and investor confidence.</li> <li>• Working with RP's and other developers to understand current impact and forward plans.</li> <li>• Assessing sources and levels of investment, and any obstacles</li> <li>• Investigating grant funding, financial and other support needed to enable early start of key projects</li> <li>• Understanding supply chain issues and identifying appropriate support measures.</li> <li>• Developing guidance/share good practice for safe operation of sites</li> <li>• Expediting design &amp; planning phases of projects.</li> <li>• Risk of registered providers slowing down or pausing programmes to consolidate finances/liquidity</li> <li>• Ensure Zero Carbon and Fire safety provision are part of the programmes.</li> <li>• Potential flooding of the PRS sector as the short term let market shrinks.</li> </ul>	<p>Current forecasts suggest 497 new affordable homes will be built across Manchester in 2021-22 – 153 of which have already completed. This includes 278 social rent, 104 affordable rent, 113 shared ownership and 2 rent to buy homes.</p> <p>In addition, there are currently over 900 new affordable homes currently under construction across the city and expected to complete over the next few years. This includes a number of large-scale developments including the <b>Former Belle Vue Stadium Site</b> (130 affordable homes) and <b>Gorton Lane</b> (109 affordable homes) and 2 city centre schemes delivering Affordable Private Rent at <b>Swan Street</b> (19 homes) and <b>Addington Street</b> (50 homes).</p> <p>Feedback from MHPP Growth is suggesting that problems with supply chains for products and materials are beginning to impact on delivery timescales and costs</p> <p>Updates on further key schemes:</p> <ul style="list-style-type: none"> <li>• Planning has been approved for MCC's development of 69 social rent homes at <b>Silk Street</b></li> <li>• <b>Enabling works to facilitate the delivery of 130 new MCC social rent homes in Collyhurst are ongoing.</b></li> <li>• Alongside their purchase of the <b>Former Boddingtons Brewery Site</b>, Latimer - the development arm of Clarion – have acquired the final phase at <b>Islington Wharf</b> which will provide 54 shared ownership homes as part of a mixed tenure development</li> </ul>

		<ul style="list-style-type: none"> <li>• Great Places secured planning consent for 68 new affordable homes at <b>Downley Drive</b> and 39 new affordable homes at <b>Ancoats Dispensary</b> at July Planning Committee.</li> <li>• <b>Grey Mare Lane Estate</b> – One Manchester have started construction on the first two phases of the Estate Regeneration programme (Blackrock Street &amp; Windermere Close). The redevelopment is set to deliver c.290 new affordable homes (incl. 124 of reprovision) and the retrofit of <b>150</b> homes over the next 5 years. <b>A Master Plan will be submitted to the November meeting of the Executive.</b></li> </ul>
Transport and Infrastructure	<p><b>City Region Sustainable Transport Settlement</b></p> <p>The Government's budget has included £1.07bn in capital funding for transport infrastructure in Greater Manchester. This is the largest amount secured by any city-region and is the outcome of Greater Manchester's City Region Sustainable Transport Fund (CRSTS) bid, submitted to Government in September, equating to around 90% of our full proposal.</p> <p>The funding secured by Greater Manchester is for the five-year period 2022-23 to 2026-27 and will support the delivery the GM Five Year Transport Delivery Plan (2021-2026). This includes key investments for buses, trams, cycling and walking in the integrated Bee Network, and Greater Manchester's vision for a fully integrated 'London-style' public transport network. MCC officers will continue developing priority schemes in Manchester to ensure funds are able to be accessed and delivered when the funding period commences next year.</p>	<p><b>Summary of transport activity for week ending 17 October (GM-wide)</b></p> <ul style="list-style-type: none"> <li>• There were an estimated 51.6m trips made in Greater Manchester last week. This is consistent with the previous week and in line with the pre-pandemic average.</li> <li>• While weekday trips increased by 1%, weekend trips fell by 2% - as a result of fewer large-scale events than there were during the previous week.</li> <li>• Public transport trips followed a similar pattern: while they were 3% below the previous week overall, weekday demand was 1% above the previous week and weekend demand 11% lower.</li> <li>• Overall highway volumes remained consistent with the previous week.</li> <li>• Cycling volumes were 4% lower than the previous week, with a significant decrease in demand on Sunday. Workday trips were more consistent, increasing by 4% compared to the previous week.</li> <li>• <b>Regional centre:</b> During the week ending 17 October, the Regional Centre saw 2% fewer trips from the previous reporting week. This includes 2.8 million trips from GM and 1.0 million from outside of GM.</li> </ul>

