

Fallowfield Campus Redevelopment Project

Socio-Economic Regeneration Statement

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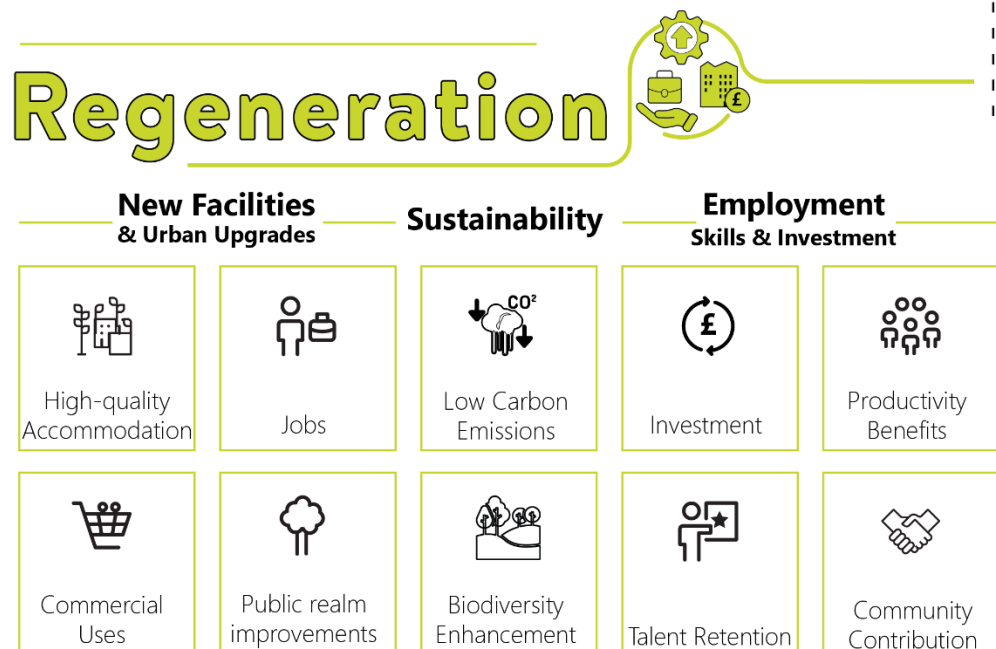
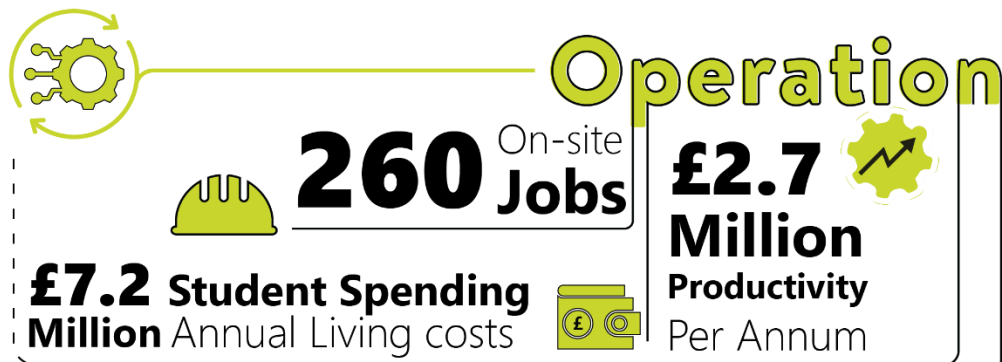
0. Executive Summary

- 0.1.1 This socio-economic regeneration statement sets out the range of potential economic benefits and regeneration impacts of the Fallowfield Campus Redevelopment Project (hereafter referred to as the 'proposed development').
- 0.1.2 The city of Manchester has witnessed tremendous growth in student enrolments over recent years, but the delivery of student accommodation has not been able to keep up with the growth in number of students. This has resulted in students opting to enter into the private rental housing market. The proposal aims to ease this pressure by delivering new student accommodations in the city.
- 0.1.3 The proposed development aims to redevelop part of the existing Fallowfield Campus student accommodation site which has ageing student accommodation buildings including Owens Park, Woolton Hall and Oak House, spread across approximately 9.49 hectares of land. The proposed development will consist of 3,300 new student beds (Sui Generis use class) along with associated facilities including waste storage, laundry and cycle storage; up to 4,500 sq m of floorspace to be used for ancillary purposes associated with the student residential use of the site within Use Class F1a, Class E(a), E(b), E(c), E(d), E(g), Sui Generis (drinking establishment and hot food takeaway); ancillary supporting staff accommodation (up to 55 bedrooms) (Sui Generis use class), and up to 15 units (1,200 sq m), of ancillary residential dwellings (Use Class C3), plus associated car parking, hard and soft landscaping, open space, utilities, footpaths and roads. It should be noted that the application is in outline, and the commercial area of the final proposal that emerges through detailed design may differ slightly in commercial quantum
- 0.1.4 The site is approximately 1 mile away from the renowned Oxford Road Corridor- Manchester's Knowledge Quarter. The impact of the proposed development together with the investments in the Manchester Innovation District (ID-Manchester) will establish Manchester as one of the key centres for the knowledge economy.

The following key benefits will be realised by the proposed development:

- The construction and demolition phase of the proposed development will generate 639 Full Time Equivalent (FTE) temporary construction jobs, where 426 will be direct construction jobs and 213 jobs in supply chain and construction employee spending.
- In the operational phase, the proposed development will generate approximately 260 permanent jobs. Once existing on-site employment is accounted for, the proposed development is estimated to result in a total net addition of 73 permanent jobs to the local economy.
- Productivity benefits/Gross Value Added (GVA) will equate to approximately £38m during the construction and demolition phase and £2.7m during the operational phase of the proposed development.
- Estimated spending of approximately £7.2m per year within the local area on food, drink, retail and leisure/services.

- The proposed development will have a positive regeneration and infrastructure impact on the local community. The scheme will replace the old, dilapidated building stock with high-quality student accommodation and add circa 950 beds.
- The proposed development will help increase the local vitality by enhancing the neighbourhood's safety, liveability and sustainability quotient.