	<p><b>UK Net Zero strategy</b></p> <p>On 19 October the government released its Net Zero Strategy, setting out more information about the UK's pathway to delivering on its commitment to reach net zero emissions by 2050. The Strategy set out transport commitments including further funding to support the electrification of vehicles, such as targeted grants for charging infrastructure. EV charging infrastructure is continuing to be rolled out in Greater Manchester through the GM EVCI Strategy adopted in September 2021, and MCC officers are actively feeding in TfGM-led programmes to deliver infrastructure where it is needed and aligning with our wider economic, environmental and social objectives for the city.</p>	<ul style="list-style-type: none"> <li>Trips from within GM (84%) to the Regional Centre continue to remain closer to pre-pandemic levels than trips from outside of GM (74%).</li> </ul> <p><b>Transport activity by mode (GM-wide)</b></p> <p><b>Bus (patronage):</b> -1% on previous week; -8% on pre-Covid levels. The busiest day was Thursday with 470,751 passengers.</p> <p><b>Metrolink (patronage):</b> -9.6% on previous week; -34% on pre-Covid levels. The busiest day was Wednesday with 103,541 passengers.</p> <p><b>Rail (passenger footfall Piccadilly):</b> -8% on previous week; -26% on pre-Covid levels. The busiest day was Saturday with 106,038 passengers.</p> <p><b>Highway (private vehicle trips):</b> no change on previous week; -1% on pre-Covid levels. The busiest day was Friday with 5,364,708 trips.</p> <p><b>Cycling (trips):</b> -4% on previous week; -12% on pre-Covid (2019). The busiest day was Tuesday with 141,941 trips.</p> <p><b>Walking (pedestrian footfall in Regional Centre):</b> -9% on previous week; -5% on pre-Covid levels. The busiest day was Sunday with 1,613,190 pedestrian trips.</p>
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<b>Skills, Labour Market and Business Support</b>	<p><b>Headlines include</b></p> <ul style="list-style-type: none"> <li>In September 2021 there were 29,205 claimants of unemployment benefits in Manchester – down from 30,500 in August. Unemployment for women is falling much faster than it is for men across (trend across GM). JCP continue to report that they have not seen a significant uptake in claims in October.</li> <li>The number of furloughed residents has continued to drop as COVID-19 restrictions on the economy have been lifted. 12,600 residents were furloughed on 31st August, down from 14,900 in June. The majority of residents that remain furloughed are employed in accommodation &amp; food services or wholesale &amp; retail. Final furlough figures available 4<sup>th</sup> November. There is no evidence, yet that formerly furloughed residents have moved onto UC, where the number of claimants has remained broadly stable at just under 80,000 since the start of the year.</li> <li>New national data shows that vacancies are at their highest point since the pandemic at 1.1m driven across all sectors with highest increases in hospitality.</li> </ul>	<p><b>Newly Unemployed Support</b></p> <ul style="list-style-type: none"> <li>New Mosely Street Jobcentre is now open supporting clients aged 24+ from Cheetham Hill, Rusholme, Newton Heath (these Jobcentres are focusing on 18-24 year olds).</li> <li>Employment partnership focus is on re-training and job matching as no significant increase in redundancy notices has taken place.</li> <li>Continue to work with several live and in development recruitment opportunities with business including Getir, BNY Mellon, Biffa, PWC, Boohoo.</li> <li>Progress continues to be made on Skills development and bounce back of the Cultural Sector with partners co-ordinating a response led by The Factory. Expected relaunch of Factory Consortium in the new year.</li> </ul>
	<p><b>Offer for 16-19 year olds</b></p> <p>October DfE submission – (as at August):</p> <ul style="list-style-type: none"> <li>the level of unknown has increased from 408 (3.4%) in July to 429 (3.6%) in August.</li> <li>NEET level has remained the same, at 4.0%</li> <li>the combined NEET and Unknown figures have slightly increased compared to the</li> </ul>	<p><b>Offer for 16-19 year olds</b></p> <p>Workshop held with the Digital Skills Network on the 20<sup>th</sup> October to review the offer for school, 16-19, and 19+ around digital in the City. Well attended face to face event showing continued strength of the Digital Skills Network in building pathways for young people in this sector.</p>