1. Introduction

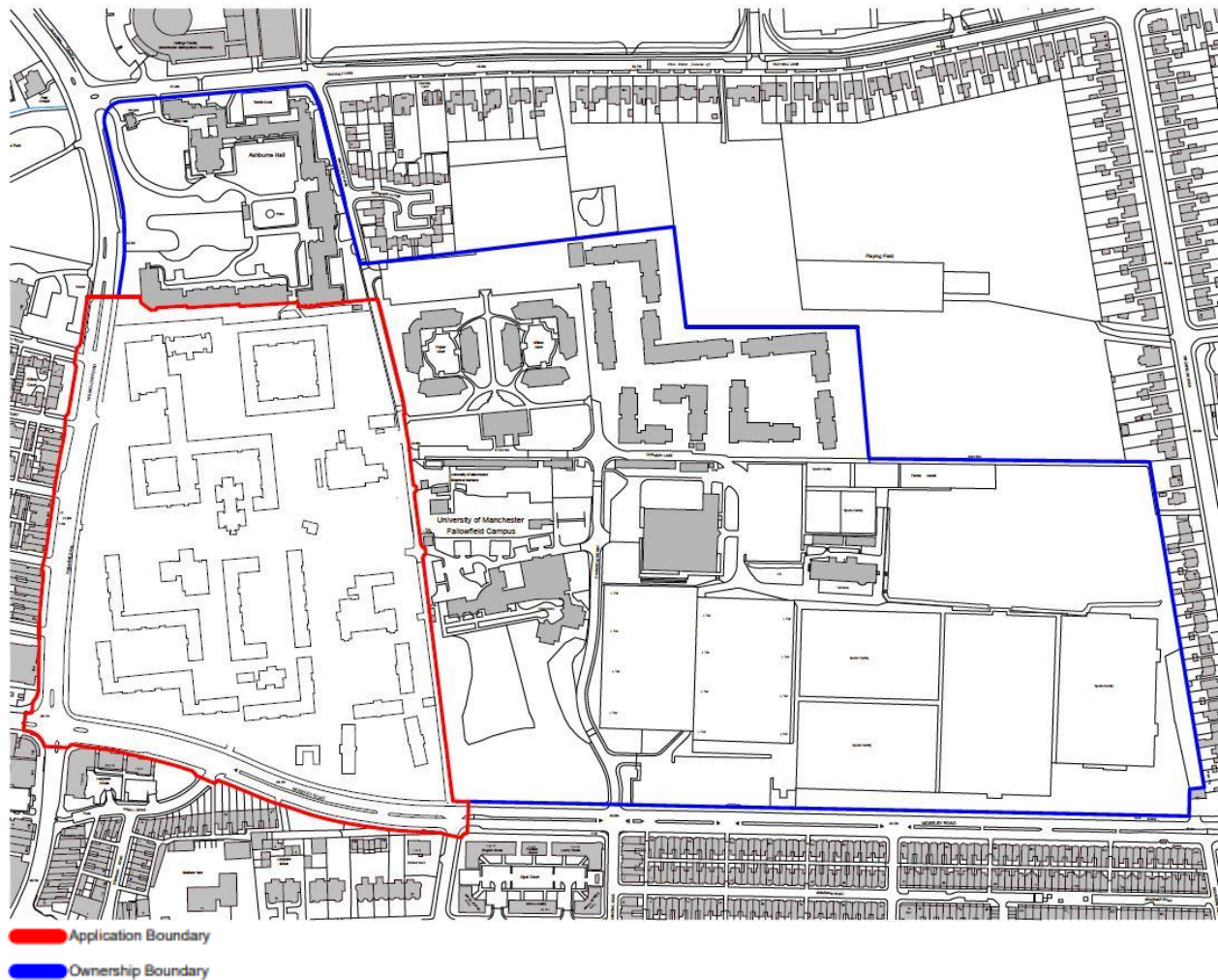
This socio-economic regeneration statement has been prepared by Buro Happold Ltd. on behalf of the University of Manchester (UoM – ‘the applicant’) to provide a robust socio-economic assessment of the Fallowfield Campus Redevelopment Project (hereafter referred to as the ‘proposed development’), a 3300-bed Purpose Built Student Accommodation (PBSA) scheme with associated facilities at Wilmslow Rd, Fallowfield, Manchester M14 6HD.

1.1 Existing Site Conditions

- 1.1.1 The UoM wants to redevelop its existing ageing purpose-built student residential accommodation at Owens Park, Woolton Hall and Oak House, all part of the Fallowfield campus within the south Manchester suburb of Fallowfield. This redevelopment aims to enhance the quality of accommodation in one of the largest student halls on campus. Additionally, the redevelopment is driven by the anticipated increase in student numbers and the goal of providing all undergraduate students at UoM the option of a University hall of residence.
- 1.1.2 The redevelopment site is spread across 9.49 hectares and currently has capacity of 2,374 beds, although at present Owens Park (1,071 beds) is not in use due to its poor condition. In addition to the residential area, there is the following commercial space
 - Owens Bar Longe and hall (2,632 m²)
 - Oak Squirrel Bar (1,553 m²).
- 1.1.3 Additionally, the existing site consists of a 1,203 m² dining hall and kitchen within Woolton Hall’s main building. The site is currently serviced by the existing Limes building consisting of launderettes, catering space and other student services area measuring 1,650 m². This building is also proposed for demolition under this application, however, the construction of a building providing similar services will be located outside the site boundary and will form a separate planning application.
- 1.1.4 As per the information provided by the applicant, the Fallowfield campus currently employs 350 people. This includes staff responsible for operations, maintenance and management of the student accommodation (4,450 beds), and the staff employed for commercial (including bars) and student service areas.
- 1.1.5 The employment information provided by the applicant is for the entire Fallowfield campus, consisting of 4,450 beds, and the assessment is for the site within the application/ site boundary (refer to Figure 1) which consists of 2,374 beds. We adopted a pro-rata approach to estimate the number of existing jobs within the application boundary. The approach indicates that the uses within the application boundary would employ 187 people including staff responsible for operations, maintenance and management of the student accommodation (2,374 beds), the staff employed for commercial (including Owens Bar Lounge, Oak Squirrel Bar) and student service areas.
- 1.1.6 The assessment assumes the 2-digit Standard Industry Classification (SIC) 77-82 classification

(administrative and support services activities) for the jobs within the existing development. According to the employment and productivity data provided in the ONS (2023; 2021), the average GVA per employee for SIC 77-82 in Greater Manchester is £36,500 per annum.