	<p>previous month. This has increased from 892 (7.4%) in July to 909 (7.6%) in August. This is lower than last year at 987 (8.7%).</p> <ul style="list-style-type: none"> <li>- There has been an increase in the numbers of young people in employment, going from 499 (4.1%) in July to 521 (4.3%) in August.</li> </ul> <p>September guarantee has increased to 79% from 67% at the same time this year – this means recorded on the CCIS system 79% of year 11's has a guaranteed offer of a post 16 destination.</p>	
<p><b>Youth unemployment</b></p> <p>Maximise the opportunities from and work with partners to roll out the Kickstart Scheme.</p> <p>Supporting youth employment programmes</p> <p>Developing a clear offer to support our graduates</p>	<p>MCC Kickstart opportunities – working with DWP to deliver an open day on 28<sup>th</sup> Oct at the new JCP office on Moseley Street.</p> <p>Supported DWP to deliver a 'Jobs Fest' event at Wythenshawe Forum on 22<sup>nd</sup> October.</p> <p>Connected PWC to Reform Radio. PWC are keen to provide work placements to young people through the Manchester Futures project.</p> <p>We have connected with University Academy 92. Exploring ways we can support their activities.</p>	
<p><b>Skills and employment support for adults</b></p> <p>Challenges -</p> <ul style="list-style-type: none"> <li>• Roll out of phase 2 of the MCC Digital Device Scheme – reaching groups</li> </ul>	<p>Get online week</p> <p>MAES, Libraries, the MCC Digital Inclusion Team and the Intranet Team collaborated in Get Online Week to deliver a series of activities for both MCC staff and residents. There were four staff events throughout the week, in which colleagues were supported</p>	



	<p>identified as most excluded via the Digital Exclusion Index.</p> <ul style="list-style-type: none"> <li>• Ensure that the City's learning provision is responding to new challenges as well as existing challenges.</li> <li>• Launching Let Get Digital work though Get Online week</li> </ul>	<p>with their 365 queries, and there were 5 outreach events for residents. Events lasted for two hours and the numbers who engaged varied a great deal (2 to 20). The team encountered some real resistance to engaging in digital at several of the events but were able to have some interesting conversations and challenge the perspectives of some residents.</p>
	<p><b>Social Value and Local Benefit</b></p> <p>Challenge: Many residents are not connecting to opportunities created in the city – how can we use social value internally to maximise creation of employment/skills/training opportunities targeted at our residents and use our influence to do the same with organisations externally?</p> <p>Ensure that MCC's approach to SV reflects current economic circumstances and <i>Think</i> recommendations.</p> <p>Coordinate employment and skills related social value "offers" from across MCC's largest suppliers and capital projects into a pipeline of opportunities that can be promoted to residents and employment/skills/training organisations.</p>	<p><b><i>Maximise Social Value opportunities arising from Victoria North and North Manchester General Hospital developments</i></b></p> <p>–</p> <ul style="list-style-type: none"> <li>• MCC and partners held a successful workshop with Victoria North, North Manchester General Hospital and New Park House contractors on 22 October to explore social value opportunities particularly in relation to digital exclusion and the zero carbon agenda.</li> <li>• Further work is taking place this month with ANTZ on more detailed scoping of how the ANTZ platform could be taken forward. A successful scoping workshop with ANTZ and FEC was held 25 October. Plans to progress a free pilot are being reviewed by the North Manchester Regeneration Economic Benefit Steering Group.</li> </ul>

	<p><b>Business Support, Sustainability &amp; Growth Business Grants</b></p> <p>LRSG, ARG are now closed,</p> <p><b>Growth</b></p>	<p><b>Business Grants</b></p> <ul style="list-style-type: none"> <li>• The EBSG is utilising the remaining £1.2M of the funding provided by Central Government</li> <li>• The Emergency Business grant scheme for businesses with last remaining ARG grant successfully went live on the 18th October to support businesses with ongoing fixed property and employee costs.</li> <li>• Business survey for non-R/V recipients of grants went live on 14<sup>th</sup> October. Feedback is still being received and collated</li> </ul> <p><b>Small Business Saturday Tour</b></p> <p>The Small Business Saturday team are touring the UK with (24 stops across the UK) Manchester being one of the chosen locations:</p> <p><b>Date: 11 November 10-2pm</b></p> <p><b>Location: Wellington, Piccadilly</b></p> <p><b>SME and District Centres Support</b></p> <ul style="list-style-type: none"> <li>• Planning the next SME business support webinar (date tbc).</li> <li>• The Manchester Business Support group has grown in membership to help support SMEs / District Centres / High Streets.</li> </ul>
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	<p><b>Equalities/ Disadvantaged</b></p> <p>Ensure that disadvantaged and underrepresented groups are supported by activity included in Workstreams 1-6. This would include Black, Asian and Minority Ethnic groups, young people, over 50's, homeless, veterans, survivors of DV&amp;A, ESA claimants, and those experiencing family poverty.</p> <p>Covid has worsened the situation for many already experiencing inequality – the challenge is to ensure support is targeted to reach the communities in most need.</p>	<p>The 2<sup>nd</sup> Uncertain Futures Employment &amp; Skills webinar will be held on 16<sup>th</sup> November. National Careers Service will deliver the session on changing careers and labour market intelligence for women over 50 years.</p> <p>The Growth Company as part of the Our Manchester Disability Equality and Inclusion Partnership are delivering a series of workshops for employers to encourage and support them to attract more disabled people. The next online event will be held on 5<sup>th</sup> November.</p> <p>The W&amp;S team will be reviewing the use of language in relation to race and will incorporate this into the activity around the refresh of the W&amp;S strategy currently taking place.</p>
<p><b>Funding</b></p>	<p>No specific known impacts on current external funding bids caused by C19 as yet. Known bids progressing through funding approval processes as expected.</p>	<p><b>Funding Announcements</b></p> <p><b>Digital Connectivity Infrastructure Accelerator</b> launched 9<sup>th</sup> September, closing date 18<sup>th</sup> November. DCMS will allocate up to £4 million of funding to pilots “which support the implementation of digital asset management solutions to open up public assets for the rollout of wireless communication networks.” GMCA are putting a bid together.</p> <p><b>UK Shared Prosperity Fund</b> 3 year of funding announced.</p> <p>2022-3 0.4 billion  2023-4 0.8 billion (0.7 revenue, 0.1 capital)  2024-5 1.8 billion (1.5 revenue, 0.3 capital)</p> <p>As expected, this shows a “ramping up” to European levels of funding by year 3.</p> <p>Supporting local priorities, the UKSPF will include a new initiative ('Multiply') to help hundreds of thousands of adults across the UK</p>

		<p>improve their numeracy skills. All areas will receive access to a learning platform and funding to improve adult skills. £560 million is being allocated to this scheme as part of the SPF.</p> <p><b>Funding in Progress</b>  <b>Community Renewal Fund –</b> LGA has raised the delays in announcement with govt:</p> <p>A spokesperson for the Department of Levelling Up, Housing and Communities said: “Bids are currently being assessed, and the outcomes will be announced in due course” which was helpful.</p> <p><b>Public Sector Decarbonisation Fund Round 3</b> has been announced – MCC secured c.£19m from <b>round 1</b> of the fund and delivery of that programme is our priority. A bid for £4.5 million to the latest round will be submitted this week.</p> <p><b>Funding Approved</b></p> <p><b>Energy Savings Trust’s (EST) eCargo Bike Grant Fund, Local Authority Scheme 2021/2022.</b> . Confirmation of funding received.</p> <p><b>Levelling Up Fund</b> Funding approved for Culture in the City Application (HOMEArches &amp; Campfield) in Budget &amp; Spending Review on 27<sup>th</sup> October. 105 projects funded across the UK, £1.7 billion in total, inc. In Manchester, Tameside, Salford, Bury (x2), and Bolton. Culture in the City will receive £19.8 million.</p>
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<b>External Lobbying</b>	<p>Parliament returns from summer recess on 6 September 2021 with an announcement on the date of the 2021 Spending Review expected soon after. There is currently uncertainty surrounding the 2021 Spending Review period in relation to a 1 or 3 year settlement for local government. Direct lobbying of Government is needed as well as working via Greater Manchester and networks such as Core Cities UK, Convention of the North and the LGA.</p>	<p>Follow up meetings with government officials are continuing following the submission of Manchester's Spending Review proposals. This includes a planned meeting with the Department for Levelling Up Communities and Housing, Department for Transport and Office for Low Emission Vehicles to discuss the hydrogen fleet project.</p> <p>The UK Cities Climate Investment Commission is holding events at COP26 on 3 and 11 November with attendees from HSBC, OECD and the UK Infrastructure Bank.</p>
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**Manchester City Council  
Report for Information**

**Report to:** Economy Scrutiny Committee – 11 November 2021

**Subject:** Overview Report

**Report of:** Governance and Scrutiny Support Unit

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**Summary**

This report provides the following information:

- Recommendations Monitor
- Key Decisions
- Items for Information
- Work Programme

**Recommendation**

The Committee is invited to discuss and note the information provided.