Figure 1 Existing site plan



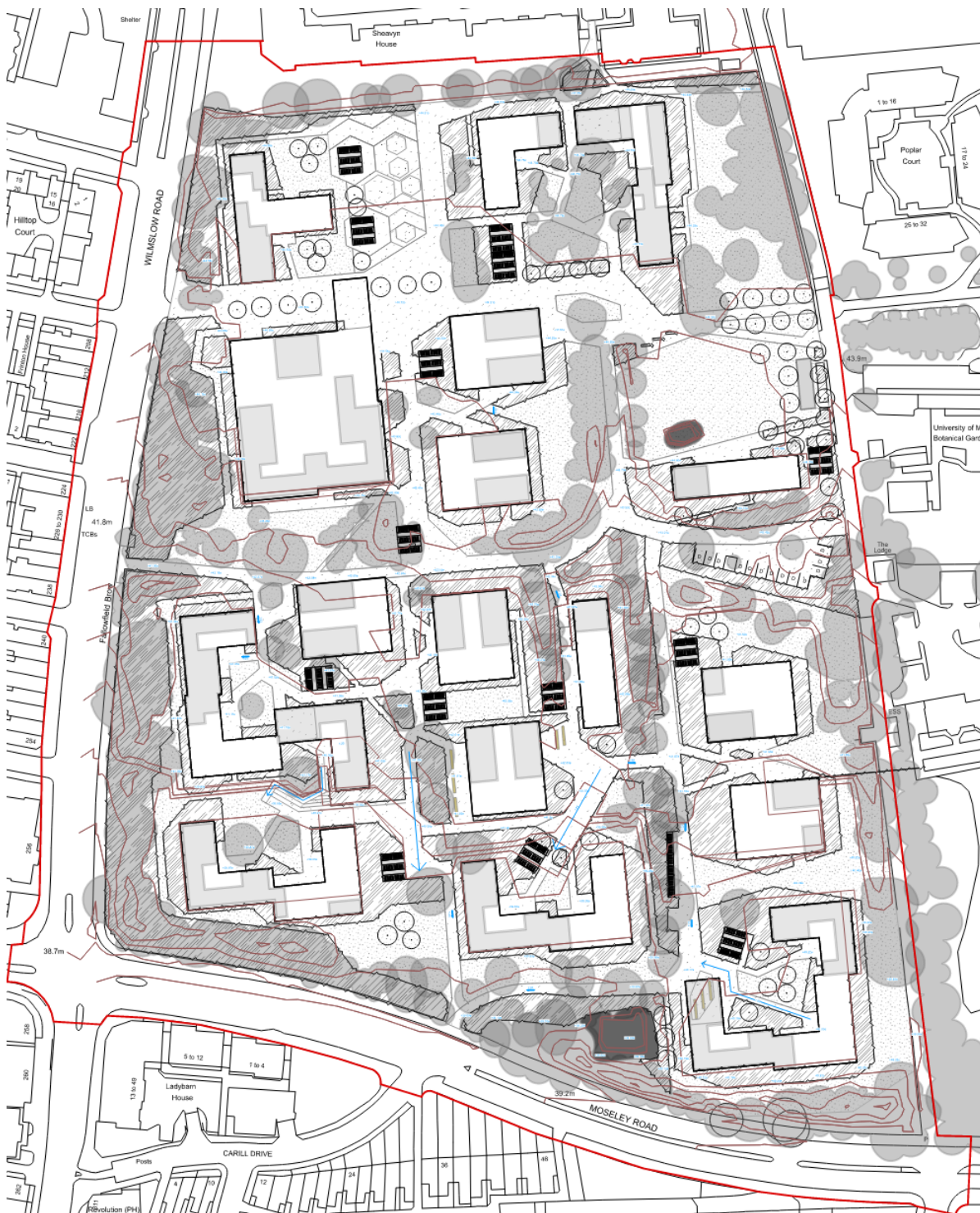
1.2 Proposed Development

- 1.2.1 The proposed development is being planned as per the objectives and criteria set out in policy H12 of the Manchester Core Strategy (refer to 3.3.2).
- 1.2.2 The proposed development will consist of 3,300 beds with a gross internal area of 122,586 m². The accommodation typology split is 30% economy, 60% standard and 10% premium rooms with some units being universally accessible.
- 1.2.3 The proposed development will include waste storage, laundry and cycle storage; up to 4,500 sq m of floorspace to be used for ancillary purposes associated with the student residential use of the site within Use Class F1a, Class E(a), E(b), E(c), E(d), E(g), Sui Generis (drinking establishment and hot food takeaway); ancillary supporting staff accommodation (up to 55 bedrooms) (Sui Generis

use class), and up to 15 units (1,200 sq m), of ancillary residential dwellings (Use Class C3), plus associated car parking, hard and soft landscaping, open space, utilities, footpaths and roads.

1.2.4 Adequate external covered bike stores will also be provided as part of the proposed development.

Figure 2 Technical masterplan of the proposed development



1.2.5 As mentioned within the Fallowfield Design Guide, the proposed development has the following objectives:

- Enhance the ability of UoM to attract students and academicians from all over the globe by providing a high-quality conducive living and working environment.
- Re-generate the existing low-density site to meet the growing demand and provide better quality accommodation while relieving pressure from the private rental housing market in the surrounding areas.
- Improving the environment for pedestrians and cyclists while encouraging a balanced and vibrant residential community.
- Retain and enhance the existing green parkland character of the site via the incorporation of existing planting and mature trees into the scheme.
- Preserve and enhance where possible the ecology and biodiversity on the site, locally and as a whole.
- Preserve the character and setting of the listed buildings surrounding the site.

1.2.6 The proposed development aims to achieve a distinct character to support a sense of belonging and well-being amongst students and enhance the liveability of the surroundings. It shall contribute to social cohesion within the wider Fallowfield Campus, and prevent a negative impact on adjacent residential areas.

1.3 Study Area

1.3.1 The spatial scales utilised in the assessment are defined as follows:

- **Local Impact Area:** Manchester City (area administered by the Manchester City Council)
- **Wider Impact Area:** Greater Manchester (area administered by the Greater Manchester Combined Authority) and surrounding areas

1.4 Study Purpose

1.4.1 This socio-economic regeneration benefits statement examines the economic impact of the proposed development and is intended to support and inform any future planning applications made by the applicant concerning the site. Such assessments play an important role in determining the benefits of a scheme and justifying any social and financial cost. The purpose of this assessment is to:

- Define the direct employment benefits alongside the GVA of the proposed development on the local impact area and the wider impact area.
- Calculate the indirect and induced economic benefits of the proposed development.
- Utilise additionality calculations to assess the net impact taking into account potential alternative interventions to produce robust and realistic economic figures.

- Report the qualitative and strategic implications of the proposed development
- Estimate temporary benefits: Direct, indirect and induced employment generated during the construction phase, alongside total GVA.
- Estimate operational benefits: Permanent direct employment created during the operational phase of the development, alongside total GVA.
- Calculate student expenditure and the net additional benefits to the local economy from the new student population.
- List the strategic regeneration benefits of the proposed development.

1.5 Methodology

- 1.5.1 The socio-economic regeneration statement is based on data provided by the applicant relating to estimated construction expenditure, number of student beds, and planned size of the proposed development.
- 1.5.2 This statement draws on both qualitative and quantitative analysis to demonstrate the range and scale of socio-economic impacts that will be generated by the proposed development. The assessment has been informed by a review of relevant Treasury guidance on impact assessments, in particular the Green Book Appraisal, Evaluation in Central Government Guidance and Homes and Communities Agency (HCA) Additionality Guidance (4th Edition).
- 1.5.3 The assessment provides figures for economic effects including employment and GVA, being the total economic effects generated. A pro-rata approach was adopted to generate gross employment figures for the operational phase based on the information provided by the applicant. Net figures are provided to demonstrate the net additional economic impact of the proposed development once additionality factors have been accounted for, creating a robust and realistic estimation of the economic impact of the proposed development.

1.6 Report Structure

- 1.6.1 The remainder of the report is structured as follows:
- **Section 3:** Socio-Economic Context
 - **Section 4:** Legislation and Policy Context
 - **Section 5:** Socio-Economic Regeneration Benefits Assessment
 - **Section 6:** Summary and Conclusions

2. Socio-Economic Context

This section explores the baseline Higher Education (HE) context through an examination of the current conditions within the Local Impact Area and its relationship with the economy.

2.1 Economic trends

- 2.1.1 According to Greater Manchester Local Enterprise Partnership (GMLEP), Manchester City's economic output is forecast to be 97.8% of its pre-pandemic levels by the end of 2022. Interestingly, economic output for Greater Manchester is slightly closer to pre-pandemic levels, with an output of 99.1% of 2019 levels. This indicates that areas outside the city centre in Greater Manchester have recovered quicker than the rest of the country.
- 2.1.2 Manchester City is set to see the third-fastest economic growth of all UK towns and cities between 2024 and 2026. When measured by GVA, Manchester City's economy is expected to see an annual average growth of 2.5% between 2024 and 2026, comfortably outpacing the national growth rate (2.1%) (GMLEP, 2023).

Labour Market

- 2.1.3 According to the MCC (2023b) report on the labour market and recruitment, Manchester city has one of the highest unemployment rates (5.7%) of the English core cities with the Unemployment Claimant Count (UCC) standing at 22,325 in November 2022. The ongoing cost-of-living crisis has led to increased pressures on the workforce and a shortage of labour when emerging from the pandemic. There is a general uncertainty and increased business risk, disrupted supply chains and highly variable business and market conditions. The end of furlough did not result in high unemployment through redundancy.
- 2.1.4 The education industry is the fourth biggest employer in Greater Manchester (ONS, 2021). One in five jobs in Greater Manchester is now located in Manchester city centre, and there have been 27% more jobs in the city centre since 2015 (MCC, 2023b).

Table 1: Employee jobs by industry in Greater Manchester (ONS, 2021)

Industry	Greater Manchester (Employee Jobs)	Greater Manchester (%)
B: Mining and Quarrying	200	0.0
C: Manufacturing	94,000	6.8
D: Electricity, Gas, Steam and Air Conditioning Supply	11,000	0.8
E: Water Supply; Sewerage, Waste Management and Remediation Activities	4,500	0.3
F: Construction	75,000	5.4
G: Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	202,000	14.5
H: Transportation and Storage	79,000	5.7
I: Accommodation and Food Service Activities	96,000	6.9

Industry	Greater Manchester (Employee Jobs)	Greater Manchester (%)
J: Information and Communication	50,000	3.6
K: Financial and Insurance Activities	53,000	3.8
L: Real Estate Activities	32,000	2.3
M: Professional, Scientific and Technical Activities	149,000	10.7
N: Administrative and Support Service Activities	139,000	10.0
O: Public Administration and Defence; Compulsory Social Security	63,000	4.5
P: Education	113,000	8.1
Q: Human Health and Social Work Activities	182,000	13.1
R: Arts, Entertainment and Recreation	28,000	2.0
S: Other Service Activities	21,000	1.5
TOTAL	1,391,000	100

- 2.1.5 Recruiting talent in the current labour market remains an issue for businesses in Manchester City. There is competition for talent across the economy, as well as in sectors and industries where this has been a longer-term issue such as digital and construction. The main technical skill gaps identified as per the labour market and recruitment report (MCC, 2023b) are specialist skills (30%), knowledge of products/services (11%), and solving complex problems (11%). The main people and personal skill gaps identified are sales skills (18%), managing or motivating staff (12%), and team working (12%).
- 2.1.6 The total value of Greater Manchester's economy in GVA terms was £75 billion in 2019. According to the ONS, Greater Manchester has an average GVA per employment of £52,225, with construction employees (SIC 41-43) having an average GVA of £58,800 and employees associated with administrative and support service activities (SIC 77-82) having an average GVA of £36,500
- 2.1.7 According to the report published by the Construction Industry Training Board (CITB, 2022), the gross output per construction employee in the North-West region is £69,750.
- 2.1.8 The Greater Manchester employment series is yet to regain its pre-pandemic peak level but the boroughs of Manchester, Bolton, Bury and Wigan have recovered. Within employment, the number of self-employed workers has fallen substantially in all boroughs.
- 2.1.9 The monthly ONS real-time information for Greater Manchester employees on the company payroll has grown at a faster rate than the UK and North West since 2014. Manchester City and Salford gained 25% additional employees over seven years. All the employee series across Greater Manchester have recovered.
- 2.1.10 Manchester has the largest outside graduate talent pool outside of London (MCC, 2021a). The graduate talent pipeline is an essential component of achieving the city's strategic ambitions and plays an important role in supporting the city and regional economy, and in providing opportunities for the city's communities and residents. Despite an increase in graduates, the retention and attraction of graduates, skills shortages across several key sectors, and graduate

underemployment, all remain an issue nationally and within Manchester.

- 2.1.11 According to the Higher Education Statistics Agency (HESA) Graduate Outcomes Survey, 23% of graduates indigenous (who studied in the city) to Manchester city entered work in the city within 15 months of graduating in the 2018/19 academic year. This represents a slight increase in 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 northwest region outside of Greater Manchester. The wider economic and social impact of the Higher Education Institutions (HEIs) is discussed in the following section.

Contribution of Higher Education Institutes (HEIs) to the city's economy

- 2.1.12 The city of Manchester is internationally renowned for the strength of its HEIs and has always maintained a strong civic bond with the Council and local communities. 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.
- 2.1.13 The UoM and Manchester Metropolitan University are part of the Oxford Road Corridor Partnership Manchester Innovation District (ID-Manchester)) spread across one square mile south of the city centre and approximately 1-mile north-west of the site. According to the report published by MCC (2021b) on the contribution of HEIs to Manchester City's economy, the following are the key performance indicators depicting the contribution of the Oxford Road Corridor district to the prosperity of the region:
- 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
 - Over 16,000 international students
 - 27,000 graduates and post-grads are supplied into the labour market each year.
- 2.1.14 UoM 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.
- 2.1.15 According to the research conducted by Public First, in 2018/19, the two Manchester universities created £5.3 billion in value for the UK, £2.1 billion for Greater Manchester and £1.2 billion for Manchester. The £1.2 billion value for Manchester is comprised of the following three key areas:
- Teaching Impact (£217 million)

- Research Impact (£15 million)
 - Economic impact (£945 million)
- 2.1.16 Students make an invaluable contribution to the city's economy, diversity and vibrancy. They help to underpin a broad-based, highly skilled economy and are essential to some of Manchester's most valuable growth sectors in advanced manufacturing, health and life sciences. According to the MCC (2021a) report on student population and graduate retention in Manchester City, over 50% of students remain in the city after graduation and contribute to the local economy.

2.2 Demographic profile

- 2.2.1 According to the ONS, between the last two censuses (held in 2011 and 2021), the population of Manchester increased by 9.7%, from just over 503,100 in 2011 to around 551,900 in 2021.
- 2.2.2 The Places for Everyone (PfE) Joint Development Plan claims Greater Manchester has one of the largest student concentrations in Europe. The HESA (2022) data suggests there were 121,305 students enrolled at Greater Manchester's HE providers. The city region's four universities account for 99% of the total enrollments and with 46,410 students in 2021/22, the UoM has the most students in the city region.
- 2.2.3 In recent years, Manchester has become an increasingly young city, in part driven by the strong HE provision and ensuing graduate retention and attraction of graduate talent from universities outside of the city. 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 offered for home students and the research and innovation capacity.
- 2.2.4 As evident from Figure 3, the 2020/21 academic year saw a sharp increase in the student population in the Greater Manchester region.

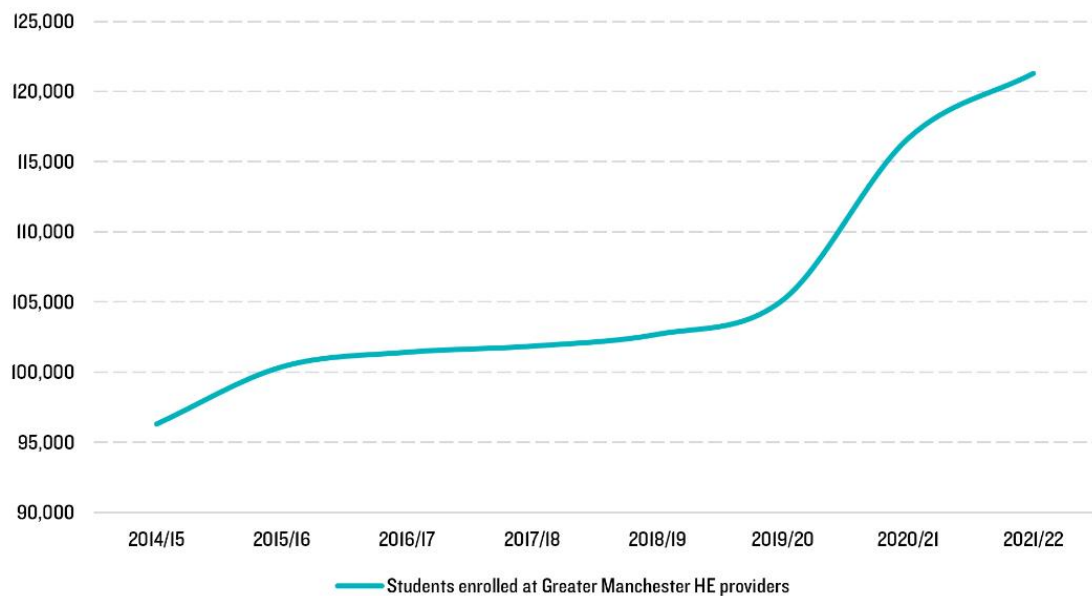


Figure 3 Students Enrolled at Greater Manchester HE Providers 2014/15 - 2021/22 (Kidd-Rossiter, 2023)

2.2.5 As a result of this rapid growth in student numbers, there has been an unprecedented demand for student accommodation in the Greater Manchester Area. But, according to a report by MCC (2023a) on PBSA, the city faces an acute shortage of PBSA and would require 750 beds per annum up until 2030 to meet the growing demand. The total demand for new PBSA estimated by the council is between 5,440 beds (representing a 1% growth per annum) and 11,320 (representing a 2% growth per annum) up to 2030. As a result of UoM shutting down sub-standard accommodation and the lack of sufficient new PBSA in appropriate locations this situation has worsened.