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**Wards Affected:** All

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**Contact Officers:**

Name: Mike Williamson  
Position: Governance and Scrutiny Support Manager  
Telephone: 0161 234 3071  
Email: m.williamson@manchester.gov.uk

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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. If you would like a copy please contact one of the contact officers above.

None

## 1. Monitoring Previous Recommendations

This section of the report contains recommendations made by the Committee and responses to them indicating whether the recommendation will be implemented, and if it will be, how this will be done.

Date	Item	Recommendation	Response	Contact Officer
14 October 2021	ESC/21/49 Work and Health	Recommends that the Director of Inclusive Economy circulate for information the details of organisations who had delivered the Disability Support Webinars	A response to this recommendation has been requested and will be reported back once received.	Angela Harrington Director of Inclusive Economy

## 2. Key Decisions

The Council is required to publish details of key decisions that will be taken at least 28 days before the decision is due to be taken. Details of key decisions that are due to be taken are published on a monthly basis in the Register of Key Decisions.

A key decision, as defined in the Council's Constitution is an executive decision, which is likely:

- To result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates, or
- To be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the city.

The Council Constitution defines 'significant' as being expenditure or savings (including the loss of income or capital receipts) in excess of £500k, providing that is not more than 10% of the gross operating expenditure for any budget heading in the in the Council's Revenue Budget Book, and subject to other defined exceptions.

An extract of the most recent Register of Key Decisions, published on **1 November 2021**, containing details of the decisions under the Committee's remit is included below. This is to keep members informed of what decisions are being taken and, where appropriate, include in the work programme of the Committee.



Development and Growth					
<b>Delivering Manchester's Affordable Homes to 2025 - Establishment of Strategic Partnership with Homes England (2019/09/05A)</b>  To negotiate and formalise a Strategic Partnership with Homes England to enable the delivery of Manchester Affordable Homes to 2025	Strategic Director - (Growth and Development)	Not before 4th Oct 2019	In consultation with the Executive Members for Housing and Regeneration and Finance and HR	Report and Recommendation	Steve Sheen s.sheen@manchester.gov.uk
<b>Delivering Manchester's Affordable Homes to 2025 - Disposal of sites (2019/09/05B)</b>  To agree the disposal of sites in Council ownership for the provision of affordable homes	City Treasurer (Deputy Chief Executive)	Not before 4th Oct 2019	In consultation with Strategic Director (Growth and Development) and Executive Members for Housing and Regeneration and Finance and HR	Report and Recommendations	Steve Sheen s.sheen@manchester.gov.uk
<b>Delivering Manchester's Affordable Homes to 2025 - Establishment of Partnership arrangements with Registered Providers (2019/09/05C)</b>  To establish partnership	Strategic Director - (Growth and Development)	Not before 4th Oct 2019	In consultation with City Treasurer (Deputy Chief Executive) and the Executive Members for Housing and	Report and recommendation	Steve Sheen s.sheen@manchester.gov.uk

arrangements with Registered Providers together with their partners/consortium for defined areas in the North, Central, South and Wythenshawe areas of the City.			Regeneration and Finance and HR		
<b>Delivering Manchester's Affordable Homes to 2025 -Agreement of legal terms (2019/09/05D)</b>  To enter into and complete all necessary legal documents and agreements to give effect to delivering Manchester's Affordable Homes to 2025	City Solicitor	Not before 4th Oct 2019		Report and recommendations	Fiona Ledden, City Solicitor fiona.ledden@manchester.gov.uk
<b>Heron House General Letting Consent (2019/11/25A)</b>  To agree to the disposal by Leasehold of office accommodation at Heron House.	Chief Executive	Not before 24th Dec 2019		Briefing Note & Heads of Terms	Mike Robertson m.robertson@manchester.gov.uk
<b>Disposal of land at Russell Road, Whalley Range, Manchester</b>	Strategic Director - (Growth and	Not before 15th Jun 2021		Report to the Chief Executive and Strategic Director	Mike Robertson m.robertson@manchester.gov.uk