2.3 Student Housing Market Analysis

2.3.1 According to the full-time and sandwich HE student enrolments and term-time accommodation data by HESA, approximately 42% of the total term-time accommodations are privately rented housing stock whereas, there are only 39% of the PBSA. The lack of PBSA in Greater Manchester has left many students with no other option but to enter the mainstream rental market with rents reported to have increased between 20%-40% across the city region over the past year (Kidd-Rossiter, 2023).

Table 2: Full-time and sandwich HE student enrolments by HE provider (UoM) and term-time accommodation (HESA, 2023)

Type of term-time Accommodation	HE provider: UoM
Provider maintained property	6,845
Private-sector halls	9,565
Parental/guardian home	3,965
Own residence	1,470
Other rented accommodation	17,675
Other	190

Type of term-time Accommodation	HE provider: UoM
Not in attendance at the provider	835
Not known	1,710
TOTAL	42,260

- 2.3.2 According to the MCC's report on PBSA in Manchester (MCC, 2023a) 20 sites have been identified within the city which could potentially support around 12,500 PBSA bed spaces. This would ease the pressure on the private rental housing market.
- 2.3.3 Manchester City Council is considering a review of Core Strategy Policy H12, which focuses on Purpose Built Student Accommodation (PBSA). However, the MCC (2019) report titled 'Consideration of Policy H12: Purpose Built Student Accommodation Within the Changing Market Context' highlights that the Council loses almost £17 million per year in tax revenue due to students being exempt from paying Council Tax in their occupation of HMOs (House in Multiple Occupancy), particularly in South Manchester. To capitalize on the Oxford Road Corridor and recoup tax losses, the Council aims to encourage a shift in the location and culture of the student accommodation market.
- 2.3.4 According to the MCC report (MCC, 2019), HMOs in South Manchester, particularly Fallowfield, Rusholme, and Victoria Park, remain popular amongst students due to lower costs compared to direct-let PBSA. While there has been a small shift from HMOs to PBSA, the challenge remains to persuade the majority of students to choose PBSA over traditional, cheaper HMOs, freeing up HMOs for family housing. Encouraging students to shift from traditional HMOs to PBSA hinges on affordability, quality, convenience, and well-being enhancements.
- 2.3.5 According to the MCC report (MCC, 2019), Manchester's PBSA market is expensive and MCC is considering adopting a London-like approach with 35% affordable units in the new PBSA. This would be needed to stabilize rental growth and provide a range of diverse and more affordable PBSA options, which adhere to quality standards. Ensuring an affordable residential market is crucial to attracting and retaining students from various backgrounds and proximity to campuses.
- 2.3.6 Manchester's PBSA stock quality lags behind other cities (MCC, 2019). Addressing this is crucial for competitiveness in education. The city needs new high-quality student accommodation near institutions promoting student well-being, offering flexible spaces, and contributing to the city's reputation and sustainability goals.
- 2.3.7 The challenge identified by MCC is creating an affordable PBSA that competes with HMOs in terms of quality and value. Student preferences for city centre living have led to a contraction in the purpose-built student housing market in the southern part of the city. The advantages of PBSA over HMOs should be communicated efficiently to the students to generate sufficient demand for student housing in the region.

Health and Economic Impact of PBSA and HMOs

- 2.3.8 PBSA has broader benefits, creating value for local communities. The health and economic impacts of having PBSA (purpose-built student accommodation) rather than HMOs in the UK are complex and multifaceted.

- 2.3.9 PBSA is often designed to provide high-quality, purpose-built accommodation for students. On the contrary, HMOs are often associated with poor living conditions, overcrowding, and lack of privacy, which can have negative impacts on the mental health and well-being of students.
- 2.3.10 HMOs may also be more susceptible to health and safety hazards, such as fire risks and pest infestations, due to the higher number of occupants.
- 2.3.11 HMOs can provide affordable housing options for students and other renters, as they are often cheaper than PBSA. However, PBSA may be more secure and provide a greater sense of community than HMOs. They can provide economic benefits to local communities by creating additional jobs, generating tax revenue, and supporting local businesses, whilst on the other hand HMOs contribute to a transient population and may be less likely to provide positive economic impacts on local communities than PBSA.

2.4 Crime

- 2.4.1 According to the Crime Impact Statement (CIS) produced by the Manchester City police, the Fallowfield Campus neighbourhood has witnessed elevated crime rates, notably violence, damage, vehicle-related offences, and theft. Crime hotspots include Wilmslow Road, Sherwood Street, and Cawdor Road.
- 2.4.2 Students are frequently targeted due to vulnerability, valuable possessions, unfamiliarity with the area, and low-security awareness.
- 2.4.3 According to CIS, violent incidents include assaults, public order breaches, and harassment, both indoors and in public spaces. Widespread criminal damage affects homes, vehicles, student properties, and fences.
- 2.4.4 The MCC has started a Safer Streets campaign and allocated significant funds to address the issue of student safety on the Fallowfield Loop. The initiative includes a community warden, a safe space hub, improved lighting, infrastructure, school partnerships for cycle training, and a crime-reducing landscape.

3. Legislation and Policy Context

This section reviews the applicable national, regional and local policies and guidance.

3.1 National Policy and Guidance

National Planning Policy Framework (NPPF) (MHCLG, 2021)

- 3.1.1 The NPPF guides local authorities, planning inspectors, and decision-makers on how to make planning decisions and shape development sustainably and efficiently.
- 3.1.2 Local authorities are required to take the NPPF into account when preparing their local development plans and making planning decisions. It provides a set of principles and objectives for balancing competing interests, such as the need for housing and economic growth with environmental protection and community well-being.
- 3.1.3 The NPPF suggests local councils assess the housing needs (size, type and tenure) of different groups in the community (including students) while preparing local development plans.
- 3.1.4 The NPPF allows exemptions to the affordable housing requirement where the site or proposed development provides special accommodation such as purpose-built student accommodation.

Planning Policy Guidance (PPG) (MHCLG, 2019)

- 3.1.5 The PPG refers to a series of documents issued by the government in the United Kingdom that guide local planning authorities, developers, and other stakeholders on various aspects of the planning system. PPGs offer detailed advice and interpretation of national planning policies, helping to ensure consistency and effective implementation across different planning authorities. These documents are designed to assist local planning authorities in preparing their local development plans, as well as guiding developers and other stakeholders in understanding the expectations and requirements of the planning system
- 3.1.6 The PPG advocates for the planning of sufficient housing for groups such as students based on housing needs and eases the pressures off the private housing market. The accommodation should be low-cost and meet the expectations of the students.
- 3.1.7 The PPG recommends the Local Planning Authorities (LPAs) plan for sufficient provisioning of student accommodation in consultation with the universities to better understand the housing needs.

3.2 Regional Policy and Guidance

Greater Manchester Strategy 2021-2031 (GMCA, 2021)

- 3.2.1 This strategy sets out the long-term vision and priorities for the Greater Manchester area. It outlines the region's ambitions and objectives across various domains, including the economy, environment, transport, housing, health, and social issues.

- 3.2.2 There is no direct reference to the provisioning of Purpose Built Student Accommodation (PBSA) in the Greater Manchester Strategy, but the proposed development will help achieve some of the priorities and socio-economic objectives set, for the prosperity and holistic growth of the region, within the strategy document. The following are the key objectives of the strategy:
- Reduce inequalities to drive economic growth, ensuring that a variety of demographics are contributing to and benefitting from the region's success.
 - Foster and maintain social infrastructure and increase engagement with the local community.
 - Make Greater Manchester accessible for people of all ages and backgrounds.
 - Increase access to sustainable transport through improved public transport, cycling and pedestrian infrastructure.
 - Redevelop buildings to achieve equality and environmental goals.

Places for Everyone (PfE) Joint Development Plan (GMCA, 2021)

- 3.2.3 PfE Joint Development Plan is a long-term plan of nine Greater Manchester metropolitan districts that will determine the kind of development that takes place within these local authorities, maximising the use of brownfield land and urban spaces while protecting Green Belt land from the risk of unplanned development. The plan is the result of a process that began as the Greater Manchester Spatial Framework (GMSF) in 2014 and has been informed by the feedback received from residents, businesses and the development industry to previous consultations on that Plan. The nine districts decided to continue to produce a joint plan following the withdrawal of the Stockport Council from the GMSF in December 2020.
- 3.2.4 Through Policy JP-P5: Education Skills and Knowledge; the plan supports the continued growth of the university sector by:
- Enhancing the existing campuses and developing new ones;
 - Strengthening the world-leading research capabilities and promoting opportunities for business spin-offs; and
 - Continuing to help develop Greater Manchester as the UK's best destination for students
- 3.2.5 Policy JP-H3: Type, size and design of new housing advocates for provisioning of student housing through district local plans. All new dwellings must:
- Comply with the nationally described space standards; and
 - Be built to the 'accessible and adaptable' standard in Part M4(2) of the Building Regulations, unless specific site conditions make this impracticable.

3.3 Local Policy and Guidance

Manchester Core Strategy (MCC, 2012)

- 3.3.1 The Manchester Core Strategy document, also known as the Core Strategy Development Plan Document (DPD), is a key planning document that sets out the long-term spatial vision and strategic policies for the city of Manchester. It provides a framework for guiding development and shaping the city's growth and regeneration. The document is prepared by MCC and is based on extensive research, consultation, and analysis of the city's needs and aspirations. It covers a wide range of planning-related topics, including land use, housing, employment, transportation, community facilities, and the environment.
- 3.3.2 The strategy document outlines Policy H12: Purpose Built Student Accommodation to support the provision of new student accommodation and meet Manchester City Council's regeneration priorities. The sites for PBSA should be high-density accommodation near the university or to a connecting high-frequency transport route. It should be located in an area compatible with existing developments and initiatives, and should not lead to an increase in on-street parking. Preference will be given to proposals that have a positive regeneration impact and integrate with the existing neighbourhood without adding pressure on local services. Additional consideration should be given to the proposal's impact on informal crime prevention and to any potential increase in noise and disturbances. Developers must be able to demonstrate either a need for student accommodation in Manchester or an agreement with the university to supply bed spaces.
- 3.3.3 Policy H11: 'Houses in Multiple Occupation (HMO)' of the strategy permits the development of HMOs such as student halls where the accommodation is of a high standard and does not disrupt the character of the area. The policy would prevent further loss of Class C3 dwelling houses, which generally provide accommodation for families, to Class C4 HMOs. The policy allows for change of use from C3 to C4 in areas where specific regeneration initiatives to increase family housing have taken place, only where it can be demonstrated that there is no reasonable demand for the property as a C3 dwelling house.
- 3.3.4 Policy C6: 'South Manchester District Centres' of the strategy supports the development of the University of Manchester facilities adjoining Fallowfield District Centre.

4. Socio-Economic Regeneration Benefits Assessment

This section sets out the quantifiable economic benefits likely to be generated during the construction and operational phases of the proposed development. It also quantifies benefits to the local economy from student expenditures and highlights the local regeneration and infrastructure impacts.

4.1 Construction and demolition phase impacts

Employment

- 4.1.1 Construction and demolition activity will result in employment creation which represents a positive economic effect that can be estimated as the function of the scale and type of construction (infrastructure and buildings).
- 4.1.2 It is assumed that the construction and demolition works for the proposed development will take approximately 40-52 months.
- 4.1.3 The site contains several existing buildings: Owens Park, Woolton Hall Oak House, and the Limes Building which will be demolished.
- 4.1.4 The construction and demolition work associated with the proposed development will generate new temporary employment opportunities. The scale of construction employment created has been estimated using standard ratios for gross output per employee in the construction sector.

Gross Direct Construction Employment Impacts

- 4.1.5 The direct expenditure involved in the construction phase of the proposed development will lead to an increased output generated in Manchester and regional economies. The employment resulting from the temporary construction phase can be estimated by applying an average gross output per construction industry employee to the estimated total construction cost. The proposed development is therefore assessed to generate a total of 5,677 person-years of construction employment on-site; the majority of these are during the demolition and construction phase.
- 4.1.6 By using the convention of equating ten person-years of employment to one FTE job in the construction sector, it is estimated that approximately 568 FTE gross direct construction jobs would be created during the temporary construction and demolition phase.

Net Construction Employment Impacts

- 4.1.7 In calculating the estimated number of jobs generated by the proposed development at the construction and demolition stages, the methodology follows that set out in the Homes and Communities Agency (HCA) Additionality Guide 4th Edition (HCA, 2014). The guidance recommends that the gross number of jobs should be adjusted to arrive at a net figure that takes into account deadweight, leakage and displacement. The same guidance has been used when calculating the indirect and induced multiplier effects.
 - **Deadweight:** Defined as the 'output that would have occurred without the intervention'. In this case, the 'intervention' is the proposed development. The deadweight is assumed

to be zero (output), given it is expected that no major construction would be progressed on the site in the absence of the proposed development on the basis that the site already contains an existing 2,374-bed student scheme.

- **Leakage:** It is assumed that a contractor based in Manchester will be used for the construction phase, and thus it is assumed that a high proportion of employment will be from within the Greater Manchester region. The Travel to Work (2011 Census analysis of UK origin-destination data) report published by Manchester City Council suggests that approximately 40.2% of workers live and work in Manchester. Therefore we have applied a high leakage ratio of 59.8%.
 - **Displacement:** It is acknowledged that the construction of the Proposed Development may temporarily displace construction activity at the local and regional levels. As such, the level of displacement at the local level is estimated to be low (25%). Taking account of the wider economic area at a regional level, and to ensure a robust assessment, it is assumed that displacement will also be low (25%).
 - **Substitution:** It is assumed that substitution will be zero as jobless individuals will not be employed in place of current workers during the construction phase.
 - **Multiplier effects:** Major construction projects can have significant supply chain impacts through the purchasing of materials from suppliers (glass, steel, concrete etc.). The relationship between the initial direct construction spend and the total economic impact of supply chain spending is defined as the 'multiplier effect' and reflects the reality that an initial investment can have substantially larger economic benefits as rounds of expenditure are transmitted through the economy. For this assessment, a multiplier of 1.5 has been applied based on strong supply chain linkages at the regional level.
- 4.1.8 Given the size and complexity of the Manchester economy, it is likely that supply chain businesses within Greater Manchester and the rest of the UK would benefit from spending during the construction of the proposed development. As a result, indirect jobs would be supported within the Greater Manchester economy related to suppliers of construction materials and equipment.
- 4.1.9 Furthermore, local businesses in proximity to the site, are likely to benefit from temporary increases in expenditure associated with the construction workforce on-site. For example, the construction workers might visit the nearby Fallowfield Retail Park or any other local restaurants in the neighbourhood during lunchtime. This would arise, through wage spending by workers in local shops, restaurants and other facilities and services. These economic benefits are referred to as induced effects.
- 4.1.10 Table 3 presents the temporary employment generated by the construction of the proposed development, taking leakage, displacement and multiplier effects into account. For the proposed development, the total net additional employment created within Manchester is estimated to be 261 FTE jobs, whilst 378 FTE jobs will be created outside of Manchester, supporting a total of 639 FTE net jobs during the temporary demolition and construction phase.