<p><b>(former site of the Spire Hospital) (2021/05/04B)</b></p> <p>Approval to the terms for the granting of a 250 year lease to Anchor Hanover Group for the development of the site for residential purposes.</p>	Development)			of Growth and Development	
<p><b>Disposal of site of former Chorlton Leisure Centre for residential development (21/05/13A)</b></p> <p>Approval to the terms for the leasehold disposal of the site of the former Chorlton Leisure Centre for residential development.</p>	Strategic Director - (Growth and Development)	Not before 13th Jun 2021		Report to the Strategic Director of Growth and Development	Mike Robertson m.robertson@manchester.gov.uk
<p><b>Disposal of Buglawton Hall (2021/05/27A)</b></p> <p>To approve the freehold disposal of Buglawton Hall, Buxton Road, Congleton, Cheshire</p>	Chief Executive	Not before 25th Jun 2021		Briefing Note	Thomas Pyatt, Development Surveyor Tel: 0161 234 5469 <a href="mailto:thomas.pyatt@manchester.gov.uk">thomas.pyatt@manchester.gov.uk</a>
<p><b>Streets for All Strategy (2021/10/08B)</b></p> <p>To adopt the Streets for All Strategy.</p>	Executive	17 Nov 2021		Greater Manchester Streets for All Strategy	Michael Marriott, Head of Local Planning & Infrastructure Michael.Marriott@manchester.gov.uk

<b>Disposal of Simon House, Wavell Road, Wythenshawe for use as a data centre (2021/10/12A)</b>  Approval to the terms for the leasehold disposal of Simon House, Wavell Road, Wythenshawe for use as a data centre	Strategic Director - (Growth and Development)	Not before 4th Jan 2022		Report to the Strategic Director of Growth and Development	Joe Martin, Development Surveyor joe.martin@manchester.gov.uk
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### 3. Economy Scrutiny Committee Work Programme – November 2021

Thursday 11 November 2021, 2.00pm (Report deadline Monday 1 November 2021)

Title	Purpose	Executive Member	Director/Lead Officer	Comments
Initial Budget proposals 2022/23	To receive a short update on the Council's budget position and process and any implications and draft proposals for any services in the remit of this committee	Cllr Leese (Leader)  Cllr White (Executive Member for Housing and Employment)	Pat Bartoli Angela Harrington Paul Hindle	
Graduate retention and student numbers in the City	To consider a report that provides an overview of the student population studying at higher education institutions (HEIs) in Manchester with a focus on The University of Manchester and Manchester Metropolitan University, alongside an overview of graduate retention rates, the impact of COVID-19 on graduate retention and the local response to supporting the graduate labour market.	Cllr White (Executive Member for Housing and Employment)	Angela Harrington	
Contribution of Higher Education institutes to the City's economy	To consider a report which provides an overview of the economic contribution of Manchester's two main universities, the University of Manchester and Manchester Metropolitan University. The report will include data and case studies to illustrate the economic contribution across a number of categories including direct economic impact, indirect economic impact, education and skills, research and engagement.	Cllr White (Executive Member for Housing and Employment)	Angela Harrington	
Economy COVID19 Sit	To receive the most up to date Economy COVID19 Sit	Cllr Leese	David Houliston	

Rep Report	Rep report that details how the Council and the city is progressing with the recovery phase of COVID19 against the areas within the remit of this Committee.	(Leader)	Angela Harrington Pat Bartoli Ruth Ashworth	
Overview Report	The monthly report includes the recommendations monitor, relevant key decisions, the Committee's work programme and any items for information.	N/A	Scrutiny Support	

Thursday 9 December 2021, 2.00pm (Report deadline Monday 29 November 2021)

Title	Purpose	Executive Member	Strategic Director/Lead Officer	Comments
Comprehensive Spending Review and Funding	Precise details to be confirmed	TBC	Angela Harrington Pat Bartoli	
Innovation GM	Precise details to be confirmed	TBC	Angela Harrington Pat Bartoli	
Selective Licensing - Outcome of Public Consultation	To provide detailed feedback on the consultation exercise completed in the areas of Gorton and Abbey Hey, Harpurhey, Clayton and Openshaw to establish whether the declaration of Selective Licensing schemes are required.	Cllr White (Executive Member for Housing and Employment)	Fiona Sharkey	
Economy COVID19 Sit Rep Report	To receive the most up to date Economy COVID19 Sit Rep report that details how the Council and the city is progressing with the recovery phase of COVID19 against the areas within the remit of this Committee.	Leader	David Houlston Angela Harrington Pat Bartoli Ruth Ashworth	
Overview Report	The monthly report includes the recommendations monitor, relevant key decisions, the Committee's work programme and any items for information.	N/A	Scrutiny Support	