Table 3 Net Construction Employment (source: BuroHappold Calculations 2023)

	Manchester	Outside Manchester	Total
Gross Direct Employment	232	336	568
Displacement	58	84	142
Net Direct Employment	174	252	426
Indirect & Induced Employment	87	126	213
Total Net Employment	261	378	639

Gross Value Added (GVA) Impacts

- 4.1.11 The construction phase of the project will also make a significant contribution to Gross Value Added (GVA) which provides a measure of economic productivity.
- 4.1.12 Based on the latest ONS (2023; 2021) data available on GVA and employment within Manchester within the construction sector it is estimated that on average one FTE construction worker supports approximately £58,800 GVA. Applying this assumption to the net additional employment impact of the scheme (639 FTE jobs) it is estimated that the capital expenditure associated with the project could deliver an additional £38m of GVA. It should be noted that not all of this will be retained within Manchester's economy.

4.2 Operational phase impacts

- 4.2.1 This section sets out the economic effects of the proposed development once operational. This section is separated into two distinct sections: the economic effects of employment and the economic effects of student occupiers.
- 4.2.2 In estimating operational job generation, it is important to consider not just the direct effects of the scheme with regards to on-site employment but also net effects, taking into account displacement and multiplier effects as well as consideration of the relocation of existing employment on-site.
- 4.2.3 At the operational stage, employment figures for the commercial and student service uses within the proposed development are derived from the information provided by the client.

Employment

- 4.2.4 On completion, the proposed development will comprise student accommodation (3,300 beds) and a student services area. The proposed development will generate some direct employment. Both occupiers and employees will additionally support further employment and benefits indirectly through the supply chain and onward expenditure in the economy. These benefits will persist long-term for the lifetime of the development in its intended use.

Gross Direct Operational Employment

- 4.2.5 According to the information provided by the applicant, the entire Fallowfield campus (4,450 beds) employs 350 people. This employment figure includes employment generated from the operation, maintenance and management of student accommodation, commercial areas and student service areas.
- 4.2.6 Applying the pro-rata approach to the proposed 3,300 beds for this project, indicates that the proposed development could generate 260 gross direct jobs once complete and operational, with these jobs existing in perpetuity for the lifetime of the operation of the development providing the development is retained in its intended use.

Net Additional Direct Employment

- 4.2.7 The provision of 3300 new student beds will replace existing provisions within the Fallowfield campus. The new campus will also provide new student social services by replacing existing commercial space and amenities.
- 4.2.8 The employment generated by these uses within the proposed development can therefore not wholly be considered additional employment within Fallowfield Campus and instead will be displaced from existing accommodation blocks to new ones. Based on the pro-rata approach adopted, it is expected that 73 jobs could be considered net additional with the remaining jobs relocating from existing accommodations and commercial spaces.

GVA Impacts

- 4.2.9 Buro Happold has also estimated the GVA that could be generated through the gross direct employment within the proposed development.
- 4.2.10 This assessment has used SIC 77-82 to cover all employment with the proposed development, including combined facilities support activities and services to the buildings. Based on the average GVA per employee for SIC 77-82 (£36,500) for Greater Manchester, it is estimated that the proposed development could contribute a GVA of approximately £2.7m per year from the proposed employment activities on-site.

Student Expenditure

- 4.2.11 The earlier sections discussed the benefits of student accommodation at a macro level, in terms of construction and operational phases of development. However, there will be local-level benefits resulting from the increase in student population.
- 4.2.12 According to the estimates provided by the university (UoM, 2023) the average undergraduate student spends approximately £5,370 per annum on 'living costs' excluding tuition and accommodation costs.
- 4.2.13 To ensure a conservative estimate of new local spending, it is further assumed that some of those moving to the new market and intermediate student units would already be residents in the local area and would thus not generate net new expenditure. To account for this, a displacement rate of 25% has been applied based on HCA-ready reckoners (HCA, 2014).
- 4.2.14 Currently, 1,303 (no students residing in Owen's Park) students are residing within the existing development. The proposed development will cater to 3,300 students. Hence, the additional local

spending is calculated for the additional 1,997 students.

- 4.2.15 To account for additional regional expenditure, a leakage rate is accounted for. As the proposed development is well-served locally by amenities, it is assumed that 10% of the student expenditure will be leaked outside Manchester (HCA, 2014).
- 4.2.16 By applying these assumptions, a total net expenditure of £3,625 per person per annum is generated in the Manchester economy.
- 4.2.17 Applying the average expenditure figures to the estimated 3,300 students occupying the accommodation units within the proposed development, an estimated total net benefit of £7.2 million per annum of additional local spending is generated. For the proposed development, this equates to a net additional spend of approximately £7.2 million annually on food, shopping, leisure and other services.
- 4.2.18 Given the context of extensive retail and leisure opportunities within the city of Manchester, it is assumed that most of this money will be spent locally, thus supporting the local business ecosystem.

Table 4 Net Additional Student Expenditure (source: BuroHappold Calculations 2023)

	Gross Direct Expenditure (£)	Net Direct Expenditure (£)	Total Net Expenditure (£)
Existing development (£)	£6,997,110	£5,247,833	£4,723,049
Proposed development (£)	£17,721,000	£13,290,750	£11,961,675
Total Spending (£)	£10,723,890	£8,042,918	£7,238,626

- 4.2.19 This spending, together with the impact of the proposed student social services within the development, would create a positive impact on the local vitality, helping to uplift the economic viability and sustainability of the neighbourhood.

4.3 Local Regeneration and Infrastructure Impacts

Impact on the wider community

- 4.3.1 The development will have a positive regeneration impact on the local community. The scheme replaces 2,374 student beds that are no longer fit for purpose. The proposal intends to reduce waste production in demolition and maximise the reuse of materials to contribute to resource efficiency and reduce carbon emissions. Additionally, it consists of a robust waste management strategy to mitigate the impact of waste generation.
- 4.3.2 The proposed development is connected to the UoM via a high-frequency public transport route and lies close to the Oxford Road Corridor (Manchester Innovation District). It will act as a catalyst for the regeneration of the neighbouring Fallowfield town centre and establish investor confidence in the area.
- 4.3.3 The proposed development also adheres to Policy C6: 'South Manchester District Centres' by

supporting the development of the UoM facilities adjoining the Fallowfield District Centre.

- 4.3.4 Table 5 summarises how the proposed development will contribute to the wider Manchester Strategy objectives.

Table 5 Summary of the contribution of the proposed development to Manchester Strategy Outcomes

Manchester Strategy Outcomes	Summary of the contribution by the proposed development
A thriving and sustainable city: Supporting a diverse and distinctive economy that creates jobs and opportunities	Students make a significant economic contribution to Manchester whilst they live and study in the city. The development of assets like PBSA in proximity to the Oxford Road Corridor area is vital to capture the commercial potential of research and innovation and help to realise the economic potential of the Corridor.
A highly skilled city: world-class and homegrown talent sustaining the city's economic success	The proposed development will provide a high-quality residential offer for students, enhancing UoM's ability to attract and retain students in a global market. The retention of highly skilled graduates from UoM is a key component in the drive towards a knowledge economy, and forming the critical mass of activity necessary to strengthen the economy.
A liveable and low-carbon city: a destination of choice to live, visit, work	By providing high-quality, affordable student accommodation, and offering a convenient alternative to HMOs, the proposed development will mitigate the impact of large student populations on residential neighbourhoods, leading to improved resident satisfaction and making neighbourhoods a place where people want to live, visit and work.
A connected city: world-class infrastructure and connectivity to drive growth	The existing public transport infrastructure combined with proposed mobility interventions along the Fallowfield Loop and Wimslow Corridor will strengthen the connectivity of the proposed development with the UoM.
A progressive and equitable city: making a positive contribution by unlocking the potential of our communities	The proposed development will aid in freeing up former student lets, and private rented accommodations and, therefore, increase the supply of good quality homes for sale and rent will provide the opportunity for Manchester residents to raise their individual and collective aspirations.

- 4.3.5 A high-quality student accommodation with improved public realm and social amenities along with the nearby innovation district will help the city create a suitable knowledge-based ecosystem to attract students and retain them to stay in the city and contribute to the local economy.