Thursday 13 January 2022, 2.00pm (Report deadline Friday 31 December 2021)\* **To account for New Year's day Bank Holiday**

Title	Purpose	Executive Member	Strategic Director/Lead Officer	Comments
Updates on sub strategies of the City Centre Transport Strategy	To receive an update on the progress on a number of the sub strategies contained within the City Centre Transport Strategy This will include an update on the activities undertaken to promote active travel and connectivity across the city.	Cllr Rawlins (Executive Member for Environment)	Pat Bartoli Steve Robinson	
Bus Franchising update	To receive a report in the Greater Manchester Mayor's proposals to franchise the region's bus service and the impact this will have on the city's economy.	Leader	Pat Bartoli	
Economy COVID19 Sit Rep Report	To receive the most up to date Economy COVID19 Sit Rep report that details how the Council and the city is progressing with the recovery phase of COVID19 against the areas within the remit of this Committee.	Leader	David Houlston Angela Harrington Pat Bartoli Ruth Ashworth	
Overview Report	The monthly report includes the recommendations monitor, relevant key decisions, the Committee's work programme and any items for information.	N/A	Scrutiny Support	



Thursday 10 February 2022, 2.00pm (Report deadline Monday 31 January 2022)

Title	Purpose	Executive Member	Strategic Director/Lead Officer	Comments
Budget proposals 2022/23 - update	Consideration of the final budget proposals that will go onto February Budget Executive and Scrutiny and March Council.	Cllr White (Executive Member for Housing and Employment)	Pat Bartoli Angela Harrington Paul Hindle	
Economy COVID19 Sit Rep Report	To receive the most up to date Economy COVID19 Sit Rep report that details how the Council and the city is progressing with the recovery phase of COVID19 against the areas within the remit of this Committee.	Leader	David Houliston Angela Harrington Pat Bartoli Ruth Ashworth	
Overview Report	The monthly report includes the recommendations monitor, relevant key decisions, the Committee's work programme and any items for information.	N/A	Scrutiny Support	

**Themes identified at the Committee's 2021/22 Work Programme setting meeting**  
*(Items highlighted in grey indicate that these have been included in the work plan of one of the above meetings)*

Theme	Tentative Date of meeting
<b>Manchester Airport</b>  To include information on addressing the economic recovery of the Airport whilst tackling the Climate Emergency.	

Previous Items identified by the Committee to be scheduled				
Theme – Strategic Regeneration				
Item	Purpose	Lead Executive Member	Lead Officer	Comments
Theme – Transport and Connectivity				
Item	Purpose	Lead Executive Member	Lead Officer	Comments
Bus Franchising update	To receive an update on the Greater Manchester Mayor's proposals to franchise the region's bus service and the impact this will have on the city's economy.	Cllr Leese	Pat Bartoli	

Theme - Skills development for Manchester residents aged 16 and over.				
Item	Purpose	Lead Executive Member	Lead Officer	Comments
Higher Education provision and its impact on the City's economy	To be determined.	Cllr White (Executive Member for Housing and Employment)	Angela Harrington	
Theme – Growing the Manchester Economy				
Item	Purpose	Lead Executive Member	Lead Officer	Comments
Business Survival rates and the impact on the economy	To receive a report that details the survival rate of new start up business within the city and the economic impact to the city when these businesses fail	Councillor Leese	Mark Hughes (The Growth Company) Louise Wyman Pat Bartoli Angela Harrington	
Theme - Miscellaneous				
Item	Purpose	Lead Executive Member	Lead Officer	Comments
Audit of Temporary Accommodation Costs	To receive a report for information that details the cost of Temporary Accommodation.	Councillor Rahman	Mohamed Hussein	
Purpose Built Student Accommodation -	Update on the current position on Purpose Built Student Accommodation	Cllr White (Executive	Pat Bartoli	

update	and implications for future development.	Member for Housing and Employment)		
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