Impact on the Local Housing Market

- 4.3.6 The proposed development adheres to Policy H12: 'Purpose Built Student Accommodation' of the Manchester Core Strategy. It supports the provision of new student accommodation when the accommodation is part of a university's redevelopment plans and meets Manchester City Council's regeneration priorities.

- 4.3.7 The proposed development aims to reduce the supply-demand gap of student accommodation in the city, thus relieving pressure on the private rental sector.
- 4.3.8 Considering the health and economic impact of high-quality PBSA over HMO, MCC aims to redirect students to PBSA to improve the living conditions of students and recover lost Council Tax revenue from HMO exemptions. The proposed changes to the Rental Reform Bill bring optimism by recognizing academic year alignment and supply-demand imbalances.
- 4.3.9 The proposed development comprises high-density, high-standard accommodation, located in an area compatible with existing developments and initiatives, and will not lead to an increase in on-street parking or disrupt the character of the area. This is to MCC's strategy to reduce dependency on poorer-quality HMOs to meet the student accommodation demand.
- 4.3.10 Encouraging students to shift from traditional HMOs to PBSA hinges on affordability, quality, convenience, and well-being enhancements. The proposed development will entail high-quality student services and amenities, making them more convenient and safer than the HMOs for students.
- 4.3.11 The proposed development will provide a greater sense of community than HMOs. It can provide significant economic benefits to local communities by creating additional jobs, generating tax revenue, and supporting local businesses.
- 4.3.12 The proposed development is planned to have effective management and efficiently designed infrastructure aiming to reduce the impact on the nearby residential neighbourhoods

Impact on the local economy

- 4.3.13 The proposed development will cater to the burgeoning student population, by providing appropriate, affordable accommodation. The students will drive the economic growth of the region through meaningful engagement with the local communities.
- 4.3.14 Many students tend to work in the local community on a part-time basis or under accredited apprenticeships and internship programs. This helps them achieve the necessary skills required to enhance productivity levels. A skilled local workforce would enhance the investment and employment prospects of the locality and contribute to the overall prosperity of the city. The graduate workforce will help resolve the current labour crisis.
- 4.3.15 Students residing on the Fallowfield campus have access to several shopping malls, weekly markets, and entertainment venues in the area. Several ongoing and proposed commercial and leisure developments near the campus will cater to the campus students. These include new retail parks, student accommodation, and public spaces.
- 4.3.16 The additional student spending resulting from an increase in student population would benefit local businesses. The nearby local supermarkets, including Tesco Express, Sainsbury's Local, and Co-op Food, local convenience stores, pharmacies, restaurants and pubs, alongside Manchester student market and Levenshulme Market, will benefit from a rise in student population. The influx of more students is also likely to have a positive impact on nearby sports facilities like the Manchester Aquatics Centre, and Platt Lane Sports Complex and leisure and entertainment businesses like O2 Apollo, and Dancehose Theatre.

Impact on the safety and security of the neighbourhood

- 4.3.17 The Crime Investigation Report produced by Manchester City Police highlights some existing site constraints such as lack of active road frontage and obstructed views due to vegetation as a security concern. It recommends measures that include preserving views, minimizing obstructive landscaping, and addressing tree canopies that affect lighting. Other recommendations to improve the safety of the campus include:
- Access control limits entry to residents and staff, with potential public access to specific zones.
 - Visible, non-recessed communal entrances.
 - Safeguarding ground floor windows and providing secure cycle parking.
 - Effective lighting and upgraded CCTV enhance safety in public areas.
- 4.3.18 The proposed development aims to enhance the student experience, prioritizing safety through lighting, wayfinding, and natural surveillance strategies. Secure-by-design principles guide external design, including building orientation for overlooking and strategic positioning of lighting and planting to eliminate hiding spots. The following design features and principles have been discussed in the Design Access Statement (DAS) and Design Guide to enhance the privacy and safety of the proposed development:
- Appropriate site organization facilitating passive supervision, ensuring well-lit primary circulation routes.
 - A coherent security strategy distinctly defines public, semi-private, and private spaces.
 - "Privacy planting" with dense evergreen plants deterring access near windows.
 - Use of hedges, fences, and railings integrated into the landscape to ensure visual permeability.
 - New boundaries or improvements shall consider security, accessibility, and placemaking.
 - External lighting shall achieve a balance between night-time safety and wayfinding.
 - Security is integrated from the main entrance to residential blocks, with careful consideration of inviting design elements.
- 4.3.19 MCC has taken cognisance of the high crime rate in the Fallowfield Loop and adjoining neighbourhoods and the Safer Streets Fund is allocating more than £300,000 in Manchester to address anti-social behaviour and enhance safety on the Fallowfield Loop. Led by GMCA, with support from MCC and Transport for Greater Manchester (TfGM), the initiative includes a community warden, a Safe Space hub, improved lighting, infrastructure, school partnerships for cycle training, and crime-reducing landscaping. The activated public realm will increase footfall throughout the day and enhance the safety and livability quotient of the neighbourhood through active and passive means of surveillance. The efforts aim to create a safer environment while also improving accessibility and connections in the region.
- 4.3.20 Steps undertaken by MCC in combination with safety and privacy considerations of the proposed development shall aid in improving the safety of the Fallowfield campus and neighbourhood.

5. Summary and Conclusions

- 5.1.1 Greater Manchester has one of the highest concentrations of students in Europe and the higher education sector is of great economic significance to the regional and local economy. There has been phenomenal growth in the student population post-pandemic, which has put tremendous pressure on the local housing market. The provisioning of adequate PBSA, closer to HEIs, has been a long-held objective of the Manchester City Council under its Housing strategy and planning policy framework. However, the delivery of new student accommodation has not been able to keep up with the pace of the growing student population. The lack of high-quality, affordable PBSA might reduce the city's competitiveness in attracting students and retaining a skilled workforce. Therefore, following the local, regional and national policies, it is imperative to provide an adequate supply of high-quality PBSA in the city.
- 5.1.2 The proposed development will accommodate up to 3,300 student accommodation beds at the University of Manchester Fallowfield campus. The development replaces the existing 2,374 student beds that are no longer fit for purpose. The development contributes to the lack of purpose-built student accommodation in the city and additionally, supports the growth of the Oxford Road Corridor. The regeneration will have a positive impact on the nearby Fallowfield district centre and the local economy.
- 5.1.3 Based on the analysis conducted in the previous sections, the proposed development at Fallowfield Campus will generate a range of economic and regeneration benefits for the local and wider area of Manchester, and contribute to the region's prosperity.
- 5.1.4 To summarise, the following key benefits will be realised by the proposed development:
- The construction and demolition phase of the proposed development will generate 639 FTE construction jobs, where 426 will be direct construction jobs and 213 jobs in supply chain and construction employee spending.
 - In the operational phase, the proposed development will accommodate approximately 260 jobs. Once existing employment is accounted for, the proposed development is estimated to result in a total net addition of 73 permanent jobs to the local economy.
 - Productivity benefits (GVA) will equate to approximately £38m during the demolition and construction phase and £2.7m during the operational phase of the proposed development.
 - Estimated student spending of approximately £7.2m per annum within the local area on food, drink, retail and leisure/services.
 - The proposed development will have a positive regeneration and infrastructure impact on the local community. The scheme will replace the old, dilapidated building stock with high-quality student accommodation and add circa 950 beds. This will help ease the pressure off the private residential rental market.
 - The proposed development will help increase the local vitality by enhancing the safety, liveability and sustainability quotient, of the neighbourhood.

- The proposed development aims to address the safety and security concerns of the neighbourhood.
 - The proposed development will improve the business, investment and employment prospects of the region.
- 5.1.5 The impact of the proposed student accommodation together with the investments in the neighbouring Oxford Road Corridor will establish the city of Manchester as one of the key centres for the knowledge economy.

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